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PeopleSoft Enterprise Performance Management 8.8x to 9.0 Upgrade

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PeopleSoft Enterprise Performance Management 8.8x to 9.0
Upgrade
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About This Documentation

Understanding This Documentation

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

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

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts).

Audience

This documentation assumes 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 onsite experience.

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).
- The World Wide Web.
- Microsoft Windows or Windows NT graphical user interface.

PeopleSoft recommends that you complete training before performing this upgrade.

See PeopleSoft Customer Connection (Oracle University).

Organization

This documentation is divided into chapters, each containing tasks that represent major milestones in the upgrade process:

- Prepare Your Database

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- Apply PeopleTools Changes
- Run and Review Compare Reports
- Apply Application Changes
- Complete Database Changes
- Apply Changes to Production Database

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

Related Information

PeopleSoft provides additional information that may help with your upgrade. The following information (as well as updates to our upgrade) is available on PeopleSoft Customer Connection:

- *PeopleSoft Release Notes.* Before you begin your upgrade, read the PeopleTools and PeopleSoft application release notes to determine what has changed in the system and to familiarize yourself with the new features in this release. The release notes also indicate whether you need to upgrade other portions of your system, such as your RDBMS software or batch files.
- *Upgrades Documentation.* The upgrade documentation on PeopleSoft Customer Connection contains information posted after shipment of this release that may not be included in these upgrade instructions. This information may include updates and fixes required at upgrade. Always check the upgrade documentation for the most current documentation and information.
- *Getting Started on Your PeopleSoft Upgrade*. Before beginning a PeopleSoft upgrade, you must complete the tasks in the document *Getting Started on Your PeopleSoft Upgrade*. This document guides you through planning your upgrade as well as installing the software necessary to upgrade to the next PeopleSoft release. If you did not complete the tasks in this documentation, do so now.

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

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts, Release, Enterprise).

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CHAPTER 1

Prepare Your Database

This chapter discusses:

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

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Understanding Database Preparation

You must make a copy of your production database before you start preparations for the technical portion of the upgrade. Unless otherwise noted, run these tasks on your Copy of Production database (not the New Release Demo database). These tasks do not use the new PeopleSoft release. You should use your current codeline and current 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 1-1: Understanding Your Upgrade

This section discusses:

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

Understanding PeopleSoft Upgrades

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

Task 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,* “Install the Software Release.” Verify that the following tasks are complete:

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

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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 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 you are currently using.

Properties

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

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

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

- Performance Recommendations

  Before beginning your upgrade, you should plan for performance issues.

  See Appendix: “Improving Performance.”

- Enterprise Warehouse Operational Data Store Support

  This policy governs the upgrade policy for the Enterprise Warehouse Operational Warehouse - Staging (OWS) and Multidimensional Warehouse (MDW). This policy is subject to change for future releases.

  The OWS is designed to be transient by nature, so the requirements for maintaining specific table structures for the storage of historical data do not exist. Therefore, the optimal migration path for the new release of the OWS will require the implementation of the current version of the OWS and then a reloading of the data.

  PeopleSoft will *not* support the upgrade of the OWS between versions of the Enterprise Warehouse for the following reasons:

  - The OWS is designed as a staging area for the Enterprise Warehouse to support analytical reporting and analytic applications.

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- The current release of the OWS is built to reflect the associated releases of the core applications—that is, to reflect the releases of PeopleSoft HCM, PeopleSoft FSCM, PeopleSoft CRM, and so on.

- Microsoft SQL Server 2000 Column Statistics

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

Properties

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

Task 1-2: Copying Your Production Database

This section discusses:

- Making a Copy of Production Database
- Increasing Database Space

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

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

Note. Move to Production: This is a second Copy of Production sometimes referred to as the New Copy of Production. The first Copy of Production, or “old” Copy of Production, will now be the source database (it was the target database in the initial test pass). The second, or “new” Copy of Production, is now the target database.

Properties

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

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Task 1-2-2: Increasing Database Space

To prepare for the upgrade, you may need to increase the space allocated to your Copy of Production database. Depending on your relational database management system (RDBMS), this may include allocating space to tablespaces or allocating database primary space and log files. Be aware that your new environment needs to accommodate both the existing data in your Copy of Production database as well as the new data, new data structures, and new database objects. Every site and configuration is different, so PeopleSoft 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 DBA to ensure that your environment is set up appropriately for both the initial and Move to Production passes.

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

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

Properties

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

Task 1-3: Applying Upgrade Planning Files

This section discusses:

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

Understanding Applying Upgrade Planning Files

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

Task 1-3-1: Applying the UPGOPT Project

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

To apply the UPGOPT project:

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

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

Properties

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

Task 1-3-2: Building the UPGOPT Project

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

To build the UPGOPT project:

1. Using your current codeline, launch Application Designer and sign on to your Copy of Production database.
2. Select File, Open...
3. In the Definition drop-down list box, select Project and click Open to display the list of projects.
4. Select UPGOPT and click Open again.
5. Select Build, Project...
6. Under Build Options, select Create Tables, Create Views.
7. Click Settings...
8. On the Create tab, select Recreate View if it already exists and Recreate Table if it already exists.
9. On the Logging tab, select Fatal errors, warnings, and informational messages.
10. On the Scripts tab, select Output to separate files.
11. In the Script File Names box, give your scripts a unique name that reflects this task number and the object being created.
12. Click OK.
13. Under Build Execute Options, select Build script file.
14. Click Build.
15. Using the appropriate SQL query tool for your platform, run the scripts created in the step above.

    Run the scripts in the following order: Create Tables, Create Views, Create Indexes.

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Properties

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

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

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

To set up security:

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

Properties

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

Task 1-4: 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 below, then uncomment and modify all the DB2-specific statements to reflect your environment.

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

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

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

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

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

```
PUUPX07.DMS
```

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```
PUBCN01.DMS
PUBGN02.DMS
```

Properties

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

Task 1-5: 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.

See Appendix: "Improving Performance."

Properties

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

Task 1-6: Running Initial Audit Reports

This section discusses:

- Understanding Running Initial Audit Reports
- Run the Initial DDDAUDIT Report
- Run the Initial SYSAUDIT Report
- Create the INITALTAUD Project
- Run the Initial Alter Audit
- Review the Initial Audits

Understanding Running Initial Audit Reports

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

Task 1-6-1: Run the Initial DDDAUDIT Report

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

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In this step, DDDAUDIT is run using SQR from your current (old) release of PeopleSoft 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 Review the Initial Audits.

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

Properties

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

Task 1-6-2: Run the Initial SYSAUDIT Report

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

In this step, SYSAUDIT is run using SQR from your current (old) release of PeopleSoft 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 Review the Initial Audits.

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

Properties

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

Task 1-6-3: Create 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 the records with type *Table* in your system are audited. This project also includes any custom records that you created in your system.

Note. If your old PeopleTools release is 8.44 or later, this step can be automatically run by Change Assistant. To automatically run this step, open the step properties for this step in Change Assistant and change the type from ManualStop to CreateProject. Then run your job.

To create the INITALTAUD project:

1. Launch PeopleTools and sign on to the Target database.
2. From Application Designer, select File, New…
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project...

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5. Select Records from the Object Type drop-down list box.
6. Select Table from the Type drop-down list box.
7. Click Insert, and then click Select All.
8. Click Insert, and then click Close.
9. Select File, Save All.
10. Enter the project name *INITALTAUD*.

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

11. Click OK.

Properties

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

Task 1-6-4: Run the Initial Alter Audit

To verify that the PeopleTools definitions are synchronized with the underlying SQL data tables in your database, run the 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 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 PeopleTools definitions.

Properties

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

Task 1-6-5: Review the Initial Audits

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

Review the output from the SYSAUDIT and DDDAUDIT reports and correct any discrepancies. When application tables are deleted from the Application Designer, they are not automatically deleted from the system tables. PeopleSoft 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 PeopleSoft. Drop any unnecessary deleted tables now so that your future DDDAUDIT reports will be as clean as possible.

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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 PeopleTools Record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies.

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

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

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

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

Properties

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

Task 1-7: Evaluating Global Consolidations Entries

This section discusses:

- Enabling Global Consolidations Queries
- Running Global Consolidations Queries

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

The following table describes the queries you will use in this task:

Query Name	Description
UPG_GC_CURR_RULE	Evaluates duplicated rows for the upgrade of GC_CURR_RULE.
UPG_GC_OWNSET_DUPS	Evaluates duplicate rows for the owner rule set (GC_OWN_RSET_DTL) rows from equitization and NCI rule set.

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Query Name	Description
UPG_GC_MODEL_DEFN1	Evaluates Global Consolidations (GC) model and currency groups derived from ledger preparation group and ledger preparation rules. This query may show several different currency groups for each Global Consolidations model.
UPG_GC_MODEL_DEFN2	Evaluates Global Consolidations model and currency groups derived from ledger preparation group and ledger preparation rules. This query will show the one currency group assigned by the upgrade process to each Global Consolidations model.

Task 1-7-1: Enabling Global Consolidations Queries

To enable Global Consolidations user queries:

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

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

Properties

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

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Task 1-7-2: Running Global Consolidations Queries

To run the queries to evaluate Global Consolidations entries:

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

   `UPG_GC_CURR_RULE`

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

   `UPG_GC_OWNSET_DUPS`

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

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

   This query basically gives you the ability to browse through the rule sets that are associated to an Owner set. If the you want to retain the NCI rule set instead of the Equitization rule set, you can retain your selection by deleting the Equitization rule set for that particular Owner set or you can make other appropriate changes to obtain the desired source record.
4. Run UPG_GC_MODEL_DEFN1 query:

   `UPG_GC_MODEL_DEFN1`

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

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

   ---

5. Run UPG_GC_MODEL_DEFN2 query:

   `UPG_GC_MODEL_DEFN2`

   The UPG_GC_MODEL_DEFN2 query returns each Global Consolidations model and one currency group that will be assigned during the upgrade process. The new release moves the currency group from the ledger preparation rule to the Global Consolidations model. This query shows which currency group will be assigned during the upgrade. Please compare the results of query UPG_GC_MODEL_DEFN1 to the results of query UPG_GC_MODEL_DEFN2. If both queries have the same results, then no action is needed. If query UPG_GC_MODEL_DEFN1 has more rows than query UPG_GC_MODEL_DEFN2, then you need to review or change currency groups, or possibly add new currency groups to provide similar

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functionality in the new release. The changes can be done before or after upgrade data conversion, but must be resolved before applying the changes to your production database.

Properties

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

Task 1-8: Running GC Journal Publish Rule Query

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

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

To enable the query:

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

To run the query:

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

   ```
   UPG_GC_PUB_RULE_INFO
   ```

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

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Properties

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

Task 1-9: Running Application Information Queries

This section discusses:

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

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

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

Task 1-9-1: Running KPI Manager Queries

This section discusses:

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

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

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

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

Enabling the Scorecard Definition Query

To enable the Scorecard definition query:

1. On your Copy of Production database, select PeopleSoft, PeopleTools, Security, Query Security, Query Access Manager.
2. Enter “QUERY_TREE_BSC” in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_BSC link from the grid.
5. Click the BSC_ACCESS_GROUP - BSC_ACCESS_GROUP link.

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6. If you do not see record BC_BSC_DFN under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP - BSC_ACCESS_GROUP.
   a. On the Add Child Record page, enter BC_BSC_DFN in the Record (Table) Name field.
   b. Click the Add button.
7. Click the BSC_ACCESS_GROUP - BSC_ACCESS_GROUP link.
8. Click the Insert Child record icon next to BSC_ACCESS_GROUP - BSC_ACCESS_GROUP.
9. On the Add Child Record page, enter PF_SY_OPR_EMPL in the Record (Table) Name field.
10. Save the tree.

Running the Scorecard Definition Query

To run the Scorecard definition query:

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

   `UPG_BC_01`

3. Save the query results.

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

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

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

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

Properties

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

Task 1-9-2: Associating an Employee ID to a User ID

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

To associate a Scorecard employee ID to a user ID:

1. On your Copy of Production database, select PeopleSoft, Define Business Rules EPM, Security, Setup EmplID for a User.
2. For each employee ID returned by the UPG_BC_01 query, perform the following steps:

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a. Select a user ID in the Setup EmplID for a User Search page.
b. Click the Search button.
c. Enter a SetID value.
d. Enter an EmplID value. EmplID value is an Employee ID returned in the UPG_BC_01 query.
e. Click Save.

Properties

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

Task 1-10: Upgrading Project Request IDs

This section discusses:

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

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

Note. This task is only applicable to Customers upgrading from PeopleSoft EPM 8.8 with no Service Pack applied.

Task 1-10-1: Identifying Duplicate Project Request IDs

This section discusses:

- Enabling the UPG_PPK_PRJ_ID_DUP Query
- Running the UPG_PPK_PRJ_ID_DUP Query

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

Enabling the UPG_PPK_PRJ_ID_DUP Query

To enable the UPG_PPK_PRJ_ID_DUP query:

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

Running the UPG_PPK_PRJ_ID_DUP Query

To run the UPG_PPK_PRJ_ID_DUP query:

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

   ```
   UPG_PPK_PRJ_ID_DUP
   ```

3. Save the query results.

Properties

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

Task 1-10-2: Determining Whether Update Was Applied

This section discusses:

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

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

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See Identifying Duplicate Project Request IDs.

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

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

Determining Whether the Update Was Applied

To determine if the update has been applied:

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

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

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

Editing the Script Because No Update Was Applied

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

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

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

3. Save and close the script.

Properties

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

Task 1-10-3: Editing Script for New Project Request IDs

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

See Identifying Duplicate Project Request IDs.

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

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

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

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

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

To edit the duplicate project request IDs script:

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

   The NEW_PROJ_ID value must be in upper case with a maximum length of 15 characters.
3. Replace all instances of the string 'OLD_PROJ_BU' in the script with the Business Unit of the project you are renaming.

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

   For example, using the first chosen project request to rename in the example, you would replace *OLD_PROJ_BU* with *PSOFT*.
4. Replace all the instances of the string 'OLD_PROJ_ID' in the script with the project request ID of the project request you are renaming.

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

   For example, using the first chose project request name to rename in the example you would replace *OLD_PROJ_ID* with *IT-123456*.
5. If you have more than one project request ID to rename, then repeat the update statements as needed; specifying your business unit, old project request ID, and new project request ID.
6. Save the script.

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Properties

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

Task 1-10-4: Running Duplicate Project Request ID Script

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

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

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

Properties

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

Task 1-11: Preparing to Upgrade OBJECTOWNERIDs

This section discusses:

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

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

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

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Task 1-11-1: Loading PeopleSoft OBJECTOWNERID Values

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

pupfnownermap.dms

Properties

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

Task 1-11-2: Identifying Custom PF_OWNER Values

Enabling the UPG_OWNER_MAP Query

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

To enable the query security:

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

Running the UPG_OWNER_MAP Query

Then, to identify customer PF_OWNER values.

1. Run the following PeopleSoft Query:

   ```
   UPG_OWNER_MAP
   ```

   This query will identify your custom PF_OWNER values.

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

Properties

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

Task 1-11-3: Editing the Custom PF_OWNER Script

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

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

To edit the custom PF_OWNER script:

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

Properties

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

Task 1-11-4: Loading Custom PF_OWNER Values

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

pupfnownermap03.dms

Properties

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

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Task 1-12: Defining Defaults for the OWE Upgrade

This section discusses:

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

Understanding Default Source Information

This section discusses:

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

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

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

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

Considerations for Defining Default Source System IDs

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

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

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

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Considerations for Defining Default Data Origins

There are three possible values for data origin:

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

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

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

---

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

Task 1-12-1: Identifying Source System IDs

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

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

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

To identify your source system IDs:

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

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Properties

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

Task 1-12-2: Assigning Defaults for the OWE Upgrade

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

To assign the defaults:

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

Properties

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

Task 1-13: Identifying Custom Object Types

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

```
PUPFNOBJTYPE02.SQL
```

Properties

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

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Task 1-14: Performing Budgeting Application Activities

This section discusses:

- Checking In Budgeting Activities
- Exporting Line Item Budgeting Data

Task 1-14-1: Checking In Budgeting Activities

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

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

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

Properties

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

Task 1-14-2: Exporting Line Item Budgeting Data

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

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

To run the Export to GL (BPEXPORT) process:

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

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

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Properties

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

Task 1-15: Reporting Row Count for Tables

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 your C:\TEMP directory.

Properties

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

Task 1-16: Preparing Your Database

This section discusses:

- Understanding Database Preparation
- Verify Database Integrity
- Clean the PSOBJCHNG Table
- Drop PeopleTools Tables
- Shrink Images
- Purge Message Queues

Understanding Database Preparation

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

Task 1-16-1: Verify Database Integrity

The DBCC CHECKDB command is run to perform a database consistency check on your Copy of Production database. A database consistency check ensures that your database platform environment is clean and minimizes any potential upgrade errors due to possible database corruption.

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Properties

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

Task 1-16-2: Clean 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. 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 “Apply Application Changes,” Modifying the Database Structure.

Properties

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

Task 1-16-3: Drop PeopleTools Tables

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

Drop the following tables:

- PS_PSMCFQUEUESLANG

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

- PSOPTSTATUS

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

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Properties

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

Task 1-16-4: Shrink Images

If you have customized images stored in your database, you may need to shrink these images before updating 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 PeopleTools release later than 8.44.14:

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

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

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

```
-- CREATE A TABLE TO HOLD THE CONVERTED IMAGE
CREATE TABLE PS_CONVIMG (CONTNAME VARCHAR2(30), IMAGESIZE BLOB);
-- LOAD CONVERTED DATA INTO THE TABLE
INSERT INTO PS_CONVIMG SELECT CONTNAME,TO_LOB(CONTDATA) FROM PSCONTDEFN;
-- RETRIEVE IMAGES OVER 32K
SELECT CONTNAME, DBMS_LOB.GETLENGTH(IMAGESIZE) IMAGESIZE FROM PS_CONVIMG WHERE⇒
 DBMS_LOB.GETLENGTH(IMAGESIZE) > 32768;
```

To manually save images greater than 32 KB:

1. In Application Designer, insert your images into a project. Select Insert, Definitions into Project.
2. Save the project.

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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 “Apply PeopleTools Changes,” Updating PeopleTools System Tables.

Properties

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

Task 1-16-5: Purge 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 Data Mover script (DMS), found in the %PS_HOME\SCRIPTS directory of your old release codeline, on your Copy of Production database to purge your message queues:

```
APPMSGPURGEALL.DMS
```

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

Properties

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

Task 1-17: Backing Up Demo Databases

This section discusses:

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

Task 1-17-1: Backing Up 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 PeopleSoft-delivered demo implementation.

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Properties

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

Task 1-17-2: Backing Up 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 PeopleSoft-delivered demo implementation.

Properties

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

Task 1-18: Comparing Customizations

This section discusses:

- Modifying Compare Report Options
- Running Compare UPGCUST
- Running UPGCUST Filter Script
- Adding Budgeting Subrecords to UPGCUST
- Reviewing UPGCUST Compare Log

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

Task 1-18-1: Modifying Compare Report Options

PeopleSoft Change Assistant templates are delivered with the default report filters turned on. This limits the size of the reports and keeps them manageable. Before you start the compare, review the compare options in your Change Assistant template step properties and modify them based on your specific requirements.

If you decide not to modify the compare options, the objects are still compared. However, the results are only available online in Application Designer, and are not written into 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 Application Designer.

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

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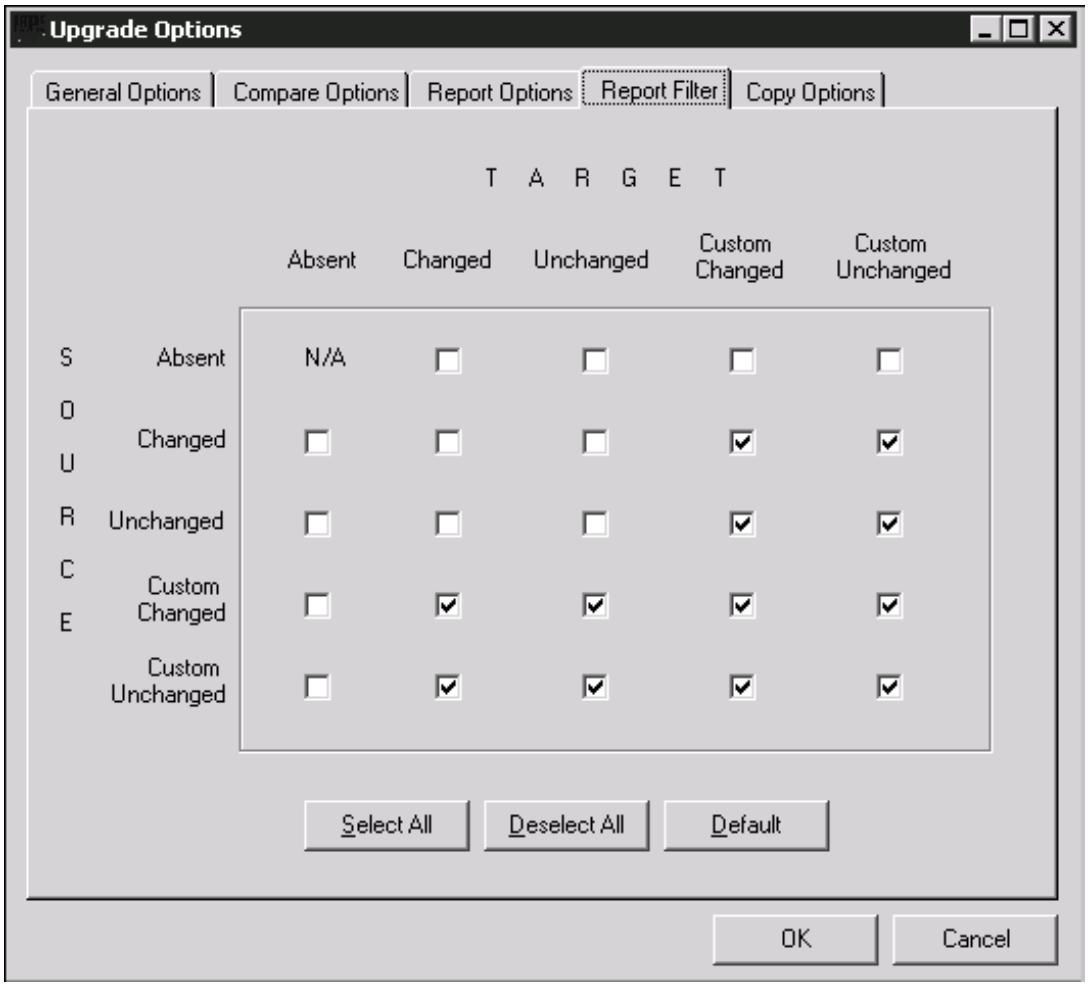
To modify the upgrade compare options:

1. Highlight the Run Compare UPGCUST step and right-click.
2. Select Step Properties

   The Step Definition dialog box appears.
3. Click Upgrade.

   The Compare and Report dialog box appears.
4. Click Options.
5. Select the Report Filter tab.

   The default options include your custom changes on the reports.
6. Change the default options as necessary and click OK.



Upgrade Options page, Report Filter tab

7. In the Compare and Report dialog box, click OK.
8. In the Step Definition dialog box, click OK.
9. Select File, Save Job.

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Properties

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

Task 1-18-2: Running Compare UPGCUST

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

- Application packages.
- Application package PeopleCode.
- File reference type codes.
- IB queues.
- Java portlet user preferences.
- Messages.
- Message catalog entries.
- Message PeopleCode.
- Portal registry user favorites.
- Portal registry user home pages.
- Services
- Service operations.
- Service operations handlers.
- Service operation versions.
- Service operation routings.

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

Properties

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

Task 1-18-3: Running 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. It is used to isolate only custom objects in the UPGCUST project.

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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 1-18-4: Adding Budgeting Subrecords to UPGCUST

This section discusses:

- Understanding Adding Planning and Budgeting Subrecords
- Adding the Subrecords to the UPGCUST Project
- Setting Key and Non-Key Fields

Understanding Adding Planning and Budgeting Subrecords

In this step, you will add two Planning and Budgeting subrecords to the UPGCUST project: BP_CF9B_AK_SBR and CF9A_PK_SBR.

For the Planning and Budgeting subrecord, BP_CF9B_AK_SBR, the following eight dimensions are delivered as inactive in the current release of EPM:

- AFFILIATE_INTRA1
- AFFILIATE_INTRA2
- CHARTFIELD1
- CHARTFIELD2
- CHARTFIELD3
- DIMENSION1
- DIMENSION2
- DIMENSION3

For the Planning and Budgeting subrecord, CF9A_PK_SBR, the following five dimensions are delivered as inactive in the current release of EPM:

- AFFILIATE_INTRA1
- AFFILIATE_INTRA2
- CHARTFIELD1
- CHARTFIELD2
- CHARTFIELD3

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You may have data in your Target database that utilizes the active dimensions, which may generate duplicate key errors in the create index step later in the upgrade process. To circumvent these create index errors, you must add BP_CF9B_AK_SBR and CF9A_PK_SBR to the UPGCUST project so that the different key structure between the current release and the new release is treated as a customization.

Adding the Subrecords to the UPGCUST Project

To add BP_CF9B_AK_SBR and CF9A_PK_SBR to the UPGCUST project:

1. Launch PeopleTools and sign on to the Target database.
2. From Application Designer, select File, Open.
3. In the Open Definition dialog box, select Project and enter the project name UPGCUST.
4. Select Insert, Definitions into Project.
5. In the Insert into Project dialog box, select Records and enter the record name BP_CF9B_AK_SBR.
6. Highlight BP_CF9B_AK_SBR and insert it into UPGCUST.
7. For subrecord CF9A_PK_SBR, repeat the steps 4 through 6.

   Use this subrecord if you are modifying LEDGER_PROJ.
8. Select File, Save All to save the UPGCUST project.

Setting Key and Non-Key Fields

For the new release, the Planning and Budgeting application will add the following four fields as key fields to BP_CF9B_AK_SBR subrecord for integration with Oracle's JD Edwards EnterpriseOne application:

- BUS_UNIT_E1
- SUBLEDGER
- SUBLDGR_TYPE
- SUBSIDIARY

At the same time, the Planning and Budgeting application will change the following five fields to non-key fields on BP_CF9B_AK_SBR subrecord:

- AFFILIATE_INTRA1
- AFFILIATE_INTRA2
- CHARTFIELD1
- CHARTFIELD2
- CHARTFIELD3

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

For details on changing the choice of ChartFields to be used as keys, refer to your PeopleBooks.

See the PeopleSoft Enterprise Planning and Budgeting PeopleBook for your new release, Setting Up the System, "Activating Inactive Dimensions."

To set key and non-key fields.

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1. For the BP_CF9B_AK_SBR subrecord, complete only one of steps 2 and 3, then go to step 4.
2. If you do not use any of the four EnterpriseOne integration fields (BUS_UNIT_E1, SUBLEDGER, SUBLDGR_TYPE, SUBSIDIARY), set all four EnterpriseOne integration fields to be non-key fields on BP_CF9B_AK_SBR.
3. If you want to use any of the four EnterpriseOne integration fields, you must set some fields in the BP_CF9B_AK_SBR subrecord to be non-key fields.

   You need to analyze your data and see which fields can be turned to non-key fields without causing unique constraint errors. On your Target database, open each of the records listed in *PeopleSoft Enterprise Planning and Budgeting PeopleBook* in Application Designer and deactivate ChartFields so that the total number of columns used as keys does not exceed 32.
4. For the CF9A_PK_SBR subrecord, you need to analyze your data and see which fields can be turned to non-key fields without causing unique constraint errors; use this subrecord if you are modifying LEDGER_PROJ.

   On your Target database, open each of the records listed in *PeopleSoft Enterprise Planning and Budgeting PeopleBook* in Application Designer and deactivate ChartFields so that the total number of columns used as keys does not exceed 32.
5. Select File, Save All to save the UPGCUST project.

Properties

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

Task 1-18-5: Reviewing UPGCUST Compare Log

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

Properties

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

Task 1-19: Identifying Customizations

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

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The upgrade tasks will replace all Mass Change processes, Verity Based Indexes, and Setup Manager data. You cannot print Mass Change code. Be sure 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 PeopleSoft-delivered data.

Message sets 0-19,999 will be overlaid during the upgrade, so any customizations you have 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 PeopleSoft-loaded data must not be overwritten.

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

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

Important! The script(s) below 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 these scripts:

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

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

```
DLPFLASYSE.DMS
DLPFLASYSI.DMS
```

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

Tables	Scripts
Mass Change	`MVAPPEXP.DMS` `MVAPPIMP.DMS`

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

See Also

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

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

Properties

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

Task 1-20: Preparing for the Application Upgrade

This section discusses:

- Creating a Copy of RecField Definitions
- Creating a Copy of DBField Definitions
- Creating Scorecard Copy of SET_CNTRL_REC
- Creating Budgeting Copy of SET_CNTRL_REC
- Deleting Old Pagelet Wizard Data
- Running the PUUPJ01 Drop Table Script
- Running the PUUPN01 Drop Table Script
- Running the PUBGN01 Drop Table Script
- Running the PUPPKN01 Drop Table Script
- Running the PUFTN01 Drop Table Script
- Running the PUPFX01 Drop Table Script
- Editing the System Data Swap Script

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- Editing the PeopleTools Swap Script

Task 1-20-1: 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.

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

The script name is:

```
PUUPX07.DMS
```

Properties

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

Task 1-20-2: Creating a Copy of DBField Definitions

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

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

```
PUECX01.dms
```

Properties

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

Task 1-20-3: Creating Scorecard Copy of SET_CNTRL_REC

This task is only applicable to customers upgrading any PeopleSoft Scorecard product.

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

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

```
PUBCN01.dms
```

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Properties

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

Task 1-20-4: Creating Budgeting Copy of SET_CNTRL_REC

This task is only applicable to customers upgrading PeopleSoft Planning and Budgeting.

The Budgeting Center table has been deprecated in the new release. The data from this table is being migrated to a new table. To successfully convert data from the old table to the new table, you will need to copy data from the PeopleTools set control record to a temporary table. The temporary table will be referenced later in the upgrade during data conversion.

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

```
PUBGN02.DMS
```

Properties

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

Task 1-20-5: Deleting Old Pagelet Wizard Data

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

In this step, you run a script to delete the Common Component Pagelet Wizard (PW) data to ensure that when the UPGPT846PP conversion program is run subsequently, the old existing Common Components Pagelet Wizard data is not re-entered into the PeopleTools Pagelet Wizard tables. If you do not run the script, then items that were removed from the PeopleTools version of Pagelet Wizard, but still exist in the Common Components version of Pagelet Wizard, will be copied back into the 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 PeopleTools portal options tables. If you do not run the script, then changes made to the current PeopleTools options tables may be overwritten with values from the Common Components portal options when the UPGPT846PP conversion program is run. The affected values include the default registry prefix, default owner ID, and the default style sheet.

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

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

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

```
PTPPB_EOPPB.DMS
```

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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 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 1-20-6: Running the PUUPJ01 Drop Table Script

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

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

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

```
PUUPJ01.DMS
```

Properties

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

Task 1-20-7: Running the PUUPN01 Drop Table Script

In this step, you will drop tables to prevent errors in the step, "Build the Create and Alter Scripts." Some of these tables may contain data that will be lost when the table is dropped; however, this data is not needed for the application.

Since OWS tables are not upgraded, this data will be lost when the tables are dropped.

The script name is:

```
PUUPN01.DMS
```

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Properties

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

Task 1-20-8: Running the PUBGN01 Drop Table Script

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

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

The script name is:

```
PUBGN01.DMS
```

Properties

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

Task 1-20-9: Running the PUPPKN01 Drop Table Script

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

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

The script name is:

```
PUPPKN01.DMS
```

Properties

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

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Task 1-20-10: Running the PUFTN01 Drop Table Script

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

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

The script name is:

```
PUFTN01.DMS
```

Properties

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

Task 1-20-11: Running the PUPFX01 Drop Table Script

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

The script name is:

```
PUPFX01.DMS
```

Properties

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

Task 1-20-12: Editing the System Data Swap Script

This step should only be done if your Copy of Production has a base language other than English. In the next step you will be swapping all system data tables that have related language on your Demo database, so that it is translated correctly when you copy to your Copy of Production. You will first need to edit the script that will do the swapping to set your Demo database language to the same language as your Copy of Production. To do this, follow the edit instructions in the script.

The swap system data script for your path is:

```
DLPFLASWAP.DMS
```

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Properties

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

Task 1-20-13: Editing the PeopleTools Swap Script

This step should only be completed if your Copy of Production has a base language other than English. In a later step you will swap all PeopleTools Managed Object tables that have related languages on your Demo Database so that it is translated correctly when you copy to your Copy of Production. In this step you edit the swap script to set your Demo database language to the same language as your Copy of Production. To do this, follow the edit instructions in the script.

The swap script for your upgrade path is:

```
PT_RELEASE_SWAP.DMS
```

Properties

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

Task 1-21: Backing Up After Prepare 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 2

Apply PeopleTools Changes

This chapter discusses:

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

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Understanding PeopleTools Changes

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

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 2-1: Verifying 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 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.

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

Properties

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

Task 2-2: Performing Script Modifications

This section discusses:

- Understanding Script Modifications

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- Update Configuration Manager Profile
- Run a DBTSFIX Report
- Edit the DBTSFIX Output Scripts
- Edit the GRANT Script
- Edit the PSLANGUAGES Script
- Edit the TLSUPGNONCOMP Script
- Edit the PTxxxTLS Scripts
- Edit the DB2 Scripts
- Edit Move to Production Import Scripts
- Edit Move to Production Password
- Edit the DDLDB2 Script
- Edit the DDLDBX Script
- Edit the DDLORA Script
- Edit the DDLIFX Script
- Edit the MSGTLSUPG Script
- Edit the Integration Broker Script
- Edit Multilingual Step Properties
- Edit Data Type Steps

Understanding Script Modifications

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

Note. Move to Production: These steps will be repeated in the Move to Production (MTP) pass. The script 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 2-2-1: Update Configuration Manager Profile

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

To update the profile:

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

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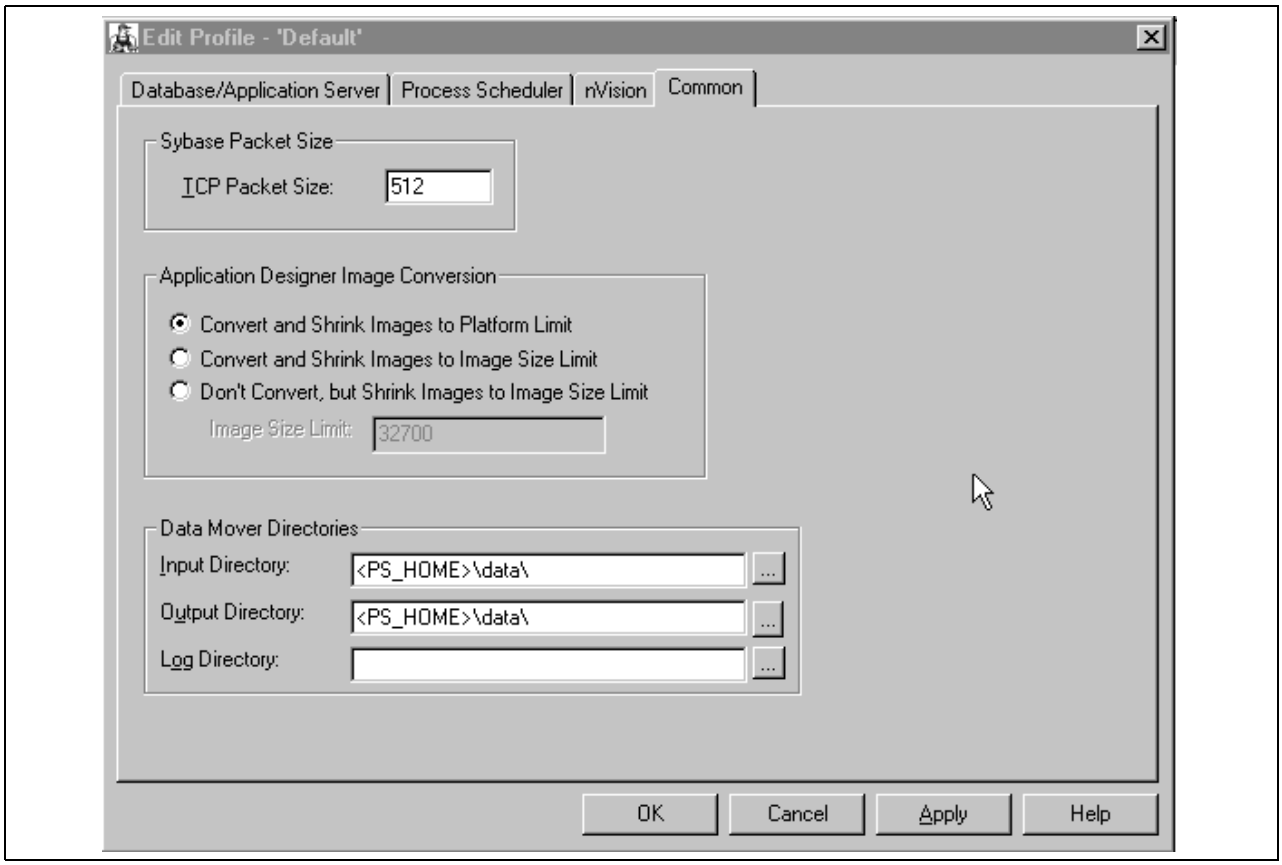

Edit Profile - Default dialog box

Note. The Input Directory must be <*PS_HOME*>\data\, substituting <*PS_HOME*> with your directory. The Output Directory must be the same.

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

Properties

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

Task 2-2-2: Run 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, 800, 810, 811, 812, and so on) associated with your particular path.

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

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

Properties

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

Task 2-2-3: Edit 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 Change Assistant output directory for this upgrade path.

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

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

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Properties

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

Task 2-2-4: Edit 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 2-2-5: Edit the PSLANGUAGES Script

Edit `PS_HOME\SCRIPTS\PSLANGUAGES.DMS` and make the necessary modifications as documented in the script.

Properties

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

Task 2-2-6: Edit the TLSUPGNONCOMP Script

Edit PS_HOME\SCRIPTS\TLSUPGNONCOMP.DMS and make the necessary modifications as documented in the script.

Properties

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

Task 2-2-7: Edit the PTxxxTLS Scripts

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

To edit the PT*xxx*TLS scripts:

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1. Edit all 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 PeopleTools release greater than your current PeopleTools release and *yyy* represents the three-letter language code.

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

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

Properties

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

Task 2-2-8: Edit 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 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 you need to edit:

```
DB2TMPIDXCREATE.SQL
DLUPX02I.DMS
DLUPX13I.DMS
DLUPX14I.DMS
DLUPX96I.DMS
PT_RELEASE_IMPORT.DMS
UVPFX02.SQL
UVPFX03.SQL
UVPFX04.SQL
DLPFSYSI.DMS
DLPFLASYSI.DMS
RNPFN01DB2.SQL
RNPFN02DB2.SQL
```

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

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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 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 as a manual stop in Change Assistant, highlight the step and select Edit, Stop from the menu bar.

Following is a list of the steps in Chapter 4, "Apply Application Changes," that you will need to set as a manual stop and the names of the scripts you need to edit:

- Run the Create Upgrade Tables Script (in the task Modifying the Database Structure)

  When you get to this step, edit the script UPGCONVERT_CRTTBL.SQL

Properties

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

Task 2-2-9: Edit 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 you need to edit:

```
MVAPPIMP.DMS
MVPRDIMP.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 Enterprise PeopleTools PeopleBook: Data Management for your new release.

See "Apply Changes to Production Database," Performing the Move to Production.

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Properties

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

Task 2-2-10: Edit 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 2-2-11: Edit the DDLDB2 Script

Edit `PS_HOME\SCRIPTS\DDLDB2.DMS`. At the bottom of this script, you will see 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 by PeopleSoft in this script.

Properties

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

Task 2-2-12: Edit the DDLDBX Script

Edit `PS_HOME\SCRIPTS\DDLDBX.DMS`. At the bottom of this script, you will see 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 by PeopleSoft in this script.

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Properties

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

Task 2-2-13: Edit the DDLORA Script

Edit `PS_HOME\SCRIPTS\DDLORA.DMS`. At the bottom of this script, you will see 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 by PeopleSoft in this script.

Properties

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

Task 2-2-14: Edit the DDLIFX Script

Edit `PS_HOME\SCRIPTS\DDLIFX.DMS`. At the bottom of this script, you will see 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 by PeopleSoft in this script.

Properties

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

Task 2-2-15: Edit the MSGTLSUPG Script

Edit `PS_HOME\SCRIPTS\MSGTLSUPG.DMS` and make the necessary modifications as documented in the script.

Properties

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

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Task 2-2-16: Edit the Integration Broker Script

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 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.

Note. If you are upgrading from PeopleTools 8.48 or later, this step and all of the steps in the task "Converting Integration Broker" do not need to be run since the Integration Broker conversion has already been performed. You may mark all of these steps as "Complete" in your upgrade job. If you don't mark these steps as complete, the upgrade will try to unnecessarily reconvert your objects.

Properties

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

Task 2-2-17: Edit Multilingual Step Properties

In this step, you will edit the Change Assistant step properties for the multilingual PeopleTools project copy step (or steps). Copy only the translated objects for the languages 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, Czech, Danish, Finnish, French, Hebrew, Hungarian, Norwegian, Polish, Russian, or Turkish, perform the following instructions for the step "Export and Copy PPLTLSML Project." If you license any of these languages, Canadian French, Dutch, German, Greek, Italian, Japanese, Korean, Malay, Portuguese, Simplified Chinese, Spanish, Swedish, Traditional Chinese, or Thai, perform the following instructions for the step "Export and Copy PPLTLS84CURML Project."

To edit multilingual step properties:

1. In 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 Change Assistant.

See Export and Copy PPLTLS84CURML Project.

See Export and Copy PPLTLSML Project.

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Properties

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

Task 2-2-18: Edit Data Type Steps

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

To set the Data Conversion steps as complete:

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

See Converting Database Data Types.

Properties

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

Task 2-3: Updating PeopleTools System Tables

This section discusses:

- Understanding Updating PeopleTools System Tables
- Clean Up Message Data
- Update System Catalog Views
- Update PeopleTools System Tables
- Grant Privileges to the CONNECT ID
- Update the Product License Code
- Update PeopleTools Patch Information
- Create Temporary Performance Indexes
- Export PeopleTools System Tables
- Import PeopleTools System Tables

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- Reset Database Options Flag
- Rerun Update Statistics for DB2 zOS
- Rerun RUNSTATS Report for DB2 UNIX NT
- Rerun Update Statistics for DB2 UNIX NT
- Rerun Update Statistics for Informix
- Rerun Update Statistics for Oracle

Understanding Updating PeopleTools System Tables

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

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

Task 2-3-1: Clean Up Message Data

If you are upgrading from PeopleTools 8.48 or later, mark this step as "Complete" in your upgrade job and continue with the rest of the upgrade. Do NOT perform any deletes in this step as you will wipe out current valid data that is needed for your system to function properly.

If you are upgrading from PeopleTools 8.47 or earlier, perform this step to clean out obsolete message data. Message functionality and structure changed as of PeopleTools 8.48 and the old data is obsolete. Edit PS_HOME\SCRIPTS\PTUPGIBDEL.SQL to delete data from the tables that only exist in the old PeopleTools release. Open the script and make the following modifications:

1. Search for the string "--- End of PT8.*xx* ---" in which *xx* represents the last two digits of the PeopleTools release you are upgrading from.
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 PeopleTools release you are upgrading from, as determined in Step 1.

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

Follow this procedure to edit your template so the script can run automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Script/Procedure value from PTUPGIBDEL8xx to the specific name you used in Step 3 without the .SQL extension.
3. Change the Type from ManualStop to SQLScript, and click OK.
4. In your upgrade job, mark the step as Run.

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Properties

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

Task 2-3-2: Update System Catalog Views

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

Properties

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

Task 2-3-3: Update 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 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 PeopleTools release number.

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

If you created `REL`*`xxx`*`DBTSFIX` (in which *xxx* is a 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`, Change Assistant will run `REL`*`xxx`*.

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

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

Properties

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

Task 2-3-4: Grant 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.

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Properties

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

Task 2-3-5: Update the Product License Code

This section discusses:

- Understanding the Product License Code
- Updating the Product License Code

Understanding 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 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 UDB z/OS	DB2
DB2 UDB UNIX/NT	DBX
Oracle	ORA
Informix	INF
Sybase	SYB

Updating the Product License Code

Follow the steps below to update your product license code.

To update the product license code:

1. From the Data Mover script that was created for your new PeopleSoft database installation, copy out the update to PSOPTIONS.

   The statement should look similar to this:

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```
update PSOPTIONS set LICENSE_CODE = 'xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx', LICENSE_⇒
GROUP = 'xx';
```

where *'xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx'* equals your license code and *'xx'* equals your license group.

2. Run the SQL command identified above using your SQL tool.

Your database is now updated with the appropriate license code. You can now access the pages and Application Engine programs that you licensed.

Properties

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

Task 2-3-6: Update PeopleTools Patch Information

In this step, you update your database with the version of the PeopleTools patch being applied.

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

Log on to Data Mover in user mode and run the %PS_HOME\SCRIPTS\PTPATCH.DMS script.

Review the PeopleTools patch instructions and perform any additional database upgrade instructions that may be listed prior to the copy of the patch project. The patch project will be copied later during the upgrade.

Properties

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

Task 2-3-7: Create 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

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Task 2-3-8: Export PeopleTools System Tables

The script for this step exports the content of the 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 PeopleTools objects.

The script name for your upgrade path is:

```
MVPRDEXP.DMS
```

Properties

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

Task 2-3-9: Import PeopleTools System Tables

The script for this step imports the content of the 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:

- Renaming Records and Fields
- Running New Release Compare Reports
- Running New Release Upgrade Copy

If your relational database management system (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 2-3-10: Reset Database Options Flag

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

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Properties

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

Task 2-3-11: Rerun Update Statistics for DB2 zOS

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

Properties

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

Task 2-3-12: Rerun RUNSTATS Report for DB2 UNIX NT

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

Properties

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

Task 2-3-13: Rerun Update Statistics for DB2 UNIX NT

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

Properties

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

Task 2-3-14: Rerun 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.

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Properties

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

Task 2-3-15: Rerun Update Statistics for Oracle

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

Properties

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

Task 2-4: Turning Off Change Control

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

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are 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 2-5: Loading Model Definition Data

This section discusses:

- Understanding Model Definition Data Load Process
- Load Model Definitions for DB2 zOS
- Load Model Definitions for DB2 UNIX NT

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- Load Model Definitions for Oracle
- Load Model Definitions for Informix
- Load Model Definitions for Microsoft
- Load Model Definitions for Sybase

Understanding Model Definition Data Load Process

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 2-5-1: Load Model Definitions for DB2 zOS

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

Properties

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

Task 2-5-2: Load Model Definitions for DB2 UNIX NT

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

Properties

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

Task 2-5-3: Load 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 2-5-4: Load Model Definitions for Informix

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

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Properties

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

Task 2-5-5: Load Model Definitions for Microsoft

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

Properties

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

Task 2-5-6: Load 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 2-6: Loading Message Data

This step loads system messages in the message catalog.

Properties

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

Task 2-7: Reviewing PeopleTools Objects

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

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

Warning! Do not change the delivered 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 PeopleTools projects during the upgrade, you may overwrite modifications you have made. Excluding any PeopleTools-delivered objects from the upgrade may result in instability due to dependencies on specific objects.

To review PeopleTools objects:

1. Open the PPLTLS84CUR project on your Source database.
   a. Launch Application Designer and sign on to the Demo (Source) database.
   b. Select File, Open...
   c. In the Definition field, select Project and click Open to display a list of projects.
   d. Select the PPLTLS84CUR project and click Open.
2. If the PPLTLS84CUR project does not exist on your Demo (Source) database, then copy the project definition; otherwise continue to the next step.
   a. Select Tools, Copy Project, From File...
   b. In the resulting dialog box, change the import directory to *PS_HOME*\PROJECTS, select PPLTLS84CUR from the list of projects and click on the Open button.
   c. The Copy dialog box appears. Click on the Deselect All button and then click the Copy button.

      When the progress dialog disappears, the project definition has been copied.
3. On your Source database, make a copy of the PPLTLS84CUR project and name it PPLTLS84CURCOMP. You will use this project for the compare process.
   a. If the PPLTLS84CUR project is not open, open it now.
   b. Select File, Save Project As…
   c. Name the project PPLTLS84CURCOMP.
4. On your Source database, perform a project compare of the PPLTLS84CURCOMP project against your Target database.
   a. If the PPLTLS84CURCOMP project is not open, open it now.
   b. Select Tools, Compare and Report…
   c. Sign on to the Target database.
   d. Verify that all object types are selected.
   e. Select Options…
   f. On the Compare Options tab, select Compare Type of Project.
   g. Select a value for Target Orientation.
   h. For Comparison by Release, select the highest release in the list.
   i. Under Compare Languages, select Common and English.
   j. If you have non-English languages loaded, select the other language(s) loaded into your database.

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k. Click the Report Filter tab and click Default.

This will cause only customizations to appear on the compare reports.

l. Click OK.

m. Click Compare to start the compare process.

Note. To preserve the PPLTLS84CURCOMP compare reports, you must perform one of the following actions: 1) rename the reports, 2) move the reports to a different folder, or 3) reset the Compare Report Output Directory: Within Application Designer, select Tools, Options. On the General tab, change the path specified for the Report Output Directory.

---

5. Evaluate the compare reports to identify whether the delivered objects conflict with any of your customizations.

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

Properties

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

Task 2-8: Exporting and Copying Projects

This section discusses:

- Understanding Exporting and Copying Projects
- Export and Copy PPLTLS84CUR Project
- Export and Copy PPLTLS84CURML Project
- Export and Copy PPLTLSML Project
- Export and Copy PPLTLS84CURDEL Project
- Export and Copy PATCH84X Project
- Export and Copy PATCH84XML Project

Understanding Exporting and Copying Projects

In this task, you export and copy projects.

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

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

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

Task 2-8-1: Export and Copy PPLTLS84CUR Project

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

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. PeopleSoft 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 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 2-8-2: Export and Copy PPLTLS84CURML Project

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

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. PeopleSoft 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 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 Greek German Italian Japanese Korean Portuguese Simplified Chinese Spanish Swedish Traditional Chinese Thai Malay

Task 2-8-3: Export and Copy PPLTLSML Project

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

Before copying records and fields, the upgrade process detects whether the object definition exists. PeopleSoft 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 PeopleTools project contains fields along with their field labels. This is necessary so PeopleSoft 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 Czech Danish Finnish French Hebrew Hungarian Norwegian Polish Russian Turkish

Task 2-8-4: Export and Copy PPLTLS84CURDEL Project

This process deletes specified PeopleTools objects from your database.

Properties

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

Task 2-8-5: Export and Copy PATCH84X Project

This process copies specified objects to the database that are necessary for the proper operation of PeopleTools.

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

Use Application Designer to perform the following steps.

To export and copy the project:

1. Log on to your Target database as a valid user.
2. Select Tools, Copy Project, From File…
3. In the Import Directory field, enter *PS_HOME\PROJECTS*.
4. Select the PATCH84*X* project from the list, in which 84*X* corresponds to the PeopleTools release of the patch project.

   This should correspond with the PeopleTools release to which you are upgrading.

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5. Select Options; select the languages Common and English *only.*
6. Select Copy to begin copying updated PeopleTools objects to your database.

Properties

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

Task 2-8-6: Export and Copy PATCH84XML Project

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

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

Use Application Designer to perform the following steps.

To export and copy the project:

1. Log on to your Target database as a valid user.
2. Select Tools, Copy Project, From File…
3. In the Import Directory field, enter *PS_HOME\PROJECTS*.
4. Select the PATCH84*X*ML project from the list, where 84*X* represents the PeopleTools release of the patch project. This should correspond to the PeopleTools release to which you are upgrading.
5. Click Options, and then select the Copy Options tab and verify that only the non-English languages that are installed are selected.

   Note. The languages English and Common should not be selected.

   ---

6. Click OK.
7. Click Copy.

Properties

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

Task 2-9: Populating Tablespace Data

This section discusses:

- Create Application Tablespaces

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- Populate Tablespace Data
- Update Tablespace Names

Task 2-9-1: Create Application Tablespaces

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 "Apply Application Changes," Updating Database Overrides.

See "Apply Application Changes," Create New Tablespaces.

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

```
PFDDL.SQL (PFDDLU.SQL for DB2 z/OS Unicode)
```

Important! For DB2 UNIX/NT sites, the script name is `PFDDLDMS.SQL` for ANSI, and `PFDDLDMSU.SQL` for Unicode.

Once you have determined which script to run during Move to Production, you can change this step to run automatically.

To run the Create Application Tablespaces step automatically:

1. In Change Assistant, open your upgrade job.
2. In the task Populating Tablespace Data, right-click on the step Create Application Tablespaces, and then select Step Properties.
3. In the Step Properties dialog box, change the value in the Type field from *ManualStop* to *SQLScript*.
4. In the Script/Procedure field, enter the name of the script you want to run and click OK.
5. Select Edit, Run.

Properties

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

Task 2-9-2: Populate 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 PeopleSoft-delivered names, this step makes those same changes in the PeopleSoft record definition.

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

Properties

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

Task 2-9-3: Update Tablespace Names

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

- Generate the alter/create scripts and globally edit the scripts, changing the database/tablespace values to those of your Copy of Production.
- 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 PeopleSoft-delivered tablespaces, you can omit the references to DDLSPACENAME in the SQL statement above.

Properties

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

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Task 2-10: Building Updated PeopleTools Project

This section discusses:

- Generate Updated PeopleTools Script
- Edit the Updated PeopleTools Script
- Run the Updated PeopleTools Script

Task 2-10-1: Generate 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 2-10-2: Edit 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 relational database management system (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 Change Assistant output directory for this upgrade path.

Properties

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

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Task 2-10-3: Run 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 2-11: Migrating Records to New Tablespaces

This section discusses:

- Understanding Migration of Records to New Tablespaces
- Export and Copy the PT84TBLSPC Project
- Build the Tablespace Alter Script
- Edit the Tablespace Alter Script
- Run the Tablespace Alter Script

Understanding Migration of Records to New Tablespaces

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

Task 2-11-1: Export and Copy the PT84TBLSPC Project

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

Properties

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

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Task 2-11-2: Build 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 PeopleTools. The script name is:

```
TABLESPACEALTERTABLES.SQL
```

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

Properties

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

Task 2-11-3: Edit 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 Change Assistant output directory for this upgrade path.

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

Properties

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

Task 2-11-4: Run the Tablespace Alter Script

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

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Properties

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

Task 2-12: Loading Base Data

These Data Mover scripts (DMSs) initialize and modify the data in various 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, where *xxx* represents a PeopleTools release number and *yyy* represents a three-letter language code, that are greater than your current PeopleTools release. For some upgrades, no data scripts are required. In this case, Change Assistant continues to the next step without producing a log file.

Properties

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

Task 2-13: Loading Language Data

This section discusses:

- Populate Languages
- Load Language Data

Task 2-13-1: Populate Languages

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

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Task 2-13-2: Load Language Data

If your database has languages installed in addition to English, you must populate the PSLANGUAGES table.

To load language data:

1. From the DMS that was created for your PeopleSoft 8.x database installation, find the UPDATE to PSLANGUAGES. The statement should look similar to the following:

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

2. Run the SQL command identified above using your SQL tool.

   Your database is now updated with the language data.

Properties

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

Task 2-14: Loading PeopleTools Data

This section discusses:

- Load NonComparable Objects
- Load English Messages
- Load English String Data
- Load Stored Statements Data

Task 2-14-1: Load NonComparable Objects

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

Properties

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

Task 2-14-2: Load English Messages

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

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Properties

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

Task 2-14-3: Load 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 2-14-4: Load Stored Statements Data

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

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

Properties

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

Task 2-15: Loading PeopleTools Definition Group

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

Properties

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

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Task 2-16: Converting PeopleTools Objects

This section discusses:

- Update REN Server Configuration
- Populate MCF Data
- Convert Portal Objects
- Convert Query Prompt Headings
- Encrypt Connector Passwords
- Load Conversion Data
- Report Conversion Details
- Run Data Conversion

Task 2-16-1: Update 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 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 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.

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 2-16-2: Populate MCF Data

This step runs the Application Engine program MCF_UPGR_SND, which populates the PS_MCFEM_MAIL_DSCR table with data. In 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.

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Properties

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

Task 2-16-3: Convert 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.

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 Enterprise PeopleTools PeopleBook: Internet Technology for your new release.

Properties

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

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Task 2-16-4: Convert 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 9 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 9.

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 Enterprise PeopleTools PeopleBook: PeopleSoft Query for your new release.

Properties

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

Task 2-16-5: Encrypt Connector Passwords

This step runs the Application Engine program UPGRDPASSWDS, which encrypts the password property field for the POP3Target, FTPTarget, GetMailTarget, and JMSTarget connectors.

Properties

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

Task 2-16-6: Load Conversion Data

This step imports PeopleTools data conversion Application Engine driver data into your database.

Properties

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

Task 2-16-7: Report 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.

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Properties

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

Task 2-16-8: Run Data Conversion

The Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional 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 2-17: Creating PeopleTools Views

This section discusses:

- Create Updated PeopleTools Views

Task 2-17-1: Create Updated PeopleTools Views

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

Properties

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

Task 2-18: Converting Integration Broker

This section discusses:

- Understanding Converting Integration Broker
- Updating Integration Broker Defaults

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- 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

If you are upgrading from PeopleTools 8.48 or later, this task does not need to be run since the Integration Broker conversion has already been performed. You may mark all of the steps in this task as "Complete" in your upgrade job. If you don't mark these steps as complete, the upgrade will try to unnecessarily reconvert your objects.

Task 2-18-1: Updating Integration Broker Defaults

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

Properties

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

Task 2-18-2: Creating Integration Broker Objects

The PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional 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 2-18-3: Saving Application Messaging Objects

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

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Properties

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

Task 2-18-4: 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.

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 2-18-5: Preparing Integration Broker Deletes

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

Properties

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

Task 2-18-6: Deleting Application Messaging Objects

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

Properties

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

Task 2-18-7: Deleting Node Transactions

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

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Properties

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

Task 2-19: 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 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 2-20: Converting Database Data Types

This section discusses:

- Understanding Converting Database Data Types
- Backing Up Before Platform Changes
- Running Long Data Audit
- Validating Microsoft Database
- Reviewing Microsoft Settings
- Creating Microsoft Conversion Project
- Generating Microsoft Conversion Script
- Running Microsoft Conversion Script
- Granting Permissions to the CONNECT ID
- Running Microsoft Conversion Report
- Validating Oracle Database
- Creating Oracle Audit Tables
- Auditing Duplicate Length Constraints

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- Auditing Disabled Constraints
- Reviewing Oracle Settings
- Generating Oracle Conversion Scripts
- Running Long to LOB Script 1
- Running Long to LOB Script 2
- Running Long to LOB Script 3
- Running Long to LOB Script 4
- Running Long to LOB Script 5
- Running Long to LOB Script 6
- Running Long to LOB Script 7
- Running Long to LOB Script 8
- Auditing Long to LOB Conversion
- Running Character Length Script 1
- Running Character Length Script 2
- Running Character Length Script 3
- Running Character Length Script 4
- Running Character Length Script 5
- Running Character Length Script 6
- Running Character Length Script 7
- Running Character Length Script 8
- Auditing Character Length Semantics
- Reviewing Conversion Reports
- Updating Database Options

Understanding Converting Database Data Types

As of PeopleTools 8.48, new database data types are supported for Microsoft SQL Server 2005 or later and Oracle 9i or later. These data type changes are mandatory but only available for use in conjunction with application releases 9.0 or later.

For Microsoft SQL Server 2005 and later, the data types VARCHAR, NVARCHAR, VARBINARY(MAX), and VARCHAR(MAX) are now supported. Databases on Microsoft SQL Server 2000 and earlier will not use these new data types. The data types as defined in Application Designer are not changed; only the database-level definition will be different.

- Records with fields defined as PeopleSoft CHAR(N) will now use VARCHAR(N).
- Records with fields defined as PeopleSoft NCHAR(N) will now use NVARCHAR(N).
- Records with fields defined as PeopleSoft Long Character(N) will now use VARCHAR(N) if N is <=4000 and VARCHAR(MAX) if N is > 4000 for non-Unicode.

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- Records with fields defined as PeopleSoft Long Character(N) will now use NVARCHAR(N) if N is <=4000 and VARCHAR(MAX) if N is > 4000 for Unicode databases.
- Records with fields defined as PeopleSoft IMAGE will now use VARBINARY(MAX).

For Oracle 9i or later, the data types CLOB and BLOB are now supported. In addition, the Character Length Semantics feature is also supported for Unicode databases when creating PeopleSoft CHAR fields and LONG CHARACTER fields with specified lengths less than 1334.

- Records with fields defined as PeopleSoft IMAGE or PeopleSoft LONG CHARACTER with Raw Binary will now use BLOB.
- Records with fields defined as PeopleSoft LONG CHARACTER with no length specified, length greater than 1333(UNICODE), or length greater than 4000 (ANSI) will now use CLOB.

Task 2-20-1: Backing Up Before Platform Changes

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

Important! For Oracle platforms, contact your database administrator to update the statistics on the database catalog. This will improve performance for subsequent steps in the upgrade. Typically only the users sys and sysdba have the authority to perform this task.

The following command updates the statistics on the database catalog:

```
EXEC DBMS_STATS.GATHER_SCHEMA_STATS('SYS');
```

Properties

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

Task 2-20-2: Running Long Data Audit

This step runs LONGS-AUDIT.SQL, which audits for any fields exceeding the actual data length for PeopleSoft long char columns. You will review the output in a later step.

Properties

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

Task 2-20-3: Validating Microsoft Database

This step runs DBSETTINGS.SQL, which checks the Microsoft SQL Server version. The data type conversion is only supported with Microsoft SQL Server 2005 or later. You will review the output in a later step.

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Properties

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

Task 2-20-4: Reviewing Microsoft Settings

If you are upgrading to a PeopleSoft 9.0 or later application release, the data type update AND a minimum of Microsoft SQL Server 2005 are required. You will run a conversion process that will substitute the old data types for new ones. The data type conversion is supported for Microsoft SQL Server 2005 or later with PeopleTools 8.48 or later and an application release 9.0 or later. Examine the log file from the step Validating Microsoft Database to ensure that you are running a supported version of Microsoft SQL Server. Do NOT perform the rest of this task if you do not meet the qualifications.

Examine the log file from the step Running Long Data Audit to determine if there are any fields shorter than length 4000 in the database that exceed the actual data length defined for the PeopleSoft long character fields. Prior to PeopleTools 8.48, all PeopleSoft Long Character fields were created using the TEXT SQL Server data type, and no matter the length defined by the Application Designer, the data in the field could grow as much as the TEXT limits on SQL Server. After the data type conversion, the length specified in Application Designer will be enforced for all fields shorter than length 4000, except for those with length zero. If your data is larger than the length defined in Application Designer, then you must correct the length using Application Designer or change the data itself using your SQL query tool. You must decide whether you want a change in the field length definition or a change in the data. The log file created by LONGS-AUDIT.SQL will only show all the fields that contain data exceeding a length between 1 and 4000 and will be empty if this condition does not occur with no other action to take.

Resolve these problems before continuing to the next step, otherwise the conversion process will fail. If necessary, contact your DBA for assistance in modifying the fields. If no fields are listed in the log file, no further action is needed and you may proceed with the upgrade.

Note. During Move to Production passes, copy the MSSNEWTYPE_ALTER.SQL from your initial pass upgrade and place it into the output directory for your Move to Production job. This script is only generated during the initial pass.

Properties

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

Task 2-20-5: Creating Microsoft Conversion Project

This step runs MSSNEWTYPE.SQL, which generates and populates the MSSNEWTYPE project. The project contains all the records that need to be modified to use the newly supported data types.

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Properties

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

Task 2-20-6: Generating Microsoft Conversion Script

This step generates the SQL script MSSNEWTYPE_ALTER.SQL to alter the records in the MSSNEWTYPE project. The generated script will alter the tables with the new data types.

Properties

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

Task 2-20-7: Running Microsoft Conversion Script

This step runs the generated script from the previous step. This will alter the existing tables to use the new data types. All the tables will be copied into their new representation using the new data types and all the additional padding blanks derived from the use of the old data types will be truncated.

Properties

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

Task 2-20-8: Granting Permissions to the CONNECT ID

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

Properties

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

Task 2-20-9: Running Microsoft Conversion Report

This step runs CONVERSION-AUDIT.SQL, which audits for all unconverted fields. You will review the output in a later step.

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Properties

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

Task 2-20-10: Validating Oracle Database

This step runs the DBSETTINGS.SQL script, which queries the database in order to determine the value of the NLS_LENGTH_SEMANTICS parameter. You will review the output in a later step.

There are two possible conversions that may occur depending on whether or not the database is Unicode. The Long to LOB conversion will apply to all databases, Unicode or ANSI. CHARACTER LENGTH SEMANTICS (CLS) only applies to Unicode databases. The CLS conversion has a dependency on the init.ora parameter NLS_LENGTH_SEMANTICS. The init.ora parameter NLS_LENGTH_SEMANTICS=CHAR, must be enabled for PeopleSoft Enterprise Unicode databases prior to executing the conversion. If the database being converted is ANSI, then this setting is not necessary.

Properties

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

Task 2-20-11: Creating Oracle Audit Tables

This step runs PRECNVADT1A.SQL, which drops and re-creates some temporary tables required by the Pre-Conversion Audit SQR's.

If the tables being dropped, CHECK_CONSTRAINTS, DUPLICATE_CONSTRAINTS, and DROP_CONSTRAINTS, don't exist, the execution of this script will generate the following error, which can safely be ignored:

```
ORA-00942: table or view does not exist
```

Properties

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

Task 2-20-12: Auditing Duplicate Length Constraints

This step runs PRECNVADT1.SQR, which checks for duplicate length constraints. This condition can generally exist if the database was created using the Oracle Import utility and CONSTRAINTS=Y was enabled, which is the default setting. You will review the output in a later step.

Note. If this SQR needs to be rerun for any reason, you *must* run PRECNVADT1A.SQL before rerunning PRECNVADT1.SQR.

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Properties

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

Task 2-20-13: Auditing Disabled Constraints

This step runs PRECNVADT2.SQR, which checks for 'not_validated' constraints. Although this condition should not exist in a production database, it may have occurred if data was imported with external utilities, such as SQL Loader. You will review the output in a later step.

Properties

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

Task 2-20-14: Reviewing Oracle Settings

The data type conversion is only supported for Oracle 9i or later with PeopleTools 8.48 or later and an application release 9.0 or later. Do NOT perform the rest of this task if you do not meet the qualifications.

For Unicode databases, examine the log file from the step Auditing Duplicate Length Constraints. If there are any duplicate length constraints, those duplicate constraints must be dropped using a delivered utility SQL script. The utility SQL script *PS_HOME*\scripts\GENDROPDUPCONSTRAINTS.SQL, will generate a script DROPDUPCONSTRAINTS.SQL containing an ALTER TABLE *TABLE_NAME* DROP CONSTRAINT for every duplicate constraint found. Run the generated SQL to resolve the duplicate length constraints.

For Unicode databases, examine the log file from the step Auditing Disabled Constraints. If there are any disabled or nonvalidated constraints, these constraints should be re-validated using the delivered utility SQL script. This utility SQL script *PS_HOME*\scripts\GENREVALIDATECONSTRAINTS.SQL will generate a script REVALIDATECONSTRAINTS.SQL containing an ALTER TABLE *TABLE_NAME* ENABLE VALIDATE CONSTRAINT *CONSTRAINT_NAME* for every invalid constraint found. Run the generated SQL to enable the constraints.

For Unicode databases, examine the log file from the step Validating Oracle Database to determine if the values in the init.ora file are set properly. For Unicode databases, the NLS_LENGTH_SEMANTICS parameter needs to have a value of CHAR. This indicates that CHARACTER LENGTH SEMANTICS is enabled and the conversion can continue. If you need to enable Character Length Semantics, work with your DBA to modify the init.ora for the target database's SID and set NLS_LENGTH_SEMANTICS to CHAR. Then stop and restart the database SID for the setting to take effect.

Properties

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

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Task 2-20-15: Generating Oracle Conversion Scripts

Work with your database administrator to set the following init.ora parameters for the Target database's system identifier (SID). Stop and restart the database SID for the settings to take effect.

1. Set the following init.ora parameters:

```
db_block_size=8192
db_cache_size=325165824
db_file_multiblock_read_count=8
job_queue_processes=10
shared_pool_size=425829120
pga_aggregate_target=5871947670
parallel_max_servers=8
workarea_size_policy=AUTO
```

Note. If you are using Oracle 10g or higher, you may use the parameters SGA_TARGET=300M and SGA_MAXSIZE=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 you have at least six redo logs sized at 500 MB each.

The Oracle data types script generation program is a Java program that connects to an Oracle database. The prerequisites are the Oracle JDBC Drivers. The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the %ORACLE_HOME% environment variable is set. Check if the %ORACLE_HOME% environment variable is set, by typing the following at the workstation command prompt:

```
echo %ORACLE_HOME%;
```

This should return a path, for example:

```
c:\oracle\product\10.1.0\client_1;
```

If the %ORACLE_HOME% environment variable is not set, then set it in the command prompt window by typing the following at the workstation command prompt:

```
SET ORACLE_HOME=Oracle_Home_location;
```

The Oracle data types script generation program is executed via the *PS_HOME*\utility \PSORADataTypesConversion.BAT file, which requires five input parameters:

- THREADS – the number of Java threads the conversion script generation spawns to generate the scripts. We recommend 10 threads for running this program on Windows.
- ACCESSID – the access ID for the database to be converted
- ACCESSIDPW – the access password for the database to be converted
- DBNAME – the database name
- OUTPUTDIR – a directory path to redirect the generated conversion scripts to a user specified directory. This should be set to the Change Assistant output directory for your upgrade pass. Change Assistant will run the generated scripts later in the upgrade.

  Example:

```
PS_HOME\utility\PSORADataTypesConversion.bat THREADS SYSADM SYSADM MYDB c:⇒
```

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```
\upgrade\output\change_assistant_job_directory where THREADS = 10,  ACCESSID =⇒
 SYSADM, ACCESSIDPW = SYSADM, DBNAME = MYDB, and OUTPUTDIR = c:\upgrade\output⇒
\change_assistant_job_directory
```

Open a command prompt window on the client workstation and execute the Oracle data types script generation program by invoking *PS_HOME*\utility\PSORADataTypesConversion.bat. The program will display and write a log (PsOraCnv.log) to the specified directory specified by the OUTPUTDIR parameter indicating the status of the conversion program. Review PsOraCnv.log and ensure that the conversion scripts were generated cleanly.

For ANSI databases, only LONGTOLOBALTER conversion scripts are generated. For Unicode databases, two sets of scripts are generated: LONGTOLOBALTER conversion scripts and CHARACTERLENGTHSEMANTICSALTER scripts.

After successfully running the conversion program, verify that the generated .SQL scripts are located in the staging Change Assistant output directory for your upgrade pass. Later in the upgrade, Change Assistant will automatically run the SQL scripts later in the upgrade from the Change Assistant output directory for your upgrade pass.

Properties

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

Task 2-20-16: Running Long to LOB Script 1

This step runs LONGTOLOBALTER1.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-17: Running Long to LOB Script 2

This step runs LONGTOLOBALTER2.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-18: Running Long to LOB Script 3

This step runs LONGTOLOBALTER3.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion 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 2-20-19: Running Long to LOB Script 4

This step runs LONGTOLOBALTER4.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-20: Running Long to LOB Script 5

This step runs LONGTOLOBALTER5.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-21: Running Long to LOB Script 6

This step runs LONGTOLOBALTER6.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-22: Running Long to LOB Script 7

This step runs LONGTOLOBALTER7.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion 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 2-20-23: Running Long to LOB Script 8

This step runs LONGTOLOBALTER8.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-24: Auditing Long to LOB Conversion

This step runs L2LAUDIT.SQR to report on the output of the long to LOB conversion. You will review the report output in a later step.

Properties

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

Task 2-20-25: Running Character Length Script 1

This step runs CHARACTERLENGTHSEMANTICSALTER1.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-26: Running Character Length Script 2

This step runs CHARACTERLENGTHSEMANTICSALTER2.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion 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 2-20-27: Running Character Length Script 3

This step runs CHARACTERLENGTHSEMANTICSALTER3.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-28: Running Character Length Script 4

This step runs CHARACTERLENGTHSEMANTICSALTER4.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-29: Running Character Length Script 5

This step runs CHARACTERLENGTHSEMANTICSALTER5.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-30: Running Character Length Script 6

This step runs CHARACTERLENGTHSEMANTICSALTER6.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion 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 2-20-31: Running Character Length Script 7

This step runs CHARACTERLENGTHSEMANTICSALTER7.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-32: Running Character Length Script 8

This step runs CHARACTERLENGTHSEMANTICSALTER8.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-33: Auditing Character Length Semantics

This step runs CLSAUDIT.SQR to report on the output of the character length semantics conversion. You will review the report output in a later step.

Properties

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

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Task 2-20-34: Reviewing Conversion Reports

To review the conversion report for Microsoft, examine the log file from the step Running Microsoft Conversion Report. It contains a list of unconverted columns on tables along with its old data type. Fields on tables with no Application Designer definition will be included in this log. Any unresolved errors from the step Running Microsoft Conversion will also be included. If you are using these tables it is possible to update them manually to use the new data types with a SQL query tool or with an ETL tool. Be very cautious when changing a table as this could result in data loss or affected functionality. Once any underlying problems have been resolved, you may rerun all of the previous steps in this task to reconvert any remaining objects listed by the audit report.

Note. During Move to Production passes for Microsoft, you must manually convert any remaining objects. During Move to Production passes, the record definition differs from the database table structure, so do *not* build the record with Application Designer.

To review the conversion report for Oracle, examine the log files from running the LONGTOLOBALTER*.SQL scripts. If the database is Unicode, also examine the output of the CHARACTERLENGTHSEMANTICS* scripts. L2LAUDIT reports on any unconverted long VARCHAR and long raw columns. The tablename, columnname, and column data type are listed. CLSAUDIT reports on any unconverted character length columns (Unicode only).

Properties

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

Task 2-20-35: Updating Database Options

This step runs UPGDBOPTIONS_ENABLE.SQL. This script updates the database to indicate that the new data types are now enabled.

Properties

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

Task 2-21: Backing Up After 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.

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Properties

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

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CHAPTER 3

Run and Review Compare Reports

This chapter discusses:

- Understanding Compare Reports
- Preparing for Application Changes
- Renaming Tables
- Running New Release Compare Reports
- Reviewing New Release Compare Reports

Understanding Compare Reports

Now that your Copy of Production database is at the same 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 you have plenty of space to run these reports, as some can be rather large.

Task 3-1: Preparing for Application Changes

This section discusses:

- Exporting Project Definitions
- Importing Project Definitions
- Modifying UPGSYNCALL Compare Options
- Running Compare UPGSYNCALL
- Reviewing the UPGSYNCALL Compare Reports
- Copying the UPGSYNC Project
- Copying the UPGSYNC Project Definition
- Copying the UPGSYNCTEMP Project

Task 3-1-1: Exporting Project Definitions

In this step you will export from your Demo database the definition of projects that will be used later in this upgrade. You will import these definitions in the next step. Your export script is:

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```
DLUPX08E.DMS
```

Properties

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

Task 3-1-2: Importing Project Definitions

In this step you will import the project definitions into your Copy of Production database. These projects will be used later in this upgrade. Your import script is:

```
DLUPX08I.DMS
```

Properties

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

Task 3-1-3: Modifying UPGSYNCALL Compare Options

There are specific tables whose structure must match the record structure of the new PeopleSoft release. After the upgrade, the table's column sequence in the Copy of Production must match the record field sequence on the Demo database.

The synchronization of the two record structures will take place as outlined in the following table.

Task	Action Taken
Copy the UPGSYNC Project	Delete Table record definitions from the Copy of Production
Copy the UPGSYNCTEMP Project	Delete Temporary Table record definitions from the Copy of Production
Altering the UPGSYNC Records	Affected tables altered using "By Rename" option, forcing the column sequence to match the record definition.
Modifying the Database Structure	Affected Temporary tables recreated.

Because the Copy of Production record definitions will be deleted before the full database compare, you must identify your customizations on the affected records before those customizations are lost when the records definitions are deleted. In this step and the following two steps, you will perform these actions:

- Verify upgrade compare options and modify them based on your requirements.
- Run Compare UPGSYNCALL to generate record compare reports.
- Review the UPGSYNCALL compare reports to evaluate the effect of the project copies on your customizations.

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The UPGSYNCALL project contains all of the records that are in projects UPGSYNC and UPGSYNCTEMP. You will not be *copying* project UPGSYNCALL to the Copy of Production. The only purpose of the UPGSYNCALL project is to allow you to identify your customizations.

You will reapply your customizations in the task, "Reapplying Customizations."

To modify upgrade compare options:

1. Highlight the Running Compare UPGSYNCALL step and right-click.
2. Select Step Properties.

   The Step Properties dialog box appears.
3. Click Upgrade.

   The Compare and Report dialog box appears.
4. Click Options.
5. Select the Report Filter tab.

   The default options include your custom changes on the reports.
6. Change the default options as necessary.

Properties

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

Task 3-1-4: Running Compare UPGSYNCALL

This step generates record compare reports. Application Designer is used to compare the UPGSYNCALL project on your Copy of Production to the Demo database.

See Appendix: "Using the Comparison Process."

Note. For Sybase customers only: check the configuration parameter for "open objects." If this parameter is set too low, you may encounter the following error: "ct_connect(): network packet layer: internal net library error" during the compare or copy process. If you encounter this error, increase the value of this parameter.

Properties

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

Task 3-1-5: Reviewing the UPGSYNCALL Compare Reports

In this step, you review the UPGSYNCALL compare reports to evaluate the effect on your customizations.

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The UPGSYNCALL project was compared in the previous step so that you can review the differences between the version of the records on the Demo database and your Copy of Production database. The compare process produced compare reports, which you can view by opening the project in Application Designer on the Demo database. Use the compare reports to determine if you have customized any of these records. Record definitions that you have changed will have *Changed or *Unchanged in the Target column of the compare report (the * means the change was not made by PeopleSoft). Review these reports carefully. Note the changes you made to the records, and after the upgrade is complete and you are testing the system, decide whether you still need the customizations. You can reapply the customization at that time.

There may be records for which the Target column reads Absent. This indicates that you do not have the record on your Copy of Production database. You can ignore these records, because you are concerned only with customized records in this step.

Change Assistant saves the compare reports in the "Output" folder that you specified in your Change Assistant job "Database Configuration." The file names are Upg00Records.prt and Upg00Records.idx.

Important! These same file names will be used in the full database compare later in the upgrade. To avoid losing the customization details, save the two compare report files in a separate folder before proceeding.

See Appendix: "Using the Comparison Process."

Properties

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

Task 3-1-6: Copying the UPGSYNC Project

In this step, you copy the UPGSYNC project to the Copy of Production database. This will delete the record definitions for tables whose field sequence is critical. These records will be copied from the Demo database to your Copy of Production database when you run the "Import New Release Objects" step. This project is used later in the upgrade in the "Altering the UPGSYNC Records" task.

Properties

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

Task 3-1-7: Copying the UPGSYNC Project Definition

In this step, you copy the UPGSYNC project definition to the Copy of Production database. This project is used later in the upgrade, in the "Altering the UPGSYNC Records" task.

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Properties

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

Task 3-1-8: Copying the UPGSYNCTEMP Project

In this step, you copy the UPGSYNCTEMP project to the Copy of Production database. This will delete the temporary table record definitions whose field sequence is critical. These records will be copied from the Demo database to your Copy of Production database when you run the "Import New Release Objects" step.

Properties

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

Task 3-2: Renaming Tables

This section discusses:

- Understanding Renamed Tables
- Running the RNPFN01MSS Script
- Running the RNPFN01DB2 Script
- Running the RNPFN01DBX Script
- Running the RNPFN01ORA Script
- Running the RNPFN02MSS Script
- Running the RNPFN02DB2 Script
- Running the RNPFN02DBX Script
- Running the RNPFN02ORA Script

Understanding Renamed Tables

These SQL scripts rename tables, at the database level, to temporary table names. They do not change the Record Definition. These temporary tables will be used in the data conversion programs in a later step.

Near the end of the upgrade tasks, you will run a DDDAUDIT report again. On the report, these temporary tables will be listed in the section listing: "SQL Table defined in the Database and not found in the Application Designer." Either at that point or later when you are comfortable with the results of the data conversion, you can drop these temporary tables.

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In some database platforms, the related indexes and views must be dropped before the table can be renamed. PeopleSoft has included drop statements for these objects that exist on the DMO version of the database. However, the list of related objects may be different in your environment because of customizations or applied product incidents. You may encounter errors in these scripts because of these differences—for example, the script tries to drop an index that you do not have or it cannot rename the table because there are more related objects that need to be dropped. Simply modify these scripts to work for your database and you will not encounter these errors in your next test pass.

Task 3-2-1: Running the RNPFN01MSS Script

RNPFN01MSS.sql will rename tables on the Copy of Production database. This script is for SQL Server databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-2: Running the RNPFN01DB2 Script

RNPFN01DB2.sql will rename tables on the Copy of Production database. This script is for DB2 z/OS databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-3: Running the RNPFN01DBX Script

RNPFN01DBX.sql will rename tables on the Copy of Production database. This script is for DB2 UDB databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-4: Running the RNPFN01ORA Script

RNPFN01ORA.sql will rename tables on the Copy of Production database. This script is for Oracle databases and will run in the initial and Move to Production passes.

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Properties

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

Task 3-2-5: Running the RNPFN02MSS Script

RNPFN02MSS.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for SQL Server databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-6: Running the RNPFN02DB2 Script

RNPFN02DB2.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for DB2 z/OS databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-7: Running the RNPFN02DBX Script

RNPFN02DBX.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

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This script is for DB2 UDB databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-8: Running the RNPFN02ORA Script

RNPFN02ORA.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for Oracle databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-3: Running New Release Compare Reports

This section discusses:

- Understanding the New Release Compare
- Preserving Local Message Node
- Modifying New Release Compare Options
- Running New Release UPGCUST Compare
- Running New Release UPGCUSTIB Compare
- Resetting Take Action Flags in UPGCUST
- Running UPGCUSTIB Filter Script

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.

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Task 3-3-1: Preserving Local Message Node

In this step add your Local Message Node to the UPGCUST project before the project compare between the Copy of Production and Demo database.

To add Local Message Node:

1. Run the following SQL in your Copy of Production database to identify your Local Message Node:

   ```
   SELECT MSGNODENAME FROM PSMSGNODEDEFN WHERE LOCALDEFAULTFLG = 'Y'
   ```

2. Open Application Designer from your Copy of Production database.
3. Open project UPGCUST.
4. Select Insert, Definitions Into Project.
5. Select Definition Type of Message Node.
6. Enter the Message Node name that was returned from the SQL you ran above.
7. Select the displayed Message Node.
8. Click Insert.
9. Save project UPGCUST.

Properties

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

Task 3-3-2: Modifying New Release Compare 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 Change Assistant template step properties for each compare step in this task and modify the compare options based on your requirements.

If you decide not to modify the compare options, the objects are still compared. However, the results are only available online in Application Designer. They 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 Application Designer.

For example, you can modify the compare options so 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 Application Designer, after the compare.

To modify upgrade compare options:

1. Highlight the compare step you want to review and right-click.
2. Select Step Properties.

   The Step Properties dialog box appears.
3. Click Upgrade.

   The Compare and Report dialog box appears.

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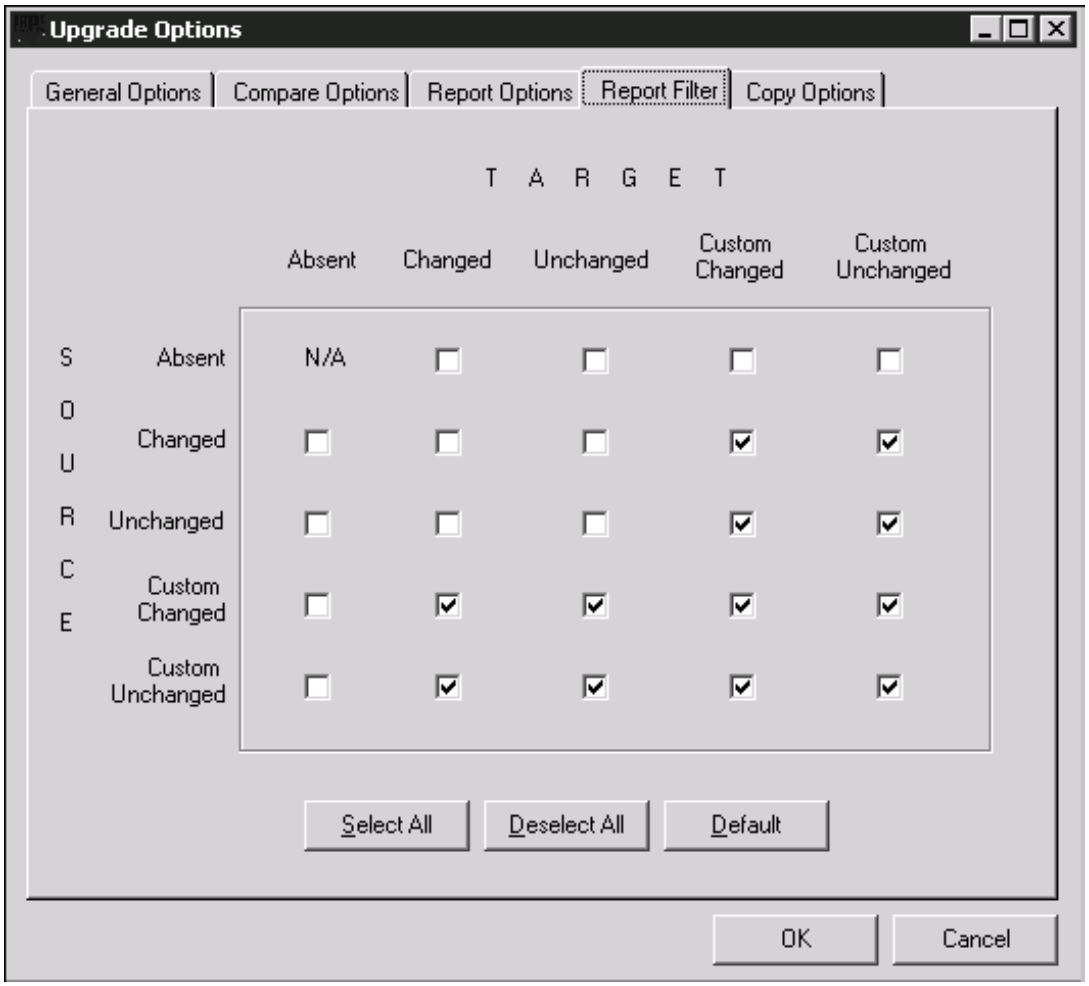
4. Click Options.
5. Select the Report Filter tab.

   The default options include your custom changes on the reports.
6. Change the default options as necessary and click OK.



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 1 through 8 for each compare step in the task you want to review and change.
10. Select File, Save Job.

Properties

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

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Task 3-3-3: Running New Release UPGCUST Compare

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

Properties

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

Task 3-3-4: Running New Release UPGCUSTIB Compare

This step executes a database compare of all Integration Broker objects and generates the UPGCUSTIB project.

Properties

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

Task 3-3-5: Resetting Take Action Flags in UPGCUST

This step turns *off* all Take Action flags in the UPGCUST project after the compare. You will analyze the compare results and adjust the upgrade flags in the next step.

The script for your upgrade is:

```
DLUPX98.DMS
```

See Appendix: "Using the Comparison Process."

Properties

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

Task 3-3-6: Running UPGCUSTIB Filter Script

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

The script name for your upgrade is:

```
DLUPX95.DMS
```

See Appendix: "Using the Comparison Process."

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Properties

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

Task 3-4: Reviewing New Release Compare Reports

This section discusses:

- Reviewing New Release Changes
- Reviewing NonComparable Objects

Task 3-4-1: Reviewing New Release Changes

In this step, review the UPGCUST and UPGCUSTIB projects to evaluate how changes in the new release affect your customizations.

The UPGCUST and UPGCUSTIB projects exist in your Copy of Production database and contain all the objects you customized in the old release. These projects may include object definitions that are on your Copy of Production database but are not on the Copy of Current Demo database. If these are custom objects that you intend to keep in your upgraded system, you will want to ensure they are set to copy in the UPGCUST or UPGCUSTIB project. Compare reports are viewable when you open the projects in Application Designer. You can use these reports to determine your copy action for each object in the projects. Currently all Upgrade Flags are deselected, meaning no action will take place. Analyze the UPGCUST and UPGCUSTIB projects and select the Upgrade Flags for the customizations you wish to retain.

If the Target column has the value *Absent* it can indicate one of two possible conditions. If PeopleSoft 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 PeopleSoft-delivered objects. If you have made a customization to an obsolete object, refer to the product's Release Notes to assess the functionality of the customization and determine where to reapply it in the new release

See Appendix: "Using the Comparison Process."

Warning! Pay close attention to 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 Application Designer to retain these customizations.

Note. Steps in the database and/or third-party software installation documentation can result in PeopleSoft-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.

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Properties

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

Task 3-4-2: Reviewing NonComparable Objects

The UPGNONCOMP project is delivered in your Demo database. It contains object definitions that cannot be compared using 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.

Properties

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

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CHAPTER 4

Apply Application Changes

This chapter discusses:

- Understanding Application Changes
- Customizing the New Release
- Running New Release Upgrade Copy
- Updating Database Overrides
- Backing Up After the Upgrade Copy
- Altering the UPGSYNC Records
- Modifying the Database Structure
- Loading Data for Data Conversion
- Restoring New Release Demo
- Applying Updates Before Data Conversion
- Configuring Scheduler and Server
- Backing Up Before Data Conversion
- Running Data Conversion
- Backing Up After Data Conversion
- Finalizing the Database Structure
- Preparing for Mass Compile of Metadata
- Loading Data to Complete System Setup
- Loading Personalizations
- Completing Application Conversion
- Updating Language Data
- Completing PeopleTools Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports

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Understanding Application Changes

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

Task 4-1: Customizing the New Release

This section discusses:

- Understanding New Release Customizations
- Copying the UPGCUST Project
- Reviewing Copy Results

Understanding New Release Customizations

In this task, the UPGCUST project is copied from the Copy of Production database to the Demo database.

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 duringthe compare or copy process`. If you encounter this error, you need to increase the value of this parameter accordingly.

Task 4-1-1: Copying the UPGCUST Project

This step copies your customized 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 4-1-2: 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 Application Designer that each of the projects copied shows the Done options are checked for those objects you expected to be copied.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. For example, if you chose not to copy a record definition, but neglected to clear the PeopleCode Upgrade check box for that record, you will receive errors when trying to copy the PeopleCode. Application Designer maintains PeopleTools integrity during the copy and will not copy PeopleCode for records that do not exist.

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Review any errors you receive during the copy process and determine whether they are acceptable cases or unacceptable errors that need correction. In the example above, either the PeopleCode error is acceptable because you do not intend to copy the record definition, or the error is unacceptable and you should copy the record and then copy the PeopleCode for that record again.

You may get messages similar to "Warning: FIELDNAME is a key field and has been appended to the end of the RECORDNAME record." This is an acceptable message and you can ignore it.

The following error occurs when copying a Portal Registry Structure that has a different PORTAL_OBJNAME but the same PORTAL_URLTEXT as an existing registry object.

```
Duplicate Key. Portal: portalname, Obj name: objectname, CP: nodename, URL (1st 50⇒
 char): URL
```

Properties

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

Task 4-2: Running New Release Upgrade Copy

This section discusses:

- Exporting Selected PeopleTools Tables
- Importing Selected PeopleTools Tables
- Copying the UPGCUSTIB Project
- Swapping PeopleTools Tables
- Creating the UPGIBCOPY Project
- Copying the UPGIBCOPY Project
- Updating Target Values
- Copying the UPGNONCOMP Project
- Reviewing Project Copy Results
- Exporting New Release Objects
- Importing New Release Objects
- Resetting Object Version Numbers
- Backing Up New Release Demo Again

Task 4-2-1: Exporting Selected PeopleTools Tables

Depending on your upgrade path you will need to export one or more PeopleTools tables to preserve values on your Copy of Production database. This step exports PeopleTools tables in the Copy of Production before the upgrade copy has occurred.

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The script for your upgrade path is:

```
DLUPX96E.DMS
```

Properties

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

Task 4-2-2: Importing Selected PeopleTools Tables

Depending on your upgrade path you will need to import one or more PeopleTools tables to preserve values on your Copy of Production database. This step imports PeopleTools tables into the Demo database before the upgrade copy occurs.

The script for your upgrade path is:

```
DLUPX96I.DMS
```

Properties

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

Task 4-2-3: Copying the UPGCUSTIB Project

This step copies your customized Integration Broker objects from the Copy of Production database to your Demo database.

See Customizing the New Release, Reviewing Copy Results.

Properties

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

Task 4-2-4: Swapping PeopleTools Tables

This step swaps the base language for tables that contain PeopleTools Managed Object data and related language data on your Demo database. This is in preparation for the next 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:

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1. Select the step Swapping PeopleTools Tables in Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from ManualStop to DataMoverUser.
4. Click OK twice.

Properties

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

Task 4-2-5: Creating the UPGIBCOPY Project

In this step, you create the UPGIBCOPY project and use it to upgrade your Integration Broker objects to the new release.

To create the UPGIBCOPY project:

1. Launch PeopleTools and sign on to the New Release Demo database.
2. From Application Designer, select File, New…
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project…
5. Select *Messages* from the Object Type drop-down list box.
6. Click Insert, and then click Select All.
7. Click Insert.
8. Repeat steps 5, 6, and 7 for the following object types:
   - Services
   - Service Operations
   - Service Operation Handlers
   - Service Operating Versions
   - Service Operation Routings
   - IB Queues
9. Click Insert, and then click Close.
10. Select File, Save All.
11. Enter the project name UPGIBCOPY.

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

12. Click OK.

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Properties

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

Task 4-2-6: Copying the UPGIBCOPY Project

In this step, copy all objects in the project, UPGIBCOPY. This project consists of PeopleSoft-delivered Integration Broker objects as well as any customizations you may have selected to copy to the New Release Demo in a previous step.

See Copying the UPGCUSTIB Project.

Properties

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

Task 4-2-7: Updating Target Values

This step updates the Message Node table on the Demo database to keep the assignment of the Local Node defined in the Copy of Production. The update uses the copy of the Message Node table taken earlier in the upgrade.

The script for your upgrade path is:

```
DLUPX97.DMS
```

Properties

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

Task 4-2-8: Copying the UPGNONCOMP Project

In this step, copy the non-compare project, UPGNONCOMP. This project consists of object types you cannot compare and object types not included in your compare project. In a previous step, you reviewed this PeopleSoft-delivered project and modified the Upgrade check box for any objects you did not want to copy.

Properties

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

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Task 4-2-9: Reviewing Project Copy Results

Review the results of the UPGCUSTIB, UPGIBCOPY, and UPGNONCOMP project copy steps that were performed earlier in this task. Review each copy log for any errors and verify in Application Designer that the Done options are checked for the objects in each of the projects. To verify Done options for UPGIBCOPY and UPGNONCOMP, you would log in to the Demo database, whereas to verify Done options for UPGCUSTIB, you would log in to your Copy of Production database.

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

Properties

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

Task 4-2-10: 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 4-2-11: 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 4-2-12: 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.

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Note. You will rerun the VERSION Application Engine program later in the upgrade. If you want to preserve the log files generated by Change Assistant from this run, you will need to manually rename the files after completing this step.

Properties

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

Task 4-2-13: Backing Up New Release Demo Again

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

Properties

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

Task 4-3: Updating Database Overrides

This section discusses:

- Understanding Database Overrides
- Set Index Parameters After Copy
- Set Tablespace Names After Copy
- Set Record Parameters After Copy
- Create New Tablespaces

Understanding Database Overrides

In this task, you update PeopleTools tables with DDL information from your physical database DDL. You may have overwritten information about where tables exist in your database during the copy project steps of this upgrade. The following steps synchronize your PeopleTools table definitions with your database again.

Task 4-3-1: Set 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
```

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Properties

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

Task 4-3-2: Set 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 PeopleSoft-delivered names, this process makes those same changes in the PeopleSoft 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 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 Create New Tablespaces.

Properties

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

Task 4-3-3: Set Record Parameters After Copy

This step updates table overrides stored in the PSRECDDLPARM table. The values stored in the PARMVALUE field are updated with the current values found in the system catalog. The name of the process is:

```
SETTABLE.SQR
```

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Properties

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

Task 4-3-4: Create New Tablespaces

This section discusses:

- Prerequisites
- Creating PeopleSoft Delivered Tablespaces
- Creating Custom Tablespaces

Prerequisites

Before you perform this step, you must make sure your database administrator has created all new tablespaces that will be used in new tables.

Note. DB2 z/OS sites need to create databases as well as tablespaces at this time.

Creating PeopleSoft Delivered Tablespaces

If you use PeopleSoft-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 Set Tablespace Names After Copy.

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

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

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

Note. PeopleSoft reassigned some tables to larger tablespaces because they now require a 32-KB buffer pool. You must manually edit the Create Table statements in the upgrade scripts to replace the tablespace names with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool.

The script name is:

```
PFDDL.SQL (PFDDLU.SQL for DB2 z/OS Unicode)
```

Important! For DB2 UNIX/NT sites, the script name is `PFDDLDMS.SQL` for ANSI, and `PFDDLDMSU.SQL` for Unicode.

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DB2 z/OS sites must also consider how database names are assigned. After the upgrade/copy is completed, some of the PeopleTools metadata tables in your Copy of Production database will contain the database values from the Demo database. Review the SETSPACE SQR report for those tables that are reported as not defined in the database. If the report shows your Demo database names instead of your Copy of Production database names you can reset them with the following SQL:

```
UPDATE PSRECTBLSPC SET DBNAME = 'Copy of Production dbname'
WHERE DBNAME = 'Demo dbname'
```

Creating Custom Tablespaces

If you will use custom tablespaces, create those tablespaces now. Choose one of the following two methods to get the information into PeopleTools:

- Update PeopleTools for each record you will put into a custom tablespace. You can do this directly through 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 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 PeopleTools with the correct tablespaces or database/tablespace in DB2 z/OS. The report should be empty at that time.

Note. For DB2 z/OS sites, the SETSPACE report may list some database/tablespace combinations as "Table Undefined - DB/TS OK" when in fact the database name is one that was defined for your Demo database. This occurs if your Demo and Copy of Production databases are in the same DB2 subsystem. The SETSPACE.SQR detected that the database/tablespace combinations do exist in the subsystem and are therefore valid. Make sure that you update these database/tablespace names to match those that exist in your Copy of Production, using the instructions above.

Note. During the Move to Production pass, you will create these tablespaces when you populate tablespace data. You can reuse this script, or you can create a new script for your production environment. To reuse the script you have created for this task, save it and copy it into the PS_HOME\SCRIPTS directory that you use during the Move to Production pass.

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See the Enterprise PeopleTools Installation for DB2 UDB for z/OS for your new release, “Creating a Database,” Correcting Invalid Database/Tablespace Combinations.

See Modifying the Database Structure, Editing the Create and Alter Scripts.

See Modifying the Database Structure, Setting Tablespace Names.

See “Apply PeopleTools Changes,” Populating Tablespace Data.

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 UNIX/NT	All

Task 4-4: Backing Up After the 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 4-5: Altering the UPGSYNC Records

This section discusses:

- Understanding UPGSYNC Records Alteration
- Building the UPGSYNC Alter Script
- Editing the UPGSYNC Alter Script
- Running the UPGSYNC Alter Script

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Understanding UPGSYNC Records Alteration

In this task you will alter the records that are in the UPGSYNC project. These are records whose field sequence is critical. Not only must the recfield sequence on your database match that of the new PeopleSoft release database, but the associated table's column sequence must also match the record definition. In order to keep the physical table synchronized with the record definition, you will alter the tables using the "by rename" option.

Task 4-5-1: Building the UPGSYNC Alter Script

This step generates the SQL script to alter all records in the UPGSYNC project. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Obsolete columns will still exist on the tables after this script is executed, and will be dropped in the task titled, "Finalizing the Database Structure." The script is built using the "by rename" option in order to control column sequence. Do not change it to use the "in place" option. The script name is:

```
UPGSYNC_ALTTBL.sql
```

Note. You may see warning messages like this:

Warning: *record name* - alter failed because SQL table does not exist. (76,7)

These messages are returned because there are records in the UPGSYNC project that have no associated table in your database. Ignore these messages.

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

Properties

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

Task 4-5-2: Editing the UPGSYNC Alter Script

In this step, you will edit the SQL alter scripts for tablespace names and sizing. The script name for your upgrade path is:

```
UPGSYNC_ALTTBL.sql
```

If you are running on a RDBMS platform that uses tablespaces and you are not using the PeopleSoft tablespace names, you will need to review and modify the scripts above. When the new record was copied to the Copy of Production database, the PeopleSoft default tablespace name was copied as well. When you created the tablespace, you were given the option to correct the tablespace names online or to wait and edit the scripts.

See "Apply Application Changes," Create New Tablespaces.

After you have completed running these scripts you will run the programs that synchronize the PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleTools definition. Have your DBA review these scripts and modify the tablespace names appropriately.

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Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors.

Properties

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

Task 4-5-3: Running the UPGSYNC Alter Script

In this step, you will run the SQL script you generated to alter the records in project UPGSYNC. This step will alter existing PeopleSoft table structures to use with your new PeopleSoft release. The script name for your upgrade path is:

```
UPGSYNC_ALTTBL.sql
```

Properties

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

Task 4-6: Modifying the Database Structure

This section discusses:

- Understanding Modifying the Database Structure
- Backing Up for DB2
- Building the Upgrade Tables Script
- ReCreating Upgrade Tables
- Creating the ALLTEMPTABS Project
- Building the Create Temp Tables Script
- Creating the ALLTABS Project
- Building the Create and Alter Scripts
- Editing the Create and Alter Scripts
- Creating Temporary Tables
- Creating Tables

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- Altering Tables
- Creating Indexes
- ReCreating Triggers
- Reviewing the Create Indexes Log
- Setting Index Parameters
- Setting Temp Table Tablespace Names
- Setting Tablespace Names
- Setting Record Parameters
- Generating a DB2 UNIX RUNSTATS Script
- Updating Statistics for DB2 UNIX
- Updating Statistics for DB2 zOS
- Updating Statistics for Informix
- Updating Statistics for Oracle

Understanding Modifying the Database Structure

In this task you create and run various scripts and processes that will modify your database structure, including creating new tables and indexes, altering tables that have changed, and re-creating modified indexes.

Note. In the Change Assistant job, some of the steps may complete without error, but display a Warning icon indicating that warning messages exist in the log file.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release, “Error Handling.”

Task 4-6-1: 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 4-6-2: Building the Upgrade Tables Script

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

The script name for your upgrade path is:

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```
UPGCONVERT_CRTTBL.SQL
```

Properties

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

Task 4-6-3: ReCreating 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 4-6-4: Creating the ALLTEMPTABS Project

This step creates a project named ALLTEMPTABS and inserts all records of the type *Temporary Table*.

Properties

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

Task 4-6-5: Building the Create Temp Tables Script

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

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Task 4-6-6: 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 4-6-7: Building the Create and Alter Scripts

This step generates the SQL script to create all new records of the type *Table*. The script name is:

```
ALLTABS_CRTTBL.SQL
```

This step generates the SQL script to alter all existing records of the type *Table*. This script is referred to as Alter Without Deletes. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Columns that will eventually be deleted will still exist on the tables after this script is executed. The script name is:

```
ALLTABS_ALTTBL.SQL
```

This step also generates the SQL script to create new indexes and to re-create modified indexes as needed for the tables in the first two scripts. The script name is:

```
ALLTABS_CRTIDX.SQL
```

Note. This step also creates the script ALLTABS_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, because all database triggers will be created in the “Finalizing the Database Structure” task.

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

See Finalizing the Database Structure.

Properties

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

Task 4-6-8: 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:

```
ALLTEMPTABS_CRTTBL.SQL
ALLTABS_CRTTBL.SQL
ALLTABS_ALTTBL.SQL
ALLTABS_CRTIDX.SQL
```

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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, "Create 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 PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleTools definition. Have your database administrator review these scripts and modify the tablespace names appropriately.

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors. After the upgrade is complete, you may want your database administrator to review and make adjustments to the amount of free space left in some of the tables or tablespaces.

Properties

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

Task 4-6-9: Creating Temporary Tables

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 4-6-10: Creating Tables

This step runs the SQL script you generated to create all the records of the type *Table*. This step creates new table structures in your database. The script name for your upgrade path is:

```
ALLTABS_CRTTBL.SQL
```

Properties

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

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Task 4-6-11: Altering Tables

This step runs the SQL script you generated to alter the existing records of type *Table*. This step alters existing PeopleSoft table structures to comply with your new PeopleSoft release.

The script name for your upgrade path is:

```
ALLTABS_ALTTBL.SQL
```

Properties

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

Task 4-6-12: 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 4-6-13: ReCreating Triggers

This step executes the script CREATETRGR.DMS, which will re-create all PeopleSoft triggers in the database. The triggers on PeopleSoft tables were invalidated when the tables were altered and need to be re-created.

Properties

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

Task 4-6-14: Reviewing the Create Indexes Log

When 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.

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The log file name for your upgrade path is:

```
ALLTABS_CRTIDX.LOG
```

See Running Data Conversion.

See Finalizing the Database Structure.

Properties

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

Task 4-6-15: 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	Oracle DB2 z/OS	All

Task 4-6-16: Setting Temp Table Tablespace Names

This step populates the 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.

```
SETTMPIN.SQR
```

Properties

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

Task 4-6-17: 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 PeopleSoft-delivered names, this will make those same changes in the PeopleSoft record definition. The name of the process is:

```
SETSPACE.SQR
```

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Properties

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

Task 4-6-18: Setting Record Parameters

This step updates table overrides stored in the PSRECDDLPARM table. The values stored in the PARMVALUE field are updated with the current values found in the system catalog. The name of the process is:

```
SETTABLE.SQR
```

Properties

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

Task 4-6-19: Generating a DB2 UNIX RUNSTATS Script

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update the statistics on DB2 UNIX/NT.

Properties

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

Task 4-6-20: Updating Statistics for DB2 UNIX

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again. Run the RUNSTATS.SQL script created in the previous step to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

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

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Task 4-6-21: 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 4-6-22: Updating Statistics for Informix

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

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

Task 4-6-23: 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 4-7: Loading Data for Data Conversion

This section discusses:

- Swapping Languages on System Data
- Exporting Application Messages
- Importing Application Messages
- Exporting Record Groups

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- 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 Upgrade Defaults
- Importing Upgrade Defaults
- Exporting Data Conversion Driver Data
- Importing Data Conversion Driver Data

Task 4-7-1: Swapping Languages on System Data

This script swaps the base language for tables that contain system data on your Demo database and have related language data, in preparation for the system data exports in the next step. This script should be run only if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
DLPFLASWAP.DMS
```

If you want to make this step automated, select the step Swap Languages on System Data in Change Assistant, open the Step Properties dialog box, change the Type from ManualStop to DataMoverUser, and click OK twice.

Properties

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

Task 4-7-2: 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

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Task 4-7-3: Importing Application Messages

This step imports Application Message data into your Copy of Production database. Message Sets 0-999 are overlaid during the 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 again in future maintenance or upgrades, add your custom messages in a set range of 20,000 or greater.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

```
DLUPX01I.DMS
```

Properties

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

Task 4-7-4: 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 4-7-5: 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

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The import script deletes from, and then reloads, the Record Group tables, REC_GROUP_REC and REC_GROUP_TBL. These are the tables that are modified when you use PeopleTools, Utilities, Administration, Record Group. The script then rebuilds the related setID tables, PS_SET_CNTRL_GROUP and PS_SET_CNTRL_REC. The PS_SET_CNTRL_TBL and PS_SETID_TBL tables contain the setIDs you use in your system; this script does not update PS_SET_CNTRL_TBL. However, it does check for orphan setID references in PS_SET_CNTRL_REC and adds the missing setIDs to PS_SETID_TBL.

If you have moved a PeopleSoft-delivered record into a custom added record group, and deleted the record from the PeopleSoft-delivered record group, this script will put the record back into the PeopleSoft-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 PeopleSoft-delivered record groups in the new release. To continue using your custom record group, you will need to re-create it in the Reapply Customizations task.

This script creates an output file and uses it to create a temporary table. To run successfully, the Configuration Manager input and output 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 4-7-6: 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

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Task 4-7-7: Importing the System Setup Data

This script imports the data exported in the previous step into your New Copy of Production database during your Move to Production passes. This script replaces many scripts that you ran in the initial pass. It will move all data in these tables so that any customizations you have added to these tables during your initial pass will be moved to your New Copy of Production database. Also, it will rebuild the Set Control tables using the Record Groups from the Copy of Production database and your current Set Control values on the New Copy of Production database. The script name for your upgrade path is:

```
MVAPPIMP.DMS
```

Properties

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

Task 4-7-8: 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 is:

```
DLUPX14E.DMS
```

Properties

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

Task 4-7-9: 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 is:

```
DLUPX14I.DMS
```

Properties

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

Task 4-7-10: 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 is:

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```
MVUPX16E.DMS
```

Properties

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

Task 4-7-11: 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 is:

```
MVUPX16I.DMS
```

Properties

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

Task 4-7-12: 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 "Prepare Your Database" of your initial upgrade pass. You will load this information into your New Copy of Production later in the Move to Production upgrade pass. The script name for your upgrade path is:

```
MVPFNEXP.DMS
```

See "Prepare Your Database."

Properties

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

Task 4-7-13: Importing Upgrade Defaults

This script imports the upgrade default data values and mapping that you set up during the chapter "Prepare Your Database," of your initial upgrade pass. The script name for your upgrade path is:

```
MVPFNIMP.DMS
```

See "Prepare Your Database."

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Properties

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

Task 4-7-14: Exporting Data Conversion Driver Data

This step exports data conversion Application Engine driver data from the Demo database. The script name for your upgrade path is:

```
DLUPX03E.DMS
```

Properties

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

Task 4-7-15: Importing Data Conversion Driver Data

This step imports data conversion Application Engine driver data into your Copy of Production database.

The script name for your upgrade path is:

```
DLUPX03I.DMS
```

Properties

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

Task 4-8: Restoring New Release Demo

Restore your New Release Demo database from the backup you took in Chapter 1 earlier in the upgrade. The backup was taken before projects were copied and scripts were run against the Demo database. This is done to restore the environment to the original Demo database.

Properties

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

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Task 4-9: Applying Updates Before Data Conversion

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

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

See Appendix: "Applying Fixes Required for Upgrade."

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

To apply PeopleSoft project fixes before data conversion:

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

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release.
3. The project is now loaded on your Demo database. You should run a project compare to make sure the objects in the fix will not overwrite any of your customizations. If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.
4. If you are performing a Move to Production upgrade pass, first migrate the Change Packages into the Source database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the Change Package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply it to the Source database.

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release, "Applying Updates."
5. Migrate the Change Packages into the Target database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Target database.

Properties

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

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Task 4-10: Configuring Scheduler and Server

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

Tips for configuring and starting the application server:

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

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

See Appendix: "Improving Performance."

Properties

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

Task 4-11: Backing Up Before Data Conversion

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

Properties

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

Task 4-12: Running Data Conversion

This section discusses:

- Reviewing Data Conversion Tips
- Running Data Conversion for Group 1
- Running Data Conversion for Group 2
- Running Data Conversion for Group 3
- Running Data Conversion for Group 4
- Running Data Conversion for Group 5

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- Running Data Conversion for Group 6

Note. 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. The Upgrade Driver Application Engine program, UPG_DATACONV, will run all upgrade data conversions.

Task 4-12-1: Reviewing Data Conversion Tips

This section discusses:

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

Upgrade Driver Program − UPG_DATACONV

UPG_DATACONV is an Application Engine program designed to run all upgrade data conversions. Each time the program is run during an upgrade pass, Change Assistant passes a group number parameter to the program. The program then reads the table PS_UPG_DATACONV, selecting all rows with that group number and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. You can review the sections that are called by the Upgrade Driver program by accessing the Define Upgrade Drivers page on the Demo database.

Data Conversion Documentation

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

See Appendix: "Using Data Conversion Utilities."

Running Data Conversion Concurrently

Each data conversion step in this task corresponds to a group number as defined in the Define Upgrade Drivers page. Each group is independent of the others unless otherwise documented, allowing the groups to be run concurrently. PeopleSoft recommends that you run data conversion in the order it appears in your template during the initial upgrade pass to determine processing times. This is why the Change Assistant templates are delivered with the data conversion steps' "Run Concurrently" property set to "No." To reduce overall processing time during your Move to Production passes, you may decide to run some or all conversion steps concurrently. To run steps concurrently, reset the "Run Concurrently" property to "Yes" in your Change Assistant template.

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

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Writing Data Conversion for Your Non-PeopleSoft Records

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

See Appendix: "Using Data Conversion Utilities."

Data Conversion Errors Expected During the Initial Upgrade Pass

During your initial upgrade pass you can expect to have data conversion programs fail. This is because your PeopleSoft installation is unique, which makes it difficult to write data conversions that will work for everyone all of the time. Your database may be larger than most, you may have customized PeopleSoft-defined records, 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 PeopleSoft, you may need to make changes to the Application Engine programs to handle these customizations. For example, here are two situations in which you may need to customize data conversion code:

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

Use the Find In feature of 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 through PeopleSoft Customer Connection, you will know exactly what changes you have made. You can then reapply the changes to the new version of the program.

If your database is large, you may have data conversion programs that fail due to running out of space as you move data from one table to another. This problem can happen on all 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.

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If you get a data conversion error because a field does not exist on a table, and the field is not one you have customized, check your field renames. If a field that appears on a record that is deleted in the new PeopleSoft release but was not deleted in your compare and copy, your table will be out of sync with what is expected by data conversion. If you had deleted the record, the rename would not happen on the physical table and the field would have the old name. This is what the data conversion program expects. If you did not delete the record, the field was renamed during the altering of tables and the data conversion program will terminate abnormally. Edit the Application Engine SQL to use the name, which is now on your table, and then restart the data conversion.

See Appendix: "Using the Comparison Process."

Restarting Data Conversion

Before restarting a data conversion step, rename the log file. 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.

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 Change Assistant job, it will rerun the program using the PROCESS_INSTANCE and RUN_CNTL_ID from the initial run and the conversion will restart right after the last committed SQL command. Application Engine keeps track of data committed to the database in the table PS_AERUNCONTROL, keyed by PROCESS_INSTANCE and RUN_CNTL_ID.

See Finalizing the Database Structure.

Properties

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

Task 4-12-2: Running Data Conversion for Group 1

This step runs the UPG_DATACONV Application Engine program for Group 1. For additional documentation for Group 1, run the UDATACNV report.

Group 1 must execute successfully before any other groups (if applicable) can run. If there are other groups and you decide to run groups concurrently, Group 1 must complete before you launch any other groups.

Properties

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

Task 4-12-3: Running Data Conversion for Group 2

This step runs the UPG_DATACONV Application Engine program for Group 2.

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Properties

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

Task 4-12-4: Running Data Conversion for Group 3

This step runs the UPG_DATACONV Application Engine program for Group 3.

Properties

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

Task 4-12-5: Running Data Conversion for Group 4

This step runs the UPG_DATACONV Application Engine program for Group 4.

Properties

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

Task 4-12-6: Running Data Conversion for Group 5

This step runs the UPG_DATACONV Application Engine program for Group 5.

Properties

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

Task 4-12-7: Running Data Conversion for Group 6

This step runs the UPG_DATACONV Application Engine program for Group 6.

Properties

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

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Task 4-13: Backing Up After Data Conversion

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

Properties

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

Task 4-14: Finalizing the Database Structure

This section discusses:

- Understanding 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 Final Database Structure

Now that Data Conversion is completed, this task will alter the tables to remove obsolete columns, and create final indexes and views.

Task 4-14-1: Building the Alter with Deletes Scripts

This step uses the previously created project ALLTABS and generates three SQL scripts: one that will alter tables to drop obsolete columns, one that will also create any remaining indexes that could not be created with the first alter, and one that will create triggers. The script names are:

```
ALLTABS_DEL_ALTTBL.SQL
ALLTABS_DEL_CRTIDX.SQL
ALLTABS_DEL_CRTTRG.SQL
```

Important! All indexes should create when the ALLTABS_DEL_CRTIDX.SQL script is run. When a unique index fails to create, it is probably due to a data conversion issue. If a unique index fails to create, 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 you need to correct it.

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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 4-14-2: Altering Tables with Deletes

This step executes the script, ALLTABS_DEL_ALTTBL.SQL, which was generated in the previous step.

Properties

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

Task 4-14-3: Creating Indexes Again

This step executes the script ALLTABS_DEL_CRTIDX.SQL, which was generated in the previous step. All indexes should create at this time.

Important! Review the log to find any unique indexes that might have failed to create. All indexes should create at this time, so those errors are not acceptable and should be corrected. When a unique index fails to create, it is probably due to a data conversion issue.

Properties

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

Task 4-14-4: Creating Triggers

This step executes the script ALLTABS_DEL_CRTTRG.SQL, which was generated in a previous step.

Properties

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

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Task 4-14-5: Running the AE SYNCIDGEN Process

This step executes the AE_SYNCIDGEN Application Engine program. Mobile applications use Sync 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 4-14-6: Creating All Views

This step runs CREATEVW.DMS to re-create all views in the Copy of Production database. The script will try to create every view in Application Designer. If there is an error on one view, it will keep going until it gets to the end of the list.

Important! Review the log to find any views that failed to create. All views should create 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 4-15: Preparing for Mass Compile of Metadata

This section discusses:

- Understanding Mass Compile of Metadata
- Loading System Data into Upgrade Table
- Reviewing New System Metadata
- Reviewing Changed System Metadata
- Reviewing Customized System Metadata
- Deleting System Metadata
- Removing Duplicate Data
- Cleaning Metadata and Search Table Data

Understanding Mass Compile of Metadata

In this task, you prepare for the mass compile of metadata by performing the following steps:

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1. Load system data into upgrade table
2. Review new system metadata
3. Review customized system metadata
4. Delete system metadata
5. Clean metadata and search table

The system metadata reviews are needed because any customizations you made to the system metadata will be deleted when the system metadata is deleted in the final step in this task. You will need to reapply your system metadata customizations after you complete the upgrade.

The system metadata is reloaded in the step titled "Import Application System Data" in the "Loading Data to Complete System Setup" task.

Task 4-15-1: Loading System Data into Upgrade Table

This Data Mover script loads the following system data into the PF_MD_UPGRADE table:

- Record metadata
- TableMaps
- DataMaps
- Expressions
- Constraints
- Filters
- DataSets
- Jobstreams
- Jobs
- Engines
- Reports
- Rules

The script name for your upgrade path is:

```
UVPFN02.DMS
```

Properties

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

Task 4-15-2: Reviewing New System Metadata

This script reports system metadata that is new in this release and was not present in your previous PeopleSoft release. The results from this script are for your information only; no further action is needed.

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```
PS_HOME\SCRIPTS\UVPFX02.SQL
```

Properties

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

Task 4-15-3: Reviewing Changed System Metadata

This script reports system metadata that were previously delivered but have been changed by the user. The results from this script are for your information only; no further action is needed.

```
PS_HOME\SCRIPTS\UVPFX03.SQL
```

Properties

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

Task 4-15-4: Reviewing Customized System Metadata

This script reports system metadata that is new in this release and is customized on your database. If you customized system metadata, you will lose your changes during the upgrade. You will need to reapply your customizations after you complete the upgrade. Save the script results, as you will need them to reapply customizations to system metadata later in the upgrade process.

```
PS_HOME\SCRIPTS\UVPFX04.SQL
```

Properties

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

Task 4-15-5: Deleting System Metadata

This Application Engine program, PF_MD_UPGRAD, deletes system metadata from the data tables controlling Enterprise Warehouse metadata. System metadata will be reloaded in the step titled “Import Application System Data” in the “Loading Data to Complete System Setup” task.

Properties

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

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Task 4-15-6: Removing Duplicate Data

This script deletes any data necessary to avoid duplicates when the system metadata is reloaded later in the upgrade. The script name for your upgrade path is:

```
UVPFX04.DMS
```

Properties

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

Task 4-15-7: Cleaning Metadata and Search Table Data

This Data Mover script deletes all orphaned metadata and search table data. This script also deletes old Vantive constraints and filters. The script name for your upgrade path is:

```
UVPFX05.DMS
```

Properties

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

Task 4-16: Loading Data to Complete System Setup

This section discusses:

- Exporting Strings
- Importing Strings
- Exporting EDI Statements
- Importing EDI Statements
- Exporting Mass Change Data
- Importing Mass Change Data
- Exporting XML Service Information
- Importing XML Service Information
- Exporting Related Language System Data
- Importing Related Language System Data
- Exporting Application System Data
- Importing Application System Data

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- Exporting Dimension Metadata System Data
- Importing Dimension Metadata System Data
- Exporting Common Portal System Options
- Importing Common Portal System Options
- Exporting Setup Data
- Importing Setup Data

Task 4-16-1: Exporting Strings

This script exports Strings data from the Demo database. The script name for your upgrade path is:

```
DLUPX04E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 4-16-2: 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 4-16-3: Exporting EDI Statements

This script exports EDI Statements from the Demo database. The script name for your upgrade path is:

```
DLUPX05E.DMS
```

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

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Properties

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

Task 4-16-4: Importing EDI Statements

This script imports the EDI Statements into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX05I.DMS
```

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

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

Task 4-16-5: Exporting Mass Change Data

This script exports Mass Change tables from the Demo database. The script name for your upgrade path is:

```
DLUPX06E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 4-16-6: Importing Mass Change Data

This script imports Mass Change tables into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX06I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

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Properties

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

Task 4-16-7: Exporting XML Service Information

This script exports XML service data from the Demo database. The script name for your upgrade path is:

```
DLUPX13E.DMS
```

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

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

Task 4-16-8: Importing XML Service Information

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

```
DLUPX13I.DMS
```

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

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

Task 4-16-9: Exporting Related Language System Data

This script exports system data from various application-related language tables in your Demo database into a Data Mover *.DAT file. In a later step, this data will be loaded into your Copy of Production. The script name for your upgrade path is:

```
DLPFLASYSE.DMS
```

Note. During Move to Production passes you can reuse the data files that are created by this export script. Preserve this DAT file, and set the 'Type of Upgrade' property in the Change Assistant template to Initial Upgrade for this step.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	Any installed in addition to English

Task 4-16-10: Importing Related Language System Data

This script will delete old related language system data from related language tables. The script then imports the data exported by the scripts above. The script name for your upgrade path is:

```
DLPFLASYSI.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	Any installed in addition to English

Task 4-16-11: Exporting Application System Data

This script exports system data from various application tables from the Demo database into a 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:

```
DLPFSYSE.DMS
```

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, change the Type of Upgrade from Both to Initial Upgrade in the step properties and save the job.

Properties

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

Task 4-16-12: Importing Application System Data

This script imports the application system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

```
DLPFSYSI.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.

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Properties

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

Task 4-16-13: Exporting Dimension Metadata System Data

This script exports system data from dimension metadata tables from the Demo database into a 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:

```
DLPFX01E.DMS
```

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve the .DAT file and set the "Type of Upgrade" property in the Change Assistant template to Initial Upgrade for this step.

Properties

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

Task 4-16-14: Importing Dimension Metadata System Data

This script imports the dimension metadata system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

```
DLPFX01I.DMS
```

Note. Some of the data will be imported using the "ignore dupes" option. These data loads will give the message "Error: duplicate SQL rows" and then give a "Successful completion" message. These error messages can be ignored because duplicate data is expected.

Properties

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

Task 4-16-15: Exporting Common Portal System Options

This script exports the contents of the Common Portal System Options table from the Demo database. The script name for your upgrade path is:

```
DLEOX01E.DMS
```

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Properties

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

Task 4-16-16: Importing Common Portal System Options

This script imports the Common Portal System Options data into your Copy of Production database. The script name for your upgrade path is:

```
DLEOX01I.DMS
```

Properties

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

Task 4-16-17: Exporting Setup Data

This script exports setup data from the Demo database. The script name for your upgrade path is:

```
DLUPX16E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 4-16-18: Importing Setup Data

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

```
DLUPX16I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

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

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Task 4-17: Loading Personalizations

This section discusses:

- Exporting Personalizations
- Importing Personalizations

This task loads Enterprise Performance Management personalizations system data into the Copy of Production database.

Task 4-17-1: Exporting Personalizations

This step exports personalizations from the Demo database. The script name is:

```
DLPFX10E.DMS
```

Properties

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

Task 4-17-2: Importing Personalizations

This step imports personalizations into the Copy of Production database. The script name is:

```
DLPFX10I.DMS
```

Properties

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

Task 4-18: Completing Application Conversion

This section discusses:

- Updating Driver IDs

Task 4-18-1: Updating Driver IDs

Run the following script to update BP_DRIVER_ID values:

```
DLBGN01.DMS
```

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This script replaces the previously delivered BP_DRIVER_ID values with new BP_DRIVER_ID values.

Properties

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

Task 4-19: Updating Language Data

This section discusses:

- Understanding Updating Language Data
- Run the TSRECPOP Script

Understanding Updating Language Data

In this task, you run scripts to modify data in PeopleTools related language tables.

Note. For DB2 z/OS customers, PeopleSoft recommends that you run `RUNSTATS` against the system catalog tables at this time.

Task 4-19-1: Run the TSRECPOP Script

In this step, the TSRECPOP script initializes and modifies the data in PeopleTools related language architecture tables.

Properties

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

Task 4-20: Completing PeopleTools Conversion

The PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional 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.

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Properties

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

Task 4-21: 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 4-22: Running the Final Audit Reports

This section discusses:

- Run the Final DDDAUDIT Report
- Run the Final SYSAUDIT Report
- Create the FNLALTAUD Project
- Run the Final Alter Audit
- Review the Final Audits
- Run a Final SETINDEX Report
- Run a Final SETTABLE Report

Task 4-22-1: Run the Final DDDAUDIT Report

DDDAUDIT is an SQR that compares your production SQL data tables with the PeopleTools record definitions to uncover inconsistencies. You can expect some errors from this report. You will review the output from the report in another step.

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Properties

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

Task 4-22-2: Run the Final SYSAUDIT Report

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

Properties

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

Task 4-22-3: Create the FNLALTAUD Project

In this step, you create the FNLALTAUD project and use it to run your final Alter Audit. Creating this new project now ensures that all the records in your system are audited, including SQL tables and temp tables. This project also includes any custom records that you have created in your system.

Properties

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

Task 4-22-4: Run the Final Alter Audit

Run the PeopleTools alter record process on all tables in your system to check whether the PeopleTools definitions are synchronized with the underlying SQL data tables in your database. PeopleSoft calls this process an Alter Audit. Alter Audit compares the data structures of your database tables with the PeopleTools definitions to uncover inconsistencies. Alter Audit then creates an SQL script with the DDL changes needed to synchronize your database with the PeopleTools definitions.

The Alter Audit script is built using the FNLALTAUD project created in the previous step.

Properties

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

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Task 4-22-5: Review the Final Audits

The Alter Audit process creates SQL scripts that correct any discrepancies between your PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies noted by running the generated scripts with your platform-specific SQL tool. The script names are:

```
FNLALTAUD_ALTTBL.SQL
FNLALTAUD_CRTIDX.SQL
```

Note. The Alter Audit process also creates the script `FNLALTAUD_CRTTRG.SQL`, which re-creates all database triggers. You do not need to run this script, since all database triggers were created in a previous task.

See Finalizing the Database Structure.

Note. For Informix sites, if your database has Application Functions, you use SQL to drop and re-create these functions and their associated indexes, even though the underlying tables and indexes have not changed.

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

Review the output from the SYSAUDIT and DDDAUDIT reports and correct any discrepancies.

Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from the Application Designer are not automatically deleted from the system tables. PeopleSoft takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Your SYSAUDIT report may have some errors due to references to obsolete PeopleSoft-owned objects. For instance, if PeopleSoft deletes a Permission List, and you have a Role that still refers to that Permission, then it will appear on the SYSAUDIT report.

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

Properties

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

Task 4-22-6: Run a 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.

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Properties

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

Task 4-22-7: Run a Final SETTABLE Report

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

Properties

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

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CHAPTER 5

Complete Database Changes

This chapter discusses:

- Understanding Database Changes
- Configuring the Upgrade Environment
- Reapplying Customizations
- Setting Up Security
- Completing Portal Data Conversion
- Reviewing PeopleTools Functionality
- Defining Source System IDs
- Refreshing User Defined Ledger Template
- Reviewing Application Message Settings
- Upgrading Project Request Milestones
- Activating Security Groups
- Upgrading Consolidation Processes
- Upgrading Workforce Analytics
- Synchronizing Metadata
- Upgrading Legacy Business Unit Mappings
- Upgrading GC Journal Publish Mapper Rules
- Fixing Scorecard User Security
- Fixing Scorecard User Defaults
- Fixing KPI Assessment Images
- Updating KPI Descriptions
- Installing the EPM Charting Tool
- Preparing the Content Provider Registry
- Updating the Portal Options Data
- Stamping the Database
- Reviewing Change Control
- Backing Up Before Testing
- Testing Your Copy of Production

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Understanding Database Changes

Many changes were made in the previous chapters of this documentation. In this chapter, you complete these changes so 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 5-1: Configuring the Upgrade Environment

This section discusses:

- Configure Application Server
- Configure Portal

Task 5-1-1: Configure Application Server

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

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

Tips for configuring and starting the application server:

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

See the Enterprise PeopleTools installation guide for your database platform.

Properties

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

Task 5-1-2: Configure Portal

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

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

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

To assign a password:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.

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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 Info page, select *Password* as the Authentication Option.
5. Enter a password in the Password field.
6. Enter the password again in the Confirm Password field.
7. Save the Node Definition.
8. 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 5-2: Reapplying Customizations

This section discusses:

- Understanding the Reapplication
- Performing Customized Object Adjustment
- Registering Portal Navigation Objects

Understanding the Reapplication

In this task, you work with your customized objects to ensure that they are properly integrated into your upgraded database.

Task 5-2-1: 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 PeopleSoft version of an object instead of your own customized version, you may need to customize the new objects to get the blend of new standard features and your custom features. In complex cases, this may take several iterations. You need to make manual adjustments to the objects to apply these customizations.

Reapply any Mass Change or EDI customizations.

See "Prepare Your Database," Identifying Customizations.

Be aware that you must not overwrite PeopleSoft-loaded data. The customizations, extracted during an earlier step, must be manually applied now.

In another step, you reviewed some customizations that would be removed by the upgrade.

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See “Run and Review Compare Reports,” Reviewing the UPGSYNCALL Compare Reports.

If you have customizations that need to be reapplied, manually reapply them now.

In another step, you applied the PeopleSoft-delivered record group assignments.

See “Apply Application Changes,” Loading Data for Data Conversion, Importing Record Groups.

If you maintain any custom record group assignments, reapply them to your Copy of Production database now.

During Move to Production passes, you will not need to reapply these customizations. The changes you make now will be copied to any subsequent Copy of Production database using Data Mover scripts.

Properties

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

Task 5-2-2: Registering Portal Navigation Objects

You must register your customized objects, such as menus and components, in order to access them in Portal. You can use the Registration Wizard or the Menu Import process to grant access to the appropriate components. Make sure you register your components for all of your portals (for example, Customer, Supplier, Employee, and so forth). Also, make sure that you select the node name that matches the database. Do not use the Local node.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer for your new release, “Using the Registration Wizard.”

See the Enterprise PeopleTools PeopleBook: Internet Technology for your new release, “Administering Portals.”

Properties

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

Task 5-3: Setting Up Security

This section discusses:

- Understanding Security
- Set Up Security
- Synchronize CREF Permissions
- Grant Access to Personalize Homepage

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Understanding Security

In this task you perform steps to set up security, grant access to the user ID, set up permissions lists, and grant access to navigation and homepages.

Task 5-3-1: Set Up Security

This section discusses:

- Understanding Security Setup

Understanding Security Setup

Select the PeopleTools, Security folder now to add the new 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 select a specific menu within the new PeopleSoft release. To perform these tasks, set up appropriate security for each of the menus referenced in each of the tasks.

See the PeopleSoft Enterprise Portal Solutions PeopleBook: Enterprise Portal Application Technology 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 PeopleTools, you must manually apply the changes to your Copy of Production database before the end of the final Move to Production.

Properties

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

Task 5-3-2: Synchronize CREF Permissions

This section discusses:

- Understanding Content Reference Permissions
- Running the Portal Security Synchronization Process

Understanding Content Reference Permissions

As part of the PeopleTools 8.4x Portal architecture, Portal Registry Structures reference permission lists. At this point, however, the Portal Registry Structures copied from the Demo database do not reference any permission lists on the Copy of Production database. This synchronization program will match the existing permission lists to the appropriate Registry Structures and update it.

Note. The user ID that invokes this process must have the security role Portal Administrator. Otherwise, the process may terminate abnormally.

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Note. Your Process Scheduler must be running in order to perform this task.

Running the Portal Security Synchronization Process

Follow the steps below to run the Portal security synchronization process.

To run the security synchronization process:

1. From your browser, sign on to your Target database.
2. Select PeopleTools, Portal, Portal Security Sync.
3. Select Add a New Value.
4. Enter the run control ID *UPG_PORTAL_SYNC_BOTH*.
5. Click Add.
6. Keep the default value for the default portal registry name in the Portal Name field (for example: *EMPLOYEE*, *CUSTOMER*, or *SUPPLIER*).
7. Click Save.
8. Click Run.
9. In the Process Scheduler page, check that you set your parameters correctly.
10. Click OK.
11. Click the Process Monitor link to monitor the program's process.
12. Repeat steps 6 through 11 for each Portal name used in the database for your specific applications. With each repeat, in step 6 change the Portal Name field to one of the following: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, *MOBILE*, and so on.
13. Review any messages received during the running of this process with your Portal Administrator.

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

Note. If the permission lists for your upgrade user do not allow you access to a component, you will encounter this error when running the security synchronization process for that page: `Security synchronization failed for Portal Object.` This error may indicate other problems with the component or folder, but you should check your security first.

Properties

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

Task 5-3-3: Grant Access to Personalize Homepage

This section discusses:

- Understanding Access to Portal Homepage
- Updating Homepage Personalization Permission List
- Adding the Portal User Role

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Understanding Access to Portal Homepage

You must complete this step if you use any of the 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 Homepage Personalization Permission List

To update the homepage personalization permission list:

1. Using PeopleSoft Data Mover, sign on to the Target database.
2. Open the Data Mover script *PS_HOME*\SCRIPTS\PORTAL_HP_PERS.DMS.
3. Run this script against the Target database.
4. Close 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_HOME*\SCRIPTS\PORTAL_ADD_ROLE.DMS.
3. Run this script against the Target database.
4. Close 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	Initial	All	All	All

Task 5-4: Completing Portal Data Conversion

This section discusses:

- Reviewing Pagelet and Collection Log
- Enabling Pagelet Publishing

Task 5-4-1: Reviewing Pagelet and Collection Log

This section discusses:

- Correct Logged Issues
- Run UPGPT846PP Again

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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.

Correct Logged Issues

Review the log from running the data conversion UPGPT846PP Application Engine program in the task titled, "Completing 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 2 task “Converting PeopleTools Objects” in the “Report Conversion Details” step.

Run 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 5-4-2: 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 5-5: Reviewing PeopleTools Functionality

The PeopleSoft Enterprise PeopleBooks detail the current PeopleTools functionality. There are many new features delivered in the new release that you may wish to use. You should now review the PeopleSoft Enterprise PeopleBooks and PeopleTools Installation Guide to configure your environment properly. This may include, but is not limited to, configuring and starting a process scheduler, report server, and reviewing portal settings.

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

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

- If you applied a 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 Change Assistant output directory if you do not know whether a script was already run during the upgrade process.
- PeopleTools has updated the styles that define the look of the user interface. The classic (old) style sheet, as well as two new styles, are delivered with this release of PeopleTools. PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. After the PeopleTools portion of the upgrade, PeopleSoft sets the classic style as the default, but you can update to one of the new user interface styles.

  See Appendix: “Changing the User Interface.”

  Note. The new user interface styles are supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If you are using any other browser or release, the system uses the classic style as the default.

- PeopleTools uses Verity release 5.0 to implement free text search. Verity 5.0 is not compatible with the version of Verity that was used in previous PeopleTools releases. Check the necessary application patches that may be required in order to use the new version of Verity.

  See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).
- Integration Broker was rewritten in PeopleTools 8.48. If you use Integration Broker, you will need to perform setup configuration and review the explanation of metadata mapping.

  See Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker.

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Properties

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

Task 5-6: Defining Source System IDs

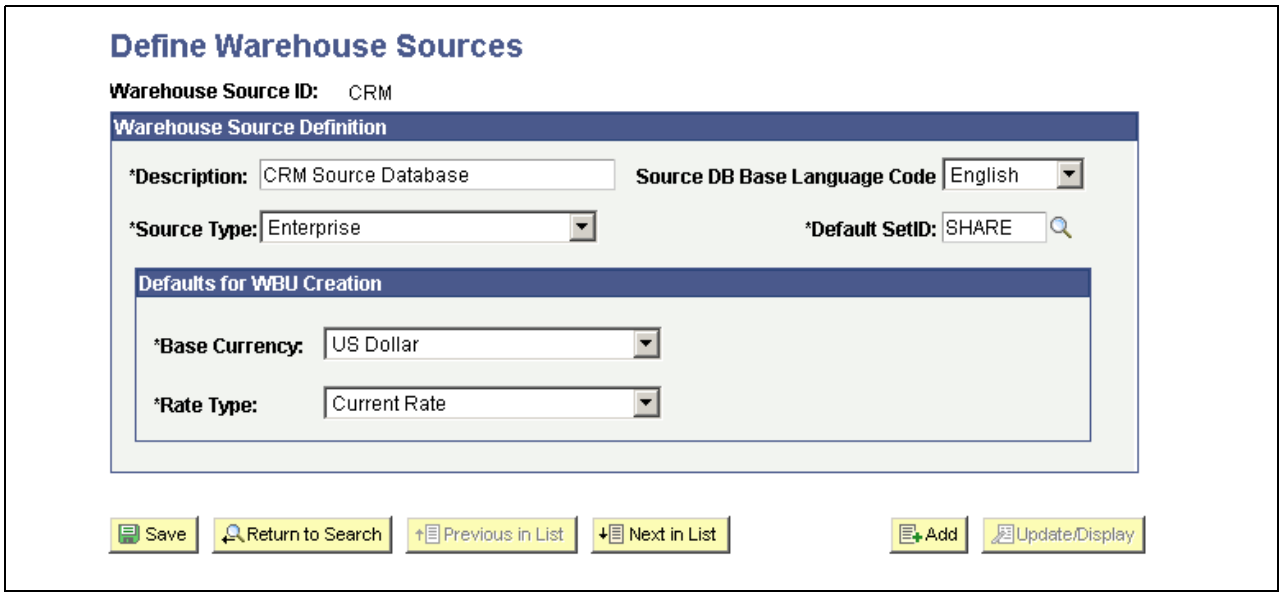
In the new release, Enterprise Warehouse tags its data with the ID of the source transaction database. This tag is called source system ID. For each source system ID that you have identified previously in the upgrade, you will define its complete definition in this task.

See “Prepare Your Database,” Defining Defaults for the OWE Upgrade.

To define source system IDs:

1. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Define Warehouse Sources.
2. Select the Add Warehouse Source tab to add a new source system ID.
3. Set the Warehouse Source ID to your source system ID.

   The Define Warehouse Source dialog box appears.



Define Warehouse Source dialog box

4. Set the description to the source system ID’s description.
5. Set the source type to Enterprise if the source database is another EPM database. Set it to EnterpriseOne if the source database is an EnterpriseOne database. Lastly, set it to Other if the source database is an Enterprise transaction database or a non-PeopleSoft application database.
6. Set the source base language code, default SetID, base currency, and rate type to those of the source database.

   More information on setting up and defining these parameters can be found in the EPM PeopleBooks.

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

7. Save the source system ID definition.
8. If you have more source system IDs to define, select the Add button and repeat steps 3 through 7.

See the PeopleSoft Enterprise Performance Management Warehouse PeopleBook for your new release.

Properties

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

Task 5-7: Refreshing User Defined Ledger Template

Many delivered ledger records have changes in ChartFields. For user-defined ledger templates—that is, ledger templates that were not delivered by Peoplesoft and were created based on these ledger records—you must manually refresh the ChartFields.

To refresh ChartFields for user-defined ledger templates:

1. Select EPM Foundation, EPM Setup, Ledger Setup, Ledgers, Ledger Template.
2. Click Search.
3. Select a ledger template that fits the criteria described above.
4. On the ChartFields page, write down or take a screen shot of the existing settings.
5. Then, click the refresh button in the right corner.

   The page will be populated with the ChartFields according to the new record definition.
6. You can make changes to the edit fields if necessary.
7. Save your changes when you are finished.

Properties

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

Task 5-8: Reviewing Application Message Settings

The upgrade may have inactivated some of your application messages. You will need to reactivate any that may have been in use. You can refer to the compare results from the task titled, “Running New Release Compare Reports,” to determine which messages should be reactivated.

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To activate an application message:

1. Open Application Designer for your Copy of Production database.
2. Open the message you want to activate.
3. Access the message properties (either choose File, Definition Properties or click the Properties icon on the task bar).
4. Click the Use tab.
5. Select the Active option.
6. Click OK.
7. Save the message.

Properties

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

Task 5-9: Upgrading Project Request Milestones

This task only applies to Project Portfolio Management 8.81 and above. If you are using Project Portfolio Management 8.80, skip this task.

With the new design of project request milestones in the current release of Project Portfolio Management, any existing project request milestones in EPM 8.8x need to be entered manually. Refer to the following sections for details about how to add a milestone to a project request.

See the PeopleSoft Enterprise Project Portfolio Management PeopleBook for your new release, “Establishing Project Requests,” Assigning Milestones.

See the PeopleSoft Enterprise Project Portfolio Management PeopleBook for your new release, “Setting Up Project Portfolio Management,” Understanding Milestones.

See the PeopleSoft Enterprise Project Portfolio Management PeopleBook for your new release, “Setting Up Project Portfolio Management,” Defining Milestones.

Properties

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

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Task 5-10: Activating Security Groups

For the Planning and Budgeting application, the security setup associated with the Planning Model/Phase in earlier releases has been upgraded to a security group in the current release. The upgraded security groups have been initially set to an inactive status.

To activate security groups:

1. Select Planning and Budgeting, System Administration, Administer User Security, Security Groups.
2. Review and set the required security groups to an active status.

More information on security groups is available in a PeopleBook.

See the PeopleSoft Enterprise Planning and Budgeting PeopleBook for your new release, "Setting Up Security and Roles."

Properties

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

Task 5-11: Upgrading Consolidation Processes

In the new PeopleSoft release, there are changes to the content of the process definition table for Global Consolidations (GC):

- The process ID, CLOSED, has been renamed to LOCKED. If the process CLOSED is being used in your consolidation process, you may need to modify the information for that process. The following table displays information for the old and new processes.

Process ID	Display Order	Description	Function	Consolidation Phase
CLOSED	100	Period closed	Consolidation closed	Consolidation
LOCKED	100	Locked period	Consolidation locked	Consolidation

- The following table lists six new processes added in the demo database environment:

Process ID	Display Order	Description	Function	Consolidation Phase
LEDVERFY	15	Source ledger verification	Source ledger verification	Ledger Preparation
HARMONIZE	46	Harmonization entries	Manual	Ledger Enrichment
FXADJ	50	Translation adjustments	Translation adjustments	Ledger Enrichment

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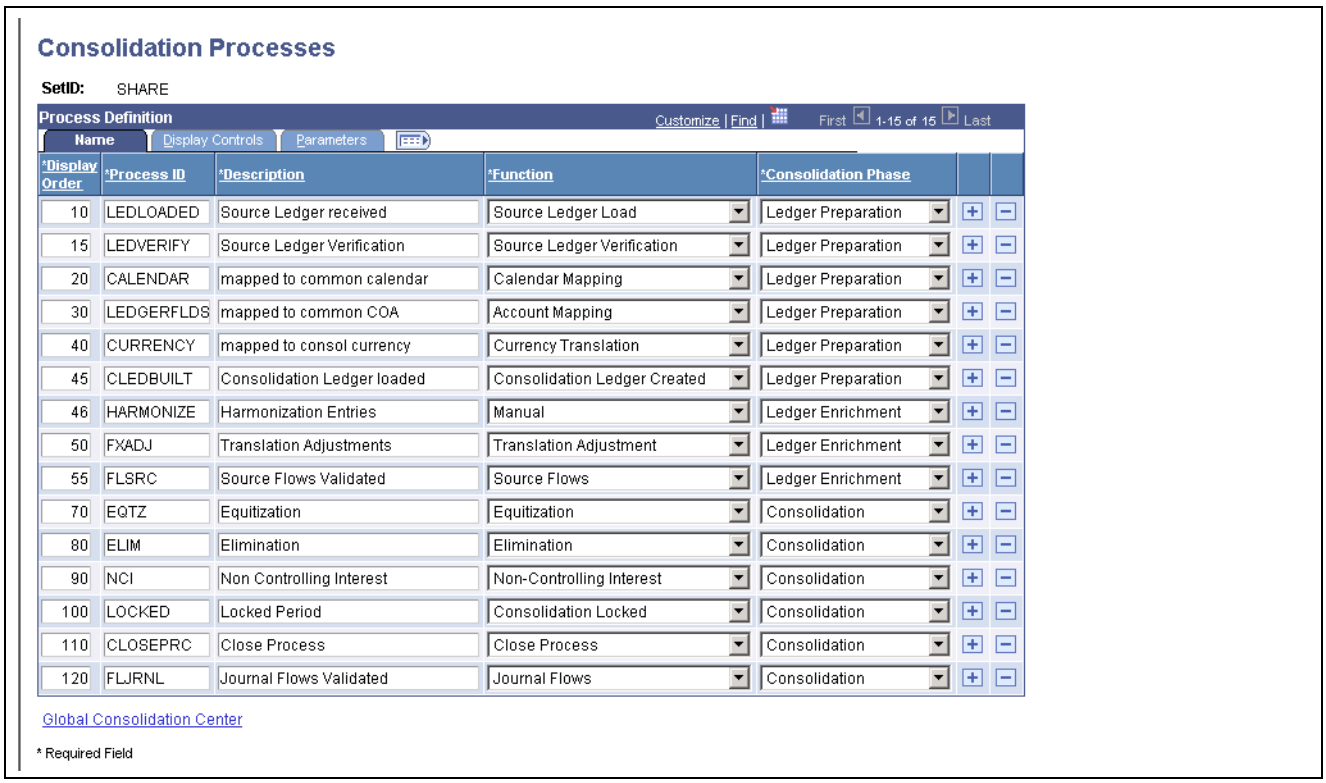
Process ID	Display Order	Description	Function	Consolidation Phase
FLSRC	55	Source flows validated	Source flows	Ledger Enrichment
CLOSEPRC	110	Close process	Close process	Consolidation
FLJRNL	120	Journal flows validated	Journal flows	Consolidation

If you find any of these processes are critical in your consolidation process, you must manually add them into the system. In addition, if any of these processes conflict with your existing definition in terms of display order or process ID, please make the changes necessary. Finally, if you entered your definitions in a non-base language, please make sure these new changes are also entered in the non-base language.

Use the following three figures to assist you in determining the relevance of these new processes in your consolidation process. The figures illustrate these six new processes in the context of all the consolidation processes delivered in the demo database:



Consolidation Processes

SetID: SHARE

Process Definition — Customize | Find | First 1-15 of 15 Last

Name | Display Controls | Parameters

*Display Order	*Process ID	*Description	*Function	*Consolidation Phase
10	LEDLOADED	Source Ledger received	Source Ledger Load	Ledger Preparation
15	LEDVERIFY	Source Ledger Verification	Source Ledger Verification	Ledger Preparation
20	CALENDAR	mapped to common calendar	Calendar Mapping	Ledger Preparation
30	LEDGERFLDS	mapped to common COA	Account Mapping	Ledger Preparation
40	CURRENCY	mapped to consol currency	Currency Translation	Ledger Preparation
45	CLEDBUILT	Consolidation Ledger loaded	Consolidation Ledger Created	Ledger Preparation
46	HARMONIZE	Harmonization Entries	Manual	Ledger Enrichment
50	FXADJ	Translation Adjustments	Translation Adjustment	Ledger Enrichment
55	FLSRC	Source Flows Validated	Source Flows	Ledger Enrichment
70	EQTZ	Equitization	Equitization	Consolidation
80	ELIM	Elimination	Elimination	Consolidation
90	NCI	Non Controlling Interest	Non-Controlling Interest	Consolidation
100	LOCKED	Locked Period	Consolidation Locked	Consolidation
110	CLOSEPRC	Close Process	Close Process	Consolidation
120	FLJRNL	Journal Flows Validated	Journal Flows	Consolidation

Global Consolidation Center

* Required Field

Consolidation Processes page: Name tab

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Consolidation Processes

SetID: SHARE

Process Definition — Customize | Find | First 1-15 of 15 Last

Name | Display Controls | Parameters

*Display Order	*Process ID	Display On	*Display Title
10	LEDLOADED	Ledger Preparation Manager	Data Received
15	LEDVERIFY	Ledger Preparation Manager	Source Verification
20	CALENDAR	Ledger Preparation Manager	Calendar Mapping
30	LEDGERFLDS	Ledger Preparation Manager	Account Mapping
40	CURRENCY	Ledger Preparation Manager	Currency Translation
45	CLEDBUILT	Ledger Preparation Manager	Ledger Loaded
46	HARMONIZE	Ledger Preparation Manager	Harmonization Entries
50	FXADJ	Ledger Preparation Manager	Translation Adjustment
55	FLSRC	Ledger Preparation Manager	Source Flows
70	EQTZ	Consolidation Manager	Equitization
80	ELIM	Consolidation Manager	Elimination
90	NCI	Consolidation Manager	Non-Controlling
100	LOCKED	Consolidation Manager	Period Locked
110	CLOSEPRC	Consolidation Manager	Close Process
120	FLJRNL	Consolidation Manager	Journal Flows

Global Consolidation Center

* Required Field

Consolidation Processes page: Display Controls tab

Consolidation Processes

SetID: SHARE

Process Definition — Customize | Find | First 1-15 of 15 Last

Name | Display Controls | Parameters

*Display Order	*Process ID	*Status Update Method	Process Order	Process Name	Reconciliation Job ID
10	LEDLOADED	None	10		
15	LEDVERIFY	Application Engine Batch	15	GC_LEDVERIFY	
20	CALENDAR	Application Engine Batch	20	GC_PREP	GCRECNCAL
30	LEDGERFLDS	Application Engine Batch	30	GC_PREP_MAP	GCRECNCLE
40	CURRENCY	Application Engine Batch	40	GC_PREP_CURR	GCRECNCUR
45	CLEDBUILT	Application Engine Batch	50	GC_PREP_CLED	
46	HARMONIZE	Manual Processing	44		
50	FXADJ	Application Engine Batch	55	GC_FX_MGR	
55	FLSRC	Application Engine Batch	42	GC_FLSRC_ENG	
70	EQTZ	Application Engine Batch	60	GC_EQTZ_MGR	GCRECNEQT
80	ELIM	Application Engine Batch	60	GC_ICUELIMS	GCRECNELIM
90	NCI	Application Engine Batch	60	GC_NCI_ELIM	GCRECNNCI
100	LOCKED	Locking Processing	100		
110	CLOSEPRC	Application Engine Batch	110	GC_CLOSE_MGR	
120	FLJRNL	Application Engine Batch	120	GC_FLJRN_ENG	

Global Consolidation Center

* Required Field

Consolidation Processes page: Parameters tab

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Properties

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

Task 5-12: Upgrading Workforce Analytics

This section discusses:

- Reloading the Analytic Calculation Engine Model
- Integrating with Position Budgeting Data
- Populating the Employee Total Field

Task 5-12-1: Reloading the Analytic Calculation Engine Model

To analyze or alter the compensation planning scenario results in Workforce Analytics, the Analytic Calculation Engine (ACE) model needs to be reloaded even if a Business Analytic Modeler (BAM) model has been previously loaded.

To reload the ACE model, select Workforce Analytics, Compensation Strategy, Setup Compensation Scenario, Load Analytic Model.

Properties

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

Task 5-12-2: Integrating with Position Budgeting Data

If the Workforce Analytics compensation strategy approval process is run to export the compensation planning scenario results to the position budgeting application, then you will want to integrate Workforce Analytics data with position budgeting data.

To complete this integration:

1. Select Workforce Analytics, Compensation Strategy, Setup Compensation Scenario.
2. Select the Variable Rule page.
3. Select the earning code.
4. Select the Other Pay Rule page.
5. Select the benefit plan type.

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Properties

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

Task 5-12-3: Populating the Employee Total Field

A new field, Employee Total, has been added to the review market scenario Fit to Market page and Gap to Target page. To populate this new field, you will need to rerun the market compensation engine, WA_MBP.

To populate the Employee Total field, select Workforce Analytics, Market Compensation, Process, Run Market Scenario.

Properties

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

Task 5-13: Synchronizing Metadata

This section discusses:

- Synchronizing Record Suites for Non DB2
- Synchronizing Record Suites for DB2
- Running the Mass Compile
- Reloading Data Mapper Rule Set Columns
- Running Application Security Processing
- Exporting KPI Calculation Definitions
- Deleting Obsolete Objects
- Importing KPI Calculation Definitions
- Recompiling Application Rules
- Importing KPI Calculation Data
- Fixing KPI Calculation Definitions
- Running KPI Manager Rules Compile
- Running the Metadata Audit
- Reviewing the Metadata Audit Results

In this task, you will run the metadata mass compile and metadata audit, review the metadata audit results and error detail, and recompile application rules.

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Task 5-13-1: Synchronizing Record Suites for Non DB2

This Data Mover script synchronizes the Record Suites Metadata with your existing data. If you have additional Record Suites, this script populates the necessary table with that information. The script name for your upgrade path is:

```
UVPFX06.DMS
```

Note. This script is for non-DB2 database only.

Properties

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

Task 5-13-2: Synchronizing Record Suites for DB2

This Data Mover script synchronizes the Record Suites Metadata with your existing data. If you have additional Record Suites, this script populates the necessary table with that information. The script name for your upgrade path is:

```
UVPFX06DB2.DMS
```

Note. This script is for DB2 databases only.

Properties

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

Task 5-13-3: Running the Mass Compile

In this step you will run the mass compile.

To run the mass compile, first sign on to your target database from your browser:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes, Add New Run Control ID.
2. Enter a Run Control ID, and click Add.

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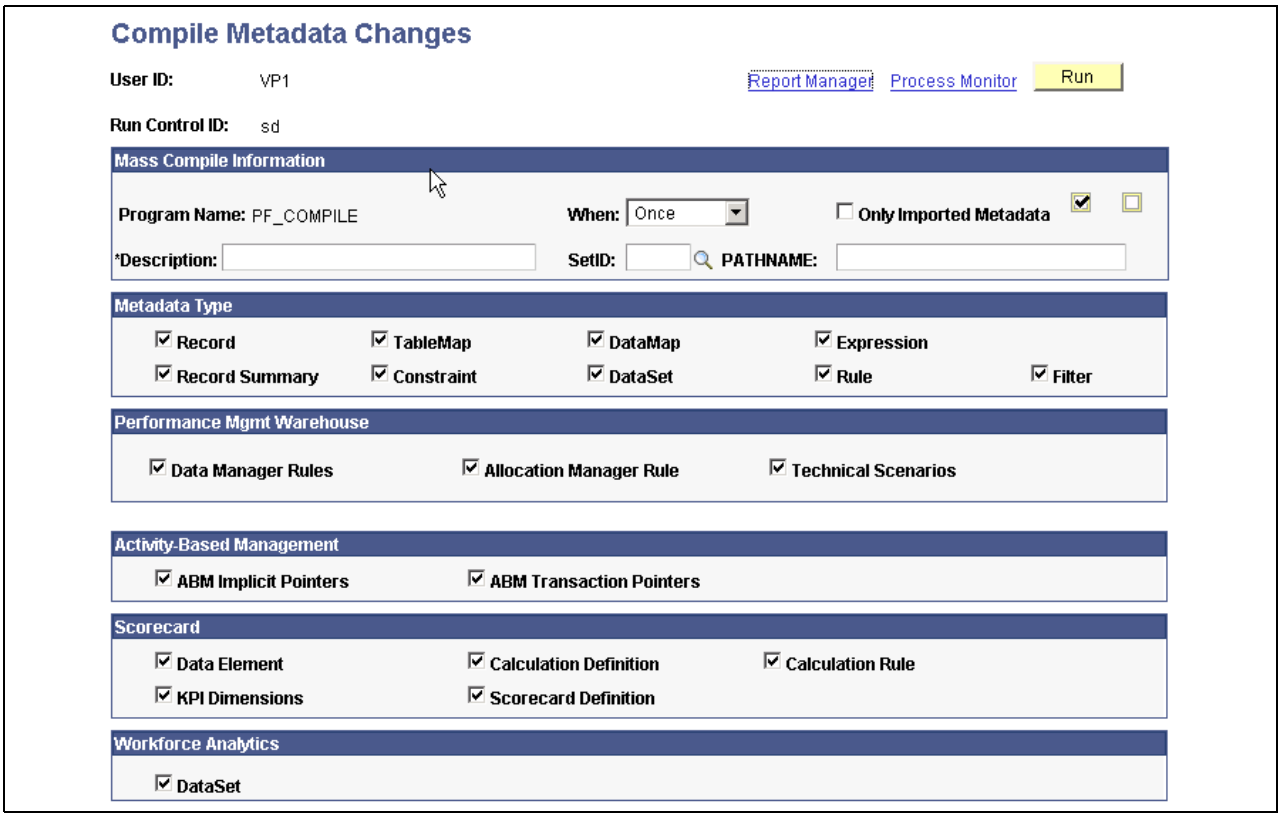

Compile Metadata Changes page

3. In the When field, select *ALWAYS*.
4. Enter a Description.
5. Select the Clear All option, the right-most check box in the upper right corner. (The page is currently shown with the Select All option selected.)

   This will clear all of the check boxes on the page.
6. In the Metadata Type group box, select all of the check boxes.
7. Click Save.
8. Click Run.
9. On the Process Scheduler Request page, select your process scheduler from the Server Name drop-down list.
10. Click OK to run the process (it will run for several hours).

    Use Process Monitor to check the success of the process (PF_COMPILE).

Important! If you get errors in the mass compile, you must fix them and rerun the mass compile before proceeding with the upgrade.

To resolve any errors in the Data Manager or Allocation Manager rules, please compile the underlying data maps and then compile the rules. Refer to your PeopleBooks for more information.

See PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up and Working with EPM Foundation Metadata,” Setting Up Datamaps.

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See Appendix: "Fixing Compilation Errors."

Properties

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

Task 5-13-4: Reloading Data Mapper Rule Set Columns

Many target data maps used by the data mapper rule sets have changes in field definitions. You will need to reload the grid that is used to populate rule set columns on the data mapper rule set page. This includes any data mapper rule set that uses the GCMLEDMGT delivered target data map or data maps that are based on the same record or subrecord.

To reload data mapper rule sets:

1. Select EPM Foundation, Data Enrichment Tools, Data Mapper, Rule Set.
2. Click Search.
3. Select a map rule set that fits the criteria described previously.
4. On the Data Mapper Rule Set page, first take a screen shot.
5. Click the Reload Definition button, which is located above the Rule Set Columns grid.

   The grid will be populated with the new field definitions.
6. You can now perform the field mapping.
7. Save the page.

Properties

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

Task 5-13-5: Running Application Security Processing

In this step you will run the application engine for security processing. The security rules that were upgraded during the Data Conversion step will be used to generate data for the security join tables.

Before running application security processing, you must create your customized dimension metadata and verify that the security rules are correctly migrated.

To complete application security processing:

1. Select EPM Foundation, Foundation Metadata, Metadata Creation and Editing, Define Dimension.
2. Now you have to create your custom object types.

   You identified these custom object types earlier in the upgrade during the step "Identify Custom Object Types."

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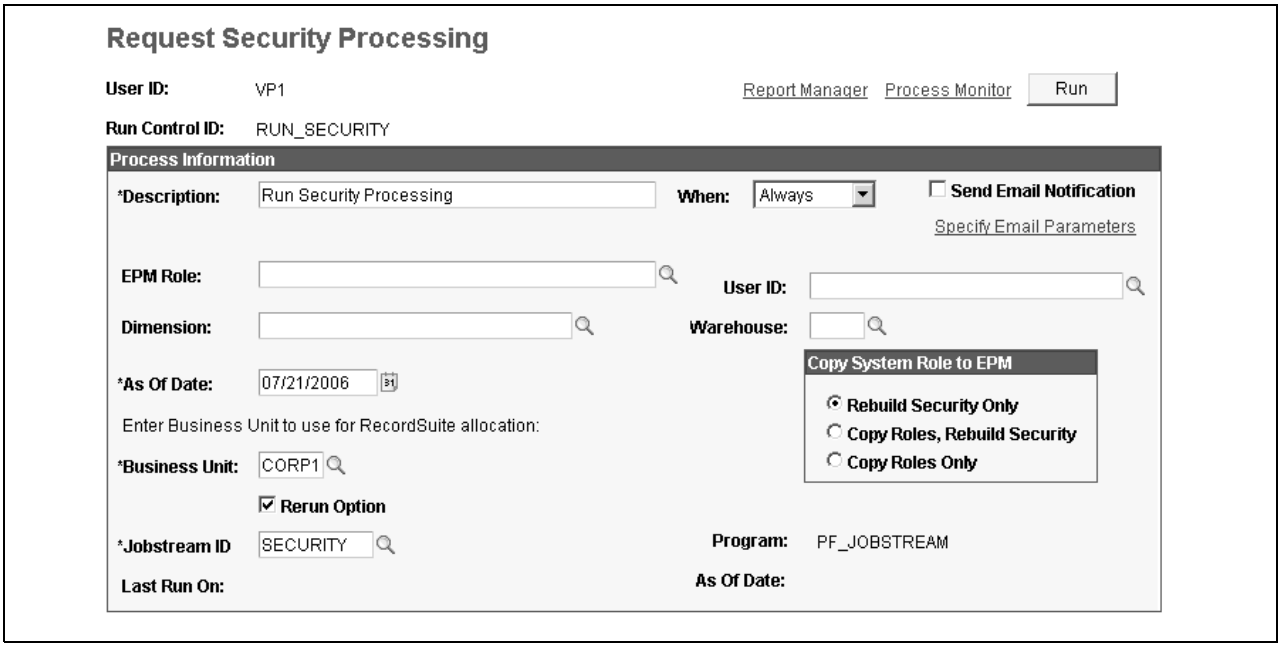
See PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook, “Setting Up and Working with EPM Foundation Metadata,” “Defining and Setting Up Dimensions.”

All your old customized object types need to be set up as OWE Dimensions.

3. Select EPM Foundation, EPM Security, Security By Role, Role Dimension Access.
4. Verify that all your security rules have been migrated correctly.

   Security rules are migrated by converting each security group to a security role in the new security setup.
5. If you have any constraint-based security rules, select “Constraint based selection” and reload the constraint; correct any errors you might encounter.

   See PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook, “Setting Up and Working with EPM Foundation Metadata,” “Securing EPM.”
6. Select EPM Foundation, EPM Security, Advanced, Request Security Processing, Add New Run Control ID.
7. Enter a Run Control ID, and click Add.



Request Security Processing page

8. In the When field, select *Always*.
9. Enter a description.
10. Enter the business unit to use for RecordSuite allocation.
11. Select the Rerun option.
12. In the Jobstream ID field, enter SECURITY.
13. Click Save.
14. Click Run.
15. On the Process Scheduler Request panel, click OK to run the process (it will run for a long time).
16. Use Process Monitor to check the success of the process (PF_JOBSTREAM).

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Properties

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

Task 5-13-6: Exporting KPI Calculation Definitions

In this step, you will export rows from the Key Performance Indicator (KPI) Calculation Definition and Calculation Fields tables. The first section of this Data Mover script exports all rows from KPI Calculation Definitions and Calculation Fields and creates data file UVBCX01_FULL.DAT. The second section exports only the earliest effective dated rows from the KPI Calculation Definition and Calculation Fields tables and creates data file UVBCX01_PART.DAT.

The script name for your upgrade path is:

```
UVBCX01.DMS
```

Properties

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

Task 5-13-7: Deleting Obsolete Objects

This is an optional step. SQL objects containing KPI expression information will become orphans or obsolete after this process. If you choose to perform this step and remove the obsolete SQL objects, then this step must be done now. The script will delete rows from the following tables:

- PSSQLDEFN
- PSSQLDESCR
- PSSQLTEXTDEFN
- PSSQLLANG

Run data mover script UVBCX02.DMS.

Properties

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

Task 5-13-8: Importing KPI Calculation Definitions

In this step, you will import KPI Calculation Definitions. This data will be used in the KPI Manager mass compile process to create KPI expressions.

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The first section of this Data Mover script imports only the earliest effective dated rows from the KPI Calculation Definition and Calculation Fields tables. Its input data file is UVBCX01_PART.DAT. The second section imports non-expression KPOPERANDS rows into the PF_DATAMAP_DEFN and PF_DATAMAP_COL tables. Its input data file is UVBCX03_KPDM.DAT. This is PeopleSoft delivered system data taken from the EPM Demo database. In addition, all KPI expressions are deleted from the metadata tables.

The script name for your upgrade path is:

```
UVBCX03.DMS
```

Properties

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

Task 5-13-9: Recompiling Application Rules

In this step, you will recompile each Rule/Element in each application to look for Rule/Element errors. This will ensure that the Rules and SQL Object IDs assignments you had before the upgrade are still valid. You will recompile the following rules and elements for products you have licensed:

- Enterprise Warehouse Data Manager Rules
- Security Groups
- Workforce Analytics DataSets
- Financial Analytics Stratification Rules
- Scorecard Data Element
- Scorecard Calculation Definition
- Scorecard Calculation Rule
- Scorecard KPI Dimensions
- Scorecard Definition
- Activity Based Management Implicit Pointers
- Activity Based Management Transaction Pointers

To recompile application rules:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes.
2. Click Add New Run Control ID.
3. Enter a new run control ID value and click Add.

   The Compile Metadata Changes page is displayed.
4. In the When field, select *ALWAYS*.
5. Enter a description.
6. In the Metadata Type group box, clear all of the check boxes.

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7. In the other group boxes, select the check boxes for all other items that are applicable to your system.
8. Click Save.
9. Click Run.
10. On the Process Scheduler Request panel, click OK to run the process (it will run a few hours).

    Use Process Monitor to check the success of the process (PF_COMPILE).

    Important! If you get errors in the application rules compile, you must fix them and rerun the mass compile before proceeding with the upgrade.

    See Appendix: "Fixing Compilation Errors."
11. Select Financial Services Industries, Product Portfolio, Stratification to open the Stratification Rules page.
12. Recompile the Financial Analytics stratification rules.

See Also

PeopleSoft Enterprise Application Fundamentals for Financial Services Industry PeopleBook, "Setting Up and Performing Stratification"

Properties

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

Task 5-13-10: Importing KPI Calculation Data

In this step, you will run a Data Mover script that imports all rows into the KPI Calculation Definition and Calculation Fields tables. The script uses input data file UVBCX01_FULL.DAT.

The script name for your upgrade path is:

```
UVBCX04.DMS
```

Properties

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

Task 5-13-11: Fixing KPI Calculation Definitions

For the KPI Manager Rules Mass Compile pass only, KPI Calculation Definitions with multiple effective dates must be resaved in the KPI Calculation Definition page to prevent the mass compile process from terminating with an abend.

To identify and fix multiple effective dated rows:

1. On your Copy of Production database, from the main menu, select Reporting Tools, Query, Query Viewer.

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2. Run the following query and save the results:

   `UPG_KPCALC_01`

3. From the PeopleSoft menu, select Key Performance Indicators, Administration, Building Blocks, Calculations.
4. For every row returned by the query, do the following:
   a. Enter the setID and Caculation ID values returned by the query into the search record.
   b. Select the Correct History check box.
   c. Click Search.

      The Calculation page will be displayed.
   d. Note the Rounding value; change it to force a save.
   e. Click Save.
   f. Change the Rounding value back to its original value.
   g. Click Save again.

Properties

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

Task 5-13-12: Running KPI Manager Rules Compile

In this step you will run the mass compile again. This pass of the mass compile will compile all of the KPI calculation definitions and calculation rules.

To run the KPI manager rules compile:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes.
2. Click Add New Run Control ID.
3. Enter a new run control ID value and click Add.

   The Compile Metadata Changes page is displayed.
4. Enter a description for the mass compile into the Description field, for example "*KPI Calculations and Rules*."
5. In the When drop-down list box, select *Always*.
6. Select the Clear All option, the right-most check box in the upper right corner.

   This will clear all of the check boxes on the page.
7. Select the Calculation Definition and Calculation Rule check boxes in the Scorecard section.
8. Click Save.
9. Click Run.
10. On the Process Scheduler Request page, click OK to run the process (it will run several hours).
11. Make a note of the process instance number.

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Use Process Monitor to check the success of the process (PF_COMPILE).

Important! If this pass terminates with an abend, you must fix all errors and rerun the process. For this pass only, informational errors can be ignored, as long as the process terminates normally.

See Appendix: "Fixing Compilation Errors."

Properties

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

Task 5-13-13: Running the Metadata Audit

In this step, you will run the metadata audit to look for metadata errors.

To run the metadata audit:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Audit EPM Objects, Add New Run Control ID.
2. Enter a Run Control ID, and click Add.
3. In the When field, select *ALWAYS*.
4. In the Performance Mgmt Warehouse group box, select *Metadata*.
5. Click Save.
6. Click Run.
7. On the Process Scheduler Request panel, click OK to run the process.

   Use Process Monitor to check the success of the process (PF_EPM_AUDIT).

Important! If you get errors in the metadata audit, you must fix them and rerun the mass compile before proceeding with the upgrade.

See Appendix: "Fixing Compilation Errors."

Properties

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

Task 5-13-14: Reviewing the Metadata Audit Results

In this step, you will review the metadata audit results and make any required repairs.

To review the metadata audit results:

1. Select EPM Foundation, Job Processing, Review Jobstream Content, Engine Messages.
2. Select the Process Instance of the Metadata Audit run.

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3. Click the Message Detail tab.
4. Click the Search icon to populate the details.
5. Scroll through the detail error messages.

   You can ignore error message numbers 110, 130, and 140. These error messages are caused by products that are not installed. You will need to fix all other error messages before proceeding.
6. Repeat the metadata audit process until only the acceptable errors remain.

Properties

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

Task 5-14: Upgrading Legacy Business Unit Mappings

This section discusses:

- Understanding Legacy Business Unit Mappings
- Backing Up Business Unit Tables
- Running Dimension Mapper ETL Jobs
- Defining Warehouse Sources
- Generating Source Lineage
- Enabling Query Security
- Confirming All Inputs Are Present
- Completing the Mapping Process

Understanding Legacy Business Unit Mappings

If you are upgrading your warehouse to the latest PeopleSoft release, you probably want to recreate your previous business unit mappings in order to maintain consistency with historical data. A set of tools collectively called Dimension Mapper will help you complete this process aided by several PS/Query objects and the application engine.

This task focuses on the steps required for upgrading business unit mappings. Refer to the EPM PeopleBooks for additional information on running Dimension Mapper.

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up Warehouse Business Units.”

Task 5-14-1: Backing Up Business Unit Tables

Before you begin, make sure you have backup copies of the following tables:

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- BUS_UNIT_TBL_PF
- BUS_UNIT_TBL_FS
- SETID_TBL
- SET_CNTRL_TBL
- SET_CNTRL_GROUP
- SET_CNTRL_REC

The database backup that you made after completing data conversion previously should have included these tables. If for some reason you need to redo the business unit upgrade process described in this task, you can restore these tables and start over.

Task 5-14-2: Running Dimension Mapper ETL Jobs

First you need to run the ETL jobs that populate the input tables required by Dimension Mapper.

To run the Dimension Mapper ETL jobs:

1. Set up the ETL maps.

   See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for the new release, “Loading Data Into EPM Foundation.”

2. For each source that you are bringing into the warehouse, make a record of the source system ID for use in the next step, “Define Warehouse Sources.”

Properties

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

Task 5-14-3: Defining Warehouse Sources

You need to define a warehouse source for each source system ID that you created in the previous step.

To define warehouse sources:

1. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Define Warehouse Sources.
2. Select the Add Warehouse Source tab.
3. Enter a source system ID.

   For each source system, you must enter the corresponding source system ID that you defined in the previous step, “Run Dimension Mapper ETL Jobs.” For example, if you defined two source system IDs called FSCM1 and HCM1, then you will need to use these exact strings in the Source System Identification field in the Define Warehouse Sources page.

4. Select a default SetID.

   For each warehouse source, you will need to define a default SetID. The default SetID is not used in the upgrade process. But if you later create new business units in a source system and import them into the warehouse, the Business Unit Wizard will use the default SetID. Therefore, chose a default SetID for each source system that you would use when creating business units in the respective system. If the system in

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question is not a PeopleSoft system, then choose a default SetID that will help you identify data from that system if you need to later trace data back to the source.

5. Set the other defaults for warehouse business unit (WBU) creation.

   There are several other parameters requested in the warehouse source definition, including a default currency and a default rate type. As with default SetID, these defaults are not used in the upgrade process but would be used later if you run the Business Unit Wizard.

Properties

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

Task 5-14-4: Generating Source Lineage

Source lineage identifies the connection between source and target tables. This information is used by Dimension Mapper to validate your mapping configuration. To generate source lineage, you must associate the appropriate source blueprint with each source system.

To generate the source lineage:

1. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, View Source Blueprint.
2. Review the source blueprints to ensure that the blueprints for your sources are present. Blueprints for all supported systems ship as system data.

   Note. The FSCM blueprint includes lineage information for ESA, SCM, and Financials. A blueprint for PeopleSoft EnterpriseOne (E1) is also provided. Enterprise Learning Management (ELM) is not SetID based, so you can use the NONSETID blueprint for ELM sources You should also use the NONSETID blueprint for third-party systems that are not SetID based.

3. If you have modified your system by adding new SetID-based tables to your PeopleSoft pillar and you brought these tables into dimensions in EPM, then you may need to update the generic blueprint for that system.

   Customizations have no impact on the blueprints as long as they do not impact the key structure of source or target tables. For example, adding new columns to an existing source table or warehouse dimension will have no impact on a blueprint.

   See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up Warehouse Business Units.”
4. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Warehouse Lineage.
5. Associate the correct blueprint to each of your sources.
6. Click the Save button.

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Properties

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

Task 5-14-5: Enabling Query Security

You must enable query security in order to run PS/Query objects in the following step, "Confirm All Inputs Are Present."

To enable the query security:

1. From the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_EW in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_EW link from the grid.
5. Click the Insert Child Group icon.
6. Enter DM_UPGRADE_GROUP in the Access Group field.
7. Click the Add button.
8. Enter "Dimension Mapper Upgrade Group" in the Description field.
9. Click OK.
10. Click the DM_UPGRADE_GROUP - Dimension Mapper Upgrade Group link.
11. Click the Insert Child record icon.
12. On the Add Child Record page, enter PF_SRC_LINEAGE in the Record (Table) Name field.
13. Click the Add button.
14. Repeat steps 11-13 for the following records:
    - PF_SRC_SETCNTRL
    - BUS_UNIT_SRC_PF
    - PF_SRC_BU_NAMES
    - PF_SRC_BU_ROLES
15. Click the Save button.

Properties

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

Task 5-14-6: Confirming All Inputs Are Present

At this point, all of the information that you need to complete the mapping process should be present. You should check the tables before proceeding by running the following PS/Query objects.

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To confirm that all necessary information is present:

1. Run the UPG_EW_DM_SRC_LINEAGE PS/Query object.

   You should see lineage rows for each of your sources. If rows are not present, see “Define Source Lineage” previously.

2. Run the UPG_EW_DM_SRC_BU_NAMES PS/Query object.

   You should see all of the business units that you expect from each source. If the business units are not present, see “Run Dimension Mapper ETL Jobs” previously.

3. Run the UPG_EW_DM_SRC_BU_ROLES PS/Query object.

   You should see role data for your source business units. A role is a business unit type such as AP, GL, INV, and so on. If role data is not present, see “Run Dimension Mapper ETL Jobs” previously.

4. Run the UPG_EW_DM_SRC_SETCNTRL PS/Query object.

   You should see one row for each of your defined sources with the number or rows in SRC_SETCNTRL for each source. If rows are not present for one or more sources, see “Run Dimension Mapper ETL Jobs” previously. For each PeopleSoft pillar, you should expect the number of rows to be approximately equal to the following formula:

   ```
   ((# Business Units) + (# SetIDs in the Pillar)) × (# SetID-Based Tables in the⇒
    Pillar)
   ```

   The following PeopleSoft pillars have the following number of SetID-based tables:

   - CRM 8.9: 1,350 tables
   - FSCM: 4,173 tables
   - HCM 8.9: 784 tables

5. Run the UPG_EW_DM_BAD_SETCNTRLS PS/Query object.

   Occasionally, there could be corrupt data in the source pillar if someone entered data directly into the database instead of using the EPM application. This query identifies any business unit names that are greater than five chars, that are null, or that contain only a dash. These values must be removed or the following validation step may fail.

Properties

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

Task 5-14-7: Completing the Mapping Process

In this step, you will complete the legacy business unit mapping process.

To migrate your legacy business unit mappings to the new mapping table:

1. Run the application engine program UPG_EF_8903 with the upgrade user ID from the command line as follows:

   ```
   $PS_HOME\bin\client\winx86\psae -CD dbname -CT dbtype -CS dbservername -CO oprid⇒
    -CP oprpswd -R UPG_EF_8903 -AI UPG_EF_8903
   ```

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2. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Business Unit Mapping.

   You should see each of your source business units mapped to an appropriate WBU. However, the application engine program will not map legacy business units that had a one-to-many mapping.

3. In the unlikely event that you have business units that had a one-to-many mapping, you will have to map them manually. Use the following query to identify business units this type:

   UPG_EW_DM_BU_SPLITTING

   This query identifies the multiple WBUs that each source business unit mapped to in the past. You must select one of these WBUs for each source business unit to use going forward.

4. SetIDs are not be mapped by the application engine program. For each SetID, select the appropriate SetID in the warehouse.

   An exact match should be present, unless you had previously remapped source SetIDs using a Data Loader lookup table. If this is the case, you must determine and recreate the historical mapping relationships that existed in your previous system.

5. Validate the new mapping by clicking the Validate button.

   The system will check the mapping configuration.

6. When the grid appears, select “Conflict” from the list box.

   The grid should become empty. If conflicts are detected, then a one-to-many mapping is present between a source SetID and two or more warehouse SetIDs on the same warehouse record. This situation must be corrected.

7. If there are conflicts:

   a. Identify which business units are conflicting and where (which records).

   b. Modify the warehouse SetID assignments to remove the conflicts.

   c. Return to the Business Unit Mapping page and repeat the validation process until no conflicts are present.

Properties

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

Task 5-15: Upgrading GC Journal Publish Mapper Rules

For the Global Consolidations (GC) application, the journal publish rule is modified to use Enterprise Warehouse data mapper rule group to perform ChartField mappings. For journal publish rules that were used by the consolidation models based on ledger template GCCLEDMGT, the system will associate a data mapper rule group DFLTJPUBG1 with the PeopleSoft General Ledger Account Entry field if it was selected; it will associate a data mapper rule group DFLTJPUBG2 with the Global Consolidations Accounting Entry field if it was selected. The DFLTJPUBG1 rule group contains one data mapper rule set, DFLTJPUBR1. The DFLTJPUBG2 rule group contains one data mapper rule set, DFLTJPUBR2.

In this task, you will manually migrate the mapping of Global Consolidations Affiliate and Ledger fields from the query results compiled in a previous task to the data mapper rule.

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See “Prepare Your Database,” Running GC Journal Publish Rule Query.

To upgrade the Global Consolidations journal publish mapper rules:

1. Select EPM Foundation, Data Enrichment Tools, Data Mapper, Rule Set.
2. Select the data mapper rule set DFLTJPUBR1 (default General Ledger account entry map) under setID SHARE in the Correction History mode.
3. Select the Data Mapper Rule Set tab.
4. In the Rule Set Columns region, specify the value for target column Ledger based on the query results from the previously run query.
5. Change the map method to *Use Source* for target column Affiliate.
6. Select the source column to map based on the query results from the previously run query.
7. Click Compile.
8. Save the changes.
9. Select the data mapper rule set DFLTJPUBR2 (default GC account entry map) under setID SHARE in the Correction History mode.
10. Select the Data Mapper Rule Set tab.
11. In the Rule Set Columns region, specify the value for target column Ledger based on the query results from the previously run query.
12. Click Compile.
13. Save the changes.

Note. For a setID that is not SHARE, you should create a data mapper rule set and rule group similar to delivered rule sets and rule groups DFLTJPUBG1, DFLTJPUBG2, DFLTJPUBR1, and DFLTJPUBR2. Then follow the preceding steps.

Properties

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

Task 5-16: Fixing Scorecard User Security

This section discusses:

- Enabling Scorecard User Query
- Identifying Scorecard User Security Values

In the new release, Scorecards were changed so that they no longer need security entries in the Enterprise Warehouse Security objects.

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In this task, you will first enable the Scorecard user query. Then, you will run that query to generate a list of all your current Scorecard user security values. The Scorecard user security values returned by this query should be analyzed. If it is determined that any of the users returned by the query need access to the scorecards, then you will need to grant those users Scorecard access using the new Enterprise Warehouse Security objects.

Note. This task applies only to customers using Scorecard products.

Task 5-16-1: Enabling Scorecard User Query

To enable Scorecard user query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_BSC in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_BSC link from the grid.
5. Click the BSC_ACCESS_GROUP – BSC_ACCESS_GROUP link.
6. If you do not see record UPG_BC_SECURITY under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP – BSC_ACCESS_GROUP.
7. On the Add Child Record page, enter UPG_BC_SECURITY in the Record (Table) Name field.
8. Click the Add button.
9. If you do not see record BC_BSC_DFN under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP – BSC_ACCESS_GROUP.
10. On the Add Child Record page, enter BC_BSC_DFN in the Record (Table) Name field.
11. Click the Add button.
12. If you do not see record BC_BSC_PLIST under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP – BSC_ACCESS_GROUP.
13. On the Add Child Record page, enter BC_BSC_PLIST in the Record (Table) Name field.
14. Click the Add button.
15. Click the Save link above the tree.

Properties

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

Task 5-16-2: Identifying Scorecard User Security Values

To identify scorecard user security values:

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

```
UPG_BC_SECURITY
```

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3. Save the query results.

If no rows were returned from the query, all of the Scorecard user security values were successfully converted in the Scorecard Definition tables; skip the rest of this task. If rows were returned, then refer to the following PeopleBooks to grant user security to the Scorecard dimension.

See the PeopleSoft Enterprise Scorecard PeopleBook for your new release, "Defining Your Strategy and Establishing Scorecards."

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, "Securing EPM," Securing Dimensions and Metrics.

Properties

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

Task 5-17: Fixing Scorecard User Defaults

This section discusses:

- Enabling Scorecard User Defaults Query
- Identifying Scorecard User Default Values

In the new release, scorecards were changed so that they no longer need security entries in the Enterprise Warehouse Security objects. Instead, all Scorecards have been converted to personal scorecards. As a result of these changes, some data in the My Profile page under the Scorecard menu was not upgraded.

In this task, you will run a query that will provide you with a list of all your current Scorecard user default values. The Scorecard user defaults returned by this query should be analyzed. If it is determined that any of the users returned by the query need to have correct default Scorecard data set up, then you will need to select a Scorecard in the My Profile page.

Note. This task applies only to customers using Scorecard products.

Task 5-17-1: Enabling Scorecard User Defaults Query

To enable the Scorecard user defaults query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_BSC in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_BSC link from the grid.

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5. Click the BSC_ACCESS_GROUP – BSC_ACCESS_GROUP link.
6. If you do not see record BC_OPR_DEFAULTS under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP – BSC_ACCESS_GROUP.
7. On the Add Child Record page, enter BC_OPR_DEFAULTS in the Record (Table) Name field.
8. Click the Add button.
9. Click the Save link above the tree.

Properties

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

Task 5-17-2: Identifying Scorecard User Default Values

To identify Scorecard user default values:

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

```
UPG_BC_USER_DEFAULTS
```

3. Save the query results.

If no rows were returned from the query, all of the Scorecard user default values were successfully converted in the Scorecard User Defaults table; skip the rest of this task. If rows were returned, then fix the data as described in the following step.

If rows were returned, then refer to the Scorecard PeopleBook to assign the proper scorecard to each user returned by the query.

See the PeopleSoft Enterprise Scorecard PeopleBook for your new release, “Monitoring Scorecards and KPIs,” Establishing Profiles and Portal Preferences.

Properties

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

Task 5-18: Fixing KPI Assessment Images

This section discusses:

- Enabling the KPI Assessment Image Query

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- Identifying KPI Assessment Definitions

In the new release, some delivered image objects were changed or removed from PeopleTools tables. Some of the changed or deleted image objects may be referenced in the KP_ASSESS_DFN table.

In this task, you will run a query that will provide you with a list of all your KPI assessments that reference images which are no longer valid. The assessment definitions returned by this query must be fixed.

Task 5-18-1: Enabling the KPI Assessment Image Query

To enable the KPI assessment image query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_KPI in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_KPI link from the grid.
5. Click the KPI_ACCESS_GROUP – KPI_ACCESS_GROUP link.
6. If you do not see record KP_ASSESS_DFN under the KPI_ACCESS_GROUP, then click the Insert Child record icon next to KPI_ACCESS_GROUP – KPI_ACCESS_GROUP.
7. On the Add Child Record page, enter KP_ASSESS_DFN in the Record (Table) Name field.
8. Click the Add button.
9. Click the Save link above the tree.

Properties

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

Task 5-18-2: Identifying KPI Assessment Definitions

To identify KPI assessment definitions:

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

   ```
   UPG_KPI_ASSESS_IMG
   ```

3. Save the query results.

   If no rows were returned from the query, all of the assessment image values were successfully converted in the KPI Assessment Definition table; skip the rest of this task.

4. From the PeopleSoft menu, select Key Performance Indicators, Administration, Building Blocks, Assessments to navigate to the Assessment Definition page.
5. For every row returned by the query, do the following steps:

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a. Enter the setID and Assessment ID values returned by the query into the search record.
b. Select the Correct History check box.
c. Click Search.
   The Assessment Definition page will be displayed.
d. Select an image ID from the prompt table.
e. Click Save.

Properties

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

Task 5-19: Updating KPI Descriptions

In the new PeopleSoft release, Key Performance Indicator (KPI) dimension member description values are being stored in the new KP_KPI_DSCR_F00 fact table to improve performance when viewing the KPI pages.

In this task, Application Engine program UPG_KP_02 will load the values in the new KP_KPI_DSCR_F00 fact table for all the data that already exists in the KP_KPI_CALC_F00 fact table.

Properties

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

Task 5-20: Installing the EPM Charting Tool

This task is required for all EPM products that use AVS charts. If you have not done so already, install the EPM charting tool.

See the PeopleSoft Enterprise Performance Management Installation Guide for your new release, “Install the EPM Charting Tool (AVS).”

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Properties

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

Task 5-21: Preparing the Content Provider Registry

You should perform this task if you use Enterprise Portal 8.4 or higher running on PeopleTools 8.4x with full or partial navigation load access method. This means 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 Enterprise Portal database. PeopleSoft 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 Enterprise Portal database by updating the portal registry structures in your Enterprise Portal database to match what is in the Content Provider database. Follow the detailed instructions in the appendix referenced below.

See Appendix: "Upgrading the Content Provider Registry."

Properties

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

Task 5-22: Updating the Portal Options Data

In this step you update the PeopleTools Portal Options data.

Note. Only perform this step if your upgraded database is on PeopleTools 8.46 or greater.

This step sets the portal options prefix and Owner ID. These values are used when creating Pagelet Wizard definitions and Navigation Collection objects.

To set the Portal Options Prefix and Owner ID:

1. From your browser, sign on 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.

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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 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 5-23: Stamping the Database

In this step, you set the database to the release level of the Demo database. The values you enter here appear whenever you view the Help, About PeopleTools dialog.

To stamp the database:

1. Launch Application Designer on your Copy of Production database using the new PeopleSoft release.
2. Select Tools, Upgrade, Stamp Database...
3. Fill in all three of the PeopleSoft Release fields with the appropriate value for your product line and release number:

   `EPM 9.00.00`

4. In the Service Pack field, enter the service pack number to which you are upgrading. For example, if you are upgrading to SP2, enter the number *2*. If you are upgrading to a release that is not at a service pack level, enter *0*.
5. Click Stamp.
6. Close Application Designer.

Properties

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

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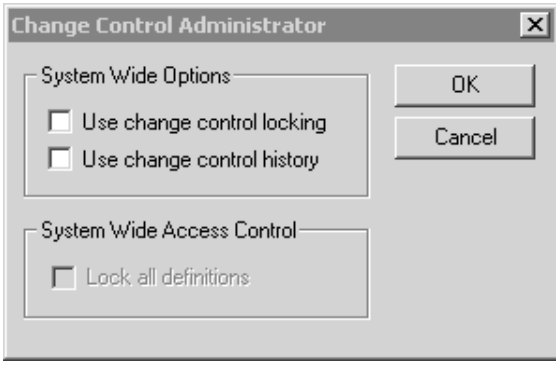
Task 5-24: Reviewing Change Control

Earlier in the upgrade process, in the beginning of the chapter "Apply 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 Application Designer.
2. Select Tools, Change Control, Administrator.

   The following dialog box appears:



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 "Apply PeopleTools Changes," Turning Off Change Control.

Properties

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

Task 5-25: 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.

See Appendix: "Planning for Upgrade Testing."

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Properties

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

Task 5-26: Testing Your Copy of Production

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

See Appendix: “Planning for Upgrade Testing.”

Properties

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

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CHAPTER 6

Apply Changes to Production Database

This chapter discusses:

- Understanding the Move to Production
- Testing the Move to Production
- Testing Once More
- Performing the Move to Production
- Completing the Upgrade Survey

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 6-1: Testing the Move to Production

This section discusses:

- Understanding the Move to Production Test
- Understand Move to Production
- Creating a New Change Assistant Job

Understanding the Move to Production Test

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 and to troubleshoot issues. The Test Move to Production pass is a different series of steps, which includes a subset of the previous tasks, and takes advantage of the tasks performed during the first upgrade pass.

You should perform as many test moves to production as necessary to work out any issues and to be comfortable with the process. During each Test Move to Production you will be able to refine the process so that you can save time and avoid manual processes. These test passes will also let you know how long the process takes so you can plan your production downtime for your move to production weekend.

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Task 6-1-1: Understand Move to Production

The following text is a high level view of what you will be doing in the Move to Production test pass. The remaining steps in this task will prepare your test environment. For example, you may need to move some scripts generated in the initial pass to a new Change Assistant staging directory. Next you will create a new Change Assistant job, setting the Type of Upgrade to Move to Production. That will give you a job with steps filtered with only those steps that apply to the Move to Production (MTP) test pass. From that point forward, you will simply follow the steps as they exist in your new job.

One of those first steps will be to take a Copy of Production. This second Copy of Production is sometimes referred to as the "New Copy of Production." The first Copy of Production, or "old" Copy of Production, will now be the Source database (it was the Target database in the initial test pass). The New Copy of Production is now the Target database.

The steps executed in the MTP pass vary in several ways. Many of the tasks/steps in the initial test pass will be replaced in the MTP pass with Data Mover export and import scripts. In the initial pass, some steps required you to make functional decisions and take time to manually setup 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 Data Mover script, MVPRDEXP, will export all the tables that contain the PeopleTools objects like records and PeopleCode from the first database. Another Data Mover script, MVPRDIMP, will import those tables into the second database. Anything you have done to PeopleTools objects while executing or testing the first pass—copied objects from DMO, reapplied customizations, applied updates from the PeopleSoft Customer Connection website—will be moved to the second Copy of Production with these scripts.

Another important difference with the MTP pass is the handling of SQL scripts that create and alter tables. In the initial pass, you generated the SQL scripts, sometimes edited the SQL script, and then executed the SQL scripts. In the MTP pass, you may be able to skip the generation steps and use the SQL you previously generated. This is another way to save time in your critical go-live window and is the ultimate goal, but it is an incremental process to get to that point.

In the first MTP pass, everyone must regenerate the SQL. There are small differences between the initial and MTP passes that require the SQL to be regenerated in at least one MTP pass. The Change Assistant Templates are delivered with the steps set this way.

In subsequent MTP passes, you may choose to "turn off" the generation steps if possible. If you have not changed any records at the end of one MTP pass, then you can reuse the SQL in your next pass. If you have done anything to change records, you should generate SQL again. This can include things like applying PeopleTools upgrades (for example, 8.47 to 8.48), or applying updates from the PeopleSoft Customer Connection 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 the step will never show up in your MTP filtered job again. To change the step properties, double-click on the step to open the Step Properties dialog, and change the Type of Upgrade to Initial Upgrade. In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. Change Assistant will look for the SQL scripts in the output directory set on the job's Database Configuration, so make sure it will find them when it tries to run them.

The steps that are eligible for this treatment will contain Move To Production documentation notes indicating such.

Note. If you have made any changes to your trees, tree structures, or PS/Query objects since the upgrade began, you may want information on how to preserve those changes.

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See Appendix: "Preserving Queries and Tree Objects."

Properties

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

Task 6-1-2: Creating a New Change Assistant Job

You need to create a new Change Assistant Job for each test Move to Production pass.

To create a new Change Assistant job:

1. PeopleSoft recommends that you use new output and stage directories for each new test pass. Create those directories now.
2. From Change Assistant, select Tools, Options and specify the new output and staging directories on the Change Assistant Options page.
3. Select File, Open Environment and select the environment.
4. Review the configuration on the General Settings window.

   The Database Type, Language and SQL Query Executable will be the same as your previous job. Make changes to the PS_HOME settings, if necessary, and select Next.
5. Specify the Source Database setup information and click Next.

   This is the Copy of Production database from your previous pass.
6. Specify the Target Database setup in formation and click Next.

   This is the new Copy of Production database.
7. Review the environment configuration on the Confirm Selections window and click Next to save the changes to the environment.
8. Select File, New Job.
9. Select the template on the Use Template window and click OK.
10. On the Type of Upgrade window, select Move to Production.
11. Click OK.

    A new upgrade job using the naming convention of *Template_Environment*_Move to Production is created.
12. Highlight the job name and select Edit, Set Documentation Directory, then select the directory where the documentation is located and click OK.

    If you have been using documentation printed from the filtered view on the jobs, print the documentation again. The steps for Move to Production are different than in the initial pass.
13. Select View, Documentation.
14. Select View, Expand All to display all the steps in the job that apply to your upgrade.

    The job will contain steps that were not in the initial upgrade pass and will exclude some steps that were in the initial upgrade pass based on the step properties.

Now you are ready to run the job.

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Properties

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

Task 6-2: 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.

See Appendix: "Planning for Upgrade Testing."

Properties

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

Task 6-3: 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

Task 6-4: Completing the Upgrade Survey

We are interested in feedback on your upgrade experience and any thoughts and/or suggestions you have on how we can improve the process in the future. Note that this survey should only be accessed once you have completed your upgrade and are in production on the new release.

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See Also

http://www.peoplesoft.com/go/upgradesurvey

Properties

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

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CHAPTER 7

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

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APPENDIX A

Applying Fixes Required for Upgrade

This appendix discusses:

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

Task A-1: Preparing to Apply Fixes

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

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

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

To apply files and fixes:

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

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

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

Task A-2: Applying Fixes During Installation

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

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

To apply script fixes during installation:

1. Download Required for Upgrade Change Package(s) using the "Download Change Package" functionality in Change Assistant.
2. Use Change Assistant to install/apply the update(s) into your New Release Demo database. Review the documentation included with each update prior to applying each update. There may be manual steps that need to be performed in order to successfully apply the update.

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

Task A-3: Applying Fixes After Copying Project

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

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade Change Package(s) using the "Download Change Package" functionality in Change Assistant.
2. Use Change Assistant to install/apply the update(s) into your New Release Demo database for this upgrade pass. Review the documentation included with each update prior to applying each update.

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, "Applying Updates."
3. The project is now loaded on your New Release Demo database. You should run a project compare to make sure 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.

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4. If you are performing a Move to Production upgrade pass, first migrate the Change Package(s) into the Source database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the Change Package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply them to your Source database.

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

5. Migrate the Change Package(s) into the Target database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Target database.

Task A-4: Applying Fixes After Data Conversion

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

Task A-5: Applying Fixes Between Upgrade Passes

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

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Task A-6: Applying Fixes in Move to Production

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

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APPENDIX B

Changing the User Interface

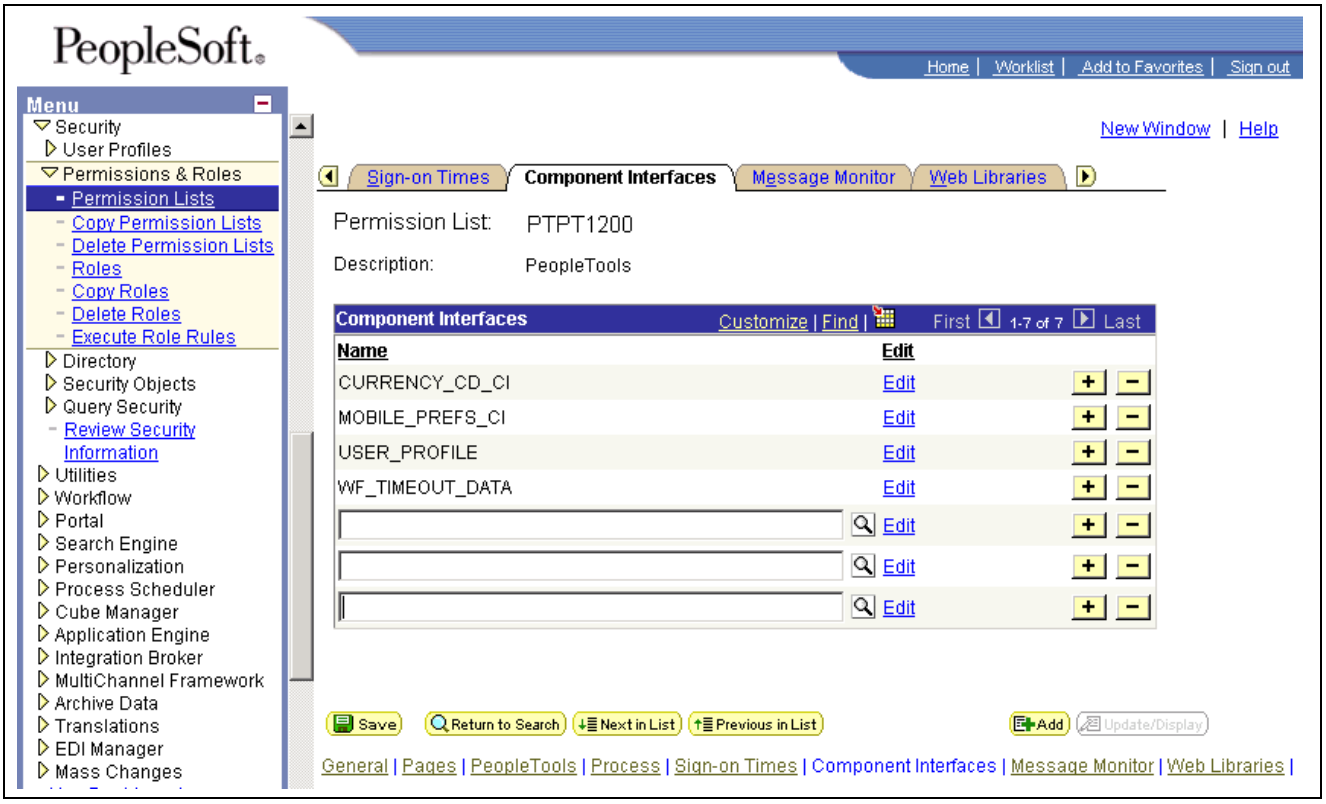
This appendix discusses:

- Change the User Interface
- Change the User Interface for Mobile

Task B-1: Change the User Interface

Three user interface options were delivered with your current release of PeopleSoft 8.x. The classic style, the style seen in previous releases of your PeopleSoft application, is set as your default style. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The classic style, shown below, is set as your default style delivered with your PeopleSoft release.



The classic style user interface option

The following example represents the light blue style.

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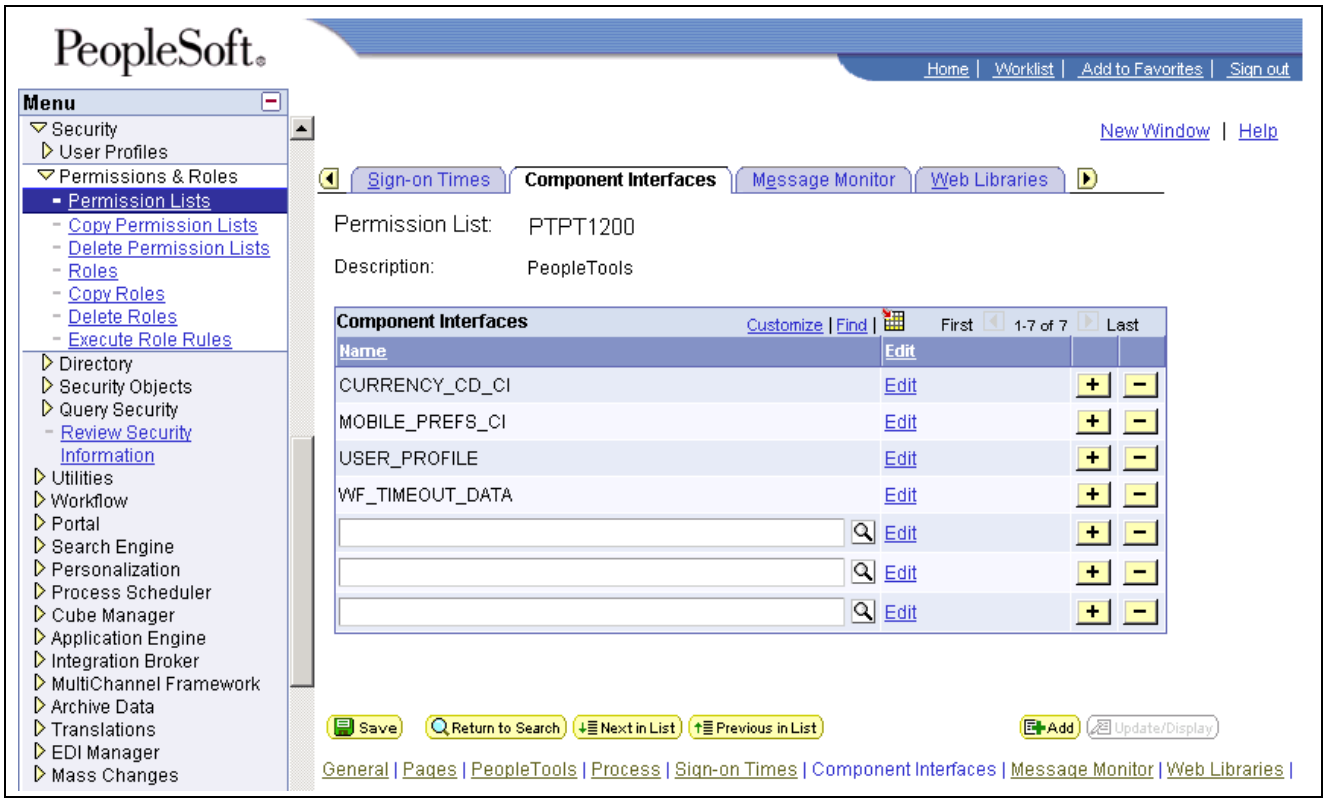
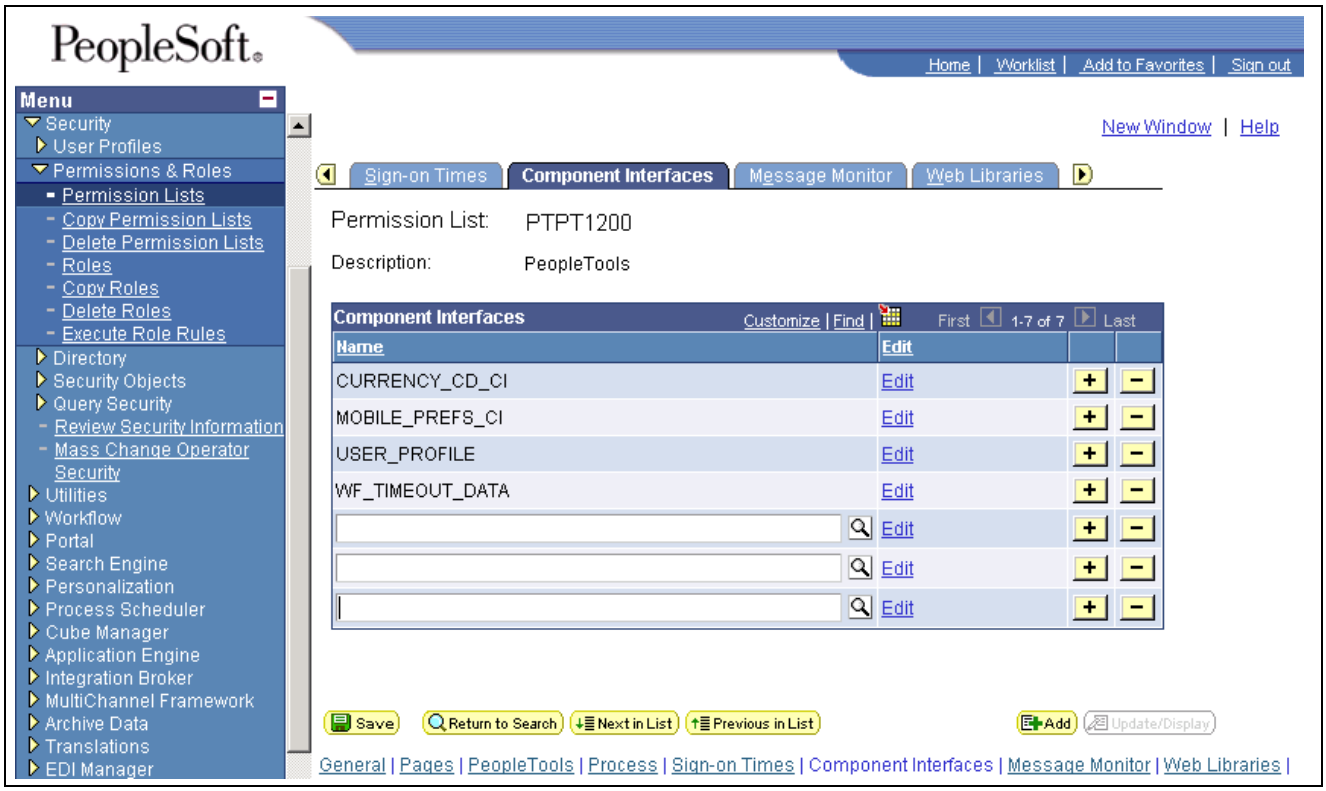


The light blue style user interface option

This example represents the dark blue style.



The dark blue style user interface option

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

To change your styles, you must delete the substyle sheets associated with the classic style and replace them with either the light or dark blue substyle sheet.

Note. The new user interface looks are supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If using a browser and release other than these, the system defaults to the classic style.

To enable one of the new user interface looks:

1. In Application Designer, open the stylesheet PSSTYLEDEF.
2. Click on the PSALTERNATE Sub Style Sheet, and press Delete.
3. Select Insert, Insert Sub Style Sheet.
4. Select PSALTERNATE_LIGHTBLUE or PSALTERNATE_DARKBLUE.
5. Repeat steps 1 through 4 for the PTSTYLEDEF and PSACE Sub Style Sheets, making sure to use the same extension (_LIGHTBLUE or _DARKBLUE) as you did for PSALTERNATE.
6. Select Save.
7. Open the stylesheet PSQUERYSTYLEDEF.
8. Click on the PTQUERYSTYLESUB Sub Style Sheet, and press Delete.
9. Select Insert, Insert Sub Style Sheet.
10. Select PTQUERYSTYLESUB_LIGHTBLUE or PTQUERYSTYLESUB_DARKBLUE. Use the same extension as you did in Step 4.
11. Select Save.

Task B-2: Change the User Interface for Mobile

You use Related Content Projects to synchronize extraneous PeopleTools objects to a mobile device. In particular, you can use a Related Content Project to synchronize a new or customized stylesheet to the mobile device. Related Content Projects are associated with a Component Interface. PeopleSoft recommends that you associate a given Related Content Project with a synchronizable Component Interface that is common to your mobile application.

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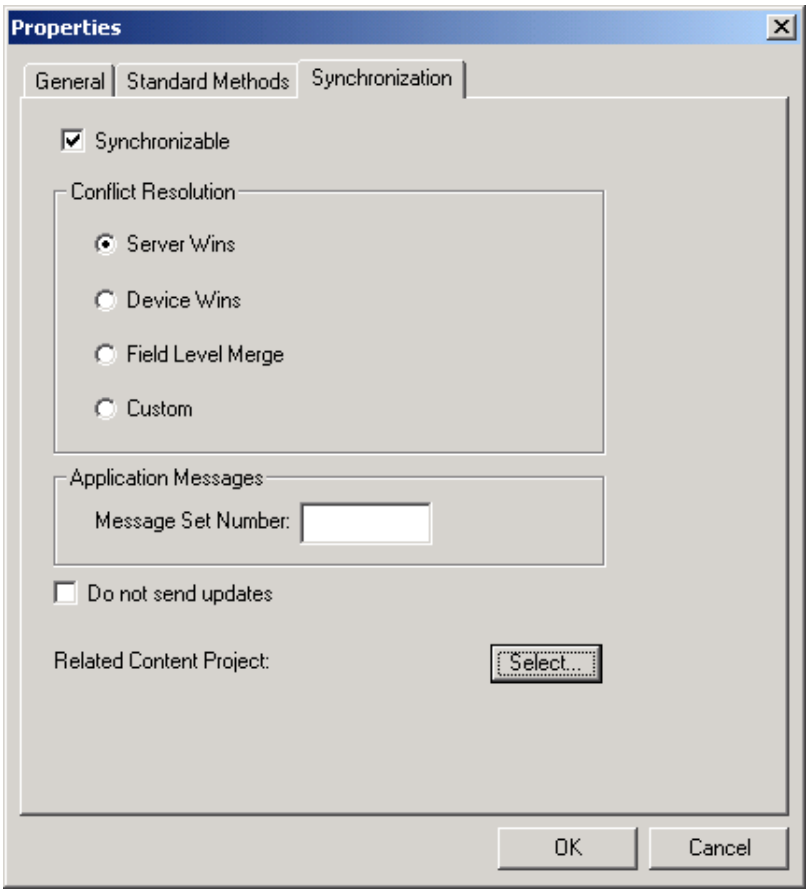

The Synchronization tab

To change the user interface look for mobile applications:

1. Follow the procedure above to add the new or customized stylesheet to a PeopleTools Project.
2. In Application Designer, open a synchronizable Component Interface that is common to your mobile application.
3. Open the Properties dialog box from the pop-up menu.
4. Select Synchronization.
5. Click Select for the Related Content Project.
6. Find and highlight the desired project and click Select.
7. Select Save.

   The stylesheet will be synchronized to the mobile device during the next Bootstrap or Update Applications synchronization.

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

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

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APPENDIX C

Fixing Compilation Errors

This appendix discusses:

- Understanding Fixing Compilation Errors
- Reviewing Mass Compile and Metadata Audit Errors
- Reviewing Application Rule Compilation Errors

Understanding Fixing Compilation Errors

Review this appendix to familiarize yourself with the various errors that can be encountered during the task "Synchronizing Metadata", and the appropriate action to take if you encounter these errors.

Task C-1: Reviewing Mass Compile and Metadata Audit Errors

This section discusses:

- Determining the Errors You Must Fix
- Determining the Errors You Can Ignore

You may get errors from the metadata audit. This section will help you determine if these errors can be ignored or if they must be fixed before proceeding with your upgrade.

Task C-1-1: Determining the Errors You Must Fix

PeopleSoft does not upgrade customer metadata built using PeopleSoft delivered system metadata. If there is an underlying physical table change, PeopleSoft delivers new system metadata. However, some customer metadata will not be upgraded with the newly defined system metadata.

If a system DataMap was changed because of an underlying physical table change, errors will occur in the mass compile or metadata audit. If you built one of the following metadata objects using PeopleSoft delivered system DataMaps, these metadata objects need to be refreshed and recompiled if the DataMap was changed from an earlier release:

- Expressions
- Filters

  You must fix all mass compile errors,except for the acceptable errors noted in the next section, and rerun the mass compile before proceeding with the upgrade.

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Other metadata objects will have mass compile errors, but do not need to be corrected. After the underlying metadata objects are fixed, the subsequent rerun of the mass compile will fix the other metadata object errors.

See PeopleSoft 8.8 Enterprise Warehouse PeopleBook: Setting Up and Using Metadata, "Setting Up and Using Metadata," Setting Up Filters.

See PeopleSoft 8.8 Enterprise Warehouse PeopleBook: Setting Up and Using Metadata, "Setting Up and Using Metadata," Setting Up Expressions.

Task C-1-2: Determining the Errors You Can Ignore

Some errors in the metadata audit log files are expected and can be safely ignored. If your errors match the error messages listed below, you do not have to fix them before proceeding to the next step.

Safe MetaData Audit Logfile Errors
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCALMAP PF_FILTER_CODE GCRECNCALMAP
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCALSRC PF_FILTER_CODE GCRECNCALSRC
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNLEDMAP PF_FILTER_CODE GCRECNLEDMAP
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNWCALMAP PF_FILTER_CODE GCRECNWCALMAP
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNWCALSRC PF_FILTER_CODE GCRECNWCALSRC
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCALMAP ACCOUNTING_PERIOD %AccountingPeriod
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCALSRC BUSINESS_UNIT %GC_LED_BU
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNLEDMAP PF_SCENARIO_ID %ScenarioId
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNWCALMAP ACCOUNTING_PERIOD %AccountingPeriod
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNWCALSRC PF_SCENARIO_ID %ScenarioId
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNWCALSRC BUSINESS_UNIT %GC_LED_BU
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. INV_RECV_LN_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. INV_TRANS_F00 Fieldname PF_TRANS_DT

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Safe MetaData Audit Logfile Errors
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. ITEM_VOL_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. RECV_SHIP_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. RTV_DISTRIB_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. SHIP_DTL_F00 Fieldname PF_TRANS_DT
Reference Keys do not exist. PF_TBLMAP_KY_RF PF_TABLE_MAP_CODE BOREL_BC RECNAME_REF RD_PERSON REF_KEY_FIELD
Reference Keys do not exist. PF_TBLMAP_KY_RF PF_TABLE_MAP_CODE INTERACT RECNAME_REF RD_PERSON REF_KEY_FIELD
Reference Keys do not exist. PF_TBLMAP_KY_RF PF_TABLE_MAP_CODE CUST_RPT RECNAME_REF SET_CNTRL_TBL REF_KEY_FIELD
Datamap built on Invalid TableMap PF_DATAMAP_DEFN DATAMAP_CODE BOREL_BC PF_TABLE_MAP_ CODE BOREL_BC DESCR BO_REL,BC,RED_PERSON
Datamap built on Invalid TableMap PF_DATAMAP_DEFN DATAMAP_CODE CUST_RPT PF_TABLE_MAP_CODE CUST_RPT DESCR CUSTOMER_RPT + SET_CNTRL_TBL
Datamap built on Invalid TableMap PF_DATAMAP_DEFN DATAMAP_CODE INTERACT PF_TABLE_MAP_CODE INTERACT DESCR Customer Interaction

Task C-2: Reviewing Application Rule Compilation Errors

PeopleSoft does not upgrade customer application rules built using PeopleSoft delivered system metadata. If there is an underlying physical table change, PeopleSoft delivers new system application rules. However, some customer application rules will not be upgraded with the newly defined system metadata.

If a system DataMap was changed because of an underlying physical table change, errors will occur in the mass compile. If you built any of the following application rules using PeopleSoft delivered system DataMaps, these application rules need to be refreshed and recompiled if the DataMap was changed from an earlier release:

- Data Manager Rules
- Allocation Manager Rules
- Technical Scenarios
- ABM Implicit Pointers
- ABM Transaction Pointers
- KPI Data Elements

You must fix all mass compile errors and rerun the mass compile before proceeding with the upgrade.

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Other application rules built on these objects will have mass compile errors, but do not need to be corrected. After the underlying application rules are fixed, the subsequent rerun of the mass compile will fix the other application rule errors.

See the PeopleSoft Enterprise Activity Based Management PeopleBook for your new release, “Setting Up Pointers.”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Using EPM Foundation Data Enhancement Tools.”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up and Configuring Data In the Operational Warehouse - Enriched (OWE).”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up Warehouse Business Units.”

See the PeopleSoft Enterprise Scorecard PeopleBook for your new release, “Establishing and Maintaining KPIs.”

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APPENDIX D

Improving Performance

This appendix discusses:

- Understanding Performance Improvement
- Planning Your Upgrade for Performance
- Performing the Upgrade
- Improving Performance for Your Platform
- Consulting the Global Support Center

Understanding Performance Improvement

Performance is always a challenge when you are upgrading. Much of the data currently in your database will be affected. No other batch processing works quite like it. Upgrade performance is sensitive to your unique environment and data. These performance recommendations are designed to help you improve performance during your upgrade.

Task D-1: Planning Your Upgrade for Performance

Review the following guidelines to help plan for better upgrade performance:

- Provide as much hardware, memory, and disk space as you can.
- Run long processes on a dedicated server, not the client. Configure that server similarly to your production environment.
- Size the Copy of Production database (Target) like your production database — allow for growth.
- Use a dedicated workstation, configured like the production environment.
- Provide an application server and process scheduler for the Target database on the new PeopleSoft release.
- Look for fragmented tables. Resize or reorganize the initial and next extends accordingly.
- Know which tables are your largest. This information will be valuable during the upgrade.

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Task D-2: Performing the Upgrade

This section discusses:

- Verifying the Database Structure Task
- Creating and Altering SQL Scripts
- Performing Data Conversion

Task D-2-1: Verifying the Database Structure Task

When performing the "Modifying the Database Structure" task, perform all recommended update statistics, so the optimizer can make a good decision.

Task D-2-2: Creating and Altering SQL Scripts

The following list provides tips to use when performing the "Modifying the Database Structure" task.

- Perform all recommended update statistics, so the optimizer can make a good decision.
- Look for large tables that are being altered. Create separate scripts for each of these tables and run the script concurrently with your other alter scripts. You can run these concurrently even if you are using the Alter by Rename build option because each table creation uses an independent temporary table name in the new PeopleSoft release (PSY*recname*).
- Run your create table script concurrently with the alter tables without deletes script.
- Some indexes will not create during alter without deletes because of a unique key violation. You can expect this because index structures have changed. The data in these indexes will be corrected during data conversion. You can create the index as a non-unique key for data conversion. Create this non-unique index, without the field that caused the error, so that data conversion does not have to update the index as well as the data pages as it corrects the data in this field.

Task D-2-3: Performing Data Conversion

PeopleSoft delivers the Change Assistant templates to run the steps on the client by default. The server can run Application Engine programs. You may want to run these programs on the server to increase performance. Change Assistant uses the PSEMHUB and PSEMAgent to execute jobs to the server. You will need to configure and start your Environment Management Hub and Agent, enter the Environment Management information into the Change Assistant options, set your Change Assistant mode, check the Perform Server Processing check box, and modify the run location of the steps you wish to run on the server. Consider running data conversion application engine programs concurrently as they were designed with no dependencies between programs. Any exceptions to this are noted in the documentation. If you would like to take advantage of concurrent processing, modify the step properties and set the Run Concurrently option to Yes.

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

Task D-3: Improving Performance for Your Platform

This section discusses:

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- Using Oracle
- Using DB2

Task D-3-1: Using Oracle

You should use the cost-based optimizer during the upgrade. The application engine scripts use MetaSQL to run the update statistics command at various times during data conversion. If you are running the rule-based optimizer, you will not take advantage of these statements.

When running the alter scripts, remember the Oracle hint /*APPEND*/. This command will improve the performance of your alter script if you are doing an "Alter by Rename." This hint performs like an Oracle Direct Load Insert and does not capture redo or recovery information. The syntax is as follows:

```
INSERT  /*+ APPEND */  INTO TABLENAME  (FIELD1, FIELD2, ...
```

Make sure your database administrator has turned autoextend on. Autoextend allows tablespaces to grow larger than their set maximum size and will be useful during the upgrade process since tablespaces grow several times larger than they would in production.

Alter the tablespace for PSIMAGE and increase it to 200 MB; autoextend on the next 10 MB; set the maxsize to *unlimited*.

Task D-3-2: Using DB2

Perform all recommended update statistics on the system catalog as well as the application tablespaces.

Interspersed throughout the Application Engine data conversion programs are steps that make a dynamic call for RUNSTATS to be performed against selected tables. An example of how this is used follows:

- Step01 - Start with an empty Temp_Table_TAO.
- Step02 - INSERT 60,000 rows into the Temp_Table_TAO.
- Step03 - Application Engine Step calls %UpdateStats(Temp_Table_TAO).
- Step04 - You can now perform SQL against Temp_Table_TAO using new statistics.

This will allow you to use indexes when processing against Temp_Table_TAO. If DB2 z/OS is not configured correctly, Application Engine programs skip these steps and the performance of the SQL steps that follow will suffer.

In order to take advantage of the %UpdateStats feature, at least one of these conditions must be met:

- You implemented the DSNUTILS stored procedure.
- You followed the enhanced installation path.

See the Enterprise PeopleTools Installation for DB2 UDB for z/OS for your new release.

Note. If you disable the %UpdateStats feature of Application Engine, it will adversely affect the performance of your data conversion programs, because statistics will not update when the tables are loaded with large volumes of data.

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Task D-4: Consulting the Global Support Center

If you do have a problem with your upgrade, contact the Global Support Center (GSC). PeopleSoft will be able to give you a solution to the problem faster if you supply the following information:

- Include details about the table row counts and indexes available on the tables involved in the processing:
  - Include indexes in your physical database, not those defined in Application Designer.
  - Mention any additional indexes that you custom-added; they could be getting in the way.
- Include RDBMS (Oracle, SQL Server, or DB2, and so on) and RDBMS release (for example, Oracle 7.3 or 8.16).
- If you are running on Oracle, specify whether you are you running in cost-based or rule-based mode.
- Include the PeopleSoft upgrade path for both PeopleTools and the application.
- Provide trace files: PeopleTools trace and RDBMS-specific trace files, SQL explains, and so on.

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APPENDIX E

Planning for Upgrade Testing

This appendix discusses:

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

Understanding Testing Techniques

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

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

Task E-1: Deciding When to Test

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

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Task E-2: Evaluating Your Testing Requirements

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

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

Task E-3: Defining Your Testing Strategy

This section discusses:

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

Understanding Your Testing Strategy

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

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

Task E-3-1: Evaluating Unit Testing

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

- Test individual online transactions and batch processes on the upgraded database.
- Validate data converted during the upgrade.
- Verify that you can access existing data and enter new data successfully.

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- Test customizations reapplied to the upgraded database.
- Each customization is tested individually along with all related processes.
- Business processes are not tested.
- Test scripts are not required.
- Test − Document − Resolve issues − Retest.

Task E-3-2: Evaluating System Testing

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

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

Task E-3-3: Evaluating Integration Testing

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

- Create integration test environment via a test Move to Production.
- Test specific business processes.
- Test integration between modules and business processes.
- Perform using test scripts.
- Compare expected results to actual results.
- Test − Document − Resolve issues − Retest − Document − Sign off.

Task E-3-4: Evaluating Parallel Testing

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

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

Task E-3-5: Evaluating Performance Testing

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

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

Task E-3-6: Evaluating User Acceptance Testing

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

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

Task E-3-7: Evaluating Regression Testing

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

- Ensure that no new defects have been introduced during the move.
- Execute a predefined set of scripts to confirm the test move.

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- Performed by Functional Resources before *Go Live.*
- Rerun scripts from previous testing.

Task E-4: Determining the Testing Conditions

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

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

Task E-5: Developing Your Test Plan

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

- Test procedures
- Assumptions
- Timing
- Deliverables
- Acceptance criteria
- Roles and responsibilities
- Resource requirements
- Training requirements
- Test environment
- Data requirements
- Issue and change control tracking procedures

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- Testing Tools

Task E-6: Developing Test Scripts

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

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

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

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

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

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

- Action
  - Include the script name, description, and purpose.
  - Include the navigation steps within the PeopleSoft system.
  - Include navigation steps outside the PeopleSoft system.
- Input
  - Include security requirements: what User ID, Role, and Permission List should be used to perform the test.
  - Specify key data elements: entering new or accessing existing data.
- Results
  - Include the exact results.
  - Print screens to support the results and print the report output.

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Task E-7: Reviewing Tips and Techniques

This section discusses:

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

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

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

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

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

Task E-7-2: Performing Testing on Up to Date Data

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

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

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Task E-7-3: Performing Test Move to Production

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

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

Task E-7-4: Tracking Issues

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

- Categorize issues:

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

Task E-7-5: Reviewing Testing Tools

SQA Robot :

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

Test Director by Mercury/Interactive:

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

Task E-7-6: Discussing Change Control

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

Task E-7-7: Discussing Back Up Procedures

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

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

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Task E-7-8: Evaluating Unexpected Results

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

See PeopleSoft Customer Connection (Updates + Fixes).

Task E-7-9: Evaluating Reasons for Failure

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

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

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APPENDIX F

Preserving Queries and Tree Objects

This appendix discusses:

- Understanding Preserve Queries and Trees
- Preparing the Database
- Creating a New Project
- Comparing the New Project
- Copying the Project
- Testing the Project
- ReExporting the PeopleTools Tables

Understanding Preserve 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 PeopleTools tables or objects including queries, trees, and tree structures. The freeze on PeopleTools changes is important because you will lose any changes to these objects made during an upgrade to 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.

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Task F-1: Preparing the Database

In this step, you create a new copy of your current production database, perform steps on the new copy, and run scripts against the new copy to update the release level.

To prepare the database:

1. At the beginning of the test Move to Production, you should make a new copy of your current production database. To preserve queries and trees, you need to make not only that Copy of Production but also an additional copy of your current production database. For clarity, PeopleSoft refers to this additional copy of your production database as the Tree/Query Copy of Production database. So now you should have a Copy of Production database and a Tree/Query Copy of Production database.
2. Perform the test Move to Production on your Copy of Production database.
3. To obtain the queries and trees that you want to preserve, the Tree/Query Copy of Production database needs to be at the same release level as the Copy of Production database on which you just completed the test Move to Production. To update your Tree/Query Copy of Production to the same release, you run release scripts against this database. PeopleSoft refers to this as "reling up" the database. Use the Custom Compare template to "rel up" your database. Select the Product Line *PEOPLETOOLS* when configuring your Change Assistant job.

Task F-2: Creating a New Project

Now that your Tree/Query Copy of Production is at the same release as your Copy of Production database, you create a project in the Tree/Query Copy of Production that contains all of the queries and trees that you wish to preserve.

To create a new project:

1. Using PeopleTools 8.4x, sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch 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 Application Designer.

   Note. Queries and trees do not appear in projects under the Development tab in 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 Application Designer.

6. Select Insert, Definitions into Project...
7. Select Queries from the Definition Type drop-down list box and click Insert.
8. Using your list of identified queries that need to be preserved, highlight each one of those queries from the Application Designer list.

   You can highlight more than one by holding down the Control (CTRL) key while you click the name of the query.

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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 Application Designer, you will see Queries as an object type in the project.

10. Double-click on queries under the PRESERVED project to see a listing of all of the queries to preserve in the right-hand window of Application Designer.
11. Select File, Save Project.
12. Repeat steps 6 through 11 for trees and tree structures.

    Now your PRESERVED project should contain all of the queries, trees, and tree structures that you want to preserve.

Task F-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 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. Using PeopleTools 8.4x, sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch 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 on 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.

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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 F-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. Using PeopleTools 8.4x, sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch 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 on 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 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 F-5: Testing the Project

Now that the queries, trees, and tree structures that you wanted to preserve are in the Copy of Production database, you must test and re-test and make any necessary changes if the test results are not what you expected.

Task F-6: ReExporting the PeopleTools Tables

Once you are satisfied with the test results, you must re-export the PeopleTools tables to actually preserve the queries, trees, and tree structures. During your test Move to Production, you ran MVPRDEXP.DMS to export the 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 PeopleTools tables.

To re-export the PeopleTools tables:

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1. As a PeopleSoft user, launch 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 G

Upgrading the Content Provider Registry

This appendix discusses:

- Understanding the Content Provider Registry Upgrade
- Copying Your Enterprise Portal Database
- Upgrading Enterprise Portal PeopleTools
- Updating Registry Permission Lists
- Creating the Portal Project
- Comparing the Portal Project
- Reviewing the Portal Project
- Copying the Portal Project
- Copying Portal Project to Production
- Deleting Obsolete Folders
- Updating Registry Folder Permissions

Understanding the Content Provider Registry Upgrade

You should perform this task if you use the Enterprise Portal 8.4 or higher running on PeopleTools 8.4x with the full navigation load access method. This means 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 Enterprise Portal database. PeopleSoft 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 Enterprise Portal database. This task will update the portal registry structures in your Enterprise Portal database to match what is in the Content Provider database. This is accomplished by the following:

- Upgrade the PeopleTools on a copy of the Enterprise Portal database. This allows a project compare to run between the Enterprise Portal and the Content Provider database.
- Create a portal project in the Enterprise Portal 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 Enterprise Portal database into this

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project. You will have a complete list of all registry structures for the Content Provider, including what is current and what should be deleted.

- Compare the complete list of registry structures in the Content Provider database to what exists in the Enterprise Portal, via 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 Enterprise Portal database. This deleted, updates, and adds registry structures to the Enterprise Portal database which syncs it up with what is current in the Content Provider database.

If you use Enterprise Portal 8 SP2, PeopleSoft recommends you upgrade your Enterprise Portal to the latest available release. If you do upgrade your Enterprise Portal database, you must be on PeopleTools 8.46 or higher.

Note. If you use Enterprise Portal 8.4 you *do not* need to upgrade to Enterprise Portal 8.8. You can still upgrade to PeopleTools 8.46.

Enterprise Portal 8.1x – Managing Information Architecture contains additional information on this topic.

See PeopleSoft Customer Connection (Support, Documentation, Documentation Updates, Enterprise, Portal Products, Enterprise Portal).

In this appendix, you load your new Portal Registry definitions from your Copy of Production database to a copy of your Enterprise Portal database.

Note. You must complete the tasks in the appendix for each of your separately installed Enterprise Portal databases that correspond to one of the four Portal Registry definitions: EMPLOYEE, CUSTOMER, SUPPLIER, and PARTNER. If your installed Enterprise Portal uses all the registries, then complete this task for each of the portal registries using the same copy of the single Enterprise Portal database.

In the first task of this appendix, you create a copy of your Enterprise Portal 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 Enterprise Portal database.

This document uses the term “target Enterprise Portal database” to refer to the Enterprise Portal database used in the upgrade steps. Use the table below to determine the correct copy of your Enterprise Portal database for each pass.

Upgrade Pass	Target Enterprise Portal Database
Initial pass	Copy of the Enterprise Portal database
Test Move to Production	Copy of the Enterprise Portal database
Final Move to Production	Enterprise Portal production database

Task G-1: Copying Your Enterprise Portal Database

You initially upgrade the Content Provider registry on a copy of your Enterprise Portal database, then test the results of the upgrade. During your test Move to Production, you perform this task against another Copy of the Enterprise Portal.

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Create a copy of your current Enterprise Portal production database now. Use this database as your target Enterprise Portal database.

Note. During your final Move to Production, you copy the registry definitions directly to your Enterprise Portal production database. Therefore, you do not need to execute this step during your final Move to Production.

Task G-2: Upgrading Enterprise Portal PeopleTools

During the initial upgrade pass, your Enterprise Portal database must run on the same PeopleTools release level as your Copy of Production database so that you can do the compare step. Since 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 PeopleTools on your target Enterprise Portal database is not the same as your Copy Production database release level, upgrade your PeopleTools now.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts, Release, Enterprise, PeopleTools).

Task G-3: Updating Registry Permission Lists

This section discusses:

- Understanding Registry Permission Lists Updates
- Updating Portal Registry
- Deleting the Database Cache

Understanding Registry Permission Lists 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 G-3-1: Updating 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.

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2. Select the Add a New Value tab.
3. Add a run control as follows:
   a. Enter a value for the Run Control ID. The Run Control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER).
   b. Click Add.
4. Enter a value for the Portal Name. This value must match the portal registry name 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 G-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 G-4: Creating the Portal Project

This section discusses:

- Understanding Portal Project Creation
- Creating the Target Enterprise Portal Project
- Cleaning the Target Enterprise Portal Project
- Deleting the Target Enterprise Portal Database Cache
- Copying the Target Enterprise Portal 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 Enterprise Portal database. Then you copy the project definition to the Copy of Production database, where you further modify the project.

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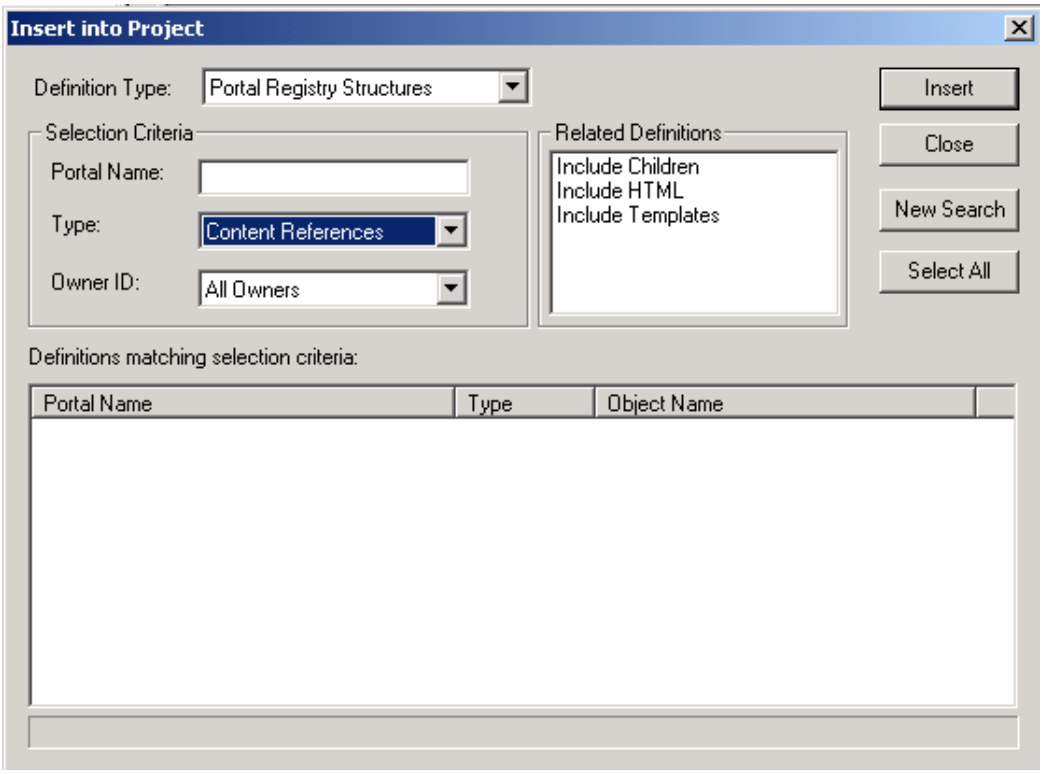
Task G-4-1: Creating the Target Enterprise Portal Project

Follow the steps below to create the target Enterprise Portal project.

To create the target Enterprise Portal project:

1. Launch Application Designer and sign on to your target Enterprise Portal database.
2. Select Insert, Definitions into Project…
3. Select the following values:
   a. For Definition Type, select *Portal Registry Structures*.
   b. Leave the Portal Name field blank.
   c. For Owner ID, select *All Owners*.
   d. Do not select any values for Related Definitions.



Insert into Project dialog box

4. Click Insert.
5. Click Select All, and the click Insert again
6. Click Close.
7. From Application Designer, select File, Save Project As….
8. Enter the project name *PORTAL_PA84X_REGISTRY*.
9. Close Application Designer.

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Task G-4-2: Cleaning the Target Enterprise Portal Project

In this step, you clean the target Enterprise Portal Project so that it contains only the existing Content Provider registry structure content references.

To clean the target Enterprise Portal project:

1. In your Enterprise Portal database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.

   Warning! Do not follow the instructions on the Clean Portal Project page. Instead, follow the instructions below.

2. Add the run control ID CLEAN_PORTAL_XXXXXXXX where XXXXXXXX represents the portal definition name: EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER for example.
3. In the Project Name field, enter the project name PORTAL_PA84X_REGISTRY.
4. Enter a value in the Portal Name field; EMPLOYEE for example.
5. Enter a value in the Content Provider Name field; CRM for example.

   Note. Before running the Clean Portal Project you must enter the Node URI text for the Message Node 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 G-4-3: Deleting the Target Enterprise Portal Database Cache

In this step, you delete the target Enterprise Portal database cache.

To delete the target Enterprise Portal database cache:

1. On your target Enterprise Portal database, launch Configuration Manager.
2. On the Startup tab, click Purge Cache Directories…
3. Select the target Enterprise Portal database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task G-4-4: Copying the Target Enterprise Portal Project Definition

In this step, you copy the target Enterprise Portal project definition to your Copy of Production database.

To copy the target Enterprise Portal project definition:

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1. Using PeopleSoft Data Mover, sign on to your target Enterprise Portal database.
2. Run the following Data Mover script:

   PS_HOME\SCRIPTS\UVUPX10E.dms

3. Close Data Mover.
4. Using PeopleSoft Data Mover, sign on to the Copy of Production database.
5. Run the following Data Mover script:

   PS_HOME\SCRIPTS\UVUPX10I.dms

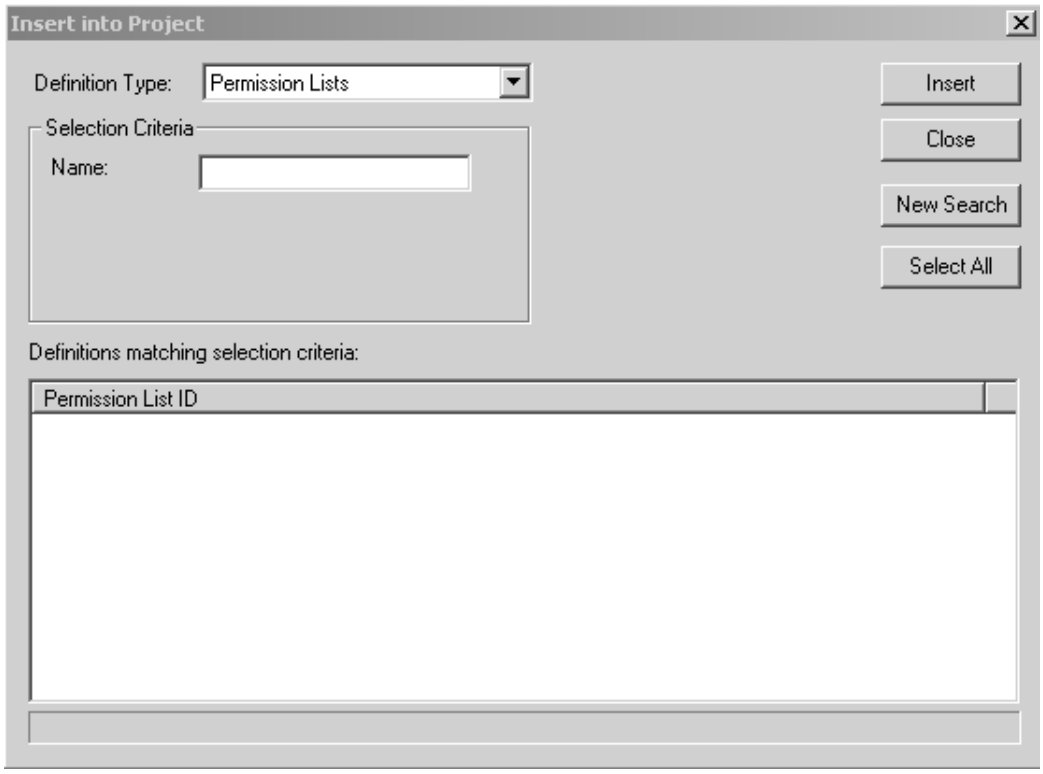
6. Close Data Mover.

Task G-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 Application Designer and sign on to your Copy of Production database.
2. Select Insert, Definitions into Project….
3. For Definition Type, select *Permission Lists*.



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:

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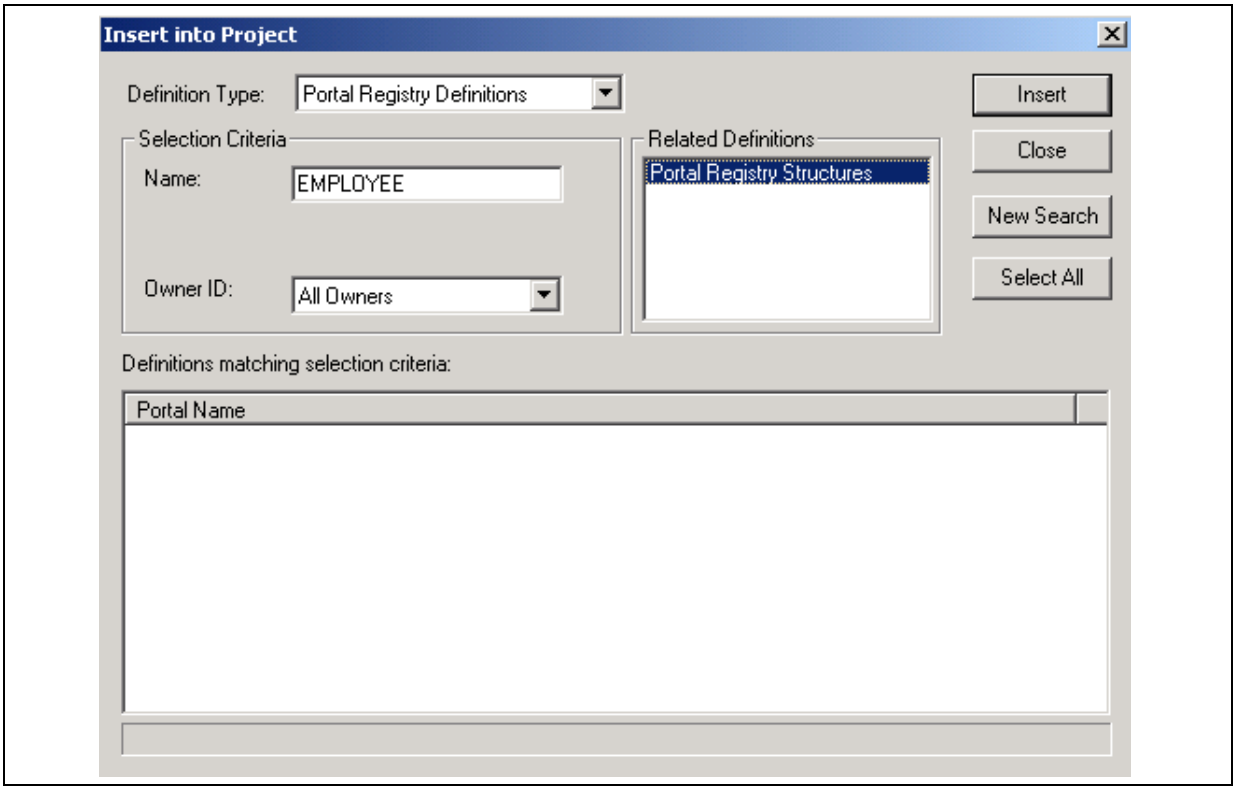
a. For Definition Type, select *Portal Registry Definitions.*

b. For Name, enter the Enterprise Portal database's default portal name (EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER).

c. For Owner ID, select *All Owners.*

d. For Related Definitions, 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 Application Designer, select File, Save Project As….
11. Enter the appropriate new project name from the table below. 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 Application Designer, select File, Merge Projects...

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14. Enter the Project Name *PORTAL_PA84X_REGISTRY.*

    This merges the objets from the PORTAL_PA84XREGISTERY project into your newly created Portal Project.

15. Select File, Save Project to save the updated Portal Project.
16. Close Application Designer.

Task G-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 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 G-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.

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7. Click OK to close Configuration Manager.

Task G-5: Comparing the Portal Project

This task only applies to the initial upgrade pass.

In this step, you compare the Portal project you created in the previous step and then review the compare results. This will allow you to adjust the portal project as necessary before copying it into the Enterprise Portal database.

To compare the Portal Project:

1. Launch Application Designer and sign on to your Copy of Production database.
2. Select Tools, Compare and Report....
3. Enter the Portal Project name 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 Enterprise Portal database, and the user ID and password.
5. Click the Options button.
6. For the Compare Type, select *Project*, and click OK.
7. Select all object types and click OK.
8. Close Application Designer.

Task G-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 * indicates that the change was not made by PeopleSoft. Review each of these objects carefully. If PeopleSoft delivered the object, the Source column of the report will read *Changed*. Note the changes 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 G-7: Copying the Portal Project

This section discusses:

- Understanding Portal Project Copying
- Copying the Portal Project

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- Deleting the Enterprise Portal Database Cache

Understanding Portal Project Copying

This task only applies to the initial upgrade pass.

In this step, you copy the project from your Copy of Production database to your target Enterprise Portal database.

Task G-7-1: Copying the Portal Project

Follow the steps below to copy the Portal Project to the Enterprise Portal 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 Enterprise Portal data.

See Creating the Portal Project, Cleaning the Copy of Production Portal Project.

To copy the Portal Project:

1. Launch Application Designer and sign on to your Copy of Production database.
2. Select File, Open...
3. For the Definition, 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 Enterprise Portal database, and the user ID and password.
7. Click Select All.
8. Click Copy.

   This may take a few minutes.
9. Close Application Designer.

Note. You do not need to create or alter any records or views.

Task G-7-2: Deleting the Enterprise Portal Database Cache

In this step, you delete the Enterprise Portal database cache.

To delete the Enterprise Portal database cache:

1. Delete the target Enterprise Portal database application server cache.
2. Stop and restart the target Enterprise Portal database web server service.

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Task G-8: Copying 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 Enterprise Portal Database Cache Again

Understanding Portal Project to Production Copying

You must perform this step during both your test and final Move to Production upgrade passes.

Task G-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 Enterprise Portal databases run on the same PeopleTools release and database platform, you can copy the project directly to the target Enterprise Portal 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 Application Designer and sign on to your Copy Production database.
2. Select File, Open....
3. For the Definition, select *Project*. 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. Select a temporary directory. Click OK.
7. Click Select All.
8. Click Copy.

   This may take a few minutes.
9. Close Application Designer.

Task G-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 Application Designer and sign on to your target Enterprise Portal database.
2. Select Tools, Copy Project, From File....
3. Browse to the Copy of Production database server's temporary directory.

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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 Enterprise Portal database server's *PS_HOME*\PROJECTS directory, and browse to that directory.

4. Select the Portal project name you just copied to file in the previous step.
5. Click Open.
6. Click Select All.
7. Set the project language options as follows:
   a. Click Options...
   b. In the Copy Options tab, select *English*, and *COMMON*.
   c. If your Enterprise Portal database is a multi-language database, then also select the languages you have installed on your Enterprise Portal 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 Application Designer.

Note. After the copy, you do not need to create or alter any records or views on the target Enterprise Portal database.

Task G-8-3: Deleting the Enterprise Portal Database Cache Again

In this step, you delete the Enterprise Portal database cache.

To delete the Enterprise Portal database cache:

1. Delete the target Enterprise Portal database's application server cache.
2. Stop and restart the target Enterprise Portal database web server service.

Task G-9: Deleting Obsolete Folders

This section discusses:

- Understanding Obsolete Folder Deletion
- Deleting Obsolete Folders on Enterprise Portal 8.4
- Deleting Obsolete Folders on Enterprise Portal 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 Enterprise Portal database that the Portal Registry Structures no longer reference. The process you run depends on your version of Enterprise Portal.

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Task G-9-1: Deleting Obsolete Folders on Enterprise Portal 8.4

Follow this procedure to delete obsolete folders on Enterprise Portal 8.4.

To delete obsolete folders on Enterprise Portal 8.4:

1. Using PeopleSoft Data Mover, sign on to your target Enterprise Portal database.
2. Run the following Data Mover script, located in the Enterprise Portal PS_HOME\SCRIPTS directory:

   `PORTAL_REG_FOLDER_DEL.DMS`

3. Close Data Mover.

Task G-9-2: Deleting Obsolete Folders on Enterprise Portal 8.8

Follow this procedure to delete obsolete folders on Enterprise Portal 8.8 or higher.

To delete obsolete folders on Enterprise Portal 8.8 or higher:

1. On your target Enterprise Portal database, navigate accordingly:
   a. For Enterprise Portal 8.8: Portal Administration, Navigation, Run Folder Cleanup.
   b. For Enterprise Portal 8.9 or higher: Portal Administration, Navigation, Delete Empty Folders.
2. Add a run control as follows:
   a. Enter a value for 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 for Portal Name. This value must match the portal registry name 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 G-10: Updating Registry Folder Permissions

This section discusses:

- Understanding Registry Folder Permissions Updates
- Updating the Enterprise Portal Registry Folder Permissions
- Deleting the Enterprise Portal Cache

Understanding Registry Folder Permissions Updates

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

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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 Enterprise Portal database cache files to propagate the changes.

Task G-10-1: Updating the Enterprise Portal Registry Folder Permissions

Follow this procedure to update your Enterprise Portal 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 Enterprise Portal folder permissions:

1. On your target Enterprise Portal database, select PeopleTools, Portal, Portal Security Sync.
2. Add a run control as follows:
   a. Enter a value for 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 for Portal Name. This value must match the portal registry name 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 G-10-2: Deleting the Enterprise Portal Cache

In this step delete the Enterprise Portal cache.

To delete the Enterprise Portal cache:

1. Delete the target Enterprise Portal database application server cache.
2. Stop and restart the target Enterprise Portal database web server service.

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APPENDIX H

Using Data Conversion Utilities

This appendix discusses:

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

Understanding Data Conversion Utilities

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

Task H-1: Using the Upgrade Driver Program

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

Task H-2: Using the Upgrade Drivers Page

This section discusses:

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

Understanding Upgrade Drivers Page

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

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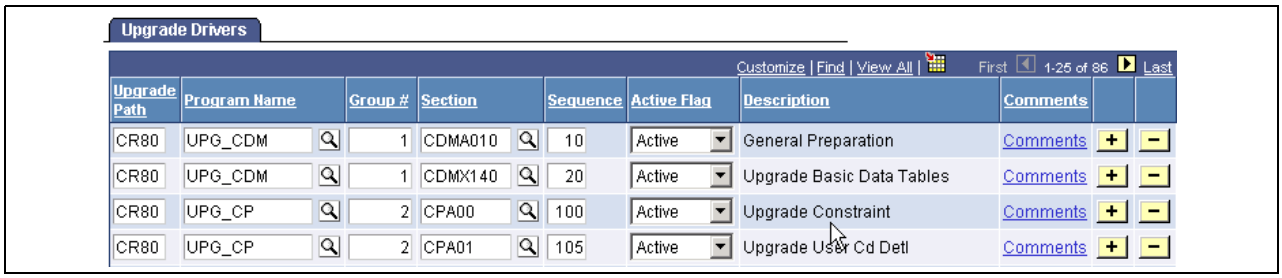
You do not have an active portal on your Copy of Production during data conversion, so you need to view and update the Data Conversion Definitions on your Demo database and then copy the updated data to your Copy of Production database.

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

To access the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Upgrade Setup, Define Upgrade Drivers.
3. Enter your upgrade path:
4. Click Search.

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



Upgrade Drivers page

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

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

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

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

To add a new section to the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Upgrade Setup, Define Upgrade Driver.

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3. Select Add a New Value.
4. Click Add.
5. Enter values for Upgrade Path and Program Name.
6. Enter a value for Group #.

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

---

7. Enter values for Section and Sequence.

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

   ```
   DLUPX03E.DMS
   ```
10. Sign on to your Copy of Production database using Data Mover and run the following script to load the updated data conversion data:

    ```
    DLUPX03I.DMS
    ```

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

Task H-2-3: Inactivating Upgrade Drivers Section

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

To inactivate a section on the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Upgrade Setup, Define Upgrade Drivers.
3. Enter your upgrade path:
4. Click Search.
5. Find the row with the Program Name and Section you want to remove and change the value of the Active Flag field to *Inactive*.
6. Click Save.
7. When you have completed all changes, sign on to your Demo database using Data Mover and run the following script to export the updated data conversion data:

   ```
   DLUPX03E.DMS
   ```
8. Sign on to your Copy of Production database using Data Mover and run the following script to load the updated data conversion data:

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```
DLUPX03I.DMS
```

Task H-3: Reviewing the Data Conversion Report

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

To run UDATACNV:

1. Using SQRW, run SQR UDATACNV on your Copy of Production database.
2. When prompted for Upgrade Path, enter:
3. When prompted for Group Number, enter the two-digit group number to report on, or enter *0* to see the comments for all groups.

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APPENDIX I

Using the Comparison Process

This appendix discusses:

- Understanding the Comparison Process
- Understanding Upgrade Compare Reports

Task I-1: Understanding the Comparison Process

This section discusses:

- Reviewing 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. PeopleSoft tracks object changes using the contents of the PSRELEASE table, and the value of two fields, LASTUPDDTTM and LASTUPDOPRID, used in the PeopleTools tables.

- 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 PeopleSoft 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, 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

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than RELEASEDTTM, the object has not changed (since the comparison release). Whether the compared object has changed or not, if it has *ever* been changed prior to the comparison release by someone other than PeopleSoft (LASTUPDOPRID <> '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 Application Designer. This is called the Application Designer Upgrade Definition window.

Task I-1-1: Reviewing 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, PeopleSoft 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, PeopleSoft 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.

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Status Type	Definition
*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.
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 I-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. You should not change these actions. You can decide whether or not to accept each action by setting the Upgrade value. Action types include:

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 I-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 PeopleSoft 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, PeopleSoft recommends that you accept the Demo database version of the object.

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Task I-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	PeopleSoft Vanilla	Keep Customizations
(Any)	Absent	COPY	YES	YES
Absent	Changed or Unchanged	DELETE	YES	YES
	Changed* or Unchanged*	DELETE	NO	NO
Changed	Changed or Unchanged	COPY	YES	YES
	Changed* or Unchanged*	COPY	YES	NO
Unchanged	Changed	COPY	NO	NO
	Unchanged	COPY	YES	YES
	Changed* or Unchanged*	COPY	YES	NO
Changed*	Changed or Unchanged	COPY	NO	YES
	Changed* or Unchanged*	COPY	YES	YES
Unchanged*	Changed or Unchanged	COPY	NO	YES
	Changed*	COPY	NO	NO
	Unchanged*	COPY	YES	YES

Task I-2: Understanding Upgrade Compare Reports

This section discusses:

- Reviewing Report Columns
- Using Reports

When you run the compare process, it creates reports to help you understand what objects differ between the Source and Target databases, and how they differ. If you have documentation of your database modifications, you should retrieve it before reviewing these reports. This will help you understand how the Target objects

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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 the following topics:

- Report columns
- Using reports

Task I-2-1: Reviewing Report Columns

For the most part, the columns in upgrade reports correspond with the columns you see in 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 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 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 PeopleTool that edits the particular object. The values in these columns correspond directly to dialog options in the tool.

Task I-2-2: Using Reports

PeopleSoft delivers several cross-reference reports that you can run to provide information about the inter-relationships between various objects. PeopleSoft delivers these reports in the form of SQRs (found in PS_HOME\SQR), Crystal Reports (found in PS_HOME\CRW\ENG), and Queries.

The cross-reference reports include:

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.

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Object Type(s)	Report Name	Report Description
Records and Panels	XRFRCPN	Lists all record definitions in alphabetical order. The report includes the menu and page definitions associated with each record definition.
Window Listing	XRFWIN	Lists all application windows in alphabetical order.

In addition to using our standard cross-reference reports, you can also generate ad hoc reports to extract the exact combination of information you need. Or, you can create permanent custom reports for information you extract on a regular basis.

PeopleSoft 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.

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