



# PeopleTools 8.12 Upgrade Assistant PeopleBook

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**SKU MTUAr8SP1B 1200.**

**PeopleBooks Contributors:** Teams from PeopleSoft Product Documentation and Development.

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## ABOUT THIS PEOPLEBOOK

This documentation describes the PeopleSoft Upgrade Assistant. The Upgrade Assistant is an innovative tool designed to assist you in performing PeopleSoft Application Upgrades. The Upgrade Assistant contains a template (based on your purchased product) with the upgrade steps included. You choose each step to perform in the upgrade process. The Upgrade Assistant then runs each step by launching programs and processes, monitoring the progress, performing the navigation needed to complete the step (for example, navigating to the correct panel and menu) and checking for errors. In addition, the Upgrade Assistant displays documentation relevant to the current step.

The Upgrade Assistant can improve the quality of your upgrade, reduce errors, and shorten the amount of time it takes to complete an upgrade. In addition, the Upgrade Assistant enables you to run certain steps in the upgrade unattended. During the unattended process, the Upgrade Assistant can inform you, by email, if errors occur.

This documentation describes how to install and use the PeopleSoft Upgrade Assistant. In this documentation, you will learn how to load your upgrade template, set step properties, and run your upgrade process. The Upgrade Assistant also enables you to configure certain options for your upgrade process.

The Upgrade Assistant PeopleBook contains the following chapters:

Installing the Upgrade Assistant describes the installation process.

Using the Upgrade Assistant describes how the Upgrade Assistant is organized and how to navigate through the interface.

Defining the Upgrade Template explains how to populate your upgrade template with the predefined upgrade steps and define the properties for each step in your upgrade.

Creating and Running the Upgrade Job describes the process for creating and running your upgrade.

Configuring and Editing Options describes how to create custom templates and configure and modify options in your upgrade template.

Describing Types and Options is a functional reference to the process types and upgrade options available in the Upgrade Assistant.

## Before You Begin

This documentation assumes you have a basic understanding of the PeopleSoft system. One of the most important components to a successful upgrade of your PeopleSoft installation is your onsite experience. You need to 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 recommends that, prior to performing your upgrade, you have completed at least one PeopleSoft introductory training course. If you want additional information about PeopleSoft training courses, please refer to the Education category on Customer Connection.

## Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of the specific PeopleSoft applications your company uses. You can access additional documentation for this release from PeopleSoft Customer Connection ([www.peoplesoft.com](http://www.peoplesoft.com)). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.



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

---

### Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: <http://www.peoplesoft.com/>

You'll also find updates to the documentation for this release on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

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### Documentation on CD-ROM

Complete documentation for this PeopleTools release is provided in HTML format on the PeopleTools PeopleBooks CD-ROM. The documentation for the PeopleSoft applications you have purchased appears on a separate PeopleBooks CD for the product line.

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### Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.



We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

<b>Internet</b>	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.  PeopleSoft Internet site: <a href="http://www.peoplesoft.com/">http://www.peoplesoft.com/</a> .
<b>Telephone</b>	Contact Consolidated Publishing Incorporated (CPI) at <b>800 888 3559</b> .
<b>Email</b>	Email CPI at <a href="mailto:callcenter@conpub.com">callcenter@conpub.com</a> .

## Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

<code>monospace font</code>	Indicates PeopleCode.
<b>Bold</b>	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).  We also use boldface when we refer to navigational paths, menu names, or process actions (such as <b>Save</b> and <b>Run</b> ).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: <b><i>field value</i></b> .  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter O.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.
Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in <i>italics</i> indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:  <hr/> <div>For more information, see <u>Documentation on CD-ROM in About These PeopleBooks</u>: Related Documentation.</div> <hr/>
• Topic list	Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.
Name of Page or Dialog Box	Opens a pop-up window that contains the named page or dialog box. Click the icon to display the image. Some screen shots may also appear inline (directly in the text).



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



Text in this bar indicates For more information cross-references to related or additional information.



Text within this bar outlined in red indicates a crucial configuration consideration. Pay very close attention to these warning messages.

## Comments and Suggestions

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

PeopleTools Product Documentation Manager  
PeopleSoft, Inc.  
4460 Hacienda Drive  
Pleasanton, CA 94588

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

[DOC@PEOPLESOFT.COM](mailto:DOC@PEOPLESOFT.COM)

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



## CHAPTER 1

# Installing the Upgrade Assistant

In this task, you will perform steps to install the Visual Basic Runtime Module and the PeopleSoft Upgrade Assistant. This task includes the following:

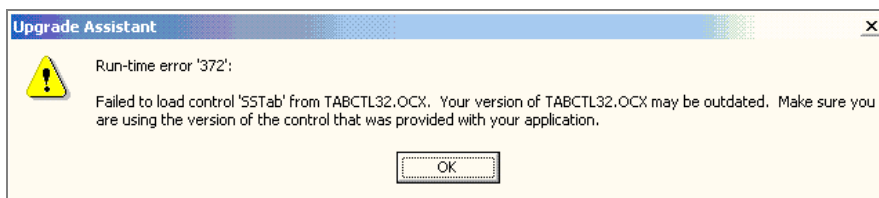
- Install Visual Basic 6.0 Runtime Module
- Install the Upgrade Assistant

## Install Visual Basic 6.0 Runtime Module

Visual Basic 6.0 Runtime Module SP4 must be installed on your machine prior to installing the Upgrade Assistant. The service pack can be downloaded from the following website:

<http://support.microsoft.com/support/kb/articles/Q235/4/20.asp>

If you have not yet installed Visual Basic 6.0 Runtime Module SP4, you may receive the following error message when you attempt to run or install the PeopleSoft 8 Upgrade Assistant:



## Install the Upgrade Assistant

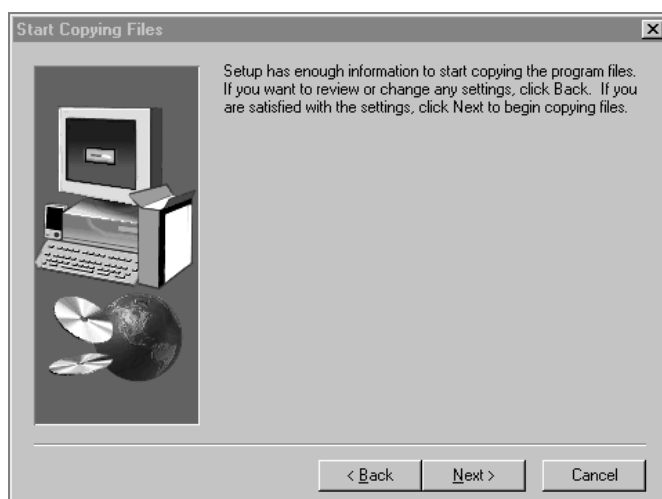
Perform the steps in the task to install the PeopleSoft Upgrade Assistant.

To install the PeopleSoft Upgrade Assistant:

1. From the PS\_HOME/Setup/Upgrade Assistant directory, run **Setup.exe**. The Welcome screen appears.
2. Select **Next**. The PeopleSoft Upgrade Assistant 8.12 screen appears:



3. You can accept the default **Destination Folder** or specify another **Destination Folder**.
4. Select **Next**. The **Start Copying Files** screen appears, as follows:



5. If you want to review or change any settings, click **Back**. If you are satisfied with your setting, click **Next** to begin copying files. The Upgrade Assistant copies files to the designated directory. The **Setup Complete** screen appears:



6. Click **Finish** to complete the Setup process.
7. You can open the Upgrade Assistant by selecting Start, Programs, PeopleSoft 8, Upgrade Assistant.





## CHAPTER 2

# Using the Upgrade Assistant

This chapter describes how the Upgrade Assistant is organized and how to navigate through the interface.

The Upgrade Assistant consists of two views — the Upgrade Template view and the Job Status view — and corresponding toolbar menus for each view.

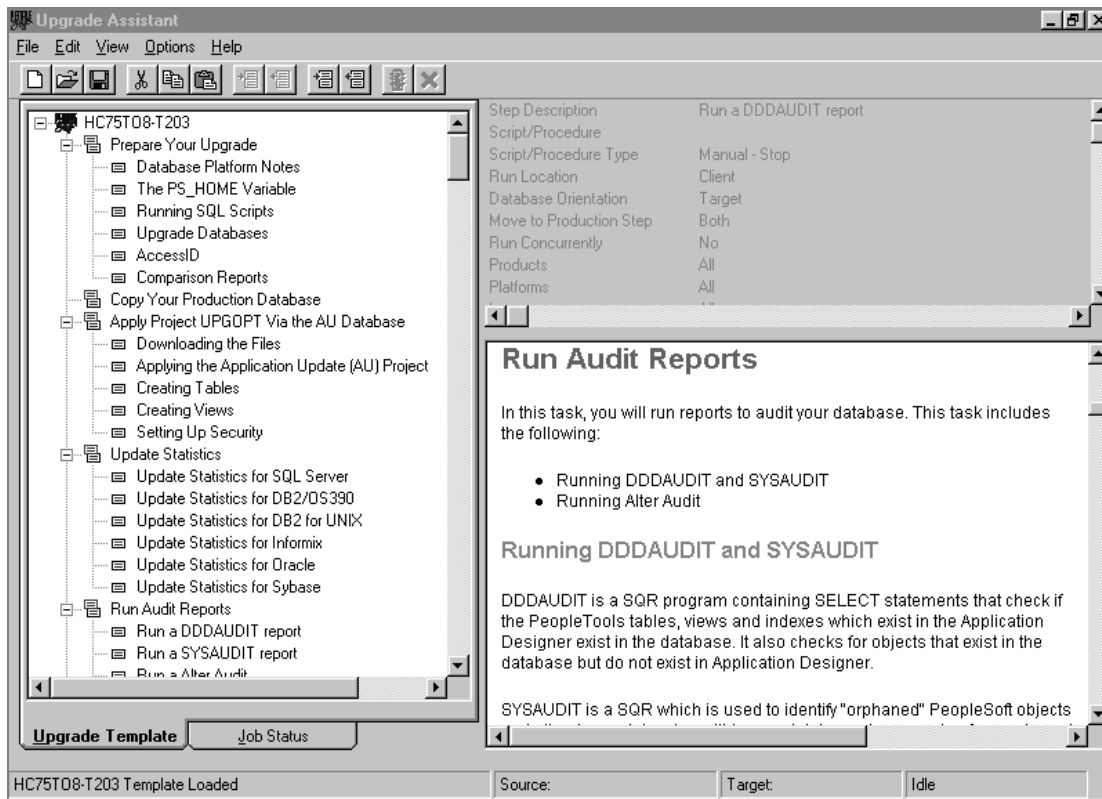
## Upgrade Template View

On the Upgrade Template view, you can open or create an upgrade template, view the upgrade steps, specify step properties, view step descriptions and properties, and view upgrade instructions.

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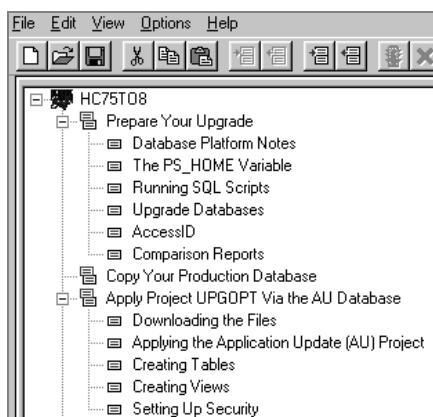
### Upgrade Template Sections

The Upgrade Template view is divided into three main sections; the Template Tree, the Description and Properties section, and the Documentation Window, as shown in the example below:



## Template Tree

The Tree section displays the task and steps for your selected upgrade product. Tasks are section levels that contain one or more steps. Steps are the actual upgrade steps you select to run your upgrade job. During the upgrade process, you will assign properties at the step level, not the task level. The following example displays the task and steps in the upgrade template:



You can expand a task, to display the steps within the task, by selecting the plus (+) sign next to the task name. You will expand a task before setting up step properties during the upgrade process.

You can also set the tasks in the tree structure to automatically expand when you open your template.



For more information about expanding tasks, see Specifying General Settings.

## Description and Properties

This section displays the default properties assigned to each step, as well as the step properties you designate for each step. Each time you assign properties for a step in your upgrade, the Upgrade Assistant displays your selected properties in this section.

## Documentation Window

This section displays the instructions for your current step; for example, if you select the step titled "Update Statistics," the Upgrade Assistant displays the instructions for that step.



**Note.** You can also download printed instructions for your upgrade on Customer Connection, Library, Upgrade Documentation, then choose the category for your upgrade product.

## Upgrade Template Toolbar Menus

The Upgrade Template Toolbar contains menus that enable you to create new templates, open existing templates, specify step properties, and specify general settings.

### File Menu

The File menu on the Upgrade Template toolbar contains options that enable you to create a new upgrade template, open an existing upgrade template, and save your upgrade template.

<b>Command</b>	<b>Description</b>
New Upgrade Template	Select this option to create your own upgrade template. After creating your own template, you can insert steps, scripts, and procedures to customize your upgrade.
Open Upgrade Template	Select this option to load a PeopleSoft-delivered template for your upgrade product. When you select this option, the Upgrade Assistant loads the template with your selected upgrade product line.

<b>Command</b>	<b>Description</b>
Save Upgrade Template	Select this option to save your upgrade template and the properties and configurations you have designated for the template.

## Edit Menu

The Edit menu on the Upgrade Template view enables you to insert or delete information for your upgrade template.

<b>Command</b>	<b>Description</b>
Step Properties	Enables you to set step properties for each step in your upgrade. On the Step Properties dialog box, you will specify properties that determine the conditions that apply when you run the upgrade process.
Insert Task	Enables you to insert a task into an existing or new upgrade template. A task serves as a section head for one or more steps.
Delete Task	Enables you to delete a task from an upgrade template.
Insert Step	Enables you to insert a step into an upgrade template.
Delete Step	Enables you to delete a step from an upgrade template.
Rename	Enables you to rename an existing task or step in an upgrade template.
Set Documentation Directory	Enables you to specify the directory in which your upgrade documentation is stored. The Upgrade Assistant loads the upgrade documentation for viewing during the upgrade process.

## Options Menu

The Options Menu on the Upgrade Template view enables you to edit general settings, specify email settings, and merge templates.

<b>Command</b>	<b>Description</b>
Upgrade Assistant	Enables you to specify general settings to display the entire template tree. In addition, you can specify email settings to automatically notify you of any errors encountered during the upgrade process.
Merge Templates	Enables you to merge an existing upgrade template with a new upgrade template.

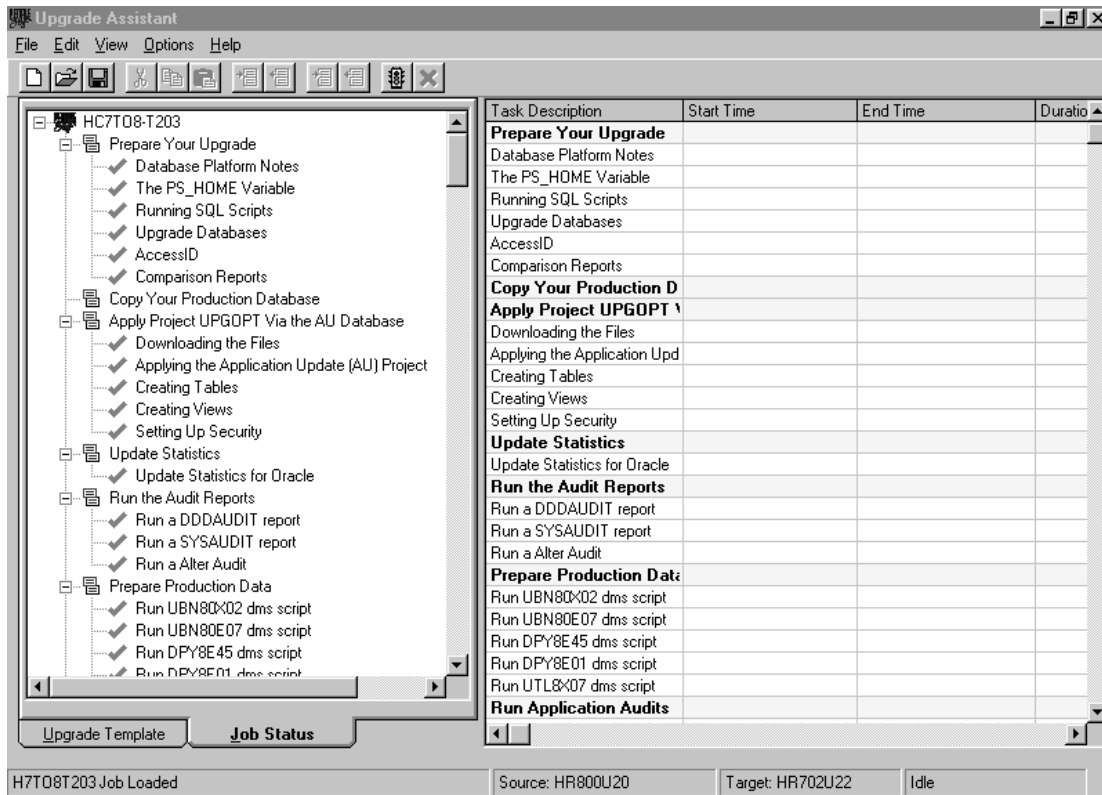
## Job Status View

On the Job Status view, you can create a new upgrade job, open an existing upgrade job, run the upgrade process, and view the job status of each step in your upgrade.

---







### Job Status Sections

The Job Status view contains two sections; the Template Tree and the Status Grid, as shown below:



## Template Tree

On the Job Status view, the Template Tree indicates the status for each step in your upgrade. The status is indicated by the following symbols:

Name	Symbol	Description
Run		This green icon indicates that the Upgrade Assistant will run this step or process.
Stop		This red icon indicates that the Upgrade Assistant will stop on this process.
Restart		Indicates a restart process. The Upgrade Assistant will stop on these processes and you will have to restart the Upgrade Assistant after you complete the manual process.
Processing		Indicates that the process is running.
Error		Indicates an error.
Complete		Indicates that the step is complete.

## Status Grid

The Status Grid displays the current step or process and provides information about it. The Status Grid includes the following:

<b>Column</b>	<b>Description</b>
Step Description	When you highlight a task or step in the Template Tree section, the Upgrade Assistant displays the step in the Status Grid.
Start Time	Indicates the run start time of the step or process.
End Time	Indicates the run end time of the step or process.
Duration	Indicates the run duration of the step or process.
Total Duration	Indicates the run duration of all steps you have run up to that point in the upgrade.
Status	Indicates the current status of the step or process; for example: run, stop, restart, error, complete

---

## Job Status Toolbar Menus

The Job Status Toolbar contains menus that enable you to create a new upgrade job, open an existing upgrade job, edit the job status, edit the database configuration, specify general settings and email settings, and merge templates.

### File Menu

The File menu on the Job Status view toolbar contains options that enable you to create a new upgrade job, open an existing upgrade job, or save an upgrade job.

<b>Command</b>	<b>Description</b>
New Upgrade Job	Enables you to create a new upgrade job from an existing upgrade template.
Open Upgrade Job	Enables you to open an existing upgrade job.
Save Upgrade Job	Enables you to save changes to your current upgrade job.

## Edit Menu

The Edit menu on the Job Status view toolbar enables you to modify the status of a step or process in your upgrade.

<b>Command</b>	<b>Description</b>	<b>Keyboard Shortcut</b>
Run	Enables you to change the status of a step or process to <i>Run</i> .	F4
Stop	Enables you to change the status of a step or process to <i>Stop</i> .	F5
Restart	Enables you to change the status of a step or process to <i>Manual</i> .	F6
Complete	Enables you to change the status of a step or process to <i>Complete</i> .	F7
View Log	Enables you to view output generated from running the step.	

## View Menu

The View Menu on the Job Status view toolbar enables you to view the documentation relevant to the current step.

## Options Menu

The Options Menu on the Job Status view toolbar enables you to edit your database configuration, general settings, and email settings. In addition, you can merge upgrade templates.

<b>Command</b>	<b>Description</b>
Database Configuration	Enables you to set your database configuration, specify directories and products, set profiles and run locations, and specify import and export settings.
Upgrade Assistant	Enables you to specify general settings to display the entire template tree. In addition, you can specify email settings to automatically notify you of any errors encountered during the upgrade process.



<b><i>Command</i></b>	<b><i>Description</i></b>
Merge Templates	Enables you to merge an existing upgrade template with a new upgrade template. This option is used primarily for maintenance releases.



## CHAPTER 3

# Defining the Upgrade

The PeopleSoft Upgrade Assistant uses a template for each product line and release you are upgrading (for example, HRMS 7.5 to 8.0). The Upgrade Template contains the tasks, steps, SQL scripts, Data Mover scripts, SQRs, and Application Designer tasks associated with the upgrade. In this chapter, you will load the template into the Upgrade Assistant. Then you will define the properties for each step in your upgrade.

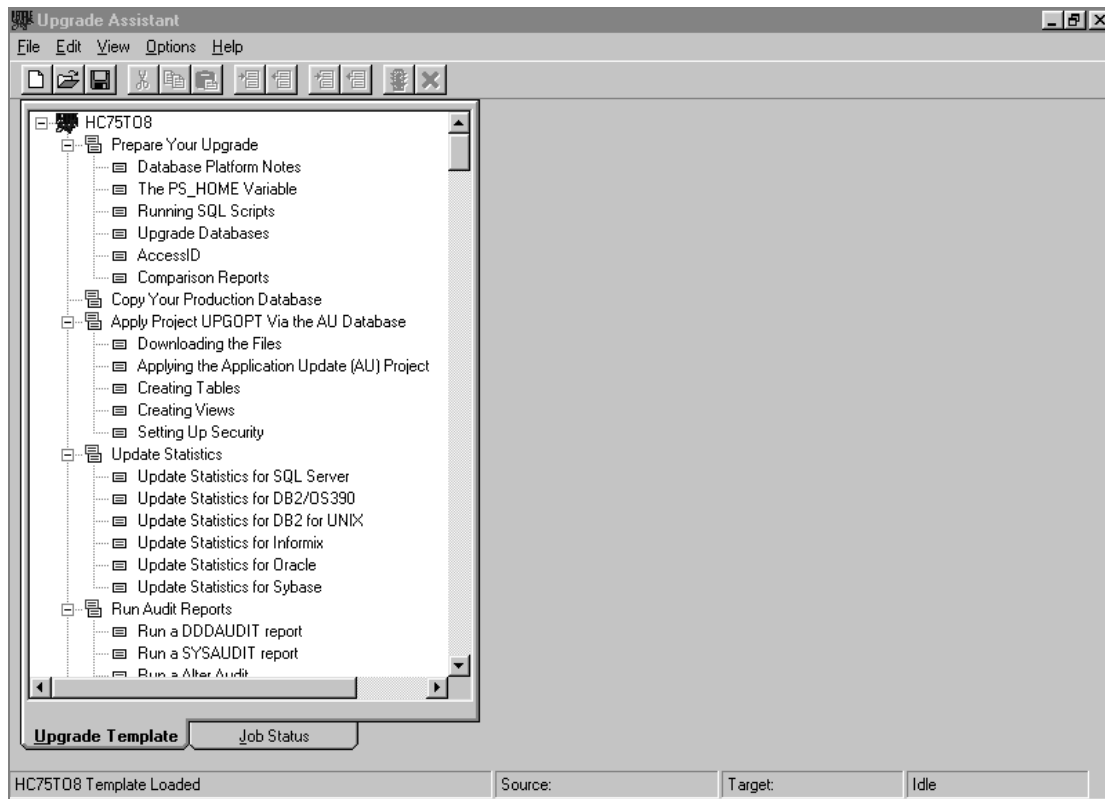
## Select the Upgrade Template

In this task, you will load the upgrade template for your product line.

To load the upgrade template:

1. Launch the Upgrade Assistant. A blank Upgrade Assistant template appears. You will load the Upgrade Assistant with a template for your selected product and path.
2. Select **File, Open Upgrade Template**. The Open Upgrade Template dialog box appears.
3. Select the directory in which you stored the upgrade template when you installed the Upgrade Assistant files.
4. Select the template for your product and path (for example, HRMS 7.5 to 8.0).

The Upgrade Assistant loads the template with the steps for your upgrade product, as shown below:

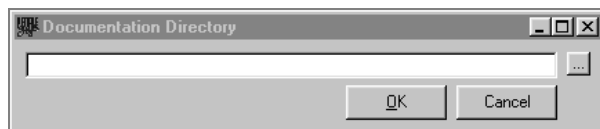


## Set the Documentation Directory

Now you will set the Documentation Directory. The Upgrade Assistant enables you to view the upgrade documentation, relevant to the step you are performing. You will select the directory in which you stored the upgrade documentation when you installed the Upgrade Assistant files. The Upgrade Assistant locates the documentation from this directory and loads it into the Documentation Window.

To set the documentation directory:

1. Highlight the top node (template name) of your template tree.
2. Select **Edit, Set Documentation Directory**. The Documentation Directory dialog box appears:



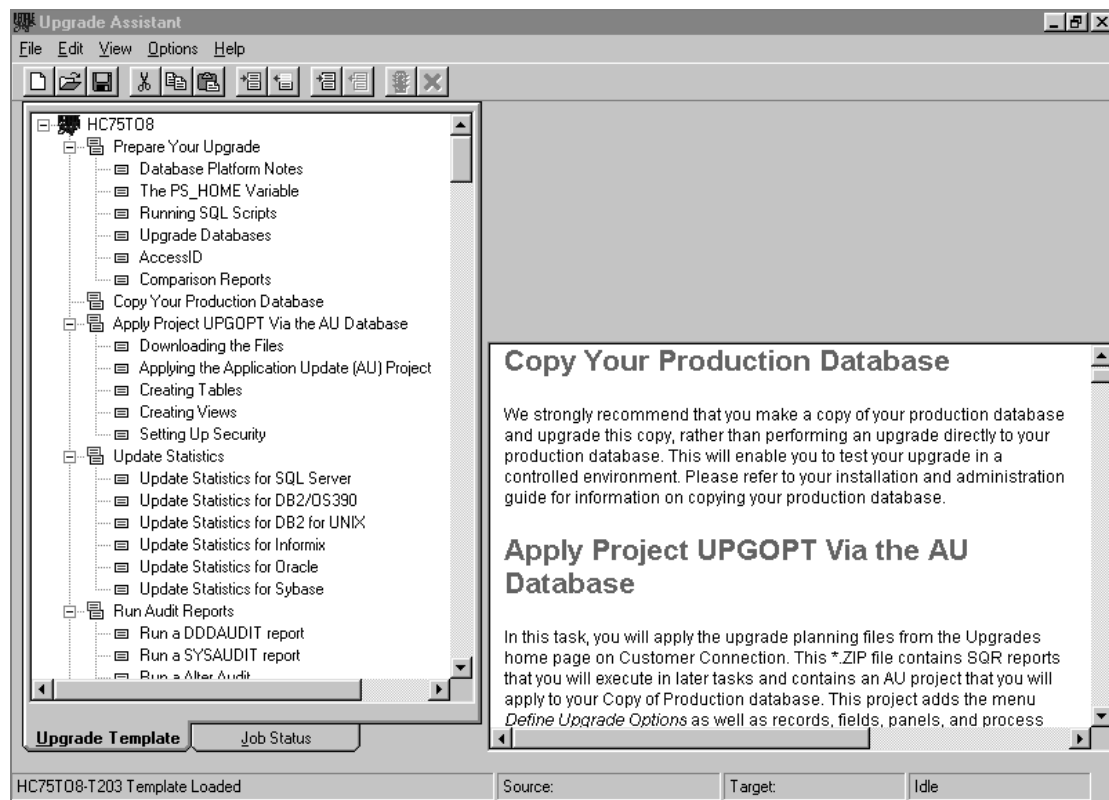
3. Enter (or browse to) your documentation directory.



The documentation directory is the directory to which you downloaded the upgrade documentation from Customer Connection.

#### 4. Select **OK**.

Now, when you select a task or step in the Upgrade Assistant template tree, the Upgrade Assistant displays the corresponding upgrade documentation, in the Documentation Window, as follows:



## Define Step Properties

Once you have loaded your upgrade template and set your documentation directory, you need to define the appropriate properties for each step. You will actually define properties at the step level, not the task level. You will open the Step Properties dialog box to set the properties for each step in your upgrade. Setting these properties determines the conditions that apply when you run the upgrade process.

When you open your template, the Upgrade Assistant displays the tasks only. You must expand these tasks to display the steps within each task. Select the plus sign (+) to expand an individual task and display the steps within that task. You can also configure your general settings to expand all tasks in the upgrade template.



For more information about expanding tasks, see *Specifying General Settings*.

To define the step properties:

1. Highlight the step for which you want to assign step properties, then select **Edit, Step Properties**.

The Upgrade Assistant displays the Step Properties dialog box:

2. Verify that the step description corresponds to the step you selected.
3. Enter the script or procedure, if one is associated with the current step, in the **Script/Procedure** field. This field is used for SQL scripts, Data Mover scripts, SQRs and Application Engine Processes.
4. Select a **Type** from the Type drop-down list. This selection defines the type for the script or procedure you selected.



For a discussion of each **Type**, see Understanding Process Types.

---

The following lists the available types:

Application Engine  
 Build Project  
 Convert Application Engine  
 Convert Fieldnames  
 Convert PeopleCode  
 Convert Workflow  
 Create Project

Custom Defined Process

Data Mover - Bootstrap

Data Mover - User

Manual - Stop

SQL Command

SQL Script

SQR Report

Upgrade Compare

Upgrade Copy



**Note.** If you select *Create Project* from the Type drop down list, you must set a #Type parameter. For a list of parameters, see the next step.



When you select **Build Project** from the Type drop down list, a Build options button appears. You will select options based on the instructions in the upgrade documentation for your product and path.



For information about build options, refer to Understanding Build Options.



When you select **Upgrade Compare** or **Upgrade Copy** from the Type drop down list, the Upgrade Options push button appears. You will select options based on the instructions in the upgrade documentation for your product and path.

5. Enter the **Parameters**. You can set additional parameters you need to run your step. For SQL commands, you enter the actual SQL command in this field.

The additional parameters are as follows:

<b>Parameter</b>	<b>Description</b>
#Project=	Used primarily for functions that require a project name; for example, Build Project, Upgrade Compare, or Upgrade Copy.

<b>Parameter</b>	<b>Description</b>
#Directory=	Used when you need to run a script that is not located in the %PS_HOME%\scripts directory; for example, STOREPT. In this case, you could enter: #Directory=#PT_PSHOMESrc\cbl\base\
#P1= through #P5=	Used to pass parameters to SQR reports; for example, DBTSFIX.sqr. In this case, you would pass the necessary value, such as: #P1=3OutputDirectory
#Rename=	Used primarily for the Convert FieldNames step type. It will automatically copy the CONVERT-XXXX.INF file from the %PS_HOME%\scripts directory into the c:\temp\ and rename the file to CONVERT.INF.
#PTPS_HOME and #APPPS_HOME	Used to specify the %PS_HOME% variable that is defined in the Database Configuration window.
#Output Directory	Used to specify the Output Directory variable that is defined in the Database Configuration window.
#Type	Enables you to specify the type of record to insert into the project. Choose from the following record types: All Records Table View/Query View Derived SubRecord Stored Procedure Temporary Table Dynamic View

6. Select **Client** or **Server** from the Run Location drop-down list. In this field, you indicate whether to run the particular step, script, or procedure on the Client or a Process Scheduler Server.

If you choose the Server, the Upgrade Assistant checks the Database Configuration for the name of the process scheduler. You will specify your Process Scheduler during the Database Configuration steps.



**Note.** Selecting a Run Location applies to Application Engine processes only.



7. Select the **Database Orientation**. Select **Source** or **Target** from the Database Orientation drop-down list. In this field, you indicate whether to run the step, script, or procedure against the Source or Target database, as defined by the database configuration.



**Note.** The default orientation is *Target*, but in certain steps, such as the Export and Copy or the Project Compare, you are required to log into the Source first. In these cases, set the Database Orientation to *Source*.

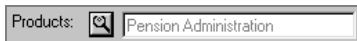
8. Click on the **Products** icon, as shown below:

The Upgrade Assistant displays the Products dialog box:

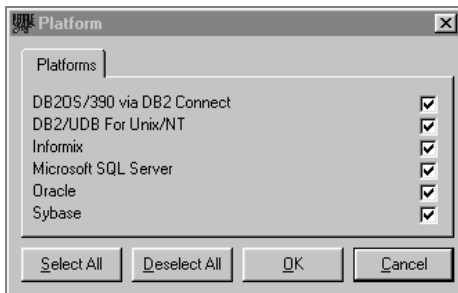
Product	Product Code
<input checked="" type="checkbox"/> Benefits Administration	BA
<input checked="" type="checkbox"/> Payroll	PY
<input checked="" type="checkbox"/> Payroll Interface	PI
<input checked="" type="checkbox"/> Pension Administration	PA
<input checked="" type="checkbox"/> Time and Labor	TL

This dialog box contains the Products and Product Codes. You will select the products your step should be run against. This feature is used primarily for data conversion processes.

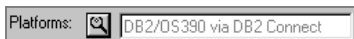
9. Select the product type you want to upgrade from the drop-down list; for example, **Human Resources** or **Financials, Distribution, and Manufacturing**.
10. Select one or more product lines from the checklist.
11. Click **OK**. The Upgrade Assistant displays your product selection in the Products field of the Step Properties dialog box, as shown in the example below:



12. Click on the **Platforms** icon. The Platform dialog box appears:



13. Select the platform you want to run against your upgrade step.
14. Select **OK**. The Upgrade Assistant displays your platform selection in the Platform field of the Step Properties dialog box, as shown in the example below:



15. Select the **Language** icon. The Upgrade Assistant displays the Language dialog box:



In this field, you select the language(s) you have loaded in your database.

16. Select one or more languages.
17. Select **OK**. The Upgrade Assistant displays your language selection in the Language field of the Step Properties dialog box, as shown in the example below:



18. Select the Type of Upgrade Step. Select from **Initial Upgrade**, **Move to Production**, or **Both**. The default selection is **Both**.

In this field, you indicate whether to use the step, script, or procedure in the Initial Upgrade, the Move to Production, or both parts of the upgrade process. The Upgrade Assistant automatically filters steps by platform, product, and language.

19. Select the Language Type.

If you select **Installed Language**, the Upgrade Assistant will run the step against the language installed in your database. If you choose this option, the Upgrade Assistant filters your upgrade for the current step based on the language you choose on the Database Configuration, Language tab. In most cases, you will choose this option.

If you select **Base Language**, the Upgrade Assistant runs the step against the base language. This option is used primarily if you are running a step that involves currency scripts. If you select this option, you must also select your base language in the *Target Base Language* drop-down list on the Database Configuration dialog box. The Upgrade Assistant then filters your upgrade, for the selected step, based on that selection.

- 20.** Set your **Allow for Errors** preference. Select **Yes** to allow for errors in the step or **No** to set for no errors in the step. If you set this preference to *No*, the Upgrade Assistant stops the upgrade process if it encounters an error. If you set this preference to *Yes*, the Upgrade Assistant continues the run process if it encounters an error. The default setting is *No*.



If you select *No* to the **Allow for Errors** preference, you can configure the Upgrade Assistant to notify you, by email, if an error occurs.

---



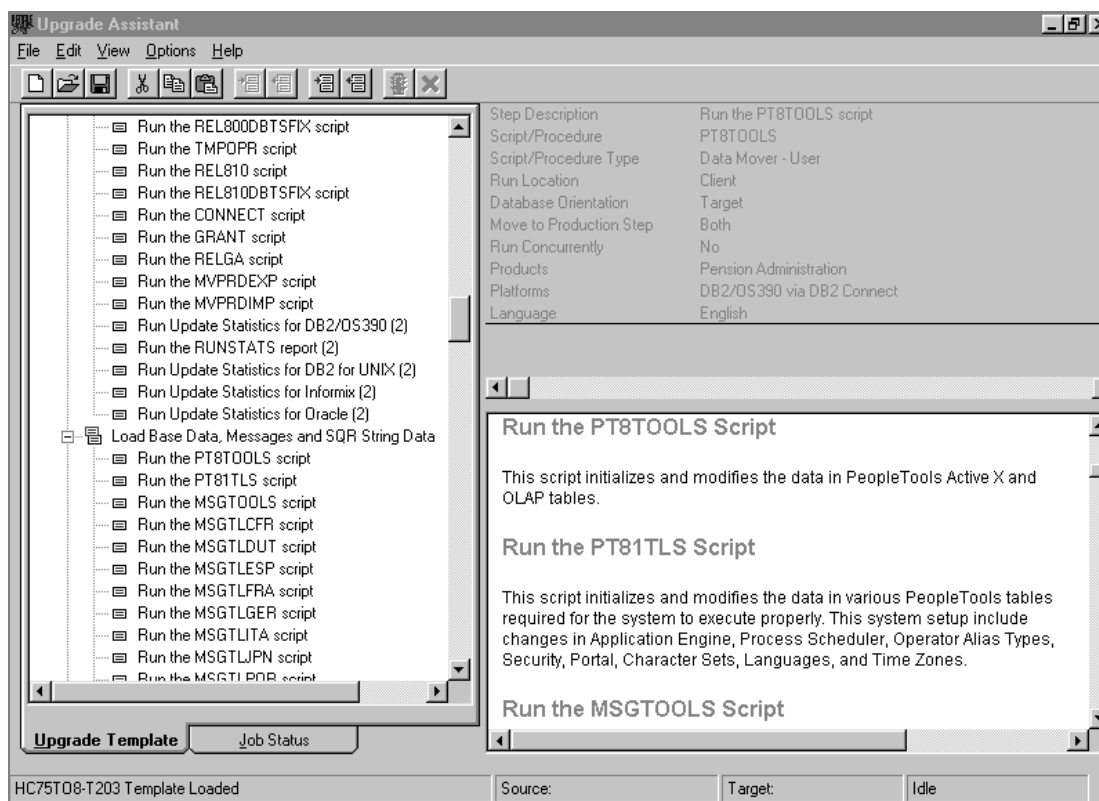
For information about setting email notification, see [Specifying Email Settings](#).

---

- 21.** Select your **Run Concurrently** preference. Select **Yes** to run the step concurrently or **No** to run the step individually. The default setting is *No*.

The Upgrade Assistant has the ability to run certain upgrade steps concurrently; for example, you can run several Application Engine, SQR, or SQL scripts simultaneously. If you answer *Yes* to two or more steps, the Upgrade Assistant will launch those processes concurrently, until it reads a step that has been set to *No*.

- 22.** When you have completed defining the properties for this step, select **OK** on the Step Properties dialog box. The Upgrade Assistant dialog box reappears:



The step properties you defined for the current step are displayed in the Description and Properties section of the dialog box.

23. Repeat steps 1 through 22 for each step in your upgrade.
24. **Save the Template.**

## CHAPTER 4

# Creating and Running the Upgrade Job

Once you have defined your upgrade template, you will create and run the upgrade job. You will create the upgrade procedure for your particular environment, using the step properties you set for your platform, product line, and language combination.



You can create multiple upgrade jobs for each upgrade template.

---

## Create the Upgrade Job

In this task, you will create the upgrade job, then set the configuration. The Upgrade Assistant uses your configuration information to filter the upgrade path.



You must load your template and define the step properties before creating the upgrade job.

---



For information about loading your template, see [Defining the Upgrade](#).

---

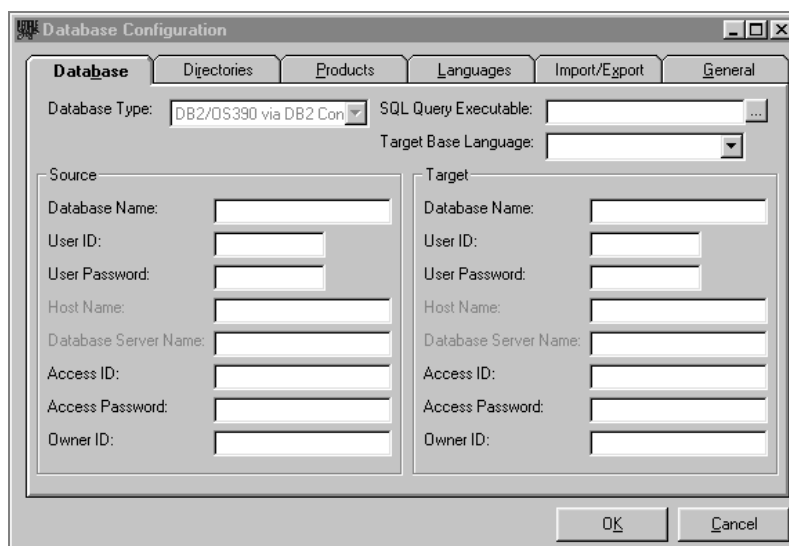
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## Creating the Upgrade Job

In this task, you will create and name your new upgrade job.

To create the upgrade job:

1. Select the Job Status view on the Upgrade Assistant.
2. Select **File, New Upgrade Job**. The Create New Job File dialog box appears.
3. Enter a name for your Upgrade Job; for example, the name of your database.
4. Select **Save**. The Database Configuration dialog box appears:



You will use this dialog box to configure your database properties.

## Configuring Your Database

In this task, you will set properties for your database. You will define your database type, select a target base language, and set your query executable file.

To configure your database:

1. Select the **Database** tab.
2. Select your **Database Type** from the Database Type drop-down list.
3. Select your **SQL Query Executable** file. This is the SQL Query tool that you use to run SQL queries from your Client workstation. Select from the following:

<b>Platform</b>	<b>Utility</b>
DB2/OS390	Use the DB2 Command Center (ex. DB2CMD.exe)
DB2/UNIX	Use the DB2 Command Center (ex. DB2CMD.exe)
Informix	Use the SQL Editor Query Tool (ex. SQLEDITOR210.exe)
Microsoft SQL Server	Use OSQL.exe
Oracle	Use SQLPLUS.exe
Sybase	Use SQLADV.exe for Sybase 11 Use ISQL.exe for Sybase 12

4. Select your **Target Base Language** from the drop-down list. The Target Base Language is

used for Currency scripts that are run according to the Base language, rather than the installed language. If you selected the *Base Language* option on the Step Properties dialog box, you must choose the same language here.

5. Enter the following information for each object in the **Source** column and the **Target** column:

<b>Object</b>	<b>Description</b>
Database Name	Name of the Target (Copy of Production) or Source database.
User ID	PeopleSoft User ID you use to log into the Target Database.
User ID Password	PeopleSoft User ID password.
Host Name	Actual Server Name on which the database server resides (Microsoft SQL Server only).
Database Server Name	Name of the Source or Target Database Server (Informix, Sybase, and SQL Server only).
Access ID	Owner ID of the Source or Target Database.
Access Password	Owner ID password
Owner ID	Choose a table owner ID for the PeopleSoft tables. The table owner ID can be either an access ID, a secondary authorization ID, or a generic ID.

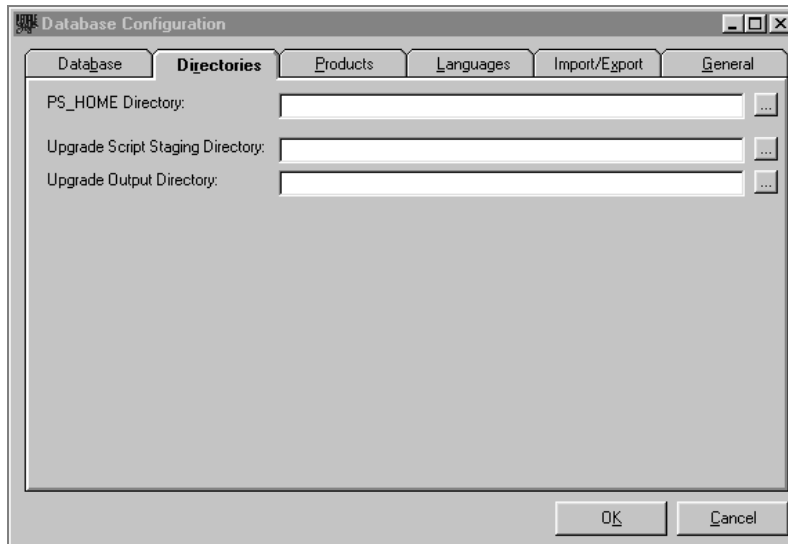
---

## Specifying the Directories

In this task, you will select your upgrade script staging and output directories.

To set the directories:

1. Select the **Directories** tab. The following appears:



2. Select the **PS\_HOME Directory**. This is the directory that may be listed on the file server. The Upgrade Assistant uses this information to retrieve application and PeopleTools scripts and data files.
3. Select the **Upgrade Script Staging Directory**. The Upgrade Assistant edits the scripts during the upgrade process and locates all the scripts into one central directory.



**Note.** The Upgrade Script Staging Directory and the Upgrade Output Directory **cannot** be the same.

4. Select the **Upgrade Output Directory**. The Upgrade Assistant executes all of the scripts and processes during the upgrade process and sends the output into the Upgrade Output Directory.

---

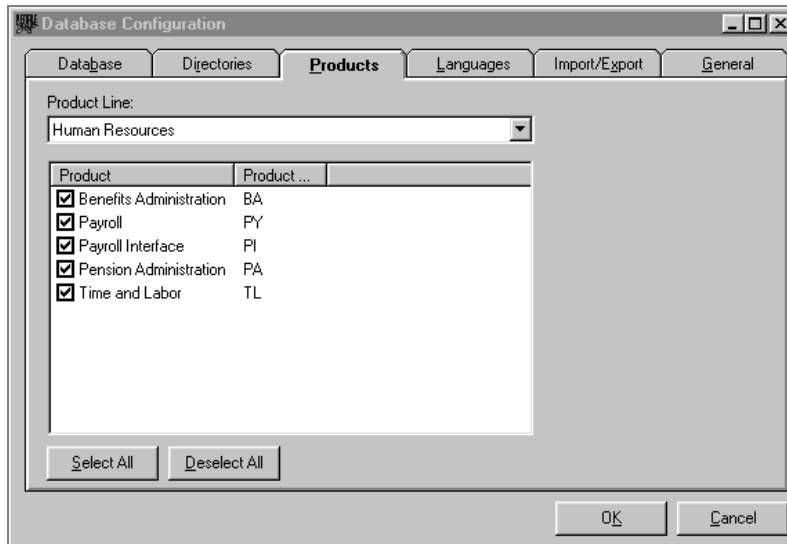
## Selecting the Products

In this task, you will select the products to run against your database.

To select the products:

1. Select the **Products** tab. The following appears:





2. Select your **Product Line** from the drop-down list. The Upgrade Assistant displays the products for your product line.
3. Select the checkbox for the product or products you have installed in your database.



**Note.** Previously, in the Step Properties dialog box, you selected products to apply to your upgrade steps. In this part of the process, you select products to apply to your database.

4. Select **OK**. The Upgrade Assistant again displays the Database Configuration dialog box.

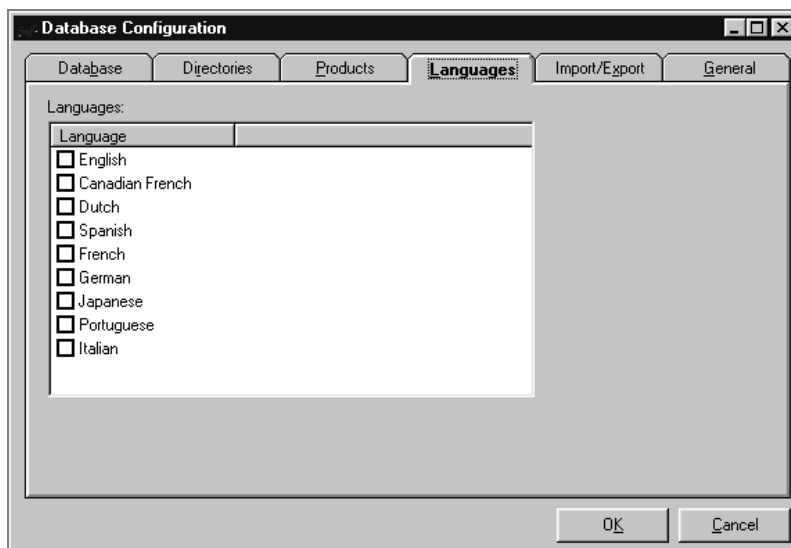
---

## Setting Your Language Preference

In this task, you will specify the language you have installed in your database.

To set your language preference:

1. Select the **Languages** Tab. The following appears:



2. Select the checkbox for the language you have installed in your database.

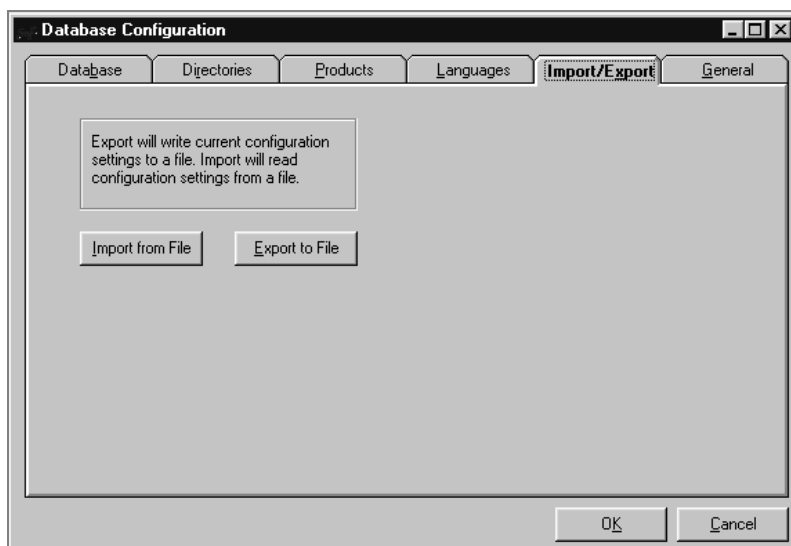
---

## Setting the Import and Export Preferences

In this task, you will set your import and export configuration settings preferences.

To set the import and export preferences:

1. Select the **Import/Export** tab. The following appears:



2. When you select **Import to File**, the Upgrade Assistant reads the configuration settings from a file.
3. When you select **Export to File**, the Upgrade Assistant writes the current configuration settings to a file.

## Setting General Preferences

In this task, you will set the Configuration Manager Profile. In this release, it is necessary to create individual user profiles for Process Scheduler configurations. The Upgrade Assistant can run processes, such as Application Engine processes, on the Process Scheduler server. The Upgrade Assistant uses the information you specify for the Configuration Manager and Process Scheduler to run these processes on the server.

To set general preferences:

1. Select the **General** tab. The following appears:

The screenshot shows the 'Database Configuration' dialog box with the 'General' tab selected. The 'Type of Upgrade' is set to 'Initial Upgrade'. Under 'Application Server/Process Scheduler Configuration', the 'Configuration Manager Profile' and 'Process Scheduler Name' are set to empty dropdown menus. The 'Application Server Machine Name' is an empty text field. The 'JSL Port' is an empty text field. The 'FTP User ID' and 'FTP User Password' are empty text fields. The 'FTP Server Output Directory' is an empty text field. Under 'Application Engine Run Location', the radio button 'Set All AE Tasks to run on the Client' is selected. A 'Reset' button is located next to the radio buttons. At the bottom right are 'OK' and 'Cancel' buttons.

2. Select the Type of Upgrade. Choose from Initial Upgrade or Move to Production.

When performing the initial upgrade on your Copy of Production, you will want to choose the *Initial Upgrade* option. The Upgrade Assistant displays only those steps that apply to the initial upgrade. Give your upgrade job a name indicative of the initial upgrade; for example, `<dbname>_initupg` (where `<dbname>` is your database name).

When performing your test move to production, you will create a new upgrade job and choose *Move to Production* as the Type of Upgrade. The Upgrade Assistant will then display only those steps needed for the move to production part of the upgrade. Give your upgrade job a name indicative of the move to production; for example, `<dbname>_mvtoprod1` (where `<dbname>` is your database name).

3. In the Application Server/Process Scheduler Configuration section, complete the following options:

Select the **Configuration Manager Profile** from the drop-down list.

Select the **Process Scheduler Name** from the drop-down list.



**For information** about Process Scheduler, refer to *PeopleSoft Installation and Administration*, for your database platform.

---

Enter your **Application Server Machine Name**. This is the actual server name on which the application server resides.

Enter your **JSL Port** (the Jolt Listener Port needed for the component interface).

Enter the FTP information. If you run Application Engine processes on the Server, the Upgrade Assistant needs to FTP those log files to the Client. Here you need to define the **FTP Server Output Directory** for that output, a valid **FTP User ID**, and the **FTP User Password** that can be used to FTP those files from the Server to the Client. At that point, the Upgrade Assistant performs Error Checking on those logs, determining whether the process failed or completed successfully.

4. Select the **Application Engine Run Location**. This option sets all Application Engine steps, located in the Template, to a default Run Location. By clicking the reset button, all Application Engine steps will be set to your choice of the following options:

Set All AE Tasks to run on the Server

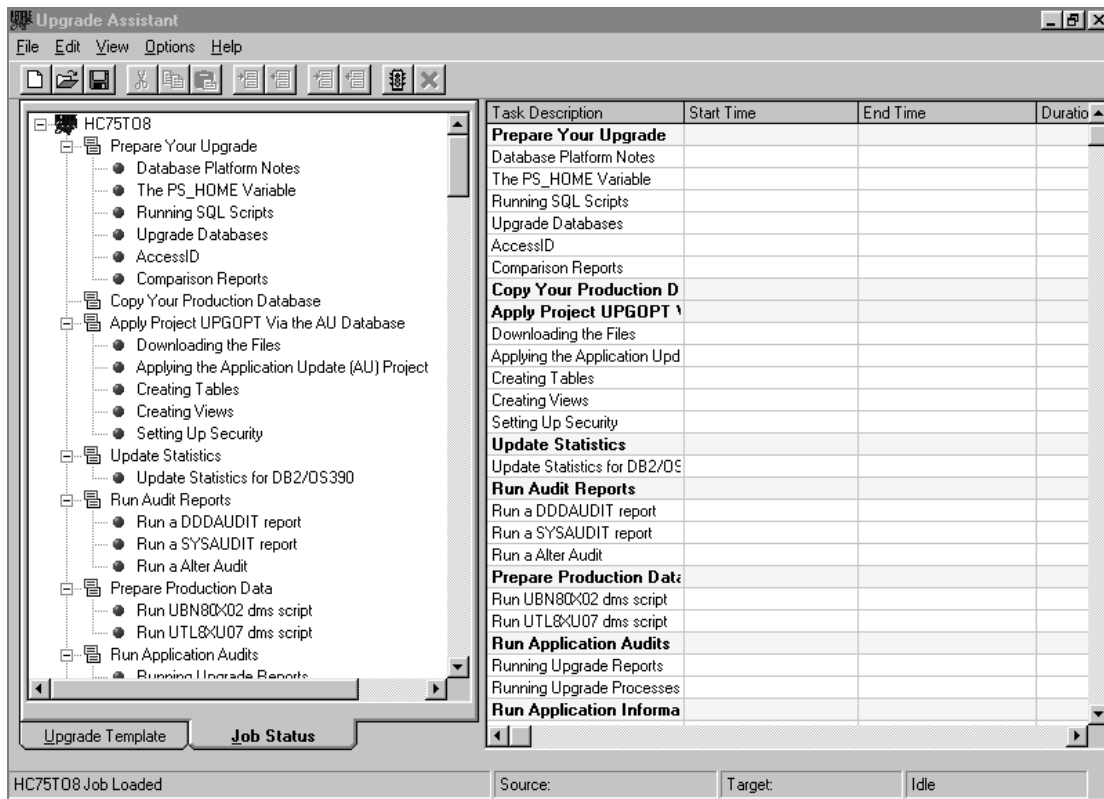
Set All AE Tasks to run on the Client

---

## Completing the Configuration

Select **OK** on the Database Configuration dialog box. Your database configuration properties are now complete.

The Upgrade Assistant reappears with the steps that apply to your upgrade, as shown in the example below:



## View the Documentation

You can select the option to view the documentation, relevant to the current step, in the Job Status view. You may want to view the documentation as you run the upgrade process.



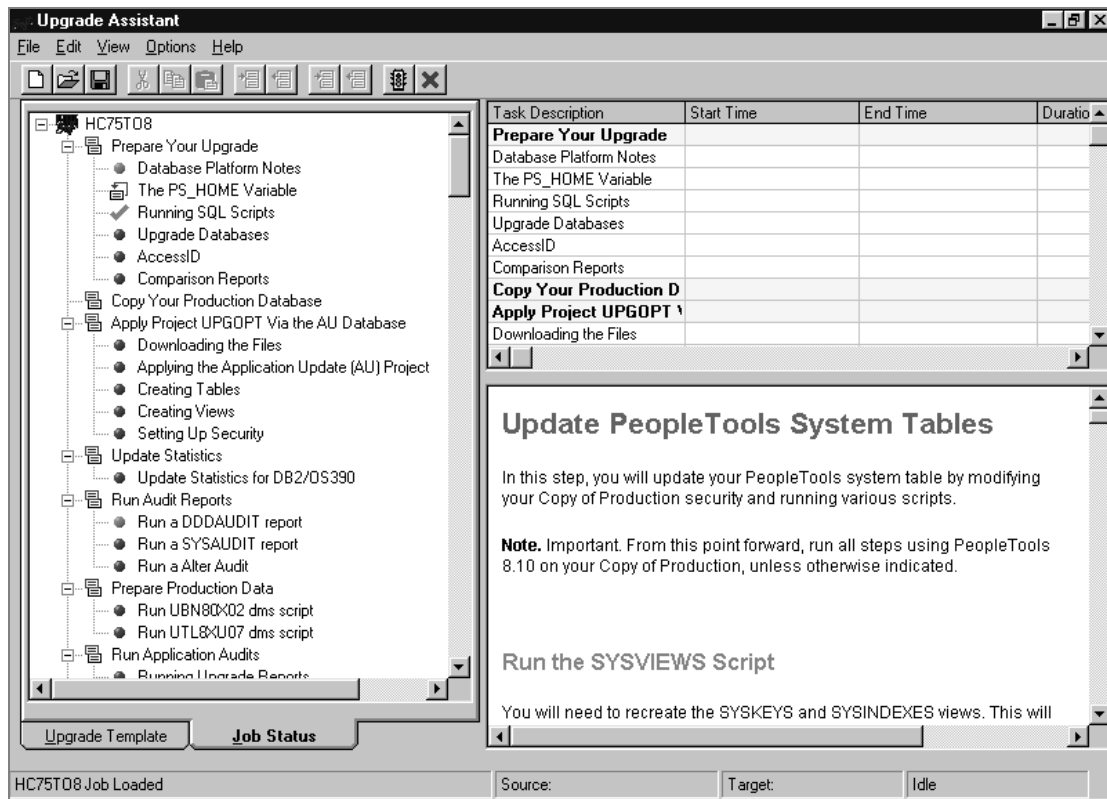
To view documentation, you must have the documentation directory set on the Upgrade Template tab.



For more information, see Set the Documentation Directory.

To view the documentation:

1. On the Upgrade Assistant toolbar, select **View, Documentation**.
2. The Upgrade Assistant displays the documentation in the Documentation Window, as in the example below:



## Review the Job Status

Before you run your upgrade job, review the status for each step. These steps automatically inherit a *Run* or *Manual* — *Stop* status based on your assigned step properties.

The run status is displayed, next to the step, with the following symbols:

Name	Symbol	Description
Run		This green icon indicates that the Upgrade Assistant will run this step or process.
Stop		This red icon indicates that the Upgrade Assistant will stop on this process.
Restart		Indicates a restart process. The Upgrade Assistant will stop on these processes and you will have to restart the Upgrade Assistant after you complete the manual process.
Processing		Indicates that the process is running.
Error		Indicates an error.
Complete		Indicates that the step is complete.



**Note.** You can change the job status of any step by selecting a job status on the Edit menu or by right-clicking on the step, then selecting the new job status.

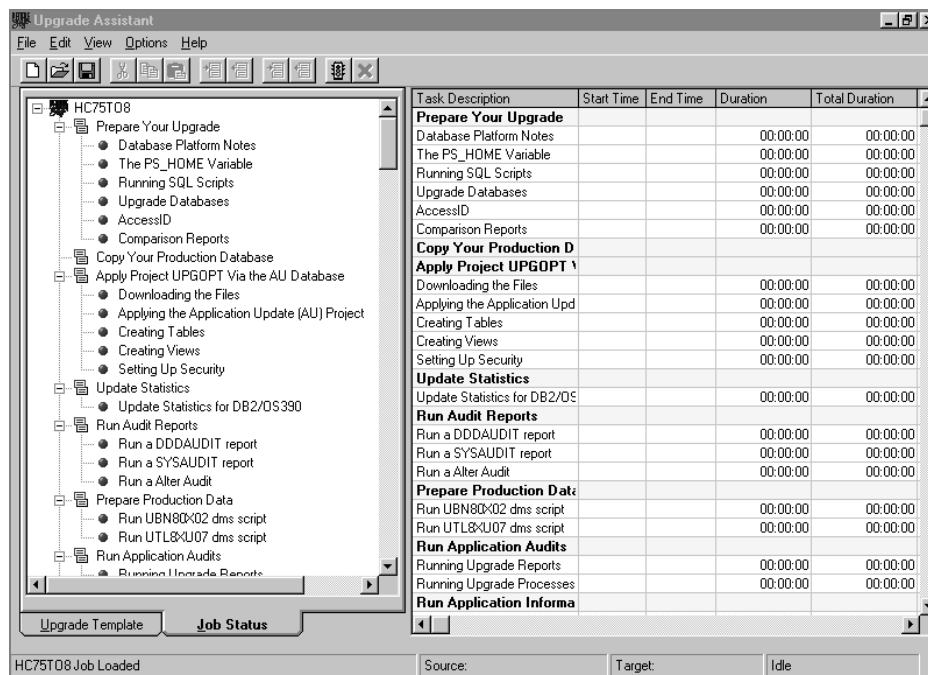
## Run the Upgrade Job

Once you have created your upgrade job, you can run the upgrade process.



**Note.** You should still be on the Job Status view.

A typical upgrade job may look as follows:



The upgrade steps are set to automatically run or stop. If the step type is *Manual - Stop*, then those steps are displayed with the Stop symbol. You will need to perform those steps manually. If a step is set to run, then those steps are displayed with the Run symbol.

### Perform a Manual - Stop Step

A *Manual - Stop* step is a step you must perform manually.

To perform a manual - stop step:

1. Perform the manual step (for example, "Database Platform Notes").

2. Once you have completed a *Manual - Stop* step, change the status to **Complete** by selecting **Edit, Complete**. For example, for the task titled "Database Platform Notes" you can change the status to **Complete** after you have finished reading the database platform notes.



**Note.** The Upgrade Assistant performs the steps in order. You can perform *Manual — Stop* steps, until you encounter a *Run* step. The Upgrade Assistant then performs the series of *Run* steps, and continues performing the *Run* steps until it encounters another *Manual — Stop* step.

## Run an Upgrade Step

Once you have completed the necessary manual steps, the Upgrade Assistant can start the *Run* process for you.

To start the run process:

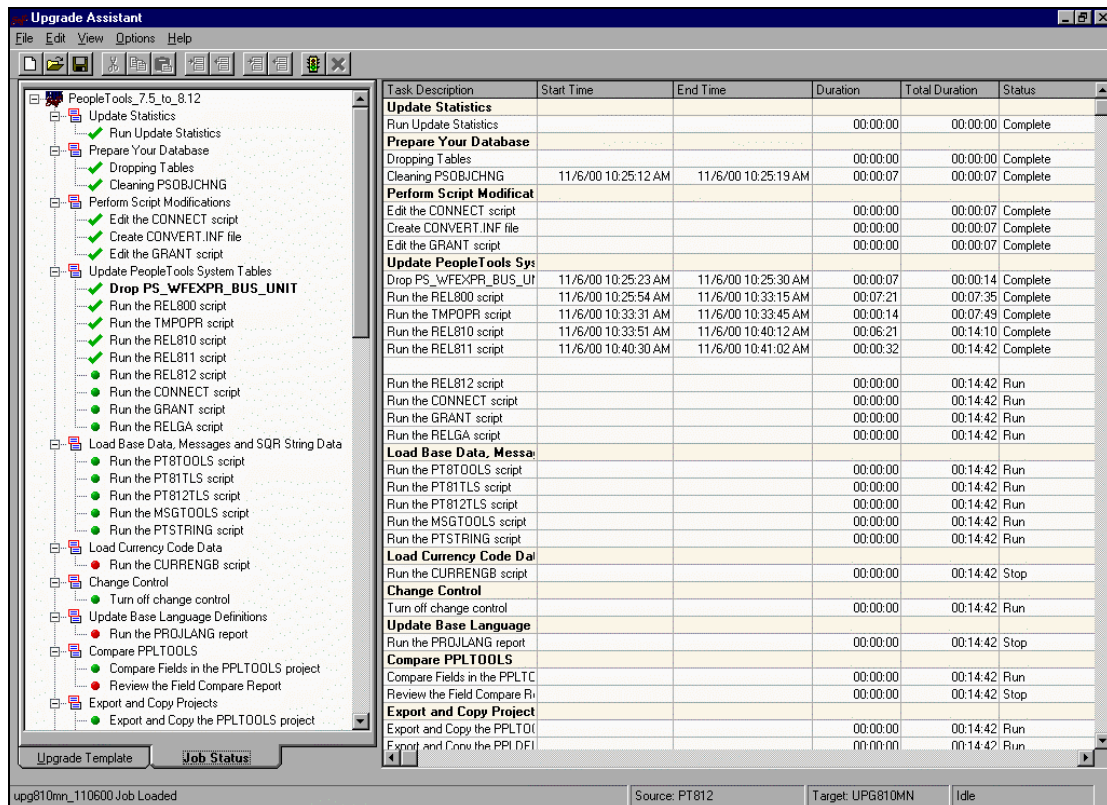
1. Highlight the upgrade step you wish to run.
2. Select **Edit, Run** (you can also select the run icon on the Upgrade Assistant toolbar).

The Upgrade Assistant starts the *Run* process. The Run icon changes to the *Processing* icon. The status column changes to *Processing*. The Start Time column indicates the time the job started.

The Upgrade Assistant displays these indicators until the step is complete.

When the step is complete, the status column displays *Complete* and the Run icon changes to the *Complete* icon. The Upgrade Assistant displays the End Time and Duration in the status grid, as shown in the example below:





The Upgrade Assistant runs your next step and continues running steps until it fails or finds a step with a Stop status.

3. When you have finished the run process, **save** your upgrade job.

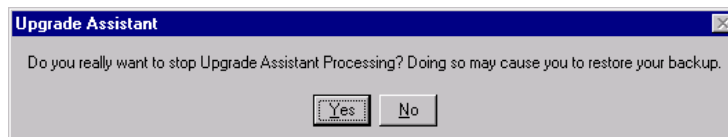
## Cancel a Running Upgrade Step

You may need to cancel a step during the run process.

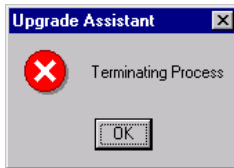
To cancel a running upgrade step:

1. Click the **Cancel** button on the Upgrade Assistant toolbar.

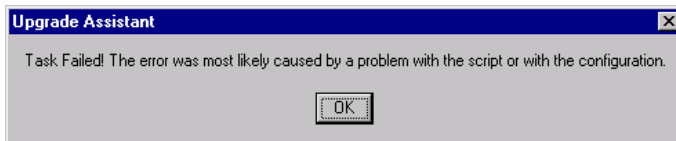
The Cancel button (represented by an X) is located on the right side of the toolbar. When you select Cancel, the Upgrade Assistant displays the following dialog box:



2. Select **Yes** to cancel the run process or **No** to continue the Run process. If you select **Yes**, the Upgrade Assistant displays the following dialog box:



3. Click **OK** to continue terminating the process. The following dialog box appears:



Because the step did not complete, the Upgrade Assistant marks the step as failed.

## View the Log File

This option enables you to view individual log files and output generated by the Run process.

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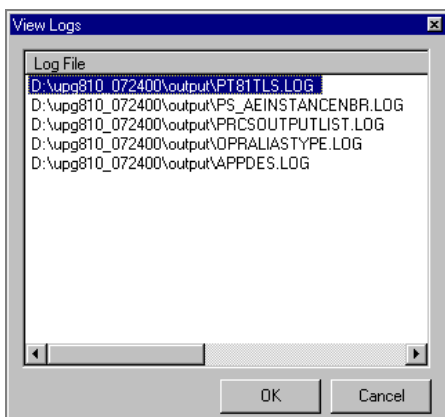
### Viewing the Log File for SQR Reports and Data Mover Scripts

You can view the log file for SQR reports or Data Movers scripts.

To view the log file for SQR reports and Data Mover scripts:

1. On the Job Status toolbar, select **Edit>View Log**.

The Upgrade Assistant displays the following dialog box:



2. Select the log file you wish to view.
3. Select **OK**.

The Upgrade Assistant displays the log file.

---

## Viewing the Log File for All Other Processes

In this task, you can view the log file for all processes except SQR reports and Data Mover scripts.

To view the log file for all other processes:

1. On the Job Status toolbar, select **Edit>View Log**.
2. The Upgrade Assistant displays the log file in Notepad.



## CHAPTER 5

# Configuring and Editing Options

In the previous chapters, you learned how to load the upgrade template, configure step properties, create an upgrade job, and configure your database. In this chapter, you will learn how to create a new upgrade template and configure and modify options in your upgrade template.

## Create a New Upgrade Template

You can create a custom template for your upgrade, insert tasks and steps, specify step properties, and configure your database options.

---

### Creating the New Template

You can create an entirely new upgrade template.

To create a new upgrade template:

1. Open Upgrade Assistant.
2. Select the **Upgrade Template** view.
3. Select File, New Upgrade Template.

The New Upgrade Template dialog box appears:



4. Enter the name of your new template.
5. Select **OK**.

The Upgrade Assistant displays the name of your new template in the Template Tree. Now you can insert tasks, insert steps, and assign step properties for your new template.

---

## Inserting Tasks

Now that you have created your new template, you will need to insert tasks. A task is a section heading for a group of steps.

To insert tasks:

1. Highlight the location where you want to add the task. If this is the first task in your new template, highlight the top node (template name) at the top of the Template Tree.
2. On the Upgrade Assistant toolbar, select **Edit, Insert Task**.

The New Task dialog box appears, as follows:



3. Enter a unique name for your new task.
4. Select **OK**.

---

## Inserting Steps

After you have created your new template and inserted the tasks, you can insert steps. A step can be any script, application engine process, etc., you want to add.

To insert steps:

1. Highlight the task where you want to add your new step.
2. From the Upgrade Assistant toolbar, select **Edit, Insert Step**.

The Insert Step dialog box appears:



3. Enter a unique name for your new step.
4. Select **OK**.

The Upgrade Assistant invokes the Step Properties dialog box.

5. Now, you can define the step properties for your new template.



For more information, see Define Step Properties.

---

6. Continue creating steps until your template is complete.
7. If you would like to create an upgrade job for this template, select the Job Status view.



For more information, see Create the Upgrade Job.

---

## Add a Task or Step to an Existing Upgrade Template

If you have made customizations to your upgrade, you may want to add tasks or steps to your existing upgrade template to reflect your customizations. You can add a task as a section head in your template, then add steps to reflect the actual customizations you have made to your upgrade.

---

### Adding a Task to an Existing Upgrade Template

When you add one or more tasks to an existing upgrade template, the task serves as a section head for upgrade steps. After creating a new task, you can add steps to the task.

To add a task to an existing upgrade template:

1. Open Upgrade Assistant.
2. Select the **Upgrade Template** view.
3. Select **File, Open** and choose your template.
4. Highlight the location where you want to insert a task.
5. Select Edit, Insert Task.

The New Task dialog box appears, as follows:



6. Enter a unique name for your new task.
7. Select **OK**.
8. The upgrade template reappears and displays your new task.

9. **Save** your template.

---

## Adding a Step to an Existing Upgrade Template

When you add one or more steps to an existing upgrade template, you must define step properties and database configuration options for your new steps.

To add a step to an existing upgrade template:

1. Make sure you are on the Upgrade Template view in the Upgrade Assistant.
2. Highlight the task where you want to add your new step.
3. Select **Edit, Insert Step**. The New Step dialog box appears:



4. Enter a unique name for your new step, then select **OK**.

The Upgrade Assistant invokes the Step Properties dialog box.



For more information about assigning step properties, see the Define Step Properties.

---

5. **Save** your template.

## Delete a Task or Step

You may want to delete a task or step from your upgrade template.

To delete a task or step:

1. Open Upgrade Assistant.
2. Select **File, Open** to choose your template.
3. Highlight the task or step you want to delete.



**Important!** If you delete a task, the Upgrade Assistant deletes all the steps within the task.

---

4. Select **Edit, Delete Task** or **Edit, Delete Step**.



5. The Upgrade Assistant deletes the task or step and updates the template.
6. **Save** the template.

## Rename Tasks and Steps

You can rename a task or step in an existing upgrade template.



**Important!** If you rename an existing task or step in a PeopleSoft-delivered Upgrade Template, you will lose the link to the Documentation Window for that task or step.

---

To rename a task or step:

1. Open Upgrade Assistant. Make sure the Upgrade Template view is selected.
2. Select **File, Open** and choose your template.
3. Highlight the task or step you want to rename.
4. Select Edit, Rename.
5. Type in your new task or step name.
6. Save your template.

## Edit Your Database Configuration

You can modify the database configuration options you set for your upgrade steps.

To edit your database configuration:

1. Open Upgrade Assistant.
2. Select the **Job Status** view.
3. Select **File, Open Upgrade Job** and select your upgrade job.
4. Highlight the step you want to modify and select **Options, Database Configuration**.

The Upgrade Assistant displays the Database Configuration dialog box.

5. Modify your selected options.



For more information about Database Configuration options, see Create the Upgrade Job.

---

6. When you are finished modifying your database configuration options, select **OK**.

The Upgrade Template reappears in Job Status view.

7. Save your template.

## Specify Settings

Using the Upgrade Assistant command on the Options menu, you can specify general settings for your upgrade template. You can access the Options, Upgrade Assistant menu from the Upgrade Template view or the Job Status view.

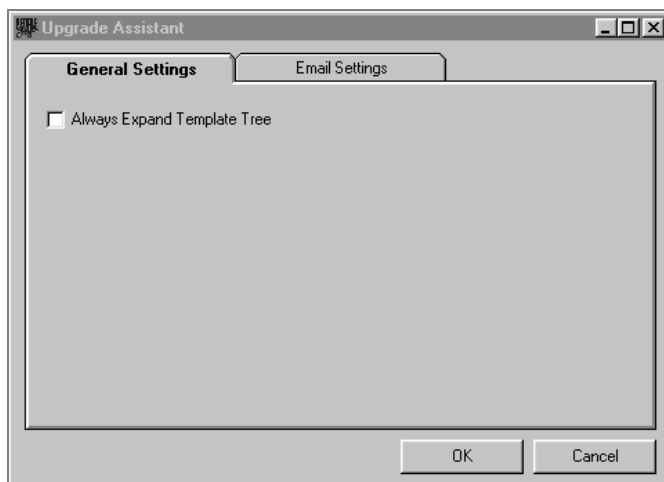
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### Specifying General Settings

When you load your upgrade template, the Upgrade Assistant displays the tasks only. You can configure the General Settings dialog box to automatically display the steps, within a task, in the Tree Structure of your upgrade template. Setting the steps to display when you open your upgrade template is helpful for defining your step properties.

To specify general settings:

1. Open Upgrade Assistant.
2. Select Options, Upgrade Assistant.
3. The Upgrade Assistant dialog box appears.
4. Select the **General Settings** tab, as follows:



5. Select Always Expand Template Tree.
6. Select **OK**. The Upgrade Template reappears with the Tree Structure expanded to display tasks and steps.

7. **Save** your template.

---

## Specifying Email Settings

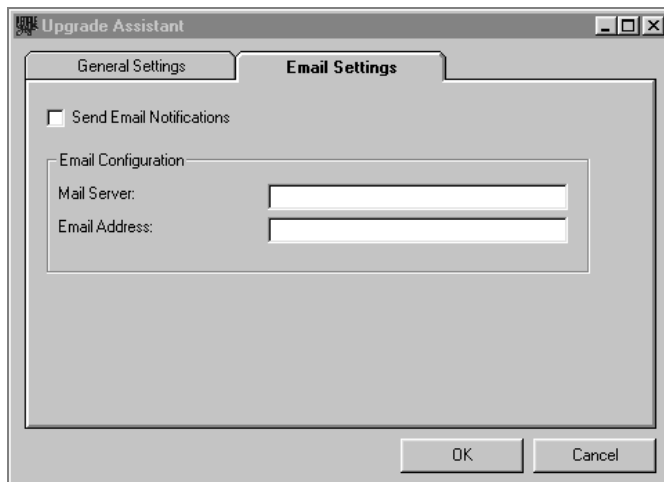
On the Task Properties dialog box, you decided whether to allow for errors or not during the upgrade process. If you selected *No* to the *Allow for Errors* option, you may want to configure the Upgrade Assistant to notify you, by email, if it encounters an error during the upgrade process. You can set the Email Settings dialog box to notify you of any errors encountered during the upgrade process.

To specify email settings:

1. Open the Upgrade Assistant.
2. Select Options, Upgrade Assistant.

The Upgrade Assistant dialog box appears.

3. Select the **Email Settings** tab.



4. Select the **Send Email Notifications** checkbox if you want the Upgrade Assistant to notify you of any errors encountered during the upgrade process.
5. Under Email Configuration, enter your **Mail Server** and **Email Address**.
6. Select **OK**.

The Upgrade Assistant will notify you of any errors encountered during the upgrade process.

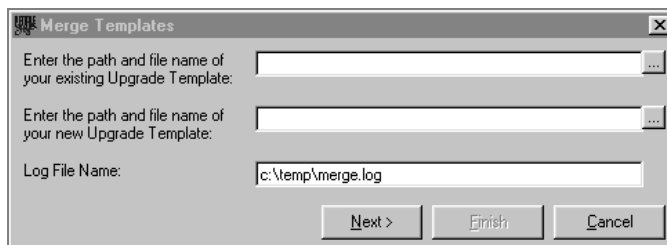
## Merge Templates

After the initial release of an upgrade template, it may be necessary for PeopleSoft to release a maintenance template for your particular upgrade product.

This option enables you to merge your existing template with a new PeopleSoft-delivered maintenance release template.

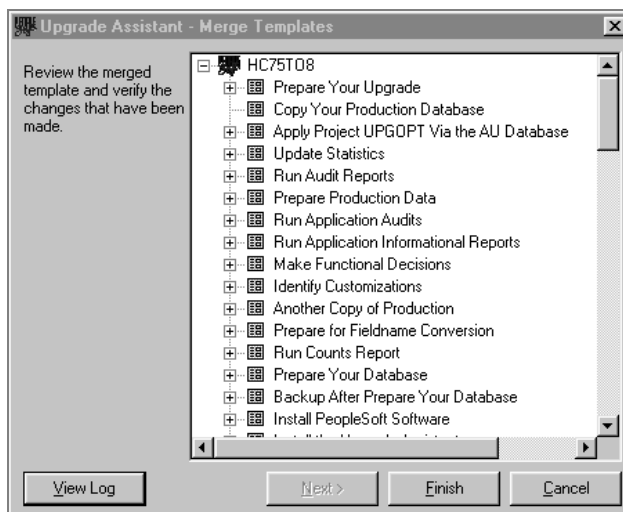
To merge templates:

1. Select **Options, Merge Templates**. The Merge Templates dialog box appears:



2. Enter the path and file name of your existing Upgrade Template. This is the path you selected when you installed your upgrade template.
3. Enter the path and file name of your new Upgrade Template.
4. You can accept the default **Log File Name** or specify a different log file name.
5. Select **Next**.

The Upgrade Assistant merges the two templates. It then displays the new merged template, as in the example below:



6. Select **View Log**. The View Log lists steps that were deleted, customized steps that were replaced, and steps that were added in the merge process. Review the log to ensure that your merge changes are complete.
7. Select **Finish**. The Upgrade Assistant returns you to the Upgrade Template view.

## CHAPTER 6

# Understanding Types and Options

This chapter describes the process types and upgrade options available in the Upgrade Assistant.

## Understanding Process Types

In the upgrade process, you assign a process type for each step in your upgrade. This provides the Upgrade Assistant with information necessary to complete the step. The following describes each process types and what each process type will do for your upgrade.

The Upgrade Assistant contains the following process types:

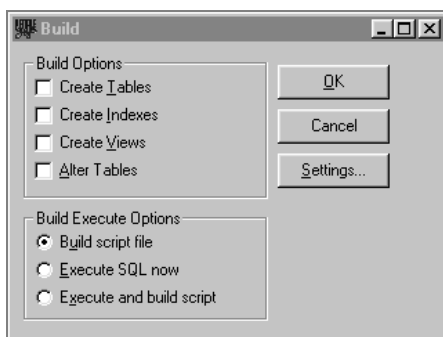
<i><b>Process Type</b></i>	<i><b>Definition</b></i>
Application Engine	This selection runs Application Engine processes in the Script/Procedure value under Step Properties. You can run your Application Engine process on the client, the server, or in parallel. You may need to adjust these to reduce the amount of time needed for the actual Move to Production part of the upgrade.
Build Project	This selection builds the project specified in the Task Properties parameter as #Project= (for example, #Project=ALLTABS). The project is built through the PeopleTools command line.
Custom Defined Process	This selection enables you to include custom added processes, such as Batch files, that you can run through the Upgrade Assistant. You need to start this process with <b>cmd / c</b> for the process to run; for example:  Cmd / c c:\backup.bat
Convert Application Engine	This selection converts Application Engine processes to the release 8.10 format (GUI processes).

<b>Process Type</b>	<b>Definition</b>
Convert Fieldnames	This selection converts FieldNames to the PeopleTools release 8.10 format (GUI processes).
Convert PeopleCode	This selection converts PeopleCode programs to support the newly-supported Unicode format (GUI processes).
Convert Workflow	This type converts Workflow objects to the PeopleTools release 8.10 format.
Create Project	This type enables you to select the type of records to insert into a project.
Data Mover — User	This type runs Data Mover scripts as the User ID specified in the Database Configuration (non-bootstrap mode).
Data Mover — Bootstrap	This type runs Data Mover scripts as the Access ID specified in the Database Configuration (bootstrap mode).
Manual — Stop	This type is defined as a task you must run manually. The Upgrade Assistant automatically sets the run status to <i>Stop</i> . Once you have manually completed the step, you need to change the Job Status to <i>Complete</i> .
SQL Command	This type runs the SQL command defined in the Parameters value under the Step Properties. The Upgrade Assistant runs the command using the SQL Query tool specified in the Database Configuration dialog box. For most SQL Query Tools, the Upgrade Assistant will stop on error.
SQR Report	This type runs SQRs using the pssqr command line.
SQL Script	This type run the SQL script defined in the Script/Procedure value under the Step Properties. The Upgrade Assistant runs the script using the SQL Query tools specified on the Database Configuration. For most SQL Query Tools, the Upgrade Assistant will stop on error.

<b>Process Type</b>	<b>Definition</b>
Upgrade Compare	This type runs the Upgrade Compare Process using the project specified in the Step Properties parameter as #Project= (for example, #Project=ALLTABS). You can modify the Upgrade Compare Options (for example, the Report Filters) through the Upgrade Assistant. The Upgrade Assistant uses the options, from the Upgrade Compare, when running the process (GUI process).
Upgrade Copy	This type runs the Upgrade Copy Process using the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS). You can modify the Upgrade Copy options (for example, Language options or Objects to Copy) through the Upgrade Assistant. The Upgrade Assistant uses the options, from the Upgrade Copy, when running the process (GUI process).

## Understanding Build Options

The Build Options dialog box enables you to choose the build options, build execute options, and settings for your build project. When you select certain Types on the Task Properties dialog box, the Build dialog box appears, as follows:



You use the Build dialog box to create or run the SQL scripts that define the underlying database components.

---

## Selecting Build Options

The Build Options group enables you to specify what action you want to occur; Create Table, Create Indexes, Create Views, or Alter Tables.

- **Create Tables.** Select this option to create tables for your build project. When you select this

option, then, by default, *Create Indexes* will automatically be selected. You cannot deselect *Create Indexes* if you select **Create Tables**.

- **Create Indexes.** Select this option to create indexes for your build project.
- **Create Views.** Select this option to create views for your build project.
- **Alter Tables.** Select this option to alter existing tables. When you select this option, then, by default, *Create Indexes* will automatically be selected; however, using this option, you **can** deselect *Create Indexes*.



You can select **Create Tables** and **Alter Tables** to run concurrently as long as the **Skip table if it already exists** option is enabled on the **Create** tab in the **Build Settings** dialog. Otherwise, there would be no way to determine whether you wanted to alter or recreate a table that already exists.

---

## Selecting Build Execute Options

In this part of the Build dialog box, you can select certain conditions to execute your build process. To run the SQL script file that the Build process generates, you must use a third party SQL interpreter, such as Oracle's SQL \*Plus or Microsoft ISQL/W. Most database vendors include a native command processor that you can run on the client or the server.

This dialog box contains the following Build Execute Options:

- **Build script file.** When you select this option, you can review and update the SQL prior to executing the script. This option is automatically selected for altering tables.
- **Execute SQL now.** When you select this option, you do not have to invoke another program to run the SQL; the SQL runs as part of the Build process. However, when you select this option, you don't have the opportunity to review the SQL prior to the SQL committing to the database.
- **Execute and build script.** When you select this option, the SQL is executed as part of the Build process, and the SQL script is saved so you can review it.



**Note.** You cannot run Build scripts through Data Mover. The scripts may contain syntax specific to your database platform that Data Mover is not designed to process.

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## Choosing Build Settings

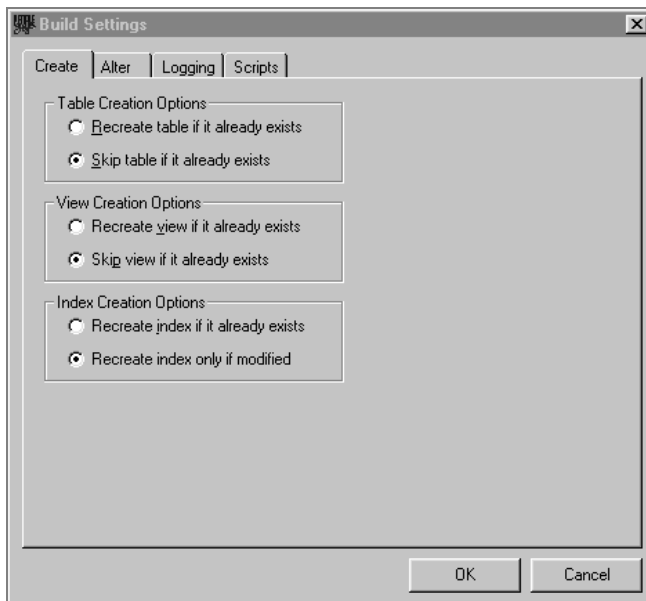
You can invoke the Build Settings dialog box to view or change your build options. The Build Settings dialog enables you to customize various aspects of the build process. Depending on which build option you are running, your build settings will vary. The settings you chose are stored on your workstation, so that you can re-use them during future Application Designer



sessions. When you select the Settings push button, the Upgrade Assistant invokes the Build Settings dialog box. You can use this dialog box to create and alter tables, set view and index creation options, set log output directories, and set script output directories.

## Create Tab

When you select the **Create** tab on Build Settings dialog box, the following appears:



The Create tab enables you to specify table creation, view creation, or index creation settings.

### *Table Creation Options*

These options determine when a table should and should not be created. You can select one of the following options:

- **Recreate table if it already exists.** This option always drops and recreates a table if it already exists. Use this option with care; if there is any data in the table that already exists, it will also be dropped. If you don't want to retain the data in the tables, then this option is faster than performing an alter.
- **Skip table if it already exists.** This option creates only those tables that are newly defined. If you want to preserve the data already residing in existing tables or you want to create new tables, select this option.

The default setting is *Skip table if it already exists*.

### *View Creation Options*

The following options are available for view creation:

- **Recreate view if it already exists.** Since views are logical views of data, you can safely use

this option; you don't run the risk of losing physical data. Using this option ensures that all views in the project are rebuilt, whether they need to be or not.

- **Skip view if it already exists.** Choose this option if you only want to create views that don't already exist in the database. This option is useful if you want to run the Build Project on a large project and only a subset of the views in the project need to be created. This takes less time than recreating all the views in the project.

The default setting is *Skip view if it already exists*.

### ***Index Creation Options***

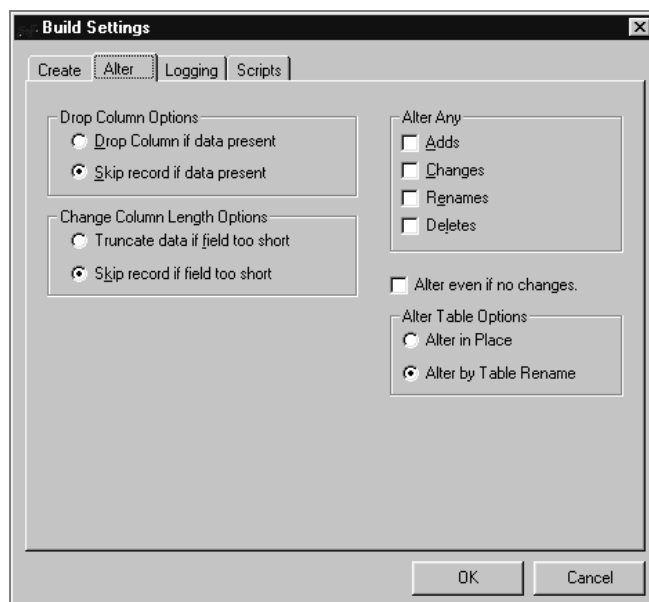
These options determine when an index should be recreated. You can select one of the following options:

- **Recreate index if it already exists.** Select this option when you want to drop and recreate all of the indexes for your build.
- **Recreate index only if modified.** Select this option if you want to have an index recreated only if the index definition in the PeopleTools tables is different from the physical index.

The default setting is *Recreate index only if modified*.

## **Alter Tab**

When you select the **Alter** tab on the Build Settings dialog box, the following appears:



Using the options on the Alter tab, you can select column options, column length options, and alter options for your build project.

### ***Drop Column Options***

Drop Column Options are referenced whenever a field is deleted from a PeopleTools record definition and data exists in the database for that column. You can select from one of the following options:

- **Drop Column if data present.** If you select this option, the column and data will be dropped and a warning will be written to the build log.
- **Skip record if data present.** If you select this option, the alter for that record is aborted and an error message will be written to the log. Processing continues with the next record.

The default setting is *Skip record if data present*.

### ***Change Column Length Options***

Change Column Length Options are used whenever the length of a character column is reduced in PeopleTools and an alter could result in data truncation. You can select from one of the following options:

- **Truncate data if field too short.** If you select this option, and the alter could result in data truncation, then the record is altered and a warning message is written to the build log.
- **Skip record if field too short.** If you select this option, then the alter for the record is aborted and an error message is written to the build log. Processing continues with the next record.

The default setting is *Skip record if field too short*.

### ***Alter Any***

Alter Any enables custom alter processing for Adds, Changes, Renames, and Deletes. These options refer to recfields (adding a field to a record, changing a field on a record, renaming a field, or deleting a field from a record).

### ***Alter Even If No Changes***

This checkbox forces an alter, even if no changes are made to the tables. The check box is not checked by default.

### ***Alter Table Options***

You can select from the following options:

- Alter in Place
- Alter by Table Rename

The default is Alter In Place. With *Alter In Place*, ALTER SQL statements are used to make the necessary changes to the tables, such as adding, deleting, redefining, or renaming columns. For database platforms where *Alter in Place* is not supported, the alter will automatically be done by **Alter by Table Rename** (even if the checkbox is not set to that

option). By selecting **Alter by Table Rename**, a temporary table is created using the new record definition and the data from the original table is inserted into the temporary table. The original table is then dropped and the temporary table is renamed to the original table.

## Logging Tab

When you select the **Logging** tab on the Build Settings dialog box, the following appears:



One way that you can monitor the build process is to review the log files that the build process automatically generates. Keep in mind that the log file is entirely separate from the script file. How much information the log file contains is up to you. You can set your logging option so that all status appears in the log, or you can specify that only the errors or warnings appear in the log.

### *Logging Level*

Select one of the options in the **Logging Level** group to specify the detail of information that you want in your Build log output. If you are only interested in the operations that failed, then select **Fatal errors only**. You can add warnings to that mix by selecting **Fatal errors and warnings**. If you want to see everything that processed successfully and all of the errors and warnings, then select **Fatal errors, warnings, and informational messages**.

### *Logging Output*

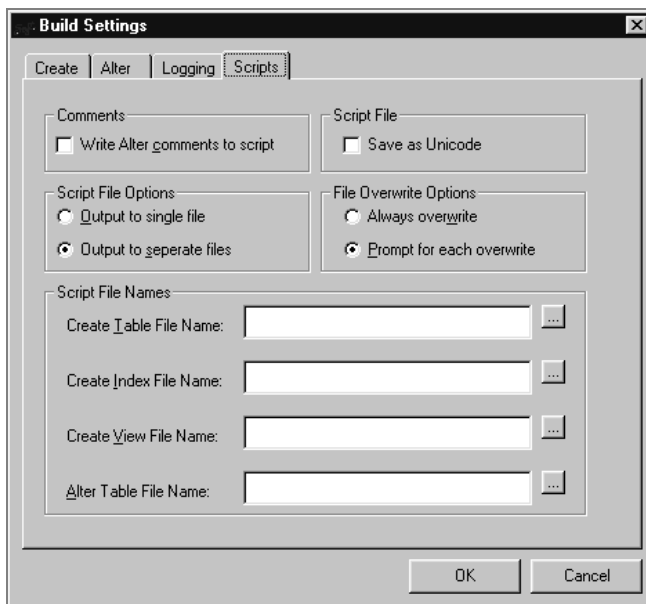
The Logging Output group enables you to specify where, and in what form, you would like to view your log output. You have the following options:

- **Log to output window.** This option writes the same information that would appear in the log file to the Application Designer Window. Always be aware of the level that you've selected. If there is a lot of detail (high logging level plus many records to process) it may be easier to print the logging information to a file, and print it later.

- **Log to file.** This option writes the log to a file. If you select this option, you can specify a custom location and name for your log file in the Log file name edit box. If you do not select this option, the edit box will be disabled.
- **Log settings.** This option writes all of the runtime options to the log. Should it be necessary to report a problem with the Build process or to troubleshoot, it is important to know the settings that were active.
- **Log file name.** This option enables you to specify a custom location and name for your log file. This option is available only if you select the **Log to file** option.

## Scripts Tab

When you select the **Scripts** tab on the Build Settings dialog box, the following appears:



If you choose to build a script file, then the build process generates a script file containing all of the Create and/or Alter SQL statements, so that you can review them prior to running the SQL through another SQL command processor.

### Comments

This field enables you to **Write Alter comments to script**. This check box is simply a switch that enables you to either include or suppress alter comments.

### Script File

The default for the **Save as Unicode** checkbox is set, based on the combination of the UNICODE/ANSI build and the UNICODE/ANSI database. This checkbox is enabled only when using MSSQL Server and Oracle databases. For all other platforms, the checkbox is permanently disabled, since the script files will always be ANSI.

### *Script File Options*

If you want all of your Create Table statements written to one SQL script file and your Create Index statements to another, then select the **Output to separate files** option. If you prefer to have all your statements (Create, Alter, etc) contained in a single file, then select the **Output to single file** option.

### *File Overwrite Options*

This option indicates whether you want to automatically overwrite or be prompted before script files are overwritten. Your personal preference determines which technique you employ. If you don't mind have your previous builds overwritten, then select **Always overwrite**. If you are more comfortable being alerted when a script is about to be overwritten, then select **Prompt for each overwrite**.

### *Script File Names*

The options available to select in the **Script File Names** group box depend on your selection in the Script File Options group.

- **Output to Single File**

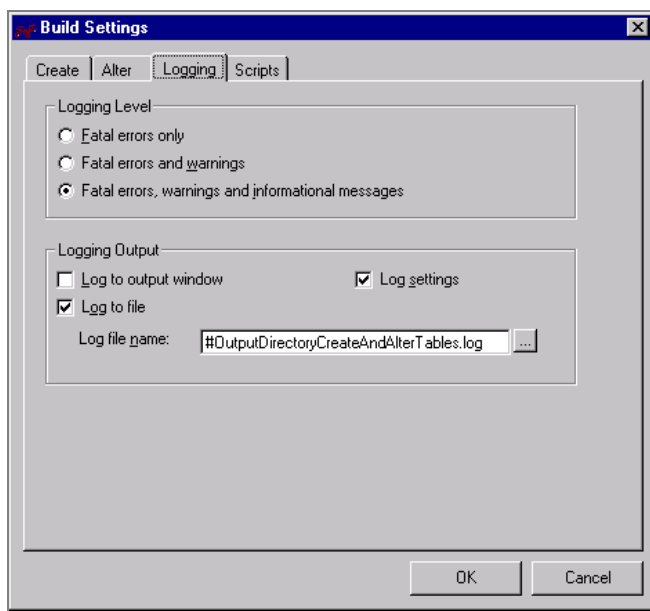
When you have **Output to single file** selected in the **Script File Options** group, just one edit box appears in the Script File Names group box; **All Output File Name**.

- **Output to Separate Files**

If you have Output to separate files selected in the Script File Options group, the following four edit boxes appear—one for each build option—in the Script File Names group box:

- Create Table File Name
- Create Index File Name
- Create View File Name
- Alter Table File Name

Instead of hard-coding the output paths, you can use the Upgrade Assistant parameter *#OutputDirectory* or *#InputDirectory* to dynamically set the script and log directories, as in the example below:



For more information about build options, see Building SQL Tables and Views in *PeopleTools Application Designer*.





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