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PeopleSoft Financials/Supply Chain Management 9.0 to 9.2 (through Update Image 5) Upgrade

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PeopleSoft Financials/Supply Chain Management 9.0 to 9.2 (through Update Image 5) Upgrade
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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, select the Knowledge tab, 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 Universityhttp://education.oracle.com.

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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, this documentation uses the conventions listed in the following table:

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

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

Products

This documentation may refer to these products and product families:

- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Enterprise Campus Solutions
- 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

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, select the Knowledge tab, and search for the Release Notes for your product and

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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, select the Knowledge tab, 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, select the Knowledge tab, and search for the upgrade documentation for your product and release level.

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.

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Chapter 1

Planning Your Application Upgrade

This chapter discusses:

- Understanding Application Upgrade Planning
- Understanding Your Upgrade
- 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 that 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
- Increasing Database Space
- Reviewing Upgrade Notes and Tips
- Reviewing Fixes Required at Upgrade

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.

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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.
- Making a Copy of Production Database.
- Retrieving and applying upgrade files.
- Creating and configuring an upgrade job.
- Setting the 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

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Task 1-1-3: 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. If you are an Oracle RDBMS customer, you also need to alter the tablespace for PSIMAGE and increase it to 200 MB, autoextend on the next 10 MB, with maxsize unlimited.

Properties

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

Task 1-1-4: 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.

- Third-Party Product Setup

  Be sure to review the release notes for your new application release, as third-party components such as Verity and Crystal Reports are no longer supported for the new application. The release notes will indicate the replacement component, such as Oracle Secure Enterprise Search (SES), XML Publisher, etc. Upgrading to the new application release will require you to set up these new third-party products. Review your application release notes and upgrade documentation for additional instructions.

  Verity Search is no longer supported as of PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 from an application standpoint, and instead Oracle Secure Enterprise Search (SES) has been adopted. When you upgrade to PeopleSoft FSCM 9.2 or later, you will need to set up SES for all product areas currently relying on Verity. In addition, the new PeopleSoft FSCM features take advantage of Oracle SES functionality, such as application- and component-based searches, and this functionality also requires SES installation.

  See the product documentation for PeopleTools: PeopleSoft Search Technology for your new release for information about Search Framework.

- Budget Cycle

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

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

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

- Expenses

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

- Period-End Close

  If you want to run period-end close prior to your upgrade, see the instructions in the PeopleSoft Financials/Supply Chain Management documentation for your product area for your release. You can access the documentation on My Oracle Support.

- 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.

- Working with Decoupled *PS_HOME*

  If you are working with a decoupled *PS_HOME*, you can put custom upgrade scripts in the *PS_CUST_HOME*. However, be careful when working with Data Mover scripts that generate or import a .dat file as the .dat file needs to be in the same "HOME" as the custom script.

  See the product documentation for PeopleTools: System and Server Administration for your new release for more information about working with PS_CUST_HOME.

Properties

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

Task 1-1-5: Reviewing Fixes Required at Upgrade

It is important that you run your upgrade using the latest versions of all upgrade software. It is also important to frequently search for and apply the Required at Upgrade fixes for your particular application. Refer to your application upgrade home page, section "Updates and Fixes Required at Upgrade" for more information about when and how to apply your Required at Upgrade fixes.

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See My Oracle Support, Your Application Upgrade Home Page for your new release, Updates and Fixes Required at Upgrade.

Properties

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

Task 1-2: Preparing Your Upgrade Job

This section discusses:

- Modifying the DB2 Scripts
- Editing the Language Swap Scripts
- Evaluating Upgrade Steps for Your Upgrade Job
- Preserving Files from the Initial Pass for MTP
- Modifying Compare Report Options
- Optimizing the Create and Alter Process

Task 1-2-1: 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.

Note. You can find these scripts in the new release *PS_APP_HOME* directory.

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 that you need to edit:

```
DLUPX02I.DMS

DLUPX13I.DMS

DLUPX96I.DMS

DLEPSYSI.DMS
```

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DLEPLASYSI.DMS

DLCGFAZ19I.DMS

DLCGGLZ20I.DMS

DLCGUPY39I.DMS

DLCGUPY41I.DMS

DLUPX14I.DMS

DLUPX16I.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.

Properties

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

Task 1-2-2: 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.

Note. You can find your application script in the *PS_APP_HOME* directory. The PT_RELEASE_SWAP.DMS script is in the *PS_HOME* directory.

The swap scripts for your path are:

DLEPLASWAP.DMS

PT_RELEASE_SWAP.DMS

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Properties

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

Task 1-2-3: Evaluating Upgrade Steps for Your Upgrade Job

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

Evaluating the Editing the Create and Alter Scripts step: 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 whether the appropriate edits have been made. If the edits have been made, then at this time you can mark the step Editing the Create and Alter Scripts as complete.

Evaluating Crystal steps: As of the PeopleSoft 9.2 application release, Oracle has migrated the application-delivered Crystal reports to XML Publisher. Two new steps, Preserving Crystal Process Definitions and Copying the UPG_CRW_DEFN Project, have been added to the upgrade to assist you with keeping both custom and Oracle-delivered Crystal process definitions if you want to keep using any deprecated Crystal reports. To continue to use Crystal reports in the new release, perform the following steps to enable the preservation of the Crystal process definitions in the initial pass of the upgrade.

To preserve Crystal process definitions:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Preparing for Application Changes, right-click the step Copying the UPG_CRW_DEFN Project and select *Step Properties.*
3. In the Step Properties dialog box, change the value in the Type field from *ManualStop* to *CopyDatabase.*
4. Click OK.
5. In the task Running New Release Compare Reports, right-click the step Preserving Crystal Process Definitions.
6. In the Step Properties dialog box, change the value in the Type field from *ManualStop* to *Application Engine.*
7. Click OK.

If you are not using Crystal reports in the new release, then perform the following instructions to skip the steps related to Crystal in the upgrade by marking them as complete.

To skip the Crystal steps:

1. In the task Preparing for Application Changes, select the step Copying the UPG_CRW_DEFN Project.
2. Select Edit, Complete, or press F7.
3. In the task Running New Release Compare Reports, repeat steps 1 and 2 for the step Preserving Crystal Process Definitions.

Evaluating Optional Temporary Tables Steps: If you are upgrading from PeopleTools 8.50 or higher, you have the option of skipping the re-creation of temporary tables that did not change in structure between application releases.

To skip re-creating temporary tables:

1. In the task Modifying the Database Structure, select the step Building the Optional Temporary Tables Script.

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2. Select Edit, Complete, or press F7.
3. Repeat steps 1 and 2 for the step Re-Creating Optional Temporary Tables.

Evaluating steps for automation: Determine whether 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 1-2-4: Preserving Files from the Initial Pass for MTP

Review the following steps and make sure to copy the files from your initial pass to the proper location for all your Move to Production passes, if they apply to your upgrade.

- Generating Timestamp Conversion Scripts (only for Oracle databases)
- Reviewing the SQL Table Rename Utility Output
- Running the DLCGGLZ20I Script
- Exporting Related-Language System Data
- Exporting Application System Data
- Exporting Notification Template Table
- Exporting Approval Framework System Data

Properties

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

Task 1-2-5: 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.

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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.

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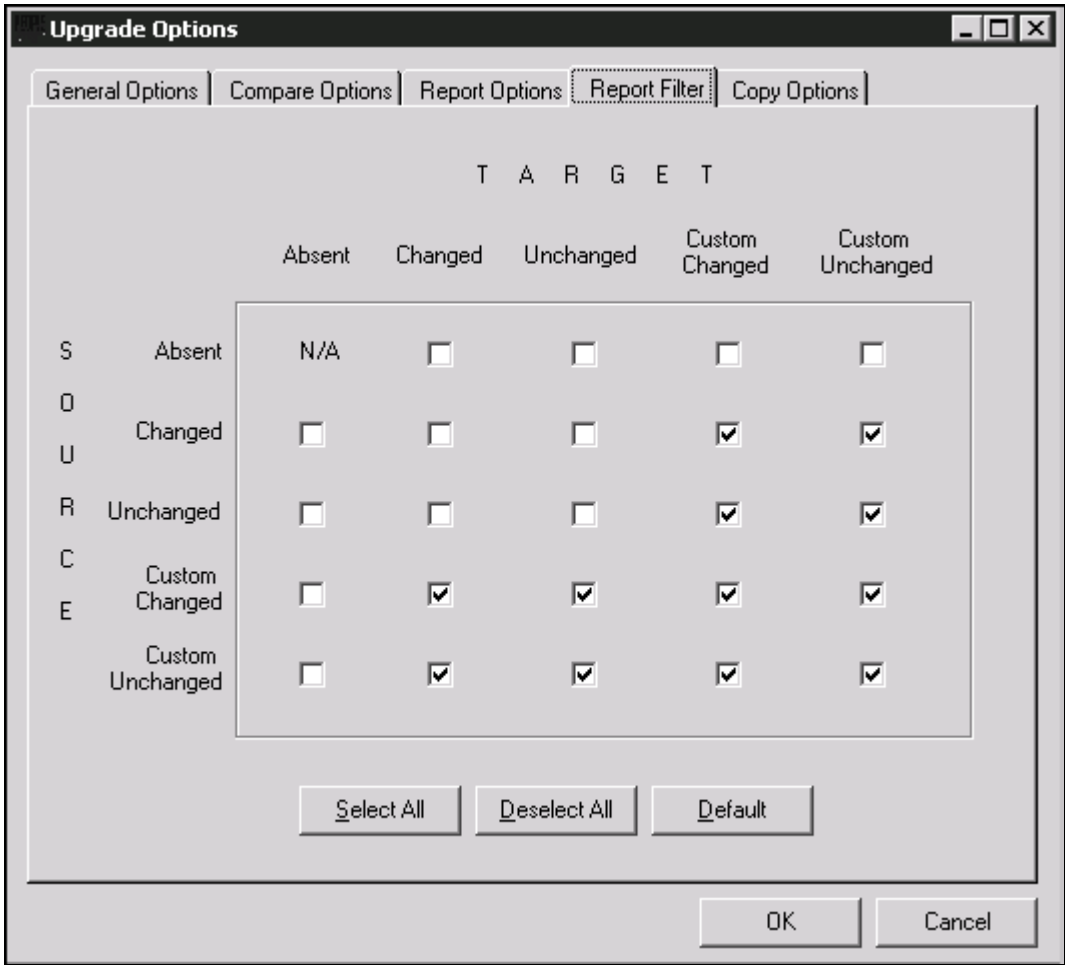
6. Change the default options as necessary and click OK.

   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

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Task 1-2-6: 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 script-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 will need to generate the SQL scripts again. This includes changes such as applying PeopleSoft PeopleTools upgrades (for example, PeopleSoft PeopleTools 8.52 or 8.53), 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 as 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 Apply Type to *Initial Pass.*

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.

You may choose to skip the following script-generation steps:

- 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 1-3: Identifying Customizations

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

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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 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_APP_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 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:

DLEPLASYSE.DMS

DLEPLASYSI.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:

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Tables	Scripts
Mass Change	MVAPPEXP.DMS MVAPPIMP.DMS
EDI	MVPRDEXP.DMS MVPRDIMP.DMS
Strings	MVAPPEXP.DMS MVAPPIMP.DMS
Messages	MVAPPEXP.DMS MVAPPIMP.DMS
XML Service Information	MVPRDEXP.DMS MVPRDIMP.DMS
Setup Manager 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 1-4: Backing Up Demo Databases

This section discusses:

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

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Task 1-4-1: 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 1-4-2: 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

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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
- Performing General Options Setup
- Reviewing Process Scheduler Processes
- Reviewing Country Data
- Reviewing ChartField Configuration
- Preparing Commitment Control
- Completing Billing Tasks
- Setting Up Receivables
- Verifying Grants Management Processes
- Setting Up Projects
- Managing Expense Approvals
- Preparing Expenses
- Preparing Asset Management
- Executing Payables Transactions
- Completing Batch Transactions
- Preparing Inventory
- Completing Supply Chain Planning
- Preparing Strategic Sourcing
- Preparing Services Procurement
- Completing Purchasing Tasks
- Completing eProcurement Tasks
- Processing Worklist Entries and Email Notification
- Setting Up Treasury
- Preparing Maintenance Management
- Reviewing Table Row Counts
- Preparing Your Database

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- Dropping PeopleTools Tables
- Renaming Records and Fields
- 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
- Editing the UPGOPT Project Script
- Running the UPGOPT Project Script
- Loading Upgrade Planning Related Data
- Setting Up Upgrade Planning Security

Understanding Applying Upgrade Planning Files

In this task, you apply the upgrade planning files 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

This step copies the UPGOPT project to your Copy of Production database. The project is delivered in the new release codeline.

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Properties

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

Task 2-1-2: Building the UPGOPT Project

This step generates the UPGOPT.SQL script to re-create any records delivered in the UPGOPT project.

Properties

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

Task 2-1-3: Editing the UPGOPT Project Script

In this step, you edit the UPGOPT.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	All	All

Task 2-1-4: Running the UPGOPT Project Script

This step runs the generated UPGOPT.SQL script to re-create records of the type *Table* and views that are delivered in the UPGOPT project.

Properties

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

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Task 2-1-5: Loading Upgrade Planning Related Data

This step loads upgrade planning related data, such as Access Groups, Messages, and Upgrade Query Trees, into your Copy of Production Database. This script and corresponding .DAT file are delivered in the new release codeline.

The script name for your upgrade is:

`UPGOPT_EP90.DMS`

Properties

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

Task 2-1-6: Setting Up Upgrade Planning Security

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

To set up security:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Enter the permission list for the users who will be reviewing and setting up functional requirements for the upgrade, then click Search.
3. Select or insert the menu name UPG_DEFINE_DEFAULTS, and click Edit Components.
4. Select all items in the menu.
5. Click OK.
6. Click Save.
7. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
8. Select the permission list for the users that review and set up functional requirements for the upgrade.
9. Navigate to the Query tab.
10. Select Access Group Permissions.
11. Add one row with the Tree Name UPG_QUERY_TREE_EP and the Access Group UPG_ACCESS_GROUP.
12. Click OK.
13. Click Save.

Properties

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

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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.

Note. You can find the scripts in the new release *PS_APP_HOME* directory.

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

PUEPFAZ41.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 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.

Properties

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

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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
- Running the Initial SYSAUD01 Report
- Running the Initial SWPAUDIT 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, SYSAUD01 (if applicable), SWPAUDIT, 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 Enterprise PeopleTools PeopleBook, System and Server Administration information, 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 program 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.

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

See Reviewing the Initial Audits.

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

Properties

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

Task 2-4-3: Running the Initial SYSAUD01 Report

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.52.

SYSAUD01 is an SQR script used to identify "orphaned" PeopleSoft objects. SYSAUD01 also identifies other inconsistencies within your database.

In this step, SYSAUD01 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 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 2-4-4: Running the Initial SWPAUDIT Report

SWPAUDIT is an SQR script used to identify potentially *orphaned* PeopleSoft objects in a multilingual database. For example, SWPAUDIT can identify a base and related-language record with mismatched key fields. This type of issue may cause inconsistent behavior between base and non-base language usage, or between pre-swapped and post-swapped databases.

SWPAUDIT should be run against your database before you run the Data Mover command SWAP_BASE_LANGUAGE. It can optionally be run again after a swap, or any time, to check database integrity in a multilingual context. If you are upgrading a database that has already been swapped, it is not mandatory to run SWPAUDIT again before proceeding with the upgrade.

In this step, SWPAUDIT is run using SQR from your current (old) PeopleSoft release against the Copy of Production.

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

See Reviewing the Initial Audits.

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See the PeopleTools: Global Technology PeopleBook for your current release, "Using Related Language Tables," Swapping the Base Language.

Properties

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

Task 2-4-5: 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 the type *Table* in your system are audited. This project also includes any custom records that you created in your system.

Properties

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

Task 2-4-6: 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. 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 2-4-7: Reviewing the Initial Audits

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

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Review the output from the SYSAUDIT, SYSAUD01 (if applicable), SWPAUDIT, 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 Oracle. Drop any unnecessary deleted tables now so that your future DDDAUDIT reports will be as clean as possible.

The Alter Audit produces the scripts INITALTAUD_ALTTBL.SQL, INITALTAUD_CRTIDX.SQL, and INITALTAUD_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 LUW 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, SYSAUDIT, SYSAUD01 (if applicable), and SWPAUDIT SQR (if applicable) scripts later in the upgrade. If you wish to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to manually rename the files 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 Enterprise PeopleTools PeopleBook, System and Server Administration information, for your current release.

Properties

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

Task 2-5: Performing General Options Setup

During this step, you perform a general options setup for all products.

To perform general options setup:

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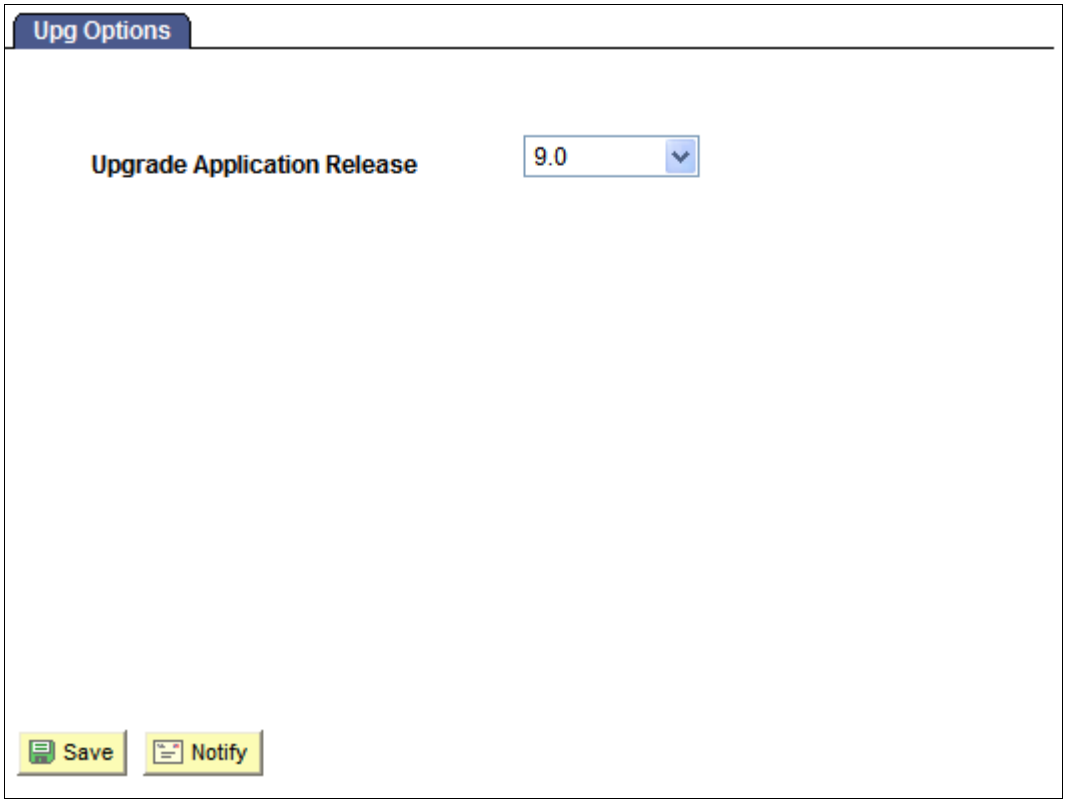
1. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Defaults.
   The Upg Options page appears:



Upg Options page

2. In the Upgrade Application Release field, enter the release number of your Target database.
   Some of the data conversions only run for specific target releases.
3. Click Save.

Properties

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

Task 2-6: Reviewing Process Scheduler Processes

You should verify that all processes submitted to the process scheduler server have been completed successfully or are cancelled before proceeding with the upgrade.

To view processes from the Process Monitor:

1. Select PeopleTools, Process Scheduler, Process Monitor.
2. Enter an appropriate time limit (such as the last hour, last day, or longer limit) using the drop-down list boxes

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and click Refresh.

3. Review any processes in the process list that did not end with a run status of *Success* or *Cancelled.*

   Any outstanding processes that you want to complete before proceeding with the upgrade should be completed at this time.

Properties

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

Task 2-7: Reviewing Country Data

The PeopleSoft system provides the 239 ISO-3166-compatible country codes as part of system data. However, the PeopleSoft system also includes an interface through which you can customize the country codes (either add new ones or modify existing ones). Because the COUNTRY_TBL record is considered system data, it will be repopulated with the current countries as Oracle has defined them. As a result, any additional countries that you may have added and any other customizations that you may have made to this table will be deleted.

You can skip this task if you have never customized country codes. The output of this query will be used to help with the cleanup that you will complete after data conversion.

Note. Move to Production: You can skip this task if you have not customized country codes since your initial upgrade pass.

To run the Country Table query:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following query report:

   `UPG_ECY01`

Note. Keep the output of this report; you will need it later in the upgrade process.

Properties

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

Task 2-8: Reviewing ChartField Configuration

In this task, you must carefully review your ChartField configuration actions in preparation for running the configuration process in the chapter "Applying Application Changes."

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Note. If you have *not* added any new ChartFields, you can skip this task. If you have added new ChartFields, all the new objects, tables, views, pages, and so on that you created when you initially ran the ChartField Configuration process need to be identified and copied over when you review your customizations in the chapter "Running and Reviewing Compare Reports."

To review the ChartField Configuration actions:

1. Select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Reports, Configuration Steps.
2. Enter the Configuration ID *INSTALL_PRODUCT* to generate the Configuration Steps Report.

   Note. You should save the Configuration Steps Report so that you can refer to it when you review your customizations.

Properties

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

Task 2-9: Preparing Commitment Control

This section discusses:

- Understanding Cleaning Up Commitment Control Data
- Using the Cleanup Utility

Understanding Cleaning Up Commitment Control Data

As of PeopleSoft FSCM 9.1, Oracle delivers new commitment control transaction tables that are used to maintain source product header information. These tables are referred as the "KK product header tables." Similar to the KK source header table (KK_SOURCE_HDR), the KK product header tables provide a cross-reference to the product's document headers that are impacted by the budget processor. The KK product header tables maintain the same key structure as the product's document header record, which prevents duplicate document headers. This also provides a better access path for processing performance.

Note. The KK product header tables do not replace the KK source header table (KK_SOURCE_HDR).

The upgrade process populates the KK product header tables from the KK source header table. Duplicate document headers can exists in the KK source header, which was identified as a problem in prior releases. Oracle provides a cleanup utility to help users identify and clean up duplicate commitment control transaction data.

Note. The upgrade process does not require the commitment control duplicate data to be cleaned up. However, Oracle recommends cleaning up the duplicate data prior to upgrade.

The upgrade process uses the following criteria to identify duplicate entries to upgrade:

- The upgrade will select the first KK source header with a valid status. The other duplicate entries for the same document are ignored

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- If there are no KK source headers with a valid status, the upgrade process will select the first row. The other duplicate entries for the same document are ignored.

Task 2-9-1: Using the Cleanup Utility

Duplicate commitment control data exists when there are multiple source header entries in the KK_SOURCE_HDR table for a document header (for example, Requisition, PO, Voucher, and Journal). Such errors are often difficult to diagnose and resolve and can result in data integrity problems. The commitment control cleanup utility provides a convenient way to identify duplicate transactions in the commitment control tables and take corrective action. This utility is available in PeopleSoft FSCM 8.9 and 9.0. The cleanup utility is not posted as a delivered fix so you must contact Oracle Software Support to request the utility.

The following table shows the appropriate resolution for your PeopleSoft FSCM release.

Release	Resolution	Bug Number
8.9	683317	11388800
9.0	758002	11494192

The commitment control cleanup utility identifies and corrects individual source transactions that are duplicated in the commitment control (KK) tables.

The utility performs the following main steps:

- Identifies duplicate transactions (Identify Process)
- Reviews and selects duplicate transactions for deletion (Selection)
- Deletes and un-posts duplicate transactions (Delete Process)

Properties

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

Task 2-10: Completing Billing Tasks

This section discusses:

- Running Billing Pre-Upgrade Reports
- Reviewing Billing Pre-Upgrade Reports

Task 2-10-1: Running Billing Pre-Upgrade Reports

PeopleSoft Billing pre-upgrade reports show you data conditions that you should address before the upgrade begins. An explanation of the reports and directions for the output information follow these instructions for running the reports.

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To run the pre-upgrade reports:

1. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
2. Run the following reports:

   ```
   Bills in Process, PUCGY002.SQR

   Billing Interface Process, PUCGY003.SQR
   ```

Properties

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

Task 2-10-2: Reviewing Billing Pre-Upgrade Reports

This section discusses:

- Reviewing Report PUCGY002
- Reviewing Report PUCGY003

Reviewing Report PUCGY002

This report lists bills in process. If a process aborts in the middle of processing, bills may be stuck in the *in process* state until the process is restarted. You must restart these processes and allow them to complete before proceeding with the upgrade.

To restart aborted bill processes:

1. Select PeopleTools, Process Scheduler, Process Monitor.
2. Enter the process instance from the report in the Instance field.
3. Click the Refresh button.
4. Click the Details link.
5. Select Restart Request.
6. Click OK.

Note. You may want to limit the restart ability to users who have the expertise to determine that an interface process has in fact terminated abnormally. Do not run the restart process unless you are absolutely sure that the original interface process has terminated.

Reviewing Report PUCGY003

This report displays Billing Interface processes that are considered *in process* and should be restarted. You must restart these processes and allow them to complete before proceeding with the upgrade.

To restart pending bill processes:

1. Select Billing, Interface Transactions, Process Billing Interface.

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2. Enter values in the From Interface ID and the To Interface ID fields, based on the report results.
3. Click Run.
4. Select Billing Interface.
5. Click OK to submit the process.
6. Run the Interface & VAT Defaulting job.

Properties

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

Task 2-11: Setting Up Receivables

This section discusses:

- Posting Receivables Transactions
- Processing Credit Card Payments
- Generating Customer Conversation Letters

Task 2-11-1: Posting Receivables Transactions

In this step, you need to successfully post all documents (worksheets, drafts, direct debits, payments, maintenance, transfers, finance charge groups, unpost groups, online pending items groups, direct journals, and so on) by running AR Receivable Update, where applicable.

To post receivables transactions:

1. Select Accounts Receivable, Receivables Update, Request Receivables Update and run Receivable Update (ARUPDATE).
2. Select Accounts Receivable, Receivables Update, Request Entry Event Processor and run Entry Event.
3. Select Accounts Receivable, Receivables Update, Revenue Estimates, Create Transactions and run AR Revenue Estimate.
4. Select Accounts Receivable, Receivables Update, Revenue Estimates, Budget Check Transactions and run the Commitment Control module.
5. Select General Ledger, Journals, Subsystem Journals, Generate Journals and run Journal Generator.

Properties

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

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Task 2-11-2: Processing Credit Card Payments

In the new PeopleSoft FSCM release, credit card processing in Oracle's PeopleSoft Receivables carries the deposit ID and payment sequence number on the history record. Therefore, all credit card payments that originate in PeopleSoft Receivables must be processed in PeopleSoft Receivables. Credit card transactions cannot be left in a denied state. All outstanding credit card payments must be resolved by either completing or deleting the payment before the upgrade begins.

To process credit card payments:

1. Select Accounts Receivable, Payments, Apply Payments, Process Credit Card Payments.
2. Add a run control ID.
3. Add all business units that have items paid by credit card.
4. Ensure that the Process Frequency is set to *Always Process* or *Process Once.*
5. Run the process AR_CRCARD.

Properties

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

Task 2-11-3: Generating Customer Conversation Letters

All customer conversation letters that have not been created must be generated before the upgrade.

Note. After the upgrade, customer conversation letters cannot be created from existing customer conversations.

See "Completing Database Changes," Completing Receivables Changes.

To run customer follow-up letters:

1. Select Accounts Receivable, Customer Interactions, Customer Follow-Up Letter.
2. Click the look-up icon (magnifying glass) for the SetID field, and select the customer setID.
3. Click the look-up icon (magnifying glass) for the Customer ID field, and select the customer ID.
4. Run PSJob FOLLOWUP.

Properties

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

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Task 2-12: Verifying Grants Management Processes

In this task, you verify the completion of the PeopleSoft Grants Management processes.

Before starting the upgrade, make sure that all of Facilities & Administration (FA) process instances have run successfully by verifying that no records are in the GM_PRJ_ERR table.

To verify the completion of the PeopleSoft Grants Management processes:

1. Select Grants, Awards, FA Error Interactive Report.
2. Run the Journal Generator process to generate journal entries for all accounting entries from the CA_ACCTG_LN_PC that have not been distributed.
3. Select General Ledger, Journals, Subsystem Journals, Generate Journals.
4. Use the GMDEFN Accounting Definition.
5. Select Reporting Tools, Query, Query Manager.
6. Run the following query:

   ```
   UPG_GFGMF02
   ```

7. Verify that no rows are returned.

Properties

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

Task 2-13: Setting Up Projects

This section discusses:

- Processing Third-Party Transactions

Task 2-13-1: Processing Third-Party Transactions

This section discusses:

- Understanding Third-Party Transactions
- Processing Third-Party Transactions
- Processing Third-Party Projects and Activities

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Understanding Third-Party Transactions

Due to changes to the Third-Party Staging Tables in the new PeopleSoft FSCM release, if you use the Third-Party Transaction Loader application engine (PC_INTFEDIT) or the Third-Party Project-Activity Loader application engine (PC_INTF_GEN), you need to process all third-party transactions, projects, and activities that are ready to be loaded before you begin the upgrade process.

Processing Third-Party Transactions

To process third-party transactions:

1. Select Project Costing, Third Party Integration, Load Transactions.
2. Create a new run control ID.
3. Accept all default values on the run control page.
4. Run the Third-Party Transaction Loader process.

Processing Third-Party Projects and Activities

To load third-party projects and activities:

1. Select Project Costing, Third Party Integration, Load Projects and Activities.
2. Create a new run control ID.
3. Accept all default values on the run control page.
4. Run the Third-Party Projects and Activities Loader process.

Properties

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

Task 2-14: Managing Expense Approvals

PeopleSoft Expenses uses an Approval and Workflow engine to manage expense transaction approvals. In preparation for the upgrade, you must ensure that all expense transactions are either in Pending status (unsubmitted) or Paid status (for expense reports and cash advances) or final approved status (for travel authorizations and time reports). If you are using post-payment audit functionality, any outstanding transactions for post-pay review must be completed prior to the upgrade. Transactions that are in the approval process may not be recoverable for routing to approver queues after the upgrade. This applies to both pre- and post-payment approvals.

To check whether there are any expense reports that have not been processed, select Travel and Expenses, Travel and Expense Center, Expense Report, View. Go to Advanced Search and search by status.

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Once the upgrade is completed and the system is in production, transactions that are in Pending status may be submitted normally and transactions that are already approved may be staged for further processing, as required. If you use the post payment audit feature, the Post Payments process will generate worklist entries and notifications for the post-payment auditor. Pending Tools worklist entries that were inserted for the post-pay auditor prior to upgrade will not be removed by the upgrade process, so you must manually mark these entries as "worked."

Properties

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

Task 2-15: Preparing Expenses

This section discusses:

- Running the Pre-Upgrade Expenses Queries
- Reviewing the Pre-Upgrade Expenses Queries

Task 2-15-1: Running the Pre-Upgrade Expenses Queries

In this step, you run the PeopleSoft Expenses pre-upgrade queries.

To run the re-upgrade queries:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following queries:
    - `UPG_EXZ01`, Business Unit Acctg Display
    - `UPG_EXZ02`, Expense Acctg Display by Role

Properties

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

Task 2-15-2: Reviewing the Pre-Upgrade Expenses Queries

In this step, you review the results of the UPG_EXZ01 and UPG_EXZ02 queries that you ran in the previous step.

In previous releases, Accounting Display was a setup option at either the Business Unit or the Expenses Role level. The options for setup were Update, Display Only, or Hide. This option referred to all accounting, whether it was the default accounting setup at the Expense transaction, or GL ChartFields or PC ChartFields at the line level of the transaction.

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As of PeopleSoft FSCM 9.1, this functionality is expanded so that you can separate the types of accounting to which the user has access. You will need to review the results of the UPG_EXZ01 and UPG_EXZ02 queries in order to decide how to set up the new Employee Privilege templates later in the upgrade in the chapter "Completing Database Changes," Completing Expenses Setup task.

Note. Keep the output of this report. You will need it prior to finishing the upgrade.

Properties

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

Task 2-16: Preparing Asset Management

This section discusses:

- Processing Pending Assets for Disposal
- Running Asset Management Interface Programs
- Reviewing IT Asset Management Business Rules
- Reviewing Common Search Configurations

Task 2-16-1: Processing Pending Assets for Disposal

All pending assets for disposal need to be processed before upgrading.

To process the assets pending for disposal:

1. Select Asset Management, Asset Transactions, Asset Disposal, Approve Disposals.
2. Select a disposal request from the list.
3. Approve or deny the assets contained in the request.
4. Repeat the process in steps 1 through 3 for each disposal request.
5. For approved assets, run the Transaction Loader to complete the disposal.

Properties

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

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Task 2-16-2: Running Asset Management Interface Programs

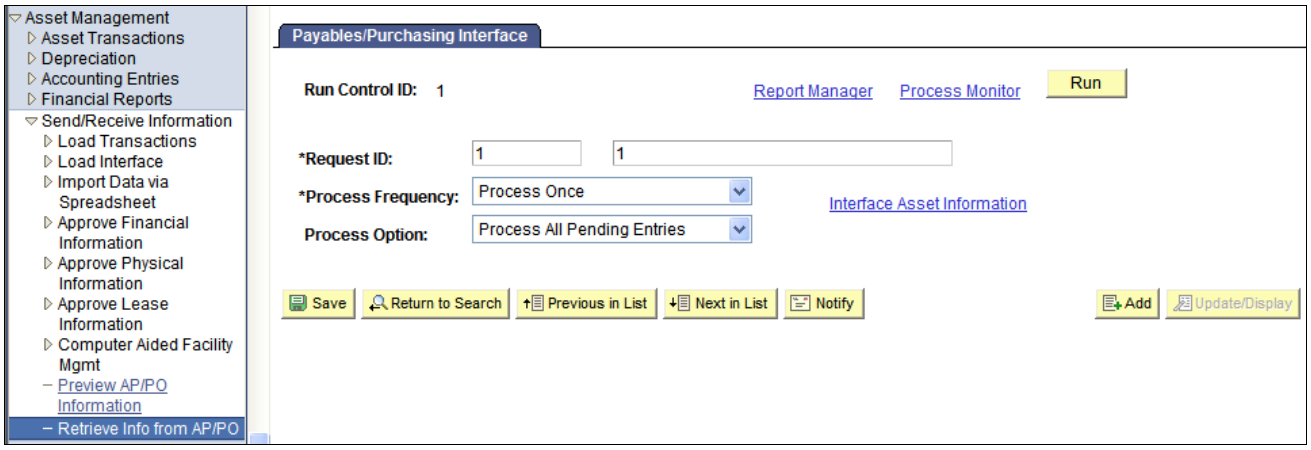
All pending interface transactions need to be loaded into Oracle's PeopleSoft Asset Management before upgrading. You must run the following two AM interface programs:

- Retrieve Info from AP/PO
- Load Transactions into AM

To run the AM interface programs:

1. Select Asset Management, Send/Receive Information, Retrieve Info from AP/PO.
2. Add a new run control ID.

   The Payables/Purchasing Interface page appears:



Payables/Purchasing Interface page

3. In the Request ID field, enter a request ID.
4. In the Process Frequency field, select *Process Once* from the drop-down list.
5. In the Process Option field, select *Process All Pending Entries* from the drop-down list.
6. Click the Run button to run the AMPS1000 program.
7. Select Asset Management, Send/Receive Information, Load Transactions, Load Transactions into AM.

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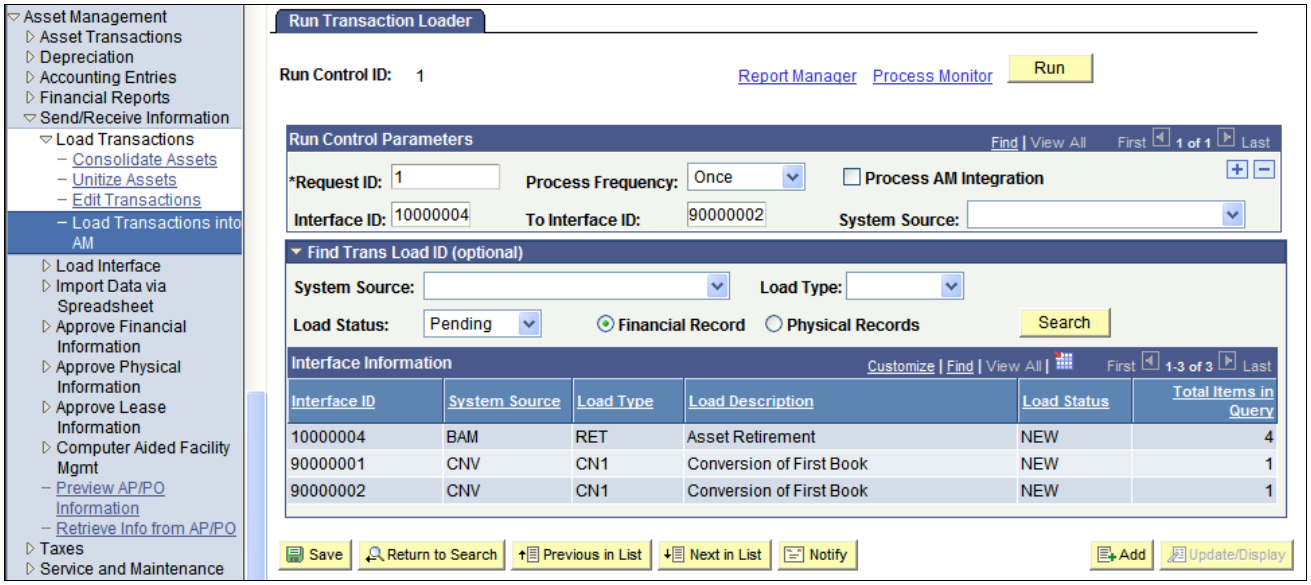
8. Add a new run control ID.

   The Run Transaction Loader page appears:



Run Transaction Loader page

9. In the Request ID field, enter a request ID.
10. In the Process Frequency field, select *Once* from the drop-down list.
11. In the Interface ID field, enter the first interface ID from the search list in the Interface Information section.
12. In the To Interface ID field, enter the last interface ID from the search list in the Interface Information section.
13. Click the Run button to run the AMIF1000 program.

Properties

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

Task 2-16-3: Reviewing IT Asset Management Business Rules

Run this step *only* if you license Oracle's PeopleSoft IT Asset Management. If you do not have PeopleSoft IT Asset Management, you can skip this step.

In the new PeopleSoft FSCM release, the tables related to business rules have been modified. Therefore, all changes made to PeopleSoft IT Asset Management business rules must be noted before the upgrade, as the upgrade overwrites these changes. After the upgrade, reapply these changes.

If no customizations or changes have been made to the delivered business rules, then you can skip this step.

To review the existing business rules:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following query:

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```
UPG_ITS01
```

To review the details of the existing business rules:

1. Select Set Up Financials/Supply Chain, Product Related, IT Asset Management, Business Rules.
2. Select each business rule and check for customizations.

   Make note of any customizations that you find.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Asset Management	All	All

Task 2-16-4: Reviewing Common Search Configurations

Run this step *only* if you license PeopleSoft IT Asset Management. If you do not have PeopleSoft IT Asset Management, you can skip this step.

In this step, review any changes made to Common Search Configuration. In the new PeoleSoft FSCM release, new configurations such as ASSET_CONSOL_01, IT_ACTN_INQ, IT_IGN_INQ, IT_LOAD_ERRORS, PT_PHY_USE, and IT_PRGS_DTL have been added. Make note of any changes made to the configurations and reapply them after the upgrade.

Note. If no customizations or changes have been made to the delivered Common Search Configurations, then you can skip this step.

To review Common Search Configuration:

1. Select Set Up Financials/Supply Chain, Product Related, IT Asset Management, Common Search Configuration.
2. Select each Common Search Configuration and check for customizations.

   Make note of any customizations that you find.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Asset Management	All	All

Task 2-17: Executing Payables Transactions

This section discusses:

- Customizing Pay Cycle Definition
- Closing Payables Pay Cycles

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- Posting Payables Transactions
- Running Journal Generator Edit and Post
- Cancelling Rescheduled Payments

Note. Match Rule Exceptions must be resolved before running data conversions.

Task 2-17-1: Customizing Pay Cycle Definition

Due to changes in Pay Cycle in the new release, the upgrade process will overwrite any modifications that you have performed on the Payment Source, Mapping, Step, and Step Definition tables. If you have customized the setup for any of these tables, make note of the changes. If you wish to reapply these customizations at the end of the upgrade, Oracle strongly recommends that you complete the upgrade first and then make sure that Pay Cycle is running properly before attempting to reapply any customizations.

To determine what changes have been made to the Step Group Model, select Accounts Payable, Payments, Pay Cycle Definition, Step Table.

Note. Pay Cycle Mapping contains vital system data for Pay Cycle processing. Do not change mapping data on existing source transactions. If you need to customize Pay Cycle Mapping, Oracle recommends that you add a new source transaction, then enter mapping data onto Pay Cycle Mapping for the new source transaction.

See the product documentation for PeopleSoft FSCM: Payables for your new release.

Properties

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

Task 2-17-2: Closing Payables Pay Cycles

Due to the Financial Gateway enhancement in Pay Cycle, all pay cycles must either be completed or reset before starting the upgrade process.

To find all pay cycles that need to be completed or reset:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following query:

   ```
   UPG_APY01
   ```


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Properties

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

Task 2-17-3: Posting Payables Transactions

Before beginning your upgrade, you must post all your voucher, payment, and withhold transactions and generate the corresponding accounting lines.

Run the voucher, payment, and the withholding posting processes before continuing with this upgrade.

To post Payables transactions:

1. To voucher post, select Account Payables, Batch Processes, Vouchers, Voucher Posting.
2. To payment post, select Account Payables, Batch Processes, Payments, Payment Posting.

   Note. You must post all vouchers and payments before performing the next step.

3. To withhold post, select Vendors, 1099/Global Withholding, Maintain, Post Withholdings.

Properties

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

Task 2-17-4: Running Journal Generator Edit and Post

Make sure that the previous step, Posting Payables Transactions, is completed before proceeding with this task.

Before starting your upgrade, you must run Journal Generator, Journal Edit, and Journal Posting for all Accounts Payables accounting entries that have been posted but not yet processed by Journal Generator. This is the only way to guarantee that all transactions will be posted to the accounts, as you have previously defined them. Run the Journal Generator process for all General Ledger business unit/ledger group combinations before continuing with this upgrade.

To run Journal Generator, Journal Edit, and Journal Post:

1. To run Journal Generator, select General Ledger, Journals, Subsystem Journals, Generate Journals.
2. To run Journal Edit, select General Ledger, Journals, Process Journals, Edit Journals.
3. To run Journal Post, select General Ledger, Journals, Process Journals, Post Journals.

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Properties

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

Task 2-17-5: Cancelling Rescheduled Payments

This step cancels rescheduled payments. If you want to cancel any rescheduled payments, you need to complete the cancellations before the upgrade begins.

To cancel any rescheduled payments:

1. Select Accounts Payable, Payments, Pay Cycle Processing, Cancel Rescheduled Payments.
2. Enter a run control ID.
3. Click Search to proceed with the cancellation process.

Properties

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

Task 2-18: Completing Batch Transactions

This task is required if you do batch or data collection transaction processing. In this task, you complete or cancel any remaining batch transaction processes. You must confirm that any outstanding batch (BCT) transactions have been completely processed or cancelled before proceeding with the upgrade. The staging tables are not converted, and you may lose data that resides in these tables.

To complete or cancel BCT transactions:

1. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
2. Run the report Outstanding Batch Transactions, PUCGY257, to retrieve a list of business units with transactions that have not been closed or cancelled.
3. Select SCM Integrations, Transaction Error Handling, Maintain Transactions.
4. For every business unit listed in the Outstanding Batch Transactions report, complete these steps:
   a. On the Transaction Maintenance page, click the look-up icon (magnifying glass) and select a business unit.
   b. Click the Search button.

      The Transaction Details page appears.

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c. For each transaction entry that does not have the status *Complete,* click the EIP Control ID link and either complete or cancel the transaction.

5. If any rows are returned, you must repeat steps 3 and 4 for every applicable business unit.

Properties

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

Task 2-19: Preparing Inventory

This section discusses:

- Confirming Shipping and Depleting All Orders
- Costing and Posting Inventory Transactions
- Running Inventory Balances Report
- Defining Delivery Setup Defaults

Task 2-19-1: Confirming Shipping and Depleting All Orders

You must confirm, ship, and deplete all orders that have appeared on a pick plan before proceeding with the upgrade.

To confirm, ship, and deplete orders:

1. Make any picking feedback modifications by selecting Inventory, Fulfill Stock Orders, Picking, Material Picking Feedback.
2. When complete, mark all open pick lines as confirmed by selecting the Confirm check box for all lines or by clicking Confirm All.
3. Run picking confirmation for all open pick lines by selecting Inventory, Fulfill Stock Orders, Picking, Picking Confirmation Process.
4. If Auto-Ship was not selected for all pick lines, ship all lines by selecting Inventory, Fulfill Stock Orders, Shipping, Shipping/Issues.
5. Run depletions for all shipped orders by selecting Inventory, Fulfill Stock Orders, Shipping, Deplete On Hand Quantity.

Properties

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

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Task 2-19-2: Costing and Posting Inventory Transactions

In this step, you cost all Oracle's PeopleSoft Inventory transactions and post them to Oracle's PeopleSoft General Ledger.

Important! Prior to running the data conversion scripts, you must cost all PeopleSoft Inventory transactions and post them to PeopleSoft General Ledger.

To cost and post PeopleSoft Inventory transactions:

1. Run both the transaction costing and accounting line creation processes by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Cost Accounting Creation.
2. For all transaction groups, select the options Cost Inventory Transactions and Create Accounting Lines.
3. Select Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Accounting Line Errors.
4. Verify that there are no errors for any PeopleSoft Inventory business unit.
5. Run Journal Generator by selecting General Ledger, Journals, Subsystem Journals, Generate Journals.
6. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
7. Run the report Verify Costing Transaction, PUCGY303, to ensure that all PeopleSoft Inventory and, if applicable, Oracle's PeopleSoft Manufacturing transactions are posted to PeopleSoft General Ledger.

   This report verifies that all PeopleSoft Inventory transactions have been costed and posted to the PeopleSoft General Ledger. If any unprocessed transactions exist, you will not be able to reconcile costing after the upgrade.
8. Repeat steps 1 through 5 until there are no unprocessed transactions on the report.

Properties

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

Task 2-19-3: Running Inventory Balances Report

Run the Inventory Balances report to make it easier to reconcile the inventory quantities and values after data conversion.

To run the Inventory Balances report:

1. Select Inventory, Manage Inventory, Reports, Inventory Balances.
2. If you encounter any discrepancy in the report, please call Oracle Software Support for help in resolving the problem before continuing with the upgrade.

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Properties

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

Task 2-19-4: Defining Delivery Setup Defaults

In this step, you define the default values for delivery processing to use when creating deliveries during the data conversion process. Deliveries will be created for any current or historical Order Management orders that have freight charges or estimated shipments associated with them. As of PeopleSoft FSCM 9.1, freight is maintained at the delivery level. If you do not set up the delivery auto-numbering beginning sequence as noted below, then the prefix on each of the new delivery IDs will default to *UPG*.

To define the default delivery options:

1. Select Set Up Financials/Supply Chain, Upgrade, Define Delivery Defaults.
2. Enter the default weight and volume units of measure.
3. For each set control value, enter the default automatic numbering beginning sequence string.
4. Click Save.

Properties

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

Task 2-20: Completing Supply Chain Planning

Prior to data conversion, you must complete the entire Oracle's PeopleSoft Supply Planning process, which includes:

- Running the PeopleSoft Supply Planning Post Application Engine.
- Applying all PeopleSoft Supply Planning messages in Oracle's PeopleSoft Production Management, Oracle's PeopleSoft Purchasing (if applicable), and Oracle's PeopleSoft Inventory (if applicable).

Posted PeopleSoft Supply Planning messages that are not fully processed (approved and applied) will become obsolete in the upgraded environment.

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Properties

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

Task 2-21: Preparing Strategic Sourcing

This section discusses:

- Reviewing Event Status

Task 2-21-1: Reviewing Event Status

In this step, you ensure that all events are either closed for bidding or cancelled. You need to either close or cancel events that are open for bidding prior to starting data conversion.

To determine event status:

1. Select Sourcing, Maintain Events, Event Workbench.
2. Use the Event Status field to filter for any events in the posted status.
3. Cancel or award any posted events as follows:
   - Click the Cancel icon to cancel a posted event.
   - Click the Analyze Bid icon to award a posted event.

Properties

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

Task 2-22: Preparing Services Procurement

This section discusses:

- Running the Pre-Upgrade sPro Queries
- Reviewing the Pre-Upgrade sPro Queries

Task 2-22-1: Running the Pre-Upgrade sPro Queries

In this step, you run Oracle's PeopleSoft Services Procurement pre-upgrade query.

To run the pre-upgrade query:

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1. Select Reporting Tools, Query, Query Viewer.
2. Run the following query:

```
Provider Auto Time Approval, UPG_SPZ11
```

Properties

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

Task 2-22-2: Reviewing the Pre-Upgrade sPro Queries

This section discusses:

- Reviewing Query UPG_SPZ11

Reviewing Query UPG_SPZ11

The Auto Timesheet Approval option has been removed from the Service Provider Information page. This report provides a list of all service providers for whom this option was enabled. After data conversion completes, you use this report to set up automatic workflow so that these providers will have their timesheets automatically approved when they are submitted.

Properties

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

Task 2-23: Completing Purchasing Tasks

This section discusses:

- Loading Change Requests

Task 2-23-1: Loading Change Requests

There have been a number of changes to the way change requests via EDI are now handled. Oracle highly recommends that you load and process all change requests made from EDI processes prior to the data conversion to guarantee that no information is lost or orphaned.

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Properties

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

Task 2-24: Completing eProcurement Tasks

In the new PeopleSoft FSCM release, the approval process for Oracle's PeopleSoft eProcurement Change Requests has been changed. Oracle highly recommends that you process all your change requests prior to data conversion in order to ensure that no information is lost or orphaned.

Properties

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

Task 2-25: Processing Worklist Entries and Email Notification

As of PeopleSoft FSCM 9.1, the worklist names for agreement entries were renamed to be more descriptive. The Work Item name "Approval Routing" changed to "Contract Compliance Notice," and the Worked by Activity name "Redirect" changed to "Review or Update Agreement." These renames were also made in PeopleSoft FSCM 8.9 Bundle 16 and PeopleSoft FSCM 9.0 Bundle 7. If you are not up on any of these bundles when you upgrade to PeopleSoft FSCM 9.1 or later, you must finish processing your worklist entries before the upgrade. Otherwise you will no longer to able to access the old worklist entries after the upgrade. All new worklist notifications are sent with the new names.

If you have any email notifications for agreements, you may also want to finish processing them before the upgrade. You should be able to still process them after the upgrade, but the system will bring you to a search page instead of directly to the Agreement page. This is because Contract Versions and Contract Category Lines are now supported in PeopleSoft FSCM 9.1 and later.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

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Task 2-26: Setting Up Treasury

This section discusses:

- Understanding the Treasury Setup
- Running Auto Position Process
- Running the Payment Dispatch Process

Understanding the Treasury Setup

In this task, you rerun the Auto Position process for all deals. Run this task only if you license Oracle's PeopleSoft Treasury.

Task 2-26-1: Running Auto Position Process

During this step, you will ensure that the Auto Position process is run for all deals. This will process every deal (with its most recent data) to calculate the cash flows, position, and accounting events.

Note. Complete this step only if you license PeopleSoft Treasury.

To rerun the Auto Position process:

1. Select Deal Management, Capture Deals, Deal Position Update.
2. Select the Process All Outstanding Deals switch and run the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management Risk Management	All	All

Task 2-26-2: Running the Payment Dispatch Process

You should run the payment dispatch process before running the upgrade to make sure all payments have been formatted, paid, and dispatched to the bank. This will avoid any data corruption from changes to the bank setup during the upgrade; for example, the addition of new payment formats and edits such as SEPA.

Note. Complete this step only if you license PeopleSoft Treasury.

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Properties

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

Task 2-27: Preparing Maintenance Management

This section discusses:

- Running the Preventive Maintenance Process
- Deleting Projection Staging Data

Task 2-27-1: Running the Preventive Maintenance Process

In the new PeopleSoft release, new functionality has been added to the Preventive Maintenance process. Therefore, all pending work orders must be created prior to the upgrade. In this step, you run the Preventive Maintenance report. The information given in this report shows which work orders were created. Be sure to review it to ensure that all work orders were created successfully.

To run the Preventive Maintenance process for all business units:

1. Select Maintenance Management, Preventive Maintenance, Run Preventive Maintenance.
2. Add a new run control.
3. On the Selection tab, enter the Request ID and Description.
4. Select *Always Process* for the Process Frequency.
5. Select *All Business Units* for the Selection Type.
6. Save the page.
7. Click Run.
8. Select *Preventive Maintenance Job.*
9. Click OK.
10. On the Selection tab, click the Process Monitor link.

    Verify that the process ended successfully.
11. Click the WMPM job link.
12. Click the WM_PM process link.
13. Click the Message Log link and verify that the PM schedules were selected and work orders were created.
14. Return to the Process Detail page.
15. Click the WM200001 report link.
16. Verify the report information.

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Properties

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

Task 2-27-2: Deleting Projection Staging Data

All projections must be deleted prior to the upgrade. This ensures that all the projections staging data is generated with the new fields that were added in the new release of Oracle's PeopleSoft Maintenance Management. After the upgrade is complete, all projections will show the correct values for new fields.

To delete projection staging data:

1. Select Maintenance Management, Preventive Maintenance, View Projection Summary.
2. Select *Process Instance.*
3. Click Delete.
4. Verify that the Projected Maintenance grid area shows no rows.
5. Save the page.
6. Repeat these steps for all process instances on the search list.

Properties

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

Task 2-28: 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

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Task 2-29: Preparing Your Database

This section discusses:

- Understanding Database Preparation
- Verifying Database Integrity
- Cleaning the PSOBJCHNG Table
- Purging Message Queues
- Deleting DDDAUDIT Output Data
- Deleting Performance Monitor System Default Data
- Cleaning Up PeopleTools Data
- Dropping Temporary Tablespaces
- 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 2-29-1: Verifying Database Integrity

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

This table lists database platforms and the corresponding commands to run database consistency checks:

Platform	Command
DB2 LUW	`db2dart`
Informix	`oncheck`
Microsoft SQL Server	`DBCC CHECKDB`
Oracle	`dbv`
Sybase	`DBCC CHECKDB`

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW Informix MSSQL Server Oracle Sybase	All

Task 2-29-2: 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 2-29-3: Purging Message Queues

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

This step runs the following PeopleSoft Data Mover script, 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.

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Properties

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

Task 2-29-4: Deleting DDDAUDIT Output Data

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.53.

In this step, the PeopleTools table PS_PTUPGDDDOUTPUT is truncated to ensure the successful completion of your upgrade. Because the primary key index on this table changed in PeopleTools 8.54, the data stored in this table needs to be deleted to ensure that the index can be successfully created later in the upgrade.

Properties

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

Task 2-29-5: Deleting Performance Monitor System Default Data

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.45 through 8.53.

In this step, the PeopleTools table PSPMSYSDEFAULTS is truncated to ensure the successful completion of your upgrade. Because a primary key index was added to this table as of PeopleTools 8.54, the data stored in this table needs to be deleted to ensure that the index can be successfully created later in the upgrade.

Properties

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

Task 2-29-6: 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, 8.49, 8.50, or 8.51. 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.

Use the following instructions for your specific PeopleSoft PeopleTools release:

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- If you are upgrading from PeopleSoft PeopleTools 8.46, 8.47, 8.48, or 8.49:

  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 the PeopleTools PeopleBook: PeopleTools Portal Technologies, 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.

  Note. You may skip the cleanup of the PSLOCALEORDER table in Move to Production upgrade passes.

- If you are upgrading from PeopleSoft PeopleTools 8.50 or 8.51:

  PSCUBRUNCNTL is the run control table that stores the set of parameters required for running the process to build Essbase cube. The run control table should be keyed by user ID and run control ID.

  See the PeopleTools PeopleBook: PeopleSoft Process Scheduler, Submitting and Scheduling Process Requests, Understanding Run Control IDs.

  Prior to PeopleSoft PeopleTools 8.52, CUB_OUTLINEID, CUB_CONNECTID, ANALYSIS_DB_APP, and ANALYSIS_DB_NAME were incorrectly defined as keys, causing non-unique run control IDs to be created. As of PeopleSoft PeopleTools 8.52, a unique index with the keys OPRID and RUN_CNTL_ID will be created for the PSCUBRUNCNTL table. You need to ensure that PSCUBRUNCNTL 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 OPRID and RUN_CNTL_ID, run the following SQL:

  ```
  SELECT OPRID, RUN_CNTL_ID, COUNT(RUN_CNTL_ID) AS NUMBER_OF_DUPLICATE_⇒
  ROWS FROM PSCUBRUNCNTL GROUP BY OPRID, RUN_CNTL_ID HAVING COUNT(RUN_⇒
  CNTL_ID) > 1;
  ```

  This SQL will return the number of duplicate rows that share the same set of values for OPRID and RUN_CNTL_ID. 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	Both	All	All	All

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Task 2-29-7: Dropping Temporary Tablespaces

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.51. In this step, you will drop temporary tablespaces prior to performing the PeopleSoft PeopleTools upgrade.

If you are upgrading from PeopleSoft PeopleTools 8.51, drop the PSTBSPC and PSTBSP32 tablespaces, if they exist, from the PSPTDMO database, or from the database where the PeopleTools tables are stored.

Properties

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

Task 2-29-8: 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 PeopleSoft 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 shrink images again, 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 or a PeopleSoft PeopleTools 8.45 release earlier than 8.45.08, 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);
```


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```
-- 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(IMAGESIZE) IMAGESIZE FROM PS_CONVIMG⇒
 WHERE DBMS_LOB.GETLENGTH(IMAGESIZE) > 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 2-30: Dropping PeopleTools Tables

This section discusses:

- Understanding Dropping PeopleTools Tables
- Dropping the PS_PSMCFQUEUESLANG Table
- Dropping the PSOPTSTATUS Table
- Dropping PeopleSoft Update Manager Tables

Understanding Dropping PeopleTools Tables

In this task, you drop PeopleSoft PeopleTools tables to ensure the successful completion of your upgrade.

Task 2-30-1: Dropping the PS_PSMCFQUEUESLANG Table

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.42 or 8.43.

In this step, the PeopleTools table PS_PSMCFQUEUESLANG is dropped to ensure the successful completion of your upgrade. The table does not contain data and can be safely dropped.

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Properties

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

Task 2-30-2: Dropping the PSOPTSTATUS Table

PeopleSoft Change Assistant will display and run this step only if your are upgrading from PeopleSoft PeopleTools 8.45 or lower.

In this step, the PeopleTools PSOPTSTATUS is dropped to ensure the successful completion of your upgrade. The table will be converted into a view and can be safely dropped.

Properties

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

Task 2-30-3: Dropping PeopleSoft Update Manager Tables

PeopleSoft Change Assistant will display and run this step only if your are upgrading from PeopleSoft PeopleTools 8.53.

In this step, the PeopleTools tables PS_PTIACPTMPLTDEFN and PS_PTIACPTMPLTSTEP are dropped to ensure the successful completion of your upgrade. Neither table contains data and both can be safely dropped.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW DB2 z/OS Informix MS SQL Server Sybase	All

Task 2-31: Renaming Records and Fields

This section discusses:

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- Understanding Renaming Records and Fields
- Exporting the Rename Utility
- Importing the Rename Utility
- Building the Rename Utility Project
- Editing the Rename Project Script
- Running the Rename Project Script
- Exporting Rename Utility Data
- Importing Rename Utility Data
- Running the Data Mover Rename Utility
- Reviewing the Data Mover Rename Utility Output
- Running the Data Mover Rename Script
- Retaining the Target Rename Log Files
- Running Data Mover Renames on Copy of Current Demo

Understanding Renaming Records and Fields

During the development of new releases, Oracle sometimes renames records, fields, or specific occurrences of a field on a record (recfield renames). In this task, you will generate and execute scripts to rename those same objects in your Copy of Production and Copy of Current Demo databases.

With these commands, PeopleSoft Data Mover renames the objects in the record and field definitions in PeopleSoft Application Designer and then logs an entry on the table PSOBJCHNG. This process also changes all references to these objects in pages and PeopleCode. This will not rename the objects on the database tables at this time.

Later in the upgrade, you will generate the SQL that will alter the tables on the database. This alter process reads PSOBJCHNG and will rename these tables and fields. The SQL generated to perform that task will be different depending on the build options that you select and your database platform, however the result is the same. For record renames, the old table no longer exists and the new table contains the data from the old tables. For field and recfield renames, any affected tables will contain the new column with data from the old column; the old column no longer exists on the tables.

If a field rename does not go through this process, the alter SQL will not recognize it as a rename. After the alter, both old and new columns exist on the table and a data conversion process is required to copy the data from the old column to the new column. This is an important distinction to make.

Important! It is very important to resolve any errors with these rename scripts. Do not skip any lines that error. It is not possible to recover from missed renames. The consequences of skipping a rename are evident later in the upgrade when you are in the middle of running data conversion programs.

A few different things could happen: the conversion program could error because the PeopleSoft system is expecting only the new column on the table, but you have both old and new, or you may lose data. Because of the rename, the PeopleSoft system expects the data to be handled in the SQL alter process. If the data doesn't move in the SQL alter process, and you don't write a data conversion program to move the data, the process drops the old column without having copied the data to the new column.

There are several advantages to using this rename process. Any references to the renamed records or fields in your customizations will also be modified. The number of differences on the compare reports is reduced. The SQL alter moves the data from old to new efficiently and no additional data conversion steps are required.

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Task 2-31-1: Exporting the Rename Utility

This step copies the UPG_RENAMES project to file. This project contains the UPG_REN_DMS and UPG_REN_SQL Application Engine programs and their related objects.

Properties

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

Task 2-31-2: Importing the Rename Utility

This step imports the UPG_RENAMES project into your Copy of Production database.

Properties

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

Task 2-31-3: Building the Rename Utility Project

This step generates the UPG_RENAMES.SQL script that will be used to create and/or alter the records that are delivered in the UPG_RENAMES project.

Properties

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

Task 2-31-4: Editing the Rename Project Script

In this step, you edit the UPG_RENAMES.SQL script that was generated in the previous step 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, 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.

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Properties

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

Task 2-31-5: Running the Rename Project Script

This step runs the generated UPG_RENAMES.SQL script to create and/or alter the records that are delivered in the UPG_RENAMES project.

Properties

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

Task 2-31-6: Exporting Rename Utility Data

This step runs the PUUPX98E.DMS script, which exports messages and rename data from the New Release Demo database.

Properties

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

Task 2-31-7: Importing Rename Utility Data

This step runs the PUUPX98I.DMS script, which updates your Copy of Production database with messages and rename data from the New Release Demo database.

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Properties

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

Task 2-31-8: Running the Data Mover Rename Utility

This step runs the Application Engine program UPG_REN_DMS, which populates the Data Mover rename script with the commands that are appropriate for your environment. The UPG_REN_DMS Application Engine program validates the rename candidates and only those objects that actually need renaming are written to the rename Data Mover script. The generated Data Mover rename script is RNUPGRCDFLD.DMS.

Properties

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

Task 2-31-9: Reviewing the Data Mover Rename Utility Output

The Application Engine program UPG_REN_DMS populated the RNUPGRCDFLD.DMS script with the renames specific to your environment. Review the log file generated by UPG_REN_DMS and analyze the generated scripts to familiarize yourself with the renames that will be executed during the upgrade. You will want to see how many Data Mover renames were written to the rename Data Mover script. Depending on your environment and old release patch level, you may not see any renames written to a rename script.

Properties

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

Task 2-31-10: Running the Data Mover Rename Script

This step runs RNUPGRCDFLD.DMS, which renames the record and field definitions in PeopleSoft Application Designer and then logs an entry on the table PSOBJCHNG. This process also changes all references to these objects in pages and PeopleCode. This will not rename the objects on the database tables at this time.

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Properties

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

Task 2-31-11: Retaining the Target Rename Log Files

To retain a copy of the log files for the preceding rename script step run against the Copy of Production database, you must save the logs for those steps with new file names. Otherwise, these logs will be overwritten by the following rename script step run against the Copy of Current Demo database.

Properties

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

Task 2-31-12: Running Data Mover Renames on Copy of Current Demo

This step runs RNUPGRCDFLD.DMS against your Copy of Current Demo database. This is to ensure that the renames are not falsely flagged as a customization when performing the subsequent UPGCUST compare.

Properties

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

Task 2-32: Comparing Customizations

This section discusses:

- Understanding the UPGCUST Compare
- Running the UPGCUST Compare
- Running the UPGCUST Filter Script
- Reviewing the UPGCUST Compare Log
- Restoring the Copy of Current Demo

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Understanding the UPGCUST Compare

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

Task 2-32-1: 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:

- Feed categories
- Feed data types
- Feed definitions
- File reference type codes
- IB queues
- Java portlet user preferences
- Message catalog entries
- Messages
- Message schemas
- Portal registry user favorites
- Portal registry user home pages
- Related content layouts
- Related content service configurations
- Related content service definitions
- Related content services
- 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. Feed objects may not be comparable on the old PeopleSoft PeopleTools release and are compared later in the upgrade.

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Properties

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

Task 2-32-2: 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 2-32-3: Reviewing the UPGCUST Compare Log

In this step, you 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.

When you ran the compare between your production database and your old release demo, these objects were added to the UPGCUST project as customizations. When this project is compared to the new release, you will have the option to keep or delete these objects. For your existing custom profiles and web documents to work in the upgraded database, you must preserve these objects by choosing to keep them during the comparison phase.

Properties

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

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Task 2-32-4: Restoring the Copy of Current Demo

Restore your Copy of Current Demo database from the backup made earlier in the upgrade. The backup was made before rename scripts ran against the Copy of Current Demo. This is done to restore the environment to an Oracle-delivered demo implementation. If no rename scripts were run against the Copy of Current Demo, then skip this step since no changes were made to the database.

Properties

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

Task 2-33: Preparing for the Application Upgrade

This section discusses:

- Creating a Copy of RecField Definitions
- Creating a Copy of DbField Definitions
- Loading the Alter Analyzer Data
- Deleting Old Pagelet Wizard Data

Task 2-33-1: 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 you applied. The script name is:

`PUUPX07.DMS`

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

Properties

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

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Task 2-33-2: Creating a Copy of DbField Definitions

This step runs a script to save a copy of the table PSDBFIELD as PSDBFIELD_TMP. PSDBFIELD_TMP will be used during ChartField configuration to refer to field properties that existed prior to the upgrade. The script name is:

`PUEPFAZ41.DMS`

Properties

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

Task 2-33-3: 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 2-33-4: Deleting Old Pagelet Wizard Data

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

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 PeopleSoft 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.

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

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- Your current production application release database is *already* on PeopleTools 8.46 or later.
- The table PS_EOPPB_LINKPATHS 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 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 field value 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 2-34: 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

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Chapter 3

Applying PeopleTools Changes

This chapter discusses:

- Understanding PeopleTools Changes
- Verifying the Upgrade User
- Performing Script Modifications
- Preparing for the DB2 Data Type Conversion
- 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
- Converting DB2 Data Types
- Loading Base Data
- Loading Language Data
- Loading PeopleTools Data
- Loading PeopleTools Definition Group
- Compiling Directive PeopleCode
- 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 Oracle Time Data Types
- Backing Up After the PeopleTools Upgrade
- Configuring the Scheduler and Server

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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.

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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 product information for PeopleTools: 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
- Copying the Materialized View Scripts
- Copying the PTDDLUPG Script
- Editing the PTDDLUPG Script
- 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

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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_APP_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.

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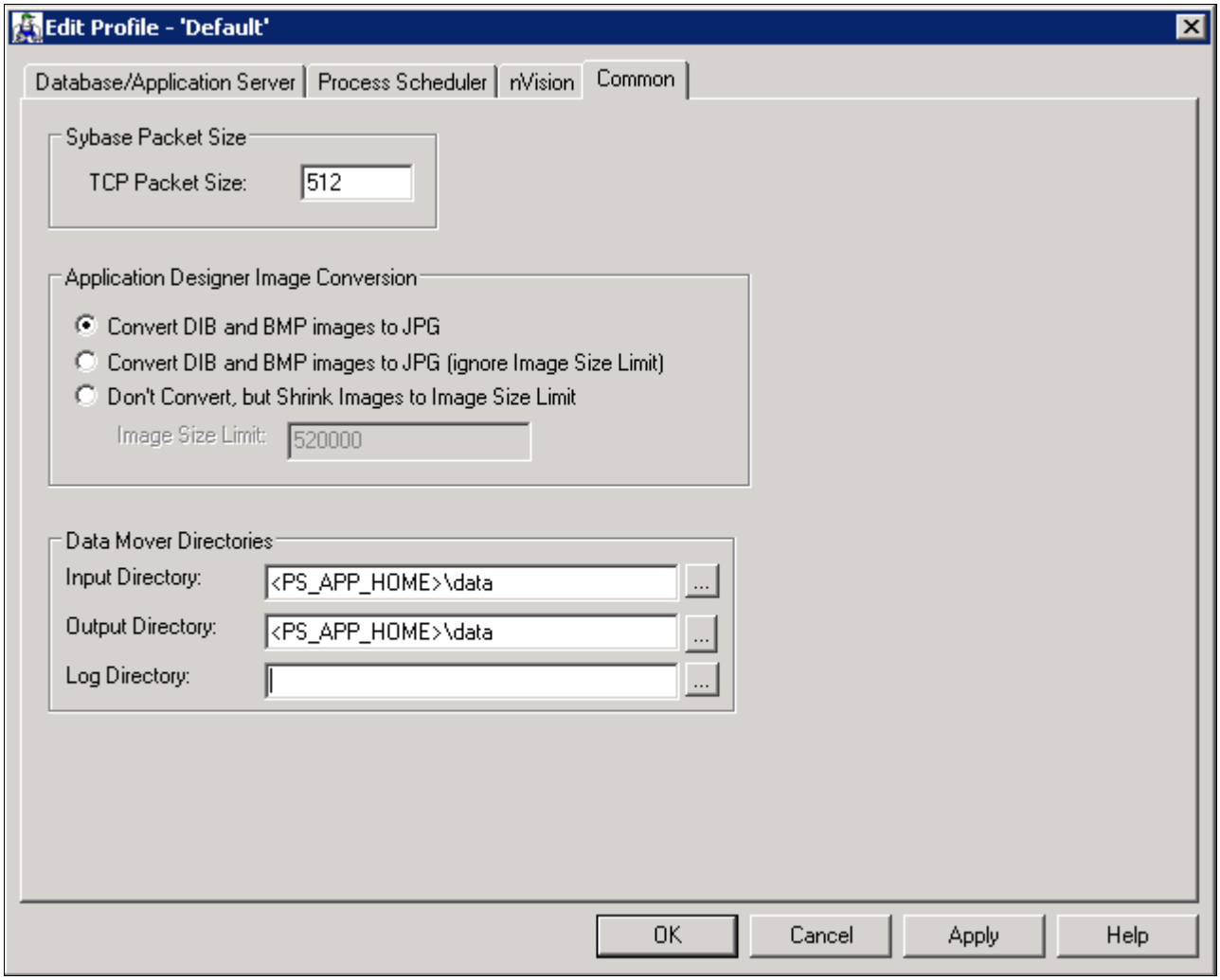
2. On the Profile tab, select the Default profile, click Edit, and select the Common tab.
   The following is an example of the Common tab.



Edit Profile - Default dialog box: Common tab

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

---

3. The value in the Log Directory field 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

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Task 3-2-2: Copying the Materialized View Scripts

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or earlier.

In this step, you copy the UPGGRANT.SQL script to the *PS_HOME*\SCRIPTS directory. If you are an Oracle/UNIX customer, transfer the file from the UNIX file server *(PS_HOME/*SCRIPTS/UNIX) to your Windows file server *PS_HOME*\SCRIPTS directory. If you are an Oracle/NT customer, you can find the file in *PS_HOME*\SCRIPTS\NT. The UPGGRANT.SQL script assumes that you are using the PSADMIN role. If you are *NOT* using the PSADMIN role, then edit the script for the correct role name.

Additionally, copy the UTLXMV.SQL script to the *PS_HOME*\SCRIPTS directory. If you are an Oracle/UNIX customer, transfer the file from the UNIX database server ($ORACLE_HOME/rdbms/admin) to your Windows file server *PS_HOME*\SCRIPTS directory. If you are an Oracle/NT customer you can find the file at %ORACLE_HOME\rdbms\admin.

Properties

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

Task 3-2-3: Copying the PTDDLUPG Script

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or earlier.

In this step, you copy the PTDDLUPG.SQL script to the *PS_HOME*\SCRIPTS directory. If you are an Oracle/UNIX customer, transfer the file from the UNIX file server *(PS_HOME/*SCRIPTS/UNIX) to your Windows file server *PS_HOME*\SCRIPTS directory. If you are an Oracle/NT customer, you can find the file in *PS_HOME*\SCRIPTS\NT.

Properties

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

Task 3-2-4: Editing the PTDDLUPG Script

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or earlier.

In this step, you edit files depending on your database platform. Refer to the following table to determine the appropriate file to modify.

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The following table shows the database platform, script name, and step properties action:

Database Platform	Script Name	Step Properties Action
DB2 z/OS (EBCDIC)	PTDDLUPG.SQL	Do not edit
DB2 z/OS (Unicode)	PTDDLUPGU.SQL	Edit
DB2 LUW (ANSI)	PTDDLUPG.SQL	Do not edit
DB2 LUW (Unicode)	PTDDLUPGU.SQL	Edit
Informix	PTDDLUPG.SH	N/A
Oracle	PTDDLUPG.SQL	N/A

Edit the appropriate file, located at *PS_HOME*\SCRIPTS\ to add site-specific tablespace names, tablespace parameters, database names, and STOGROUPs as applicable for your database platform. PeopleSoft PeopleTools delivers new tablespaces in the new PeopleSoft release. The PTDDLUPG.SQL script builds new tablespaces as part of the upgrade, so you need to remove any tablespaces from the script that already exist in your database. Review the script with your database administrator and follow the instructions in the script for your platform.

Note. Comments in the script indicate the specific PeopleTools release in which the tablespace was introduced.

Additionally, DB2 Unicode customers will need to perform an additional task to ensure that the correct script is run by PeopleSoft Change Assistant. If the preceding table indicates that step properties need to be updated, modify the step titled Creating Tablespaces to run the PTDDLUPGU.SQL script. You can find this file in the *PS_HOME*\SCRIPTS directory. If you choose not to update the step properties, you need to rename the PTDDLUPGU.SQL script to PTDDLUPG.SQL instead.

Note. If you are an Oracle customer, you need to edit the script to ensure that all of the DDL within this script is permissible for the access ID because the PTDDLUPG.SQL script will be automatically run later in the upgrade using the access ID.

Note. If you are a DB2 z/OS customer, you need to edit the PTDDLUPG.SQL or PTDDLUPGU.SQL script generated during installation. This script needs to be placed in the *PS_HOME*\SCRIPTS directory so it can be run later during the upgrade.

See Performing Updates to PeopleTools System Tables, Updating PeopleTools System Tables.

See Performing Updates to PeopleTools System Tables, Creating Tablespaces.

See Performing Updates to PeopleTools System Tables, Creating Tablespaces for Informix.

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Properties

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

Task 3-2-5: 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 REL*xxx*DBTSFIX.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 REL*xxx*DBTSFIX.SQL script in which *xxx* represents a release number (for example, 849, 850, 851, and so on) associated with your particular path.

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 LUW DB2 z/OS	All

Task 3-2-6: Editing the DBTSFIX Output Scripts

Edit the generated REL*xxx*DBTSFIX 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.

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Note. If you are a DB2 z/OS customer, when you upgrade 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, PSIMGR, and PSIMAGE2 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, PSIMGR, or PSIMAGE2 in the upgrade scripts are the exception to this approach. Note that Oracle has reassigned some tables to PSIMAGE2 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, PSIMGR, or PSIMAGE2 with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool. For DB2 z/OS customers, the database name must also be replaced with the value corresponding to the tablespace that you are using.

Properties

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

Task 3-2-7: 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 3-2-8: Editing the PTxxxTLS Scripts

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

To edit the PT*xxx*TLS scripts:

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

   PT*xxx*TLS.DMS
   PT*xxx*TLS*yyy*.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:

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```
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 3-2-9: 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 PeopleSoft Change Assistant, highlight the step and select Edit, Stop from the menu bar.

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Properties

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

Task 3-2-10: 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 PSTEMPTBLCNTVW` 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`

`MVCGGLZ25I.DMS`

`MVEP90IMP.DMS`

If you prefer, you can copy these overrides from the *xx*DMODBO.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 documentation for PeopleTools: 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

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Task 3-2-11: 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 3-2-12: Editing the DDL Parameters

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

Script	Platform
DDLDB2.DMS	DB2 z/OS
DDLDBX.DMS	DB2 LUW
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.

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Properties

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

Task 3-2-13: 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\PTUPGIBDEL8*xx*.SQL in which *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading, as determined in step 1.

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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 3-2-14: 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

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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., PATCH852).

   85*X* 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*).

      85*X* 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

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Task 3-2-15: 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:

- `EPDDL.SQL` for Oracle or DB2 z/OS ANSI
- `EPDDLU.SQL` for DB2 z/OS Unicode
- `EPDDLDMS.SQL` for DB2 UNIX/NT ANSI
- `EPDDLDMSU.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 LUW DB2 z/OS	All

Task 3-2-16: 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:

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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 3-3: Preparing for the DB2 Data Type Conversion

This section discusses:

- Understanding the Conversion Preparation
- Editing the DB2 Data Type Conversion Script
- Running the DB2 Data Type Length Audit
- Reviewing the Initial Audits Before DB2 Conversion

Understanding the Conversion Preparation

In this task, you perform steps to prepare for the DB2 LOB data type conversion. You will edit scripts needed for the conversion, run audits to review data integrity for the conversion, and fix issues reported by the audits.

PeopleSoft Change Assistant will display the steps in this task only if you are upgrading from PeopleSoft PeopleTools 8.52 or earlier.

Task 3-3-1: Editing the DB2 Data Type Conversion Script

Edit the following SQL scripts and make the necessary modifications as documented in the script for the OWNERID:

`PTDB2LOBPOSAUDIT.SQL`

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-3-2: Running the DB2 Data Type Length Audit

This step runs LOBPRAUD.SQR, which lists the tables and fields where the average data length of the field in the table exceeds the PeopleSoft-defined field length of the Long Character field type.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-3-3: Reviewing the Initial Audits Before DB2 Conversion

Examine the log file from the previous step "Running the DB2 Data Type Length Audit." It contains a list of columns on tables where the average data length of the field in the table exceeds the PeopleSoft-defined field length of the Long Character field type. Fix the data contained in each field listed so that it is shorter than the PeopleSoft-defined field length before proceeding with the upgrade. After fixing the data, you may rerun all of the steps in this task to rerun this audit.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-4: Performing Updates to PeopleTools System Tables

This section discusses:

- Understanding Updating PeopleTools System Tables
- Cleaning Up Message Data
- Creating Tablespaces
- Creating Tablespaces for Informix
- Updating System Catalog Views

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- Updating PeopleSoft Database Roles
- Creating the Oracle Materialized Views Table
- 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
- Enabling the DB2 CAST Function
- Rerunning Update Statistics for DB2 zOS
- Rerunning the RUNSTATS Report for DB2 LUW
- Rerunning Update Statistics for DB2 LUW
- Rerunning Update Statistics for Informix
- Rerunning Update Statistics for Oracle
- Saving Transparent Data Encryption Information
- Saving Oracle Fine Grained Auditing 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 3-4-1: Cleaning Up Message Data

This step runs PTUPGIBDEL8*xx*.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

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Task 3-4-2: Creating Tablespaces

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or earlier.

This step runs the PTDDLUPG script, which builds new tablespaces as part of the new PeopleSoft release.

Note. If you are a Unicode customer and you did not rename the PTDDLUPGU.SQL file when you edited the PTDDLUPG script, you must modify this step to run the PTDDLUPGU.SQL script. This file can be found in the *PS_HOME*\SCRIPTS directory.

See Editing the PTDDLUPG Script.

Properties

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

Task 3-4-3: Creating Tablespaces for Informix

Transfer the PTDDLUPG.SH script file to the server. Log in as the database owner (Informix user) and run PTDDLUPG.SH to create the new tablespaces. This script creates new tablespaces introduced in the new PeopleSoft release.

See Editing the PTDDLUPG Script.

Properties

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

Task 3-4-4: Updating System Catalog Views

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

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Properties

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

Task 3-4-5: Updating PeopleSoft Database Roles

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or earlier.

This step runs the UPGGRANT.SQL script as the system user, which updates the PeopleSoft PSADMIN role. The UPGGRANT.SQL script assumes that you are using the PSADMIN role.

Properties

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

Task 3-4-6: Creating the Oracle Materialized Views Table

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or earlier.

This step runs the Oracle RDBMS script UTLXMV.SQL, which creates the MV_CAPABILITIES_TABLE for Materialized Views.

Properties

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

Task 3-4-7: 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, REL*xxx*.SQL, in which *xxx* designates a PeopleSoft PeopleTools release number.

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

If you created `REL`*`xxx`*`DBTSFIX` (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 `REL`*`xxx`*`DBTSFIX`. If you did not run `DBTSFIX`, PeopleSoft Change Assistant will run `REL`*`xxx`*.

Note. This step runs at least one script. Do not proceed to the next step until these scripts run successfully.

See the product documentation for PeopleTools: PeopleSoft Change Assistant and Update Manager for your new release.

Properties

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

Task 3-4-8: 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 3-4-9: 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

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Task 3-4-10: 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 you installed and *DBplatform* represents the database platform using the following chart:

Database Platform	Code Used
Microsoft SQL Server	MSS
DB2 z/OS	DB2
DB2 LUW	DBX
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 3-4-11: 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.

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Properties

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

Task 3-4-12: 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 3-4-13: 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 3-4-14: 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 your changes to the PeopleSoft PeopleTools objects.

The script name for your upgrade path is:

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MVPRDEXP.DMS

Properties

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

Task 3-4-15: 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 3-4-16: Enabling the DB2 CAST Function

This step runs UPGDB2DBOPTIONS_ENABLE.SQL, which updates the database to enable the conversion of the LONG VARCHAR FOR BIT DATA data type to the BLOB data type. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.52 or earlier.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 3-4-17: 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-4-18: Rerunning the RUNSTATS Report for DB2 LUW

This script creates the RUNSTATS.DAT file for the script to update the statistics for DB2 LUW.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-4-19: Rerunning Update Statistics for DB2 LUW

Earlier in the upgrade process, you updated your statistics for DB2 LUW. 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 3-4-20: 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-4-21: 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-4-22: 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.

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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 "Complete Database Changes," Enabling Oracle Transparent Data Encryption.

Properties

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

Task 3-4-23: Saving Oracle Fine Grained Auditing Information

If you have implemented Oracle's Fine Grained Auditing (FGA) feature on PeopleSoft tables, disable it for the duration of the upgrade to improve upgrade performance.

To disable Fine Grained Auditing:

1. Run *PS_HOME*\SCRIPTS\PREUPGFGAREPORT.SQL. This script reports on the current (pre-upgrade) FGA policies stored in USER_AUDIT_POLICIES, detailing all columns by table for all tables with FGA policies. Keep this report to use at the end of the final pass of the upgrade.
2. Run *PS_HOME*\SCRIPTS\PREUPGFGAPROCESS.SQL. This script generates the scripts PSCREATEFGA.SQL and PSDISABLEFGA.SQL.
3. Run the generated PSDISABLEFGA.SQL to disable FGA polices.

You will run the generated PSCREATEFGA.SQL script at the end of the final pass of the upgrade. Do not run it at this time.

See the product documentation for PeopleTools: Data Management for your new release for more information about administering PeopleSoft databases on Oracle.

See "Completing Database Changes," Enabling Oracle Fine Grained Auditing.

Properties

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

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Task 3-5: 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 only executed during the initial pass and the feature is only disabled for the initial pass.

See "Complete Database Changes," Reviewing Change Control.

Properties

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

Task 3-6: Loading Model Definition Data

This section discusses:

- Understanding Loading Model Definition Data
- Loading Model Definitions for DB2 zOS
- Loading Model Definitions for DB2 LUW
- 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 3-6-1: Loading Model Definitions for DB2 zOS

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

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Properties

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

Task 3-6-2: Loading Model Definitions for DB2 LUW

This step runs the DDLDBX.DMS script to populate DDL model definitions for DB2 LUW.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-6-3: 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 3-6-4: 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 3-6-5: Loading Model Definitions for Microsoft

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

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Properties

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

Task 3-6-6: 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 3-7: 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 3-8: Reviewing PeopleTools Objects

Run this step to identify any PeopleSoft PeopleTools objects that you have customized. This step 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 PeopleSoft PeopleTools objects that make up a product like Security.

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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 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 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. On the Report Options tab, deselect the Generate Output to Tables check box.
9. On the Report Filter tab, click Default.

   This will cause only customizations to appear on the compare reports.
10. Click OK.
11. Click Compare to start the compare process.
12. 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 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.

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Properties

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

Task 3-9: 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 product documentation for PeopleTools: PeopleSoft Application Designer Developer's Guide for your new release.

Task 3-9-1: 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.

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

```
Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: OBJECTNAME not copied, entire definition already opied.
```

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

Properties

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

Task 3-9-2: 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. Oracle delivers the PPLTLS84CURML project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels. When the upgrade process detects that a given field does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following example:

```
Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: OBJECTNAME not copied, entire definition already copied.
```

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

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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 3-9-3: 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. Oracle delivers the PPLTLSML project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following examples:

```
Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: OBJECTNAME not copied, entire definition already copied.
```

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

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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 3-9-4: 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.

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Properties

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

Task 3-9-5: 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 3-9-6: 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

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Task 3-10: Populating Tablespace Data

This section discusses:

- Creating Application Tablespaces
- Creating Application Tablespaces for Informix
- Populating Updated Tablespace Data
- Creating the DB2 Tablespace Audit Project
- Auditing DB2 Tablespace Assignments
- Updating Tablespace Names
- Updating DB2 Tablespace Assignments

Task 3-10-1: 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 LUW DB2 z/OS	All

Task 3-10-2: 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:

```
EPDDL.SH
```

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

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Properties

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

Task 3-10-3: 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-10-4: Creating the DB2 Tablespace Audit Project

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or higher.

This step creates the empty project PTUPGLOBDB2TS. This project will be populated in the next step, Auditing DB2 Tablespace Assignments, which runs the LOBDB2TS.SQR.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-10-5: Auditing DB2 Tablespace Assignments

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.53 or higher.

This step runs LOBDB2TS.SQR, which audits the tablespace information stored in the PeopleSoft system for records with Long, Image, or Attachment fields to make sure the tablespace has a sufficiently large page size. LOBDB2TS.SQR reports on any records in a tablespace with an insufficiently sized page size as well as any such records assigned to a nonexistent tablespace. Any problematic records are automatically reassigned to the PSIMAGE2 tablespace in the PeopleSoft PeopleTools metadata after running the SQR. These records are also inserted into the PTUPGLOBDB2TS project. If there are no records fitting this criteria, then both the SQR report and the project will be empty.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-10-6: Updating Tablespace Names

The SETSPACE SQR script identifies the tables with an invalid tablespace or 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. For DB2 z/OS, 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.

Additionally, if you are upgrading from 8.53 or higher on DB2 LUW, review the output from the LOBDB2TS.SQR script in order to review the reassignment of any PeopleTools records with Long, Image, or Attachment field types to a tablespace with a sufficiently large page size. Any problematic records reported by the SQR were inserted into the PTUPGLOBDB2TS project for your convenience and automatically reassigned to the PSIMAGE2 tablespace. If there are no records fitting this criteria then both the SQR report and the project will be empty.

To correct the database and/or tablespace names use one of the following options:

- Generate the alter/create scripts and globally edit the scripts, changing the database/tablespace values to those

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of your Copy of Production.

- 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.

Note. You will re-run the LOBDB2TS.SQR later in the upgrade. If you want to preserve the log files or the PTUPGLOBDB2TS project generated by PeopleSoft Change Assistant from this run, you will need to rename the files or project manually after completing this step.

Properties

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

Task 3-10-7: Updating DB2 Tablespace Assignments

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.52 or earlier.

This step runs LOBEXAUD.SQR, which audits the tablespace information stored in the PeopleSoft system and, if needed, reassigns records to a platform-specific tablespace with a sufficiently large page size and buffer pool size. This is to ensure the success of any subsequent steps to create or alter tables. Tables that are updated will be reassigned to the PSIMAGE2 tablespace. LOBEXAUD.SQR reports on the old tablespace name and the table/record name for the records that are updated by the audit program.

See "Converting DB2 Data Types," Understanding the DB2 Data Type Conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 3-11: Building the Updated PeopleTools Project

This section discusses:

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

Task 3-11-1: 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 3-11-2: 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 LUW Informix Oracle	All

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Task 3-11-3: 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 3-12: 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. Prior to starting this task, you may find it useful to compare the PT84TBLSPC project to find out which tables were assigned to a different tablespace in the new release.

Task 3-12-1: 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.

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Properties

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

Task 3-12-2: 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 LUW Informix Oracle	All

Task 3-12-3: 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.

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Properties

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

Task 3-12-4: 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 LUW Informix Oracle	All

Task 3-13: Converting DB2 Data Types

This section discusses:

- Understanding DB2 Data Type Conversion
- Copying the DB2 Data Type Conversion Script
- Creating the DB2 Conversion Project
- Populating the DB2 Conversion Project
- Generating DB2 Conversion Scripts
- Editing DB2 Conversion Scripts
- Altering DB2 Conversion Tables
- Creating DB2 Conversion Indexes
- Creating DB2 Conversion Triggers
- Auditing After the DB2 Conversion
- Reviewing DB2 Conversion Reports
- Disabling the DB2 CAST Function

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Understanding DB2 Data Type Conversion

As of PeopleSoft PeopleTools 8.53, LOB data types, as well as a length threshold for Long Character fields, are now supported on DB2 LUW. The data types as defined in PeopleSoft Application Designer are not changed; only the database-level definition will be different.

PeopleSoft Change Assistant will display the steps in this task only if you are upgrading from PeopleSoft PeopleTools 8.52 or earlier.

The following table lists DB2 LUW non-Unicode data types that are available as of PeopleSoft PeopleTools 8.53:

PS Field Type	Current Data Type	Data Type as of PeopleTools 8.53
Long Character (0)	LONG VARCHAR	CLOB
Long Character (n) n > 0, n<=2000	LONG VARCHAR	VARCHAR(n)
Image	LONG VARCHAR FOR BIT DATA	BLOB
Attachment	LONG VARCHAR FOR BIT DATA	BLOB

The following table lists DB2 LUW Unicode data types that are available as of PeopleSoft PeopleTools 8.53:

PS Field Type	Current Data Type	Data Type as of PeopleTools 8.53
Long Character (0)	LONG VARGRAPHIC	DBCLOB
Long Character (n) n > 0, n<=4000	LONG VARGRAPHIC	VARGRAPHIC(n)
Image	LONG VARCHAR FOR BIT DATA	BLOB
Attachment	LONG VARCHAR FOR BIT DATA	BLOB

Task 3-13-1: Copying the DB2 Data Type Conversion Script

During Move to Production passes, copy PTUPGDB2LOBCONV_ALTER.SQL, PTUPGDB2LOBCONV_INDEX.SQL, and PTUPGDB2LOBCONV_TRIGGER.SQL from the output directory of your initial pass and place them into the output directory for your Move to Production pass. These scripts are only generated during the initial pass.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	DB2 LUW	All

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Task 3-13-2: Creating the DB2 Conversion Project

In this step, you create an empty PTUPGDB2LOBCONV project. This project will be used in the data type conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	DB2 LUW	All

Task 3-13-3: Populating the DB2 Conversion Project

This step runs PTUPGDB2LOBCONV.SQL, which populates the PTUPGDB2LOBCONV 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	DB2 LUW	All

Task 3-13-4: Generating DB2 Conversion Scripts

This step builds the PTUPGDB2LOBCONV project and generates the SQL scripts PTUPGDB2LOBCONV_ALTER.SQL, PTUPGDB2LOBCONV_INDEX.SQL, and PTUPGDB2LOBCONV_TRIGGER.SQL. The generated scripts will alter tables and re-create indexes and triggers for tables in the PTUPGDB2LOBCONV project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	DB2 LUW	All

Task 3-13-5: Editing DB2 Conversion Scripts

In this step, you edit the DB2 conversion scripts for tablespace names and sizing. If you are not using the PeopleSoft tablespace names, you need to review and modify the script created previously in the step "Generating DB2 Conversion Scripts." 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 pass.

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The script names for your upgrade path are:

```
PTUPGDB2LOBCONV_ALTER.SQL
PTUPGDB2LOBCONV_INDEX.SQL
PTUPGDB2LOBCONV_TRIGGER.SQL
```

In a Move to Production pass, you may encounter errors with dropping nonexistent temporary tables if the number of temporary table instances for a specific record decreased between passes. Modify the alter script as needed to remove any extra temporary table instances.

Ensure that all corresponding LOB tablespaces exist, or reassign to another tablespace as needed. When the conversion scripts are generated, PeopleTools assumes that the matching LOB tablespaces exist for the base tablespace.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-13-6: Altering DB2 Conversion Tables

This step runs the PTUPGDB2LOBCONV_ALTER.SQL script. This will alter the existing tables to use the new data types.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-13-7: Creating DB2 Conversion Indexes

This step runs the PTUPGDB2LOBCONV_INDEX.SQL script. This will re-create the indexes for the tables being altered in the DB2 data type conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 3-13-8: Creating DB2 Conversion Triggers

This step runs the PTUPGDB2LOBCONV_TRIGGER.SQL script. This will re-create the triggers for the tables being altered in the DB2 data type conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-13-9: Auditing After the DB2 Conversion

This step runs the PTDB2LOBPOSAUDIT.SQL script that you created earlier in the upgrade. This audit verifies that all of the old data types were converted from LONG VARCHAR/LONG VARGRAPHIC to the new data types CLOB/DBCLOB/BLOB. It also verifies if any Long Character field in PSDBFIELD with a length less than documented MAXLENGTH was converted to VARCHAR(n)/VARGRAPHIC(n). This audit will go against system catalog for every single record in PSRECDEFN of type table and temporary table. For each of these records, it will check if any column refers to the old data type. If it finds any table with old data types, it will add that record/table name and the column name to the report.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-13-10: Reviewing DB2 Conversion Reports

Examine the log file from the step "Auditing After the DB2 Conversion." The file contains a list of unconverted columns on tables and any unresolved errors from the step "Altering DB2 Conversion Tables," "Creating DB2 Conversion Indexes," and "Creating DB2 Conversion Triggers." If you are using these tables, you can update them manually to use the new data types with an ETL or SQL query tool. Be very cautious when changing a table because this could result in data loss or affected functionality. 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.

Note. During Move to Production passes, you must manually convert any remaining objects. Also, the record definition differs from the database table structure during Move to Production passes, so do not build the record with PeopleSoft Application Designer. During a Move to Production pass, if new tables show up in the audit that are due to record definition changes in the new release, you can ignore those at this time, rerun the audit after finishing the "Applying Application Changes" chapter, and correct any issues at the end of the upgrade.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-13-11: Disabling the DB2 CAST Function

This step runs UPGDB2DBOPTIONS_DISABLE.SQL, which resets the database setting to use the LOB data types.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 3-14: 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 PT*xxx*TLS.DMS and PT*xxx*TLS*yyy*.DMS naming conventions that are greater than your current PeopleSoft PeopleTools release, where *xxx* represents a PeopleSoft PeopleTools release number and *yyy* represents a three-letter language code. 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 3-15: Loading Language Data

This section discusses:

- Populating the Language Table
- Loading the Language Data

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Task 3-15-1: 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 3-15-2: 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 3-16: Loading PeopleTools Data

This section discusses:

- Loading Noncomparable Objects
- Loading English Messages
- Loading English String Data
- Loading Stored Statements Data
- Resetting the File Processing Functionality

Task 3-16-1: 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.

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Properties

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

Task 3-16-2: Loading English Messages

This script loads English messages into your database.

Properties

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

Task 3-16-3: 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 3-16-4: Loading Stored Statements Data

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

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

Properties

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

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Task 3-16-5: Resetting the File Processing Functionality

This step runs the PTFX_LIBON.DMS script, which resets the File Processing mode to the default value.

Properties

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

Task 3-17: Loading PeopleTools Definition Group

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

Properties

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

Task 3-18: Compiling Directive PeopleCode

PeopleSoft Change Assistant will display this task only if you are upgrading from PeopleSoft PeopleTools 8.53.

This task compiles all directive PeopleCode

Properties

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

Task 3-19: Converting PeopleTools Objects

This section discusses:

- Updating the REN Server Configuration

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- Populating MCF Data
- Converting Portal Objects
- Converting Query Prompt Headings
- Encrypting Connector Passwords
- Loading Conversion Data
- Reporting Conversion Details
- Running PeopleTools Data Conversion

Task 3-19-1: 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. 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/* APPSERV/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 3-19-2: 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. Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

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Properties

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

Task 3-19-3: 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 Iscript URLs. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

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

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

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

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

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

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

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

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

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

See the product documentation for PeopleTools: PeopleTools Portal Technologies for your new release.

Properties

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

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Task 3-19-4: 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 manually change the heading. In these cases, the following error is written to the log file:

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

See the product documentation for PeopleTools: PeopleSoft Query for your new release.

Properties

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

Task 3-19-5: 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 3-19-6: Loading Conversion Data

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

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Properties

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

Task 3-19-7: 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 3-19-8: Running PeopleTools Data 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 the group number of 01 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. After running PTUPGCONVERT, review the output data generated in the previous step for more details.

Properties

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

Task 3-20: Creating PeopleTools Views

This section discusses:

- Creating Updated PeopleTools Views

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Task 3-20-1: Creating Updated PeopleTools Views

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

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-21: 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 3-21-1: Updating Integration Broker Defaults

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

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Properties

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

Task 3-21-2: 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 3-21-3: Saving Application Messaging Objects

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

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

Properties

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

Task 3-21-4: Exporting Node Transactions

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

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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 3-21-5: 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 3-21-6: Deleting Application Messaging Objects

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

Properties

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

Task 3-21-7: 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.

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Properties

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

Task 3-22: 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 3-23: 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 3-24: 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.

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Properties

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

Task 3-25: 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 wish to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to manually rename the files after completing this task.

Properties

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

Task 3-26: 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

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- 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 and higher, 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 3-26-1: 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

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Task 3-26-2: 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 3-26-3: 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 3-26-4: 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.

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Important! During Move to Production passes, copy the DROPINDEXESn.SQL, ALTERTIMESTAMPSn.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.

You must manually convert any objects that are missed by the conversion; for example, those due to maintenance on records applied on the old release.

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.

Note. When setting environment variables or directories to reference paths, if any of your paths contain spaces, they will need to be wrapped in double quotes; for example, SET PS_HOME = "PS_HOME_location".

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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 as the upgrade template is set up to run 8 sets of scripts. If you choose a different number, then you will need to modify the upgrade template and either remove the steps corresponding to the extra scripts, or add additional steps to run the additional scripts.
- ORACLEVERSION: The version of Oracle Connectivity that you are using (11 or 12).

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

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- 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
- ALTERTIMESTAMPSn.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 3-26-5: 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

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Task 3-26-6: 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 3-26-7: 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 3-26-8: 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 3-26-9: 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.

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Properties

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

Task 3-26-10: 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 3-26-11: 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 3-26-12: 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.

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Properties

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

Task 3-26-13: Running Alter Timestamps Script 1

This step runs ALTERTIMESTAMPS1.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 3-26-14: Running Alter Timestamps Script 2

This step runs ALTERTIMESTAMPS2.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 3-26-15: Running Alter Timestamps Script 3

This step runs ALTERTIMESTAMPS3.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.

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Properties

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

Task 3-26-16: Running Alter Timestamps Script 4

This step runs ALTERTIMESTAMPS4.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 3-26-17: Running Alter Timestamps Script 5

This step runs ALTERTIMESTAMPS5.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 3-26-18: Running Alter Timestamps Script 6

This step runs ALTERTIMESTAMPS6.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.

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Properties

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

Task 3-26-19: Running Alter Timestamps Script 7

This step runs ALTERTIMESTAMPS7.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 3-26-20: Running Alter Timestamps Script 8

This step runs ALTERTIMESTAMPS8.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 3-26-21: 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.

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Properties

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

Task 3-26-22: 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 3-26-23: 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 3-26-24: 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.

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Properties

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

Task 3-26-25: 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 3-26-26: 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 3-26-27: 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.

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Properties

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

Task 3-26-28: 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 3-27: 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 3-28: 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.

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

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

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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. Now that you have completed the PeopleTools portion of the upgrade, you must check the *Connect to Database using New PS_HOME* check box if you need to modify any of the information within the New Home part of the environment.

Properties

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

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Chapter 4

Running and Reviewing Compare Reports

This chapter discusses:

- Understanding Compare Reports
- Preparing for Application Changes
- Running the Alter Analyzer Loader
- Renaming Tables
- Copying Select 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
- Dropping Tables and Views
- Copying the UPG_CRW_DEFN Project

Task 4-1-1: Exporting Project Definitions

In this step, you export from your Demo database the project definitions that will be used later in this upgrade. This step is run in the initial and Move to Production passes; therefore, during the Move to Production pass, the export is not run against the Demo database. You will import these definitions in the next step.

The script for your upgrade is:

`DLUPX08E.DMS`

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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 import the project definitions into your Copy of Production database. These projects will be used later in this upgrade.

The script for your upgrade is:

`DLUPX08I.DMS`

Properties

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

Task 4-1-3: Dropping Tables and Views

This step will drop tables, views, or both, on the Copy of Production database. Some tables and views need to be dropped from the database prior to compare, copy, or generating DDL scripts. Some common reasons include:

- When a record was a view in a prior release and will be a table in the new release, the view must be dropped before the new tables are created.
- Records used as Application Engine state records for upgrade conversion code must exist on the database as an exact version of the record definition. You do not want these tables to be altered without deleting the obsolete columns. To make that happen, drop the table on the database at this point in the upgrade.
- Some records that have many fields and long row lengths will exceed database limitations if they are altered without deleting obsolete columns. If the table is considered a "temporary" table for batch processing, Oracle assumes that it will contain no relevant data at this point in the upgrade process. Dropping the table at this point in the upgrade will eliminate the row length problems that could occur later in the upgrade.

If for some reason any of these tables or views do not exist in your database, and you receive SQL errors, that is acceptable and you can proceed with your upgrade.

The script name for your upgrade path is:

`DLEPUPV07.DMS`

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Properties

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

Task 4-1-4: Copying the UPG_CRW_DEFN Project

If you are preserving Crystal process definitions, you automated this step earlier in the upgrade. This step copies the UPG_CRW_DEFN project from the Source database to the Target database. This project contains all of the objects that need to exist in the database for the UPG_CRW_DEFN Application Engine program to run properly.

See Running New Release Compare Reports, Preserving Crystal Process Definitions.

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 Renaming Tables
- Running the SQL Table Rename Utility
- Reviewing the SQL Table Rename Utility Output
- Renaming SQL Tables

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Understanding Renaming Tables

In this task you run the UPG_REN_SQL Application Engine program to generate the RNUPGTBLS.SQL rename script. You will then run the generated script to rename tables at the database level to temporary table names.

Near the end of the upgrade tasks, you run a DDDAUDIT report again. On the report, these temporary tables will be listed in the section for "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.

Task 4-3-1: Running the SQL Table Rename Utility

This step runs the Application Engine program UPG_REN_SQL, which populates the rename SQL script with the commands that are appropriate for your environment. The generated SQL rename script is RNUPGTBLS.SQL. The dependent indexes and views are also included in the SQL script, which may include custom indexes and views. The UPG_REN_SQL Application Engine program validates the rename candidates and only those objects that actually need renaming are written to the rename SQL script.

Properties

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

Task 4-3-2: Reviewing the SQL Table Rename Utility Output

The Application Engine program UPG_REN_SQL populated the RNUPGTBLS.SQL with the renames specific to your environment. Review the log file generated by the UPG_REN_SQL Application Engine program and analyze the generated scripts to familiarize yourself with the renames that will be executed during the upgrade. You will want to see how many SQL renames were written to the generated SQL. Depending on your environment and old release patch level, you may not see any renames written to a rename script.

Note. If there are no renames to be run for your upgrade path, mark the step "Renaming SQL Tables" as complete.

Note. During the Move to Production pass, verify that you have already copied the RNUPGTBLS.SQL script from the output directory of your previous upgrade pass' output into the output directory of your current pass. Modify the script as needed if there were additional record structure changes in production since starting the initial upgrade pass.

Note. For DB2 z/OS customers, edit the SQL rename script RNUPGTBLS.SQL. Uncomment and modify the set owner ID command within the script, as in the following example:

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


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Properties

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

Task 4-3-3: Renaming SQL Tables

This step runs RNUPGTBLS.SQL to rename tables at the database level to temporary table names. The script does not change the Record Definition. These temporary tables will be used in the data conversion programs in a later step.

In some database platforms, the related indexes and views must be dropped before the table can be renamed. Oracle includes drop statements for these objects in the SQL script that is generated by the rename Application Engine program UPG_REN_SQL.

Properties

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

Task 4-4: Copying Select Tables

This section discusses:

- Running the DLCGGLZ20E Script
- Running the DLCGGLZ20I Script

Task 4-4-1: Running the DLCGGLZ20E Script

The DLCGGLZ20E and DLCGGLZ20I scripts save the contents of the PSRECFIELDDB table to a temporary table (PS_FS_UPG_RECFLDDB) to be used by data conversion programs. PSRECFIELDDB is a PeopleSoft PeopleTools table that contains all records and the fields on those records. Running the DLCGGLZ20E script at this point in the upgrade preserves the prior release record/field structure in the temporary table.

Note. The export can only run during the initial test pass. It is only during the initial pass that you have old release record structures in the new release PSRECFIELDDB table. You will need to preserve the .DAT file DLCGGLZ20.DAT located in your *PS_APP_HOME*\DATA directory. It will need to exist in the *PS_APP_HOME*\DATA directory during your Move to Production passes.

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Properties

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

Task 4-4-2: Running the DLCGGLZ20I Script

The DLCGGLZ20I script imports the data into the PS_FS_UPG_RECFLDDB temporary table.

Note. The import needs to run in both the initial and Move to Production passes. The export script, DLCGGLZ20E, will only run in the initial test pass. This script requires the DLCGGLZ20.DAT file generated during the initial pass. The .DAT file should be located in your *PS_APP_HOME*\DATA directory.

Properties

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

Task 4-5: Running New Release Compare Reports

This section discusses:

- Understanding the New Release Compare
- Preserving the Local Message Node
- Preserving Crystal Process Definitions
- Comparing Converted New Release Objects
- Running the New Release UPGCUST Compare
- Creating the UPGIB Project
- Resetting Flags for ChartField Objects

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 4-5-1: 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.

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Properties

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

Task 4-5-2: Preserving Crystal Process Definitions

If you are preserving Crystal process definitions, you automated this step earlier in the upgrade. This step runs the UPG_CRW_DEFN Application Engine program, which adds all Crystal process definitions to the UPGCUST project. After executing the step "Running the New Release UPGCUST Compare" later in the upgrade, you will review the compare output and determine which Crystal process definitions you would like to preserve in order to continue to use any custom or deprecated Crystal reports.

Properties

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

Task 4-5-3: Comparing Converted New Release Objects

This step populates the UPGCUST project with object types that previously existed as non-comparable system data in the old release and are now comparable in the new release. They are marked **Changed* or **Unchanged* in your Copy of Production environment. Only custom objects should remain in the UPGCUST project.

This step compares the following object types:

- Feed category
- Feed data type
- Feed definition

Properties

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

Task 4-5-4: Running the New Release UPGCUST Compare

This step executes a project compare of comparable objects in the UPGCUST project.

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Properties

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

Task 4-5-5: 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 4-5-6: Resetting Flags for ChartField Objects

This step turns on Take Action flags in the UPGCUST project for objects modified by the ChartField Configuration process. If you have added a new ChartField, you need to review and adjust the flags for all the new objects you have created to support the new ChartField, such as records, views, pages, and components. The script below sets the flag for most of those objects, but you may have used a different name than expected. If you have not added a new ChartField, but have relabeled, resized, renamed, activated, or inactivated a delivered ChartField, the script below will include all those objects and no additional action is required.

The script for your upgrade is:

`DLEPFAZ01.DMS`

Properties

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

Task 4-6: Reviewing New Release Compare Reports

This section discusses:

- Reviewing New Release Changes

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- Reviewing Additional Upgrade Projects

Task 4-6-1: Reviewing New Release Changes

In this step, you analyze the UPGCUST project and related compare reports. Select the Upgrade flags for the customizations that 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 Release Notes for the product 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 4-6-2: 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 that you wish to retain.

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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 the 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

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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
- Copying Application EDI Statements
- Configuring ChartFields
- Modifying Trigger Tables
- Preparing for Data Conversion Analysis
- 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
- Loading Data to Complete System Setup
- Loading Stored Statements
- Running Final Update Statistics
- Updating Language Data
- Completing the PeopleTools Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports
- Restoring the New Release Demo

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.

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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
- 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`

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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 selected for those objects that you expected to be copied.

There are many different types of errors that 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 deselect 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 that 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
```

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Properties

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

Task 5-1-5: 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 5-1-6: 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`

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Properties

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

Task 5-1-7: 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 5-1-8: Copying the UPGNONCOMP Project

In this step, copy the non-compare project, UPGNONCOMP. This project consists of object types that you cannot compare and object types that are 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 that you did not want to copy.

Properties

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

Task 5-1-9: 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 selected for the objects in each of the projects.

There are many different types of errors that you can find in the copy logs, depending on which objects you chose to copy or not copy. Review any errors that you received during the copy process to determine whether they are acceptable cases or unacceptable errors that need corrective action.

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Properties

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

Task 5-1-10: 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 5-1-11: 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 5-1-12: 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.

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Properties

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

Task 5-2: Updating Database Overrides

This section discusses:

- Setting Index Parameters After Copy
- Setting Tablespace Names After Copy
- Creating New Tablespaces

Task 5-2-1: Setting Index Parameters After Copy

This step updates index overrides stored in the PSIDXDDLPARM 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	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.

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Properties

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

Task 5-2-3: Creating New Tablespaces

This section discusses:

- Creating Delivered Tablespaces
- Creating Custom Tablespaces

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 of the tablespaces listed on the report as missing on the database. Once you create all of the tablespaces, you can rerun the SETSPACE.SQR; the report should show that no additional modifications are needed.

Oracle delivered a shell SQL script containing the DDL commands to create all of the delivered tablespaces. Edit the script to create just the new tablespaces and to set up the script for your environment.

The script name is:

`EPDDL.SQL`

Note. For DBX sites, create all of the tablespaces on the report listed as missing on the database in addition to the corresponding index (IDX) tablespace.

Note. For DB2 z/OS, some tables were reassigned to larger tablespaces because they now require a 32K bufferpool. 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 32K bufferpool.

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'
```


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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_APP_HOME*\SCRIPTS directory that you use during the Move to Production pass.

See Enterprise PeopleTools Installation for DB2 for z/OS, Correcting Invalid Database/Tablespace Combinations information, for your new release.

See Editing the Create and Alter Scripts and Setting Tablespace Names.

See "Applying PeopleTools Changes," Populating Tablespace Data.

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See "Apply Changes to 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 LUW	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

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Task 5-4: Copying Application 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 5-5: Configuring ChartFields

This section discusses:

- Understanding ChartFields
- Updating Inactive ChartFields
- Building the UPG_CF_CONFIG Script
- Running the UPG_CF_CONFIG Script
- Building the UPG_CF_RENAME Script
- Running the UPG_CF_RENAME Script
- Exporting Configuration Defaults
- Importing Configuration Defaults
- Running the Configuration by Project Process
- Updating Asset Management ChartField SQC
- Exporting ChartField Configuration Data
- Importing ChartField Configuration Data

Understanding ChartFields

In this task, you apply your existing ChartField configuration to the new PeopleSoft objects that have been copied into your database. You accomplish this by running the Configuration by Project process. The process dynamically creates the project UPG_CFDBCOMP containing the new objects, and uses this project in running ChartField Configuration by Project.

Since this task simply applies your existing configuration actions with a status of *Complete* to the new objects, you will also need to run the Full Configuration process after completing the upgrade, in the following cases:

- You need to make changes to your current PeopleSoft ChartField configuration that did not exist in the previous release (for example, activate an additional ChartField, or relabel a ChartField).

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- You have licensed new products and you have not yet run the Full Configuration process to configure those products.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for information about configuring ChartFields.

Task 5-5-1: Updating Inactive ChartFields

This step updates the PSDBFIELD table to reflect which ChartFields were previously active or inactive in your Copy of Production database before the upgrade.

The script name is for your upgrade is:

`DLEPFAZ40.DMS`

Properties

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

Task 5-5-2: Building the UPG_CF_CONFIG Script

This step generates the UPG_CF_CONFIG.SQL script that contains SQL to alter existing tables. This SQL will create and alter tables, and create views.

Properties

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

Task 5-5-3: Running the UPG_CF_CONFIG Script

In this step, you run the UPG_CF_CONFIG.SQL script generated in the previous step.

Properties

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

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Task 5-5-4: Building the UPG_CF_RENAME Script

This step generates the UPG_CF_RENAME.SQL script that contains SQL to alter existing tables. This SQL will create and alter tables, and create views.

Properties

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

Task 5-5-5: Running the UPG_CF_RENAME Script

In this step, you run the UPG_CF_RENAME.SQL script generated in the previous step.

Properties

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

Task 5-5-6: Exporting Configuration Defaults

This script exports ChartField configuration data from the Demo database. This data is considered system data that is needed for the ChartField configuration steps that follow. The script name for your upgrade path is:

`DLCGFAZ19E.DMS`

Properties

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

Task 5-5-7: Importing Configuration Defaults

This script imports the ChartField configuration data into the Copy of Production database. The script name for your upgrade path is:

`DLCGFAZ19I.DMS`

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Properties

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

Task 5-5-8: Running the Configuration by Project Process

This step runs the Application Engine process UPG_CFCONFIG. This process applies all existing ChartField configuration actions on the FS_CF_PROD_LOG table with a CF_STATUS of *C* (Complete) to the objects in the UPG_CFDBCOMP project. The UPG_CFDBCOMP project is created by the process and contains records and pages containing configured ChartFields.

Properties

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

Task 5-5-9: Updating Asset Management ChartField SQC

This step runs the SQR AMCFBULD, which updates the file AMCHARTS.SQC. Once the process completes successfully, you will find a new AMCHARTS.SQC in your TEMP directory. Move AMCHARTS.SQC into your production SQR directory.

Properties

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

Task 5-5-10: Exporting ChartField Configuration Data

To avoid running the ChartField Configuration process again in the Move to Production passes, this step exports the data updated by this process from your first Copy of Production database. The script name for your path is:

`MVCGGLZ25E.DMS`

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Properties

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

Task 5-5-11: Importing ChartField Configuration Data

This script imports the ChartField Configuration data into the new Copy of Production Database. The script name for your path is:

`MVCGGLZ25I.DMS`

Properties

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

Task 5-6: Modifying Trigger Tables

This section discusses:

- Understanding Modifying Trigger Tables
- Building the UPG_SPL_DELSYNCH Script
- Running the UPG_SPL_DELSYNCH Script
- Building the UPG_SPL_DELSYNCH2 Script
- Running the UPG_SPL_DELSYNCH2 Script
- Building the UPG_SPL_SYNCH Tables Script
- Running the UPG _SPL_SYNCH Tables Script
- Building the UPG_SPL_SYNCH Triggers Script
- Running the UPG_SPL_SYNCH Triggers Script
- Building the UPG_SPL_SYNCH2 Script
- Running the UPG_SPL_SYNCH2 Script

Understanding Modifying Trigger Tables

In this task, you re-create some tables on which the triggers on another set of tables depend. You must perform this particular task outside of the standard steps in the Modifying the Database Structure task, due to restrictions that the table naming conventions impose on the build order of these tables.

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Task 5-6-1: Building the UPG_SPL_DELSYNCH Script

This step generates the SQL script to re-create a set of tables on which the triggers on another set of tables depend. The script name for your upgrade path is:

```
UPG_SPL_DELSYNCH_CRTTBL.SQL
```

Properties

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

Task 5-6-2: Running the UPG_SPL_DELSYNCH Script

In this step, you run the SQL script generated in the previous step.

Properties

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

Task 5-6-3: Building the UPG_SPL_DELSYNCH2 Script

This step generates the SQL script to alter a set of tables on which the triggers on another set of tables depend. The script name for your upgrade path is:

```
UPG_SPL_DELSYNCH2_ALTTBL.SQL
```

Properties

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

Task 5-6-4: Running the UPG_SPL_DELSYNCH2 Script

In this step, you run the SQL script generated in the previous step.

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Properties

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

Task 5-6-5: Building the UPG_SPL_SYNCH Tables Script

This step generates the UPG_SPL_SYNCH_CRTTBL.SQL script that contains SQL to re-create existing tables.

Properties

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

Task 5-6-6: Running the UPG _SPL_SYNCH Tables Script

In this step, you run the SQL script generated in the previous step.

Properties

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

Task 5-6-7: Building the UPG_SPL_SYNCH Triggers Script

This step generates the UPG_SPL_SYNCH_CRTTRGR.SQL script that contains SQL to re-create triggers on the tables that were created in the previous step.

Properties

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

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Task 5-6-8: Running the UPG_SPL_SYNCH Triggers Script

In this step, you run the SQL script generated in the previous step.

Properties

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

Task 5-6-9: Building the UPG_SPL_SYNCH2 Script

This step generates the UPG_SPL_SYNCH2_ALTTBL.SQL script that contains SQL to alter existing tables.

Properties

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

Task 5-6-10: Running the UPG_SPL_SYNCH2 Script

In this step, you run the SQL script generated in the previous step.

Properties

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

Task 5-7: Preparing for Data Conversion Analysis

This section discusses:

- Updating Statistics Again for Oracle
- Populating the Initial Alter Analyzer Repository
- Populating the MTP Alter Analyzer Repository

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Task 5-7-1: Updating Statistics Again for Oracle

Earlier in the upgrade process, you updated your statistics for Oracle. In order to improve the performance of the next step, Populating the Initial Alter Analyzer Repository, we strongly advise you to update statistics again. Contact your database administrator to have the statistics updated on your database before proceeding to the next step.

Properties

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

Task 5-7-2: 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 5-7-3: 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 5-8: Modifying the Database Structure

This section discusses:

- Understanding Modifying the Database Structure

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- Backing Up for DB2
- Re-Creating the DB2 Tablespace Audit Project
- Auditing DB2 Tablespace Assignments Again
- Generating DB2 Tablespace Migration Scripts
- Editing DB2 Tablespace Migration Scripts
- Altering DB2 Tablespace Migration Tables
- Creating DB2 Tablespace Migration Indexes
- Creating DB2 Tablespace Migration Triggers
- Updating Tablespace Names Again
- 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
- Recycling Tablespace Version Numbers
- 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 Tablespace and Index States
- Reviewing the Create Indexes Log
- Dropping Indexes for Data Conversion
- Creating Indexes for Data Conversion
- Creating Upgrade Views
- Setting Index Parameters
- Setting Temporary Table Tablespace Names
- Setting Tablespace Names
- Generating the DB2 LUW RUNSTATS Script
- Updating Statistics for DB2 LUW
- Updating Statistics for DB2 zOS

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- 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. For DB2 customers, tables that will contain LOB fields in the new application release must be migrated to appropriately sized tablespaces.

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 product documentation for PeopleTools: Change Assistant and Update Manager for your new release for information about error handling.

Task 5-8-1: 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 5-8-2: Re-Creating the DB2 Tablespace Audit Project

This step creates the empty project PTUPGLOBDB2TS. This project will be populated in the next step, Auditing DB2 Tablespace Assignments Again, which runs the LOBDB2TS.SQR.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 5-8-3: Auditing DB2 Tablespace Assignments Again

This step runs LOBDB2TS.SQR, which audits the tablespace information stored in the PeopleSoft system for records with Long, Image, or Attachment fields to make sure the tablespace has a sufficiently large page size. LOBDB2TS.SQR reports on any records in a tablespace with an insufficiently sized page size as well as any such records assigned to a nonexistent tablespace. Any problematic records are automatically reassigned to the PSIMAGE2 tablespace in the PeopleSoft PeopleTools metadata after running the SQR. These records are also inserted into the PTUPGLOBDB2TS project. If there are no records fitting this criteria, then both the SQR report and the project will be empty.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 5-8-4: Generating DB2 Tablespace Migration Scripts

This step builds the PTUPGLOBDB2TS project and generates the SQL scripts PTUPGLOBDB2TS_ALTER.SQL, PTUPGLOBDB2TS_INDEX.SQL, and PTUPGLOBDB2TS_TRIGGER.SQL. The generated scripts will alter tables and re-create indexes and triggers for tables in the PTUPGLOBDB2TS project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 5-8-5: Editing DB2 Tablespace Migration Scripts

Review the output from the LOBDB2TS.SQR script in order to review the reassignment of any PeopleTools records with Long, Image, or Attachment field types to a tablespace with a sufficiently large page size. Any problematic records reported by the SQR were inserted into the PTUPGLOBDB2TS project for your convenience and automatically reassigned to the PSIMAGE2 tablespace. If there are no records fitting this criteria, then both the SQR report and the project will be empty.

In this step, you edit the DB2 tablespace migration scripts for tablespace names and sizing. If you are not using the PeopleSoft tablespace names, you need to review and modify the script created previously in the step Generating the DB2 Tablespace Migration Scripts. Have your database administrator review these scripts and modify the tablespace names appropriately. You can find the script in your PeopleSoft Change Assistant output directory for this upgrade pass.

The script names for your upgrade path are:

```
PTUPGLOBDB2TS_ALTER.SQL
```


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```
PTUPGLOBDB2TS_INDEX.SQL
PTUPGLOBDB2TS_TRIGGER.SQL
```

Ensure that all corresponding LOB tablespaces exist, or reassign to another tablespace as needed. When the migration scripts are generated, PeopleTools assumes that the matching LOB tablespaces exist for the base tablespace.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 5-8-6: Altering DB2 Tablespace Migration Tables

This step runs the PTUPGLOBDB2TS_ALTER.SQL script. This will alter the existing tables to a tablespace with a sufficiently large page size as well as any new release changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 5-8-7: Creating DB2 Tablespace Migration Indexes

This step runs the PTUPGLOBDB2TS_INDEX.SQL script. This will re-create the indexes for the tables being altered in the DB2 tablespace migration.

Note. 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. Ignore any errors for now, as you will review the same index errors in the later step Reviewing the Create Indexes Log.

See Reviewing the Create Indexes Log.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 5-8-8: Creating DB2 Tablespace Migration Triggers

This step runs the PTUPGLOBDB2TS_TRIGGER.SQL script. This script will re-create the triggers for the tables being altered in the DB2 tablespace migration.

Note. The script may fail for triggers on tables that are not yet created. You can ignore any errors for triggers that fail on tables that are new in the release and do not yet exist.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 5-8-9: Updating Tablespace Names Again

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 PTUPGLOBDB2TS_ALTER.SQL 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	DB2 LUW	All

Task 5-8-10: 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`

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Properties

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

Task 5-8-11: 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 5-8-12: 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 PTIAPOPPROJ 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 5-8-13: 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:

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UPGCRTTMPTBL_CRTTBL.SQL

Note. This step is required.

Properties

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

Task 5-8-14: 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 5-8-15: 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

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Task 5-8-16: 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 5-8-17: 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 5-8-18: 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`

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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 5-8-19: Recycling Tablespace Version Numbers

The PeopleSoft PeopleTools alter processing for DB2 z/OS was designed to prevent DB2 from creating an excessive number of tablespace versions by carefully controlling which table alters are committed per tablespace. However, it is possible that DB2 may still create the maximum number of tablespace versions when running the alter script if there are shared tablespaces already close to the maximum 255 version numbers.

To minimize the possibility that the alter script will stop with SQL code -4702 (exceeding the maximum number of tablespace versions), find any tablespaces that may be close to the maximum allowed version number and run the Reorg Tablespace and Modify Recovery utilities.

See the product documentation for PeopleTools: Data Management for your new release for more information about administering PeopleSoft databases on DB2 for z/OS.

Properties

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

Task 5-8-20: 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:

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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 LUW Oracle Informix	All

Task 5-8-21: 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

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Task 5-8-22: 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 5-8-23: 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 5-8-24: 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`

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Properties

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

Task 5-8-25: 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`

Note. PeopleSoft Change Assistant disables auto-commit when it runs SQL scripts. This is designed to prevent DB2 from creating an excessive number of tablespace versions.

Properties

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

Task 5-8-26: 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 5-8-27: 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.

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Properties

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

Task 5-8-28: Reviewing Tablespace and Index States

After altering tables, DB2 may have placed tablespaces or indexes in either an Advisory Reorg Pending (AREO*) or Rebuild Pending (RBDP) status depending on the nature of the change made to a particular table. Run the DB2 display database command to find any tablespaces or indexes with either status. Resolve any AREO* or RBDP states by running the DB2 Reorg Tablespace utility before continuing with the upgrade.

See the product documentation for PeopleTools: Data Management for your new release for more information about administering PeopleSoft databases on DB2 for z/OS.

Properties

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

Task 5-8-29: 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.

Note. You might receive an error trying to create the index PS0GM_PCL_HDR_LNG on the table PS_GM_PCL_HDR_LNG because another index, PS1GM_PCL_HDR_LNG, already exists on this table with the same definition. You may ignore this error, as you will be dropping PS1GM_PCL_HDR_LNG in the following step, "Dropping Indexes for Data Conversion." The index PS0GM_PCL_HDR_LNG will be recreated correctly later in the step "Creating Indexes Again."

The log file name for your upgrade path is:

```
ALLTABS_CRTIDX.LOG
```

See Running Data Conversion.

See Finalizing the Database Structure.

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Properties

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

Task 5-8-30: Dropping Indexes for Data Conversion

Drop the following indexes using the SQL tool of your choice. These tables are changing key structure and data conversion cannot update the new columns if these old indexes exist. Some of these indexes may not exist because they did not create in the earlier "Creating Indexes" step. This is acceptable. The following table lists the names of the indexes that you need to drop.

Table Name	Index Name
PS_GM_PCL_HDR_LNG	PS1GM_PCL_HDR_LNG
PS_PL_CYCLE_DTL_RQ	PS_PL_CYCLE_DTL_RQ

Properties

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

Task 5-8-31: Creating Indexes for Data Conversion

In this step, you create indexes to improve performance during data conversion. These indexes are only used for the purposes of data conversion. They are not required for regular operation of the products, therefore they were not created in previous steps nor are they delivered with the record definitions on the Demo database. In this step, you are asked to manually create those indexes that apply to you (not using PeopleSoft Application Designer).

It is important to use the following naming convention so that the Alter with Deletes script that you run in the task Finalizing the Database Structure will drop these indexes automatically. Use the format PS*[X]Record Name* where *X* is any letter A–Z. For example, if you have to create an index for the table PS_COUNTRY_TBL a proper index name would be PSUCOUNTRY_TBL. If an additional index is required for that same table, you could then name it, for example, PSYCOUNTRY_TBL. However, it is important to ensure that the new name of the index that you are creating is not already defined in the database.

Not all listed indexes are required for all customers. Reading the comments with each listed index will help you determine whether the index is applicable to your specific upgrade. Work with your database administrator to create a script that will build the indexes in your Copy of Production. You can then modify the PeopleSoft Change Assistant template to automate this step (for the initial pass and all future passes too). To do that, go to the Upgrade Template view, then right-click on the step and edit the step properties. Add your script name, without the file extension, in the Script/Procedure field and change the Type to *SQL Script.*

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After reading the comments to determine whether the index is applicable to your situation, create or modify the following indexes in your Copy of Production database:

Table	With Columns	Comments
PS_CUST_CONVER_DTL	CONVR_QUALIFIER_CD BUSINESS_UNIT CUST_ID CONVR_QUAL_FIELD ITEM_LINE	This index should be nonunique. ARM05 will use this table to update all ITEM records where a CUST_CONVER_DTL exists. (CONVR_QUAL_FIELD is ITEM when CONV_QUALIFIER_CD = 'I').

Properties

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

Task 5-8-32: Creating Upgrade Views

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

Properties

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

Task 5-8-33: Setting Index Parameters

This step updates index overrides stored in the PSIDXDDLPARM 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	DB2 z/OS	All

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Task 5-8-34: 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 5-8-35: 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 LUW DB2 z/OS	All

Task 5-8-36: Generating the DB2 LUW RUNSTATS Script

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update the statistics on DB2 LUW.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 5-8-37: Updating Statistics for DB2 LUW

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 LUW	All

Task 5-8-38: 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 5-8-39: 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

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Task 5-8-40: 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 5-9: 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 Application Data
- Importing Application Data
- Exporting Data Conversion Driver Data
- Importing Data Conversion Driver Data

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Task 5-9-1: 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:

`DLEPLASWAP.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 5-9-2: 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 5-9-3: 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.

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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 5-9-4: 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 5-9-5: 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.

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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 5-9-6: 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 5-9-7: 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:

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MVAPPIMP.DMS

Properties

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

Task 5-9-8: 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 5-9-9: 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 5-9-10: 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:

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MVUPX16E.DMS

Properties

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

Task 5-9-11: 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 5-9-12: 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 5-9-13: Importing the Feed Data

This script imports 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:

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PTUPGPTFPIMP.DMS

Properties

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

Task 5-9-14: 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:

MVEP90EXP.DMS

See "Preparing Your Database for Upgrade."

Properties

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

Task 5-9-15: 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:

MVEP90IMP.DMS

See "Preparing Your Database for Upgrade."

Properties

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

Task 5-9-16: Exporting Application Data

This script exports data from the Source database for various application system data tables. The script name for your upgrade path is:

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DLEPUPV33E.DMS

Properties

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

Task 5-9-17: Importing Application Data

This script imports data into your Copy of Production database. These tables are various application system data tables that contain data required for some data conversion programs. The remaining application system data will be loaded after tables are altered to delete obsolete columns. The script name for your upgrade path is:

DLEPUPV33I.DMS

Properties

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

Task 5-9-18: 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:

PTIADCEX.DMS

Properties

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

Task 5-9-19: 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:

PTIADCIM.DMS

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Properties

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

Task 5-10: Applying Updates Before Data Conversion

You should have downloaded and applied Required at 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 My Oracle Support, Your application home page, Updates and Fixes Required at Upgrade, "Applying Fixes Required at Upgrade."

Important! Apply all Required at Upgrade fixes even if you have not licensed the products in your application. 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. After applying the update into your Demo database review any included documentation.

   See the PeopleTools: Change Assistant PeopleBook for your current release.

2. 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.
3. 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.
4. 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

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Task 5-11: Running the Data Conversion Analyzer

In this task, you run the PTIAANALYSIS 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 the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about understanding the PTIA data conversion process.

See Running Data Conversion.

Properties

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

Task 5-12: 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 5-13: Running Data Conversion

This section discusses:

- Understanding Data Conversion
- Reviewing Data Conversion Tips
- Turning Trace On
- Performing Data Conversion Concurrently
- Turning Trace Off

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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 5-13-1: 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
- Restarting Data Conversion

Reviewing the Upgrade Driver Programs

PTIADATACONV is an Application Engine program designed to run upgrade data conversions that are defined in the PS_PTIA_DCAEPGMS table. PTIADATACONV leverages dependency analysis to optimize the runtime of the data conversion. Multiple instances of the PTIADATACONV Application Engine program are designed to be run in parallel to execute against a single set of dependency information. You can review the sections that are called by the Upgrade Driver program by accessing the Define Data Conversion page on the Demo database.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing the data conversion report.

Using the Data Conversion Documentation

Each section called by the Upgrade Driver program contains comments describing the underlying conversion. By running the PTIA0010.SQR report you can find which sections are called by the Upgrade Driver program and what they are doing.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing the data conversion report.

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 Data Conversion page.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing custom data conversion code.

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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.

If you receive the following warning and your data conversion has completed successfully, the Application Engine step has used the base temp table:

```
WARNING: NO DEDICATED INSTANCES AVAILABLE FOR <recname> - USING BASE TABLE
```


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To avoid this warning in subsequent upgrade passes, increase the number of temp table instances in the affected Application Engine program properties dialog box to be equal to or greater than the number of data conversion threads that you are running.

See Appendix: "Using the Comparison Process."

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing custom data conversion code.

Restarting Data Conversion

Processes run through 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 through 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 through 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.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing custom data conversion code.

Properties

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

Task 5-13-2: 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 by PTIA0005.SQR.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing the execution report by step.

See the product documentation for PeopleTools: Application Engine for your new release for more information about tracing Application Engine programs.

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Properties

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

Task 5-13-3: Performing Data Conversion Concurrently

This step runs the PTIADATACONV Application Engine program for all data conversion groups. 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 the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about reviewing PTIA reporting.

Properties

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

Task 5-13-4: 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 the product documentation for PeopleTools: Application Engine for your new release for more information about tracing Application Engine programs.

Properties

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

Task 5-14: 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.

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Properties

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

Task 5-15: 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 5-15-1: 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_CRTTRG.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.

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Properties

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

Task 5-15-2: 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 5-15-3: 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 5-15-4: Creating Triggers

This step executes the script ALLTABS_DEL_CRTTRG.SQL, which was generated in a previous step.

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Properties

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

Task 5-15-5: 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 5-15-6: 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 5-16: Loading Data to Complete System Setup

This section discusses:

- Exporting Strings
- Importing Strings
- Importing EDI Statements

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- 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 Notification Template Table
- Importing Notification Template Table
- Exporting Approval Framework System Data
- Importing Approval Framework System Data
- Exporting Common Portal System Options
- Importing Common Portal System Options
- Exporting Setup Data
- Importing Setup Data
- Exporting Activity Guide Data
- Importing Activity Guide Data
- Exporting Authorization Service Data
- Importing Authorization Service Data
- Exporting File Extension Lists
- Importing File Extension Lists
- Exporting Interwindow Communication Data
- Importing Interwindow Communication Data
- Exporting Pivot Grid Data
- Importing Pivot Grid Data
- Exporting Related Content Data
- Importing Related Content Data
- Exporting WorkCenter Data
- Importing WorkCenter 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.

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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: 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 5-16-4: 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.

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Properties

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

Task 5-16-5: 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 5-16-6: 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 5-16-7: 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.

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Properties

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

Task 5-16-8: 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:

`DLEPLASYSE.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 Apply Type property in the PeopleSoft Change Assistant template to *Initial Pass* for this step.

Properties

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

Task 5-16-9: 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:

`DLEPLASYSI.DMS`

Properties

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

Task 5-16-10: 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:

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DLEPSYSE.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 Apply Type property from *Both* to *Initial Pass* in the step properties and save the job.

Properties

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

Task 5-16-11: 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:

DLEPSYSI.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 5-16-12: Exporting Notification Template Table

This script exports the notification template information 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:

DLCGUPY39E.DMS

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve this DAT file and set the properties in the template to *Initial Upgrade.*

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Properties

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

Task 5-16-13: Importing Notification Template Table

This script imports the system data, exported in the above step, into the Copy of Production database. The script name for your upgrade path is:

`DLCGUPY39I.DMS`

Note. Run this script using bootstrap mode.

Properties

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

Task 5-16-14: Exporting Approval Framework System Data

This script exports the approval framework system data 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:

`DLCGUPY41E.DMS`

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve this DAT file and set the properties in the template to *Initial Upgrade.*

Properties

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

Task 5-16-15: Importing Approval Framework System Data

This script imports the system data, exported earlier in this task, into the Copy of Production database. The script name for your upgrade path is:

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DLCGUPY41I.DMS

Note. Run this script using bootstrap mode.

Properties

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

Task 5-16-16: 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 5-16-17: 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 5-16-18: 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.

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Properties

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

Task 5-16-19: 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 5-16-20: Exporting Activity Guide Data

This script exports Activity Guide lists and items from the Demo database during the initial upgrade pass. The script name for your upgrade path is:

`PTUPGPTAIEXP.DMS`

Properties

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

Task 5-16-21: Importing Activity Guide Data

This script imports Activity Guide lists and items into your Copy of Production database during the initial upgrade pass. The script name for your upgrade path is:

`PTUPGPTAIIMP.DMS`

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Properties

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

Task 5-16-22: Exporting Authorization Service Data

This script exports Authorization as a Service configuration data from the Demo database. The script name for your upgrade path is:

`PTCAC_AUTHSERVICE_CONFIG_EXP.DMS`

Properties

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

Task 5-16-23: Importing Authorization Service Data

This script imports Authorization as a Service configuration data into your Copy of Production database. The script name for your upgrade path is:

`PTCAC_AUTHSERVICE_CONFIG_IMP.DMS`

Properties

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

Task 5-16-24: Exporting File Extension Lists

This script exports the definition and contents of every file extension list defined for attachments in the new release. The script name for your upgrade path is:

`PTFX_EXTLSTS_EXP.DMS`

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Properties

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

Task 5-16-25: Importing File Extension Lists

This script imports the definition and contents of every file extension list delivered in the new release. Note that for any duplicates, this script will overwrite any customizations that were made. The script name for your upgrade path is:

`PTFX_EXTLSTS_IMP.DMS`

Properties

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

Task 5-16-26: Exporting Interwindow Communication Data

This script exports Interwindow Communication (IWC) configuration data from the Demo database, which includes IWC and message event definitions.

The script name for your upgrade path is:

`PTUPGPTIWCEXP.DMS`

Properties

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

Task 5-16-27: Importing Interwindow Communication Data

This script imports Interwindow Communication (IWC) configuration data into your Copy of Production database.

The script name for your upgrade path is:

`PTUPGPTIWCIMP.DMS`

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Properties

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

Task 5-16-28: Exporting Pivot Grid Data

This script exports Pivot Grid definitions, data source types, and other Pivot Grid data from the Demo database during the initial upgrade pass. The script name for your upgrade path is:

`PTUPGPGEXP.DMS`

Properties

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

Task 5-16-29: Importing Pivot Grid Data

This script imports Pivot Grid definitions, data source types, and other Pivot Grid data into your Copy of Production database during the initial upgrade pass. The script name for your upgrade path is:

`PTUPGPGIMP.DMS`

Properties

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

Task 5-16-30: Exporting Related Content Data

This script exports Related Content services and service definitions from the Demo database during the initial upgrade pass. The script name for your upgrade path is:

`PTUPGPTRCEXP.DMS`

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Properties

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

Task 5-16-31: Importing Related Content Data

This script imports Related Content services and service definitions from the Demo database during the initial upgrade pass. The script name for your upgrade path is:

`PTUPGPTRCIMP.DMS`

Properties

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

Task 5-16-32: Exporting WorkCenter Data

This script exports WorkCenter configuration data from the Demo database. The script for your upgrade path is:

`PTUPGALEXP.DMS`

Properties

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

Task 5-16-33: Importing WorkCenter Data

This script imports WorkCenter configuration data into your Copy of Production database. The script name for your upgrade path is:

`PTUPGALIMP.DMS`

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Properties

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

Task 5-16-34: 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 5-16-35: 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 Stored Statements

This section discusses:

- Understanding Loading Stored Statements
- Running the STOREGL Script
- Running the STOREIN Script
- Running the STOREMG Script

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- Running the STOREPO Script

Understanding Loading Stored Statements

This task loads all the new COBOL stored statements in your database. The STORE*.DMS scripts are located in the *PS_APP_HOME*\SRC\CBL\BASE directory. These scripts are only delivered if you have licensed the product and should only appear in the PeopleSoft Change Assistant job based on the product configuration in the environment definition.

The stored statements scripts are executed only in the initial pass. In the Move to Production passes, a different script will export the stored statement table, PS_SQLSTMT_TBL, from the first Copy of Production and import it into the second Copy of Production.

Task 5-17-1: Running the STOREGL Script

STOREGL.DMS loads stored statements for COBOL programs owned by the PeopleSoft General Ledger product.

Properties

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

Task 5-17-2: Running the STOREIN Script

STOREIN.DMS loads stored statements for COBOL programs owned by the PeopleSoft Inventory product.

Properties

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

Task 5-17-3: Running the STOREMG Script

STOREMG.DMS loads stored statements for COBOL programs owned by Oracle's PeopleSoft Manufacturing product.

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Properties

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

Task 5-17-4: Running the STOREPO Script

STOREPO.DMS loads stored statements for COBOL programs run by Oracle's PeopleSoft Purchasing product.

Properties

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

Task 5-18: Running Final Update Statistics

This section discusses:

- Generating Final RUNSTATS for DB2 LUW
- Running Final Statistics for DB2 LUW
- Running Final Statistics for DB2 zOS
- Running Final Statistics for Informix
- Running Final Statistics for Oracle

Task 5-18-1: Generating Final RUNSTATS for DB2 LUW

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update statistics on DB2 LUW.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

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Task 5-18-2: Running Final Statistics for DB2 LUW

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. Run the RUNSTATS.SQL script created in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 LUW	All

Task 5-18-3: Running Final Statistics for DB2 zOS

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. 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 5-18-4: Running Final Statistics for Informix

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. This step runs UPDATESTATS to update the statistics on your database.

Properties

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

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Task 5-18-5: Running Final Statistics for Oracle

Earlier in the upgrade process you upgraded your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade and testing.

Properties

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

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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
- Running the Final SWPAUDIT Report
- Creating the FNLALTAUD Project
- Running the Final Alter Audit
- Reviewing the Final Audits
- Running the Final SETINDEX Report

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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 PeopleSoft 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: Running the Final SWPAUDIT Report

SWPAUDIT is an SQR that checks database integrity in a multilingual context. For example, SWPAUDIT can identify a base and related-language record with mismatched key fields.

Properties

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

Task 5-22-4: 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 and temp tables. This project also includes any custom records that you have created in your system.

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Properties

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

Task 5-22-5: 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 5-22-6: 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 LUW 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, SWPAUDIT, and DDDAUDIT reports and correct any discrepancies.

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Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from the 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 Oracle-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 Oracle deletes a Permission List, and you have a Role that still refers to that Permission List, then it will appear on the SYSAUDIT report.

See the product documentation for PeopleTools: Data Management for your new release.

Properties

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

Task 5-22-7: Running the Final SETINDEX Report

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

Properties

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

Task 5-23: Restoring the New Release Demo

Restore your New Release Demo database from the backup made earlier in the chapter "Planning Your Application Upgrade." The backup was taken before projects were copied and scripts were run against the New Release Demo. This is done to restore the environment to an Oracle-delivered Demo implementation. If your Copy of Production has a base language other than English, this restore will undo any changes you might have made on your New Release Demo (Source) in the task Running the New Release Upgrade Copy, step Swapping PeopleTools Tables and the task Loading Data for Data Conversion, step Swapping Languages on System Data, in the chapter "Applying Application Changes."

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Properties

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

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Chapter 6

Completing Database Changes

This chapter discusses:

- Understanding Database Changes
- Configuring the Upgrade Environment
- Reapplying Customizations
- Setting Up Security
- Completing Portal Data Conversion
- Backing Up Before Manual Changes
- Completing ChartField Configuration
- Reviewing PeopleTools Functionality
- Enabling Oracle Transparent Data Encryption
- Enabling Oracle Fine Grained Auditing
- Preparing the Content Provider Registry
- Updating the Portal Options Data
- Setting Country Codes
- Creating Credit Card Groups
- Converting to a Hosted Credit Card Model
- Upgrading the Credit Card Integration
- Configuring PeopleSoft Integration with Vertex O
- Setting Up SES Global and Component Search
- Reconciling Notification Templates
- Reviewing Approval Workflow Framework
- Completing Billing Setup
- Setting Up Prefixes for Purchasing Document IDs
- Setting Up Prefixes for Contract Document IDs
- Completing Services Procurement Setup
- Reviewing Strategic Sourcing Profile Questions
- Completing Supplier Contracts Setup
- Configuring PayBill Management
- Preparing Treasury Setup
- Completing Setup for Government Contracts
- Completing Setup for Projects

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- Setting Resource Management
- Completing Staffing Front Office Setup
- Performing Payables Setup
- Completing Receivables Changes
- Updating eSettlements
- Updating the General Ledger
- Completing Asset Management Setup
- Completing Expenses Setup
- Setting VAT Processing
- Configuring Inventory
- Configuring Asset Management
- Setting Up WorkCenters
- Deleting Rename 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 Oracle's PeopleSoft Enterprise 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 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.

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Properties

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

Task 6-1-2: Configuring Portal

Running PeopleSoft Enterprise 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 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 Node 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

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- 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.

Once you reapply all of your customizations, you should run the DDDAUDIT and SYSAUDIT reports to make sure that you did not introduce any problems into your system.

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 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 that 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 PeopleSoft 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 product documentation in the PeopleTools: PeopleSoft Application Designer Developer's Guide for your new release for information about using the Registration Wizard.

See the product documentation for PeopleTools: Portal Technology for your new release for information about administering portals.

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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 home pages.

Task 6-3-1: Performing Security Setup

This section discusses:

- Understanding Security Setup

Understanding Security Setup

Navigate to 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 PeopleSoft 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 navigate to 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 Applications Portal 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.

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Properties

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

Task 6-3-2: Synchronizing CREF Permissions

This step runs the Application Engine program PORTAL_CSS, which synchronizes Portal Registry Structures and Permission Lists for all Portal Registry Definitions in the Upgrade database. The Portal Registry Structures, as copied from the new release, do not initially reference any permission lists on the Upgrade database. The synchronization process matches the existing permission lists to the appropriate Registry Structures. Review any messages received during the running of this process with your Portal Administrator.

See the product documentation for PeopleTools: Portal Technologies 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. In order 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:

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1. Using PeopleSoft Data Mover, sign on to the Target database.
2. Open the Data Mover script *PS_APP_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 on to the Target database.
2. Open the Data Mover script *PS_APP_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, since a GUEST user should not be personalizing the common homepage.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	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.

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Correcting Logged Issues

Review the log from running the data conversion UPGPT846PP Application Engine program in the chapter "Applying Application Changes," task 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 oprid -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
```


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Properties

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

Task 6-5: Backing Up Before Manual Changes

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 6-6: Completing ChartField Configuration

This section discusses:

- Running the Configuration Steps Report
- Performing Manual Configuration Steps
- Updating System Data Duplicates for ChartFields

Task 6-6-1: Running the Configuration Steps Report

Follow the procedure below to run the Configuration Steps report.

To run the Configuration Steps report:

1. Select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Reports, Configuration Steps.
2. Run the Configuration Steps report for CF Configuration ID: INSTALL_PRODUCT.

Properties

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

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Task 6-6-2: Performing Manual Configuration Steps

The manual configuration steps are outlined in the Configuration Steps report that you ran in the previous step. You must complete these steps before using the system.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for information about configuring ChartFields.

Properties

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

Task 6-6-3: Updating System Data Duplicates for ChartFields

The system data that contains renamed ChartFields may have rows with the original ChartField names, which are not detected as duplicates when the system data gets loaded. This program either removes or updates the duplicates.

You must complete this step before using the system if you have renamed ChartFields in your production database.

Properties

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

Task 6-7: Reviewing PeopleTools Functionality

The PeopleSoft Enterprise 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 Enterprise PeopleBooks and PeopleSoft PeopleTools installation guide in order 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 for 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

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during the upgrade process.

- Oracle has updated the styles that define the look of the user interface.

  Five user interface options were delivered with your current release of PeopleSoft 8.x, as shown in the following table:

Style Name	Style Default
Classic (deprecated as of PeopleTools 8.50)	PeopleSoft 8.4 applications and pre-850 PeopleTools system databases
Light blue (deprecated as of PeopleTools 8.50)	NA
Dark blue	PeopleSoft 8.8, 8.9, 9.0 applications and 8.51 or later PeopleTools system databases
SWAN	PeopleSoft 9.1 applications
Tangerine	PeopleSoft 9.2 applications

  As part of the application upgrade, your PeopleSoft database was updated to the default style for your application release.

  See the product documentation for PeopleTools: PeopleSoft Application Designer Developer's Guide, for your current release for more information about creating style sheet definitions.

- 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 the product documentation for PeopleTools: PeopleSoft Integration Broker for your new release for more information about understanding migrated integration metadata.

- 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 the product documentation for PeopleTools: Portal Technology for more information about understanding changes in portal configuration settings.

- As of PeopleSoft PeopleTools 8.51, Oracle database customers can now restrict the Access ID to the minimum privileges needed to run PeopleSoft applications. If you are upgrading from PeopleSoft PeopleTools 8.50 or earlier, restrict the Access ID privileges after completing the final pass of the upgrade.

  See PeopleTools Installation for Oracle, "Creating a Database Manually on Windows" and "Creating a Database on UNIX," Creating PeopleSoft Database Roles for your current release.

- Password security has been enhanced as of PeopleSoft PeopleTools 8.53. After completing the last pass of the upgrade, you will need to reset your passwords using *PSHOME*\SCRIPTS\RESETPSWD.DMS to take advantage of this security enhancement.

- PeopleSoft PeopleTools Mobile technology and Mobile Agent are now deprecated and the functionality will no longer be available to any customers who have not already licensed it. PeopleSoft PeopleTools Mobile Agent on PDA devices is no longer supported.

  For details about the PeopleSoft PeopleTools Mobile functionality retirement announcement, go to My Oracle

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Support and search for "Tech Update: Oracle to Retire the PeopleTools Mobile Functionality" (Doc ID 832874.1). If you need to continue using PeopleSoft PeopleTools Mobile Agent functionality after the upgrade, for instructions go to My Oracle Support and search for "E-UPG Additional tasks for Mobile Agent during Upgrade to Tools 8.49 or 8.50" (Doc ID 829448.1).

- For XSL template users, BI Publisher (BIP) report definitions using XSL templates that were created using PeopleSoft PeopleTools 8.52 or earlier are incompatible with the newer BIP Core engine used in PeopleSoft PeopleTools 8.53. Regenerate your XSL template(s) using the current version of the BIP Template Builder plug-in that is available to download through PeopleSoft Pure Internet Architecture on the Design Helper page. (Select Reporting Tools, BI Publisher, Setup, Design Helper.) Reassociate the updated XSL template with the BIP report definition under the Template tab, replacing the previous version.
- As of PeopleTools 8.54, if you are an Oracle database customer, you can now use Materialized Views. Any views that are defined as Materialized Views were created earlier in the upgrade. You will need to set the appropriate refresh schedules for these Materialized Views, otherwise the information contained in the views will become stale and inaccurate. You can find the Materialized View Maintenance Page by navigating to PeopleTools, Utilities, Administration, Materialized Views, Materialized View Maintenance.

  See the product documentation for PeopleTools: Data Administration for your new release for more information about Materialized Views.
- As of PeopleTools 8.54, descending indexes are no longer supported on Oracle platforms. Review the steps in the following PeopleBook to convert your descending indexes into ascending indexes. You will run scripts to drop your descending indexes and re-create them as ascending indexes.

  See the product documentation for PeopleTools: Data Management for more information about indexes on Oracle platforms.
- As of PeopleTools 8.54, partitioning is supported on Oracle platforms. The upgrade process preserved partitioning on existing tables and indexes. Table partitioning information is stored in PTTBLPARTDDL and index partitioning information is stored in PTIDXPARTDDL. You can query these records to find the Oracle-delivered partitioning recommendations, if any. Review the delivered application partitioning recommendations, make any necessary changes for your specific environment, and then apply the changes to your environment.

  See the product documentation for PeopleTools: Data Management, Maintaining Partition Definitions for more information about partitioning on Oracle platforms.
- As of PeopleTools 8.54, global temporary tables are supported on Oracle platforms. Oracle delivered the PSGTT01 tablespace as part of the upgrade. If you want to assign tables to this tablespace within Application Designer's Change Space functionality, you can either already have a PeopleSoft table created in this tablespace and then run SETSPACE.SQR to synchronize the metadata, or you can insert the tablespace into the PSTBLSPCCAT table

  See the new release product documentation for PeopleTools: Data Management.

Properties

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

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Task 6-8: 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 the product documentation for PeopleTools: Data Management for your new release for more information about administering PeopleSoft databases on Oracle.

Properties

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

Task 6-9: Enabling Oracle Fine Grained Auditing

After completing the final pass of the upgrade, you can re-enable Oracle Fine Grained Auditing (FGA).

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To re-enable FGA:

1. Review the log file generated by running PREUPGFGAREPORT.SQL at the beginning of the upgrade.
2. Edit the script PSCREATEFGA.SQL, generated earlier in the upgrade, to remove any entries that no longer apply to the new release as some of the tables and columns referenced in the script may have been removed during the upgrade.

   You may want to enable FGA on additional tables and columns in the new release.
3. After editing the script, run the PSCREATEFGA.SQL script to re-enable Oracle Fine Grained Auditing.

See "Applying PeopleTools Changes," Performing Updates to PeopleTools System Tables, Saving Oracle Fine Grained Auditing Information.

See the product documentation for PeopleTools: Data Management for your new release for more information about administering databases on Oracle.

Properties

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

Task 6-10: Preparing the Content Provider Registry

You should perform this task if you use PeopleSoft Portal Solutions 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 Portal Solutions 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 Portal Solutions database by updating the portal registry structures in your PeopleSoft Portal Solutions 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 6-11: Updating the Portal Options Data

In this step you update the PeopleSoft PeopleTools Portal Options data.

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Note. Only perform this step if your upgraded database is on PeopleSoft PeopleTools 8.46 or later.

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 6-12: Setting Country Codes

This section discusses:

- Understanding Country Codes
- Adding New Country Codes
- Modifying Existing Country Codes

Understanding Country Codes

The PeopleSoft system provides the 239 ISO 3166-compatible country codes as part of system data. However, the PeopleSoft system also provides an interface through which you can customize the country codes, either to add new ones or modify existing ones. Since the COUNTRY_TBL record is considered system data, it was repopulated with the current countries as defined by the PeopleSoft system. As a result, any additional countries you may have added and any other customizations you may have made to this table were deleted.

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Note. The ISO 3166-1 alpha 3 country code for Romania has been changed by International Organization for Standardization (ISO). To reflect this change, the country code for Romania has been updated in your new release database from ROM to ROU. As a result of this change, your transactional data might require a correction if you are using the country code ROM.

If you have customized country code entries, perform the following steps using the results from the SQL query in the task titled Reviewing Country Data.

See "Preparing Your Database for Upgrade," Reviewing Country Data.

Task 6-12-1: Adding New Country Codes

In this step, you add new country codes.

To add new country codes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Location, Country.
2. Select the Add a New Value tab.
3. Enter the new country code and click Add.
4. Using the query results from the task titled Reviewing Country Data, enter the values in the Description, Short Description, and 2-Character Country Code fields.

   If the country is a European Union member, select the EU Member State check box.

   See "Preparing Your Database for Upgrade," Reviewing Country Data.
5. Select the Address Format tab.

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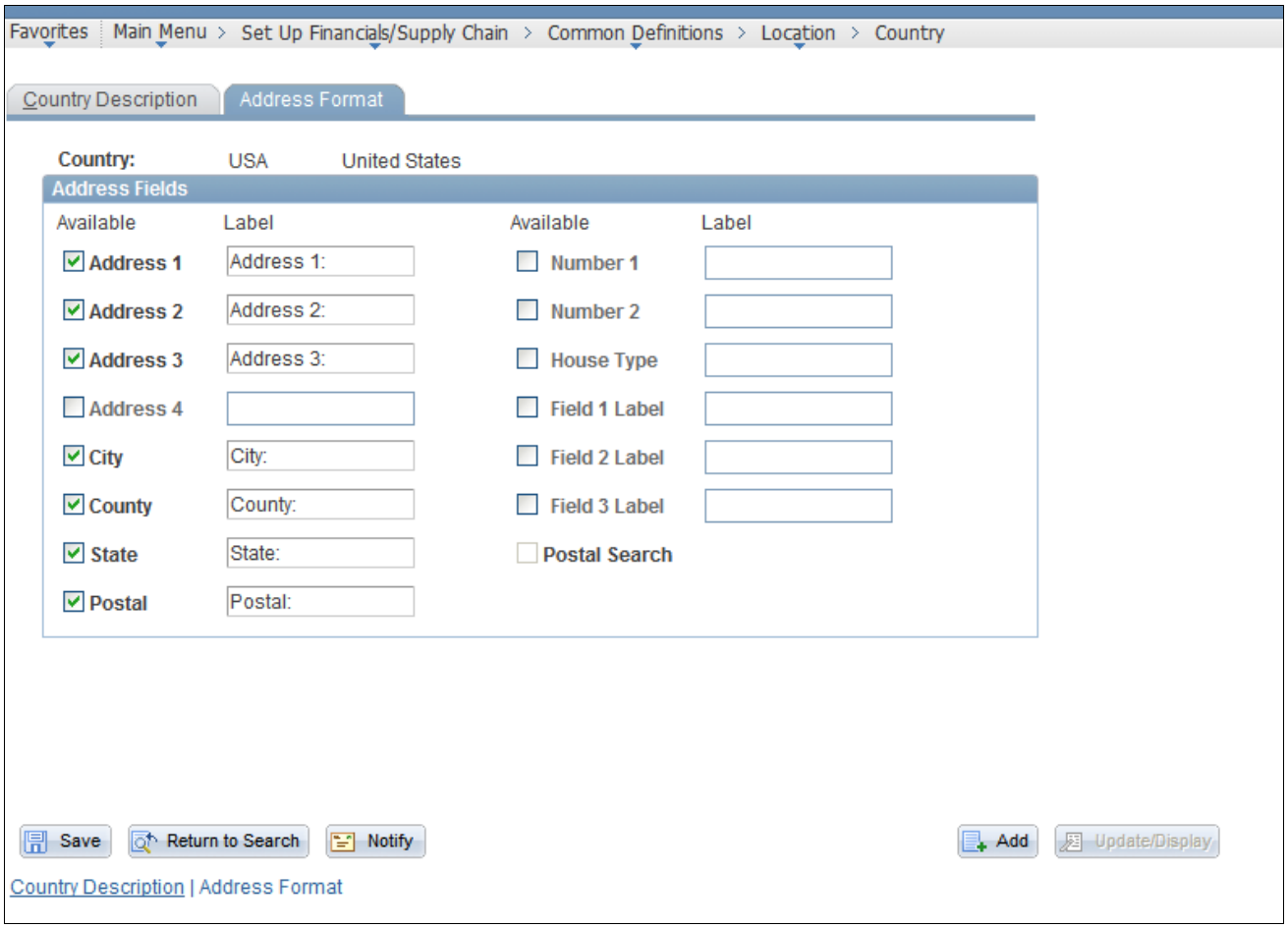
6. Indicate the labels that you would want to appear to the users affiliated with this country.

   The following example shows the labels for USA such as Address 1, Address 2, Address 3, City, County, State, and Postal.

Note. The Available check box indicates whether the label is available for display to the user.



Country page: Address Format tab

Properties

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

Task 6-12-2: Modifying Existing Country Codes

In this step, you modify your existing country codes.

To modify existing country codes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Location, Country.

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2. Enter the country code you want to modify and click Search.
3. Update the necessary fields based on the query results from the task titled Reviewing Country Data.
   See "Preparing Your Database for Upgrade," Reviewing Country Data.

Properties

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

Task 6-13: Creating Credit Card Groups

This section discusses:

- Understanding Credit Card Groups
- Setting Up the Payment Processor
- Creating a Credit Card Group
- Setting a Default Credit Card Group

Understanding Credit Card Groups

In the new release, you now have the option to group credit card types and specify a payment processor for each type.

Task 6-13-1: Setting Up the Payment Processor

You must set up your payment processor. Multiple processors can now be set up and assigned to a specific credit card type.

To set up a payment processor:

1. Select Enterprise Components, Component Configurations, Credit Card Interface, Payment Processor.

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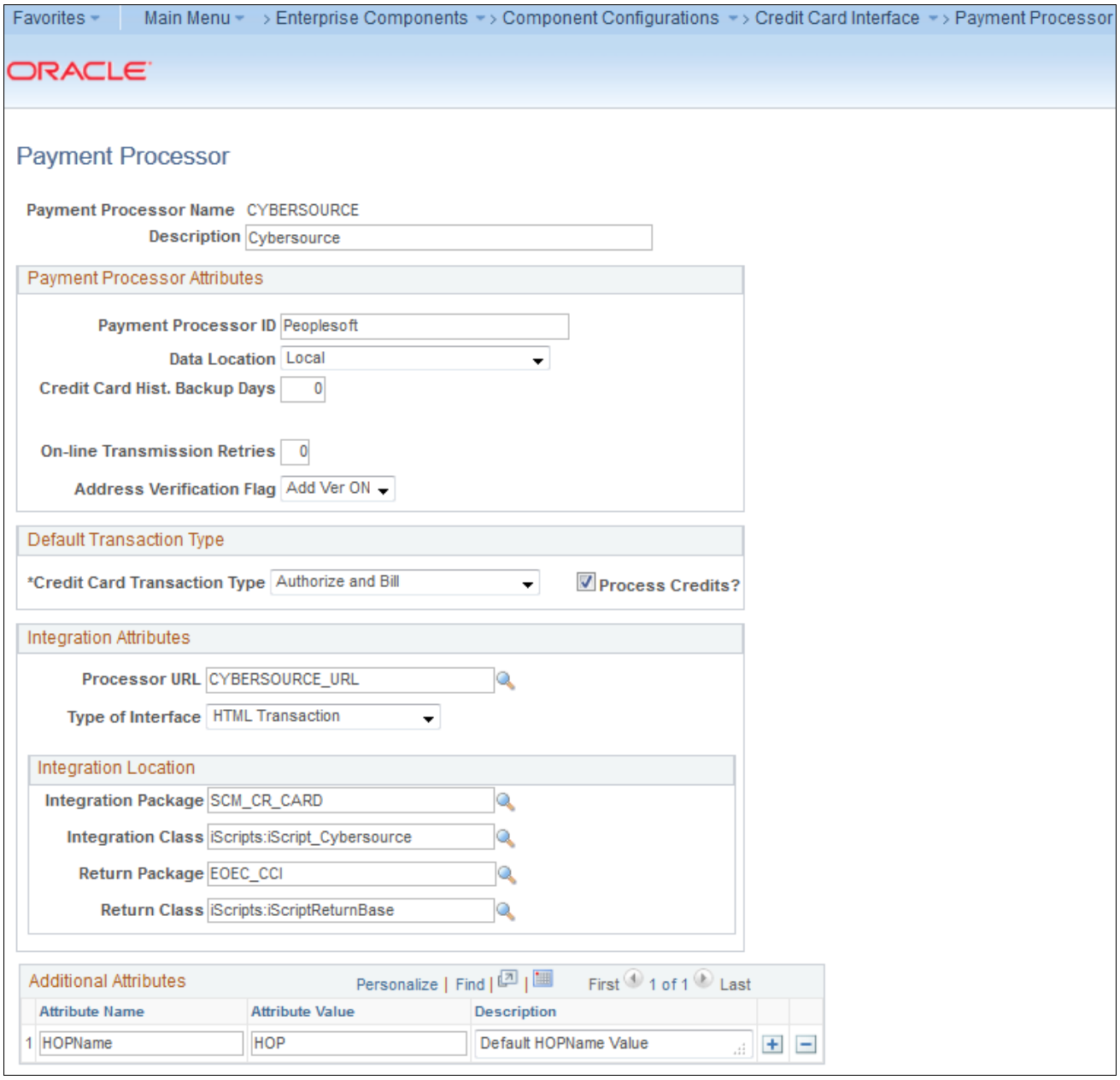
2. Enter a payment processor name.



Payment Processor page

3. Enter a description.
4. In the Payment Processor ID field, enter your merchant ID tied to your account in the third-party payment processor.
5. Select a default value in the Credit Card Transaction Type field.
6. If you will be converting your credit card payment model to a hosted model, you will need to enter values in the Integration Attributes section.

   For more details on what to enter in each field in this section, see the information about setting up the credit card interface in the product documentation for PeopleSoft: Integration Interfaces for your new release.

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Properties

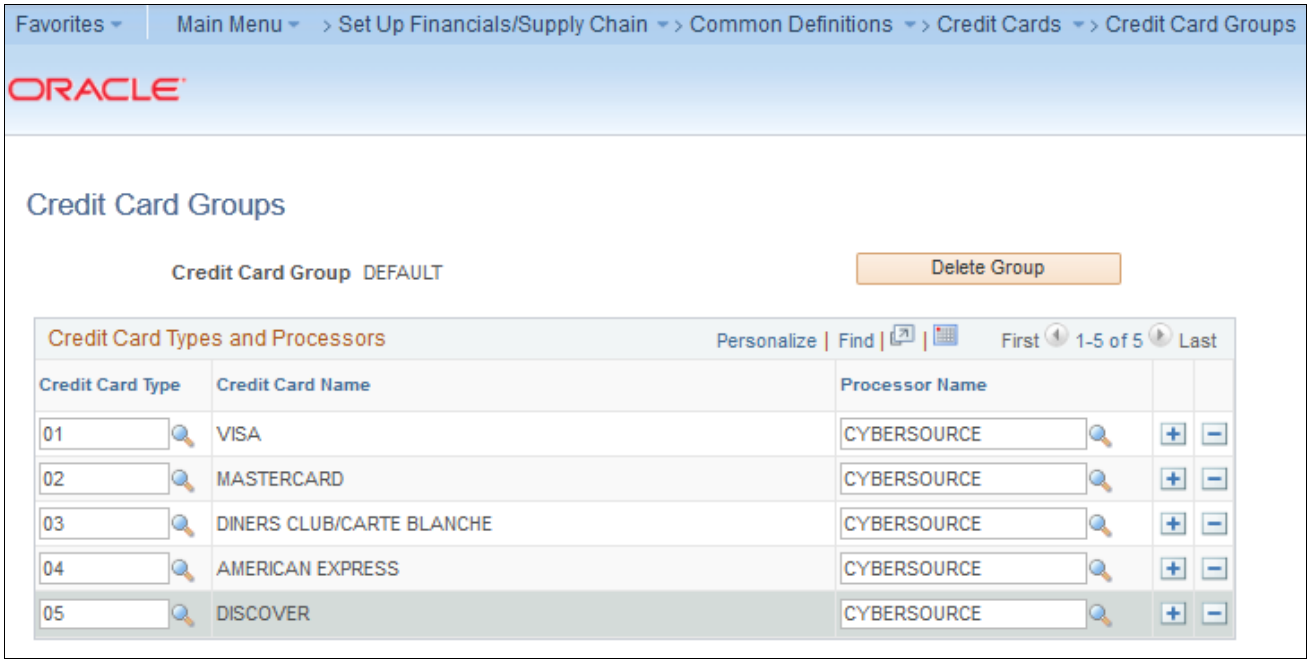
Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-13-2: Creating a Credit Card Group

In this step, you create a default credit card group and specify the payment processor that you want to use for each credit card type.

To set up a credit card group:

1. Select Set Up Financials/Supply Chain, Common Definitions, Credit Cards, Credit Card Groups.
2. Enter a name for the credit card group.



Credit Card Groups page

3. In the Credit Card Type column, select the credit card types to be added to the group.
4. For each credit card type, enter a payment processor name in the Processor Name column.

For more information about defining FSCM common definitions, see the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release.

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Properties

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

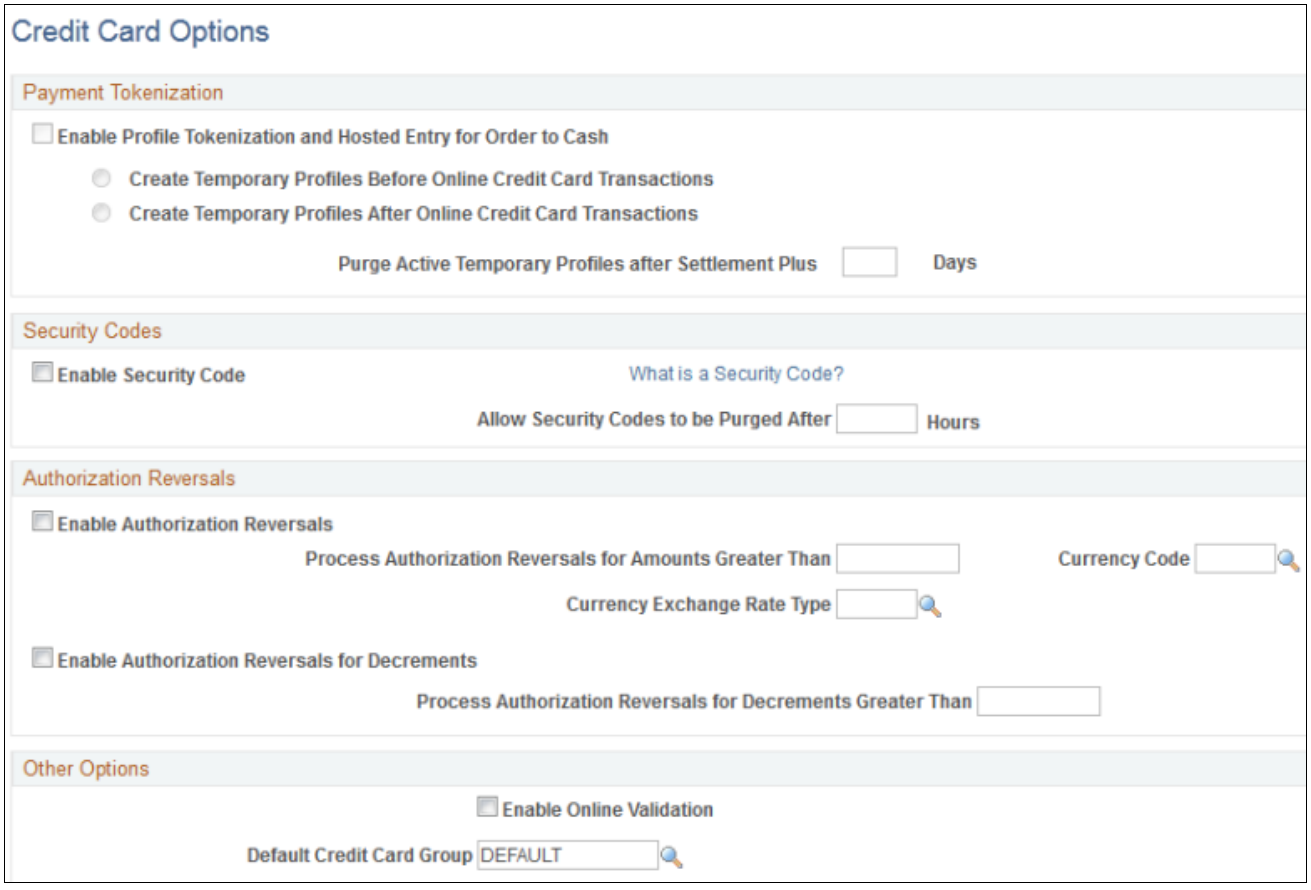
Task 6-13-3: Setting a Default Credit Card Group

In this step, you set a default credit card group.

To set a default credit card group:

1. Select Set Up Financials/Supply Chain, Common Definitions, Credit Cards, Credit Card Options.

   The Credit Card Options page appears.



Credit Card Options page

2. In the Other Options section, click the look-up icon (magnifying glass) and select a default credit card group.

For more information about defining FSCM common definitions, see the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release.

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Properties

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

Task 6-14: Converting to a Hosted Credit Card Model

This section discusses:

- Understanding the Hosted Credit Card Model
- Reviewing Credit Card Data and Transactions
- Adding Code for Credit Card Type Mapping
- Running the Credit Card Conversion Process
- Running the Credit Card Wipe Process

Understanding the Hosted Credit Card Model

In this optional task, you convert your existing credit card data into profiles. This option is only available for the Order to Cash Business Process. Converting to a hosted credit card model means that your locally stored credit card data will be transferred to a third-party credit card processor.

Warning! If you choose to convert to a hosted model, data cannot be rolled back. Please ensure that this is the credit card payment model that you really want. In addition, be aware that there may be a fee associated with converting the credit card data to a profile. The actual cost is determined by your chosen payment processor.

Task 6-14-1: Reviewing Credit Card Data and Transactions

Before you run the conversion process, you must do the following:

- Evaluate all credit card transactions to determine the cutoff date for transactions.
- Evaluate your customer base. Determine whether you have any inactive customers. If so, you can choose to exclude their data in the conversion process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management Billing Receivables	All	All

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Task 6-14-2: Adding Code for Credit Card Type Mapping

In this step, you add code for credit card type mapping. On FUNCLIB_CREDCRD.CR_CARD_TYPE.FieldFormula, add processor-specific code to the following functions:

- Function GetPSCardType: This maps Processor Credit Card Types to PS Credit Card Types

```
Function GetPSCardType(&Vendor As string, &CardType As string, &PSCard⇒
Type As string);
  rem ================================================================;
  rem Vendor Credit Card Types to PS Credit Card Types                 ;
  rem ================================================================;
  /* Declare Function GetPSCardType PeopleCode FUNCLIB_CREDCRD.CR_CARD_⇒
TYPE FieldFormula; */
  /* Dev Note:  Modify codeline to support your processors */
```

- Function GetVendorCardType: This maps PS Credit Card Types to Processor Credit Card Types

```
Function GetVendorCardType(&PSCardType As string, &Vendor As string,⇒
 &CardType As string);
  rem ================================================================;
  rem PS Credit Card Types to Vendor Credit Card Types                 ;
  rem ================================================================;
  /* Declare Function GetVendorCardType PeopleCode FUNCLIB_CREDCRD.CR_⇒
CARD_TYPE FieldFormula; */
  /* Dev Note:  Modify codeline to support your processors */
```

Sample code is provided in each function. Add your own code by referencing your own processors.

Important! Failure to add this code before running the conversion process will result in the error `Processor Credit Card Type not Setup. Cannot process. (12600,161)`.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management Billing Receivables	All	All

Task 6-14-3: Running the Credit Card Conversion Process

The new PeopleSoft FSCM release provides an option to convert from a traditional credit card model where credit card data is stored locally to a hosted model where credit card data is hosted or stored by a third party. The only data that will be locally stored is the following: last four digits of the credit card number, profile ID, credit card type, and payment processor.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for details.

To run the credit card conversion process:

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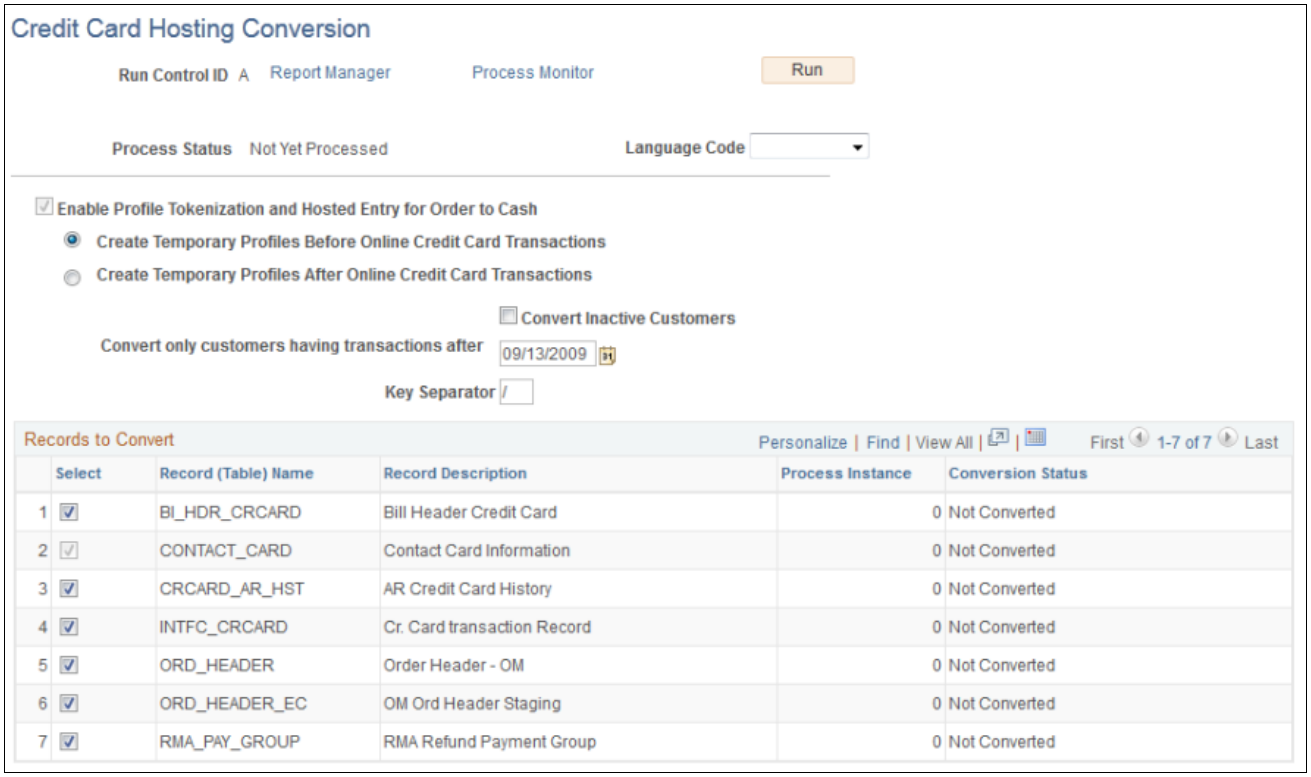
1. Select Set Up Financials/Supply Chain, Upgrade, Credit Card Hosting, Convert Credit Card Data.
2. Enter a Run Control ID.



Credit Card Hosting Conversion page

3. Select your preferred hosting option.
4. If you want to convert the data of inactive customers, select the Convert Inactive Customers check box.
5. Enter a cutoff date for transaction conversion in the "Convert only customers having transactions after" check box.
6. Enter a value for Key Separator.
7. In the Records to Convert table, select the check boxes in the rows for the records that you want to convert.
8. Click Run to start the conversion process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management Billing Receivables	All	All

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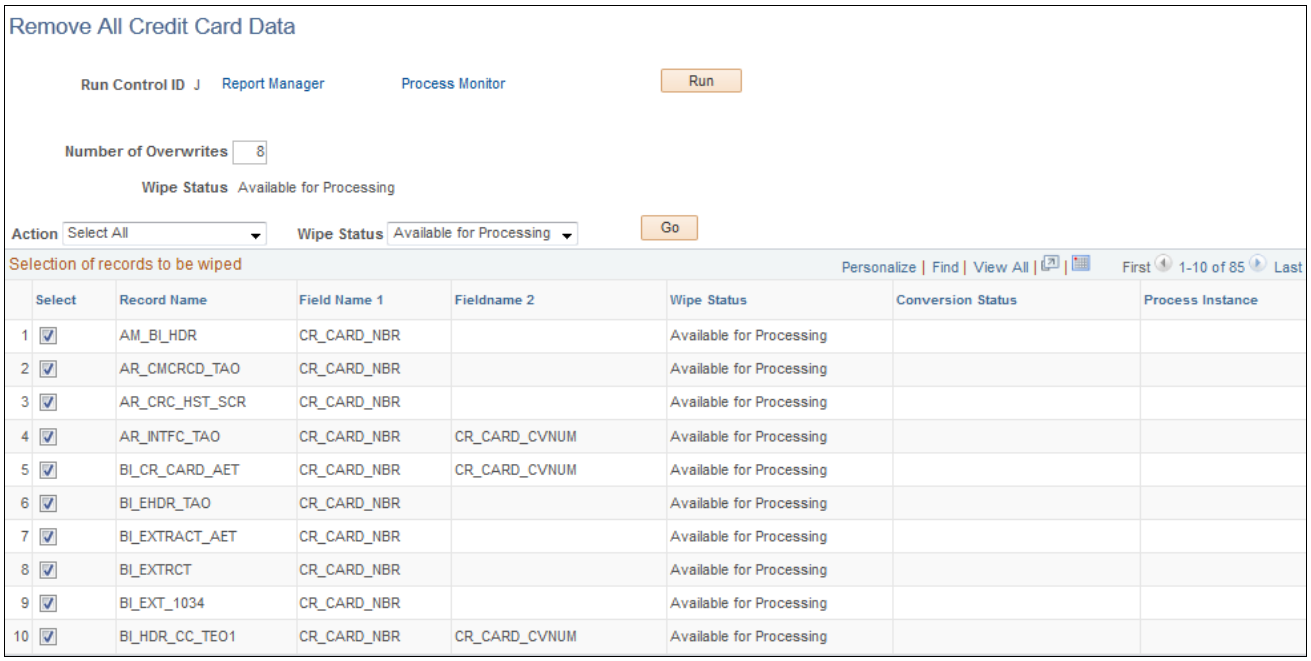
Task 6-14-4: Running the Credit Card Wipe Process

To complete the move to a hosted model, you will need to wipe all credit card data in your system.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for more information.

To run the credit card wipe process:

1. Select Set Up Financials/Supply Chain, Upgrade, Credit Card Hosting, Remove Credit Card Data.
2. Enter a Run Control ID.



Remove All Credit Card Data page

3. Enter the number of overwrites.

   The minimum number is eight.
4. In the table, select the check boxes in the rows for the records that you want to be wiped.
5. Click Run to start the wipe process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management Billing Receivables	All	All

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Task 6-15: Upgrading the Credit Card Integration

The Business Interlink credit card integration is no longer supported. You will need to convert any Business Interlink integrations for credit card processing to use the Integration Broker credit card integration solution.

The Integration Broker solution uses the Enterprise Components delivered objects. The EOEC_CCI_SYNC message processes each service request value passed to the EOEC_CCI_TRANSACT field (alias TRANSTYPE). It also supports the new security code (CVV) field as input to the third party processor. The security code field is identified in the EOEC_CCI_CVNUM field (alias CVNUM) of the EOEC_CCI_SYNC message.

The Integration Broker solution has been enhanced to use all of the services listed in the following table:

TRANSTYPE	Description
1	Authorize
2	AuthorizeBill
3	Bill
4	Credit
5	AuthorizeReversal
7	CreateProfile
8	ModifyProfile
9	DeleteProfile
10	AuthorizeProfile
11	AuthorizeBillProfile
12	RetrieveProfile

You will need to modify your existing transformation program to support the new services and field. Transformation programs are not delivered with PeopleSoft FSCM, but a sample is provided in Knowledge Document ID 986161.1, which you can access on My Oracle Support.

See the information about setting up the credit card interface in the product documentation for PeopleSoft: Integration Interfaces for your new release for more information on the Integration Broker solution.

Properties

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

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Task 6-16: Configuring PeopleSoft Integration with Vertex O

PeopleSoft FSCM 9.2 communicates with the Vertex O Series web service only through PeopleSoft Integration Broker. To integrate with the Vertex O Series tax solution, you must have installed Vertex O Series 5.0 or above and the Vertex PGC (PeopleSoft Generic Connector) both provided through Vertex. A new generic tax message must be activated. Older Vertex specific messages will no longer work.

To configure your PeopleSoft system for integration with Vertex O:

1. Set up your local integration gateway and load the gateway connectors.

   Integration Broker uses the HTTPTARGET connector to communicate with the Vertex web service.
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.
3. On the Queue Definitions page, activate the TAX_INTEGRATION service operation queue.

   For the TAX_INTEGRATION queue, verify that the Queue Status is *Run.*
4. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
5. On the Service Operations - General page, activate the service operations DO_TAXCALC_ REQ and GET_GEOCODE_REQ.

   Oracle delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source, such as Vertex.

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
DO_TAXCALC_ REQ	Outbound	Not applicable	No	Vertex O Series
GET_GEOCODE_REQ	Outbound	Not applicable	No	Vertex O Series

6. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
7. On the Service Operations page, select the Routings tab.
8. Activate the DO_TAXCALC_REQ_V2 and the GET_GEOCODE_REQ_TAX routings for the PSFT_TAX node.
9. For the DO_TAXCALC_REQ_V2 routing, set the PrimaryURL property to the endpoint of the Vertex tax calculation request function.

   Typically this will be: http://<host:port>/pgc/servlet/taxcalc. Replace <HOST:PORT> with the address of the Vertex Peoplesoft Generic Connector.
10. For the GET_GEOCODE_REQ_TAX routing, set the PrimaryURL property to the endpoint of the Vertex tax area request function.

    Typically this will be: http://<host:port>/pgc/servlet/taxarealookup. Replace <HOST:PORT> with the address of the Vertex Peoplesoft Generic Connector.
11. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
12. Activate the PSFT_TAX node.

To test the Vertex O Series integration, click the Test Tax Install button on the Tax Provider Installation page. The system will send a test transaction to Vertex and should report a Geocode and nonzero tax amount. If an error message appears or the tax amount is zero, then there is a problem with the tax installation that must be corrected.

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Properties

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

Task 6-17: Setting Up SES Global and Component Search

This section discusses:

- Understanding Search Configuration Using SES
- Defining New Roles for Global Search
- Displaying Search Groups in the Search Header
- Configuring the Portal Node for PeopleSoft FSCM
- Upgrading File Attachments
- Deploying and Indexing Oracle-Delivered Searches

Understanding Search Configuration Using SES

PeopleSoft Search Framework is a PeopleSoft PeopleTools indexed search technology that relies on the Oracle Secure Enterprise Search (SES) engine by way of PeopleSoft Integration Broker. PeopleSoft Integration Broker provides the interface between PeopleSoft Search Framework and the Oracle SES engine to deploy the search definitions, build the indexes, and return the search results.

Important! Before installing Oracle's Secure Enterprise Search (SES), we highly recommend that you review our deployment and sizing recommendations provided in 'Oracle Secure Enterprise Search Deployment Considerations for PeopleSoft 9.2' (Document ID: 1684035.1) found on My Oracle Support. This article provides information regarding the essential hardware for SES and information to help ensure capacity for peak concurrent usage of your PeopleSoft 9.2 environment. Failing to follow these recommendations can impact the performance and stability of your PeopleSoft 9.2 environment.

PeopleSoft Financials and Supply Chain Management has Oracle SES capabilities at the global and component levels for selected functional areas. The Global Search capability allows searching across specific procure-to-pay functional areas directly from the portal keyword header. The component search capability provides more advanced component searching within the same procure-to-pay functional areas.

In addition, Oracle SES is implemented in specific products and functionality where Verity was provided in releases prior to PeopleSoft 9.2. Before setting up Oracle SES Global Search and component search, you should review the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for more information about PeopleSoft Search for PeopleSoft Financials and Supply Chain Management, to determine the extent to which Oracle SES can be enabled for your environment.

Note. You should only perform these steps if you have completed the tasks discussed in the PeopleTools installation guide for your database platform for the new release, chapter "Configuring Integration Between PeopleSoft PeopleTools and Oracle SES."

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For details about Oracle Secure Enterprise Search configuration for PeopleSoft, see the Search Framework information in the product documentation for PeopleTools: PeopleSoft Search Technology for your new release.

Task 6-17-1: Defining New Roles for Global Search

The roles for Global Search are provided in the new PeopleSoft FSCM release. These roles will enable users to select the various categories from the Search drop-down list related to the keyword search in the portal header, after the search definitions and categories are deployed and built for the desired categories.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for more information about PeopleSoft Search for PeopleSoft Financials and Supply Chain Management.

To enable search for a user, your PeopleSoft Security administrator should add the roles listed in step 3 of the following procedure, depending on the access granted to each user.

To add the roles:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. Add the desired roles from the list of roles in the following table:

Global Search Category	ROLE	Permission List
Accounts Payable	Search Accounts Payable	EPSR1040
Asset Management	Search Asset Management	EPSR1030
Catalog Items *	Search Catalog	EPSR1080
Expenses	Search Expenses	EPSR1050
General Ledger	Search General Ledger	EPSR1060
Procure to Pay	Search PtoP	EPSR1000
Purchasing/Procurement	Search Procurement	EPSR1020
Strategic Sourcing	Search Strategic Sourcing	EPSR1010
Supplier Information	Search Supplier Information	EPSR1080
Supplier Contract Documents	Search Authored Documents	EPSR1090

*Catalog Items search results contain a related action to add the resulting catalog item into a new requisition. You should have the eProcurement Installation option Catalog Search Type set to *SES* instead of *SQL* when using this feature. Select eProcurement, Administer Procurement, eProcurement Installation Options to verify this setting.

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Properties

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

Task 6-17-2: Displaying Search Groups in the Search Header

This section discusses:

- Understanding Displaying Search Groups in the Search Header
- Adding Search Groups to the Home Page Search Context
- Enabling the Global Search Box

Understanding Displaying Search Groups in the Search Header

For a search group to display in the Global Search header and drop-down list, you must add the search group to the home page search context before you can enable the Global Search box in the header.

Adding Search Groups to the Home Page Search Context

To add search groups to the home page search context:

1. Select PeopleTools, Search Framework, Administration, Define Search Context.
2. On the Define Search Context page, open the search context for the context type *Home Page.*

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3. Add the desired search groups, as shown in the following table.
   This table lists the fields and values in the Define Search Context page example for Home Page.

Description	Search Category
Accounts Payable	EP_PAYABLES
Asset Management	EP_ASSETS
Catalog Items	EP_CATALOG_ITEMS
Expenses	EP_EXPENSES
General Ledger	EP_GENERAL_LEDGER
Procure To Pay	EP_PROCURE_TO_PAY
Purchasing/Procurement	EP_PROCUREMENT
Strategic Sourcing	EP_SOURCING
Supplier Information	EP_VENDORS
Supplier Contract Documents	EP_CS_AUTHORED_DOC

Enabling the Global Search Box

To enable the Global Search box in the header:

1. Select PeopleTools, Portal, General Settings.
2. Select the "Display global search in header" check box to turn on Global Search.
3. Click Save.

Properties

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

Task 6-17-3: Configuring the Portal Node for PeopleSoft FSCM

In this step you configure the portal node in your new release PeopleSoft FSCM environment.

To configure the portal node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the portal node *PSFT_EP* (or the name of your default local

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node for FSCM).

The Node Definitions page appears.

3. On the Node Definitions page, select the Portal tab to access the Portal page.
4. On the Portal page, in the Content URI Text field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.

   For example: http://<server>:<port>/psp/pshome/
5. In the Portal URI Text field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.

   For example: http://<server>:<port>/psc/pshome/
6. Click Save.
7. Click Return to Search (optional).

Properties

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

Task 6-17-4: Upgrading File Attachments

A new column, SES URL Equivalent, has been added to the Administer File Attachments page as of PeopleSoft FSCM 9.2. This new column creates and displays the SES URL equivalent when you click Save. The system displays values with the format PSSESATT_<#> in this column. The system creates values based on the number of non-URL attachment types that are defined.

Changes to the Administer File Attachments page are automatically reflected on the PeopleTools URL page. You should never make changes to the URLIDs named PSSESATT_<#> on the PeopleTools URL page. If PeopleSoft Search is enabled, these URLs should be reflected in the PeopleSoft Search Framework Attachment URLID List.

To access the Attachment URLID List, select PeopleTools, Search Framework, Administration, Attachment URLID List. For additional information about the Attachment URLID List, see the Search Framework information in the product documentation for PeopleTools: PeopleSoft Search Technology for your new release.

Note. URLs for SES are only created for servers that are not already defined as a URL type.

To upgrade file attachments:

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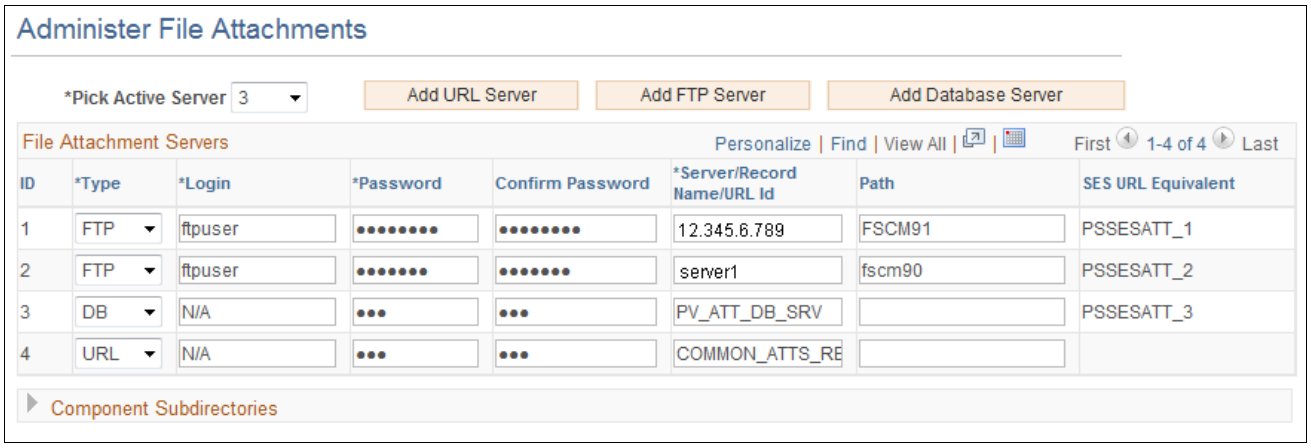
1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.

   The Administer File Attachments page setup will look similar to the following example, with your own definitions.



   Administer File Attachments page

2. Make a small change on the Administer File Attachments page and click Save.

   This change can be reversed later if desired.

   Note that the last column, SES URL Equivalent, is populated with a default URL value.

3. Select PeopleTools, Utilities, Administration, URLs, and verify that the URLs are automatically created in the PeopleSoft URL definitions.

   These URLs should be created with the PSSESATT_* prefix. The number depends on the number of URLs listed in the Administer File Attachments page in step 1. Verify that they are created correctly.

4. For PeopleSoft Search, follow these steps:

   a. Select PeopleTools, Search Framework, Administration, Attachment URLID List.

   b. Add the URLs created in step 1 to the Attachment URLID List.

   c. Click Save.

Properties

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

Task 6-17-5: Deploying and Indexing Oracle-Delivered Searches

This section discusses:

- Understanding Deploying and Indexing Searches Delivered by Oracle
- Verifying that Roles are Assigned to the User
- Deploying and Indexing Search Definitions

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Understanding Deploying and Indexing Searches Delivered by Oracle

Oracle delivers PeopleSoft FSCM search modules for which predefined global and component keyword searches are provided. Before you can deploy the search definitions, you must verify that the roles are assigned to the user.

Verifying that Roles are Assigned to the User

To verify that the necessary roles are assigned to the user:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. Verify that the following roles are assigned to the user, as needed:
    - Search Query Administrator—needed to access queries associated with all search definitions, for the callback user as well as for any user who will need to modify these queries
    - Search Server—needed only for the user setup as the callback user for the search instance
    - Search Administrator—needed for any user who will be allowed to submit jobs for indexing
    - Search Developer—needed for any user who will be granted access to the design of search definitions

Note. The search callback user must be assigned the Search Query Administrator and Search Server roles. The callback user is listed on the Search Instance page, which you can access by selecting PeopleTools, Search Framework, Administration, Search Instance.

Deploying and Indexing Search Definitions

The following table lists the PeopleSoft FSCM search modules for which predefined application and component keyword searches are provided.

Global Search Category	ROLE	Permission List
Accounts Payable	Search Accounts Payable	EPSR1040
Asset Management	Search Asset Management	EPSR1030
Catalog Items *	Search Catalog	EPSR1080
Expenses	Search Expenses	EPSR1050
General Ledger	Search General Ledger	EPSR1060
Procure to Pay	Search PtoP	EPSR1000
Purchasing/Procurement	Search Procurement	EPSR1020
Strategic Sourcing	Search Strategic Sourcing	EPSR1010
Supplier Information	Search Supplier Information	EPSR1080

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Global Search Category	ROLE	Permission List
Supplier Contract Documents	Search Authored Documents	EPSR1090

For each of the search definitions that Oracle delivers, you need to deploy and then index the search definitions.

To deploy and index search definitions and deploy search categories:

1. Select PeopleTools, Search Framework, Administration, Deploy/Delete Object and deploy a search definition.
2. Select PeopleTools, Search Framework, Administration, Schedule Search Index and run the process to index the search definition.
3. Repeat steps 1 and 2 for each search definition.
4. Deploy search categories as follows:
   a. Select PeopleTools, Search Framework, Administration, Deploy/Delete Object.
   b. On the Deploy Search Category tab, select an search category that is listed in the table at the beginning of this step.
   c. Select the Deploy button.

      Note. You will be unable to deploy the categories unless all search definitions within the category are deployed first. To make sure that all search definitions that belong in the category are deployed, click the Deploy Related Definition link.

   d. Repeat steps 4a to 4c for each search category.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for more information about PeopleSoft Search for Financials and Supply Chain Management.

For the Search Framework documentation in PeopleTools, see the product documentation for PeopleTools: PeopleSoft Search Technology for your new release.

Properties

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

Task 6-18: Reconciling Notification Templates

In this task, you reconcile updates to component and generic notification templates with changes that you made to customize these templates. You should review the notification text and variables.

To access component notification template information, select PeopleTools, Workflow, Notifications, Notification Templates.

To access component notification template variables, select PeopleTools, Workflow, Notifications, Template Variables.

To access generic template information, select PeopleTools, Workflow, Notifications, Generic Templates.

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Properties

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

Task 6-19: Reviewing Approval Workflow Framework

The approval workflow framework is enhanced in the new PeopleSoft FSCM release to offer more scalability. Changes were made to how approval processes are defined and to the performance of the approval workflow engine.

If your product uses the approval workflow framework, review the following reference and, if applicable, any product-specific PeopleBook documentation about your use of the framework.

See the product documentation for PeopleSoft: Approval Framework.

Properties

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

Task 6-20: Completing Billing Setup

This section discusses:

- Creating Recommended Manual Indexes
- Defining Reason Codes for Billing Adjustments

Task 6-20-1: Creating Recommended Manual Indexes

PeopleSoft Billing has published recommended index modifications that may apply to your installation. These index options depend on your installation and therefore cannot be included in the delivered application.

For the latest information regarding billing index recommendations, go to My Oracle Support and search for Knowledge Document ID 1103013.1.

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Properties

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

Task 6-20-2: Defining Reason Codes for Billing Adjustments

Billing Adjustments now require a reason code to be entered. You may want to set up the reason codes that you intend to use for adjustments. If you do not define new reason codes, only existing ones will be available when creating a Billing Adjustment. The Reason Code field is required to save the adjustment.

To define reason codes for Billing Adjustments:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes.
2. Enter values in the setID and Reason Type Credit Memo fields.
3. Enter the new reason code and a description.
4. Click Save.

Properties

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

Task 6-21: Setting Up Prefixes for Purchasing Document IDs

Currently, the last sequence number for purchase orders, receipts, and return to vendor documents is stored on the purchase order business unit. The last sequence number for requisitions is stored in the Auto Numbering by Business Unit table; however, you cannot customize the sequence prefix or number. During the upgrade, the last number issued for requisition entries with the default system sequence prefix of *000* or *N/A* in the Auto Number by Business Unit table will be migrated to the respective purchase order business unit. If you have any customizations in Auto Numbering by Business Unit, you will need to migrate those manually to the Auto Number table.

As of PeopleSoft FSCM 9.2, you have the option to set up document numbers with a prefix by configuring the Auto Numbering table for purchase orders, requisitions, receipts, and return to vendor documents.

To set up prefixes for purchase orders, requisitions, receipts and return to vendor documents:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. To enable automatic numbering for purchase orders, add a new Auto Numbering record as follows:
   a. Enter a value in the SetID field.
   b. In the Number Type field, select *Purchase Order* from the drop-down list box.
   c. Click Add.

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d. In the Field Name field, select *PO_ID* from the drop-down list box.

e. In the Automatic Numbering Details section, enter values in these fields: Start Seq (prefix), Max length, Description, and Last Number Issued.

Note. The value in the Default? field will have no effect on these documents.

f. Click Save.

3. To enable automatic numbering for requisitions, add a new Auto Numbering record as follows:

a. Enter a value in the SetID field.

b. In the Number Type field, select *Purchasing Requisition* from the drop-down list box.

c. Click Add.

d. In the Field Name field, select *REQ_ID* from the drop-down list box.

e. In the Automatic Numbering Details section, enter values in these fields: Start Seq (prefix), Max length, Description, and Last Number Issued.

Note. The value in the Default? field will have no effect on these documents.

f. Click Save.

4. To enable automatic numbering for receipts, add a new Auto Numbering record as follows:

a. Enter a value in the SetID field.

b. In the Number Type field, select *PO Receipts* from the drop-down list box.

c. Click Add.

d. In the Field Name field, select *RECV_ID* from the drop-down list box.

e. In the Automatic Numbering Details section, enter values in these fields: Start Seq (prefix), Max length, Description, and Last Number Issued.

Note. The value in the Default? field will have no effect on these documents.

f. Click Save.

5. To enable automatic numbering for return to vendor documents, add a new Auto Numbering record as follows:

a. Enter a value in the SetID field.

b. In the Number Type field, select *Return to Vendor (Supplier)* from the drop-down list box.

c. Click Add.

d. In the Field Name field, select *RTV_ID* from the drop-down list box.

e. In the Automatic Numbering Details section, enter values in these fields: Start Seq (prefix), Max length, Description, and Last Number Issued.

Note. The value in the Default? field will have no effect on these documents.

f. Click Save.

6. Review the Tableset Controls page to verify that the setIDs are correctly assigned to the appropriate set control values (purchase order business units) as follows:

a. Select PeopleTools, Utilities, Administration, TableSet Control.

b. Verify the setup for PO Auto Numbering Record Group ID PO_17.

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c. Verify the setup for Receiving Auto Numbering Record Group ID PO_18.

d. Verify the setup for RTV Auto Numbering Record Group ID PO_19.

7. Establish the sequence to be used for purchase order business units as follows:

a. Select Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition.

b. Select a purchase order business unit definition.

c. On the Document Numbering tab, for each document selected , enter the beginning sequence number to be used.

Note. If you want to continue with the last number from the purchase order business unit, make a note of the last number issued for each document. Then, return to the appropriate Auto Numbering record created in this task and update the Start Seq field to *000* and the Last Number Issued field with the noted number for the document.

d. Click Save.

Refer to the following documentation for more information on setting up automatic numbering and purchase order business units.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for information on defining Financials and Supply Chain Management common definitions.

See the product documentation for PeopleSoft FSCM: Purchasing for your new release for information about defining PeopleSoft Purchasing business units and processing options.

Properties

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

Task 6-22: Setting Up Prefixes for Contract Document IDs

This section discusses:

- Understanding Setting Up Prefixes
- Adding a Prefix for Procurement Contracts
- Adding a Prefix for Master Contracts

Understanding Setting Up Prefixes

Currently, the last document IDs issued for the procurement contracts and master contracts are stored on the Contract and Vendor Rebate Controls page. During the upgrade, the Last Contract ID will be migrated to the Auto Numbering table using the same SetID and the number type *PCNT*. The Master Contract ID will be migrated to the Auto Numbering table using the same SetID and the number type *MCNT*.

You can set up additional values by following the instructions in this task.

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For more details on automatic numbering, see the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for information on defining Financials and Supply Chain Management common definitions.

Task 6-22-1: Adding a Prefix for Procurement Contracts

To add a prefix for procurement contracts:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. Click Find an Existing Value.
3. Enter values in the SetID and Number Type of Procurement Contract fields.
4. Click Search.
5. Enter a new prefix in the Start Seq field.
6. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Purchasing eProcurement Supplier Contract Management	All	All

Task 6-22-2: Adding a Prefix for Master Contracts

To add a prefix for master contracts:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. Click Find an Existing Value.
3. Enter values in the SetID and Number Type of Master Contract fields.
4. Click Search.
5. Enter a new prefix in the Start Seq field.
6. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Purchasing eProcurement Supplier Contract Management	All	All

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Task 6-23: Completing Services Procurement Setup

This section discusses:

- Understanding the sPro Upgrade
- Running the Post-Upgrade sPro Queries
- Reviewing the Post-Upgrade sPro Queries
- Verifying User Lists for Timesheet Approval
- Defining the Timesheet Approval Process
- Setting Up Automatic Self-Approval for Timesheets
- Verifying User Lists for Expenses Approval
- Defining the Expenses Approval Process
- Verifying User Lists for Progress Log Approval
- Defining the Progress Log Approval Process
- Defining the Invoice Approval Process
- Running the sPro Approvals Post-Upgrade Process

Understanding the sPro Upgrade

As of PeopleSoft FSCM 9.1, Approval Workflow Engine has been implemented for timesheets, expenses, and progress logs. As of PeopleSoft FSCM 9.2, Approval Workflow Engine has also been implemented for invoices. In addition, email approvals are available for timesheets, expenses, progress logs, and work orders. If you are upgrading from a previous release, you must define the Approval Process Definition for the processes SP_TIMESHEET, SP_EXPENSE, SP_PLOG, and SP_INVOICE. Each Approval Process Definition can have various stages, paths, steps, and criteria, or you can define self-approval criteria for each path and step, which will determine the approval routings.

See the product documentation for PeopleSoft FSCM: Services Procurement for your new release.

Task 6-23-1: Running the Post-Upgrade sPro Queries

In this step, you run the PeopleSoft Services Procurement post-upgrade queries.

To run the post-upgrade sPro queries:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following queries:

   ```
   Time Approval, UPG_SPZ01

   Progress Log Approval, UPG_SPZ02

   Expense Approval, UPG_SPZ03

   Invoice Approval, UPG_SPZ04
   ```

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Properties

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

Task 6-23-2: Reviewing the Post-Upgrade sPro Queries

This section discusses:

- Reviewing Query UPG_SPZ01
- Reviewing Query UPG_SPZ02
- Reviewing Query UPG_SPZ03
- Reviewing Query UPG_SPZ04

Reviewing Query UPG_SPZ01

This report lists the setIDs for which timesheet approval process definitions must exist. You will use the results of this query to create timesheet approval process definitions in the step titled Defining the Timesheet Approval Process.

Reviewing Query UPG_SPZ02

This report lists the setIDs for which progress log approval process definitions must exist. You will use the results of this query to create progress log approval process definitions in the step titled Defining the Progress Log Approval Process.

Reviewing Query UPG_SPZ03

This report lists the setIDs for which expenses approval process definitions must exist. You will use the results of this query to create Expenses approval process definitions in the step titled Defining the Expenses Approval Process.

Reviewing Query UPG_SPZ04

This report lists the setIDs for which invoice approval process definitions must exist. You will use the results of this query to create invoice approval process definitions in the step titled Defining the Invoice Approval Process.

Properties

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

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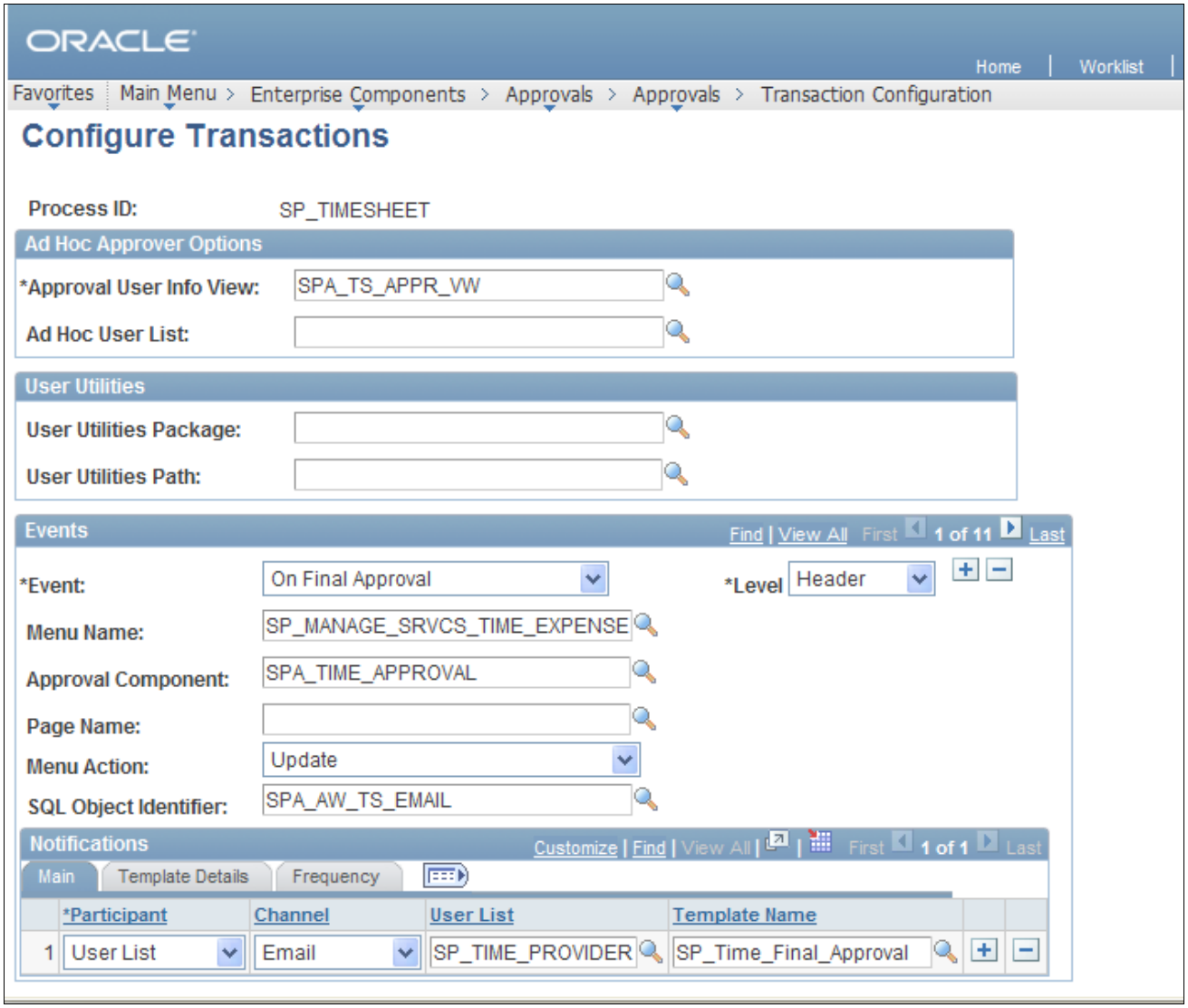
Task 6-23-3: Verifying User Lists for Timesheet Approval

In this step you verify user lists for timesheet approval.

1. Select Enterprise Components, Approvals, Approvals, Transaction Configuration.
2. Edit the configuration for process ID SP_TIMESHEET.
3. Note the names of the user lists in the Notifications section of the Configure Transactions page.



Configure Transactions page: SP_TIMESHEET process

4. Select Enterprise Components, Approvals, Approvals, User List Setup.

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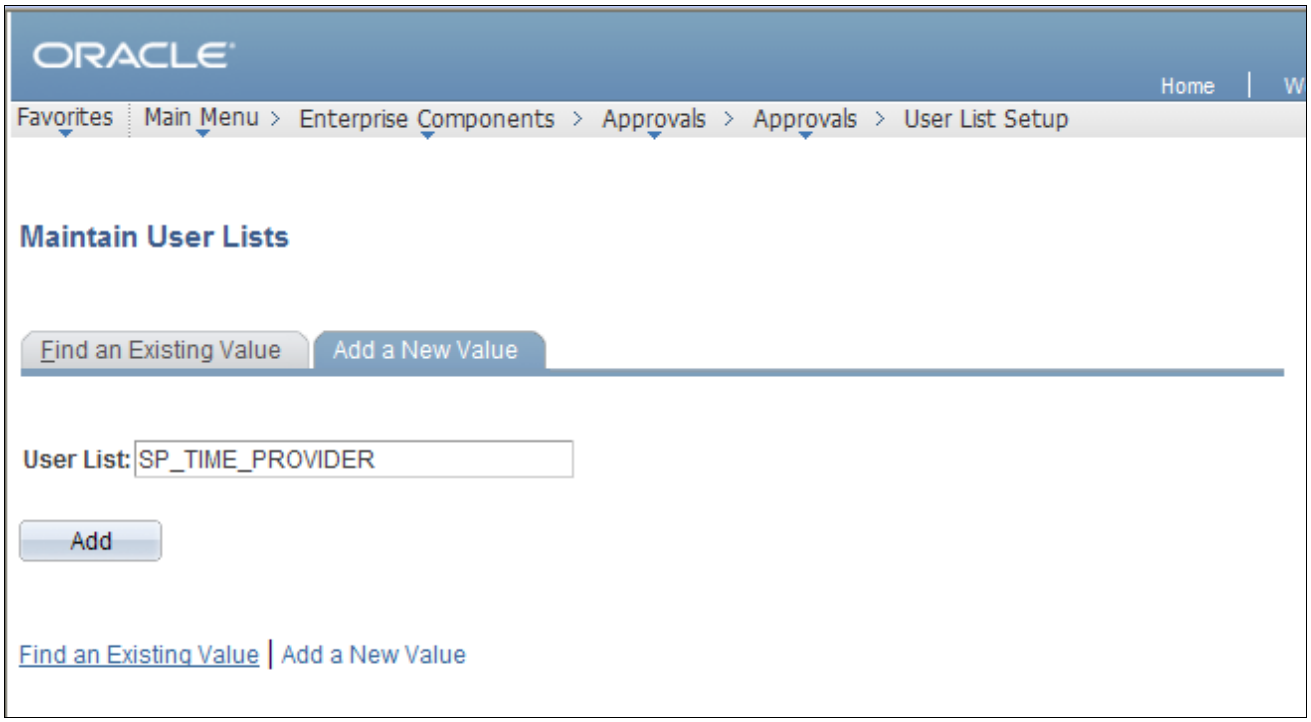
5. On the Maintain User Lists page, make sure that all of the user lists used in the configuration for SP_TIMESHEET have been defined.

   If not, use the existing user lists in the transaction configuration or add the user lists.



Maintain User Lists page

Properties

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

Task 6-23-4: Defining the Timesheet Approval Process

This section discusses:

- Understanding Timesheet Approval Process Setup
- Setting Up a User List
- Creating a Timesheet Approval Process Definition
- Defining the EMP_SERVLET URL

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Understanding Timesheet Approval Process Setup

In this step, you add a timesheet approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ01 to determine the setIDs for which new timesheet approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the applicable steps below to update an existing approval process definition.

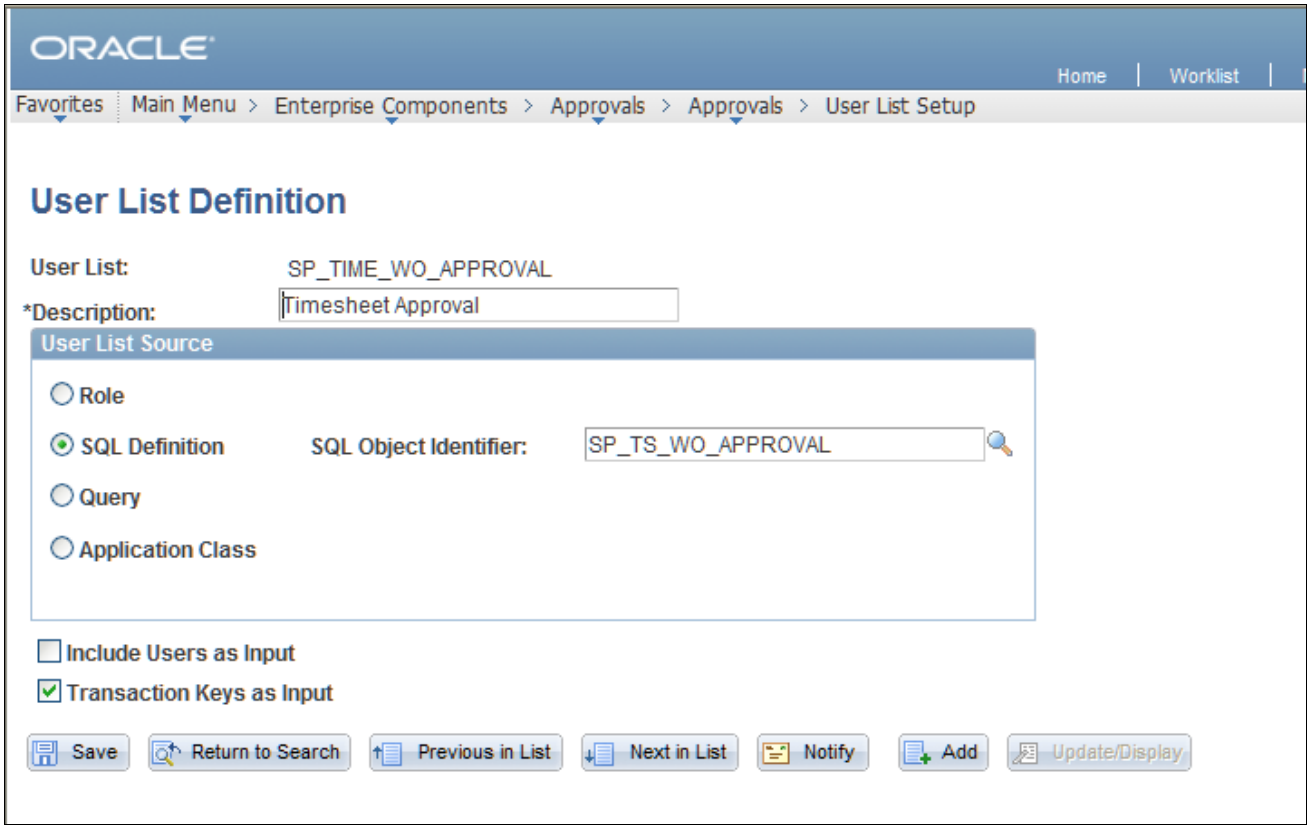
Setting Up a User List

To define the timesheet approval process:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

   In the example below, the user list SP_TIME_WO_APPROVAL is used for the approval process definition for timesheet approval.



User List Definition page

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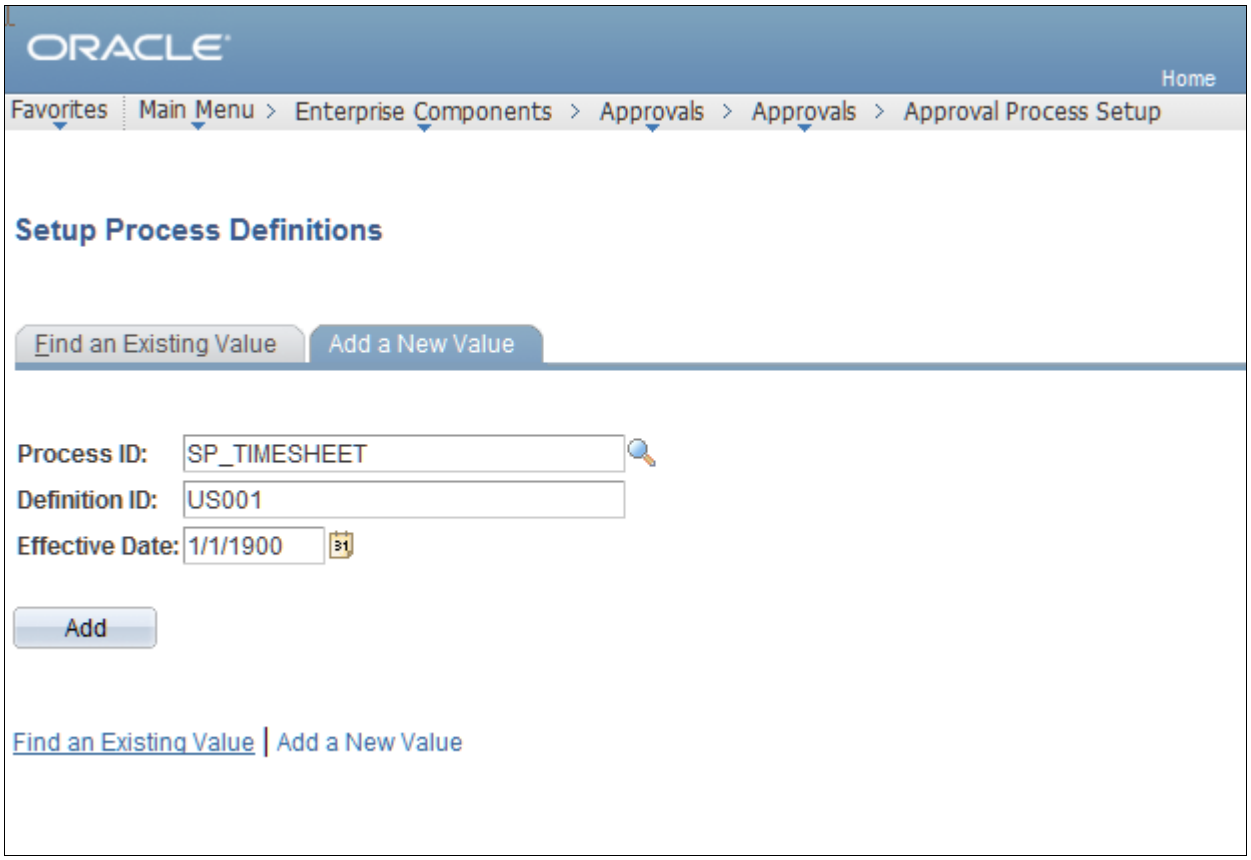
Creating a Timesheet Approval Process Definition

You will need to create an approval process definition for each definition ID. Refer to the results of query UPG_SPZ01 for the list of definition IDs for which you should create a process definition.

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_TIMESHEET*.
4. In the Definition ID field, enter the setID for which the definition is being created.
5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_TIMESHEET*, the definition ID *US001*, and the effective date. Then click Add.



Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definitions page, click the Definition Criteria link.

   The Criteria Definition page appears.
7. For the Root Package ID field, select *SCM_APPROVAL_DEFN_CRITERIA*.

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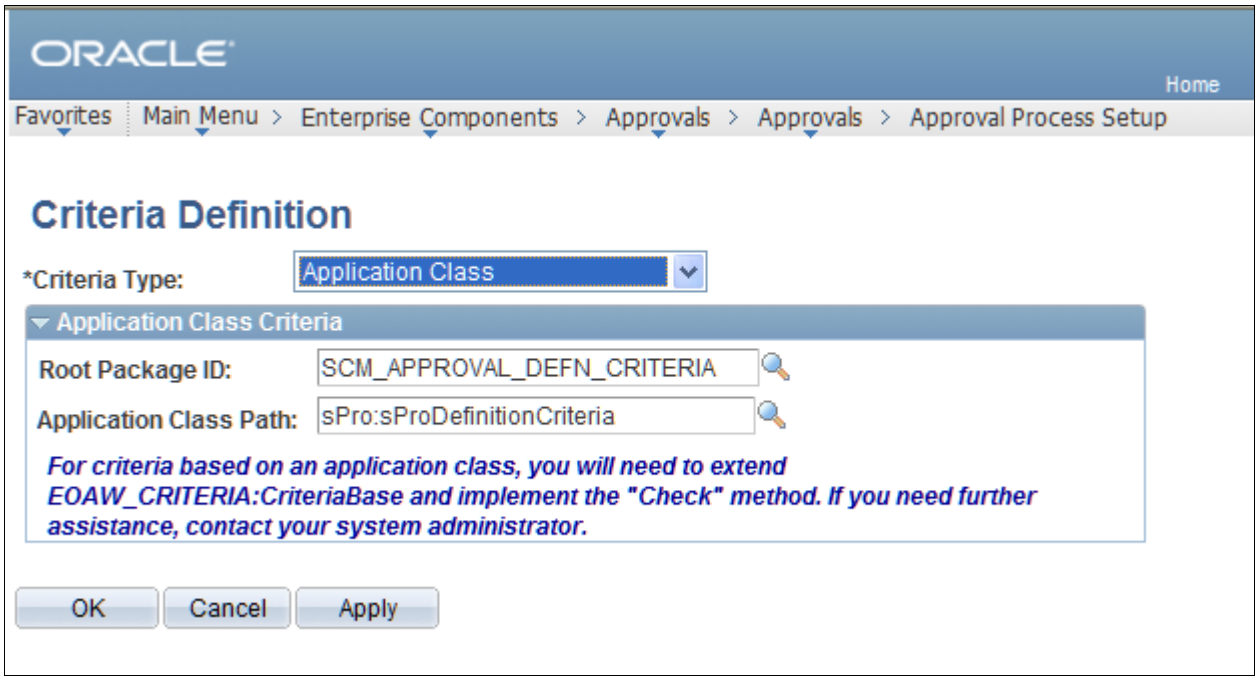
8. For the Application Class Path field, select *sPro:sProDefinitionCriteria.*



Criteria Definition page: Application Class Criteria

9. Click OK.

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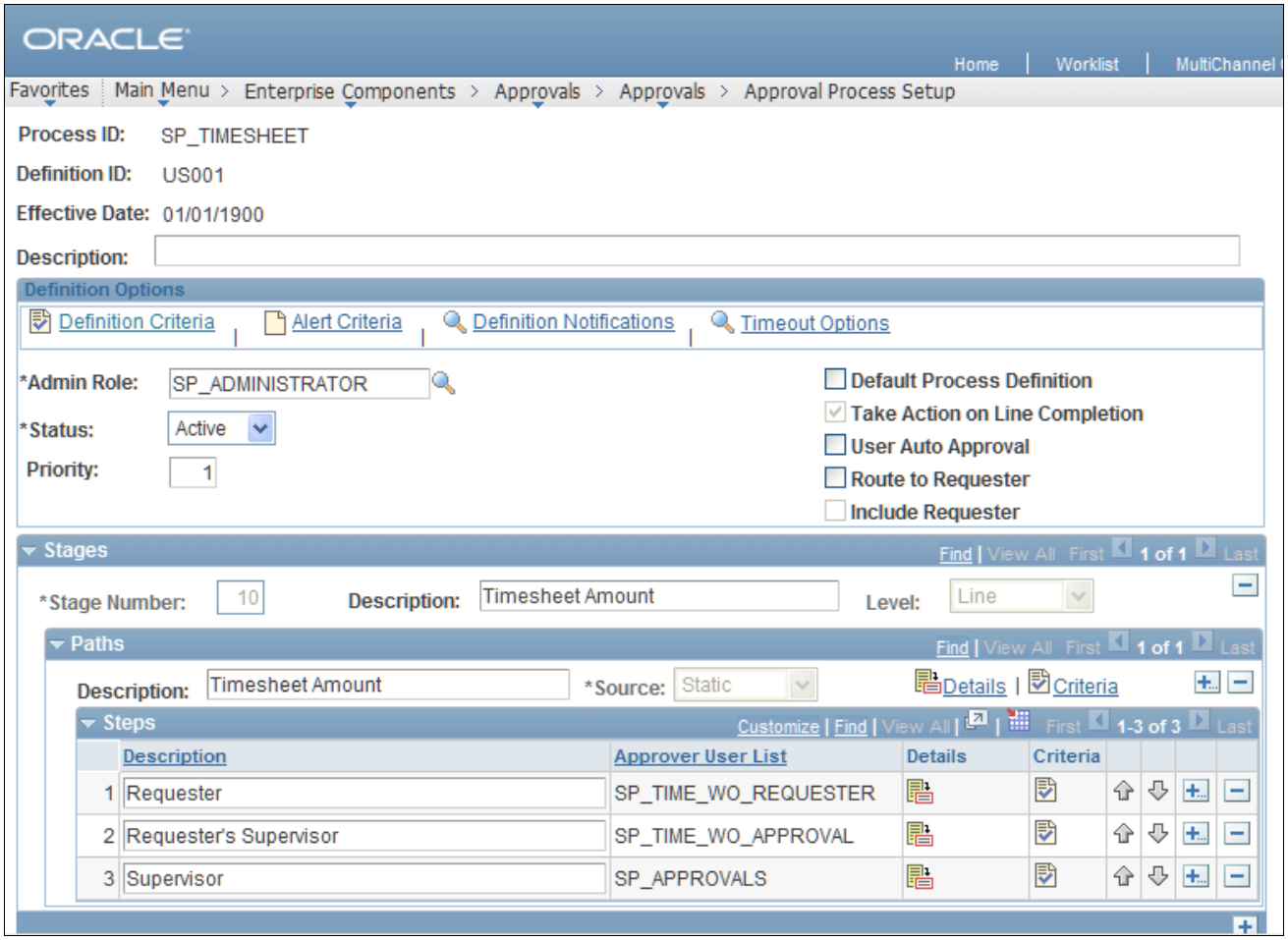
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    For example, this process definition has a Line stage and 3 steps defined.



Setup Process Definitions page: Stages and Paths

11. For each stage, enter a description and select a level of *Header* or *Line*.
12. For each path, enter a description and select the source as *Static* or *Dynamic*.
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.

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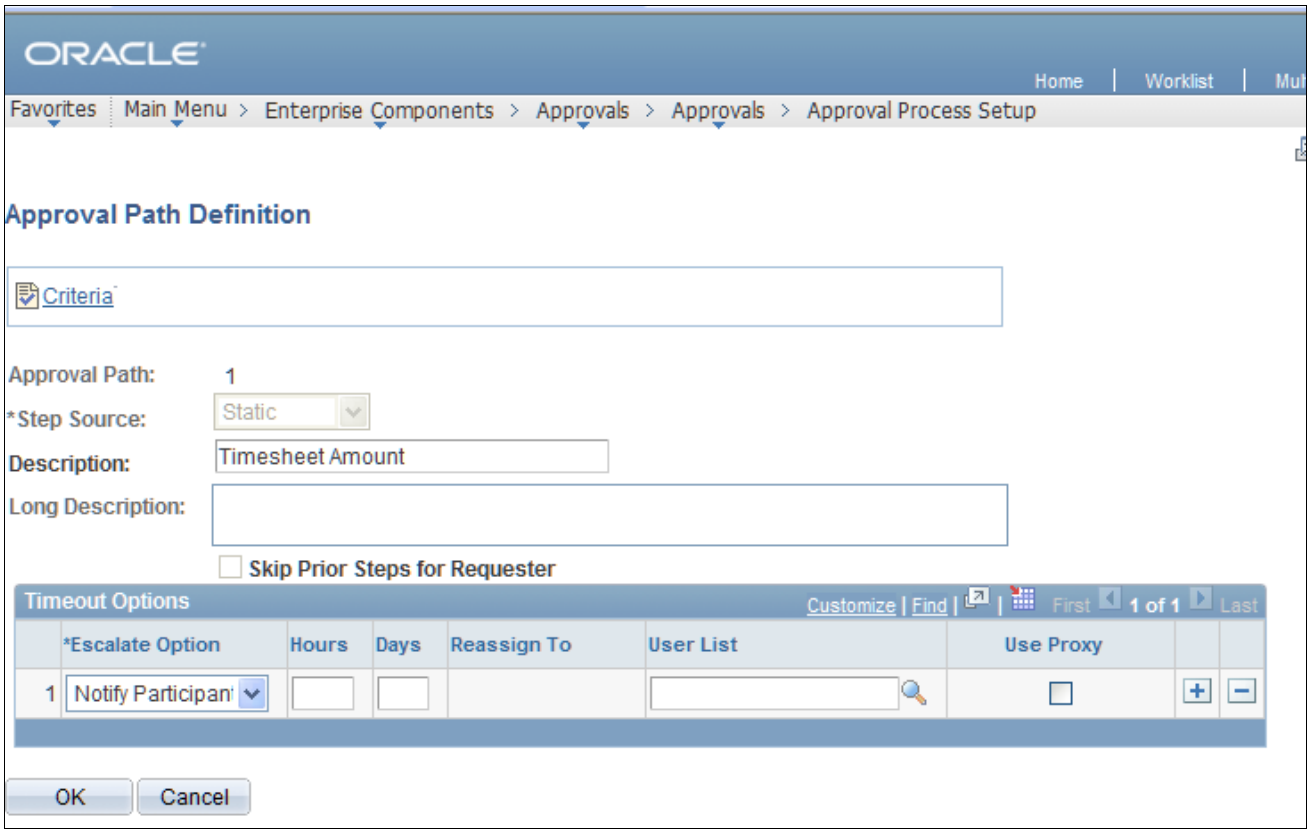
14. Click the Details icon for each path and set up the path details, as required



Approval Path Definition page

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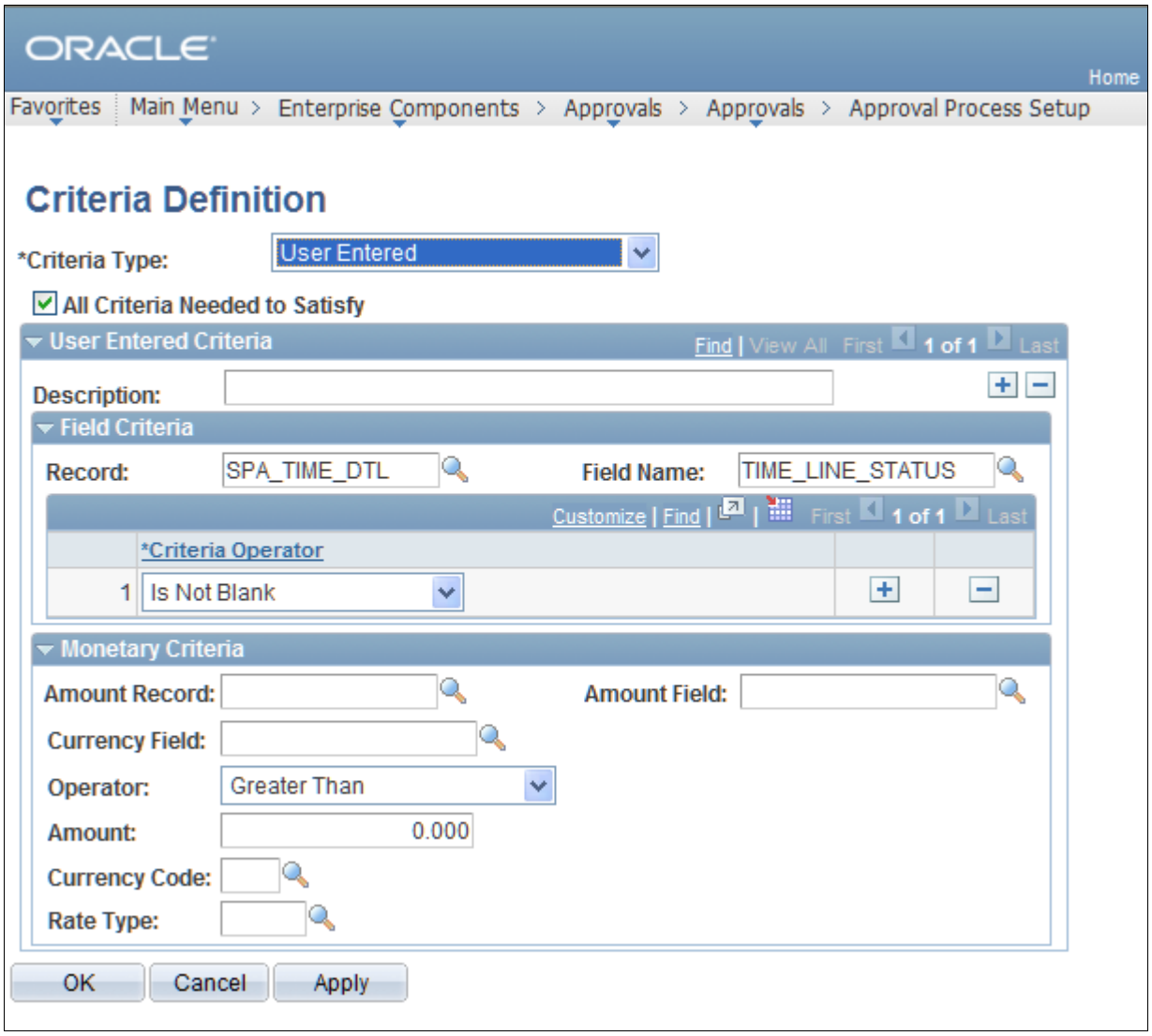
15. Click the Criteria icon for each path and set up path criteria, as required.

    For example, this path criteria definition has the field criteria defined with the record set to *SPA_TIME_DTL*, the field name set to *TIME_LINE_STATUS*, and the criteria operator set to *Is Not Blank*.



Criteria Definition page: Path Criteria

16. Click the Details icon for each step and set up the step details, as required.

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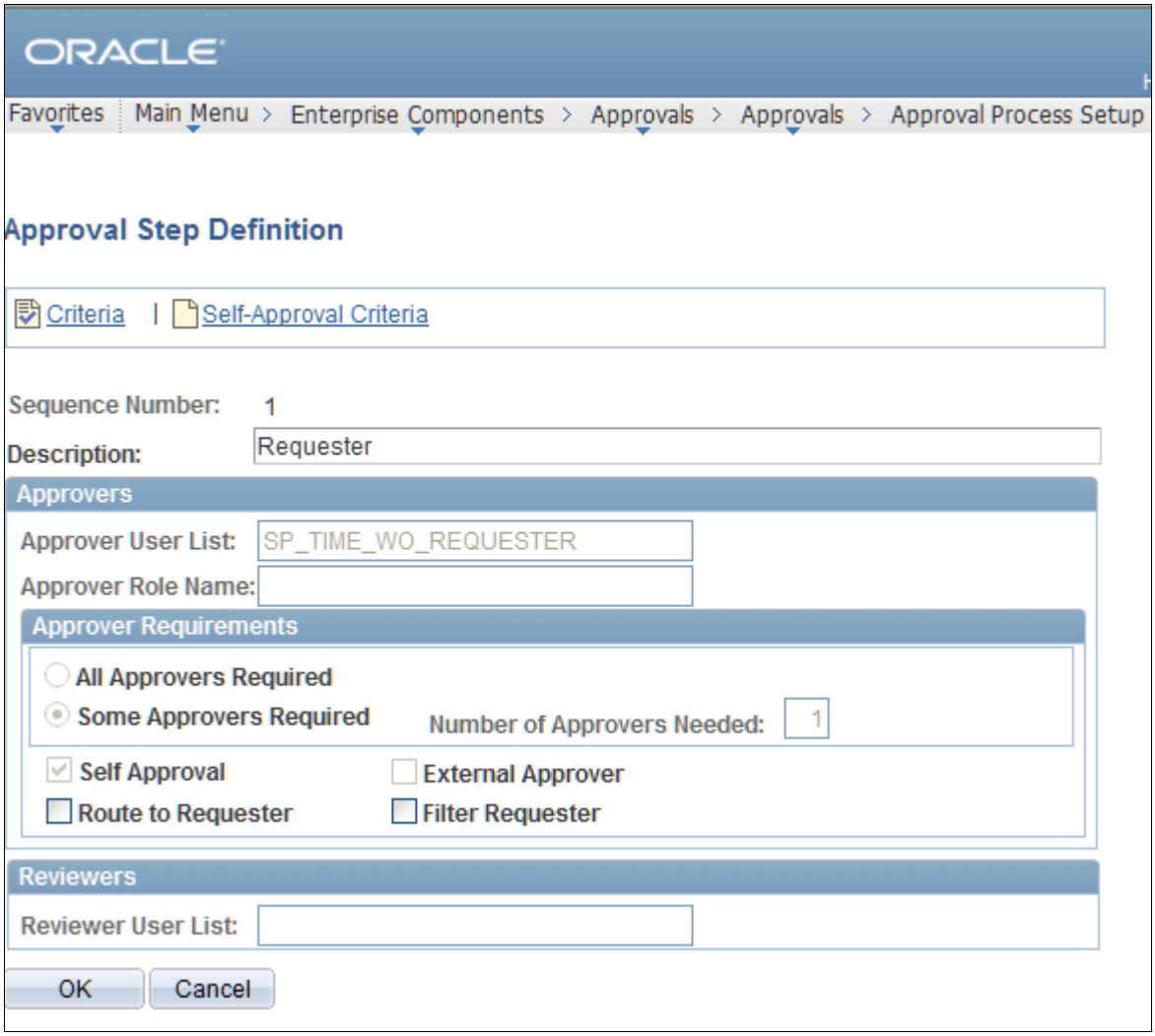
17. Click the Self-Approval Criteria link to set up self-approval criteria.

    You can define field criteria or monetary criteria.



Approval Step Definition page

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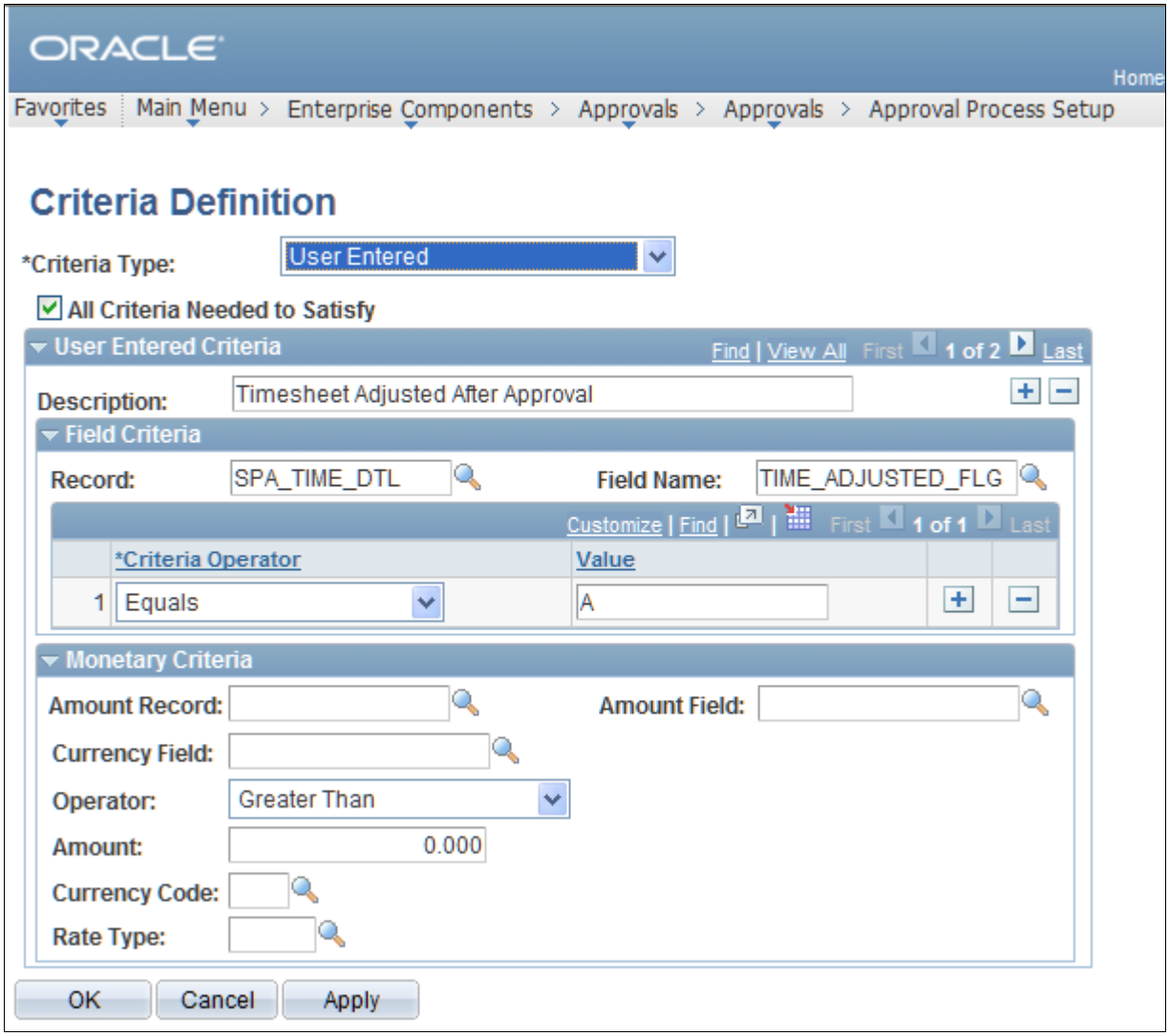
18. Click the Criteria icon for each step and set up step criteria, as required.

    You can define field criteria or monetary criteria.

    In this example, for approvals after adjustments to work, the following field criteria should be set up. Set the record to *SPA_TIME_DTL*, the field name to *TIME_ADJUSTED_FLG*, the criteria operator to *Equals*, and the value to *A*.



Criteria Definition page: Timesheet Adjusted After Approval criteria

19. Repeat steps 1 through 18 for each approval process definition that you need to create.

Defining the EMP_SERVLET URL

To define the EMP_SERVLET URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.

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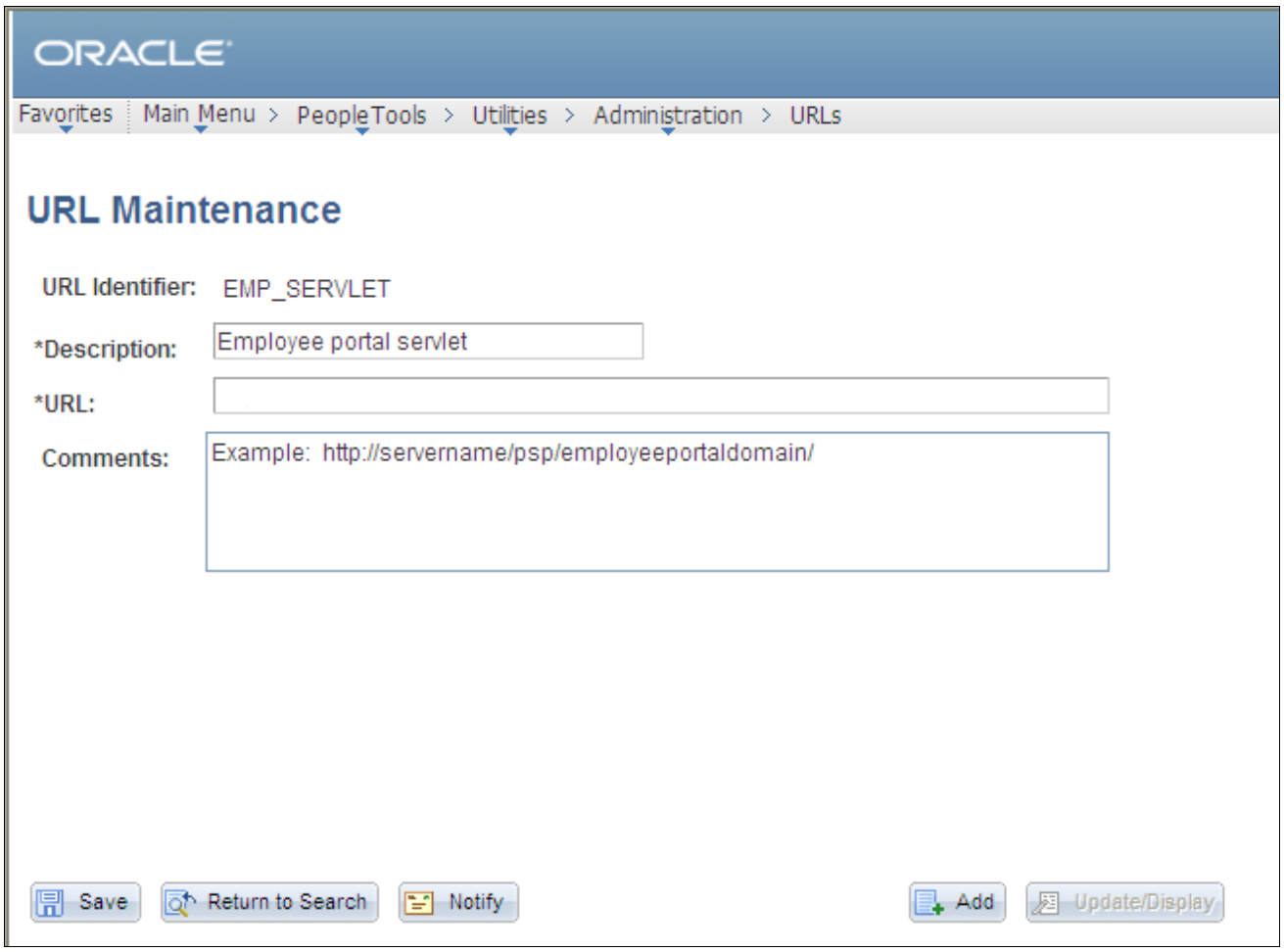
3. To define the EMP_SERVLET URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.

Properties

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

Task 6-23-5: Setting Up Automatic Self-Approval for Timesheets

This section discusses:

- Understanding Automatic Self-Approval Setup
- Creating and Assigning the Self-Approval Role

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- Creating a User List
- Creating an Approval Process Definition and Assigning the User List

Understanding Automatic Self-Approval Setup

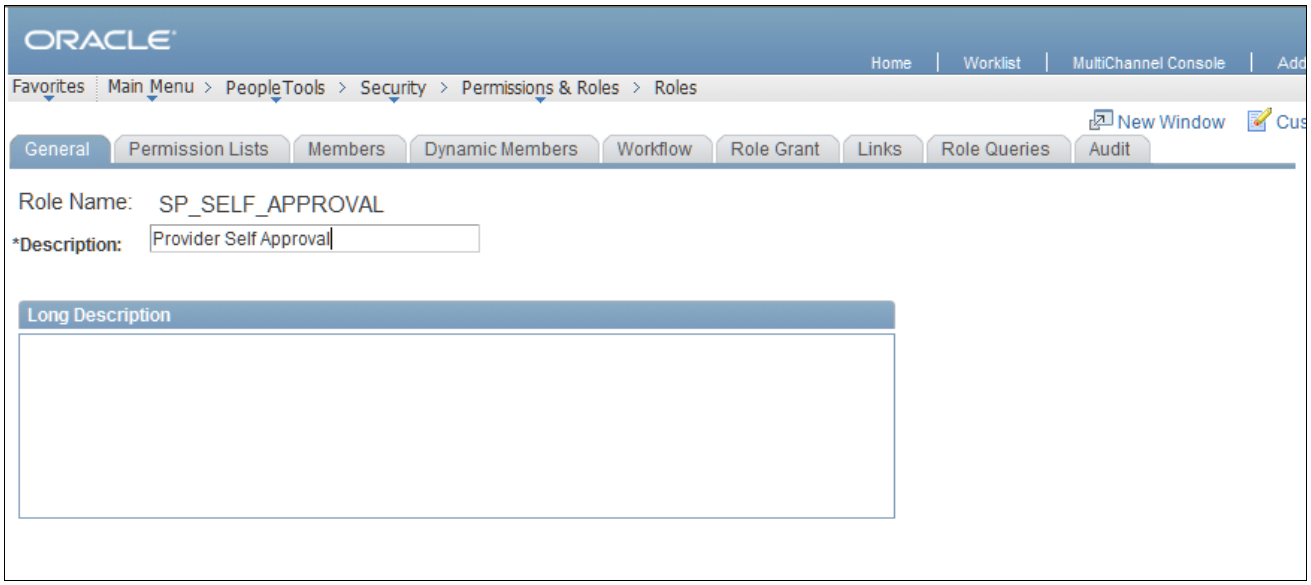
For all providers listed in the results of query UPG_SPZ01 who had the Auto Approve Timesheet option selected, complete this task to set up self-approvals so that the timesheets will be automatically approved.

Creating and Assigning the Self-Approval Role

To create and assign the self-approval role:

1. Select PeopleTools, Security, Permissions & Roles, Roles.
2. Select the Add a New Role tab.
3. Enter the name of the new role that you want to create.

   In this example, the role SP_SELF_APPROVAL is created.



Roles page

4. Enter a description for the role.
5. Click Save.
6. Select PeopleTools, Security, User Profiles, User Profiles.
7. Select the Find an Existing Value tab.
8. Enter the user ID of a user to whom the new role needs to be assigned and click Search.
9. Select the Roles tab.
10. Click the Add (+) button to add the new role.

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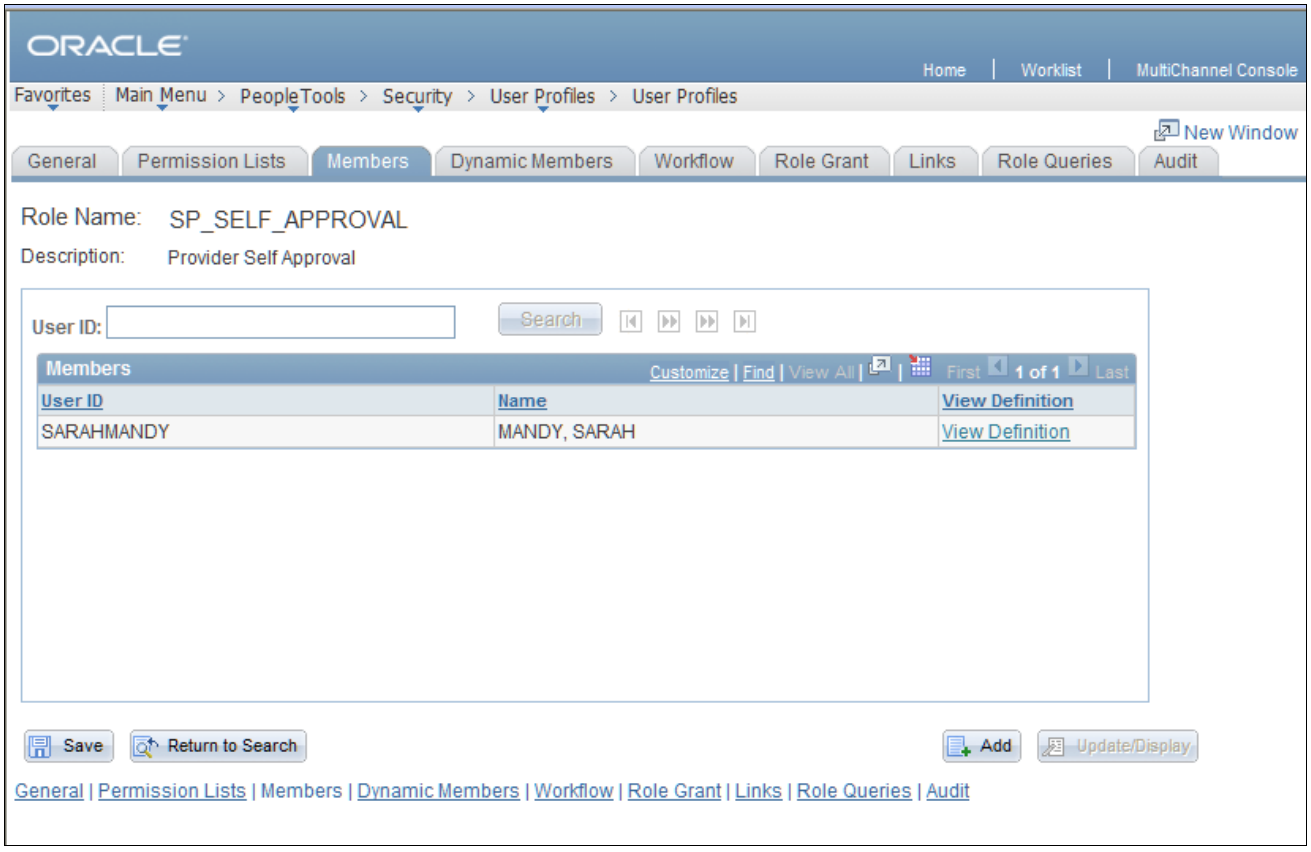
11. Click Save.

    In this example, the role SP_SELF_APPROVAL is assigned to SARAHMANDY.



User Profiles page

12. Repeat steps 6 through 11 to assign the new role to each of the providers listed in the results of query UPG_SPZ01.

Creating a User List

To create a user list for the self-approval role.

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab.
3. Enter a user list name and click Add.
4. Enter a description for the user list.
5. Ensure that the user list source *Role* is selected.

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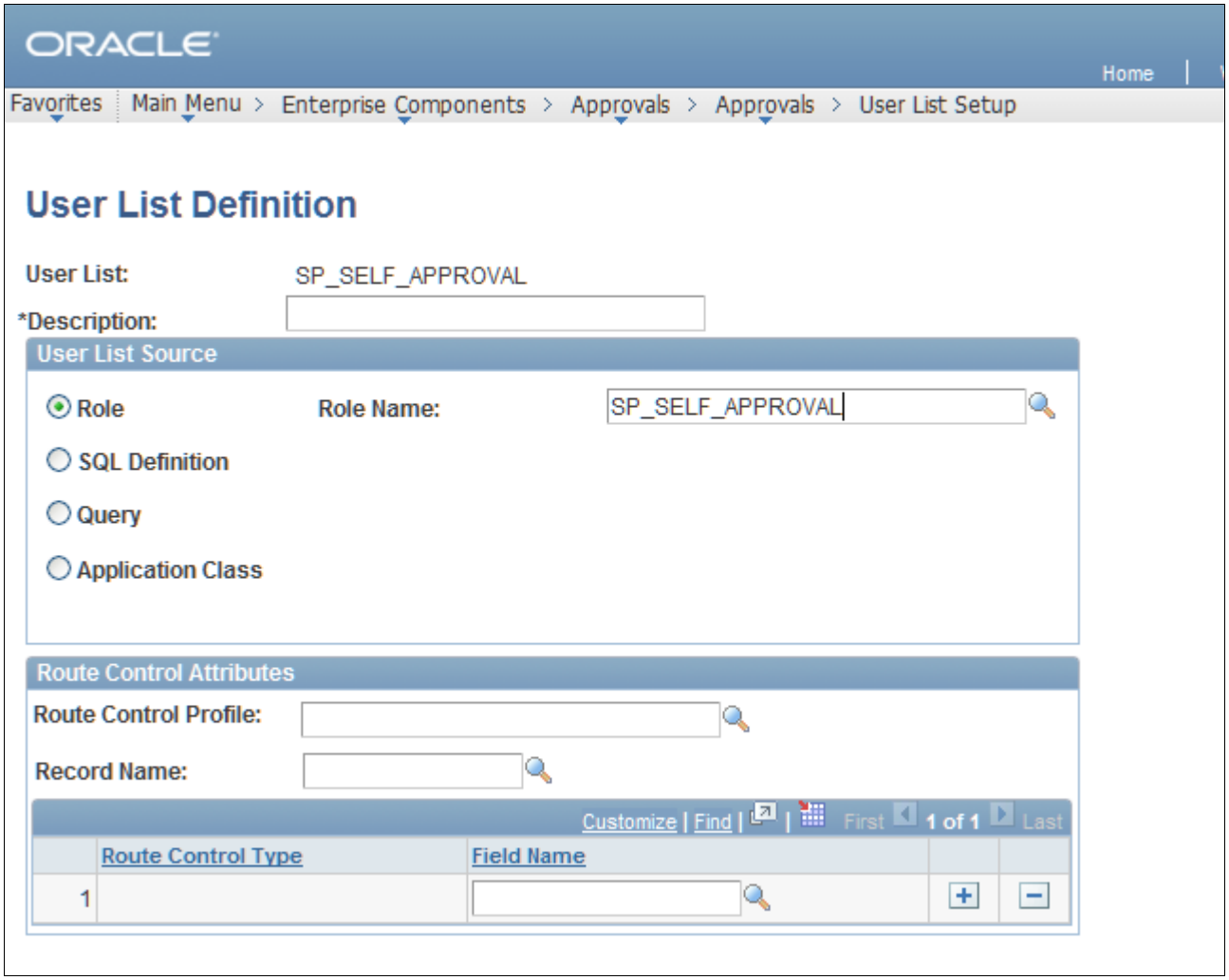
6. Select the name of the self-approval role that you created.
   In this example, a user list is created for the role SP_SELF_APPROVAL.



User List Definition page

7. Click Save.

Creating an Approval Process Definition and Assigning the User List

To create an approval process definition and assign the user list:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Definition.
2. Select the Find an Existing Value tab.
3. In the Process ID field, enter *SP_TIMESHEET* and click Search.

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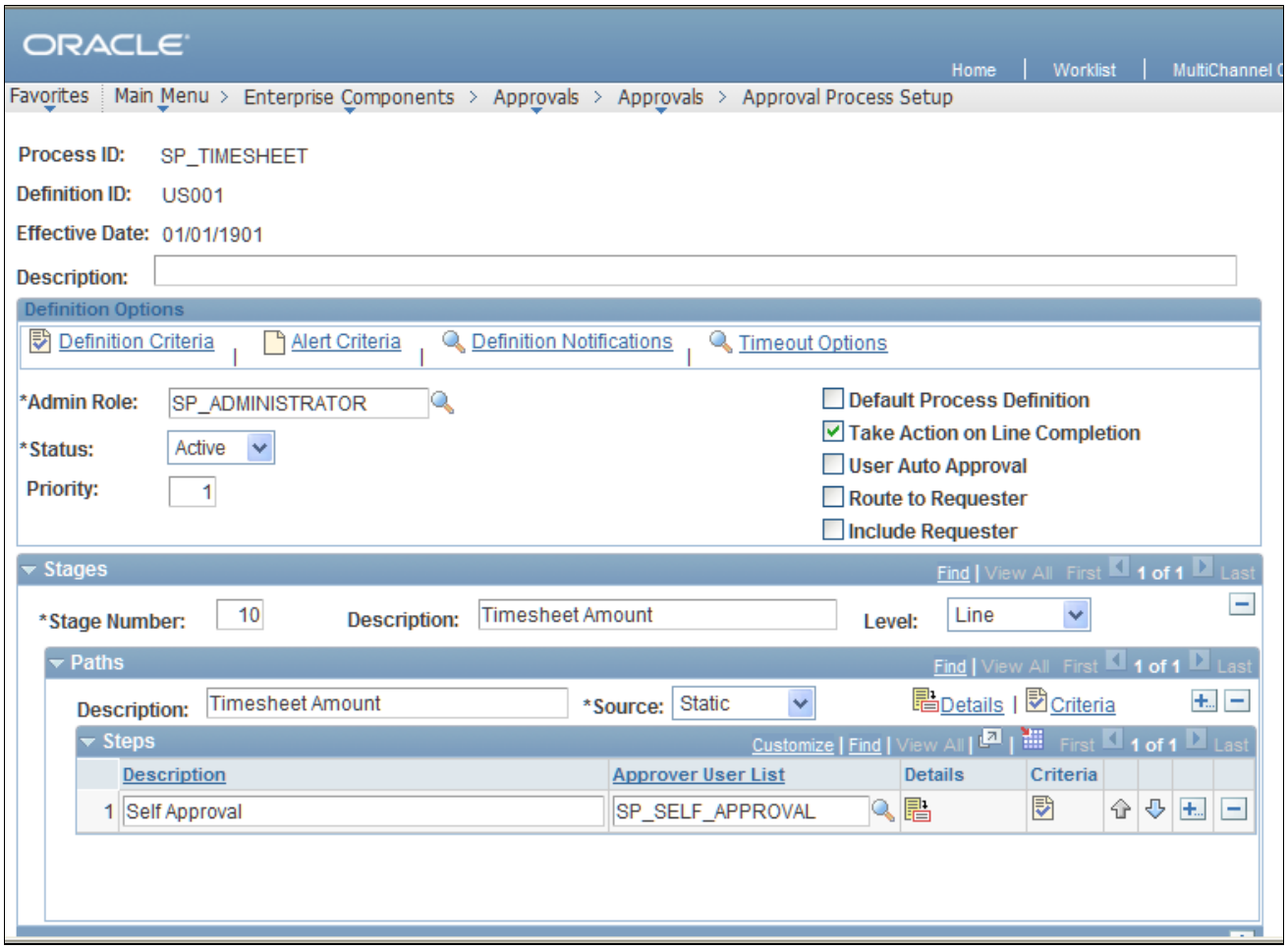
4. Select an appropriate value for the definition ID.



Approval Process Definition page

5. In the Steps section, click the Add (+) button to add a new step.
6. Enter a description for the step.
7. In the Approver User List field, select the new user list that you created for the self-approval role.
8. Click Save.
9. On the Approval Process Definition page, select the step to which the new self-approval user list is assigned and click the Criteria icon.

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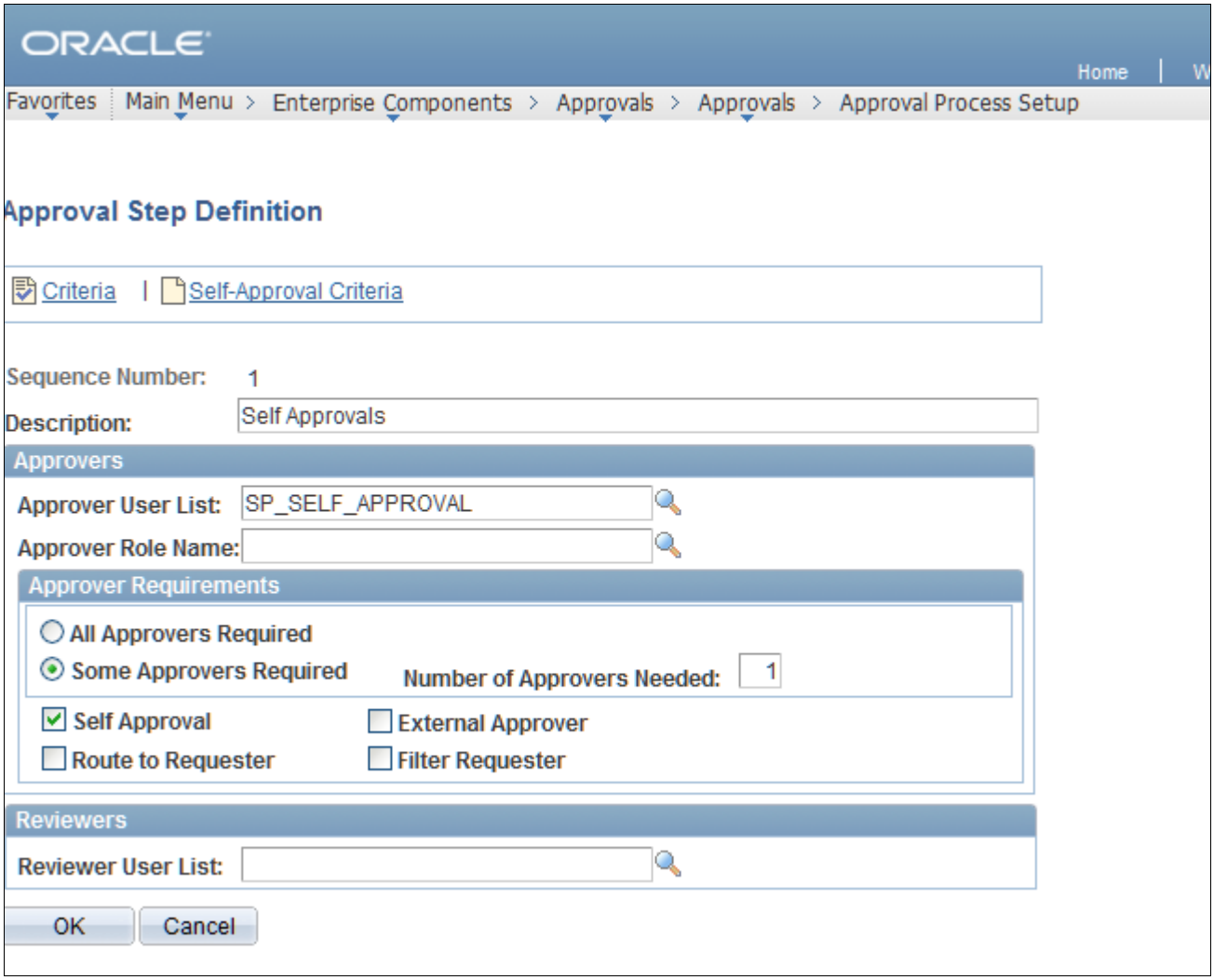
10. On the Approval Step Definition page, ensure that Self Approval is selected and that the Number of Approvers Needed field value is set to *1*.



Approval Step Definition page

11. On the Approval Process Definition page, select the step to which the self-approval user list is assigned and click the Details icon.
12. Click the Self-Approval Criteria icon.

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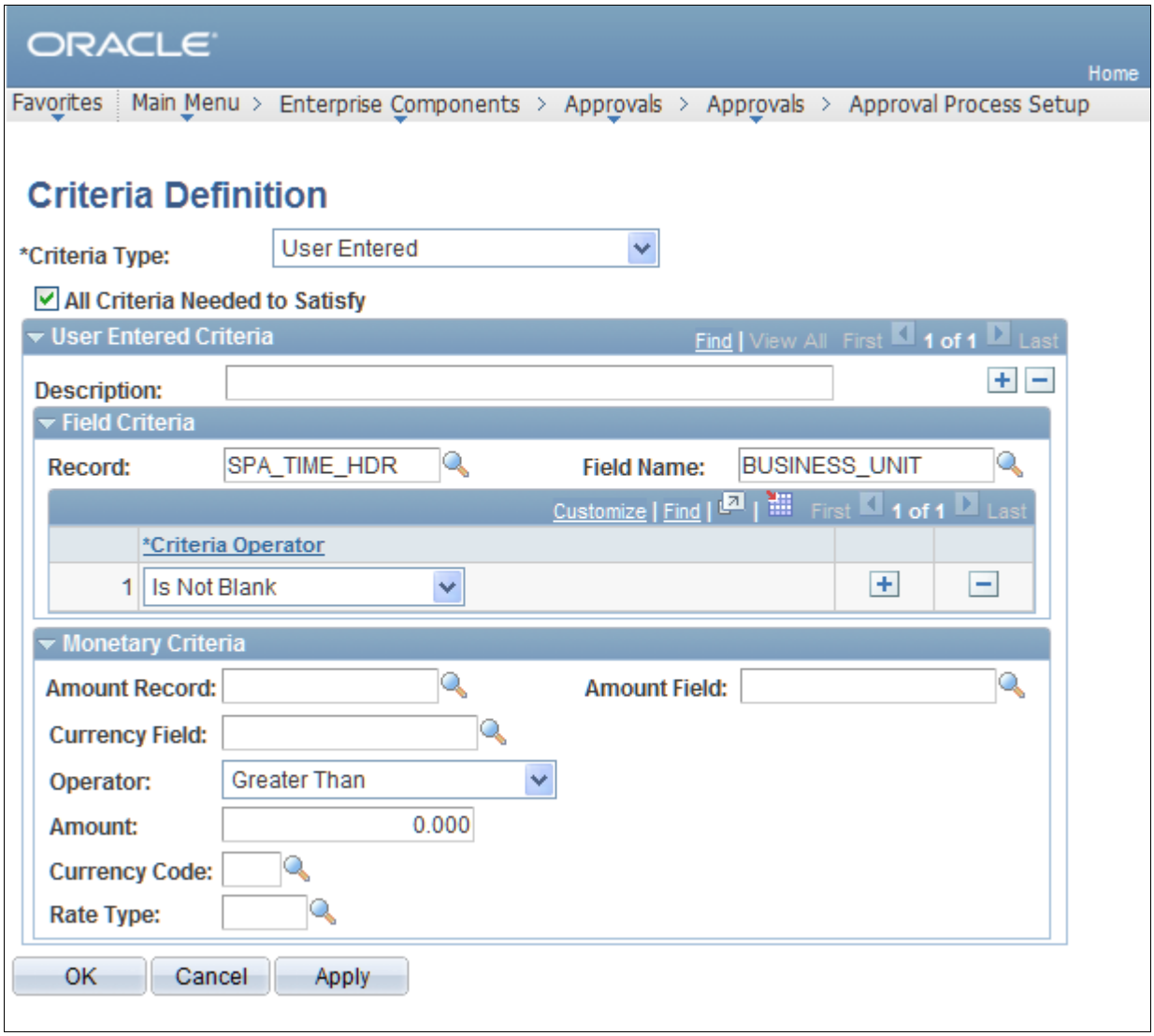
13. On the Criteria Definition page, set up any criteria under Field Criteria or Monetary Criteria, as required



Criteria Definition page

Properties

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

Task 6-23-6: Verifying User Lists for Expenses Approval

In this step you verify user lists for Expenses approval.

1. Select Enterprise Components, Approvals, Approvals, Transaction Configuration.
2. Edit the configuration for process ID SP_EXPENSE.

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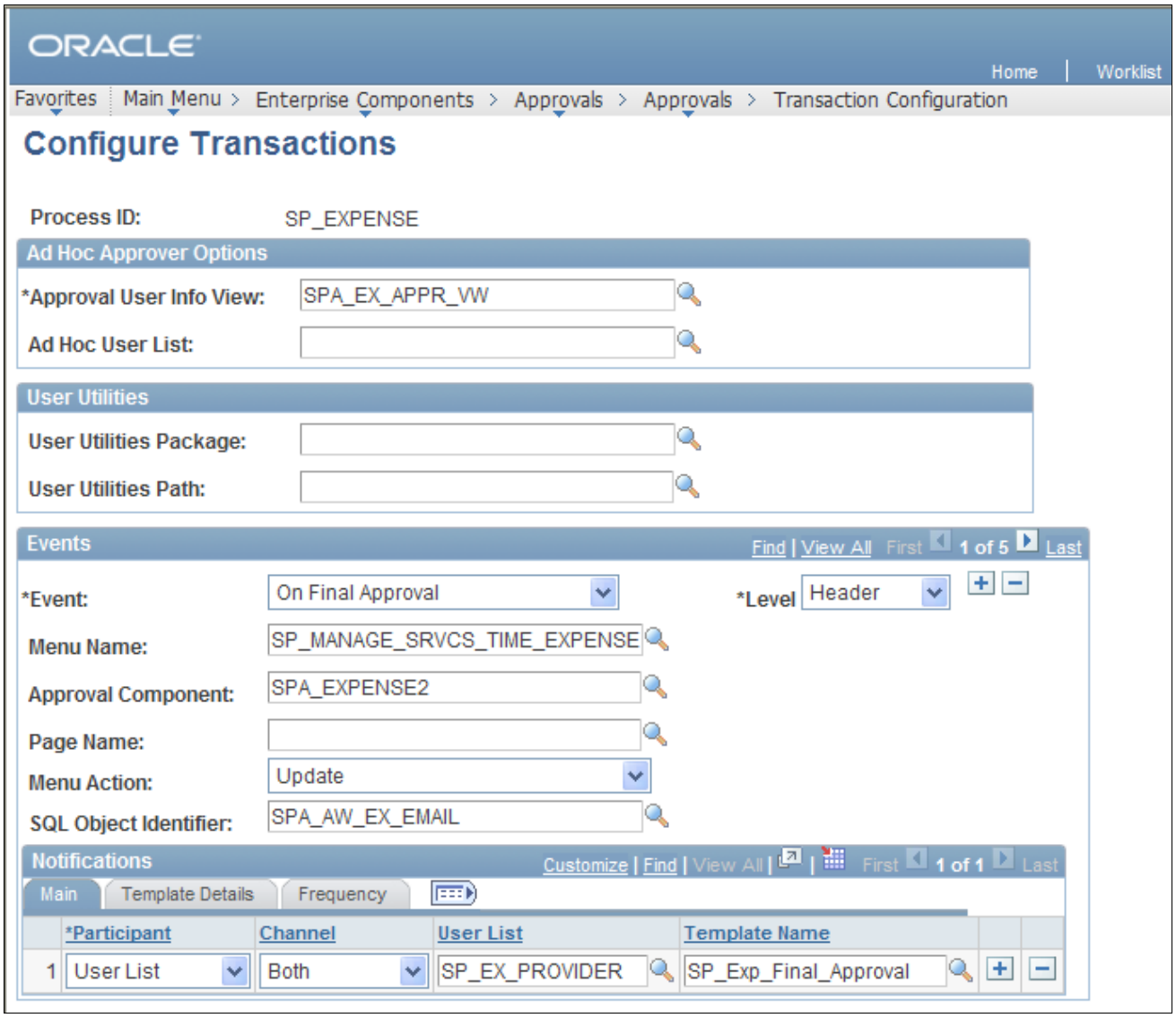
3. Note the names of the user lists in the Notifications section of the Configure Transactions page, as shown.



Configure Transactions page: SP_EXPENSE process

4. Select Enterprise Components, Approvals, Approvals, User List Setup.

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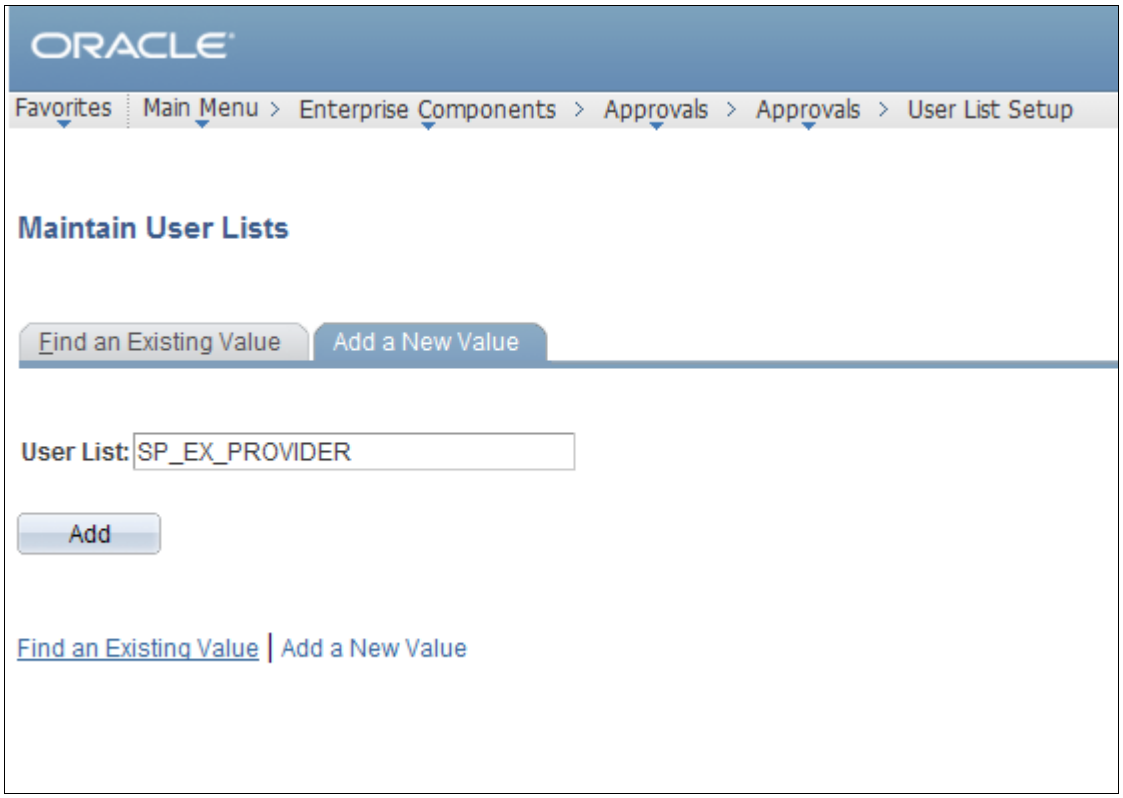
5. On the Maintain User Lists page, make sure that all of the user lists in the configuration for SP_EXPENSE have been defined.

   If not, use the existing user lists in the transaction configuration or add the user lists.



Maintain User Lists page

Properties

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

Task 6-23-7: Defining the Expenses Approval Process

This section discusses:

- Understanding Expenses Approval Process Setup
- Setting Up a User List
- Creating an Expenses Approval Process Definition
- Defining the EMP_SERVLET URL

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Understanding Expenses Approval Process Setup

In this step, you add an Expenses approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ03 to determine the setIDs for which new Expenses approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the applicable steps below if you are updating an existing approval process definition.

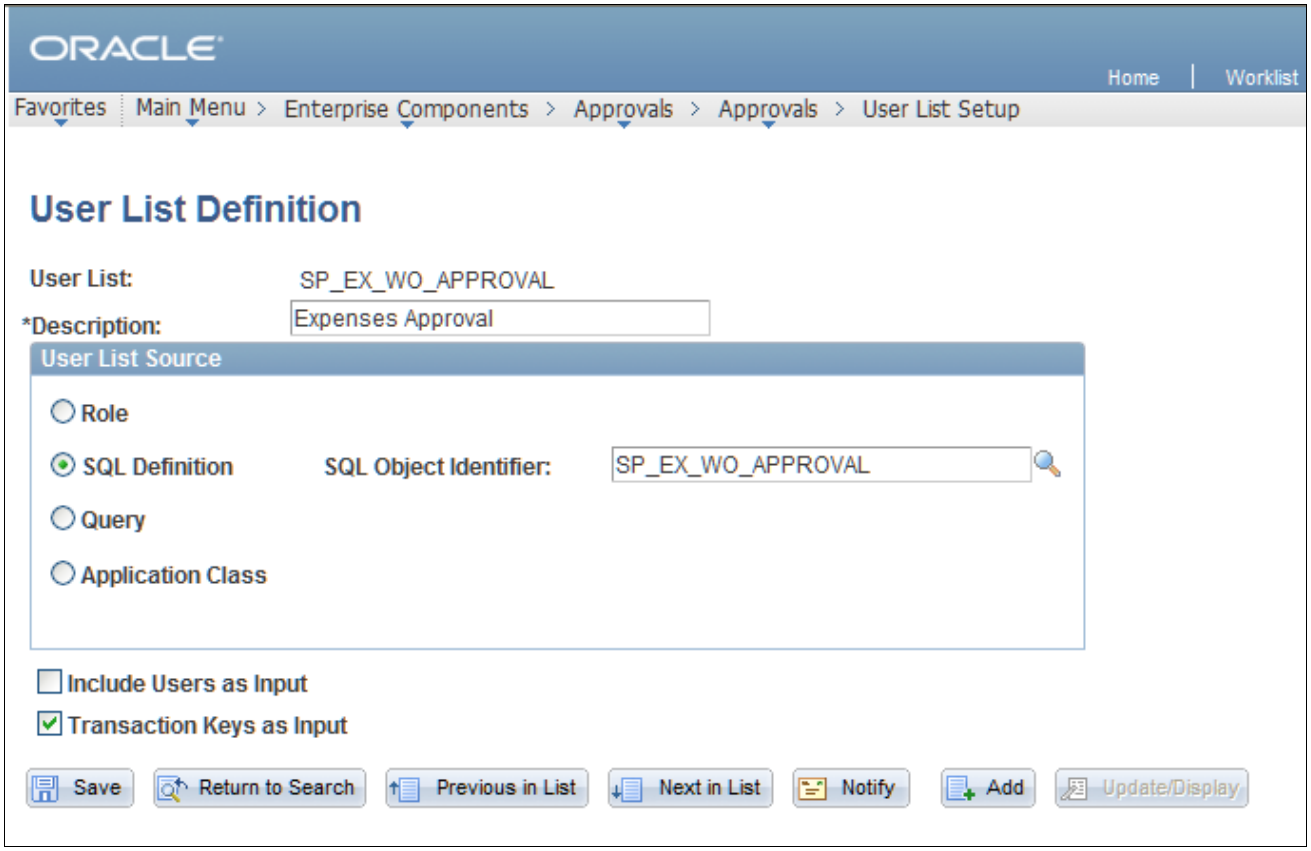
Setting Up a User List

To set up a user list:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

   In the example below, the user list SP_EX_WO_APPROVAL is used for the expense sheet approval process definition.



User List Definition page

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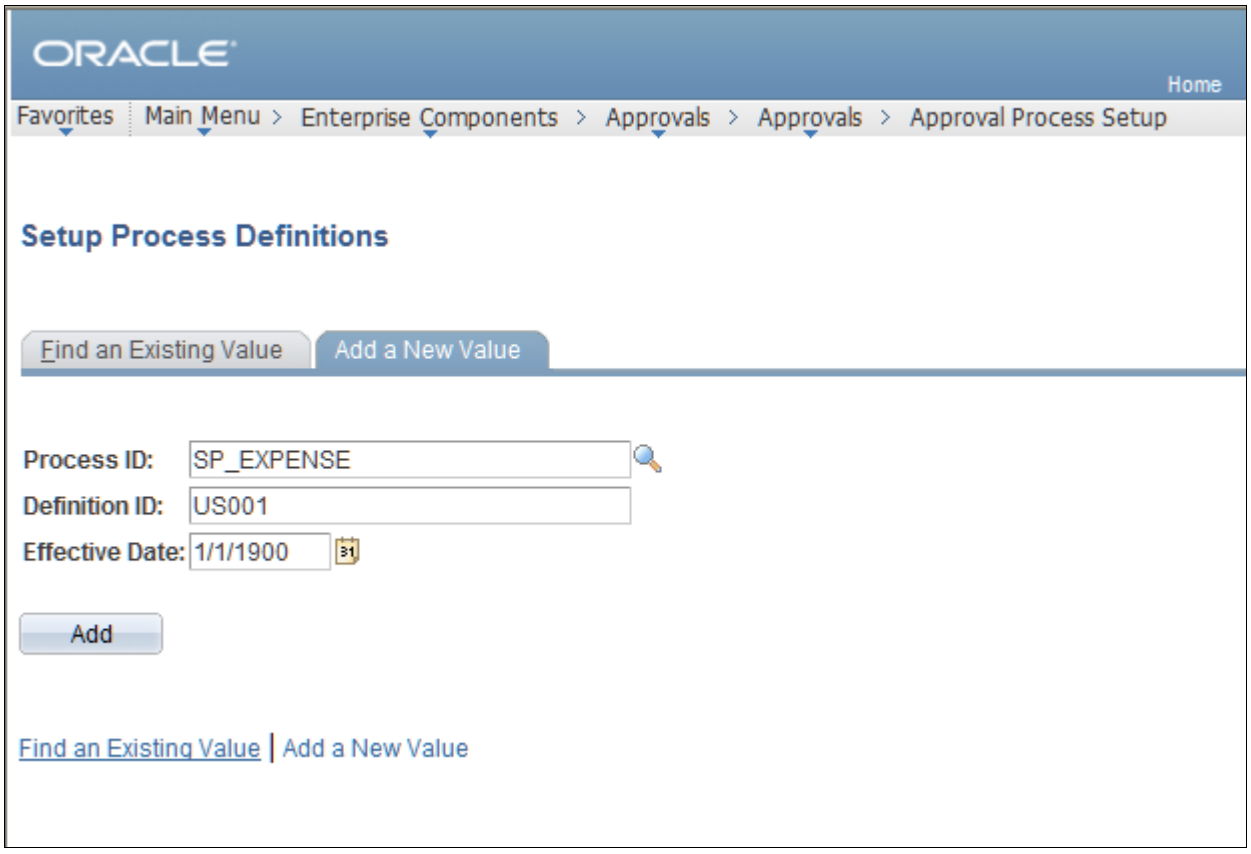
Creating an Expenses Approval Process Definition

You will need to create an approval process definition for each definition ID. Refer to the results from query UPG_SPZ03 for the list of definition IDs for which you should create a process definition.

To create an approval process definition:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_EXPENSE*.
4. In the Definition ID field, enter the setID for which the definition is being created.
5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_EXPENSE*, the definition ID *US001*, and the effective date. Then click Add.



Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definition page, click the Definition Criteria link.

   The Criteria Definition page appears.
7. For the Root Package ID field, select *SCM_APPROVAL_DEFN_CRITERIA*.

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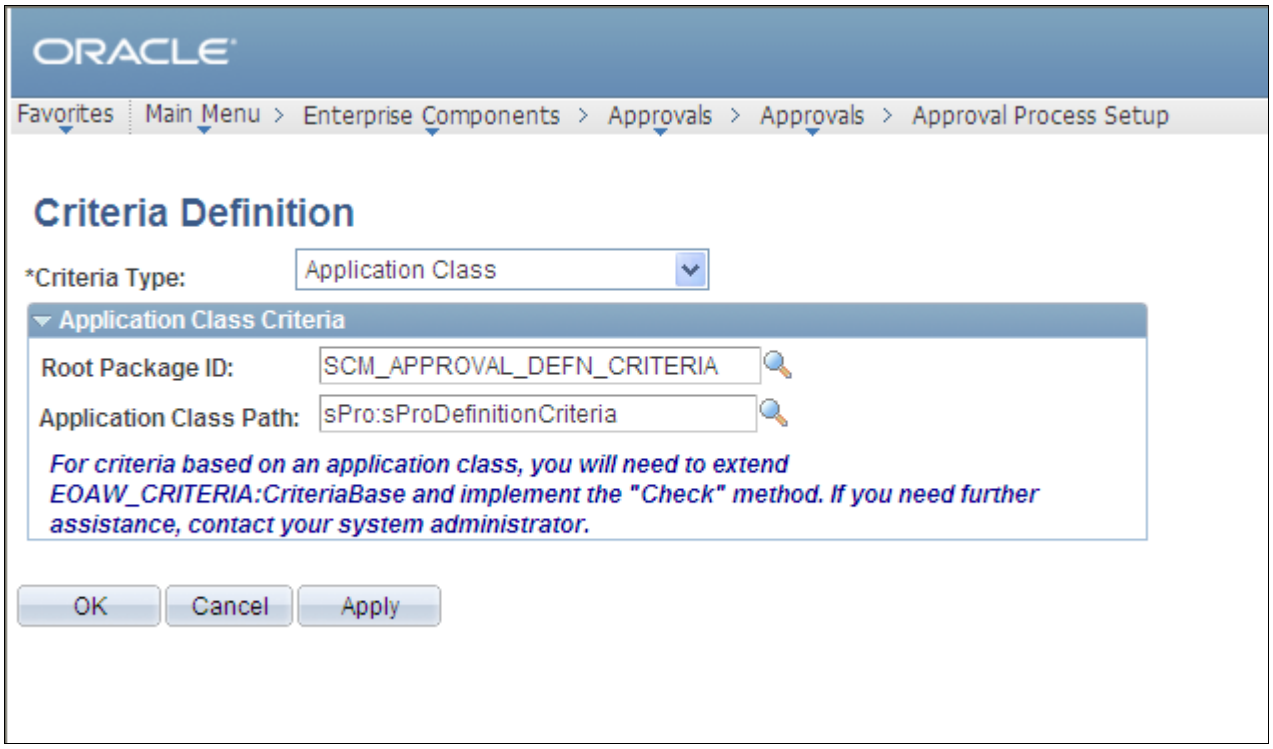
8. For the Application Class Path field, select *sPro:sProDefinitionCriteria.*



Criteria Definition page: Application Class Criteria

9. Click OK.

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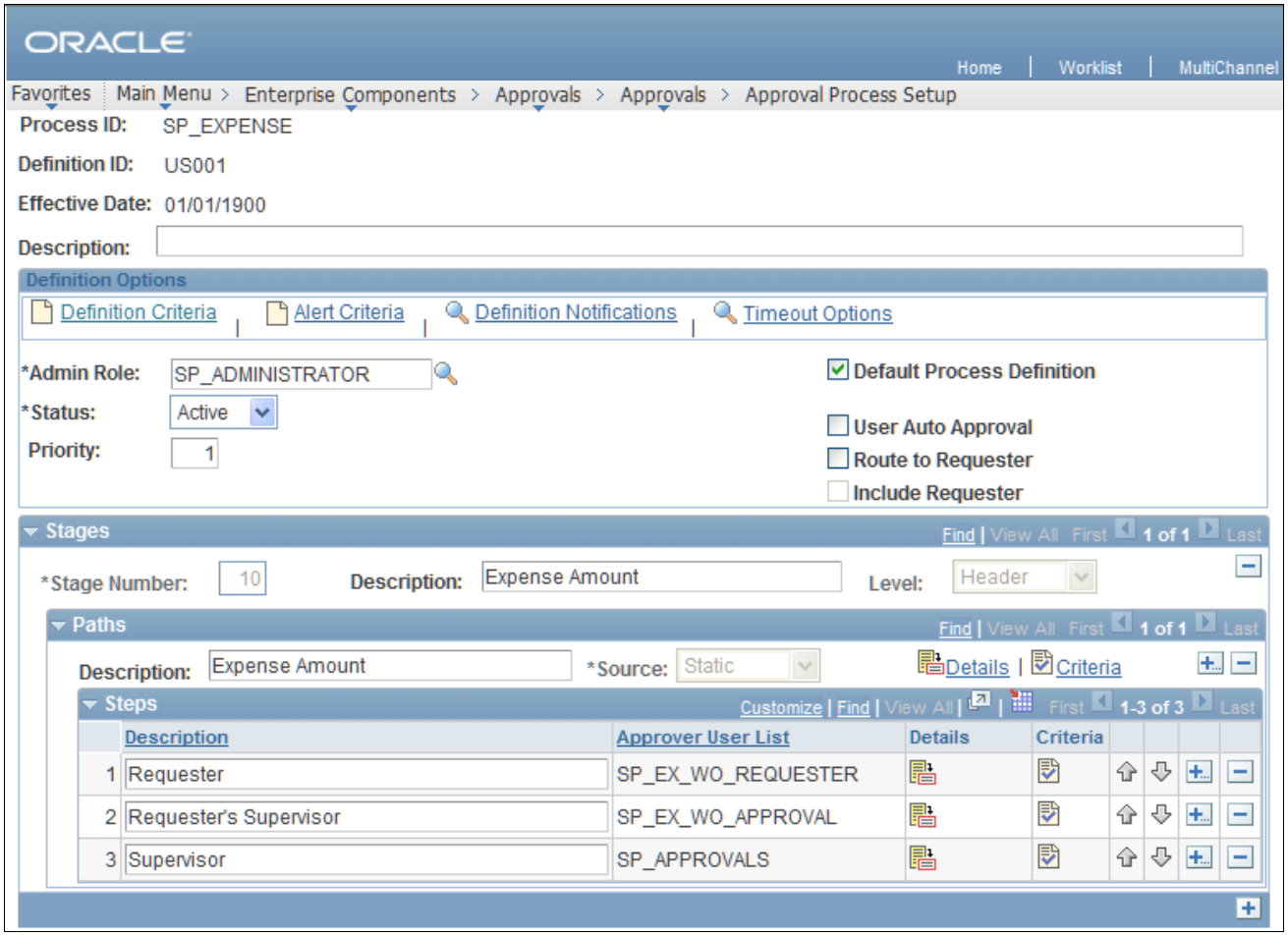
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    For example, this process definition has a Line stage and 3 steps defined.



Setup Process Definitions page: Stages and Paths

11. For each stage, enter a description and select a level of *Header* or *Line.*
12. For each path, enter a description and select the source as *Static* or *Dynamic.*
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.

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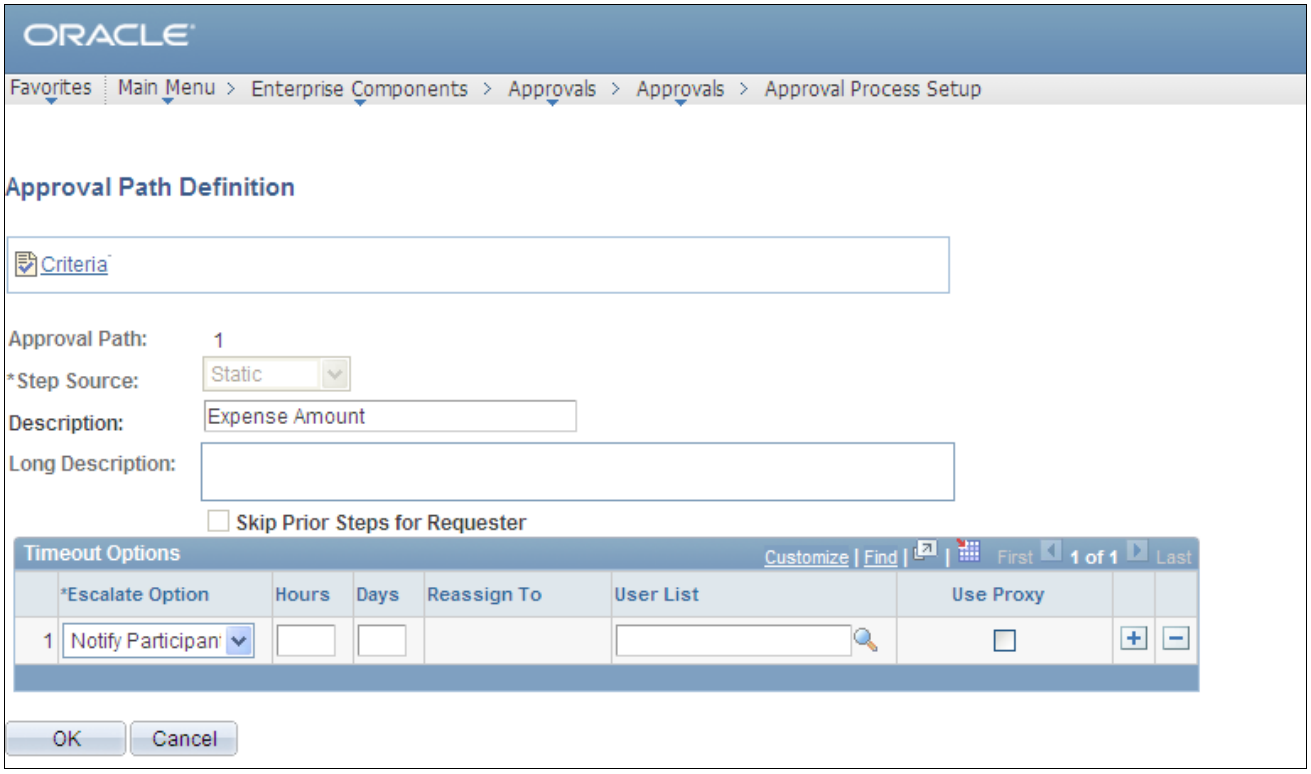
14. Click the Details icon for each path and set up the path details on the Approval Path Definition page, as required.



Approval Path Definition page

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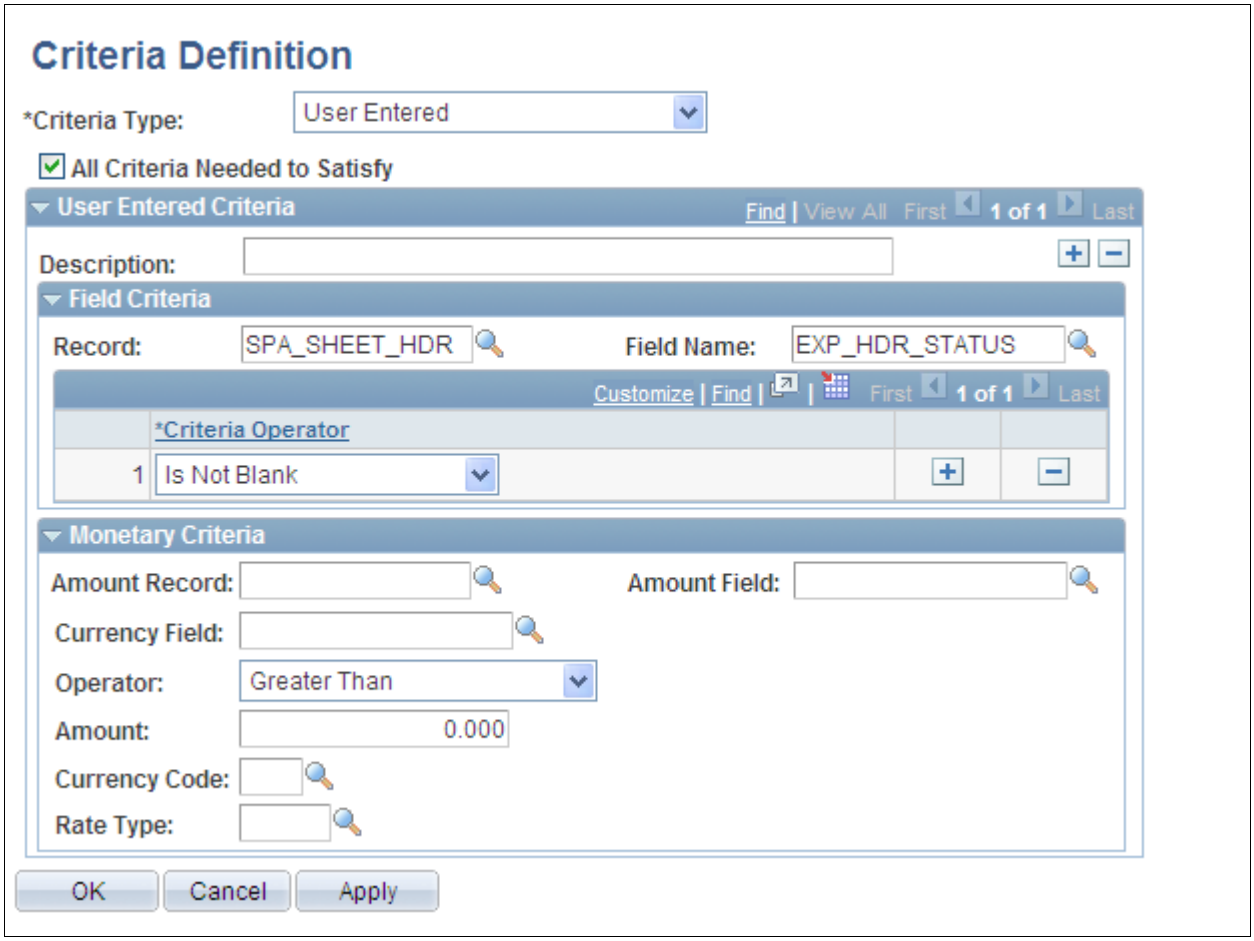
15. Click the Criteria icon for each path and set up the path criteria on the Criteria Definition page, as required.

    For example, this path criteria definition has the field criteria defined with the record set to *SPA_SHEET_HDR*, the field name set to *EXP_HDR_STATUS*, and the criteria operator set to *Is Not Blank*.



Criteria Definition page: Field Criteria

16. Click the Details icon for each step and set up step details, as required.

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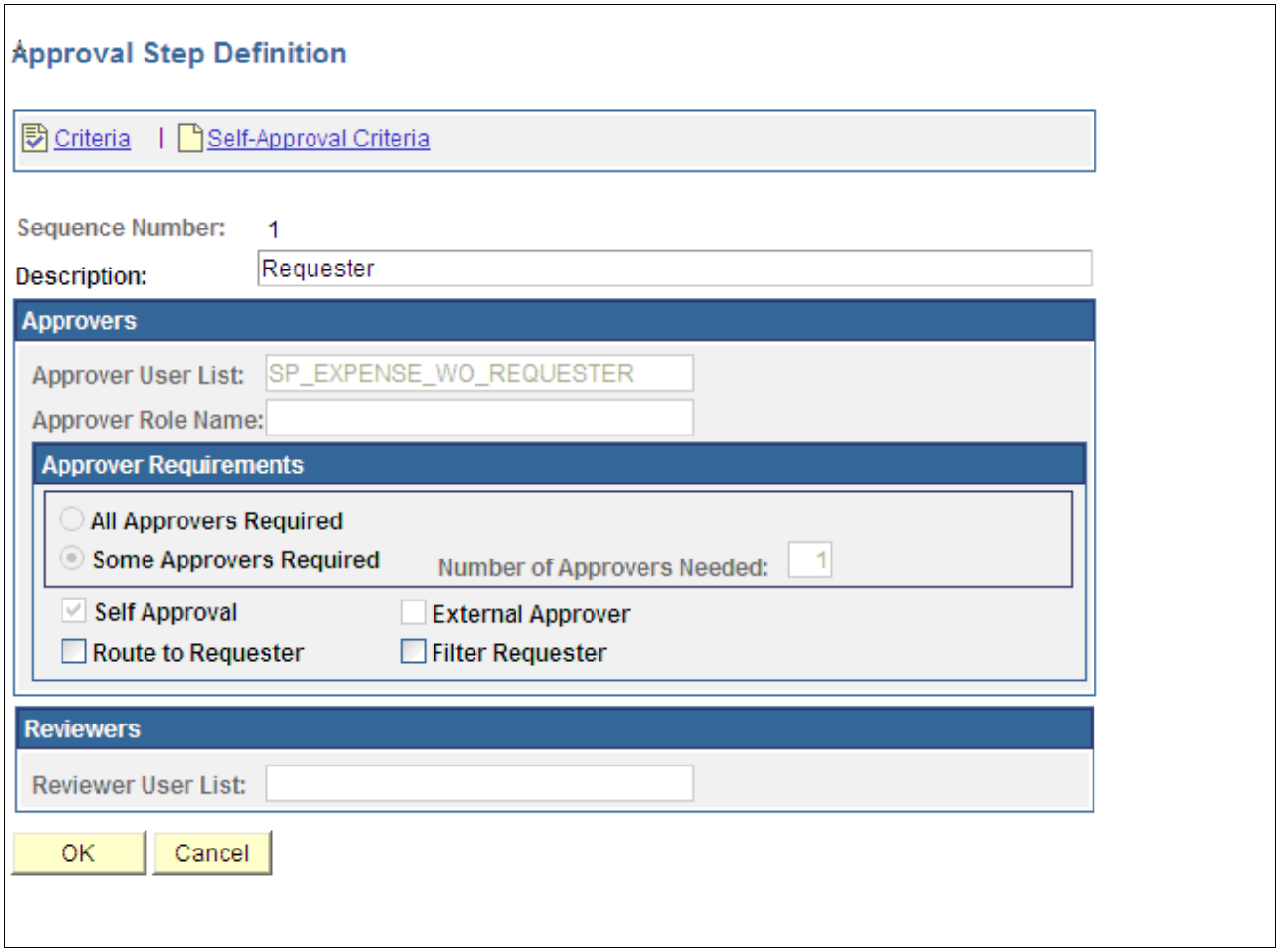
17. Click the Self-Approval Criteria link to set up self-approval criteria.

    You can define field criteria or monetary criteria.



Approval Step Definition page

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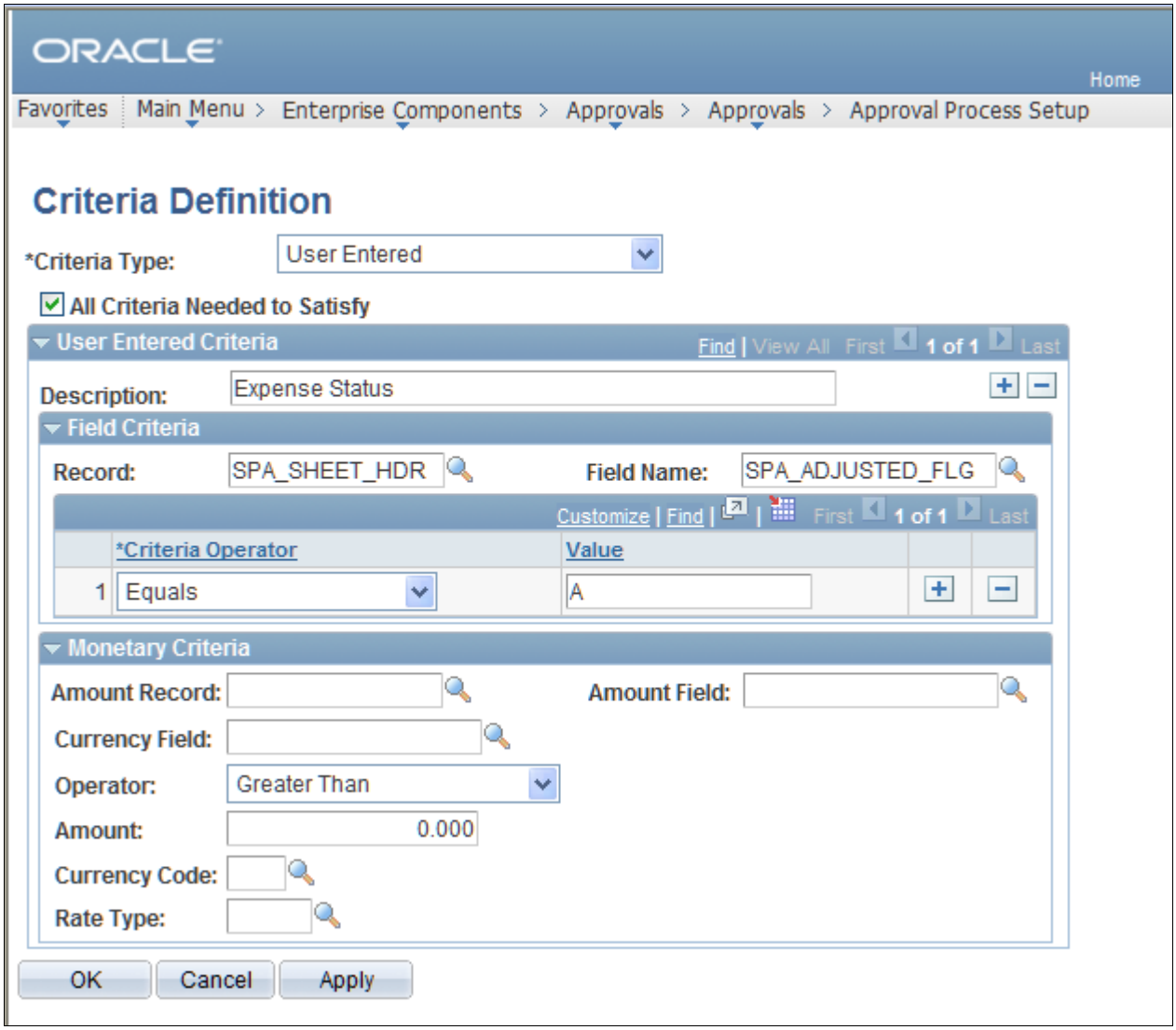
18. Click the Criteria icon for each step and set up step criteria on the Criteria Definition page, as required.

    You can define field criteria or monetary criteria.

    In this example, for approvals after adjustments to work, the following field criteria should be set up. Set the record to *SPA_SHEET_HDR*, the field name to *SPA_ADJUSTED_FLG*, the criteria operator to *Equals*, and the value to *A*.



Criteria Definition: Expense Status

19. Repeat steps 1 through 18 for each approval process definition that you need to create.

Defining the EMP_SERVLET URL

To define the EMP_SERVLET URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.

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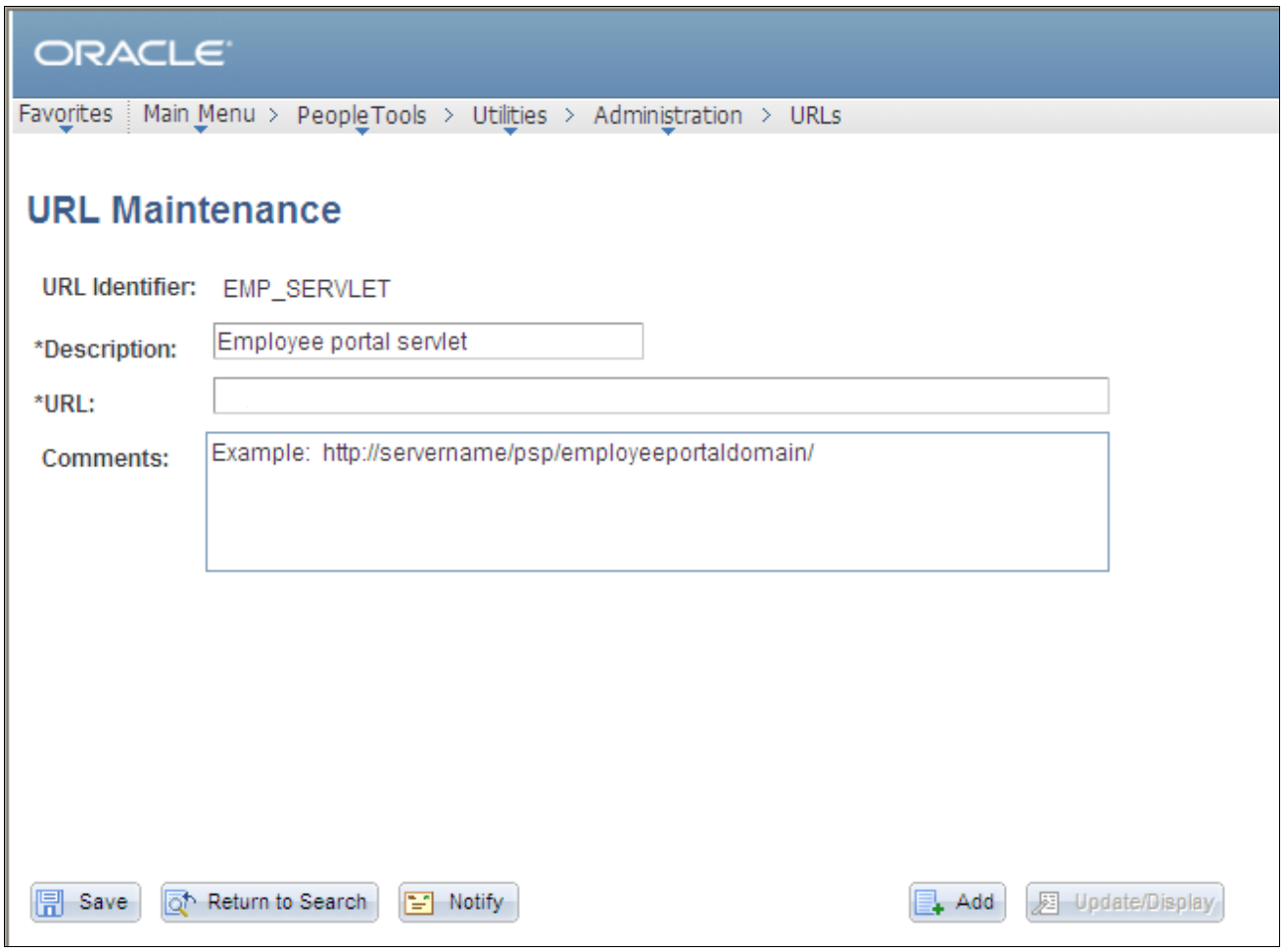
3. To define the EMP_SERVLET URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.

Properties

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

Task 6-23-8: Verifying User Lists for Progress Log Approval

In this task you will verify user lists for progress log approval.

1. Select Enterprise Components, Approvals, Approvals, Transaction Configuration.
2. Edit the configuration for process ID SP_PLOG.

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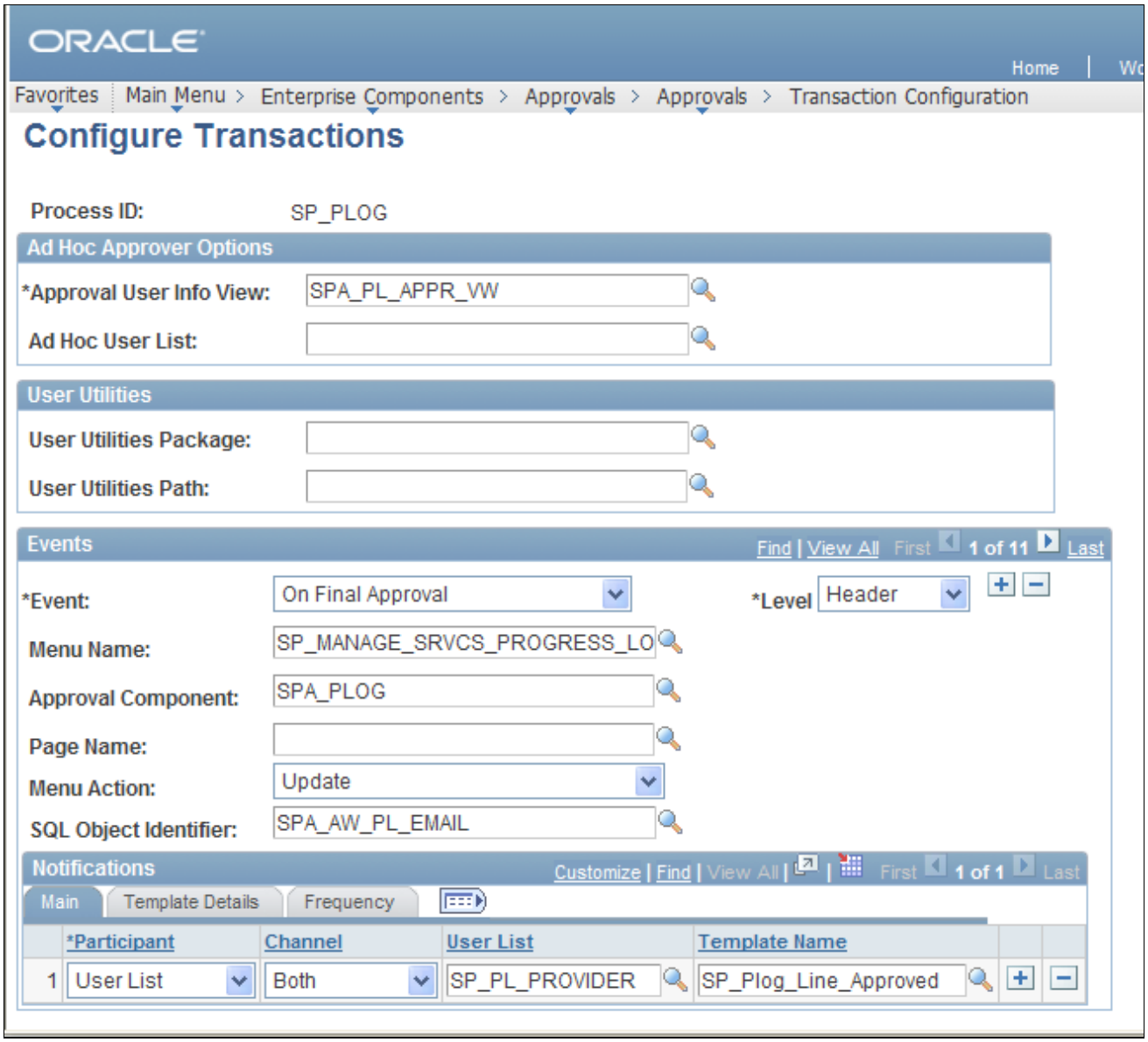
3. Note the names of the user lists in the Notifications section of the Configure Transactions page.



Configure Transactions page: SP_PLOG process

4. Select Enterprise Components, Approvals, Approvals, User List Setup.

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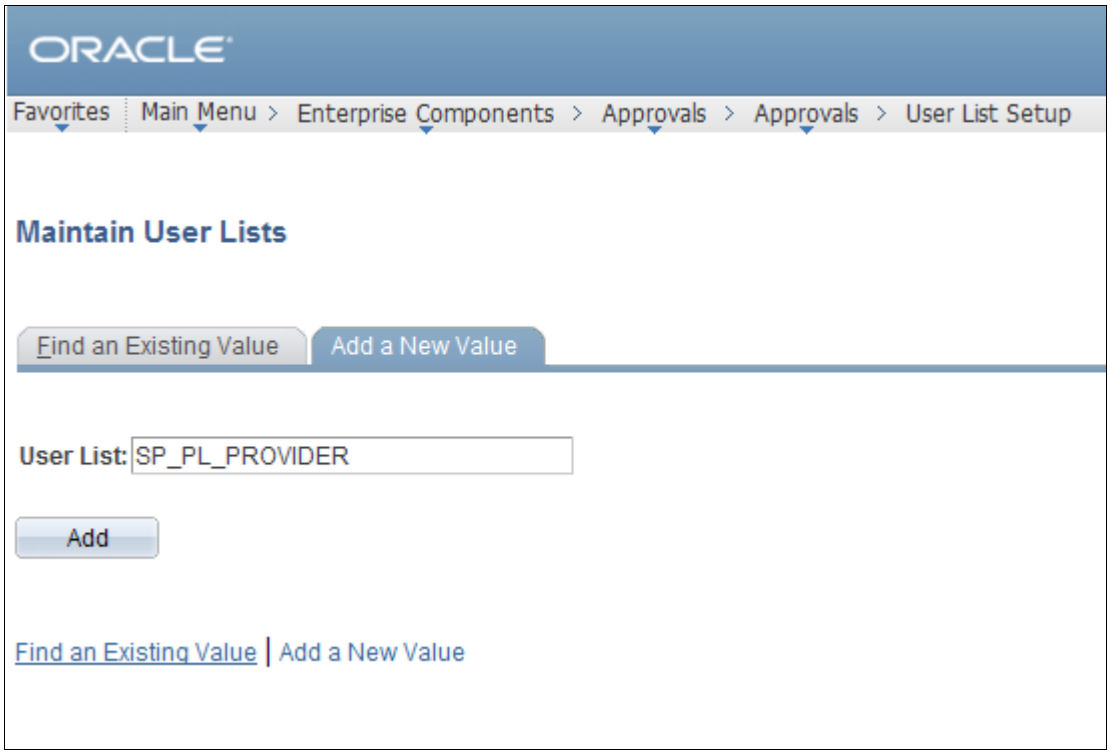
5. On the Maintain User Lists page, make sure that all of the user lists used in the configuration for SPA_PLOG have been defined.

   If not, use the existing user lists in the transaction configuration or add the user lists.



Maintain User LIsts page: SP_PL_PROVIDER

Properties

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

Task 6-23-9: Defining the Progress Log Approval Process

This section discusses:

- Understanding Progress Log Approval Process Setup
- Setting Up a User List
- Creating a Progress Log Approval Process Definition
- Defining the EMP_SERVLET URL

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Understanding Progress Log Approval Process Setup

In this step, you add a progress log approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ02 to determine the setIDs for which new progress log approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the appropriate steps below if you are updating an existing approval process definition.

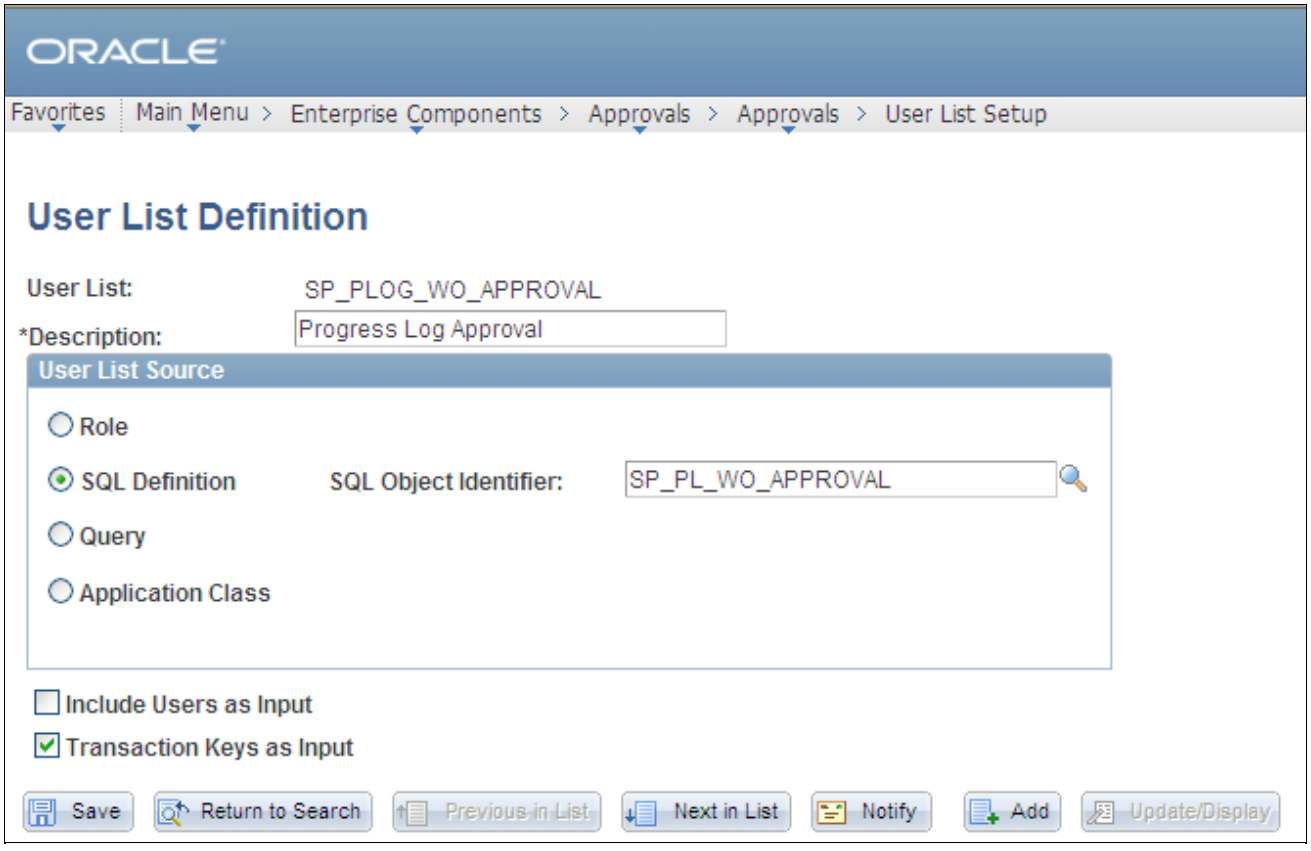
Setting Up a User List

To set up a user list:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

   In the example below, the user list SP_PLOG_WO_APPROVAL is used for the progress log approval process definition.



User List Definition page

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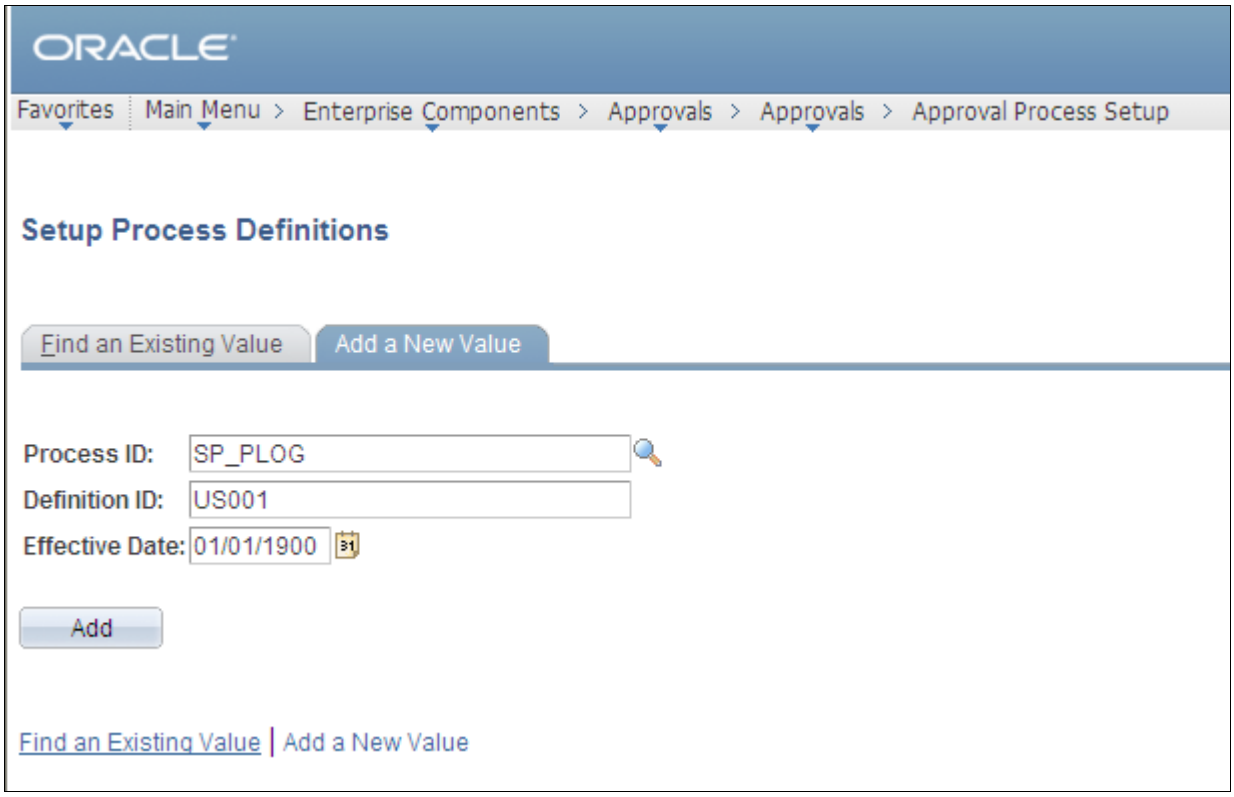
Creating a Progress Log Approval Process Definition

You will need to create an approval process definition for each definition ID. Refer to the results from query UPG_SPZ02 for the list of definition IDs for which you should create a process definition.

To create an approval process definition:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_PLOG*.
4. In the Definition ID field, enter the setID for which the definition is being created.
5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_PLOG*, the definition ID *US001*, and the effective date. Then click Add.



Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definition page, click the Definition Criteria link.

   The Criteria Definition page appears.
7. For the Root Package ID field, select SCM_APPROVAL_DEFN_CRITERIA.

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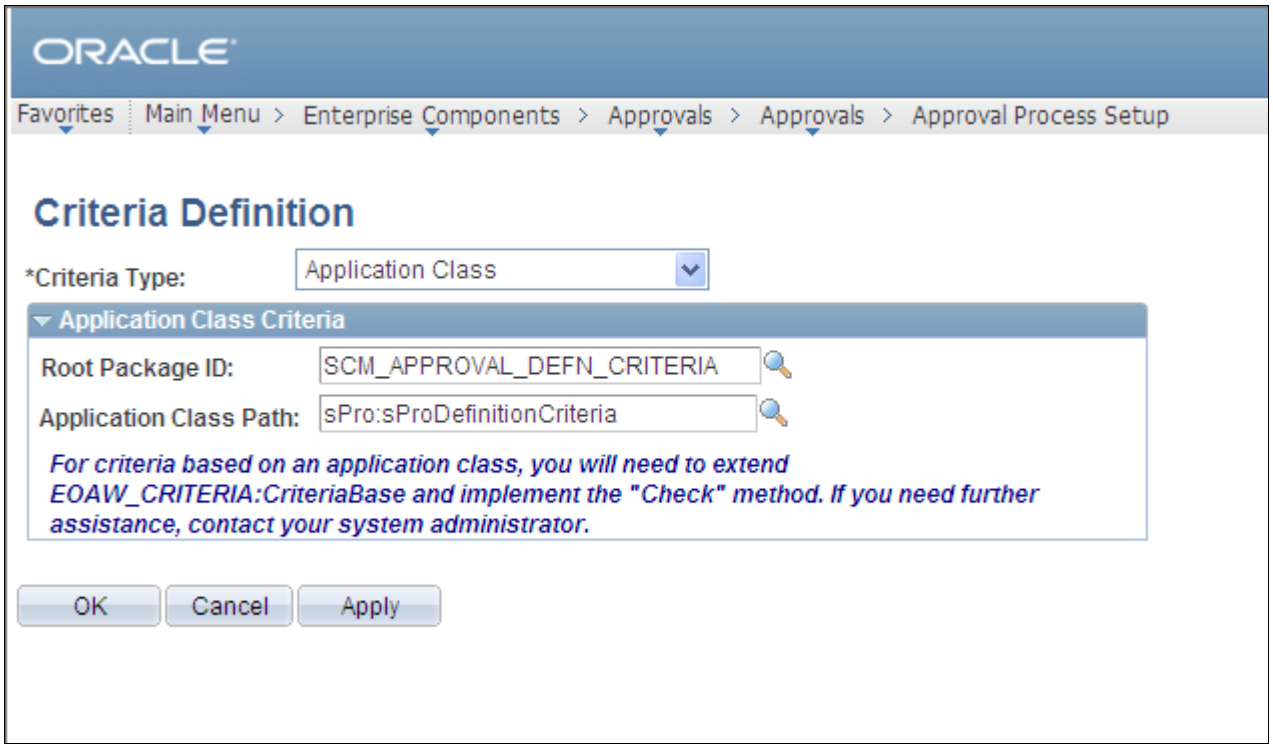
8. For the Application Class Path field, select sPro:sProDefinitionCriteria.



Criteria Definition page: Application Class Criteria

9. Click OK.

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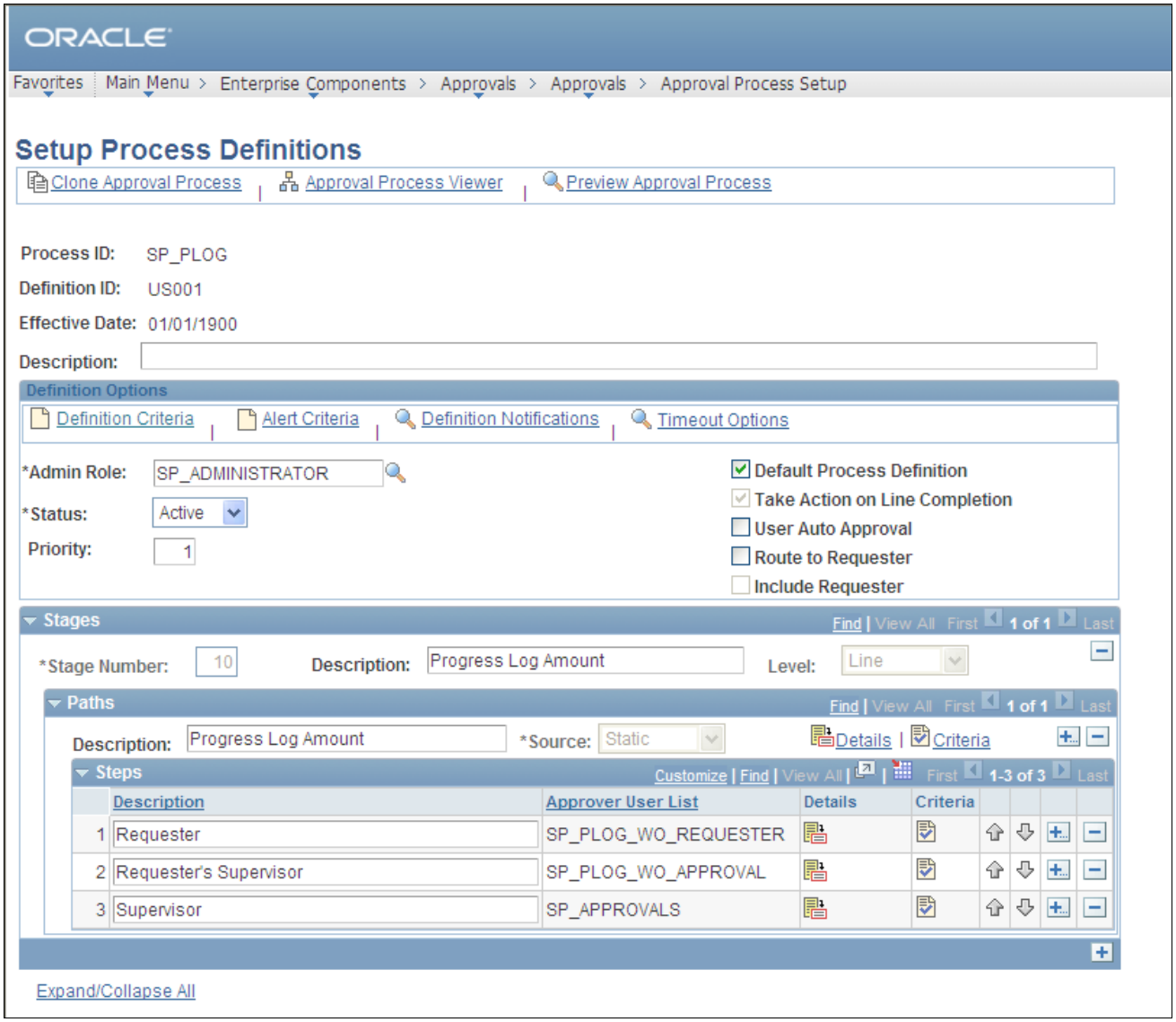
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    For example, this process definition has a Line stage and 3 steps defined.



Setup Process Definitions page: Stages and Paths

11. For each stage, enter a description and select a level of *Header* or *Line*.
12. For each path, enter a description and select the source as *Static* or *Dynamic*.
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.

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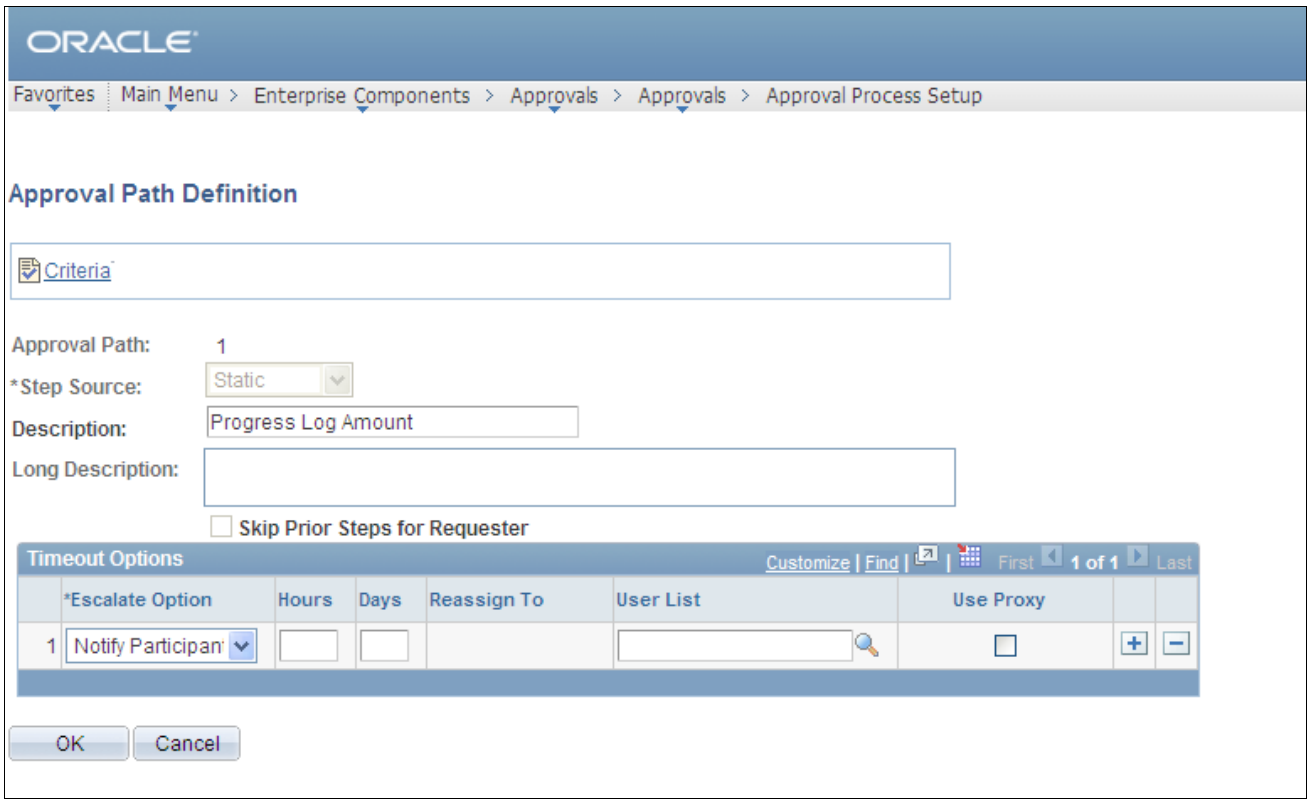
14. Click the Details icon for each path and set up the path details on the Approval Path Definition page, as required.



Approval Path Definition page

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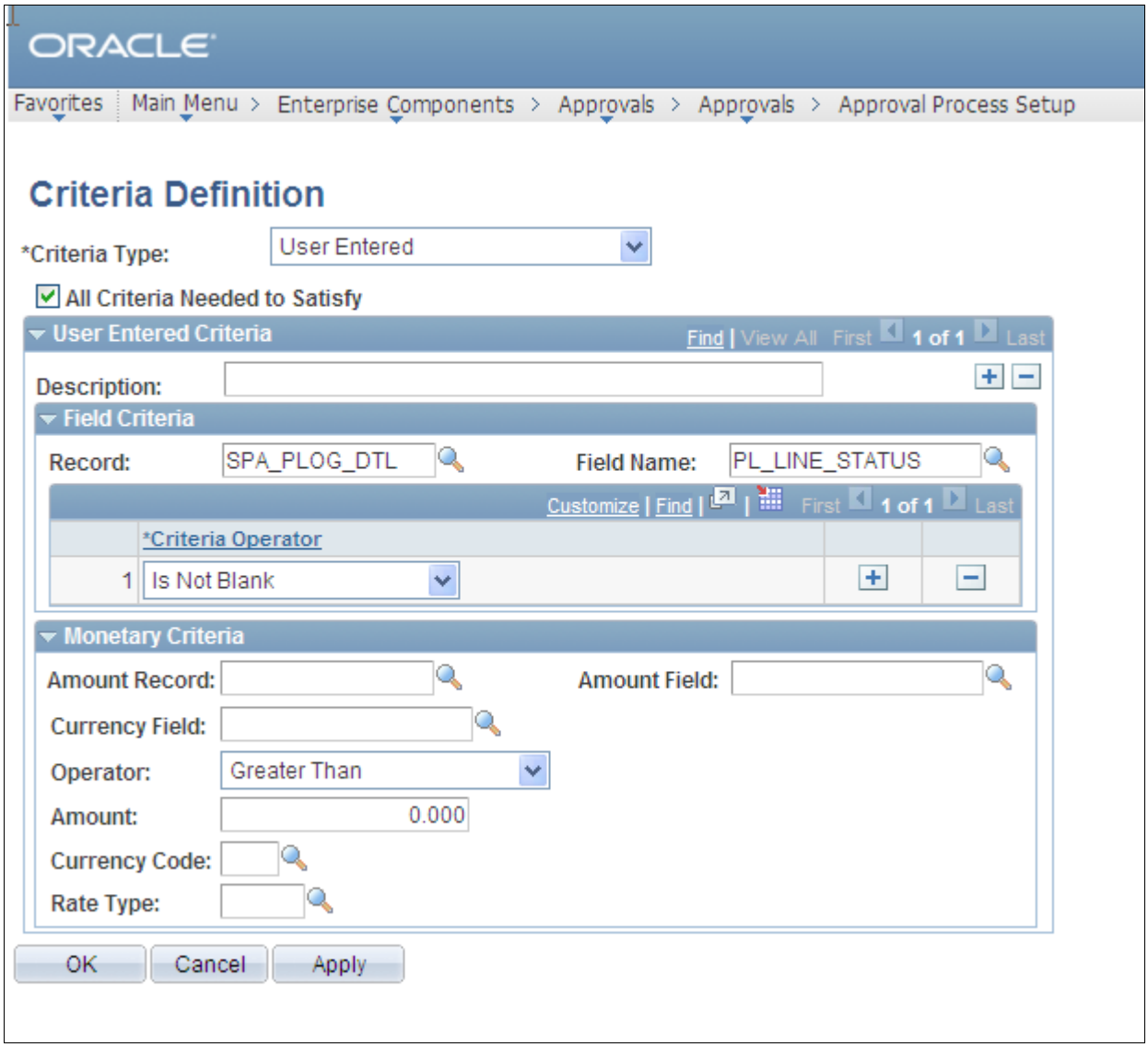
15. Click the Criteria icon for each path and set up the path criteria on the Criteria Definition page, as required.

    For example, this path criteria definition has the field criteria defined with the record set to *SPA_PLOG_DTL*, the field name set to *PL_LINE_STATUS*, and the criteria operator set to *Is Not Blank*.



Criteria Definition page: Field Criteria

16. Click the Details icon for each step and set up the step details, as required.

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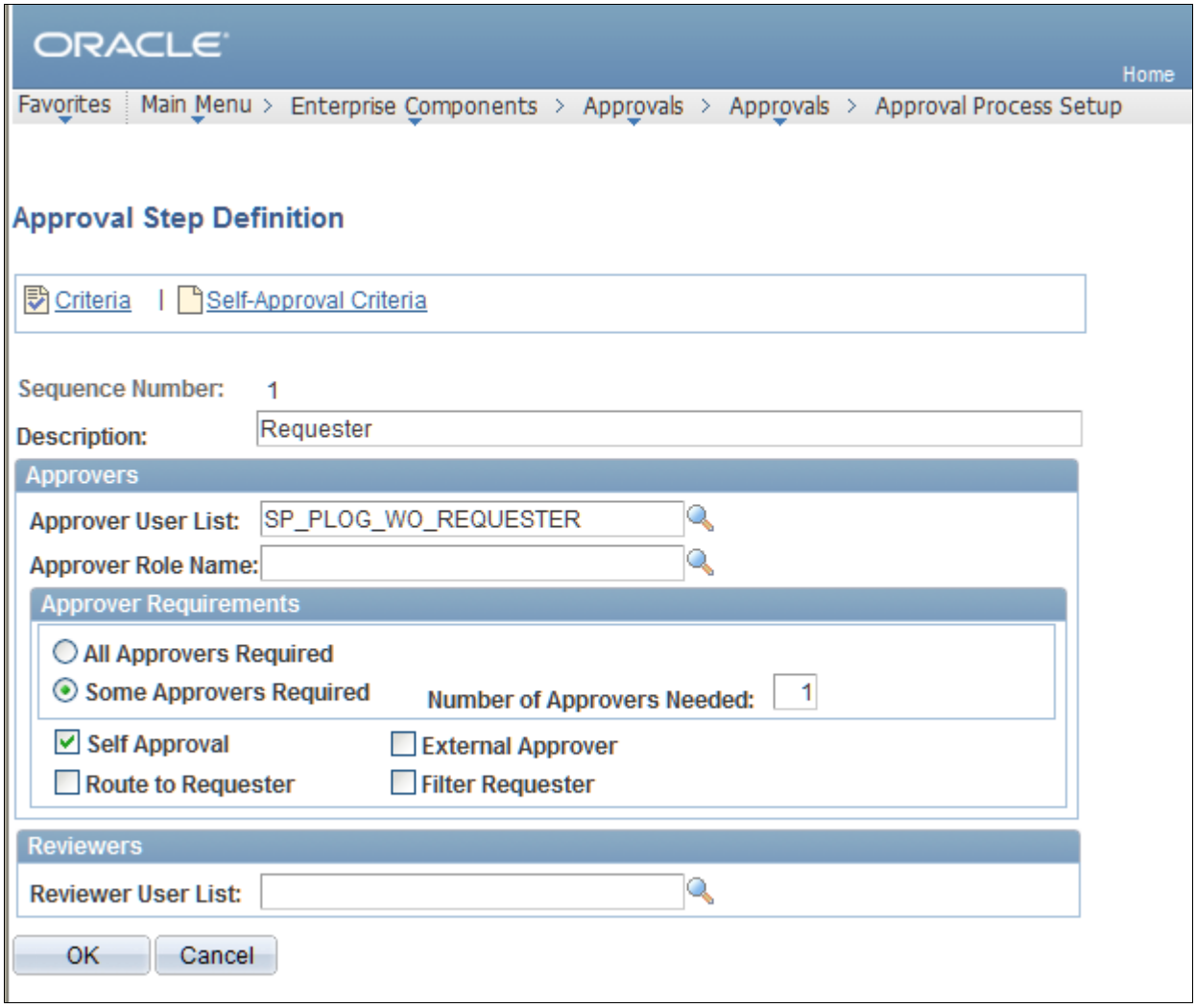
17. Click the Self-Approval Criteria link on the Approval Step Definition page to set up self-approval criteria. You can define field criteria or monetary criteria.



Approval Step Definition page

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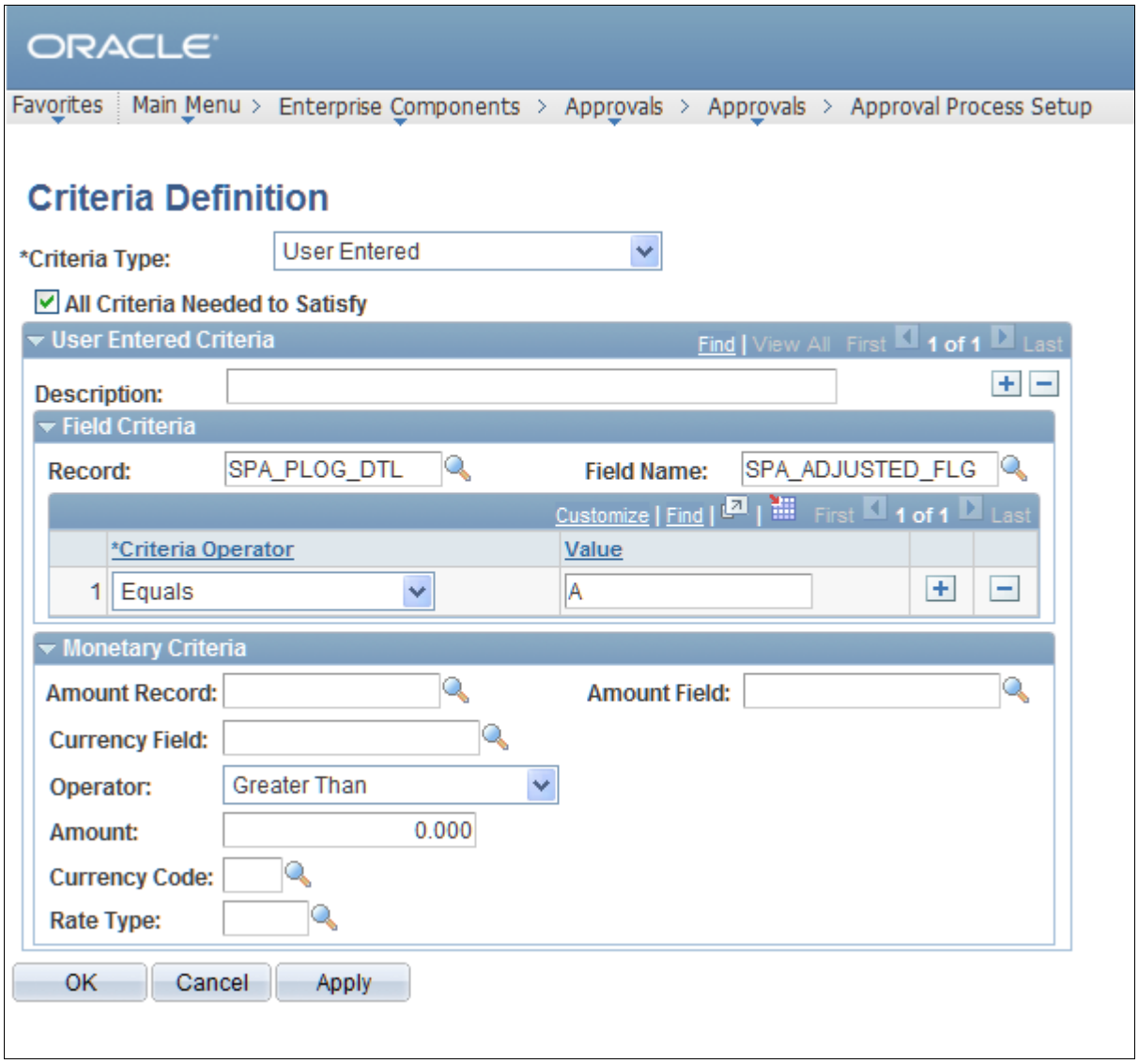
18. Click the Criteria icon for each step and set up the step criteria on the Criteria Definition page, as required.

    You can define field criteria or monetary criteria.

    In this example, for approvals after adjustments to work, the following field criteria should be set up. Set the record to *SPA_PLOG_DTL*, the field name to *SPA_ADJUSTED_FLG*, and the criteria operator to *Equals*.



Criteria Definition page: Plog Status

19. Repeat steps 1 through 18 for each approval process definition that you need to set up.

Defining the EMP_SERVLET URL

To define the EMP_SERVLET URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.

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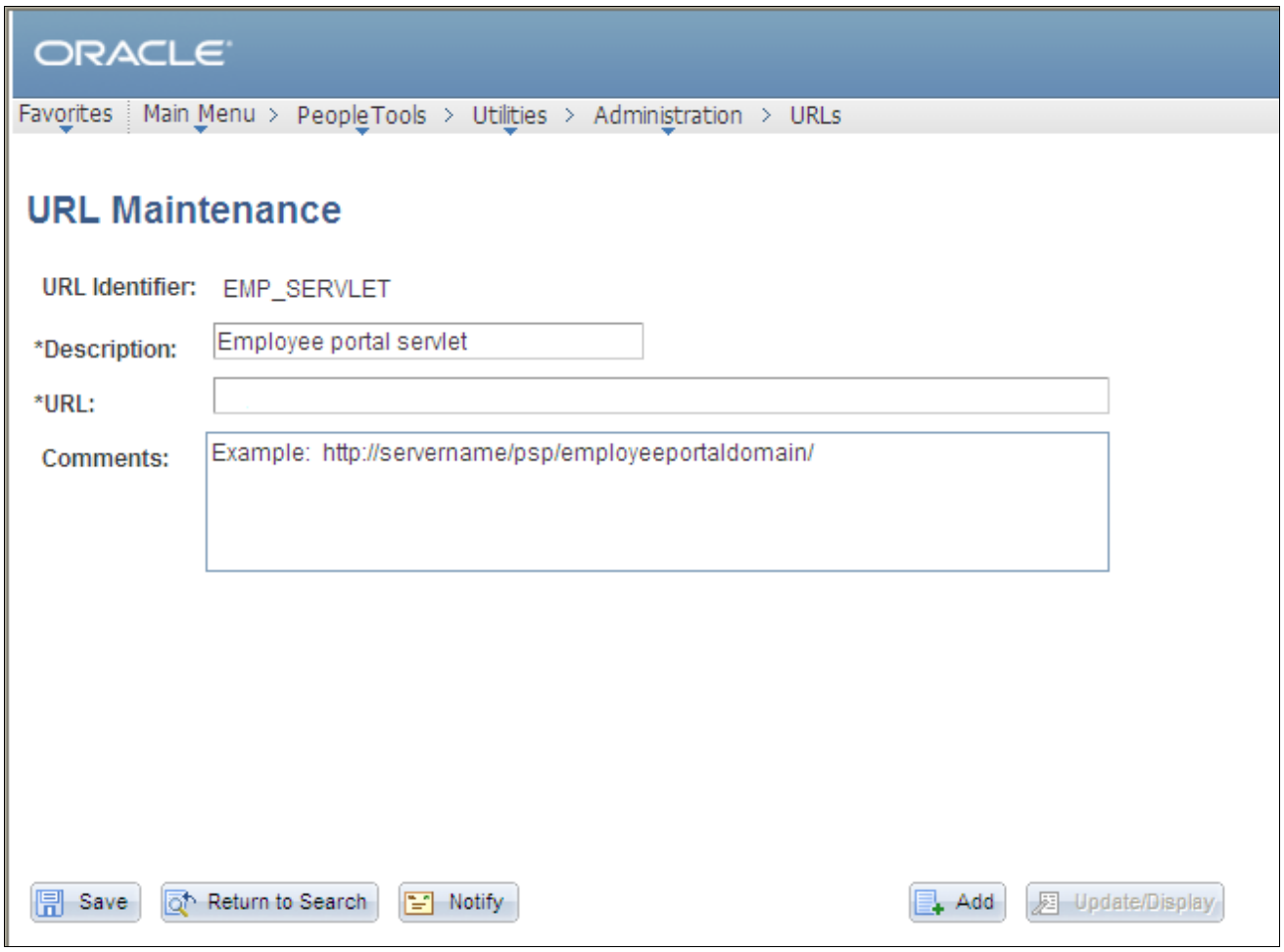
3. To define the EMP_SERVLET URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.

Properties

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

Task 6-23-10: Defining the Invoice Approval Process

This section discusses:

- Understanding Invoice Approval Process Setup
- Setting Up a User List

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- Creating an Invoice Approval Process Definition
- Defining the EMP_SERVLET and SUP_SERVLET URLs

Understanding Invoice Approval Process Setup

In this step, you add an invoice approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ04 to determine the setIDs for which new invoice approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the appropriate steps below if you are updating an existing approval process definition.

Setting Up a User List

To set up a user list:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

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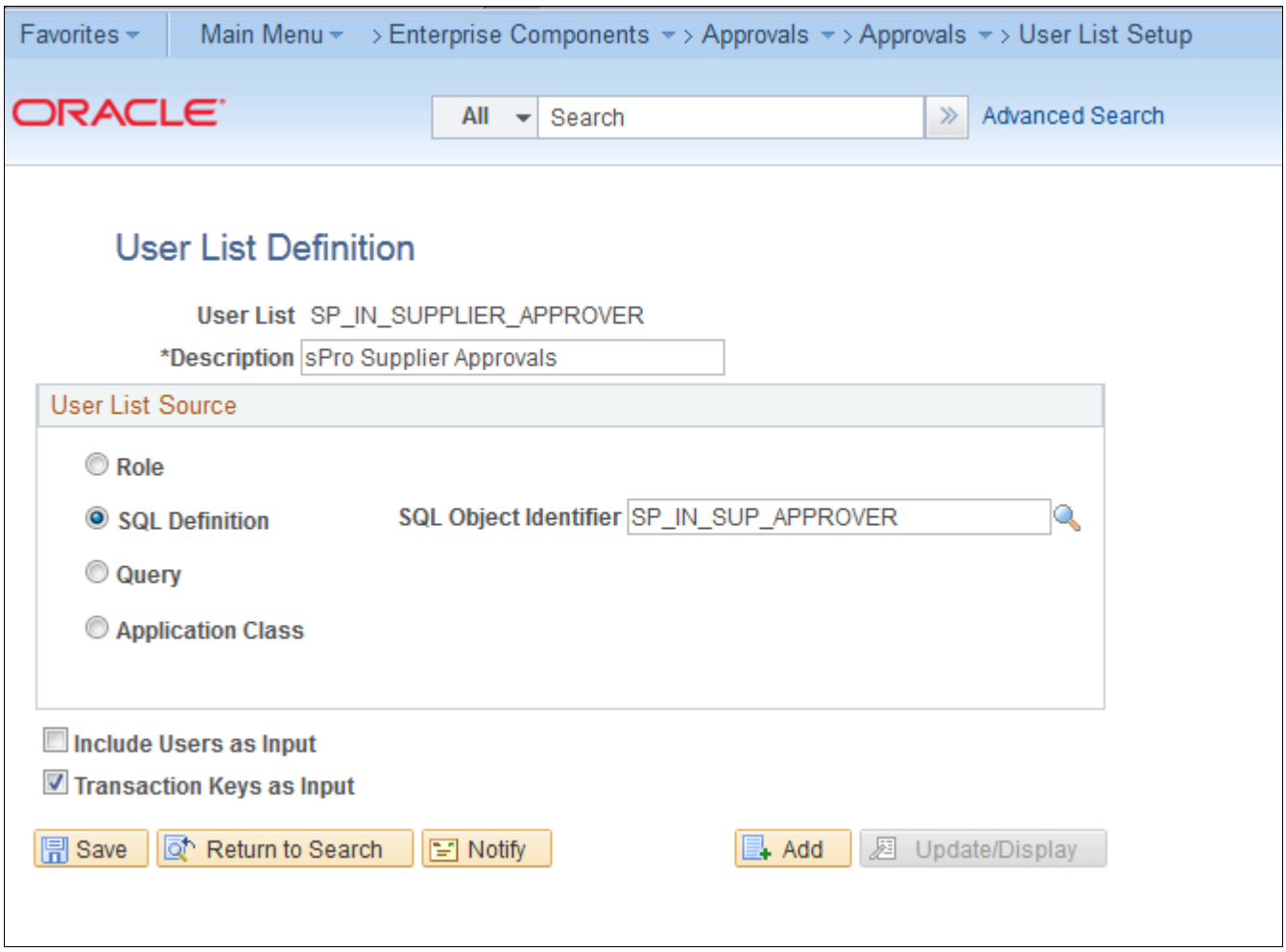
In this example, the user list SP_IN_SUPPLIER_APPROVER is created for supplier invoice approvers.



User List Definition page

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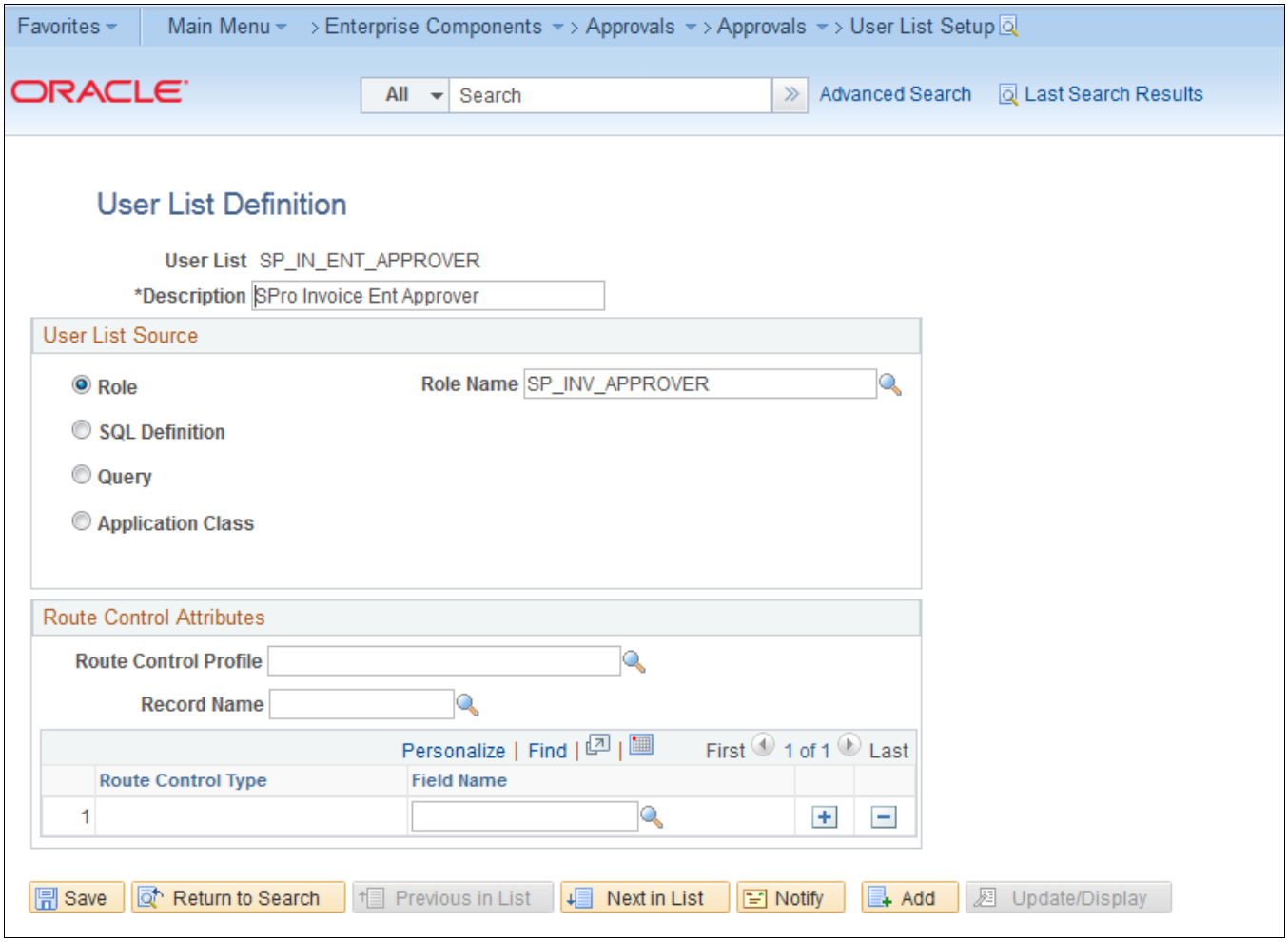
In this example, the user list SP_IN_ENT_APPROVER is created for enterprise invoice approvers.



User List Definition page

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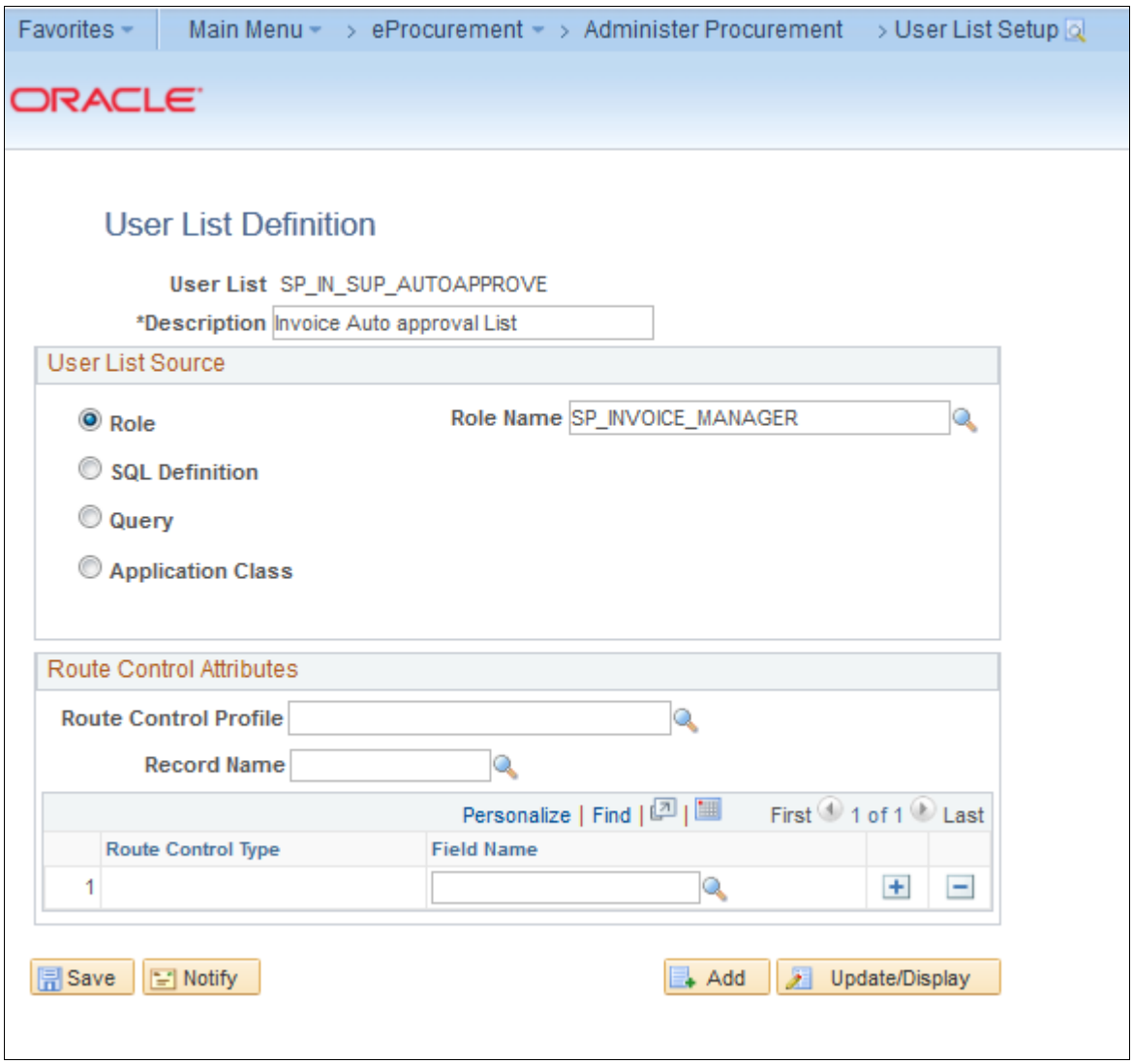
In this example, the user list SP_IN_SUP_AUTOAPPROVE is created for invoice automatic approval.



User List Definition page

Creating an Invoice Approval Process Definition

You will need to create an approval process definition for each definition ID. Refer to the results from query UPG_SPZ04 for the list of definition IDs for which you should create a process definition.

To create an approval process definition:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_INVOICE*.
4. In the Definition ID field, enter the setID for which the definition is being created.

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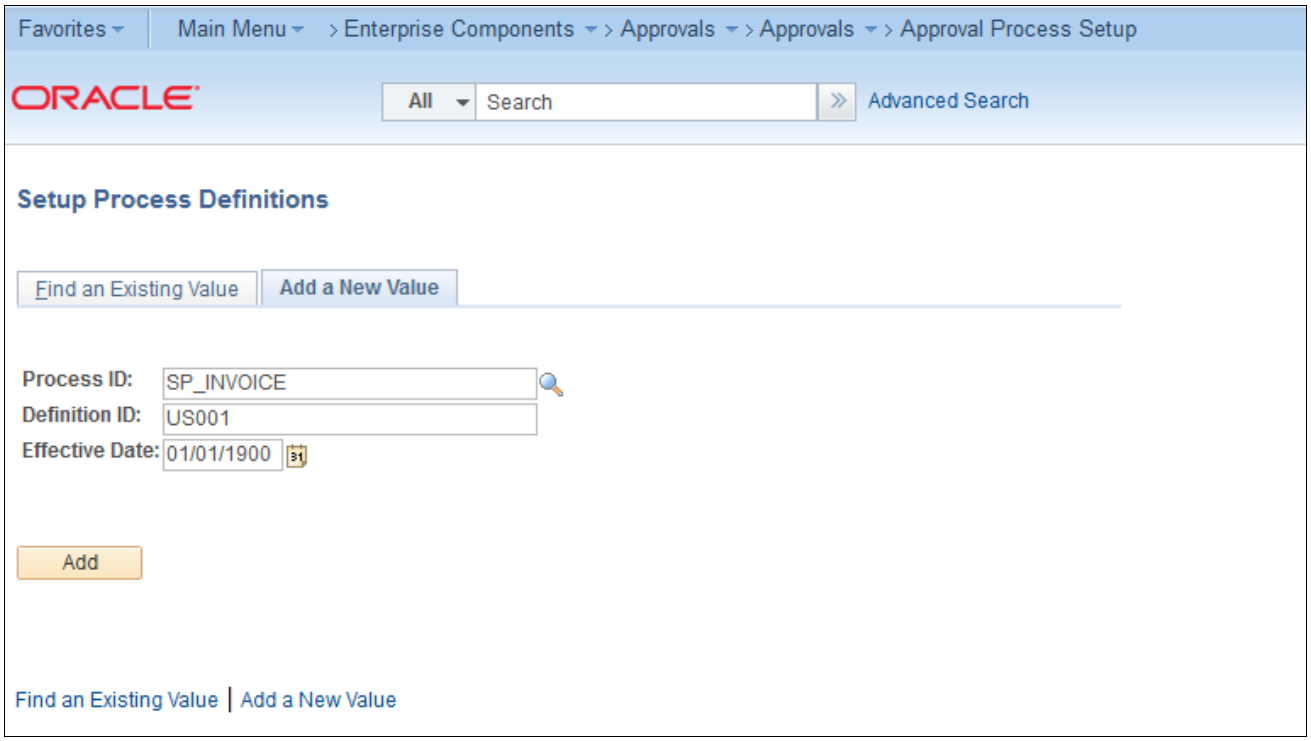
5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_ INVOICE*, the definition ID *US001*, and the effective date. Then click Add.



Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definition page, click the Definition Criteria link.

   The Criteria Definition page appears.

7. For the Root Package ID field, select *SCM_APPROVAL_DEFN_CRITERIA*.

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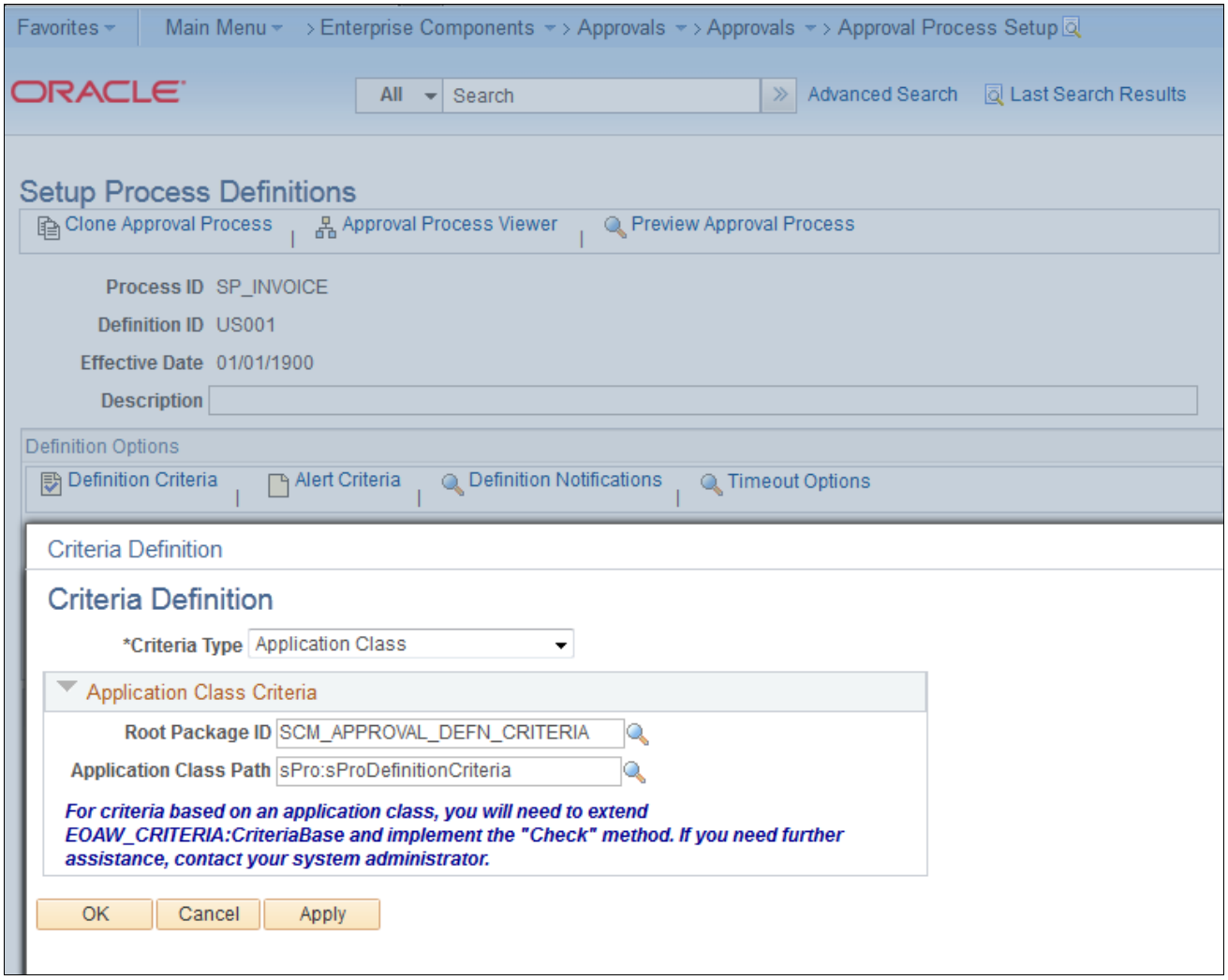
8. For the Application Class Path field, select *sPro:sProDefinitionCriteria.*

   This example shows the Criteria Definition page.



Criteria Definition page

9. Click OK.

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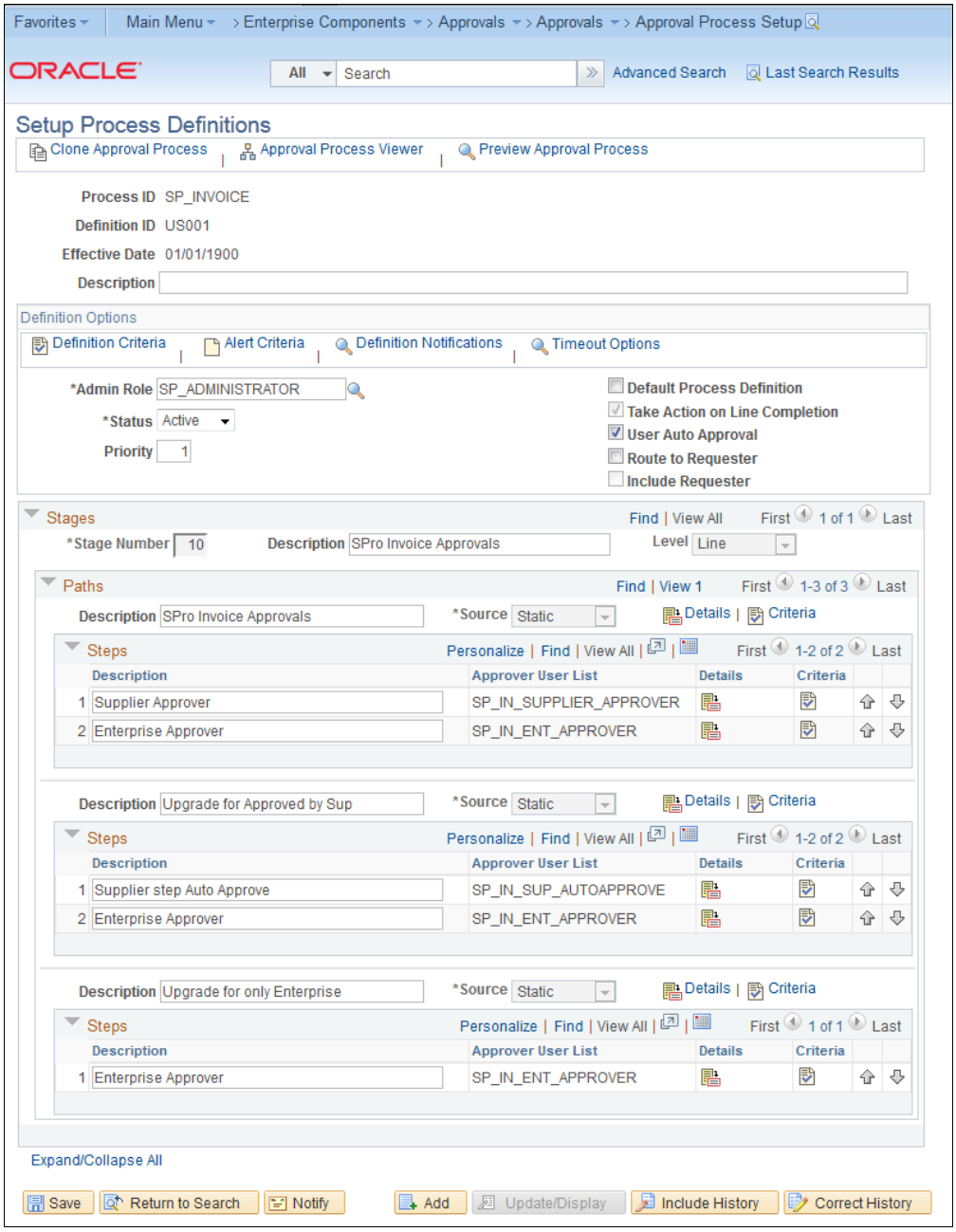
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    This example shows a process definition with a Line stage.



Setup Process Definitions page

11. For each stage, enter a description and select a level of *Header* or *Line.*
12. For each path, enter a description and select the source as *Static* or *Dynamic.*
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.

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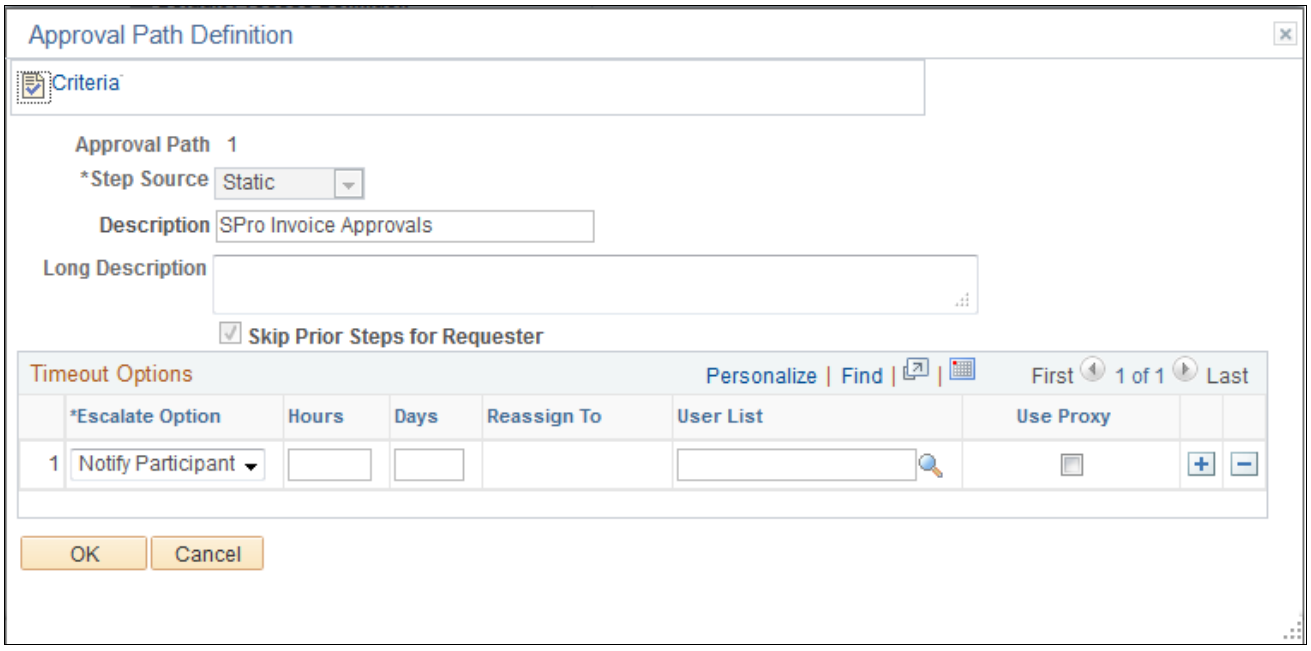
14. Click the Details icon for each path and set up the path details on the Approval Path Definition page, as required.

    In this example, the path details for SPro Invoice Approvals are set up on the Approval Path Definition page.



Approval Path Definition page

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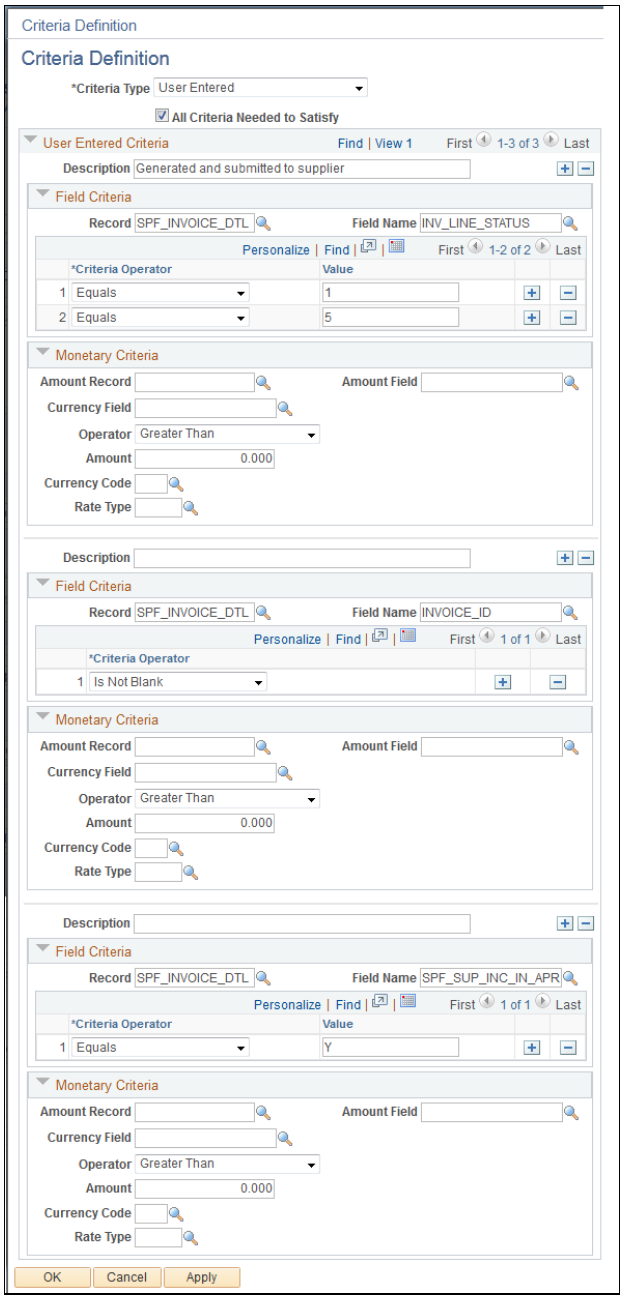
15. Click the Criteria icon for each path and set up the path criteria on the Criteria Definition page, as required.

    In this example, the path criteria definition for the SPro Invoice Approvals path has the field criteria defined as follows. The first record is set to *SPF_INVOICE_DTL*, the field name is set to *INV_LINE_STATUS*, the criteria operators are set to *Equals* and the values are set to *1* and *5*. The second record is set to *SPF_INVOICE_DTL*, the field name is set to *INVOICE_ID* and the criteria operator is set to *Is Not Blank*. The third record is set to *SPF_INVOICE_DTL*, the field name set to *SPF_SUP_INC_IN_APR*, the criteria operator set to *Equals* and the value is set to *Y*.



Criteria Definition page: Field Criteria

This example for the "Upgrade for Approved by Sup" path has the field criteria defined as follows. The first record is set to *SPF_INVOICE_DTL*, the field name is set to *INV_LINE_STATUS*, the criteria operator is set to *Equals*, and the value set to *6*. The second record is set to *SPF_INVOICE_DTL*, the field name is set to *SPF_SUP_INC_IN_APR*, the criteria operator is set to *Equals*, and the value is set to *Y*.

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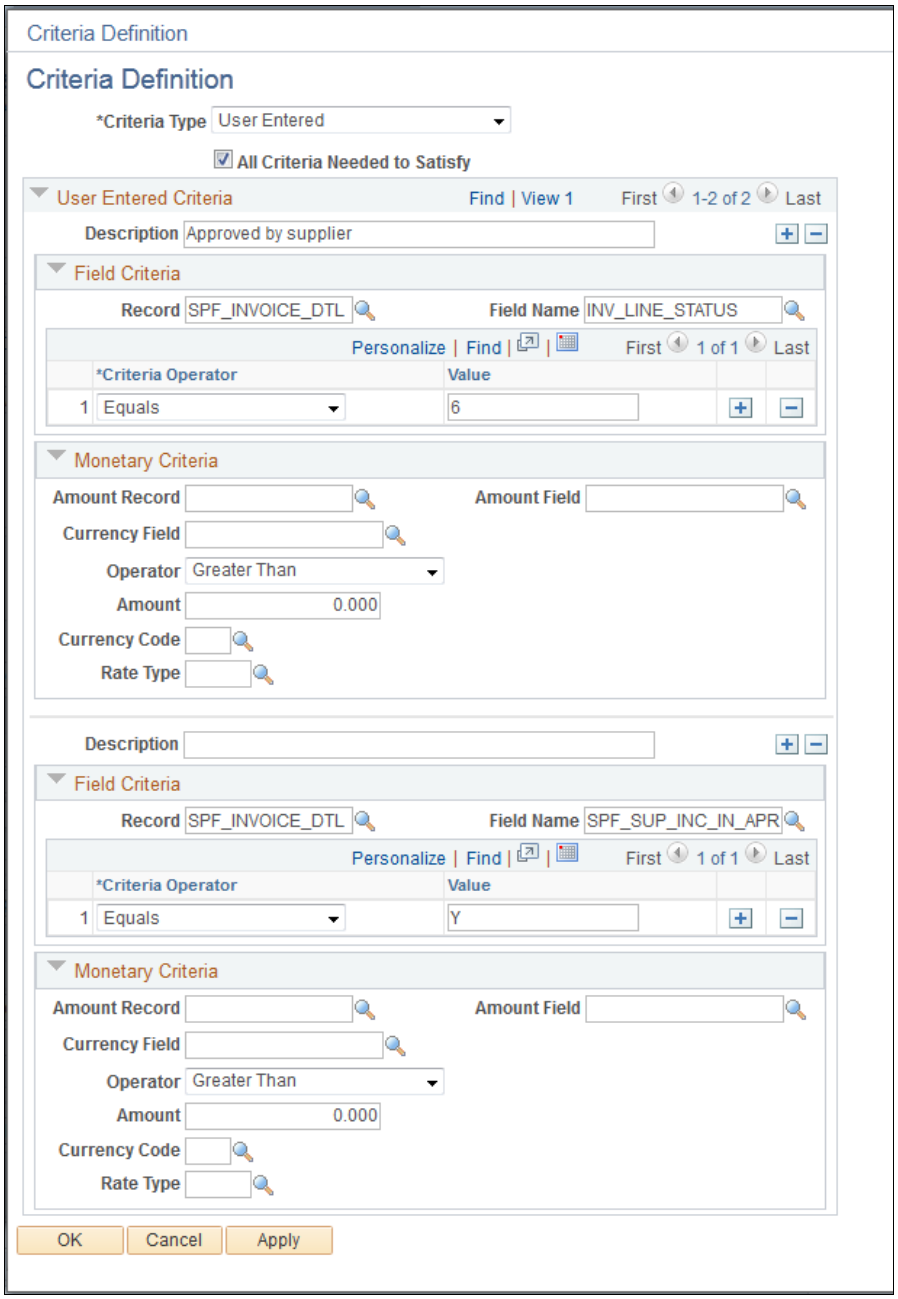

Criteria Definition page: Field Criteria

This example for the "Upgrade for only Enterprise" path has the field criteria defined as follows. The first record is set to *SPF_INVOICE_DTL*, the field name is set to *SPF_SUP_INC_IN_APR*, the criteria operator is set to *Equals* and the value is set to *N*. The second record is set to *SPF_INVOICE_DTL*, the field name is set to *INV_LINE_STATUS*, the criteria operator is set to *Equals*, and the value is set to *3*.

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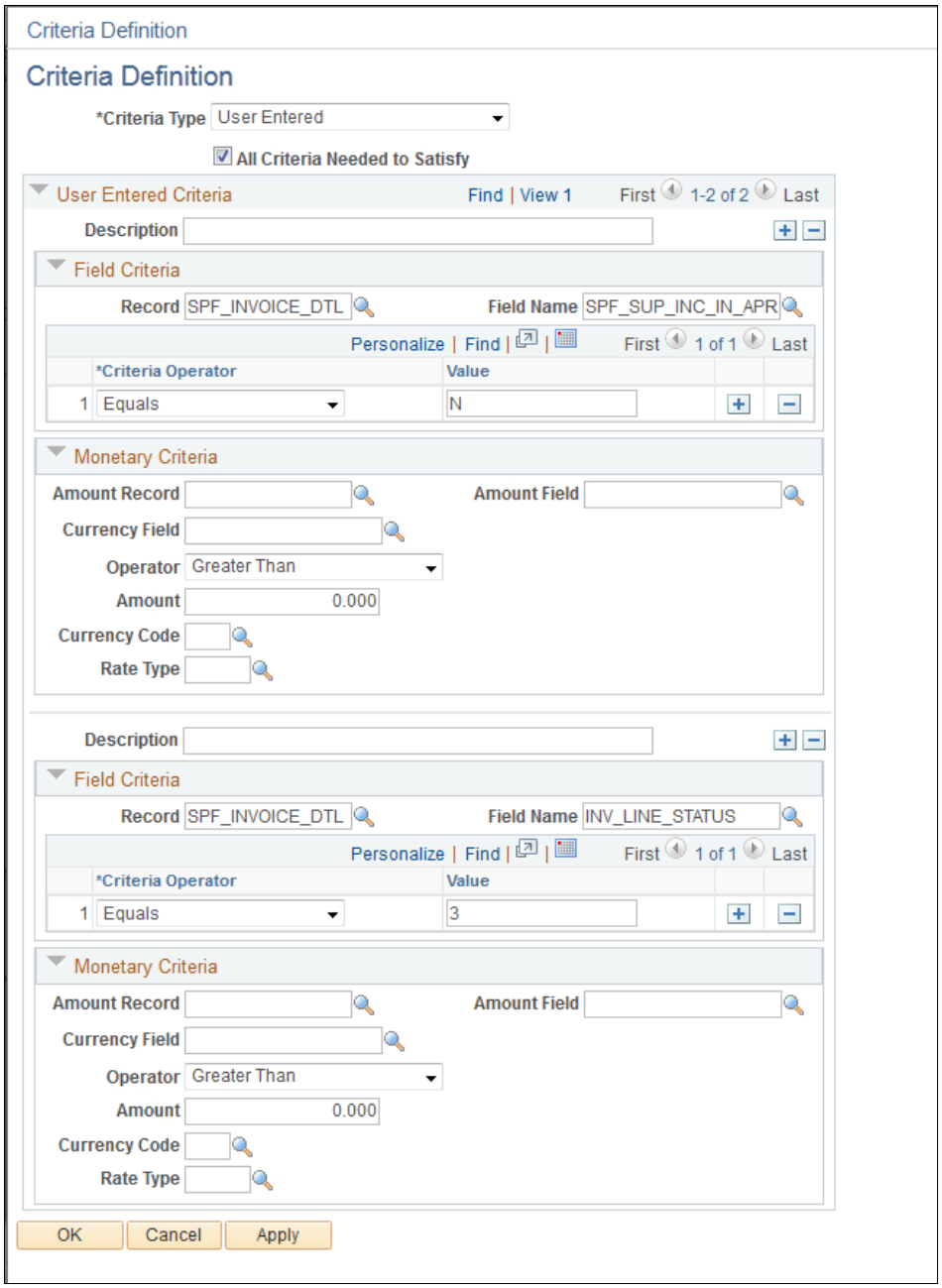

Criteria Definition page: Field Criteria

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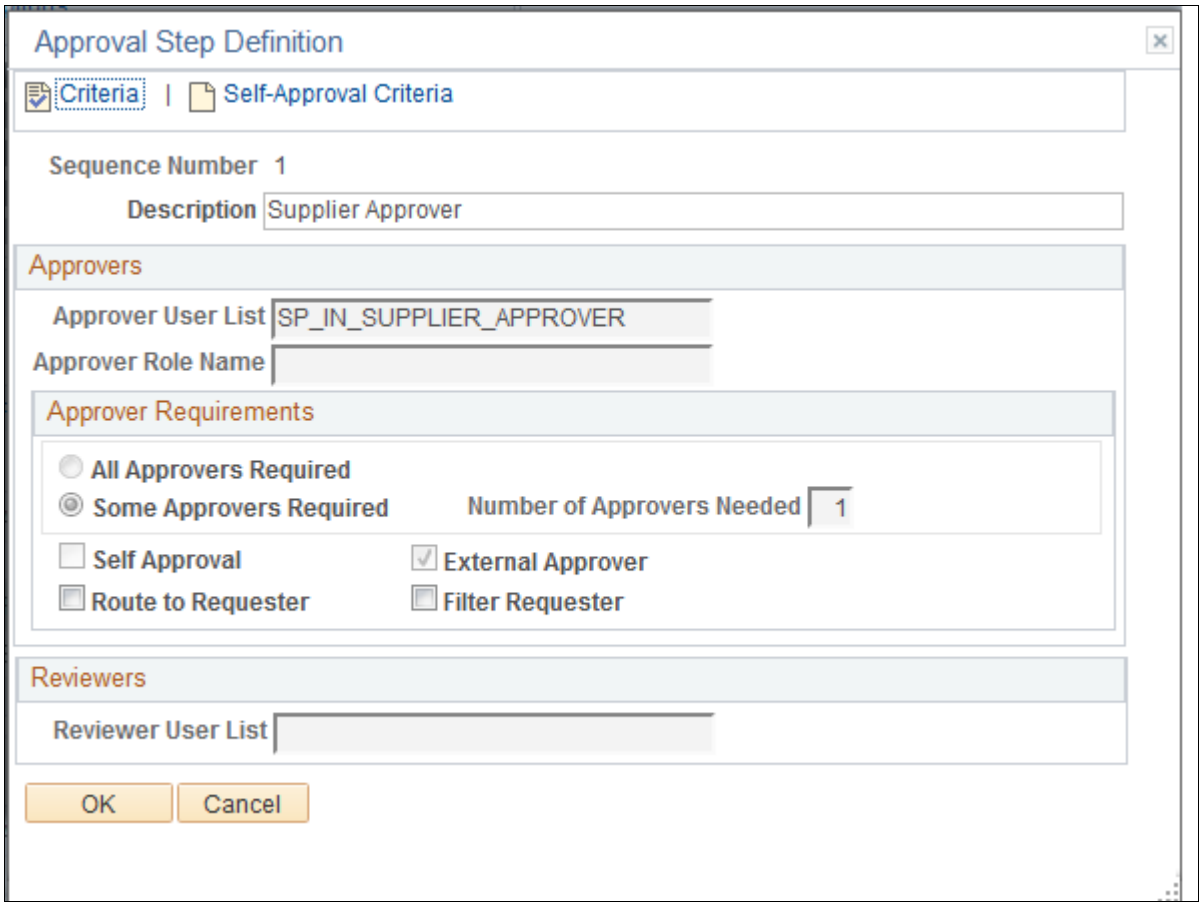
16. Click the Details icon for each step and set up the step details, as required.

    In this example, you should select the External Approver check box on the Approval Step Definition page for the Supplier Approver step in the sPro Invoice Approvals path.



Approval Step Definition page

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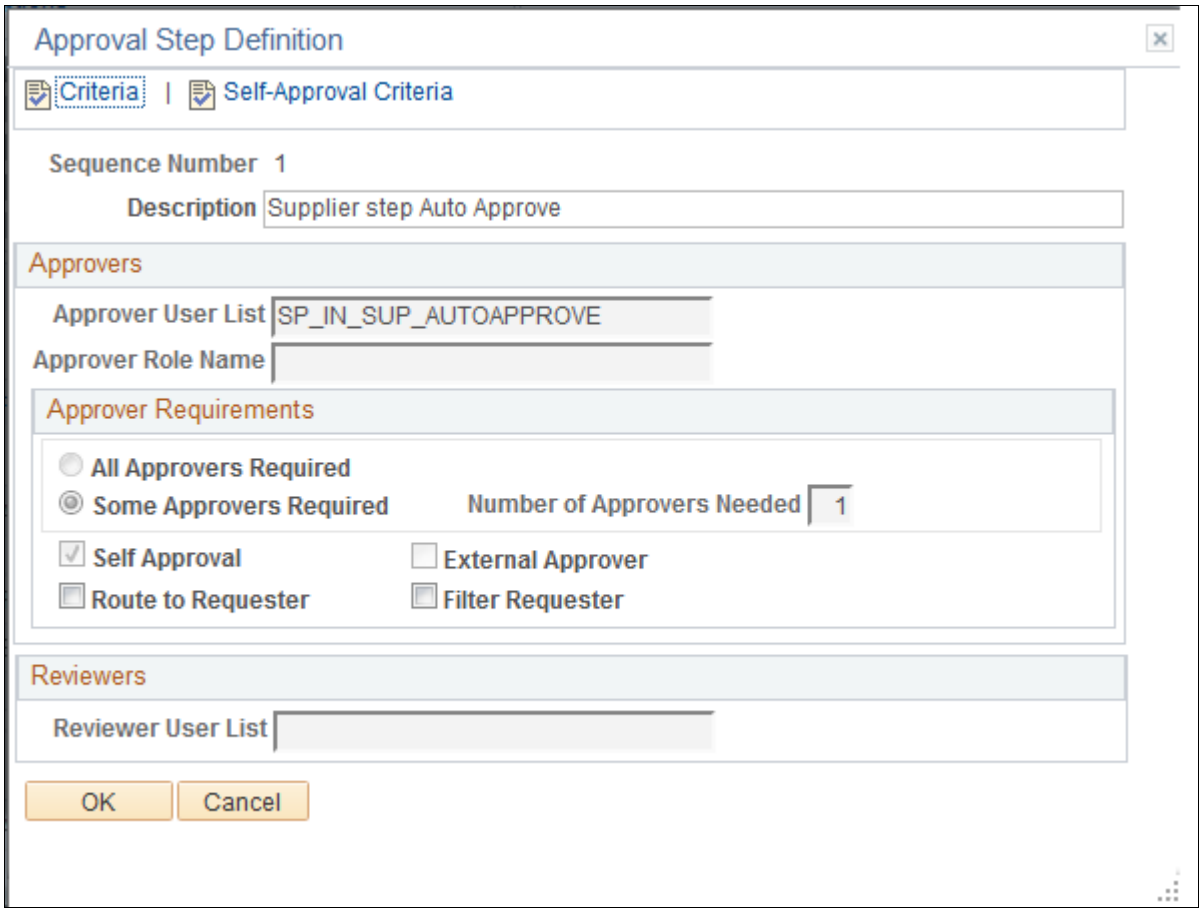
17. Click the Self-Approval Criteria link on the Approval Step Definition page to set up self-approval criteria.

    You can define field criteria or monetary criteria.

    This example shows the Self-Approval Criteria link selected on the Approval Step Definition page for the "Supplier step Auto Approve" step in the "Upgrade for Approved by Sup" path.



Approval Step Definition

    This example shows the self-approval Criteria Definition page for the "Supplier step Auto Approve" step.

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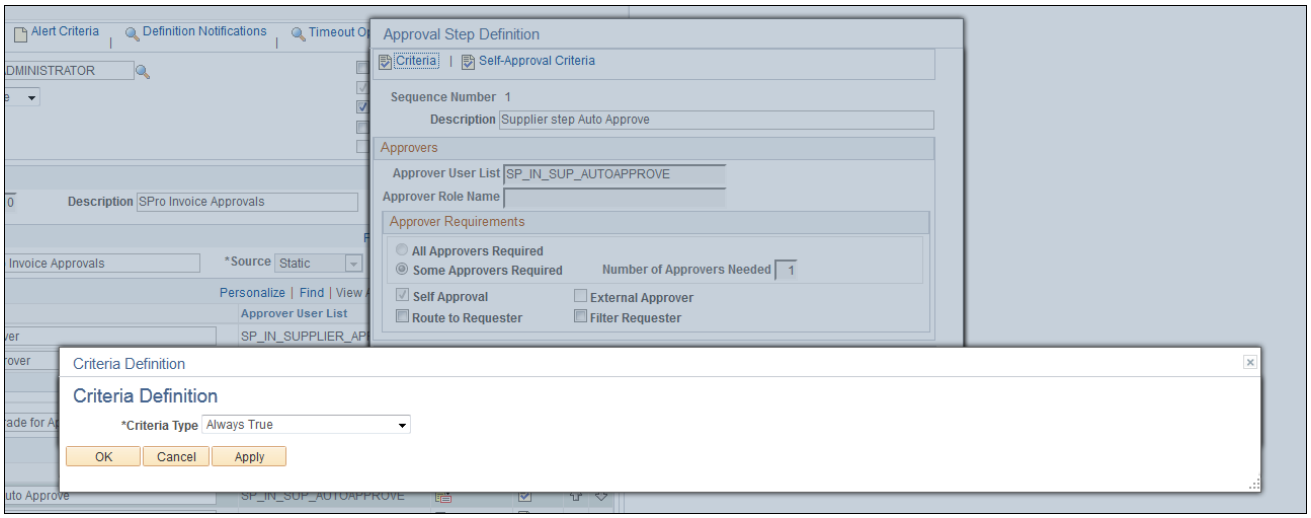

Criteria Definition page: Self-approval criteria

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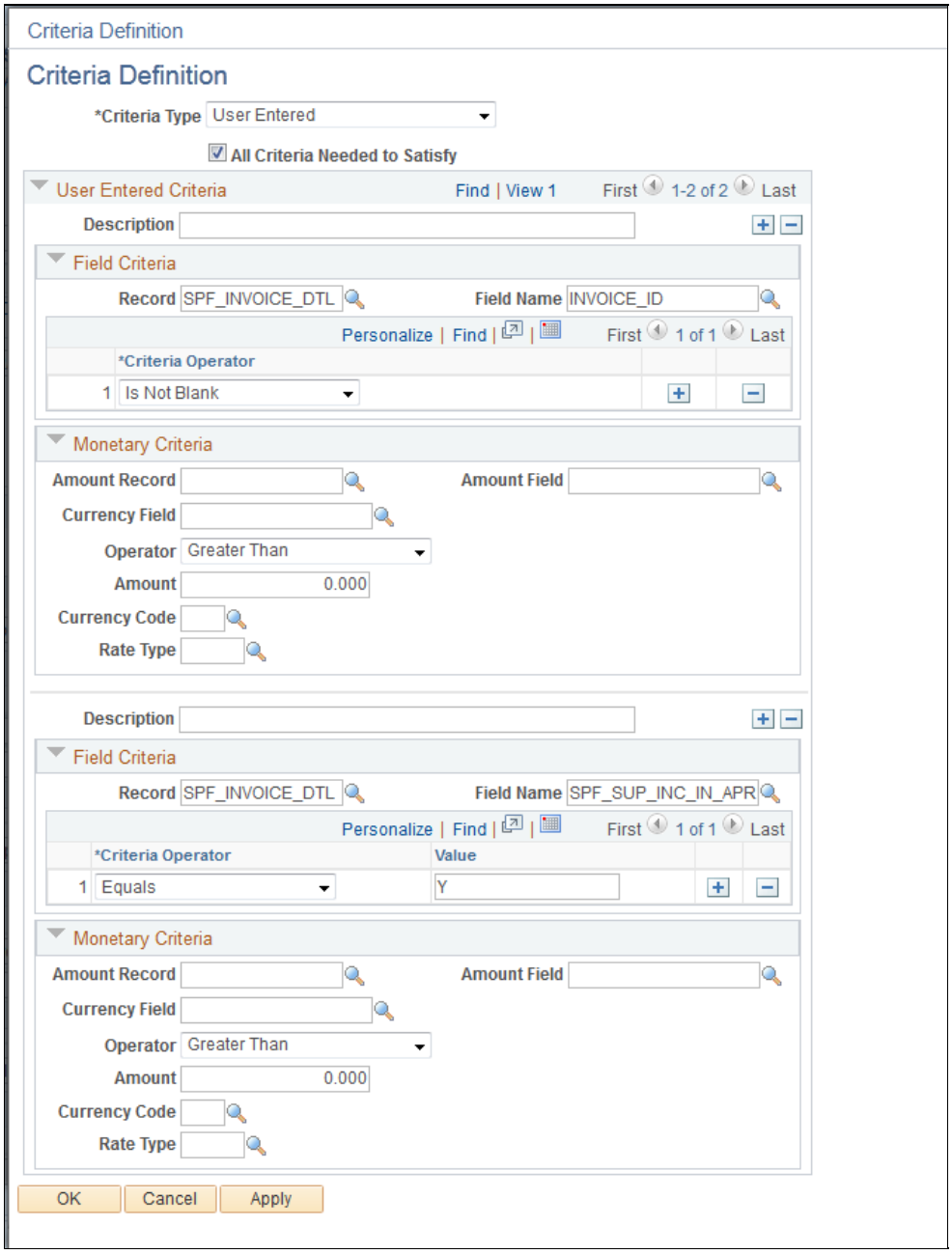
18. Click the Criteria icon for each step and set up the step criteria on the Criteria Definition page, as required.

    You can define field criteria or monetary criteria.

    For this example, the following field criteria should be set up for the Supplier Approver step in the SPro Invoice Approvals path. Set the first record to *SPF_INVOICE_DTL*, set the field name to *INVOICE_ID* and the criteria operator to *Is Not Blank.* Set the second record to *SPF_INVOICE_DTL*, set the field name to *SPF_SUP_INC_IN_APR*, the criteria operator to *Equals*, and the value to *Y*.



Criteria Definition page: Step criteria

This example shows the field criteria that should be set up for the Enterprise Approver step in the "Upgrade for only Enterprise" path. There will be just one field criteria record for this step. Set the record to *SPF_INVOICE_DTL*, set the field name to *INVOICE_ID* and the criteria operator to *Is Not Blank.*

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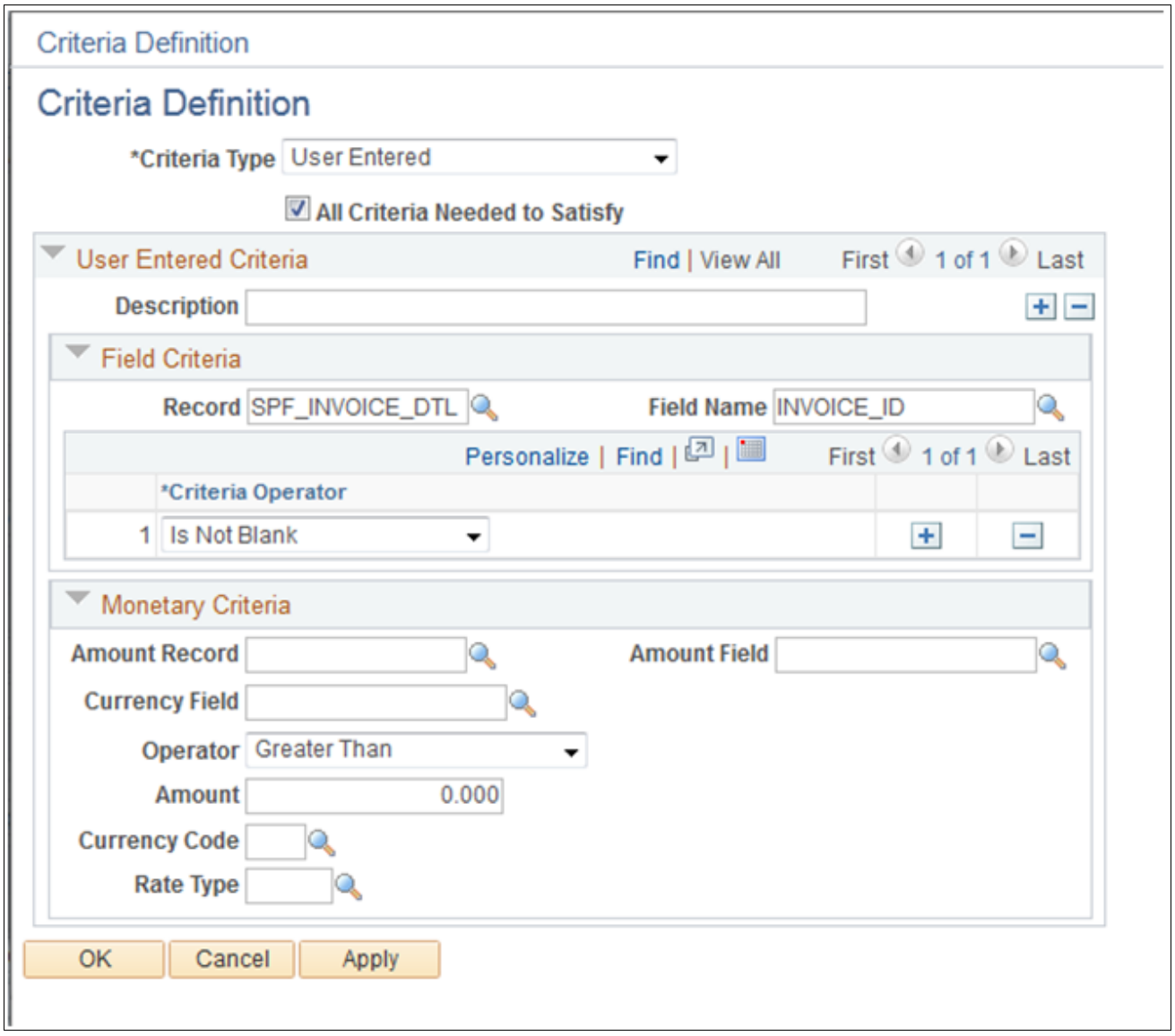

Criteria Definition page: Step criteria

19. Repeat steps 1 through 18 for each approval process definition that you need to set up.

Defining the EMP_SERVLET and SUP_SERVLET URLs

To define the URLs:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.

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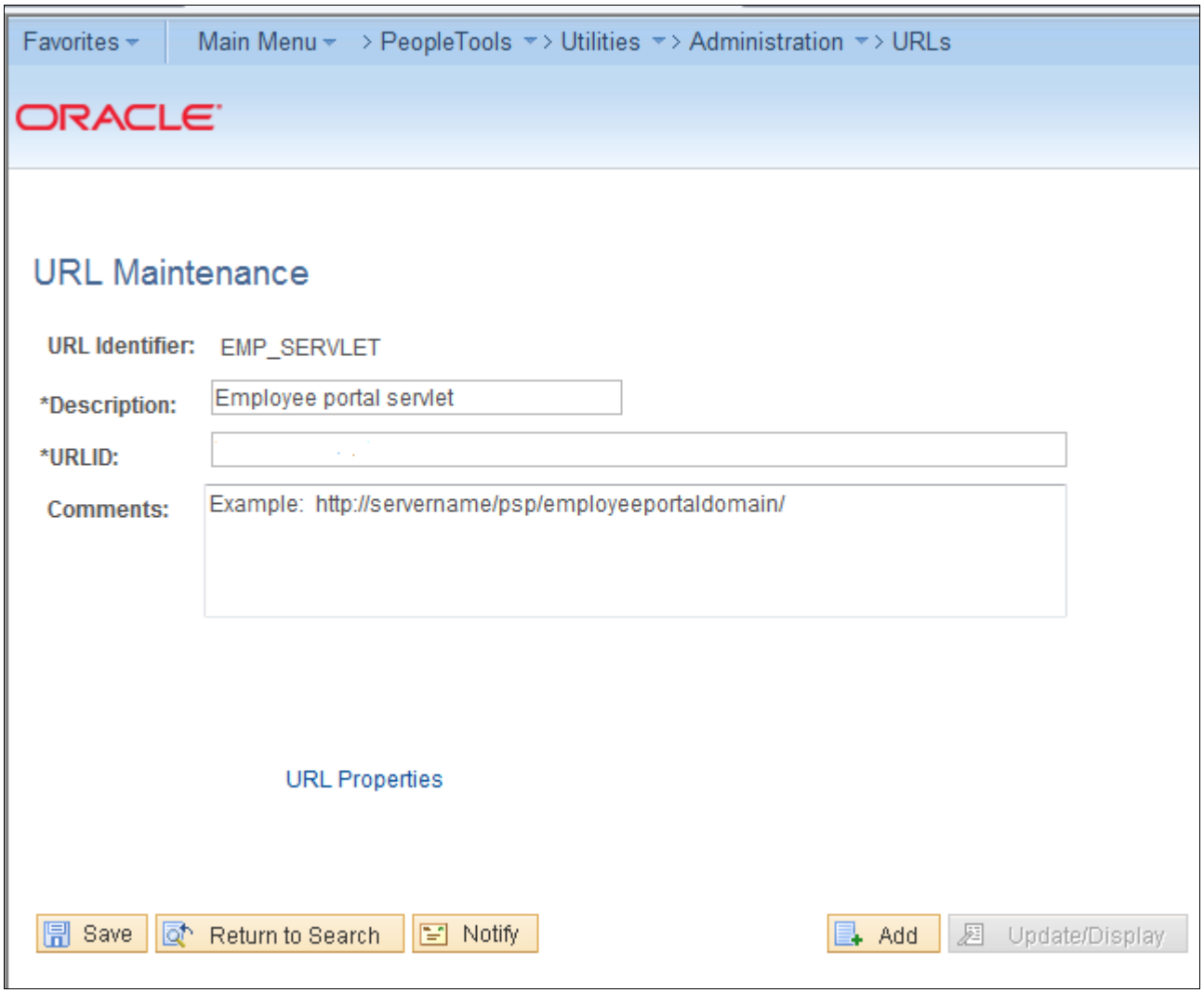
3. To define the URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.
6. Repeat steps 1 through 5 for the SUP_SERVLET URL variable.

Properties

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

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Task 6-23-11: Running the sPro Approvals Post-Upgrade Process

After the Approval Workflow Engine setup has been completed, run the sPro post-upgrade process to convert pending worklist entries for timesheets, expenses, progress logs, and invoices to Approval Workflow Engine worklist entries. This process also archives old worklist entries.

1. Select Set Up Financials/Supply Chain, Upgrade, sPro Approvals Post Upgrade.
2. Run the UPG_SP_POST process.

Properties

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

Task 6-24: Reviewing Strategic Sourcing Profile Questions

In previous releases, you defined PeopleSoft Strategic Sourcing profile questions individually in Bidder Registration Setup definitions with no master list. As of PeopleSoft FSCM 9.2, Bidder Registration Setup definitions have been replaced with Registration Templates and a Profile Questions master list has been introduced. You now select profile questions from the master list for each Registration Template. As part of the upgrade process, all existing profile questions in each of the existing Bidder Registration Setup definitions will be added to the new master list of profile questions.

If you have been using multiple Bidder Registration Setup definitions and have defined the same or similar profile questions in those Bidder Registration Setup definitions, you should review the master list of profile questions created after the upgrade to determine whether you would like to discontinue use of duplicate questions. If so, you will need to modify the Registration Templates to associate the desired profile questions.

To review and update profile question selection:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Suppliers, Profile Questions.
2. Review the profile questions and note any duplicates.
3. If any duplicates are discovered, decide which questions you want to continue to use and which you no longer want to use.
4. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Suppliers, Registration Template Setup.
5. Search for existing templates.
6. Select a template and click the Profile Questions tab.
7. Review the list of selected profile questions for the Registration Template.
8. If any of the selected profile questions are among those that you decided to no longer use, clear the check box for that row and select the check box for the profile question that you want to replace it.
9. Repeat steps 6 through 8 until you have reviewed all Registration Templates.

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Properties

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

Task 6-25: Completing Supplier Contracts Setup

This section discusses:

- Synchronizing the SCMT Library with Bind Mappings
- Reviewing Worklist Entries and Email Notifications
- Copying Attachments to the Database Server
- Creating a Document Change History Record

Task 6-25-1: Synchronizing the SCMT Library with Bind Mappings

If you have implemented Oracle's PeopleSoft Supplier Contract Management, you need to perform this task.

The Purchase Order source transaction is a new source transaction delivered as of PeopleSoft FSCM 9.1. This task ensures that any existing PeopleSoft Supplier Contract Management (SCMT) library objects are synchronized with any applicable new bind mapping values that were delivered for the new Purchase Order source transaction.

Since library objects can belong to more than one source, this process reviews all existing library objects to see whether they are applicable to the new Purchase Order source transaction. Every library object has attributes that define which source transactions are applicable based on the binds used within the object. So, if an existing library object has binds that are also applicable in the new source, then it has to be updated to reflect that.

To synchronize the library objects with the new bind mapping values for the new Purchase Order source transaction:

1. Select Set Up Financials/Supply Chain, Upgrade, SCMT — Upgrade Bind Mappings.
2. Create a new run control ID.
3. Click Run to submit the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

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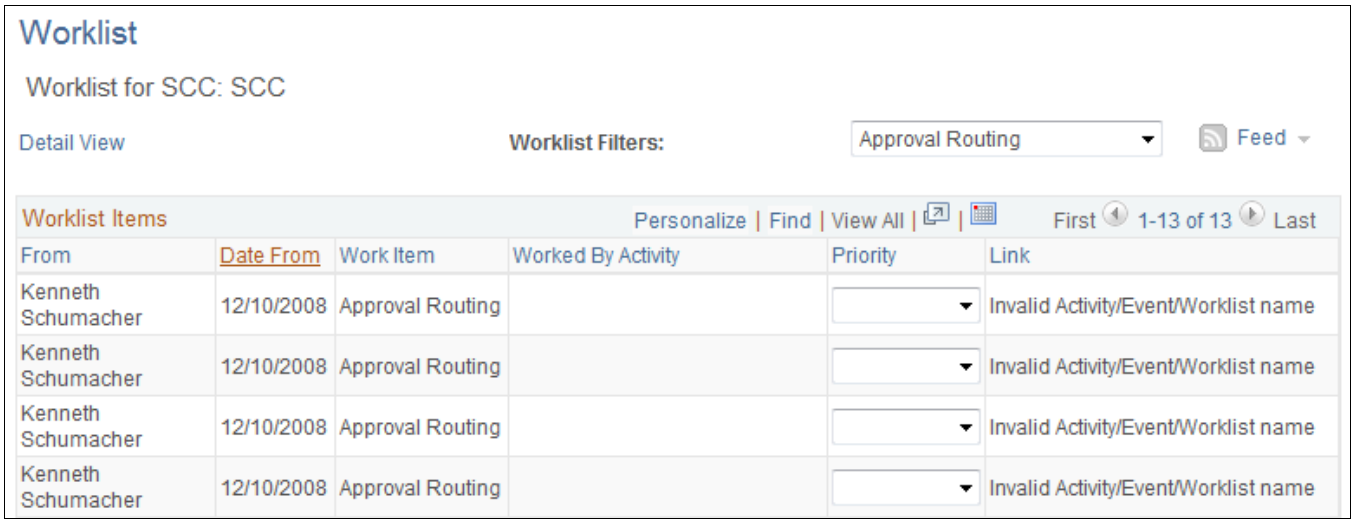
Task 6-25-2: Reviewing Worklist Entries and Email Notifications

In the new release, the Work Item name "Approval Routing" changed to "Contract Compliance Notice" and the Worked by Activity name "Redirect" changed to "Review or Update Agreement." As a result, if you did not complete the processing of your worklist entries before the upgrade in the chapter "Preparing Your Database for Upgrade," task Processing Worklist Entries and Email Notification, you will no longer to able to access the old worklist entries or process them after the upgrade. You will need to resend the notifications.

If you did not clear your worklist entries before the upgrade, they will appear on the Worklist page as invalid entries, as shown in the following example:



Worklist page

Click Search and update the information on the Update Agreement Statuses page.

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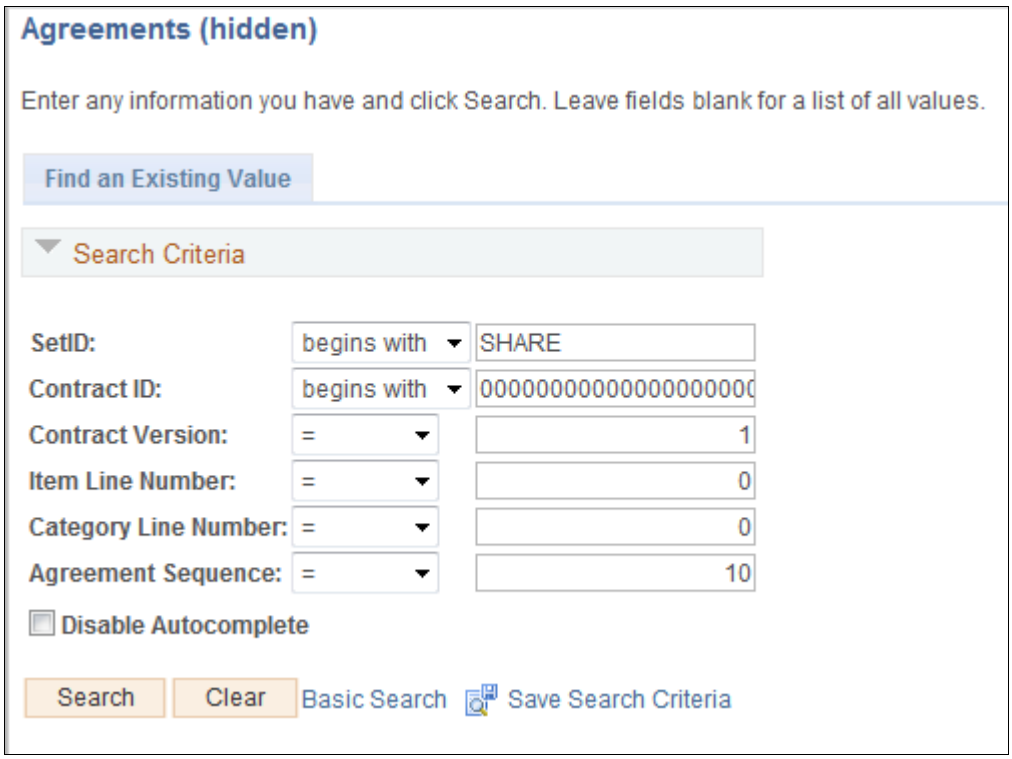
For email notifications that you did not process before the upgrade, when you select an email link, the system will bring you to a search dialog with the information from the email filled out, as shown in the following example:



Agreements search page

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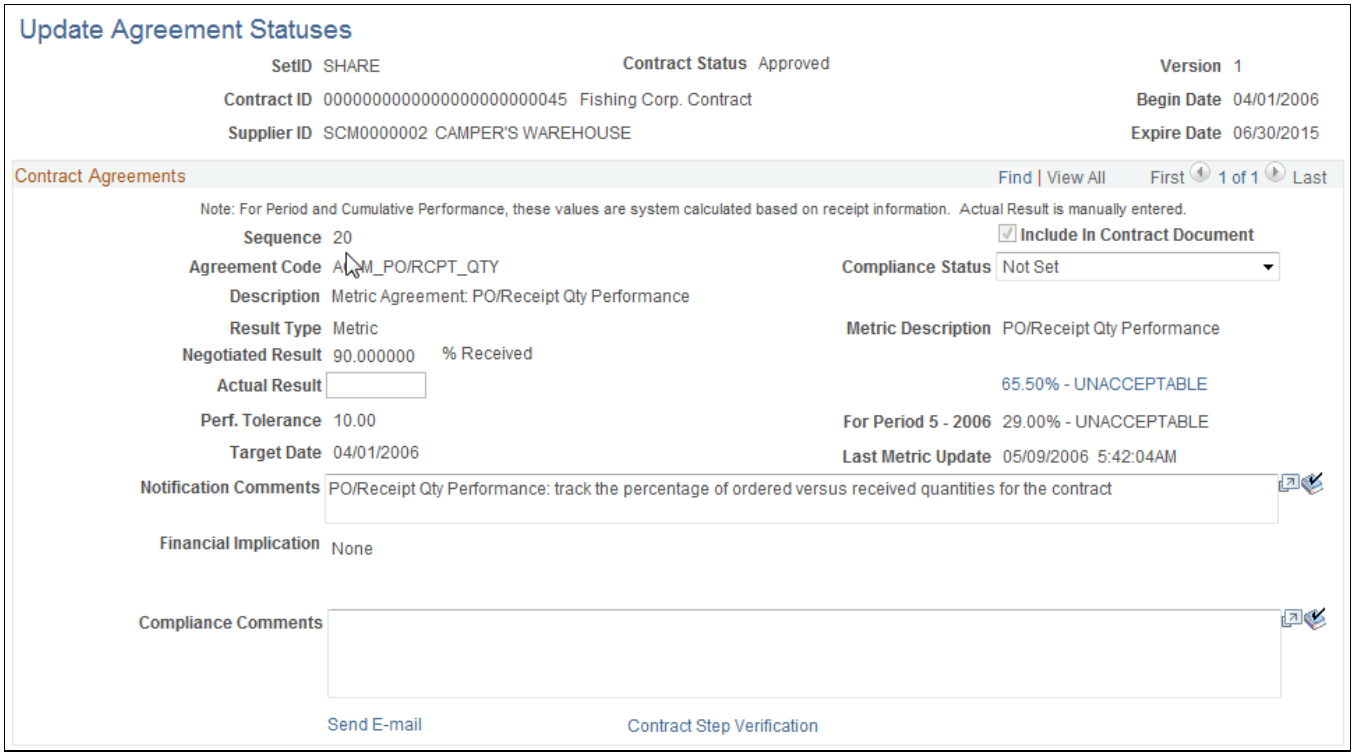
Click Search and the Update Agreement Statuses page appears. You can then update the information as needed. Following is an example of the Update Agreement Statuses page.



Update Agreement Statuses page

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

Task 6-25-3: Copying Attachments to the Database Server

This section discusses:

- Understanding Copying Attachments
- Setting Up the Database Server
- Running the Copy Process

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Understanding Copying Attachments

If you have implemented PeopleSoft Supplier Contract Management (SCMT) prior to PeopleSoft FSCM 9.1 and want to use the database server option instead of the FTP server for PeopleSoft SCMT attachments (files that include authored documents and attachments), then you need to perform this task. As of PeopleSoft FSCM 9.1, you can use the database server for all attachments in PeopleSoft SCMT.

PeopleSoft FSCM 9.1 or later provides a utility that allows you to upgrade FTP server attachments from prior releases to the database server, ensuring that all existing FTP attachments are copied to the database server and all related links are updated to point to the new location. The new utility is specifically intended for PeopleSoft SCMT customers on releases prior to PeopleSoft FSCM 9.1 who are currently using FTP for PeopleSoft SCMT (installation option for FTP server override), but are using the database server for all other Supplier Relationship Management (SRM) products in releases prior to PeopleSoft FSCM 9.1.

This utility allows a one-time movement of PeopleSoft SCMT documents from FTP to the database after upgrading to PeopleSoft FSCM 9.1 or later. You can optionally continue to run supplier contracts in FTP as you did in prior releases, if desired. This process will only upgrade files that exist on the contract documents from releases prior to PeopleSoft FSCM 9.1. This means that it does not upgrade files related to new features in PeopleSoft FSCM 9.1 or later, such as the Executive Summary, external attachments, and signature files. If this process is run *after* you have used these new features in PeopleSoft FSCM 9.1 or later, the newly added documents and attachments will not be upgraded. Note that this process will not upgrade any transaction-related attachments for SRM products outside of PeopleSoft SCMT. This process will select documents as instructed by the run control selection criteria, finding the FTP document, amendment, and manually loaded attachments in both the main and history files. It will then load the files to the database server and update the references to point to the database server. It uses the existing file names.

Note that this process loads the FTP files to a temporary location, then uploads them from there to the database server. The temporary server is determined by the TEMP environment variable on your application server machine, and if that does not exist then the TMP environment variable is used. You should manually remove the files from the temporary server after processing is complete. Also, this process does not remove the files from the FTP server. If you wish to do so, you must be careful to only remove the files that are on the database server. You can determine which files are on the database server by looking at PV_ATTACHMENTS where the server points to a database server. This is a single-direction utility with no *undo* capability for PeopleSoft SCMT. If you decide to switch back from database to FTP server, then any new document activity, such as checkins or uploads, used in PeopleSoft SCMT will remain within the database until they are checked back in or uploaded after switching back to FTP.

Before completing this task, note that this process should be run post-upgrade. Ideally all documents should be migrated before resuming normal database activity. If this is not feasible, the process can be run after PeopleSoft FSCM 9.1 or later entry has begun. But be sure that your file attachment server is pointing to a database server and that the Override Attachment Server field (mentioned in step 3 in the instructions below) is blank. If it is pointing to an FTP server, and new features in PeopleSoft FSCM 9.1 or later such as Executive Summary, external files, and signature files have been used, these types of new files will not be copied to the database server.

Follow the steps below to set up the database server and then run the process, which will copy your pre-PeopleSoft FSCM 9.1 SCMT documents and attachments to the database server.

Setting Up the Database Server

You must make sure that you are using the database server before running the utility.

To set up the database server:

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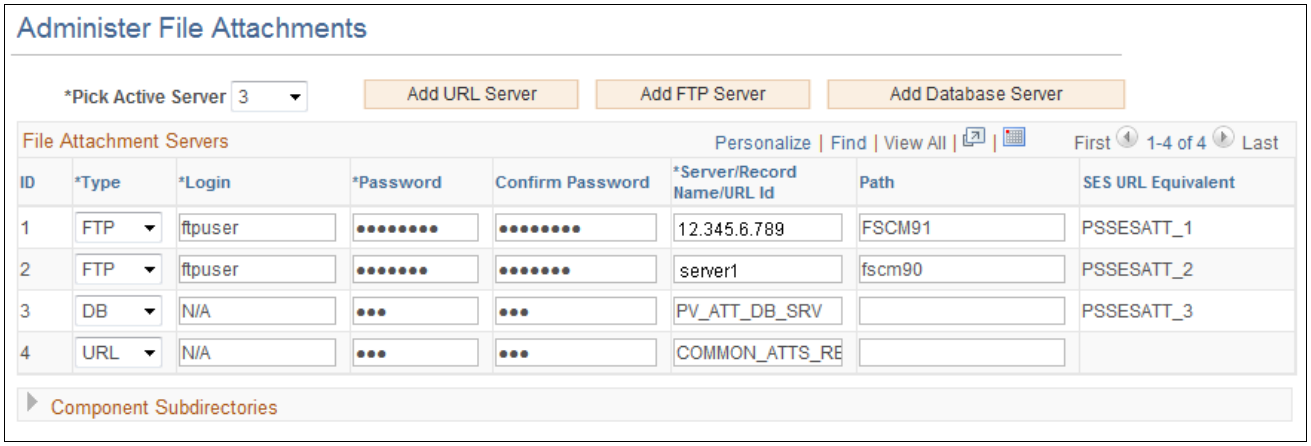
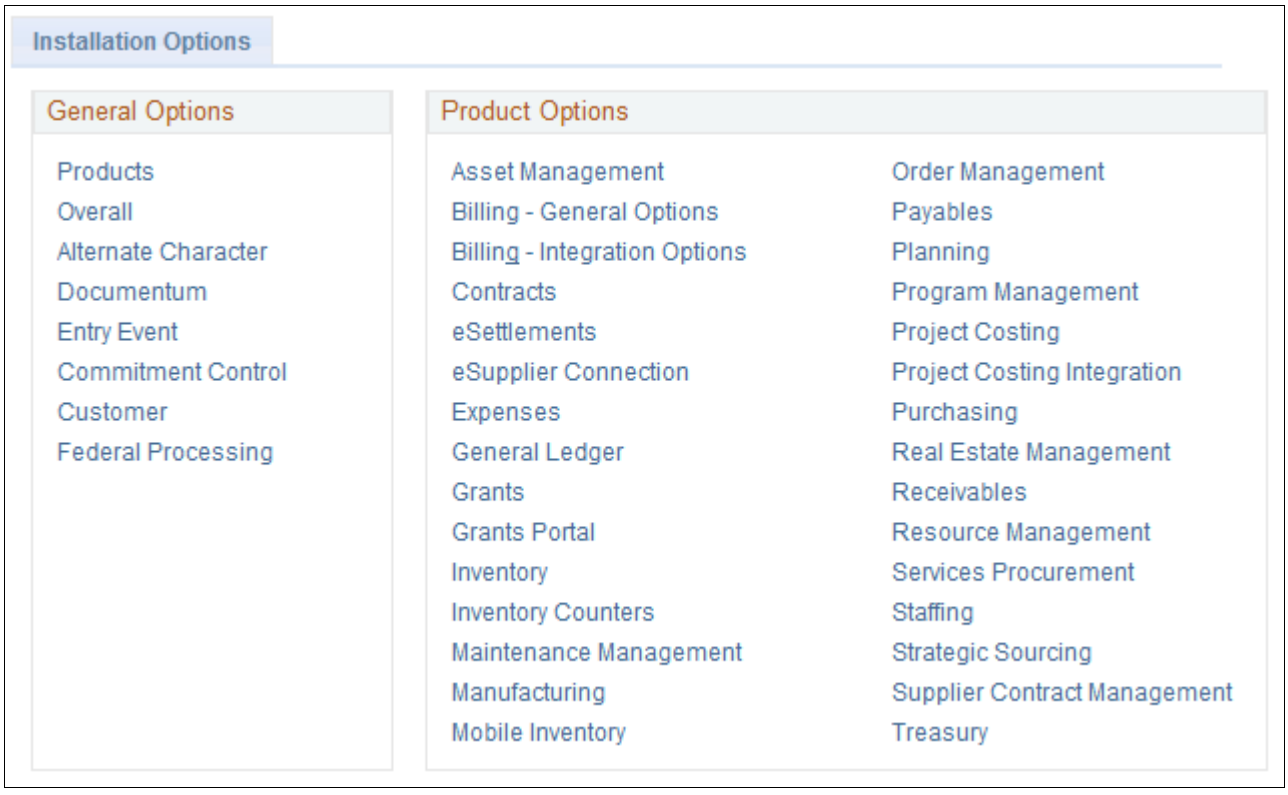
1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.
   The Administer File Attachments page appears.



Administer File Attachments page

2. Ensure that the value in the Pick Active Server field points to a server of the type DB.
3. Select Set Up Financials/Supply Chain, Install, Installation Options.
   The Installation Options page appears.



Installation Options page

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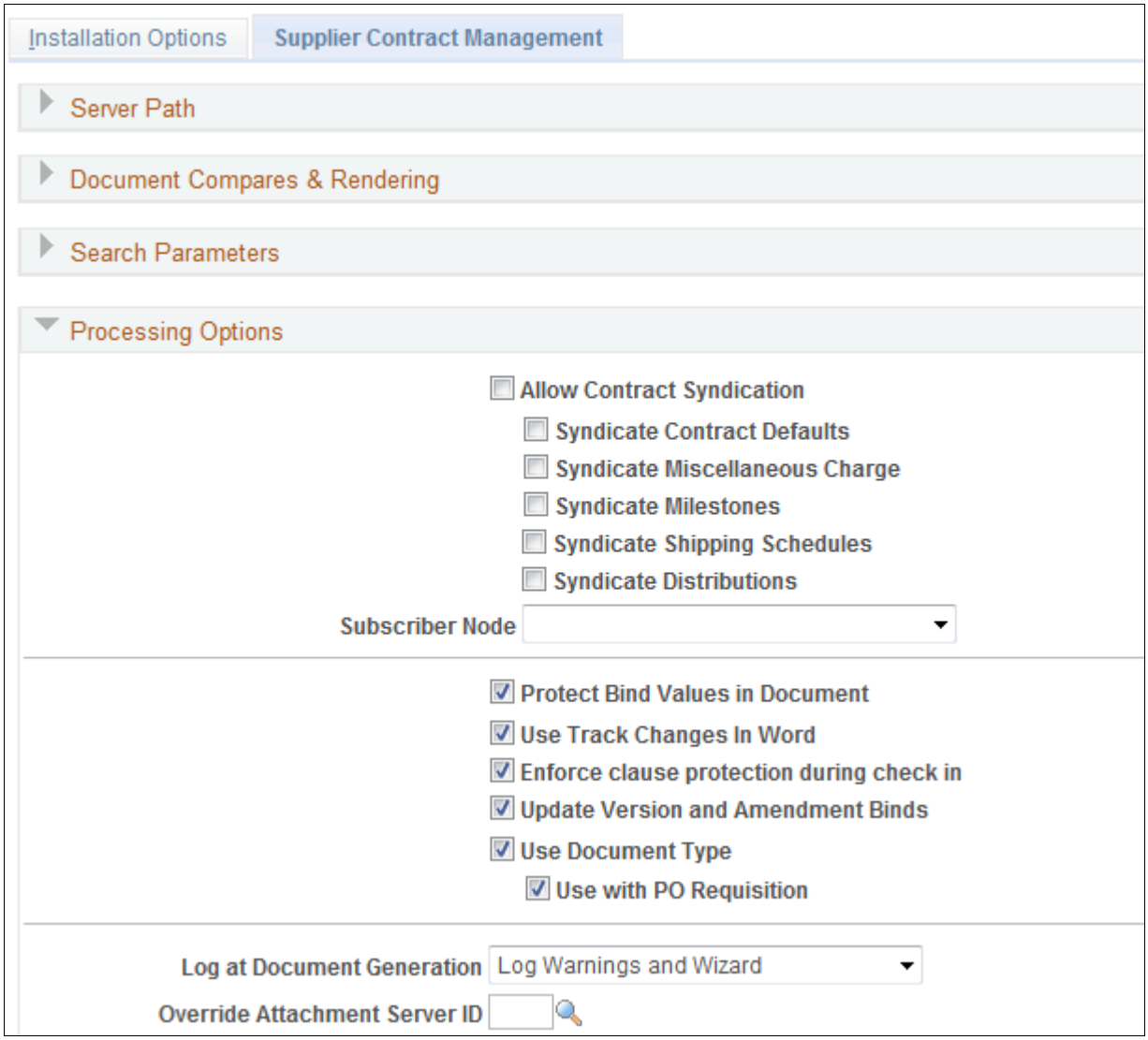
4. Select the Supplier Contract Management link.

   The Supplier Contract Management page Processing Options section appears.



Supplier Contracts Management page: Processing Options section

5. On the Supplier Contract Management Installation Options page, ensure that the Override Attachment Server field is either blank or refers to a server of the type DB.

Running the Copy Process

Run the program to copy the documents and attachments from the FTP server to the database serer.

To run the copy process:

1. Select Set Up Financials/Supply Chain, Upgrade, SCMT — Upgrade Attachments.

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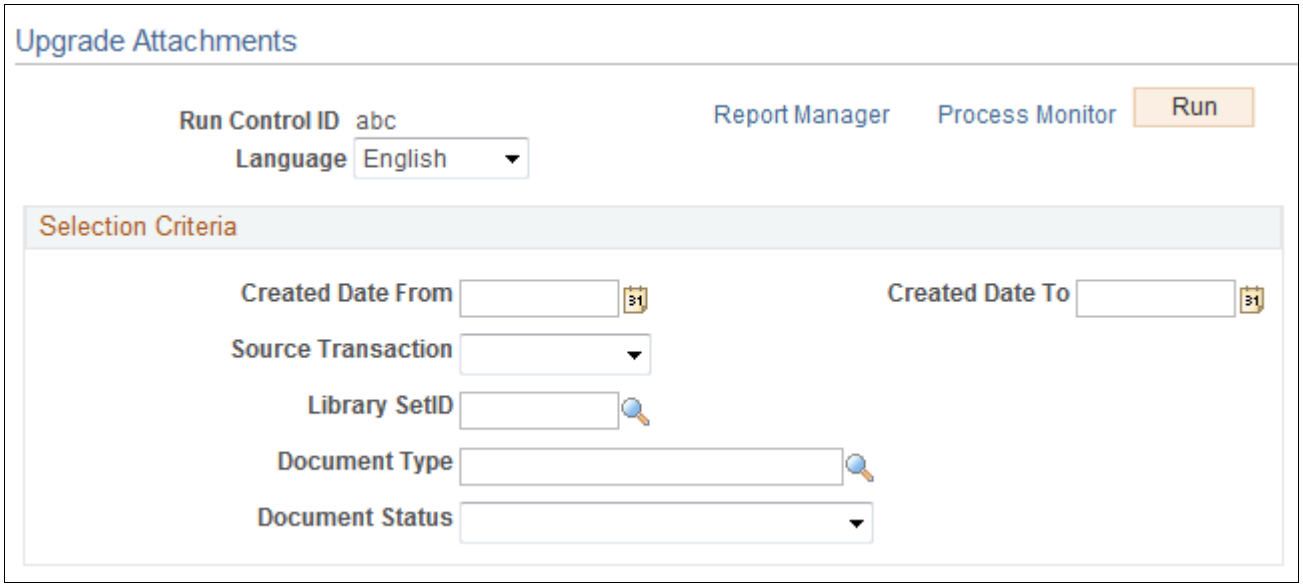
2. Create a new run control ID.

   The following example shows the Upgrade Attachments page:



   Upgrade Attachments page

3. Optionally, you can enter selection criteria to process a subset of documents at a time.

   This may be necessary to reduce job run time. If entering selection criteria, be sure to eventually run through all possible options so all documents and attachments are upgraded.

4. Click Save.

   Note that you will receive a warning message if the database server is *not* the default server. If you click Run at this point, the process will still run but nothing will be processed. The process will issue a log message explaining the error.

   You will also receive a warning message if the number of impacted contracts based on your selection criteria exceeds 100. This job could take significant time, depending on the number of files per document. You may want to consider refining your selection criteria depending on system performance. Note that when the process is started, it will only select those documents within the selection criteria range that are on the FTP server. So in the case where the user selects a range of 100 documents for which this process has already run and no documents are left on the database server, nothing will be processed.

5. Click Run to submit the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

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Task 6-25-4: Creating a Document Change History Record

A new report is delivered as of PeopleSoft FSCM 9.1 to show all contract object deviations in contract documents. Prior to PeopleSoft FSCM 9.1, only the latest changes were being tracked and stored in the database. Without running this post-upgrade step, the report will only show the current object deviations in the contract documents and exclude all changes in previous amendments.

This post-upgrade utility will create a record of the historical changes to all authored contract documents for historical deviation reporting purposes. The process involves downloading the original contract document from the FTP server, parsing the file, and comparing the original document content with the current document content.

This utility can be run any time after your database is upgraded to the new release. It has no impact on new contract documents created after the upgrade.

To create an historical record of document changes since the documents were created:

1. Select Set Up Financials/Supply Chain, Upgrade, SCMT — Prior Object Deviations.
2. Create a new run control ID.
3. Enter criteria or leave all criteria blank to obtain changes for all documents.

   If you have large volumes of documents, it is recommended that the documents be processed in smaller sets by using selection criteria such as the Created Date From and Created Date To fields. The process can be run multiple times and will ignore any documents that already have correct history information.
4. Click Save.

   You will see the number of contract documents to be processed, based on the selection criteria that you entered.
5. Click Run to submit the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

Task 6-26: Configuring PayBill Management

This section discusses:

- Configuring Reopen Assignments Options

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Task 6-26-1: Configuring Reopen Assignments Options

In the new release, the Staffing Installation page has a Reopen Assignments Options section with two new check boxes: Allow Reactivate Closed Assign and Allow Additional Assignments. If you are reusing employee job records in assignments for one employee, the option Allow Reactivate Closed Assign will be set to *No* and the option Additional Assignments will be set to *Yes.* If you have never reused employee job records in assignments for one employee, those two options will be cleared and you will need to select one of the options before you can create new assignments. After the upgrade, you will need to decide whether you want to be able to reactivate a closed assignment, or whether you want to use the job data model that allows you to reuse records for Staffing Assignments. Those two options are mutually exclusive.

To configure Reopen Assignments Options:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Select Staffing.
3. In the Reopen Assignments Options section, select Allow Reactivate Closed Assignments or Allow Additional Assignments.

Important! Once you save the page, you cannot change this option.

See the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release for more information about setting up application-specific installation options.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Pay/Bill Management	All	All

Task 6-27: Preparing Treasury Setup

This section discusses:

- Rerunning Auto Position Process

Task 6-27-1: Rerunning Auto Position Process

In this step, you will rerun the Auto Position processes for all deals. This action will process every deal to calculate the cash flows, position, and accounting events, which will reflect changes to the deals during the upgrade.

To rerun the Auto Position processes:

1. Select Deal Management, Capture Deals, Deal Position Update.
2. Select the Process All Outstanding Deals option and run the process.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management Risk Management	All	All

Task 6-28: Completing Setup for Government Contracts

This section discusses:

- Understanding Completing Setup for Government Contracts
- Summarizing Excess Amounts
- Running the Limits Process

Understanding Completing Setup for Government Contracts

In this task, you complete the setup for Government Contracts by creating Amount in Excess rows.

Note. Perform this task *only* if you plan to use Government Contracts and plan to use summarization for Over the Limit (OTL) rows by creating new Amount in Excess rows in order to report Amount in Excess on the prescribed SF1034-1035 invoice formats.

Task 6-28-1: Summarizing Excess Amounts

This release provides new functionality that allows you to summarize Over the Limit rows by creating new Amount in Excess rows in the project costing table PROJ_RESOURCE. This functionality is available *only* for contracts with the classification for government contracts "GOV" and enables you to report Amount in Excess on the prescribed SF1034-1035 invoice formats.

To use summarization:

- Select Set Up Financials/Supply Chain, Installation Options, Contracts.
- On the Contracts Installation Options page, select the check box "Summ. Limit for Govt Contracts."

Note. If you have selected the "Separate Billing and Revenue" option, then when you select the "Summ. Limit for Govt Contracts" check box, additional Billing/Revenue-related options become available for specifying summarization details for government contracts. To separate Billing and Revenue, select Set Up Financials/Supply Chain, Install, Installation Options, Contracts, and in the Other Installed Options group box select the "Separate Billing and Revenue" option.

You can provide additional details relating to the resource type, category, and subcategory in the columns for the new Amount in Excess rows in the Project Resource table. To set up these columns to be populated with additional details, select Set Up Financials/Supply Chain, Business Unit Related, Contracts, Contracts Definition, and then select the Excess/Reclaim Definitions tab. This tab will be visible on the Contracts Definition page *only* if you selected the "Summ. Limit for Govt Contracts" check box on the Contracts Installation Options page.

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Once you have selected the check box "Summ. Limit for Govt Contracts" on the Contracts Installation Options page, you must run the limits process in order to correctly reflect the amount in excess for a contract or contract line.

See Running the Limits Process.

Properties

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

Task 6-28-2: Running the Limits Process

In this step, you run the limits process in order to correctly reflect the amount in excess for a contract or contract line.

To run the limits process:

- Select Customer Contracts, Update Contract Progress, Process Limits.
- Enter a run control ID.
- Select the Process Billing options.
- Specify additional selection criteria as needed, and click Run.
- Specify the server, and then click OK.

When the limits process is complete, the system will create *new,* summarized Amount in Excess rows in the PROJ_RESOURCE table against the Project/Activities associated with the Contract/Contract Line if the Billable/Billed transaction amounts exceed the specified limit. These new transaction rows are identified by the flag in the AMOUNT_IN_EXCESS column in the PROJ_RESOURCE table being set to *Y* and a negative amount equivalent to all the available Over the Limit rows for the Contract/Contract Line.

If you have chosen to separate Billing and Revenue, then the system will create *new,* summarized Amount in Excess rows in the PROJ_RESOURCE table against the Project/Activities associated with the Contract/Contract Line if the Revenue-related transaction amounts exceed the specified limit. These new transaction rows are identified by the flag in the AMOUNT_IN_EXCESS column in the PROJ_RESOURCE table being set to *Y* and a negative amount equivalent to all the available Revenue over the Limit (ROL) rows for the Contract/Contract Line.

After the limit process is complete, any existing OLT or ROL rows in the PROJ_RESOURCE table pertaining to Government Contracts will be redundant and will not be used by the limits process in any way. You need to manually delete these redundant OLT or ROL rows according to your business processes and discretion. No scripts have been provided for deleting these OLT or ROL rows because PROJ_RESOURCE is a key transaction table.

Properties

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

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Task 6-29: Completing Setup for Projects

This section discusses:

- Setting Up Analysis Type and Analysis Group
- Running Summary Refresh
- Entering the Funds Distribution Threshold Amount
- Creating a Project Compression Template

Task 6-29-1: Setting Up Analysis Type and Analysis Group

Many analysis types and analysis groups are integral to project processes. The upgrade delivers any additions or changes to the required analysis types and analysis groups under the projects-owned setIDs of SHARE, MODEL and MFG. However, other setIDs were not updated because of the risk of overwriting any changes you may have made to these user-configurable variables. You will need to analyze the system-defined analysis types and analysis groups found under the SHARE setID and determine which additions or changes to migrate to any other setID that you use for projects processing.

Access these tables, using the navigation shown, to perform further analysis:

- Projects Analysis Groups – PS_PROJ_AN_GRP_TBL: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Groups.
- Projects Analysis Types – PS_PROJ_ANTYPE_TBL: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Types.
- Projects Analysis Group Mapping – PS_PROJ_AN_GRP_MAP: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Groups.

Properties

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

Task 6-29-2: Running Summary Refresh

To clear out any anomalous data that may be present in your system and to make sure the flexible analysis works correctly, you must run a full refresh on the summary tables.

To run summary refresh:

1. Select Project Costing, Utilities, Refresh Summary Tables.

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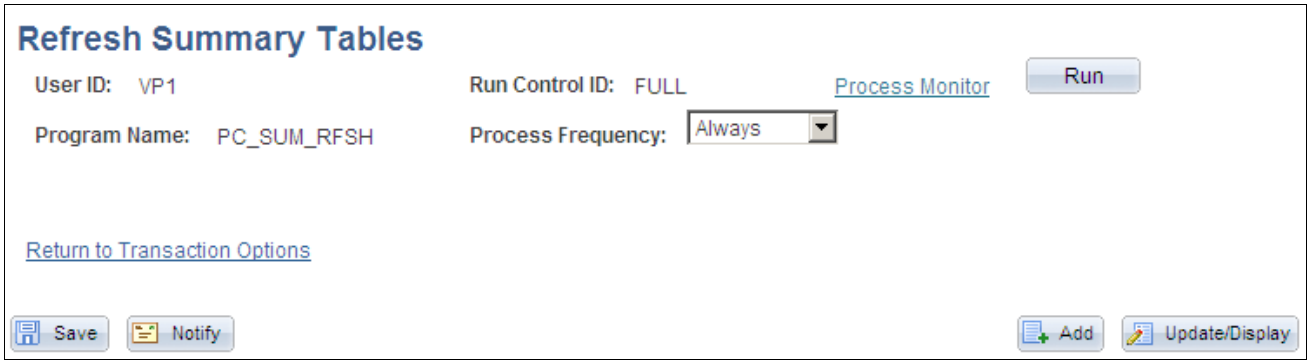
2. Add a new run control ID, or use an existing one.

   This example shows the Refresh Summary Tables page:



   Refresh Summary Tables page

3. Click Run.

Properties

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

Task 6-29-3: Entering the Funds Distribution Threshold Amount

Understanding Threshold Amounts

As of PeopleSoft FSCM 9.1, Funds Distribution Rules have an associated threshold amount. The threshold amount on all existing Funds Distribution Rules was set to zero (0) during the upgrade. If your organization uses Funds Distribution, the threshold amount will need to be updated manually to a valid threshold value.

Determining Funds Distribution Rules

To determine whether there are any existing Funds Distribution Rules in your system:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following query:

   ```
   UPG_PCZ01
   ```

3. If the query returned no rows, you can skip the remainder this step.

   If the query returned rows, complete this step.

Entering the Threshold Amount

For each Funds Distribution Rule returned by the query that you just ran in the previous step, you need to enter a threshold amount.

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To enter the threshold amount:

1. Select Project Costing, Funds Distribution, Funds Distribution.
2. Access the rule for the business unit, project, and activity from the query.
3. Click the Target Link on the Funds Distribution Source page.

   The Funds Distribution Target page appears.
4. Enter the appropriate threshold amount for the rule.

   Keep in mind that if you already have some distributed amounts against this rule, you will want the threshold amount to reflect the remaining threshold for this rule.
5. Repeat steps 2 through 4 for each Funds Distribution Rule returned by the query.

Properties

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

Task 6-29-4: Creating a Project Compression Template

Understanding Project Compression Templates

The Project Compression utility has been enhanced as of PeopleSoft FSCM 9.1 to allow you to determine the level of compression. This task involves creating a compression template for the level of compression that you want to achieve and then updating your project compression run control.

If you have never used the Project Compression utility, you can skip this task.

Creating a New Project Compression Template

To create a new Project Compression template:

1. Select Set Up Financials/Supply Chain, Product Related, Project Costing, General Options, Project Compression Template.
2. Create a new template by selecting the fields that you want to retain after the Project Costing data has been summarized.

Updating Project Compression Run Controls

To update your Project Compression run controls:

1. Select Project Costing, Utilities, Compress Project Data.
2. Select a Project Compression run control.
3. Enter the name of the compression template that you created earlier.

   Compression Template is now a required field on the run control.
4. Save your updated run control.

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5. Repeat steps 2 through 4 for each Project Compression run control.

Properties

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

Task 6-30: Setting Resource Management

This section discusses:

- Understanding Setting Resource Management
- Loading Holidays

Understanding Setting Resource Management

If you do not license Oracle's PeopleSoft Resource Management, you can skip this task.

Note. To complete this task, you need to use PeopleSoft Pure Internet Architecture. If you do not have your PeopleSoft Pure Internet Architecture environment established for this upgrade pass, the task can be postponed until you have established your PeopleSoft Pure Internet Architecture environment. You will need to complete this task for your functional testing as well as the Move to Production pass.

Task 6-30-1: Loading Holidays

In earlier releases of PeopleSoft Resource Management, when the holidays process ran it created holiday entries in the resource calendar with a TASK_TYPE of *HOLIDAY*. In the new release a new TASK_TYPE of *SCHEDULED_HOLIDAY* has been introduced. You must run the Load Holidays process at the end of the upgrade to properly assign holidays to the correct task category.

This step deletes all calendar entries where the task type is set to *HOLIDAY* for the future date and creates new entries in the calendar with new task type as *SCHEDULED_HOLIDAY*.

To run the Load Holiday process:

1. Select Set Up Financials/Supply Chain, Common Definitions, Resources Data, Load Holidays.
2. Add a new run control ID.
3. Click Save.
4. Click the Run button to access the Process Scheduler Request page.
5. Select the appropriate server name and click OK to run the process.
6. Check the Process Monitor to verify that the process ran to completion.

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Properties

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

Task 6-31: Completing Staffing Front Office Setup

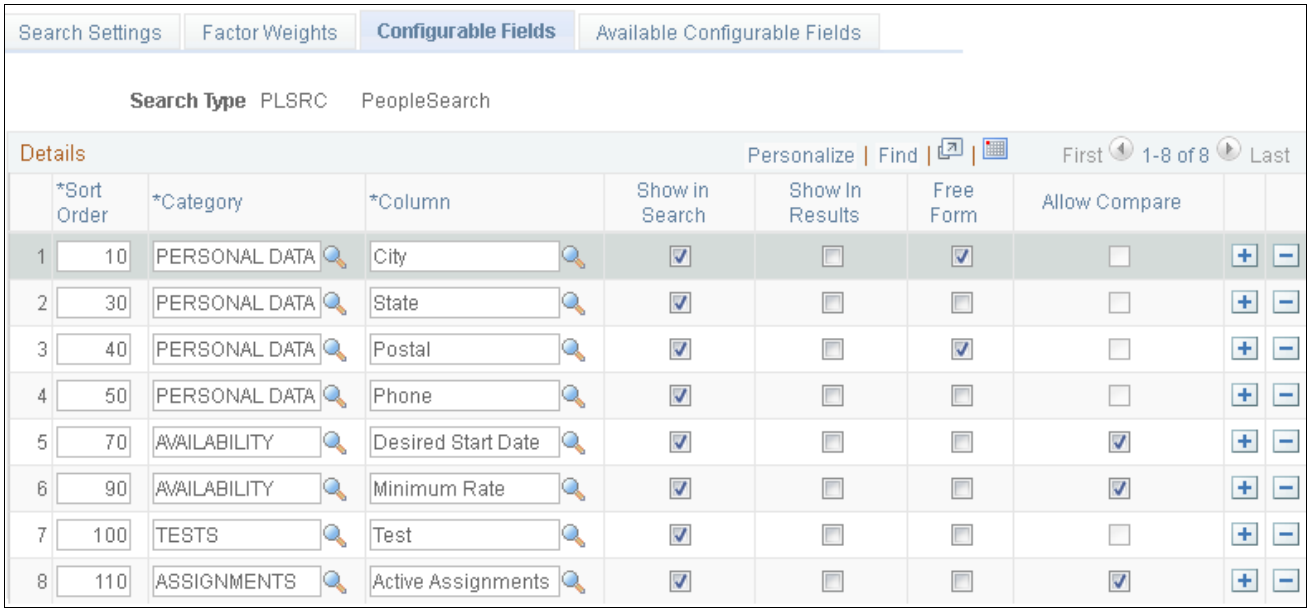
It is important to verify PeopleSoft Staffing Front Office search configurations after the upgrade and reapply any customizations that you may have had prior to the upgrade.

Note. Complete this task only if you license PeopleSoft Staffing Front Office. If you do not have PeopleSoft Staffing Front Office, you can skip this task.

To review search configurations:

1. Select Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration.
2. Select any configuration that needs to be reviewed.

   The following example shows the Configurable Fields page.



Configurable Fields page

3. If you have added or changed any column values on the Configurable Fields page that don't exist in the delivered system data configuration, configure them for Oracle Secure Enterprise Search (SES) in the PeopleSoft Search Framework as follows:

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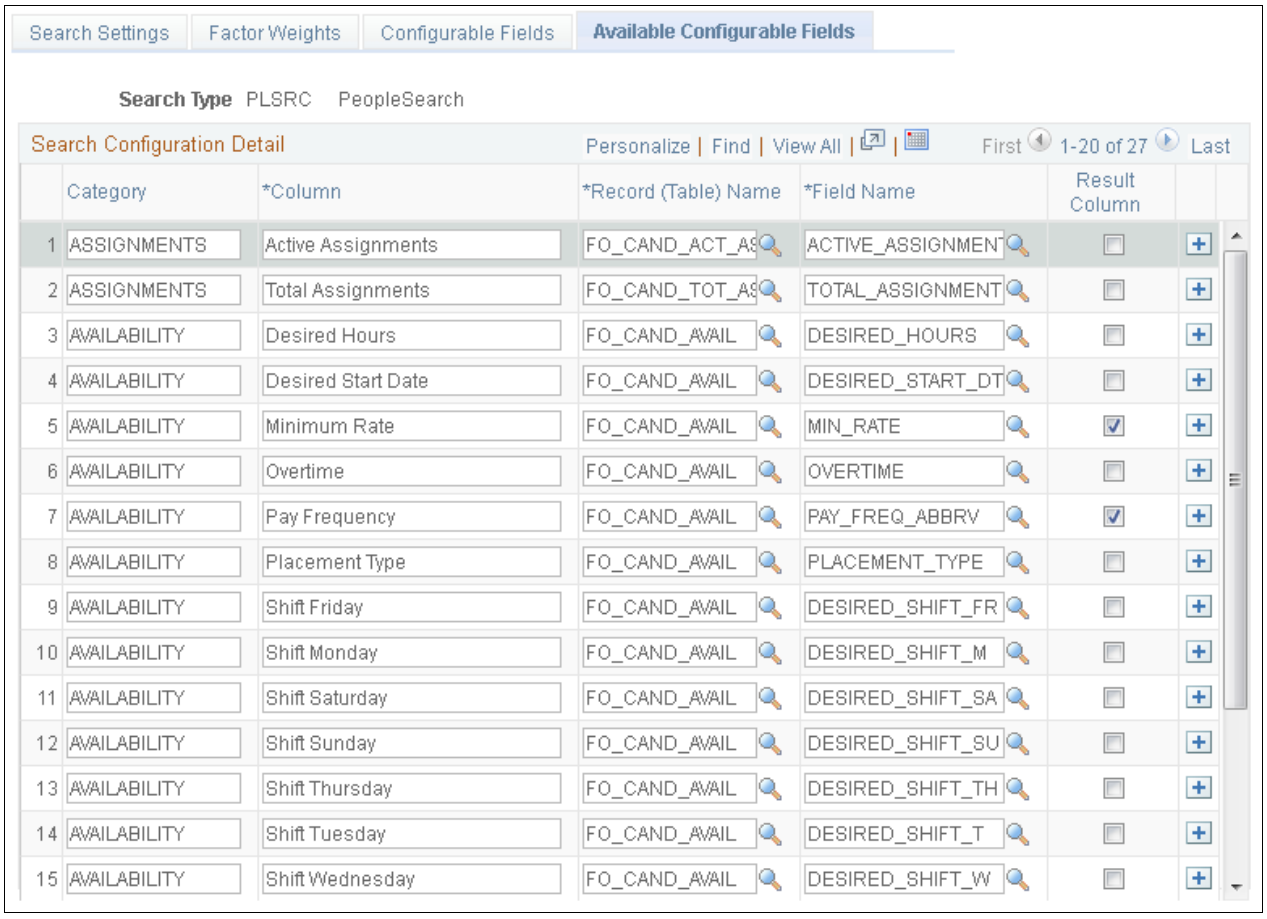
a. If the column already exists on the Available Configurable Fields page as delivered system data, enable the corresponding search attribute on the search definition and redeploy it.

The following example shows the Available Configurable Fields page.



Available Configurable Fields page

b. If you have added a new column to the delivered system data on the Available Configurable Fields page, first modify or create a new query, then attach any new queries to the connected query, enable the new search attributes on the search definition, and redeploy it.

See the product documentation for PeopleTools: PeopleSoft Search Technology for your new release for information about the PeopleSoft Search Framework.

Properties

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

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Task 6-32: Performing Payables Setup

This section discusses:

- Setting Definitions Terms and Templates
- Running the Matching Process
- Verifying Procurement Withholding ChartFields
- Resaving Voucher Build Codes

Task 6-32-1: Setting Definitions Terms and Templates

In this step, you set up accounting entry templates, assigning account numbers to all templates.

The following new account types were loaded in as part of the upgrade project:

- Payables Period End Accruals
- Expense Period End Accruals

You must assign an account number for each type for *all* of your Accounting Entry templates.

To set up accounting entry templates:

1. If you need to define new accounts, select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values, ChartField Values, Account.

   Add your new accounts for each new accounting type: Payables Period End Accruals and Expense Period End Accruals.
2. To add the accounts to the templates, select Set Up Financials/Supply Chain, Common Definitions, Accounting Entry Template, Templates.
   a. Enter a setID and click Search.
   b. Select an Accounting template.

      The Accounting Entry Template page appears.
   c. Add an account and other ChartField values, if needed, to the new accounting types.

Note. You must make your changes in Correct History mode for the new account types to appear on the page.

Properties

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

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Task 6-32-2: Running the Matching Process

To view the existing vouchers that are currently in *Exception* or *Overridden* status on the Matching Workbench, you need to run the matching process against those vouchers. After you set up the match rules and document association rules, you should run the matching process to pick up all the vouchers that are currently in *Ready, Exception,* or *Overridden* status. After the matching process runs successfully, you can view vouchers on the Matching Workbench component. You must run the matching process for all the business units.

To run the matching process:

1. Select Accounts Payable, Batch Processes, Vouchers, Matching.
2. Add a new run control.
3. Enter a description.
4. Set the Match action to *Matching.*
5. From the Options drop-down list box, select *All Business Units.*

Properties

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

Task 6-32-3: Verifying Procurement Withholding ChartFields

During the upgrade, new setup tables were populated as a result of enhancements to Withholding/1099. The data that populated the tables came from the Withhold Entity page. You must check the Withholding ChartFields defined under the Procurement Control to ensure that the tableset sharing is the same. If it is not, then you must return to Procurement Control and change the ChartField.

To verify the Withholding ChartFields for a business unit:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Procurement, Procurement Control.
2. Select the business unit.
3. Click Search or Enter.

   The General Controls page appears.
4. Select the Withholding tab.
5. Select the ChartFields link for each entity.

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Properties

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

Task 6-32-4: Resaving Voucher Build Codes

In this step, you regenerate the fields VCHR_BLD_RECV.BLD_CLAUSE1 and VCHR_BLD_RECV.BLD_CLAUSE_LONG.

To resave the voucher build codes:

1. Run the SQL command below in order to list the voucher build codes that need to be resaved.

```
SELECT VBC.SETID, VBC.VCHR_BLD_CODE
FROM PS_VCHR_BLD_CODE VBC
WHERE EXISTS (SELECT 'X'
        FROM PS_VCHR_BLD_RECV RECV
        WHERE RECV.SETID=VBC.SETID
        AND RECV.VCHR_BLD_CODE=VBC.VCHR_BLD_CODE
        AND RECV.RECV_DOC_REF_OPT='P')
```

   An example is shown below:

```
SETID VCHR_BLD_CODE
----- -------------
SHARE REC/PO
SHARE RECV
```

   Voucher Build Codes Example

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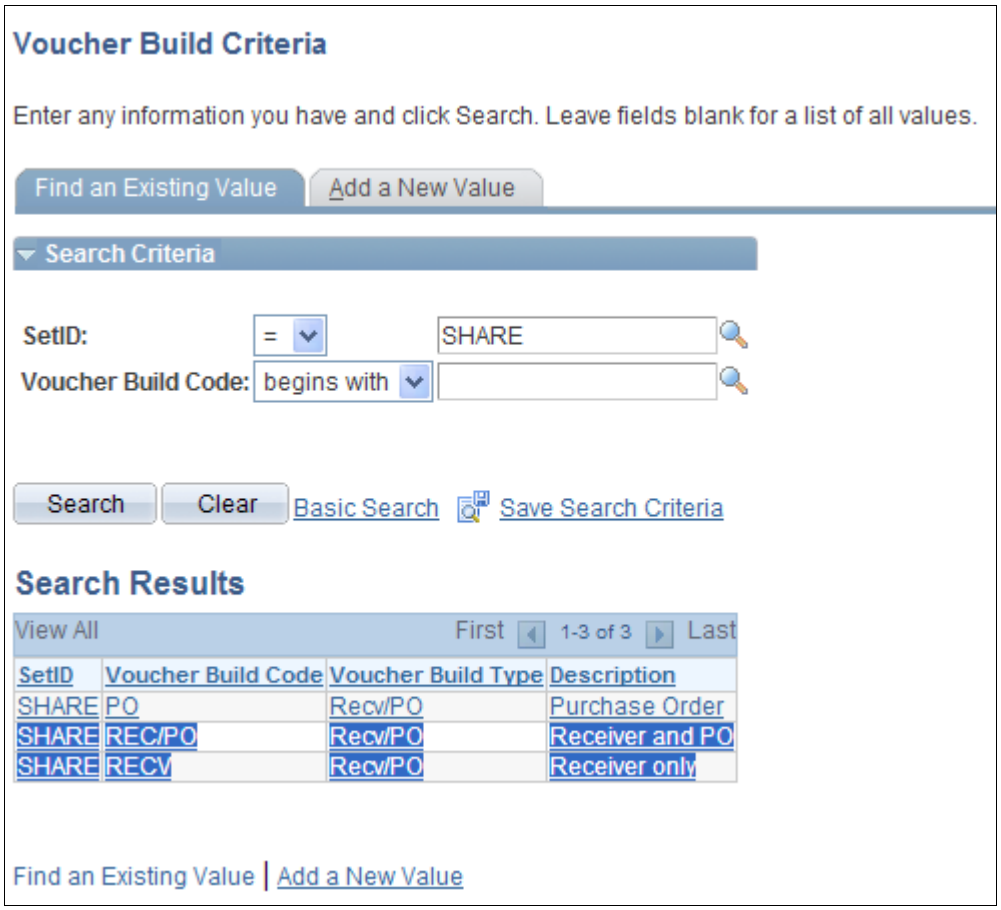
2. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Voucher Build Criteria.

   The Voucher Build Criteria search page appears.



Voucher Build Criteria search page

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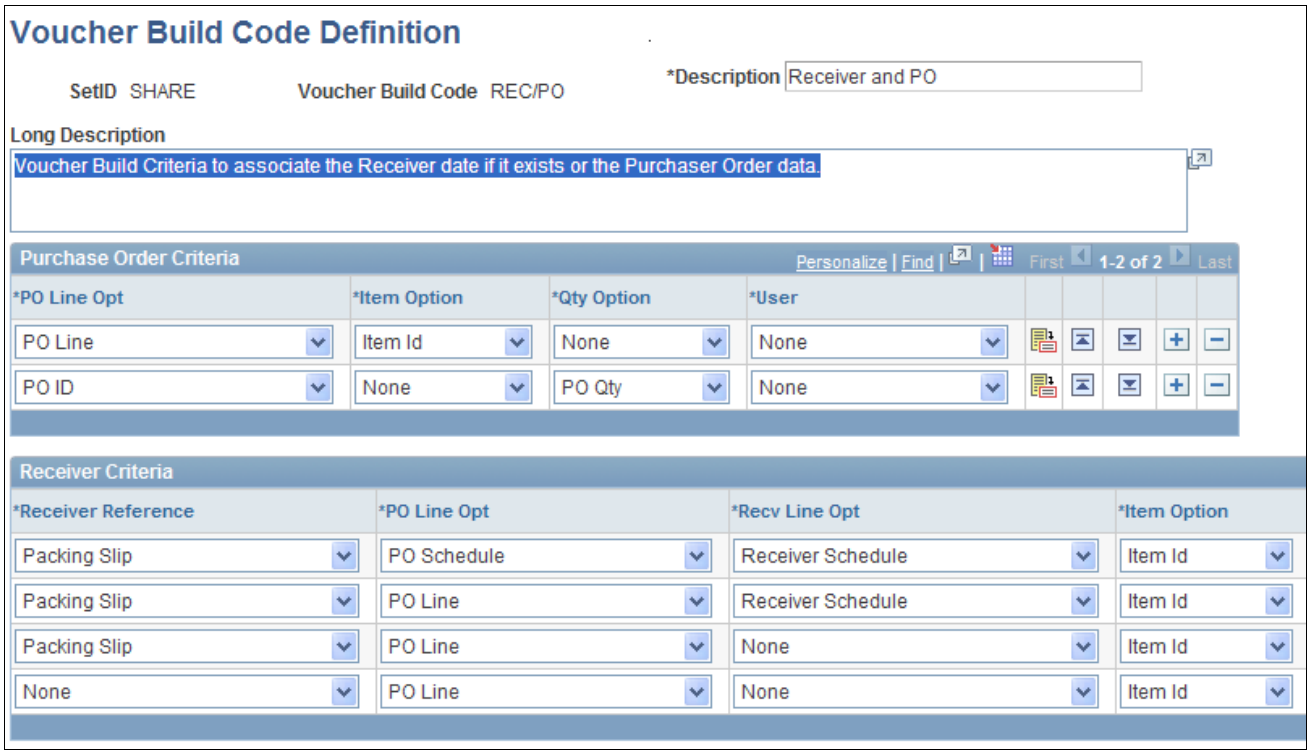
3. Enter the SetID and Voucher Build Code for one of the voucher build codes on the list generated in step 1, click Search, and open the Voucher Build Code Definition.

   An example of the Voucher Build Code Definition page is shown below.



Voucher Build Code Definition

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

---

4. Change something in the Long Description field.
5. Save the page.
6. Repeat steps 3 through 5 for each voucher build code listed in step 1.

Properties

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

Task 6-33: Completing Receivables Changes

This section discusses:

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- Running the Customer Follow-Up Query
- Adding a Cash Control Journal Generator Template
- Updating Existing Conversations

Note. If you do not have PeopleSoft Receivables, you can skip this task.

Task 6-33-1: Running the Customer Follow-Up Query

The new customer conversation functionality requires you to provide a business unit when creating follow-up letters. In this step, you run a query to determine which operators need to update their existing run controls for conversation follow-up letters. The query should be used to notify users that they should update the run control with the business units that they need to process when creating follow-up letters. As the cleanup effort continues, the query can be run as needed to identify which operators and run controls have not been updated.

To run the UPG_ARU10 query:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following query:

   `UPG_ARU10`

Properties

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

Task 6-33-2: Adding a Cash Control Journal Generator Template

If you are a PeopleSoft Receivables customer running Cash Clearing, a new journal generator template must be created in order to journalize cash clearing entries. For information on how to set up a journal generator template, see the reference below. A cash clearing template for PeopleSoft Receivables is delivered in demo data and can be referred to when setting up the new journal generator template.

See the product documentation for PeopleSoft FSCM: Receivables for your new release.

Properties

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

Task 6-33-3: Updating Existing Conversations

In the new release, customer conversations have been enhanced to group conversations by business unit. This allows AR Receivable specialists to create follow-up letters by business unit.

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Earlier in the upgrade, all existing conversations with follow-up letters were created. If there is a need to create a follow-up letter from an existing conversation, a business unit value *must* be entered on the conversation before creating the letter. When the business unit field is saved, it is automatically populated with the user's default business unit that appears on the User Preferences page. If the user's default business unit is different than the business unit of the customer conversation, you can update the User Preferences page with the correct business unit.

To update the default business unit for an operator:

1. Select Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences.
2. Select the user that will access the conversation.
3. Select the Overall Preferences link.
4. Select the business unit to be entered on the conversation.
5. Save the page.

To update an existing conversation:

1. Select Customers, Conversations, Update Conversations.
2. Select a customer conversation.
3. Change the status to *Open.*
4. Save the page.

Note. In the new PeopleSoft FSCM release, all conversations require a contact ID. Conversations that are updated will require you to select a contact ID for the conversation. Click the Edit Entry button on the Conversation Entries scroll to select a valid contact ID.

---

5. After the conversation has been updated with the correct business unit, the default business unit on the User Preferences page can be changed back to its original value.
6. If this procedure cannot be implemented, you can update the conversation records with a SQL script.

   For a reference, the following records should be updated with the desired business unit value:

   ```
   CUST_CONVER.BUSINESS_UNIT

   CUST_CONVER_LNG.BUSINESS_UNIT

   CUST_CONVER_ATT.BUSINESS_UNIT

   CUST_CONVER_DTL.BUSINESS_UNIT

   CUST_CONVER_HDR.BUSINESS_UNIT

   CUS_CNV_HDR_LNG.BUSINESS_UNIT
   ```

Properties

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

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Task 6-34: Updating eSettlements

This section discusses:

- Validating Buyer Registration
- Validating Agreement Registration

Task 6-34-1: Validating Buyer Registration

Follow the steps in the procedure below to validate the buyer registration payment method assignment.

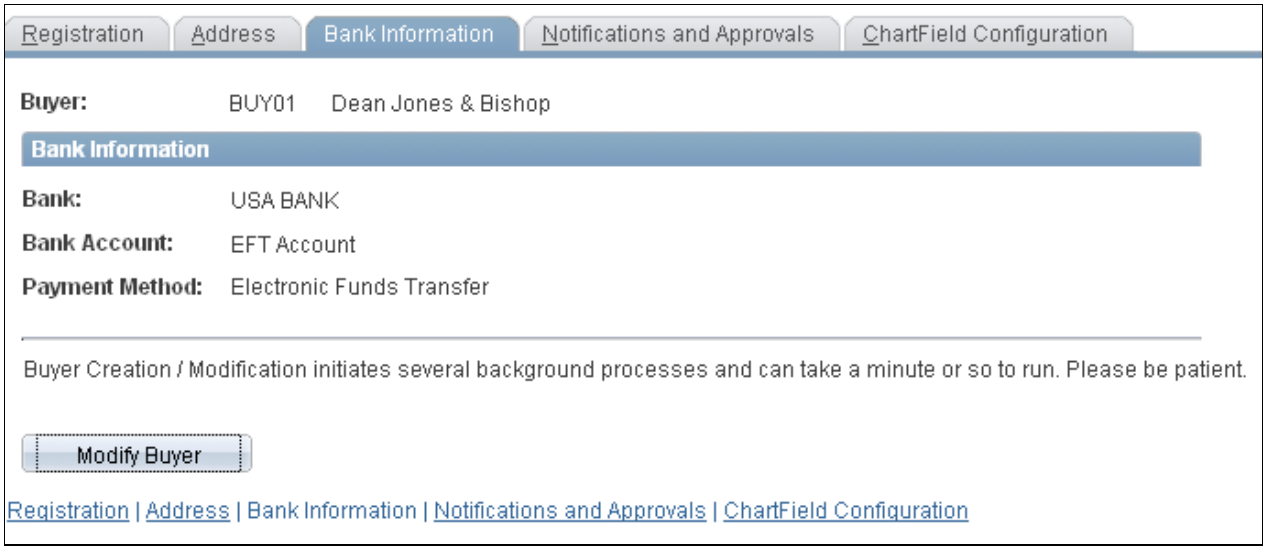
To validate the buyer registration payment method assignment:

1. Select eSettlements, Buyer Information, Review Buyer Details.
2. Select the buyer that you want to review.
3. Review the bank data on the Bank Information tab and ensure that the payment method is correct.
4. If the payment method of the Bank Information tab needs to be corrected, then in the BSP model, select the correct payment method on the Buyer Information page, Bank Information tab. In the BD model, navigate to the Payables Business Unit Options, for the buyer, and select the correct payment method on the Payment Options page.
5. If the payment method value that you want does not appear in the drop-down list box, then the payment method is not valid for this particular bank account.

   To address this problem, follow these steps:

   a. Go to the bank setup pages and add the desired payment method to the bank account.

   b. Return to the Bank Information tab and assign the new payment method to the buyer.



Buyer Information page: Bank Information tab

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Properties

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

Task 6-34-2: Validating Agreement Registration

In this step, you review and validate the buyer Agreement Registration payment method assignment.

To validate the Agreement Registration payment method assignment:

1. Select eSettlements, Buyer Information, Review Agreement Details.
2. Select the agreement that you want to review.

   Note. The user profile of your current user ID must have the Buyer Administration Role type assigned to one of its roles and the proper security for all buyers to access agreements.

3. Review the bank data on the Buyer tab and ensure that the payment method is correct.
4. If the payment method is not correct, correct the payment method now.
5. If the payment method value that you want does not show up in the drop-down list box, then the payment method is not valid for this particular bank account.

   To address this problem, follow these steps:

   a. Go to the bank setup pages and add the desired payment method to the bank account.

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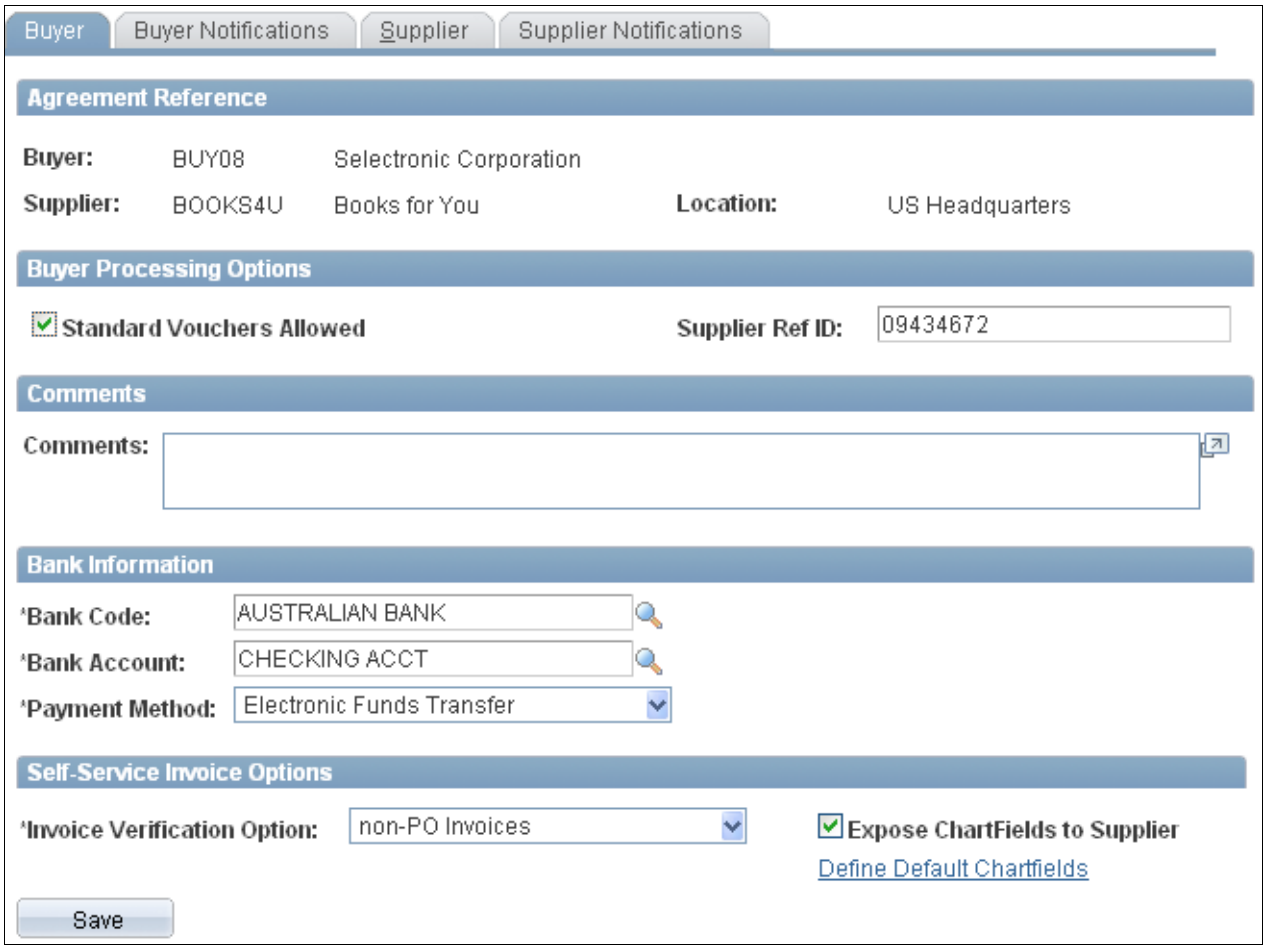
b. Return to the Buyer tab and assign the new payment method to the buyer.



Buyer Information page: Buyer tab

See the product documentation for PeopleSoft FSCM: eSettlements for your new release.

Properties

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

Task 6-35: Updating the General Ledger

This section discusses:

- Understanding the General Ledger
- Defining Closing Process Groups

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Understanding the General Ledger

This task assists you in updating PeopleSoft General Ledger. If you have not licensed PeopleSoft General Ledger, you can skip this task.

Task 6-35-1: Defining Closing Process Groups

This section discusses:

- Understanding Closing Process Groups
- Assigning Closing Rules to Closing Process Groups
- Combining Closing Rules in a Closing Process Group

Understanding Closing Process Groups

In the new release, closing process groups were introduced to facilitate closing for some countries that require additional steps and entries. You need to create a closing process group for each closing rule or combination of existing closing rules. If you do not need to combine closing rules, follow the steps in Assigning Closing Rules to Closing Process Groups. If you want to combine closing rules in a process closing group, follow the steps in Combining Closing Rules in a Closing Process Group.

Assigning Closing Rules to Closing Process Groups

To assign closing rules to closing process groups without combining closing rules:

1. Select General Ledger, Close Ledgers, Closing Rules.
2. Select one of your existing closing rules.
3. In the Closing Options tab, click the Create Closing Group link.
4. Enter the closing group name.
5. Repeat steps 1 through 4 until all active closing rules have been assigned to a closing process group.

Combining Closing Rules in a Closing Process Group

To combine closing rules in a process closing group:

1. Select General Ledger, Close Ledgers, Closing Process Group.
2. Add a new closing process group.
3. Enter the closing rules in the Closing Group Steps grid.
4. Repeat steps 1 through 3 until all active closing rules have been assigned to a closing process group.

Properties

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

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Task 6-36: Completing Asset Management Setup

This section discusses:

- Applying Customizations to Business Rules
- Applying Customizations to Common Search Configurations
- Running Compare Asset Repositories Process
- Finding the URL for File Attachments
- Setting Up File Attachment Administration
- Running the File Attachment Conversion

Task 6-36-1: Applying Customizations to Business Rules

In this PeopleSoft FSCM release, business rules and associated attributes are modified. Before using the system after the upgrade, it is important that you verify that the business rules upgraded correctly and reapply any customizations that were present before the upgrade.

Note. Complete this task *only* if you license Oracle's PeopleSoft IT Asset Management. If you do not have PeopleSoft IT Asset Management, you can skip this task.

To review PeopleSoft IT Asset Management Business Rules:

1. Select Set Up Financials/Supply Chain, Product Related, IT Asset Management, Business Rules.
2. Select Search.

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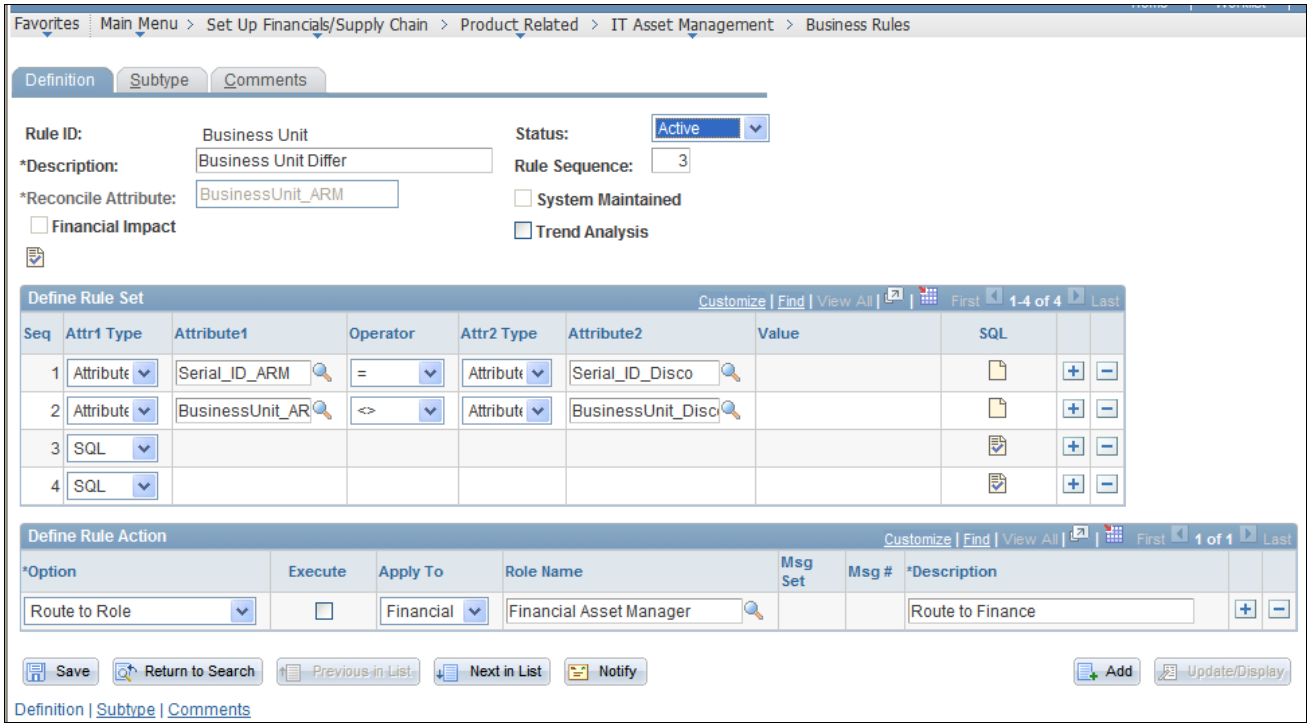
3. Select the business rule that needs to be reviewed.

   The following example shows the Business Rule page, Definition tab.



Business Rule page: Definition tab

4. Verify the value in the Apply To field in the Define Rule Action section.

   Make any necessary modifications, based on the business rule logic.

5. Save the business rule.

Properties

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

Task 6-36-2: Applying Customizations to Common Search Configurations

It is important to verify the Common Search Configurations after the upgrade, and reapply any customizations you may have had prior to the upgrade.

Note. Complete this task *only* if you license Oracle's PeopleSoft IT Asset Management. If you do not have PeopleSoft IT Asset Management, you can skip this task.

To review PeopleSoft IT Asset Management Common Search Configuration:

1. Select Set Up Financials/Supply Chain, Product Related, IT Asset Management, Common Search Configuration.

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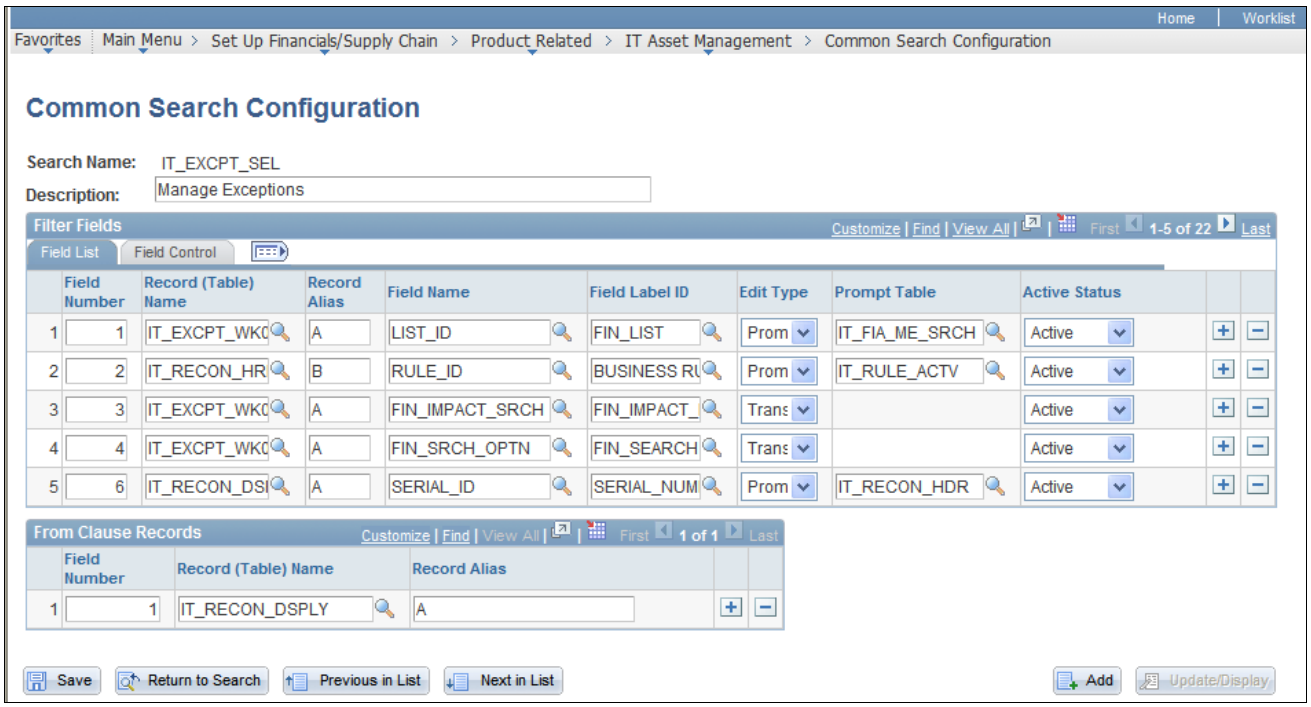
2. Select Search.
3. Select any configuration that needs to be reviewed.

   The following example shows the Common Search Configuration page.



Common Search Configuration page

Properties

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

Task 6-36-3: Running Compare Asset Repositories Process

You must run the Compare Asset Repositories process at this time. This populates PeopleSoft IT Asset Management Exception tables.

Note. Complete this task *only* if you license Oracle's PeopleSoft IT Asset Management. If you do not have PeopleSoft IT Asset Management, you can skip this task.

To run Compare Asset Repositories Process:

1. Select IT Asset Management, Asset Discovery and Validation, Compare Asset Repositories.

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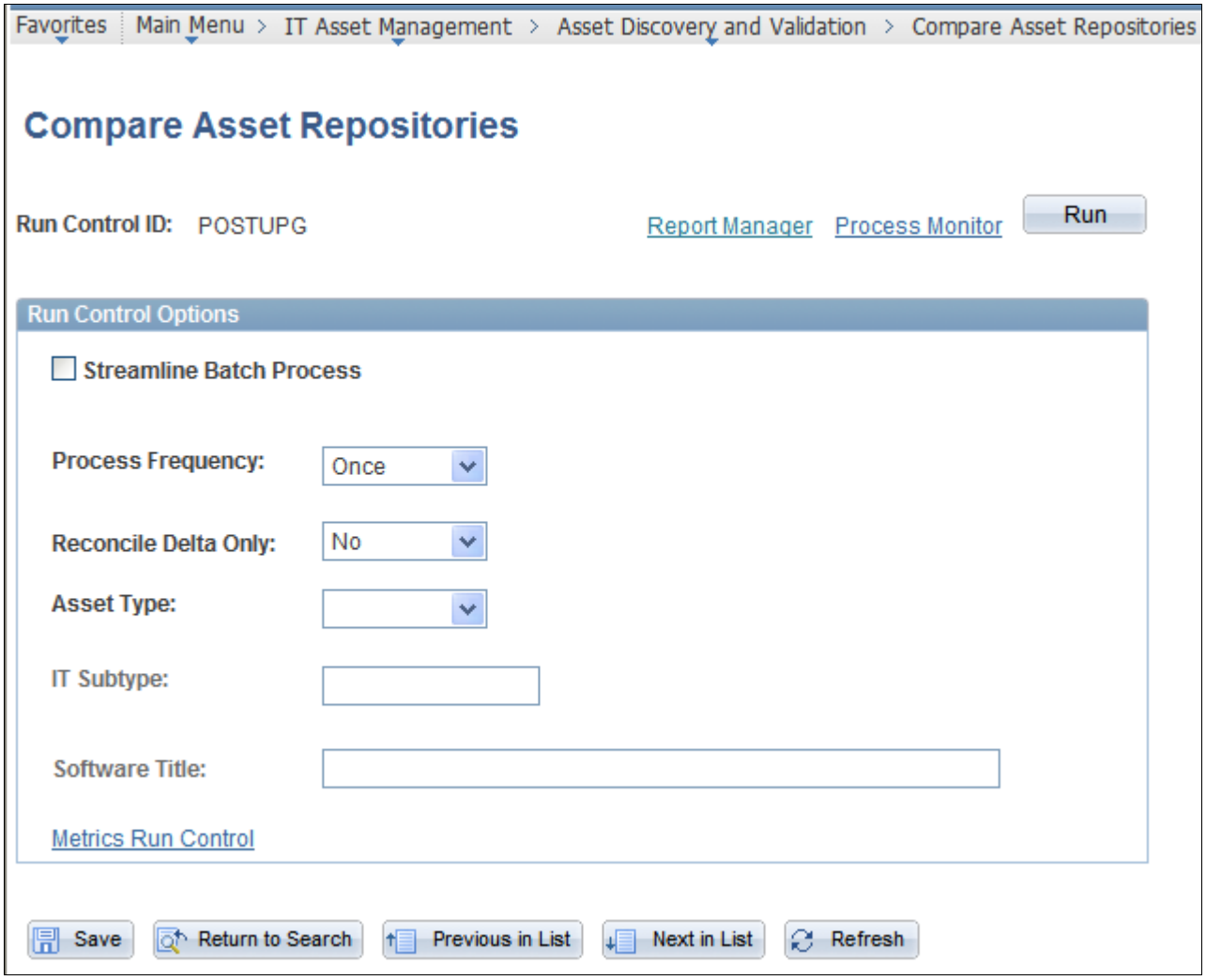
2. Create a new run control ID

   The following example shows the Compare Asset Repositories page.



Compare Asset Repositories page

3. Set the Process Frequency field to *Once.*
4. Set the Reconcile Delta Only field to *No.*
5. Leave the rest of the parameters blank.
6. Click Run.

Properties

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

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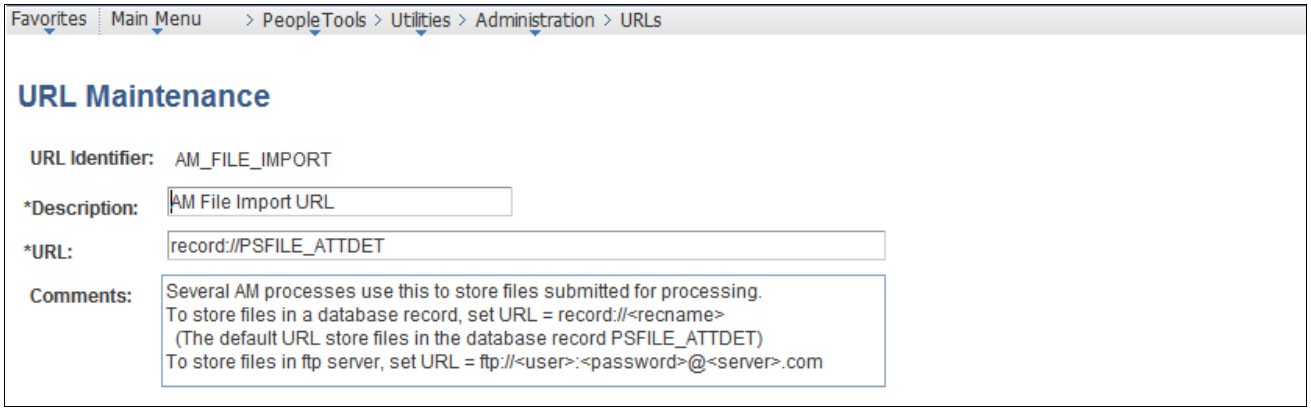
Task 6-36-4: Finding the URL for File Attachments

As of PeopleSoft FSCM 9.1, the PeopleSoft Financial Management implementation of attachment functionality is based on a new architecture, different from the structure used in the PeopleSoft Asset Management file attachment feature in PeopleSoft FSCM 9.0. To migrate the PeopleSoft FSCM 9.0 Asset Management structure to this new architecture, you will need to complete this step and the next two steps, Setting Up File Attachment Administration and Running the File Attachment Conversion.

To determine where current PeopleSoft Asset Management file attachments are stored:

1. Select Peopletools, Utilities, Adminstration, URLs.
2. Select *AM_FILE_IMPORT* from the list of URL identifiers.

   The URL Maintenance page appears.



URL Maintenance page

3. Take note of the URL.

   In the example above, the URL is PSFILE_ATTDET.

Properties

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

Task 6-36-5: Setting Up File Attachment Administration

In this step, you set up PeopleSoft Asset Management file attachment administration by adding the URL information, if it does not already exist.

To set up file attachment administration:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.

   The Administer File Attachment page appears.

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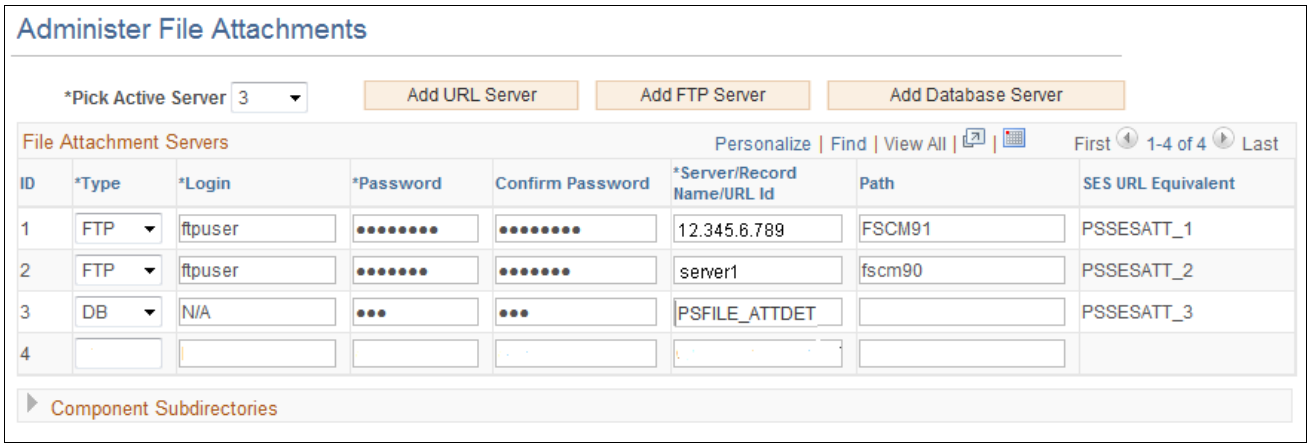
2. If the URL is not yet listed on the server list, add the URL for the database server or the FTP server.

   For the example in the previous step "Finding the URL for File Attachments," you would add the URL PSFILE_ATTDET, as shown below:



Administer File Attachments page

3. Click Save.

Properties

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

Task 6-36-6: Running the File Attachment Conversion

In this step, you run a conversion program to update the new PeopleSoft Asset Management file attachment record structure.

To run the conversion:

1. Select Set Up Financials/Supply Chain, Upgrade, Run AM Attachment Post Upgrade.
2. Enter a run control ID.

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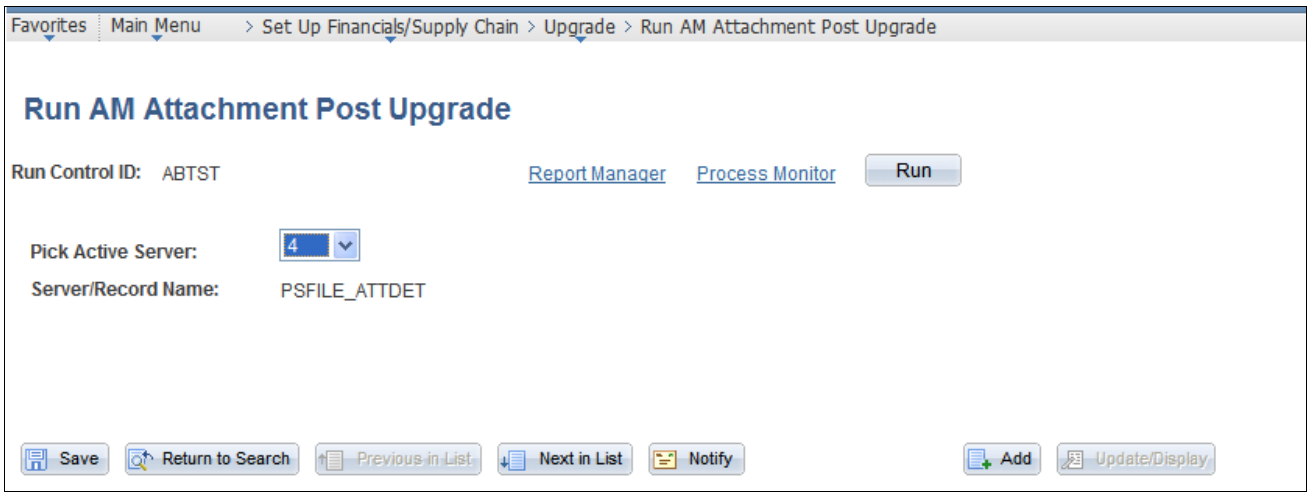
3. Select the server that is entered on the Administer File Attachments page as the Active Server.
   See Setting Up File Attachment Administration.
   The following example shows the Run AM Attachments Post Upgrade page.



Run AM Attachment Post Upgrade

4. Click Run to run the process.
5. Verify that attachments can be accessed.
   You should be able to access attachments from the General Information section on the Basic Add page.

Properties

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

Task 6-37: Completing Expenses Setup

This section discusses:

- Understanding Completing Expenses Setup
- Setting Up Employee Privilege Templates
- Attaching Employee Privilege Templates

Understanding Completing Expenses Setup

In this task, you complete the setup for Oracle's PeopleSoft Expenses using the results of the queries UPG_EXZ01 and UPG_EXZ02 that you ran before you began the upgrade in the chapter "Preparing Your Database for Upgrade," Preparing Expenses task. Now that the upgrade is complete, you set up employee privilege templates for each expense transaction type and then associate the templates with either business units or roles.

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Task 6-37-1: Setting Up Employee Privilege Templates

This section discusses:

- Understanding Employee Privilege Template Setup
- Setting Up the Templates to Allow Updates
- Setting Up the Templates for View
- Setting Up Templates for Hide

Understanding Employee Privilege Template Setup

You need to set up employee privilege templates for each expense transaction according to the type of accounting display that was set up. The three options for accounting display in previous releases were Update, Display Only, and Hide.

Note. If the accounting display field was updated and you do not want to make any changes to it, then you do not need to set up employee privilege templates. The system, as delivered, will default to users having the ability to access and update accounting information on the expense transactions.

For more complete information on setting up employee privilege templates, see the product documentation for PeopleSoft FSCM: Expenses for your new release.

Setting Up the Templates to Allow Updates

To set up the templates to allow updates to the accounting display:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Employee Privilege Template.
2. Select the transaction type Expense Report.

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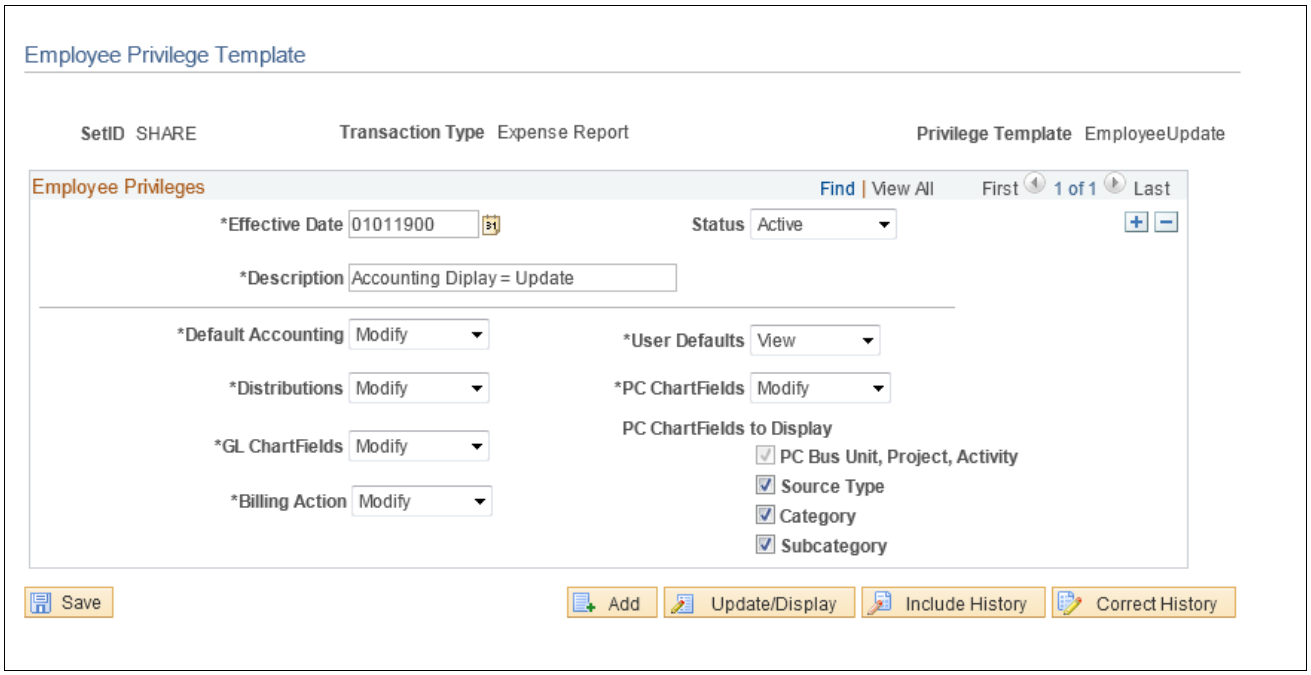
3. Set the Default Accounting, Distributions, GL ChartFields, and PC ChartFields fields to *Modify* and click Save.

   The following example shows the Employee Privilege Template page.



Employee Privilege Template: Accounting Display=Update

4. Repeat steps 1 through 3 to create privilege templates for the Travel Authorization and Time Report transaction types.

Setting Up the Templates for View

To set up the templates for viewing the accounting display:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Employee Privilege Template.
2. Select the transaction type Expense Report.

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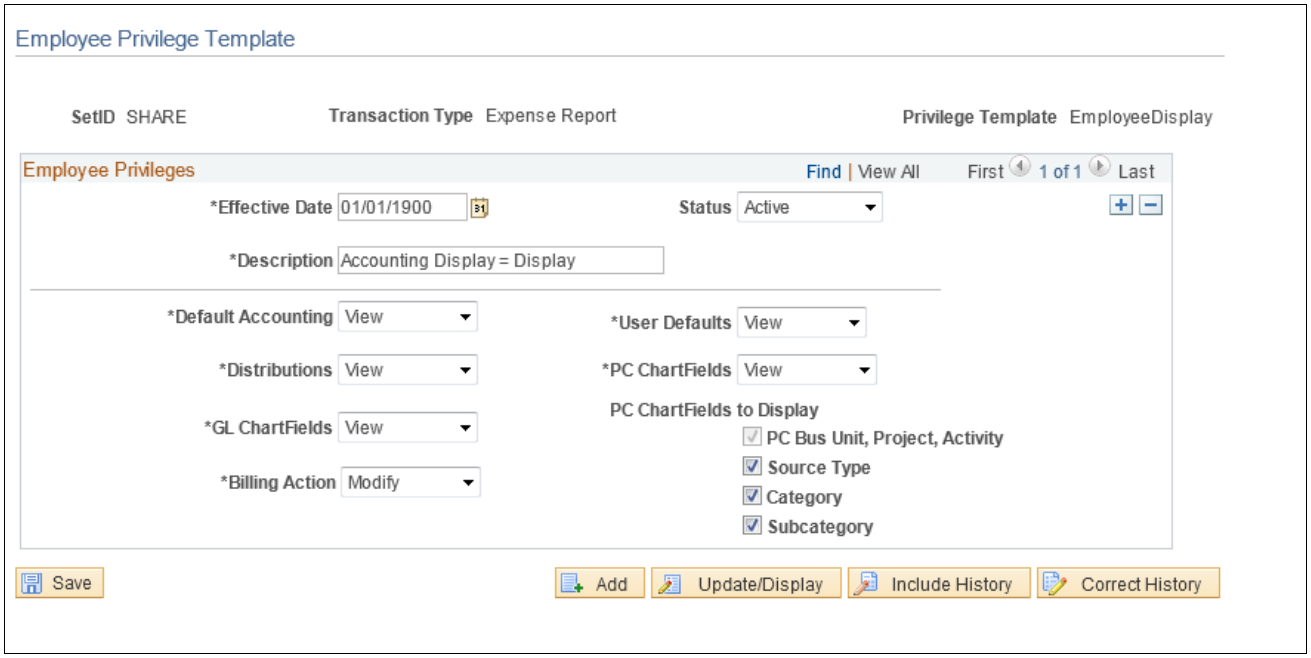
3. Set the Default Accounting, Distributions, GL ChartFields, and PC ChartFields fields to *View* and click Save.

   The following example shows the Employee Privilege Template page.



Employee Privilege Template: Accounting Display=Display

4. Repeat steps 1 through 3 to create privilege templates for the Travel Authorization and Time Report transaction types.

Setting Up Templates for Hide

To set up the templates to hide the accounting display:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Employee Privilege Template.
2. Select the transaction type Expense Report.

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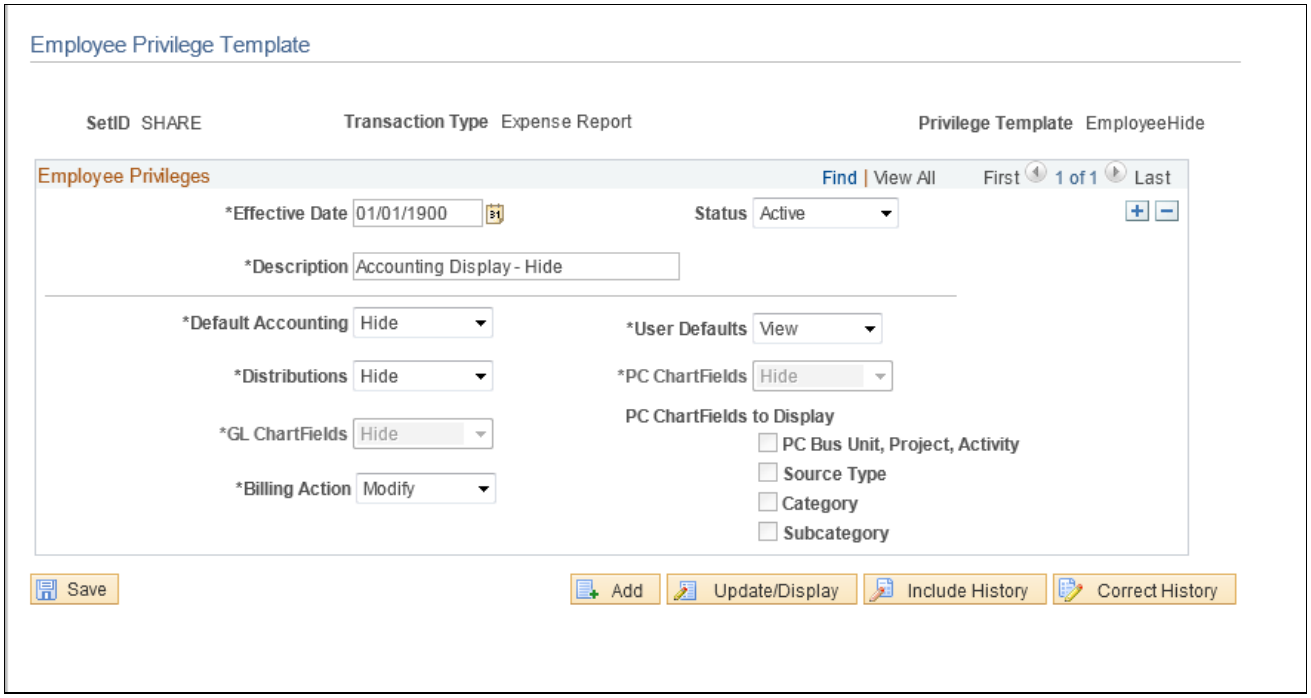
3. Set the Default Accounting and Distributions fields to *Hide* and click Save.

   The following example shows the Employee Privilege Template page.



Employee Privilege Template: Accounting Display=Hide

4. Repeat steps 1 through 3 to create privilege templates for the Travel Authorization and Time Report transaction types.

Properties

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

Task 6-37-2: Attaching Employee Privilege Templates

This section discusses:

- Understanding Attaching Employee Privilege Templates
- Attaching a Privilege Template to a Business Unit
- Attaching a Privilege Template to a Role

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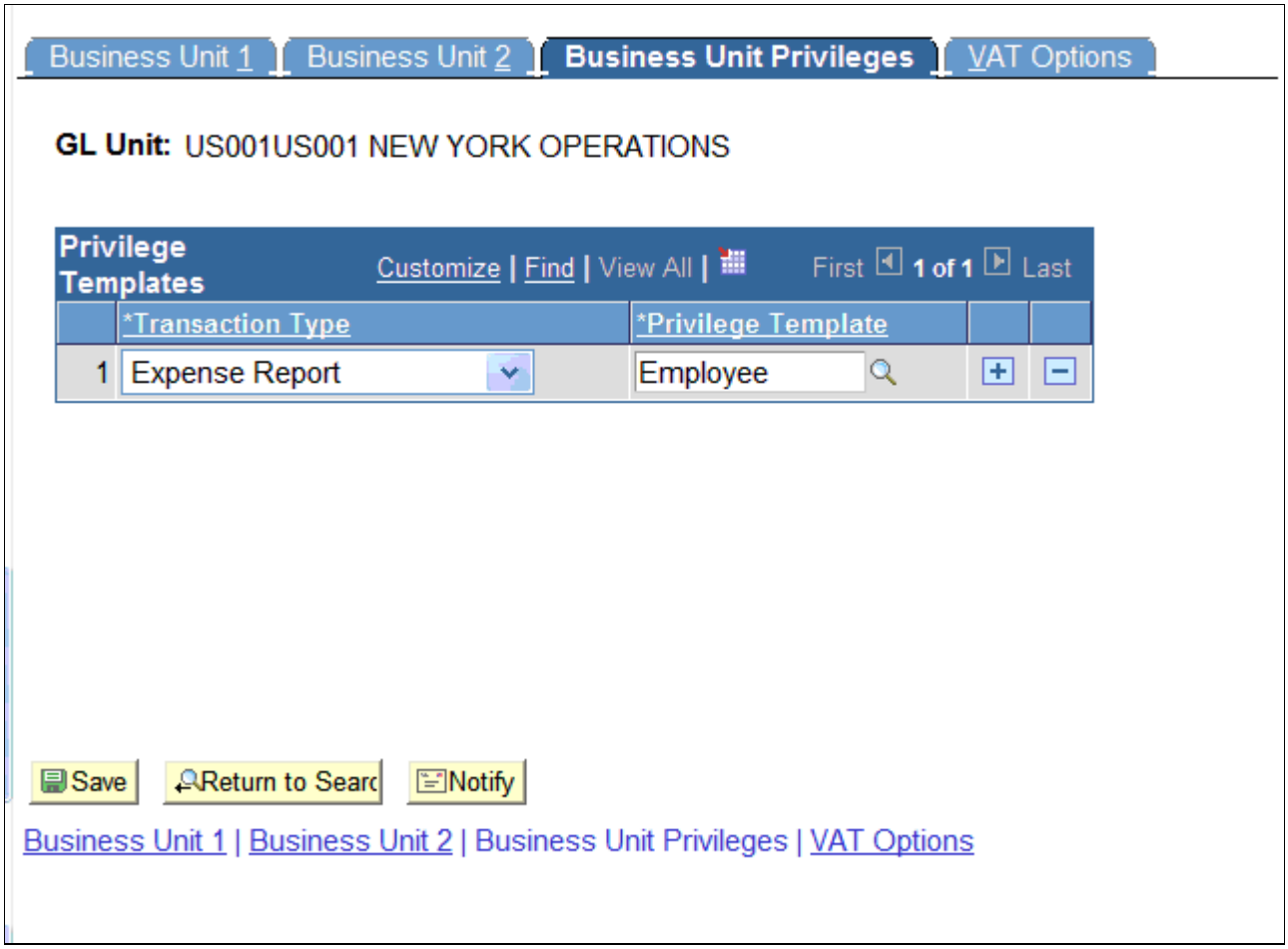
Understanding Attaching Employee Privilege Templates

You associate the employee privilege templates with a business unit or role, depending on how the accounting display was set up previously. If the accounting display was set at the business unit level, then update the Expenses business unit to point to the new employee privilege template on the Business Unit Privileges tab on the Business Unit Definition page. If the accounting display was set at the Expenses role, then update the Expenses role to point to the new employee privilege template.

Attaching a Privilege Template to a Business Unit

To attach a privilege template to a business unit:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Expenses, Expenses Definition.
2. Select a relevant business unit.
3. On the Business Unit Privileges tab, for each transaction type (Expense Report, Travel Authorization, and Time Report) select a privilege template and click Save to attach it to the business unit.



Business Unit Privileges tab

4. Repeat steps 2 and 3 for each relevant business unit.

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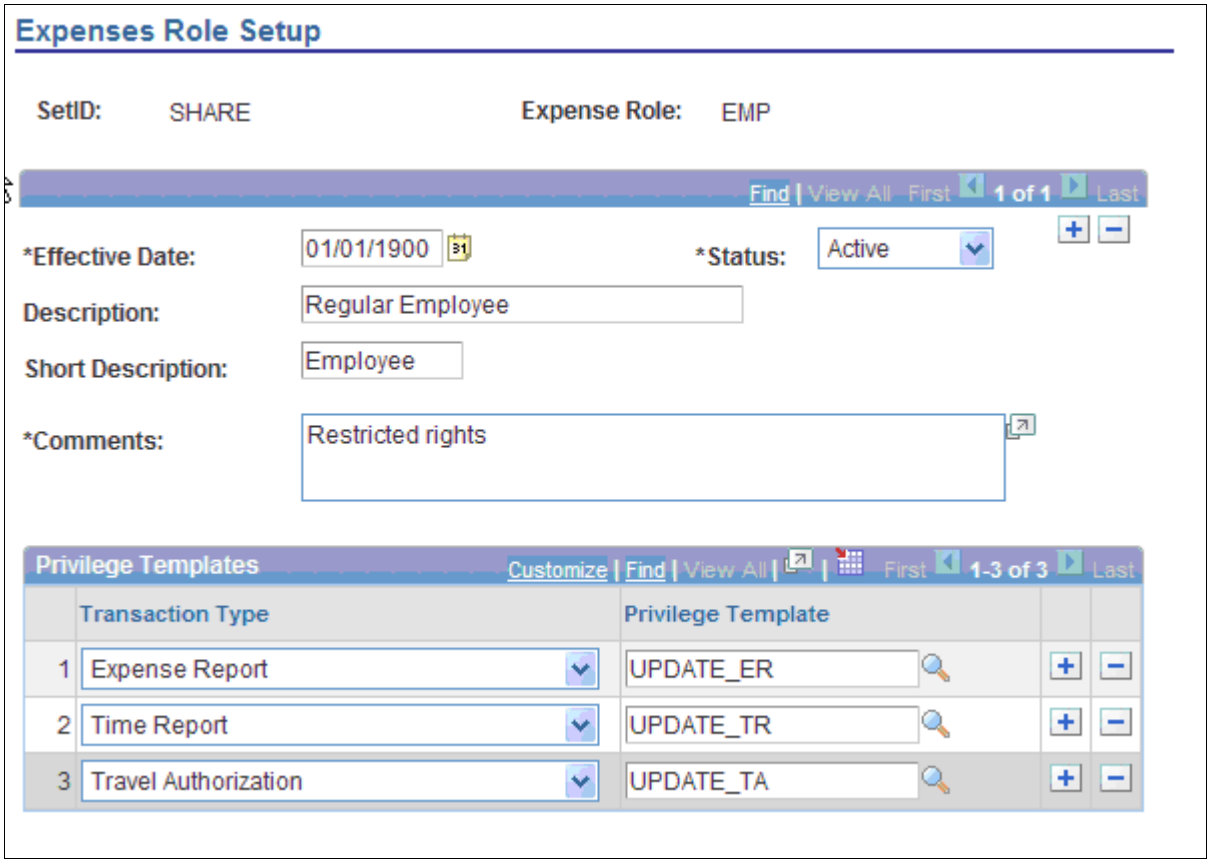
Attaching a Privilege Template to a Role

To attach a privilege template to a role:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Expense Role.
2. Select a relevant Expense role.
3. On the Expense Role Setup page, for each transaction type (Expense Report, Travel Authorization, and Time Report) select a privilege template and click Save to attach it to the role.



Expenses Role Setup page

4. Repeat steps 2 and 3 for each relevant role.

Properties

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

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Task 6-38: Setting VAT Processing

This section discusses:

- Updating VAT Entity Report Options

Task 6-38-1: Updating VAT Entity Report Options

In the new PeopleSoft FSCM release, a new VAT process has been added that allows you to create an XML file which may be submitted to HM Revenue and Customs for UK EC Sales List reporting. You run this process from the existing VAT Return and Report run control component. However, before you can run this process for any given VAT Entity, you must link the process to the VAT entity.

To link the VAT process to the VAT entity:

1. Select Set Up Financials/Supply Chain, Common Definitions, VAT and Intrastat, Value Added Tax, VAT Entity.
2. For each VAT entity registered in the UK, for the UK registration, complete the following steps:
   a. Select the VAT Report Details link.
   b. In the VAT Reports scroll area, click the plus (+) button to add a new row.
   c. For the new row, select *Application Engine* for Process Type.
   d. Select *LC_ESL_XML* for the process name.
   e. Click OK to return to the main VAT Entity page.
3. Click Save.

Properties

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

Task 6-39: Configuring Inventory

In this task you define a customer ID to be used on return to vendor (RTV) stock requests. This RTV customer ID is a placeholder that enables you to ship returned stock to your vendors without having to define each of them as customers on the customer table. When a material stock request (MSR) is created, the customer ID fields default to the RTV customer ID, the name of the vendor (from the RTV transaction) appears in the customer name fields, and the vendor address appears in the IN_DEMAND_ADDR record as an override to the stock request.

To define the default RTV customer:

1. Select Customers, Customer Information, General Information, General Info.
2. On the Customer Information-General Information page, define a new ship-to customer.

   The customer ID should be easily identified as a dummy ID for RTV, such as, RTVID.
3. Select Set Up Financials/Supply Chain, Install, Installation Options, Inventory.

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4. On the Installation Options-Inventory page, enter the customer ID that you created in step 2 in the Default RTV Customer ID field.

   If the default RTV customer ID has not been defined, an error will be displayed when you save the Express Issue transaction created against RTV in PeopleSoft Inventory.

Properties

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

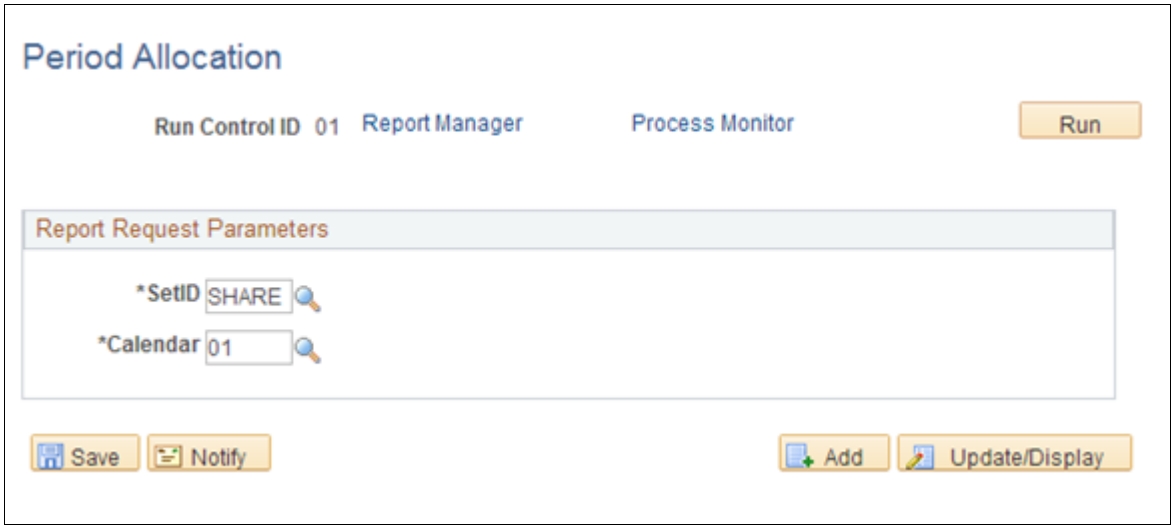
Task 6-40: Configuring Asset Management

You need to allocate periods for every calendar used for depreciation calculation. In this task, you run the period allocation process.

To run the period allocation process:

1. Select Set Up Financials/Supply Chain, Product Related, Asset Management, Depreciation, Period Allocation.
2. Add a new Run Control ID.
3. Select the appropriate setID and corresponding calendar ID.

   The following example shows the Period Allocation page:



Period Allocation page

4. Click Save and then click Run to run the process.
5. After the process runs to completion, ensure that the run status displays *Success* and the distribution status displays *Posted.*
6. Repeat steps 1 through 5 until all the calendars used in the system are processed.

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Properties

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

Task 6-41: Setting Up WorkCenters

To take advantage of the new WorkCenter functionality, you need to set up the product WorkCenter. The WorkCenters are delivered with the pagelets but with no links. You can configure the links content specifically to your needs.

You configure the WorkCenters using the components in Enterprise Components, WorkCenter/Dashboards.

For more information about setting up your WorkCenters, see the product documentation for PeopleSoft FSCM: Application Fundamentals for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Payables Receivables Billing Purchasing Inventory Contracts Staffing Front Office General Ledger Project Costing	All	All

Task 6-42: Deleting Rename Data

After completing the final Move to Production pass, delete all the data stored in the PSOBJCHNG table. Do not delete this data if you have not completed your final Move to Production pass. The application rename data stored in the PSOBJCHNG table must be deleted before starting your next PeopleTools-only upgrade. The build process looks in this table when running alter renames.

Run the following SQL on your Target database:

```
DELETE FROM PSOBJCHNG
```

Important! Perform this task only once, after you complete your final Move to Production pass.

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Properties

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

Task 6-43: 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:

   ```
   Financials/SCM, 9.20
   ```

4. The release you are upgrading to is not a service pack, therefore enter *0* in the service pack field.
5. Click Stamp.
6. Close PeopleSoft Application Designer.

Properties

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

Task 6-44: 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 on to the target database using PeopleSoft Application Designer.

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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

3. 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 6-45: 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

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Task 6-46: 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 reports, 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

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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 Move to Production passes as necessary to work out any issues and to be comfortable with the process. During each Test Move to Production pass 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 that you can plan your production downtime for your Move to Production weekend.

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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 (MTP) test pass. In the remaining steps in this task, you 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 Apply Type property to *Move to Production.* That will give you a job with the steps filtered to include only those steps that apply to the 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 in the MTP pass is the handling of SQL scripts that create and alter tables. In the initial pass, you generate and sometimes edit, then execute the SQL scripts. In the MTP pass, you may be able to skip the generation steps and use the SQL that 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, you 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 the SQL again. This can include changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.51 or 8.52), 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 the step to open the Step Properties dialog, and change the Apply Type property to *Initial Pass.* 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. Therefore, ensure that PeopleSoft Change Assistant will find the scripts when it tries to run them. The steps that are eligible for this treatment will contain Move to Production documentation notes indicating this option.

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."

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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. Create new output and staging directories.

   Oracle recommends that you use new output and staging directories for each new test pass.
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, New Environment, and enter an environment name.
4. Specify the Target database setup information.

   This is the new Copy of Production database.
5. Specify the Source database setup information and click Edit.

   This is the Copy of Production database from your previous pass.
6. Ensure that the Current Homes information reflects the new application release information and that the 'Set path information' check box for the New Homes is deselected.
7. Click Next twice, and then click Finish to return to the Environment Configuration window.
8. Click Next, and review the environment configuration on the Confirm Selections dialog box, and click Finish to save the changes to the environment.
9. Select File, New Job.
10. In the Use Template dialog box, select the template and click OK.
11. In the Type of Upgrade dialog box, select *Move to Production.*
12. Click OK.

    A new upgrade job is created, using the naming convention "*Template_Environment*_Move to Production."
13. Highlight the job name and select Edit, Set Documentation Directory.
14. Select the directory where the documentation is located and click OK.
15. Select View, Documentation.
16. 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.

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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

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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.

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Appendix A

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 A-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.

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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 PeopleSoft PeopleTools release level as the Copy of Production database on which you just completed the test Move to Production. Go to My Oracle Support and search for the PeopleSoft PeopleTools upgrade homepage for your new PeopleSoft PeopleTools release. Follow those instructions to upgrade your Tree/Query Copy of Production database to the new PeopleSoft PeopleTools release.

Task A-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, trees, and tree structures that you want to preserve.

To create a 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, 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 in 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 *Queries* under the PRESERVED project.

    A list of all of the queries to preserve appears 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

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preserve.

Task A-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 A-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

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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 A-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 retest and make any necessary changes if the test results are not what you expected.

Task A-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.

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Appendix B

Reviewing Tablespaces

This appendix discusses:

- Understanding Tablespace Review
- Reviewing Table Names

Understanding Tablespace Review

This appendix lists the tables that previously existed in 4K page size tablespaces that now reside in 32K page size tablespaces in the new release.

Task B-1: Reviewing Table Names

Task B-1-1: Reviewing 9.0 Table Names

Review the following 9.0 tables.

- AP_PAYSEL_AET
- EOEW_ETL_STEP
- OM_BCK04_AET
- OMB_PRICER_AET
- OM_HOLD_AET
- PV_ATT_DB_SRV
- RECV_LN_DISTRIB
- WM_ATTACHMENTS

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Appendix C

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 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.

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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 table below 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 C-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.

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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 C-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 C-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 C-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.

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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 C-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 C-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 C-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.

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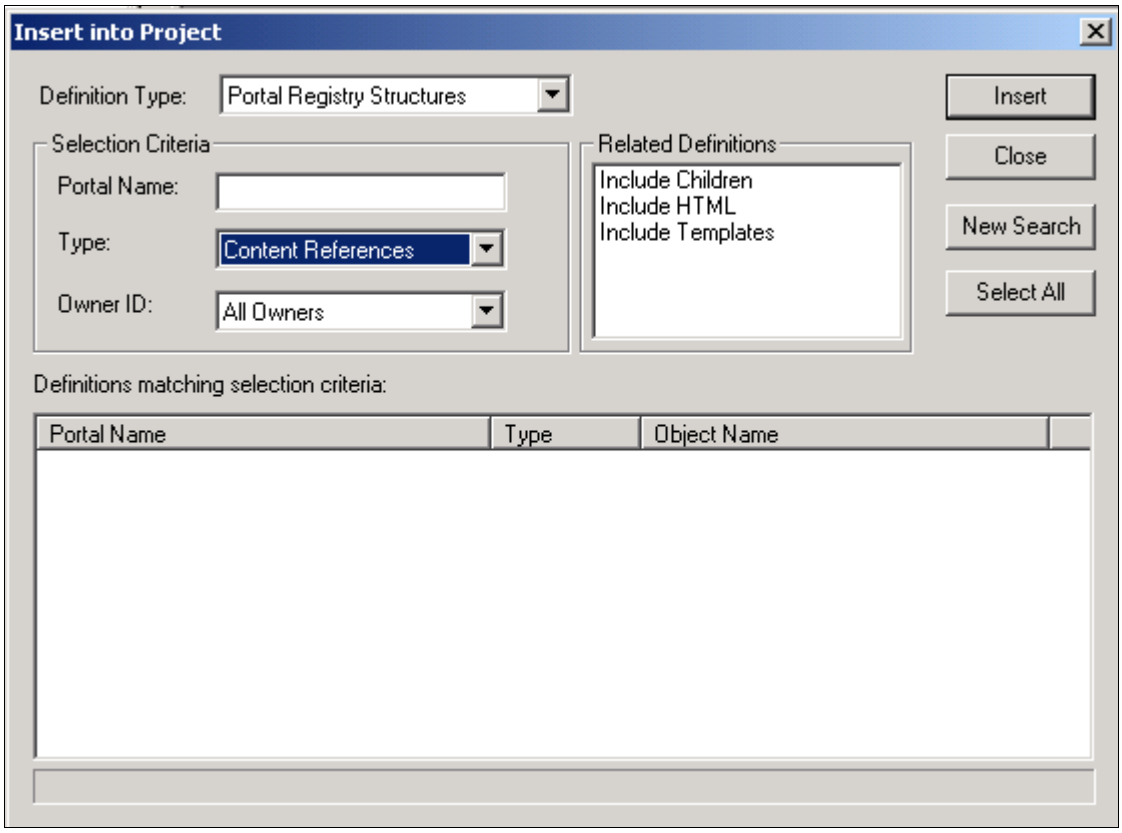
2. Select Insert, Definitions into Project…
3. Select the following values on the Insert into Project dialog box, as illustrated by this example:
   a. In the Definition Type field, select *Portal Registry Structures.*
   b. Leave the Portal Name field blank.
   c. In the Owner ID field, select *All Owners.*
   d. Do not select any values in the Related Definitions field.



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 C-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.

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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 C-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 C-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_APP_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_APP_HOME\SCRIPTS\UVUPX10I.DMS

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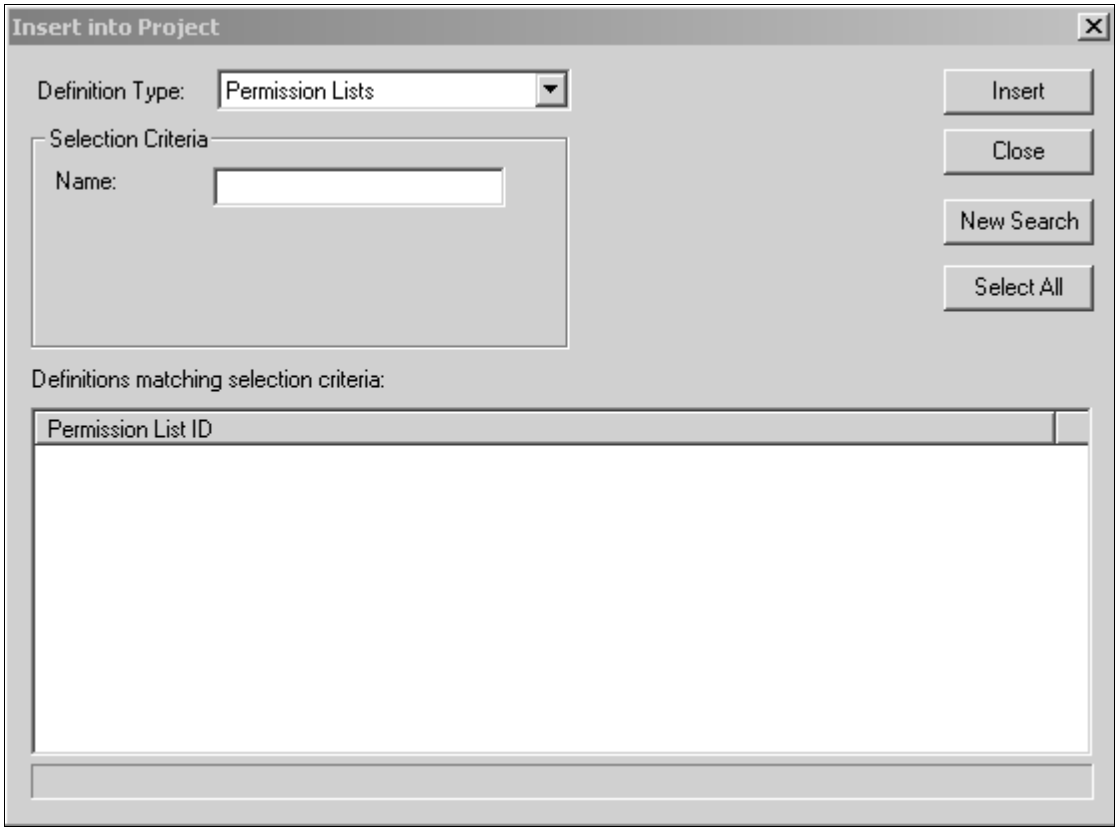
6. Close PeopleSoft Data Mover.

Task C-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.*

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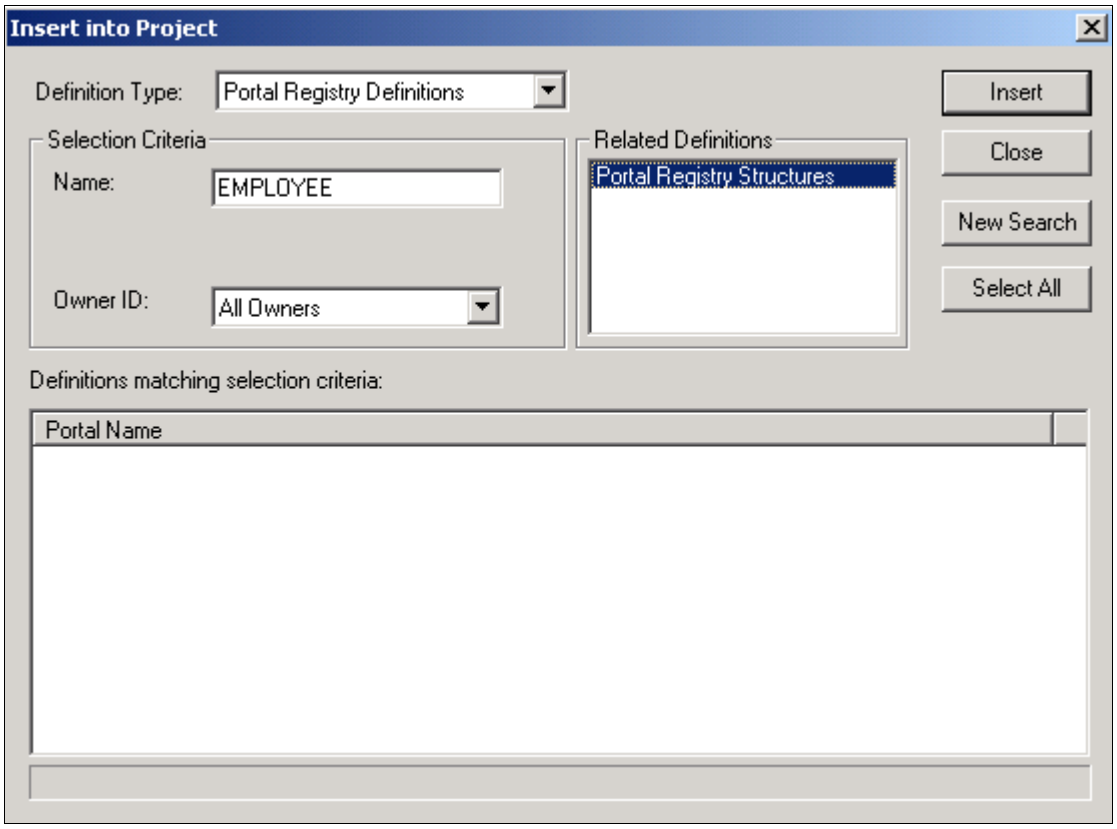
d. In the Related Definitions field, select *Portal Registry Structures.*



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.*

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This merges the objects from the PORTAL_PA84XREGISTERY project into your newly created Portal Project.

15. Select File, Save Project to save the updated Portal Project.
16. Close PeopleSoft Application Designer.

Task C-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 C-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.

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Task C-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 C-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 C-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.

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In this step, you copy the project from your Copy of Production database to your target PeopleSoft Portal Solutions database.

Task C-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 C-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 C-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

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Understanding Portal Project to Production Copying

You must perform this step during both your test and final Move to Production upgrade passes.

Task C-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 C-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_APP_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.*

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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 C-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 C-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 C-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_APP_HOME\SCRIPTS* directory:

   ```
   PORTAL_REG_FOLDER_DEL.DMS
   ```

3. Close PeopleSoft Data Mover.

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Task C-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 C-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 C-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:

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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 C-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.

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Appendix D

Using the Comparison Process

This appendix discusses:

- Understanding the Comparison Process
- Understanding Upgrade Compare Reports

Task D-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 PS*object*DEFN 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

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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 D-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 *PPLSOFT,* 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 *PPLSOFT,* 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 *PPLSOFT,* 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.
*Unchanged	The object has been compared, its LASTUPDOPRID value is not *PPLSOFT,* 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.

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Status Type	Definition
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 D-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 D-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.

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Task D-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 D-2: Understanding Upgrade Compare Reports

This section discusses:

- Reviewing Report Columns
- Using Reports

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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 D-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 D-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	XRFAPFL	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.

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Object Type(s)	Report Name	Report Description
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	XRFIELDS	Lists all fields in alphabetical order. The report includes Field Type, Length, Format, Long Name and Short Name.
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	XRFPCFL	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	XRFPNPC	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.

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Object Type(s)	Report Name	Report Description
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.

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