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PeopleSoft FSCM 8.8x to 9.1 Feature Pack 2 Upgrade

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Upgrade
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Contents

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

Prerequisites

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

Audience

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

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

- SQL and SQL command syntax.
- PeopleSoft system navigation.
- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

Oracle recommends that you complete training before performing an upgrade.

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

Organization

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

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

Typographical Conventions

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

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

Products

This documentation may refer to these products and product families:

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

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

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

Related Information

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

- *Release Notes.* Before you begin your upgrade, read the release notes to determine what has changed in the system and to familiarize yourself with the new features. The release notes also indicate whether you need to upgrade other portions of your system, such as your relational database management system (RDBMS) software or batch files.

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

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

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

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

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

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

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

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

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

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

CHAPTER 1

Planning Your Application Upgrade

This chapter discusses:

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

Understanding Application Upgrade Planning

You must make a copy of your production database before you start preparations for the technical portion of the upgrade. Unless otherwise noted, run these tasks on your Copy of Production database (not the New Release Demo database). In this chapter, you will also prepare your upgrade job and identify any customizations you have made to your database.

Important! You must read the documentation *Getting Started on Your PeopleSoft Upgrade* before you continue with your upgrade. This getting started guide explains the upgrade process, terminology, and setup tasks that must be performed prior to starting your upgrade.

Task 1-1: Understanding Your Upgrade

This section discusses:

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

Understanding PeopleSoft Upgrades

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

Task 1-1-1: Verifying the Software Installation

Before continuing with the upgrade, you must complete all of the tasks in *Getting Started on Your PeopleSoft Upgrade*, "Starting Your Upgrade." Verify that the following tasks are complete:

- Installing the new release.
- Applying PeopleSoft PeopleTools patches.
- Installing PeopleSoft Change Assistant.
- Making a Copy of Production Database.
- Retrieving and applying upgrade files.
- Creating and configuring an upgrade job.
- Setting the Configuration Manager profile.
- Reviewing upgrade step properties.

Properties

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

Task 1-1-2: Defining Upgrade Databases

The following databases will be used during your upgrade:

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

  It contains the new and changed database objects that you want to add. The New Release Demo database is also referred to as the Demo database later in the upgrade.
- The Copy of Production database refers to the copy of your production database, into which you will add the new and changed objects for this release from the New Release Demo database.

  Note. You will create more than one Copy of Production database. Your second and subsequent copies are referred to as the New Copy of Production.

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

Properties

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

Task 1-1-3: Increasing Database Space

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

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

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

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

Properties

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

Task 1-1-4: Reviewing Upgrade Notes and Tips

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

- Budget Cycle

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

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

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

- Performance Recommendations

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

- Expenses

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

- Period-End Close

  If you want to run period-end close prior to your upgrade, see the instructions in the PeopleSoft Financials/Supply Chain Management 9.1 PeopleBook for your product area. You can access the PeopleBook on My Oracle Support.

- Microsoft SQL Server Column Statistics

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

Properties

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

Task 1-2: Preparing Your Upgrade Job

This section discusses:

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

Task 1-2-1: Modifying the DB2 Scripts

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

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

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


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

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

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

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

```
DLEPSYSI.DMS
DLEPLASYSI.DMS
DLCGFAQ19I.DMS
DLCGGLU20I.DMS
DLCGUPY39I.DMS
DLCGUPY41I.DMS
DLUPX02I.DMS
DLUPX13I.DMS
DLUPX14I.DMS
DLUPX16I.DMS
DLUPX96I.DMS
```

If your platform is DB2 z/OS, you also need to edit the following scripts:

```
RNEPPLM01DB2.SQL
RNEPPLM02DB2.SQL
RNEPUPM01DB2.SQL
RNEPUPM02DB2.SQL
```

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

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

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

Properties

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

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

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

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

Follow the edit instructions in each script.

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

The swap scripts for your path are:

```
DLEPLASWAP.DMS
PT_RELEASE_SWAP.DMS
```

Properties

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

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

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

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

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

- Running the RNEPAUCM01 Script
- Running the RNEPEMT01 Script
- Running the RNEPGMT01 Script
- Running the RNEPLCT01 Script
- Running RNEPAUCM01 Script on Copy of Current Demo
- Running RNEPEMT01 Script on Copy of Current Demo
- Running RNEPGMT01 Script on Copy of Current Demo
- Running RNEPLCT01 Script on Copy of Current Demo
- Deleting Old Pagelet Wizard Data
- Running the RNEPPLM01MSS Script (if your platform is Microsoft)
- Running the RNEPPLM01DB2 Script (if your platform is DB2 z/OS)
- Running the RNEPPLM02DB2 Script (if your platform is DB2 z/OS)
- Running the RNEPPLM01DBX Script (if your platform is DB2 LUW)

- Running the RNEPPLM02DBX Script (if your platform is DB2 LUW)
- Running the RNEPPLM01ORA Script (if your platform is Oracle)
- Running the RNEPPLM01IFX Script (if your platform is Informix)
- Running the RNEPPLM01SYB Script (if your platform is Sybase)
- Swapping PeopleTools Tables (if your Base Language is non-English)
- Running the SQL Rename Tool for RNEPPLM01
- Running the SQL Rename Tool for RNEPPLM02 (if your platform is DB2 z/OS or DB2 LUW)
- Swapping Languages on System Data (if your Base Language is non-English)

Properties

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

Task 1-2-4: Modifying Compare Report Options

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

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

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

To modify upgrade compare options:

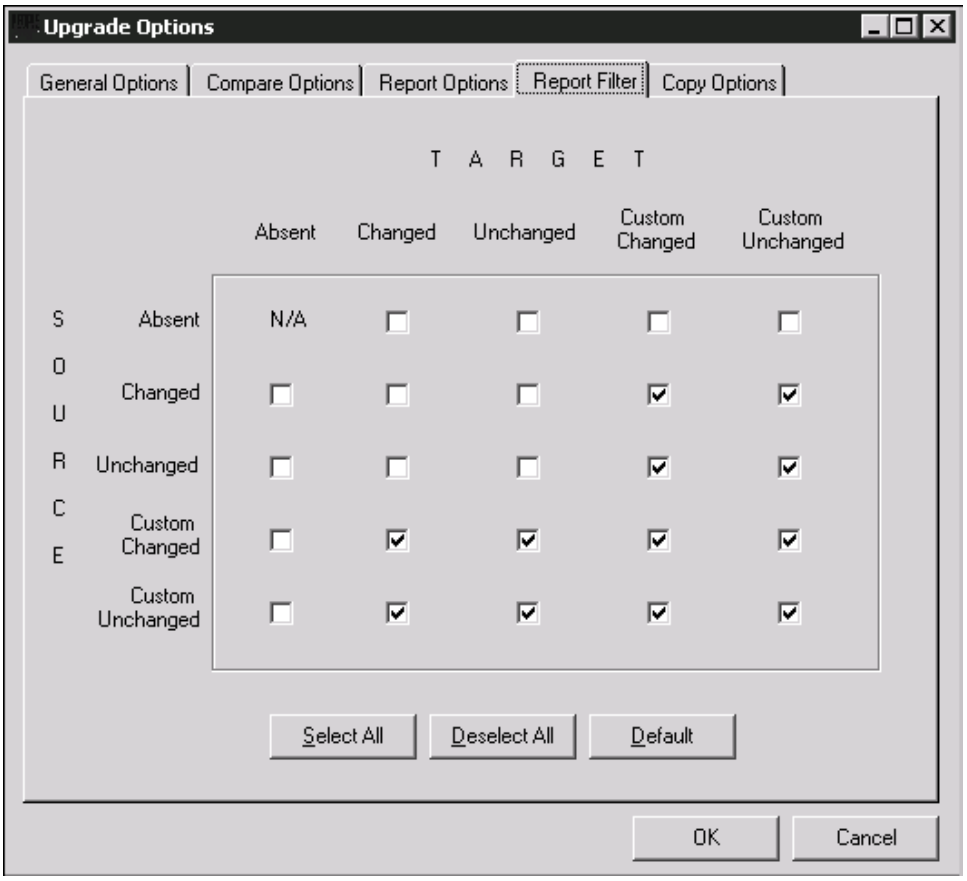
1. Highlight the “Running the UPGCUST Compare” step and right-click.
2. Select Step Properties.

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

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

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

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



Upgrade Options page, Report Filter tab

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

Properties

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

Task 1-2-5: Optimizing the Create and Alter Process

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

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

In subsequent Move to Production passes, you may choose to turn off the generation steps if possible. If you have not changed any records at the end of one Move to Production pass then you can use that SQL in your next pass. If you have done anything to change records, you need to generate the SQL scripts again. This includes changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.50 or 8.51), applying updates from My Oracle Support that involve record changes, or making additional customizations to records.

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

To modify the step properties:

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

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

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

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

Properties

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

Task 1-3: Identifying Customizations

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

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

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

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

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

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

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

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

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

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

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

```
DLEPLASYSE.DMS
DLEPLASYSI.DMS
```

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

Tables	Scripts
Mass Change	**MVAPPEXP.DMS** **MVAPPIMP.DMS**
EDI	**MVPRDEXP.DMS** **MVPRDIMP.DMS**
Strings	**MVAPPEXP.DMS** **MVAPPIMP.DMS**
Messages	**MVAPPEXP.DMS** **MVAPPIMP.DMS**

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

See Also

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

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

Properties

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

Task 1-4: Backing Up Demo Databases

This section discusses:

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

Task 1-4-1: Backing Up the Copy of Current Demo

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

Properties

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

Task 1-4-2: Backing Up the New Release Demo

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

Properties

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

CHAPTER 2

Preparing Your Database for Upgrade

This chapter discusses:

- Understanding Database Preparation
- Applying Upgrade Planning Files
- Editing Upgrade Planning DB2 Scripts
- Updating Statistics
- Running Initial Audit Reports
- Performing General Options Setup
- Defining Services Procurement Options
- Reviewing Process Scheduler Processes
- Reviewing Country Data
- Reviewing ChartField Configuration
- Preparing Commitment Control
- Preparing Promotions
- Completing Billing Tasks
- Setting Up Receivables
- Verifying Grants Management Processes
- Preparing Grants Defaults
- Setting Up Projects
- Setting Up Projects Integration
- Managing Expense Approvals
- Preparing Expenses
- Preparing Asset Management
- Managing Limits
- Processing Bill Plans
- Reviewing Burden Plans
- Processing Pending Amendments
- Executing Payables Transactions
- Completing Batch Transactions

- Preparing Inventory
- Completing Supply Chain Planning
- Preparing Strategic Sourcing
- Preparing Services Procurement
- Completing Purchasing Tasks
- Completing eProcurement Tasks
- Processing Worklist Entries and Email Notification
- Setting Up Treasury
- Reviewing Table Row Counts
- Preparing Your Database
- Renaming Records and Fields
- Comparing Customizations
- Preparing for the Application Upgrade
- Backing Up After Preparing Your Database

Understanding Database Preparation

In this chapter, you begin preparations for the upgrade. Unless otherwise noted, run these tasks on your Copy of Production database (not the New Release Demo database). These tasks do not use the new PeopleSoft release. You should use your current codeline and current PeopleSoft PeopleTools release to perform these tasks unless instructed otherwise.

Important! You must read the documentation *Getting Started on Your PeopleSoft Upgrade* before you continue with your upgrade. This getting started guide explains the upgrade process, terminology, and setup tasks that *must* be performed prior to starting your upgrade.

Task 2-1: Applying Upgrade Planning Files

This section discusses:

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

Understanding Applying Upgrade Planning Files

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

Task 2-1-1: Applying the UPGOPT Project

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

To apply the UPGOPT project:

1. Using your current codeline, launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Tools, Copy Project, From File.
3. From the dialog box, select the import directory *PS_APP_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.
6. Using your current codeline, launch PeopleSoft Data Mover and sign in to your Copy of Production database.
7. Run the following script to load Access Groups and the Upgrade Query Tree:

   `PS_APP_HOME\SCRIPTS\UPGOPT_EP88.DMS`

Properties

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

Task 2-1-2: Building the UPGOPT Project

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

To build the UPGOPT project:

1. Using your current codeline, launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select File, Open...
3. In the Definition drop-down list box, select *Project* and click Open to display the list of projects.
4. Select *UPGOPT* and click Open again.
5. Select Build, Project...
6. Under Build Options, select Create Tables, Create Views.

7. Click Settings...
8. On the Create tab, select Recreate View if it already exists and Recreate Table if it already exists.
9. On the Logging tab, select Fatal errors, warnings, and informational messages.
10. On the Scripts tab, select Output to separate files.
11. In the Script File Names box, give your scripts a unique name that reflects this task number and the object being created.
12. Click OK.
13. Under Build Execute Options, select Build script file.
14. Click Build.
15. Using the appropriate SQL query tool for your platform, run the scripts created in the previous step.

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

Properties

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

Task 2-1-3: Importing Upgrade Setup Data

This script imports previously preserved upgrade setup data and mapping values into your New Copy of Production database during the Move to Production upgrade pass. You had set up these values earlier in your Copy of Production database throughout various tasks in the "Preparing Your Database for Upgrade" chapter. You then exported this data during your Initial pass or a prior Move to Production pass.

The script name for your upgrade path is:

```
PUEP88IMP.DMS
```

Prior to running this script, please ensure that the corresponding DAT file you had exported in the Initial pass or a prior Move to Production pass exists in your current release *PS_APP_HOME* directory.

The DAT file for your upgrade path is:

```
PUEP88EXP.DAT
```

Properties

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

Task 2-1-4: Setting Up Upgrade Planning Security

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

To set up security:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.

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

Properties

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

Task 2-2: Editing Upgrade Planning DB2 Scripts

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

Note. You can find the scripts in the old release PS_APP_HOME directory.

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

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

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

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

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

```
PUUPX07.DMS
PUEPFAU41.DMS
PUEP88IMP.DMS
```


Properties

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

Task 2-3: Updating Statistics

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

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

Properties

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

Task 2-4: Running Initial Audit Reports

This section discusses:

- Understanding Running Initial Audit Reports
- Running the Initial DDDAUDIT Report
- Running the Initial SYSAUDIT Report
- Running the Initial SYSAUD01 Report
- Creating the INITALTAUD Project
- Running the Initial Alter Audit
- Reviewing the Initial Audits

Understanding Running Initial Audit Reports

In this task, you run and review your initial DDDAUDIT, SYSAUDIT, SYSAUD01, and Alter Audit reports. Running these reports ensures that your database is as clean as possible for the remainder of the upgrade.

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

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

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

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

See Reviewing the Initial Audits.

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

Properties

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

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

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

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

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

See Reviewing the Initial Audits.

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

Properties

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

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

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

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

In this step, SYSAUD01 is run using SQR from your current (old) PeopleSoft release against the Copy of Production to ensure that you are starting with a clean database.

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

See Reviewing the Initial Audits.

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

Properties

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

Task 2-4-4: Creating the INITALTAUD Project

This section discusses:

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

Understanding Creating the INITALTAUD Project

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

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

Note. If you are performing an application-only upgrade, this step is already delivered as an automated step.

Running the Step Creating the INITALTAUD Project Automatically

To run the step Creating the INITALTAUD Project automatically:

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

Creating the INITALTAUD Project

To create the INITALTAUD project:

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

8. Click Insert, and then click Close.
9. Select File, Save All.
10. Enter the project name *INITALTAUD*.

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

11. Click OK.

Properties

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

Task 2-4-5: Running the Initial Alter Audit

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

Properties

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

Task 2-4-6: Reviewing the Initial Audits

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

Review the output from the SYSAUDIT, SYSAUD01, and DDDAUDIT reports and correct any discrepancies. When application tables are deleted from PeopleSoft Application Designer, they are not automatically deleted from the system tables. Oracle takes this precaution in case you have customized information that you want to preserve. When you review your DDDAUDIT listing, these tables are listed as a discrepancy between the PeopleSoft application and the database.

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

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

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

Note. For Microsoft SQL Server and DB2 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, SYSAUDIT, and SYSAUD01 SQR scripts later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to rename the files manually after completing this task.

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

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

Properties

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

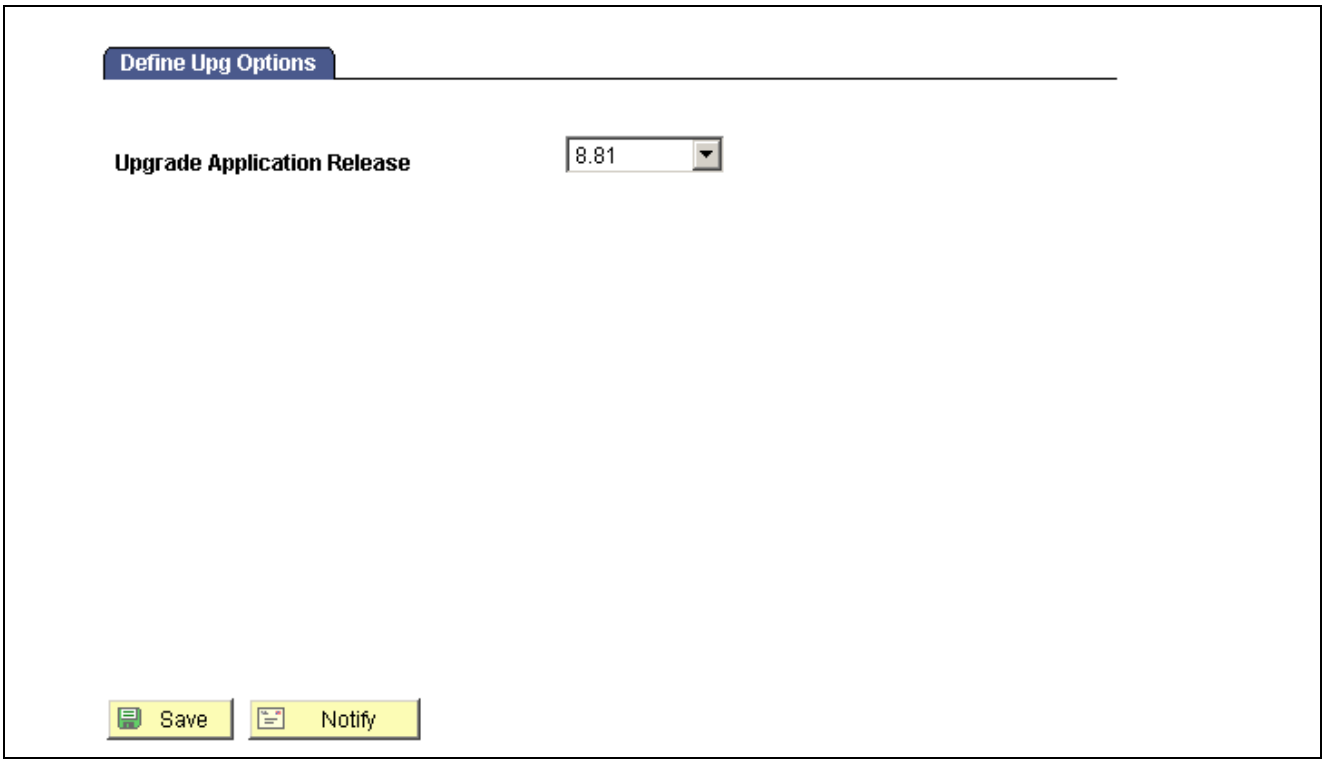
Task 2-5: Performing General Options Setup

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

To perform general options setup:

1. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Defaults.

   The Define Upg Options page appears:



Define Upgrade Options page

2. Enter the release number of your Target database in the Upgrade Application Release field.

   Some of the data conversions only run for specific target releases.

3. Click Save.

Properties

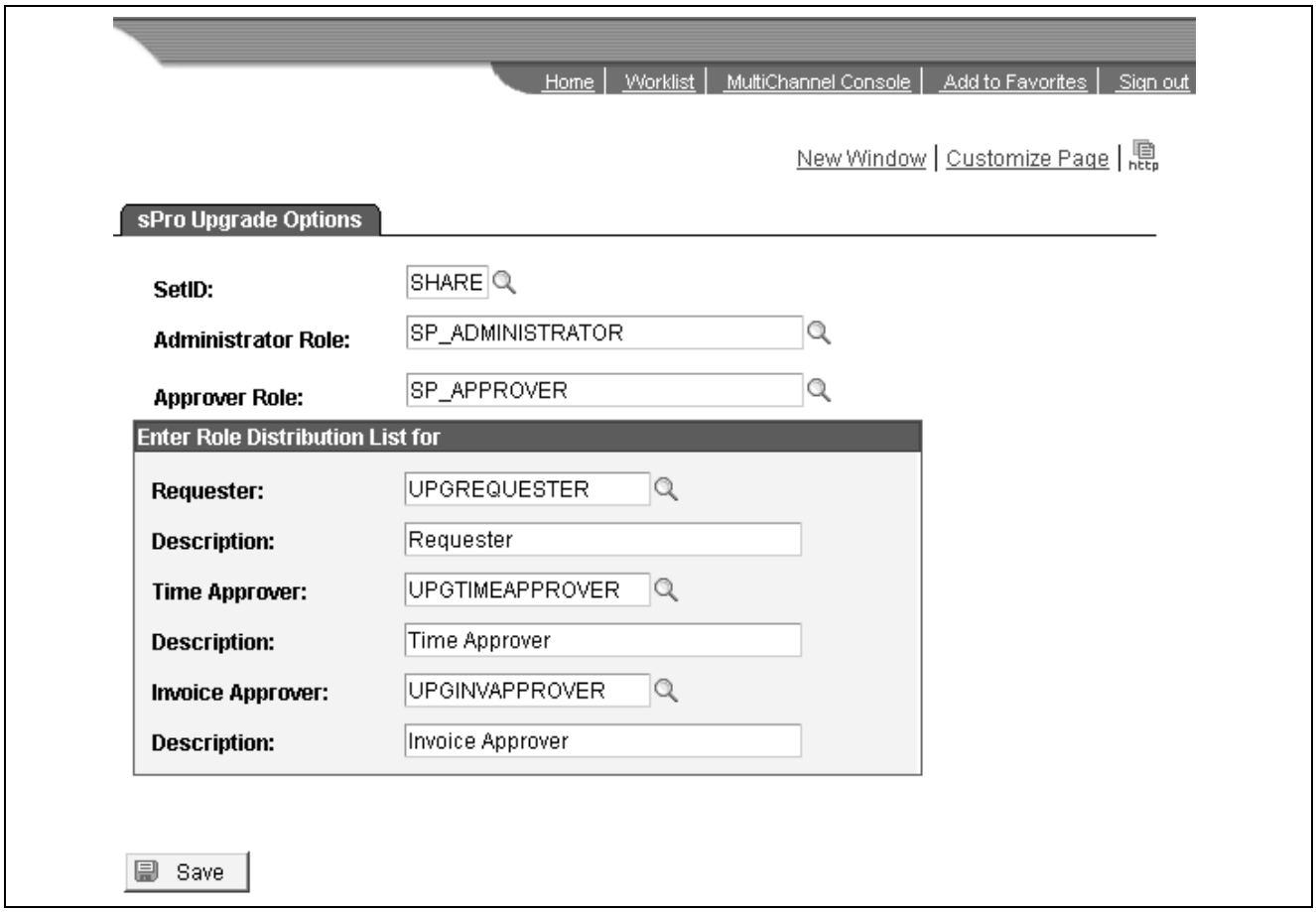
Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 2-6: Defining Services Procurement Options

To define PeopleSoft Services Procurement upgrade options:

1. Select Set Up Financials/Supply Chain, Upgrade, Define sPro Options.

   The sPro Upg Options page appears:



sPro Upg Options page

2. Enter the default setID for all of your competencies.

   Competencies can be grouped by setID in the new release.

3. Enter the role for your administrator and approver users in the corresponding fields.

   The roles will be used to update the user information during the upgrade process.

4. In the “Enter Role Distribution List for” section, enter a role distribution list name and description for the Requester, Time Approver, and Invoice Approver roles.

   For customers upgrading from PeopleSoft FSCM 8.80, the new work order alert notification feature requires that role distribution lists be created. The role distribution lists are generated based on users that are assigned to the following roles: Requester, Time Approver, and Invoice Approver. To automatically add users that are assigned to these roles to the role distribution lists, enter names for the three role distribution lists that you want to create and a description for each.

   For customers upgrading from PeopleSoft FSCM 8.8 Service Pack 1 and later, the role distribution list feature has been enhanced to incorporate work order alert notification functionality. If you are currently using role distribution lists, you can select your existing role distribution list and the upgrade process will automatically associate users that are assigned to the role of Requester, Time Approver, or Invoice Approver to the distribution list. If you do not currently use distribution lists or you do use them but want to create a new role distribution list for work order alert notifications, you can enter the role distribution list name and description for each role and the upgrade process will automatically generate them for you.

Properties

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

Task 2-7: Reviewing Process Scheduler Processes

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

To view processes from the Process Monitor:

1. Select PeopleTools, Process Scheduler, Process Monitor.
2. Enter an appropriate time limit (such as the last hour, last day, or longer limit) and click Refresh.
3. Review any processes that did not end with a Run Status of *Success* or *Cancelled*.

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

Properties

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

Task 2-8: Reviewing Country Data

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

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

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

To run the Country Table query:

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


```
UPG_ECY01
```

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

Properties

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

Task 2-9: Reviewing ChartField Configuration

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

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

To review the ChartField Configuration actions:

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

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

Properties

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

Task 2-10: Preparing Commitment Control

This section discusses:

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

Understanding Cleaning Up Commitment Control Data

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

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

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

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

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

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

Task 2-10-1: Using the Cleanup Utility

Duplicate commitment control data exists when there are multiple source header entries in the KK_SOURCE_HDR table for a document header (e.g., Requisition, PO, Voucher, and Journal). Such errors are often difficult to diagnose and resolve and can result in data integrity problems. The commitment control cleanup utility provides a convenient way to identify duplicate transactions in the commitment control tables and take corrective action. This utility is available in PeopleSoft FSCM 8.8 SP1, 8.9, and 9.0. The cleanup utility is not posted as a delivered fix so you must contact Oracle Global Customer Support to request the utility.

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

Release	Resolution
8.8 SP1	705732
8.9	683317
9.0	758002

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

The utility performs the following main steps:

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

Properties

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

Task 2-11: Preparing Promotions

This section discusses:

- Running Promotions Pre-Upgrade Reports
- Reviewing Promotions Pre-Upgrade Reports

Task 2-11-1: Running Promotions Pre-Upgrade Reports

In this task, you run reports that identify different data conditions that may exist within your PeopleSoft Promotions Management data. You will use these results and the suggested actions to adjust your data for the conversion. An explanation of the reports and directions for the output information follow these instructions.

To run the pre-upgrade reports:

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

   `Customer Specific Promotion Contact, PUEPP155.SQR`

Properties

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

Task 2-11-2: Reviewing Promotions Pre-Upgrade Reports

This section discusses:

- Reviewing Report PUEPP155

Reviewing Report PUEPP155

The contact ID field has been designated as a required field in the new PeopleSoft FSCM release. This report will identify all of the references to customer-specific promotions that do not have a contact ID associated with them. You will update the contact ID information for each customer-specific promotion listed in the report.

To update customer-specific promotions contact ID information:

1. Select Promotions, Manage Promotions, Create Customer-Specific Promo.
2. Select Find an Existing Value.

3. From the report results, enter the setID, promotion code, and customer ID information.
4. On the Promotion Details page, add a contact ID for the customer listed in the report.

   A default contact ID may be displayed when the page appears.
5. Click Save.

Note. Customer-specific promotions must have a promotion status of *Planned* in order for changes to be made.

Properties

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

Task 2-12: Completing Billing Tasks

This section discusses:

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

Task 2-12-1: Running Billing Pre-Upgrade Reports

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

To run the pre-upgrade reports:

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

```
Bills in Process, PUCGY002.SQR
Billing Interface Process, PUCGY003.SQR
```

Properties

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

Task 2-12-2: Reviewing Billing Pre-Upgrade Reports

This section discusses:

- Reviewing Report PUCGY002
- Reviewing Report PUCGY003

Reviewing Report PUCGY002

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

To restart aborted bill processes:

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

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

Reviewing Report PUCGY003

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

To restart pending bill processes:

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

Properties

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

Task 2-13: Setting Up Receivables

This section discusses:

- Posting Receivables Transactions
- Processing Credit Card Payments

- Generating Customer Conversation Letters
- Establishing Customer Conversation Currency
- Reviewing Project Data in Receivables
- Reviewing Rate Type Defaults
- Reviewing Group Type Field Data

Task 2-13-1: Posting Receivables Transactions

Before beginning the data conversion for Oracle's PeopleSoft Receivables, all electronic payments (Lockbox, EDI) must be successfully processed by the AR Payment Interface. You must delete any unmatched Item or Customer remittance by selecting Accounts Receivable, Payments, Electronic Payments, Delete Remittance.

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

To post receivables transactions:

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

Properties

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

Task 2-13-2: Processing Credit Card Payments

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

To process credit card payments:

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

5. Run the process AR_CRCARD.

Properties

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

Task 2-13-3: Generating Customer Conversation Letters

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

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

See "Completing Database Changes," Completing Receivables Changes.

To run customer follow-up letters:

1. Select Accounts Receivable, Customer Interactions, Customer Follow Up Letter.
2. Select the customer setID.
3. Select the customer ID.
4. Run PSJob FOLLOWUP.

Properties

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

Task 2-13-4: Establishing Customer Conversation Currency

In the new PeopleSoft FSCM release, each customer conversation allows for a currency code to be established. Because customers are not required to have a default currency code, you can set up a default currency code for all customers that have conversations.

To set the default currency code:

1. Select Set Up Financials/Supply Chain, Upgrade, Define Conversation Currency.

   The AR Customer Conversations page appears.
2. Select the currency code from the list of currencies.
3. Click Save.
4. Select the Upgrade Existing Currency Code on Existing Conversations check box to set up a default currency for all customer conversations.

   Note. If you do not want to set up a default currency for existing customer conversations, do *not* select this box, and skip the rest of this task.

Properties

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

Task 2-13-5: Reviewing Project Data in Receivables

In the new PeopleSoft FSCM release, the following fields will be moved from PENDING_ITEM to PENDING_DST and from the ITEM table to the ITEM_DST record:

- BUSINESS_UNIT_PC
- PROJECT_ID
- ACTIVITY_ID

Any values in these fields on the ITEM table will not be carried forward into the new PeopleSoft FSCM release. However, if these values came from PeopleSoft Billing, you will still be able to view them using the PeopleSoft Billing inquiry. The query provided will list item lines from the ITEM table that contain values for these fields. After the upgrade, the item lines listed in the query will not have the field values populated.

To run the ITEM query:

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

   ```
   UPG_ARP10
   ```

Properties

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

Task 2-13-6: Reviewing Rate Type Defaults

A new rate type defaulting hierarchy has been implemented in PeopleSoft Receivables in the new PeopleSoft FSCM release. The upgrade will not attempt to change existing rate types used in the creation of secondary ledger accounting entries. The new hierarchy will retrieve the rate type from the ledger group first. If that rate type does not exist, the rate type on the transaction will be used. If there is no rate type on the transaction, the default rate type on the ledger group will be used.

Properties

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

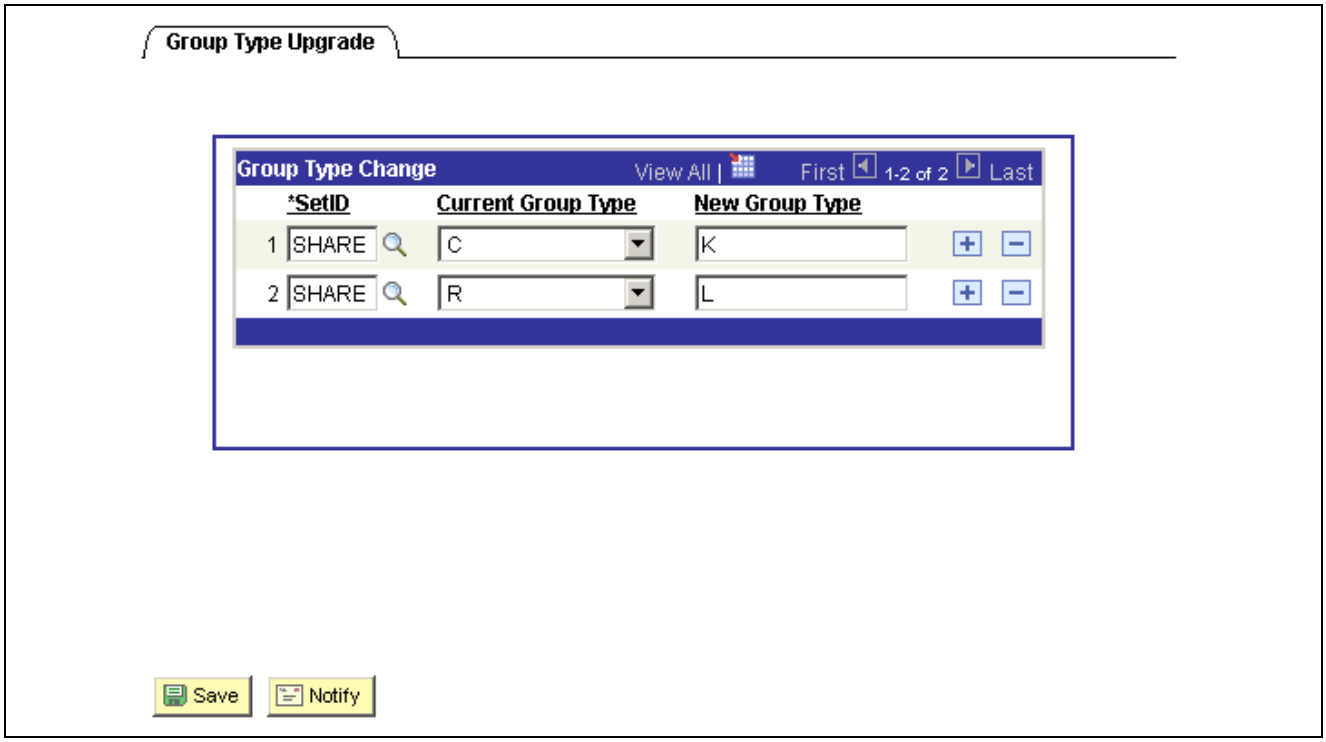
Task 2-13-7: Reviewing Group Type Field Data

In the new PeopleSoft FSCM release, group type values *C* and *R* are reserved types. If the user-defined group types C or R exist, they will be replaced with the new value specified in the UPG_GROUP_TYPE_TBL page. After the upgrade, you can no longer use reserved group types C and R as user-defined group types.

To set the value for the group type:

1. Select Set Up Financials/Supply Chain, Upgrade, Group Type Upgrade.

   The Group Type Upgrade page appears:



Group Type Upgrade page

2. Enter a setID.
3. Select *C* from the Current Group Type drop-down list.
4. In the New Group Type field, enter the new user-defined group type value that you want to replace the current group type *C*.
5. Repeat steps 2 through 4 to replace the current group type *R* with a new group type value.
6. Click Save.

Properties

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

Task 2-14: Verifying Grants Management Processes

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

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

To verify the completion of the Grants Management processes:

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

   ```
   UPG_GFGMF02
   ```

7. Verify that no rows are returned.

Properties

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

Task 2-15: Preparing Grants Defaults

In the new PeopleSoft FSCM release, PeopleSoft Grants introduces new functionality that identifies, at the business unit level, the setup level of various components of the Pre Award. By setting these defaults prior to running the upgrade, the following fields are populated with the defaults:

- GM_BU_AWD_SETUP.GM_CERT_LVL
- GM_BU_AWD_SETUP.GM_COMP_LVL
- GM_BU_AWD_SETUP.GM_DEPT_CR_LVL
- GM_BU_AWD_SETUP.GM_PROF_CR_LVL
- GM_BU_AWD_SETUP.GM_RSRC_LVL
- GM_BU_AWD_SETUP.GM_VNDR_LVL

For proposals that are not generated, the values from the setup page will be used to populate the following fields on the GM_PROPOSAL record:

- GM_PROPOSAL.GM_CERT_LVL
- GM_PROPOSAL.GM_COMP_LVL

- GM_PROPOSAL.GM_DEPT_CR_LVL
- GM_PROPOSAL.GM_PROF_CR_LVL
- GM_PROPOSAL.GM_RSRC_LVL
- GM_PROPOSAL.GM_VNDR_LVL

To set up the PeopleSoft Grants defaults:

1. Select Set Up Financials/Supply Chain, Upgrade, Define Grants Upgrade Defaults.
2. On the Search page, select the business unit and enter the page.
3. Click Search.
4. Select the PeopleSoft Grants defaults.
5. Click Save.

Properties

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

Task 2-16: Setting Up Projects

This section discusses:

- Processing Accounts Payable Voucher
- Processing Third-Party Transactions

Task 2-16-1: Processing Accounts Payable Voucher

Due to changes to the PeopleSoft Accounts Payable Voucher Accounting Line Table in the new PeopleSoft FSCM release, you need to process all vouchers that are ready to be distributed to Projects before you begin the upgrade process if you utilize the Accounts Payable to Projects Integration application engine (PC_AP_TO_PC).

To process accounts payable vouchers:

1. Select Project Costing, Cost Collection, Payables.
2. Run the AP to PC Interface process.

Properties

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

Task 2-16-2: Processing Third-Party Transactions

This section discusses:

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

Understanding Third-Party Transactions

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

Processing Third-Party Transactions

To process third-party transactions:

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

Processing Third-Party Projects and Activities

To load third-party projects and activities:

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

Properties

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

Task 2-17: Setting Up Projects Integration

This section discusses:

- Running Pending Assets into AM Integration

Task 2-17-1: Running Pending Assets into AM Integration

Due to enhancements to the PeopleSoft Projects to PeopleSoft Asset Management (AM) integration processes, pending asset transactions cannot be upgraded. An example of pending asset transactions would be assets that have been summarized but have not yet been sent to PeopleSoft Asset Management.

Furthermore, there cannot be any transactions that are summarized by profile that have been assigned an asset ID using the Assign Resources to Assets functionality, but that have not yet been run through the Summarize by Asset process. You need to process these pending Summarized by Profile transactions, processing Summarize by Asset rows to completion as well.

Follow the procedure below to ensure that there are no asset transactions pending at this point in the upgrade.

To run pending assets into AM Integration:

1. Select Project Costing, Assets, Send to Asset Management to run all pending assets into PeopleSoft Asset Management.

   Note. You must run this process twice; once using the summarize type *By Profile*, and a second time using the summarize type *By Asset*.

2. Select Asset Management, Send/Receive Information, Load Transactions, Load Transactions into AM to run the Asset Management Transaction Loader.
3. Enter a request ID.
4. Set the process frequency to *Once.*
5. Click Search to display the list of pending transactions.
6. Set the Interface ID field to the first interface ID from the search list.
7. Set the To Interface ID field to the last interface ID from the search list.
8. Run the Transaction Loader process.
9. Select Reporting Tools, Query, Query Manager and run the following query to display any summarized assets that have not been distributed to PeopleSoft Asset Management:

   `UPG_PCY05`

   This query should return zero rows.

Note. The upgrade will not delete any offset rows with an analysis type of *CLS* or *PCL* from the database. These obsolete rows will remain, even though they will no longer be referenced by the system.

Properties

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

Task 2-18: Managing Expense Approvals

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

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

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

Properties

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

Task 2-19: Preparing Expenses

This section discusses:

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

Task 2-19-1: Running the Pre-Upgrade Expenses Queries

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

To run the re-upgrade queries:

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

Properties

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

Task 2-19-2: Reviewing the Pre-Upgrade Expenses Queries

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

In previous releases, Accounting Display was a setup option at either the Business Unit or the Expenses Role level. The options for setup were Update, Display Only, or Hide. This option referred to all accounting, whether it was the default accounting setup at the Expense transaction, or GL chartfields or PC chartfields at the line level of the transaction. In PeopleSoft FSCM 9.1, this functionality is expanded so that you can separate the types of accounting to which the user has access. You will need to review the results of the UPG_EXZ01 and UPG_EXZ02 queries in order to decide how to set up the new Employee Privilege templates later in the upgrade in the chapter "Completing Database Changes," Completing Expenses Setup task.

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

Properties

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

Task 2-20: Preparing Asset Management

This section discusses:

- Running Asset Management Interface Programs

Task 2-20-1: Running Asset Management Interface Programs

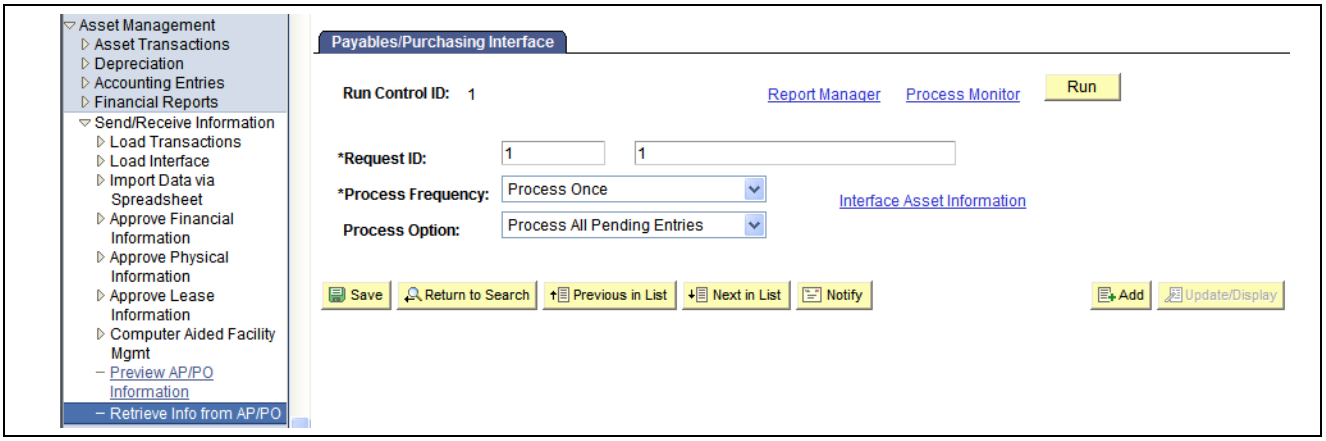
All pending interface transactions need to be loaded into Oracle's PeopleSoft Asset Management before upgrading. You must run the following two AM interface programs:

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

To run the AM interface programs:

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

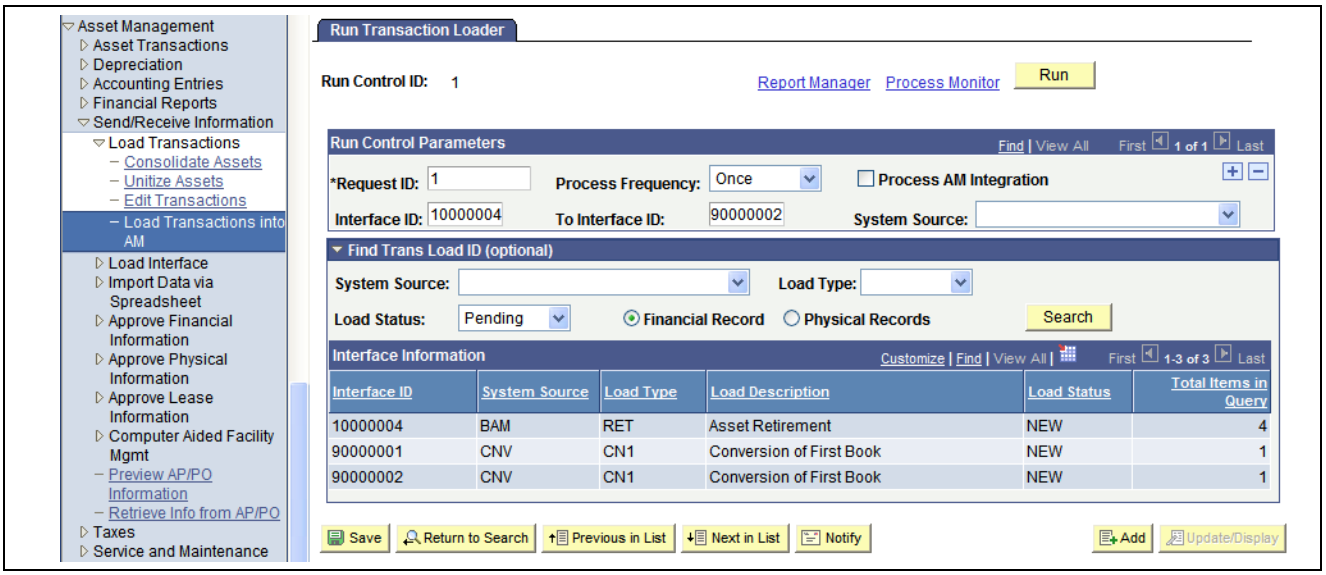
   The Payables/Purchasing Interface page appears:



Payables/Purchasing Interface page

3. Enter a request ID.
4. Set the process frequency to *Process Once*.
5. Set the process option to *Process All Pending Entries.*
6. Click the Run button to run the AMPS1000 program.
7. Select Asset Management, Send/Receive Information, Load Transactions, Load Transactions into AM.
8. Add a new Run Control ID.

   The Run Transaction Loader page appears:



Run Transaction Loader page

9. Enter a request ID.
10. Set the process frequency to *Once*.
11. Set the Interface ID field to the first interface ID from the search list.

12. Set the To Interface ID field to the last interface ID from the search list.
13. Click the Run button to run the AMIF1000 program.

Properties

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

Task 2-21: Managing Limits

This section discusses:

- Understanding Limit Management
- Reviewing Existing Limits
- Managing Limits in the New Release

Understanding Limit Management

In this task, you review the limits that have been specified for contract lines and verify how the Limit Override option has been set. You will then use this information to plan how you need to update your limits in the new PeopleSoft FSCM release.

Note. In the new PeopleSoft FSCM release, the Limit Override option (INCLUDE_OLT) has been removed from the contract detail line (CA_DETAIL).

Task 2-21-1: Reviewing Existing Limits

In earlier PeopleSoft FSCM releases, the Limit Override option resided on the contract detail line. When this option was selected, the previously defined limit was deleted and all transactions associated with that contract line was then billed, regardless of whether they had previously been over the limit.

In the new PeopleSoft FSCM release this option has been removed, and instead you will be able to release individual transactions for billing and booking of revenue.

To review any existing contract lines for which a limit is specified:

1. Select Customer Contracts, Reports, Limit Amount.
2. Run the Limit Amount report to verify the limit amounts that have been defined for each contract line.
3. If the limit amount on the contract line is greater than zero, in which case the Limit Override option will be set to *N*, a row corresponding to the contract detail line will be inserted into the new Contracts Limit and Fee Detail table.

Note. To understand billing for transactions that are over the limit, read about the new Review and Manage Limits component and the manual release of specific excess transactions feature in *PeopleSoft Contracts 9.1 PeopleBook*.

Properties

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

Task 2-21-2: Managing Limits in the New Release

Create a plan for allowing transactions that are over the specified limit to be billed in the new release. You will use this plan after the conversion to perform the following:

- Determine whether there are any additional contract lines for which you want all applicable transactions to pass limit checking. If so, you should either set the limit amount sufficiently high to allow that, or set the limit amount to zero to indicate that there is no limit, since there will no longer be a way to simply release all excess transactions.
- For contract lines for which there are transactions that are over the limit, determine whether there are any specific transactions that should be released for billing.

Note. The option to write off over the limit (OLT) transactions is no longer needed. The OLT transactions will not have been billed to customers or recognized as revenue, so there is nothing to reverse as part of the write-off processing. This allows you to keep the OLT history. If the limit were increased, the excess transactions could then pass limit checking and be billed and recognized as revenue.

Properties

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

Task 2-22: Processing Bill Plans

This section discusses:

- Understanding Processing Bill Plans
- Running the Summarized Bill Plans Query
- Processing Ready Bill Plans
- Processing Pending Bill Plans
- Processing In Progress Bill Plans

Understanding Processing Bill Plans

For all bill plans with a status of *In Progress*, *Ready*, or *Pending* that have summarized bill plan lines and are attached to amount-based contract lines, you need to delete the summarized bill plan lines and replace them with individual bill plan lines.

Note. If you do not have any bill plans with summarized bill plan lines attached to amount-based contract lines, you can skip this step.

You will need to complete the following tasks to process bill plans:

1. Run a query to find the bill plans from which you need to delete summarized bill plan lines.
2. Delete summarized bill plan lines from all bill plans with the status *Ready* that are attached to amount-based contract lines and then create individual bill plan lines.
3. Delete summarized bill plan lines from all bill plans with the status *Pending* that are attached to amount-based contract lines and then create individual bill plan lines.
4. For bill plans with the status *In Progress*, you can either fully process the bill plans to a status of *Complete*, or you can reverse the bill plans. For the bill plans that are reversed, unassign the bill plans from the amount-based contract lines. Then create new bill plans and assign them to the amount-based contract lines.

Note. Keep track of all contract lines that were assigned to summarized bill plan lines, because as part of the post-upgrade process you will add summarization information to those attached bill plans.

Task 2-22-1: Running the Summarized Bill Plans Query

To run the summarized bill plans query:

1. Select Reporting Tools, Query, Query Viewer.
2. Search for the query UPG_CAP02 and click the Run to HTML link in the result set.
3. Save the results of the query.

   This is the list of bill plans from which you will need to delete summarized bill plan lines.

Properties

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

Task 2-22-2: Processing Ready Bill Plans

For bill plans with the status *Ready* that have summarized bill plan lines and are attached to amount-based contract lines, delete the summarized bill plan lines and replace them with individual bill plan lines.

To process bill plans with the status *Ready*:

1. Select Customer Contracts, Review Billing, Plans.
2. Enter values in the Business Unit, Contract Number, and Bill Plan ID fields from the results of the query UPG_CAP02 that you ran in the previous task.

   Note. In the query results, bill plans that are *ready* have the billing status *RDY*.

3. Click the Bill Plan ID link in the result set.
4. Set the Billing Status field to *Pending*.

5. Select the Billing Plan Lines tab.
6. Click the Delete Lines button.
7. Select all contract lines located in the Contract Lines Not Associated with Billing Plan Lines grid.
8. In the Billing Plan Line Creation Opt section, select the Create individual lines option.
9. Click the Create Lines button.
10. Click Save.

Properties

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

Task 2-22-3: Processing Pending Bill Plans

For bill plans with the status *Pending* that have summarized bill plan lines and are attached to amount-based contract lines, delete the summarized bill plan lines and replace them with individual bill plan lines.

To process bill plans with the status *Pending*:

1. Select Customer Contracts, Review Billing, Plans.
2. Enter values in the Business Unit, Contract Number, and Bill Plan ID fields from the results of query UPG_CAP02.

   Note. In the query results, bill plans that are *pending* have the billing status *PND*.

3. Click the Bill Plan ID link in the result set.
4. Select the Billing Plan Lines tab.
5. Click the Delete Lines button.
6. Select all contract lines located in the Contract Lines Not Associated with Billing Plan Lines grid.
7. In the Billing Plan Line Creation Opt section, select the Create individual lines option.
8. Click the Create Lines button.
9. Click Save.

Properties

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

Task 2-22-4: Processing In Progress Bill Plans

This section discusses:

- Understanding Processing In Progress Bill Plans

- Processing Bill Plans to Completion
- Reversing the Bill Plans

Understanding Processing In Progress Bill Plans

In this step, you process bill plans with the status *In Progress* that have summarized bill plan lines and are attached to amount-based contract lines.

Note. In the UPG_CAP02 query results, bill plans that are *in progress* have the billing status *PRG*.

You can process bill plans with the status *In Progress* using either of the following options:

- Fully process the bill plan to a status of *Complete*.
- Reverse the bill plan.

Processing Bill Plans to Completion

To process bill plans to a status of *Complete*:

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

   The Billing Interface page appears.
2. Make sure the Billing Interface program has been run so that all bill lines in the interface table are on invoices.
3. Select Billing, Generate Invoices, Non-Consolidated, Finalize and Print Invoices.

   The Finalize and Print page appears.
4. Run the Finalize and Print process for those bills.
5. Select Billing, Generate Invoices, Utilities, Update Contract/Projects Data.

   The Project/Contracts Intrfc page appears.
6. Run the Projects/Contracts Intrfc program to update contracts.
7. Select Customer Contracts, Schedule and Process Billing, Process Other Billing Methods.
8. Run the Contracts/Billing Interface process to update the bill plan and event statuses.

Reversing the Bill Plans

To reverse bill plans in PeopleSoft Contracts:

1. Select Customer Contracts, Review Billing, Plans.
2. Set the bill plans to *Reversal In Progress*.
3. Select Customer Contracts, Schedule and Process Billing, Process Billing.
4. Run the Contracts/Billing Interface process to send the updated bill plan statuses to Billing.
5. Select Billing, Interface Transactions, Process Billing Interface, Billing Interface.
6. Make sure the Billing Interface program has been run so that all bill lines in the interface table are on invoices.
7. Select Billing, Generate Invoices, Non-Consolidated, Finalize and Print Invoices .

   The Finalize and Print page appears.
8. Run the Finalize and Print process for those bills.

9. Select Billing, Generate Invoices, Utilities, Update Contract/Projects Data.

   The Run BI PC/CA Intrfc page appears.
10. Run the Projects/Contracts Intrfc program to update contracts.
11. After the bills have been fully reversed, go to the bill plans and unassign and reassign them as follows:
    a. Select Customer Contracts, Schedule and Process Billing, Assign Bill Plan.
    b. To unassign the bill plans, select the contract lines you want to unassign and click the Unassign button.

       If the bills have not been fully reversed for the bill plan, you will receive an error message.
    c. To reassign the contract lines to a new bill plan, select the contract lines and then click the Assign button.
    d. In the bill plan, select the Billing Plan Lines tab.
    e. Select all contract lines located in the Contract Lines Not Associated with Billing Plan Lines grid.
    f. In the Billing Plan Line Creation Opt section, select the Create individual lines option.
    g. Click the Create Lines button.
    h. Click Save.

Properties

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

Task 2-23: Reviewing Burden Plans

In the new PeopleSoft FSCM release, all burden plans will be converted into rate plans. Additionally, if prior to upgrade there was a Contract Line level rate template and a burden plan at the activity, project, PeopleSoft Contracts (CA) header, or PeopleSoft Project Costing business unit level, then the rate template will be combined with the burden plan (selected from the most specific level defined) to create a new rate plan. This new rate plan, a product of the rate template and burden plan, will be used for pricing transactions after the upgrade.

However, the CA header burden plan will not be combined with the rate template to create a new rate plan when all of the following conditions exist concurrently:

- A burden plan has been defined at the CA header.
- Neither the activity nor the project has a burden plan.
- There is a rate template on the contract line.
- The business unit for the contract is not the same as the PeopleSoft Project Costing business unit defined for the contract line.

To identify the contract lines:

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

UPG_CAP01

Properties

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

Task 2-24: Processing Pending Amendments

This section discusses:

- Understanding Pending Amendments
- Running the Outstanding Amendments Query
- Cancelling an Amendment
- Processing an Amendment to Complete

Understanding Pending Amendments

All contract amendments with a status of *Ready* or *Pending* that have changes to the limit amount or the addition of a new contract line need to be processed to a status of *Complete* or *Cancelled*. You must first run a query to obtain a list of outstanding amendments that need to be processed and then process them to a status of *Complete* or *Cancelled*.

Task 2-24-1: Running the Outstanding Amendments Query

To run a query on outstanding amendments:

1. Select Reporting Tools, Query, Query Viewer.
2. Search for the query UPG_CAP03 and click the Run to HTML link in the result set.
3. Save the results of the query.

   This is the list of outstanding amendments that need to be processed.

Properties

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

Task 2-24-2: Cancelling an Amendment

To cancel an amendment:

1. Select Customer Contracts, Create and Amend, General Information.
2. Specify the contract that you want to update.

3. Select the Amendments tab.
4. In the Amendments grid, click the Detail link for an amendment with a status of *Ready* or *Pending*.
5. On the Amendment Detail page, set the Amend Status field to *Cancelled*.
6. Click Save.

Properties

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

Task 2-24-3: Processing an Amendment to Complete

To process an amendment to a status of *Complete*:

1. Select Customer Contracts, Create and Amend, General Information.
2. Specify the contract that you want to update.
3. Click the Amendments tab.
4. In the Amendments grid, click the Detail link for an amendment with a status of *Ready* or *Pending*.
5. On the Amendment Detail page, set the Amend Status field to *Ready*.

   When you change the status to *Ready*, the Process Amendment button appears above the Amend Status field.
6. Click the Process Amendment button to process the amendment.

Properties

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

Task 2-25: Executing Payables Transactions

This section discusses:

- Documenting New Match Rules
- Reviewing Rejected Vouchers
- Documenting New Receipt Aware Criteria
- Customizing Pay Cycle Definition
- Closing Payables Pay Cycles
- Posting Payables Transactions
- Running Journal Generator Edit and Post

- Cancelling Rescheduled Payments
- Flagging Bad Effective Dated Withholding Entities

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

Task 2-25-1: Documenting New Match Rules

After you complete the upgrade, you will be instructed to add the new rules back into the system and reapply your customizations to the delivered rules. At the end of the upgrade, you will enter the documented rules to the specific match controls if they are still applicable to your business case. It is important that you document all the new match rules that you added and any delivered rules that you modified for input later in the upgrade.

See "Completing Database Changes," Performing Payables Setup.

To document new match rules:

1. To determine which match rules you are using for each match control rule, select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rule Control.
2. To see the detail behind those rules, to determine which rules you have added or customized, select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rules.

Properties

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

Task 2-25-2: Reviewing Rejected Vouchers

You need to review and clean up any vouches that have a match status of "Reject". If these are not taken care of before the upgrade, they will be converted to "To Be Matched" and the new match process will process them.

To review which vouchers have the "Reject" match status:

1. Select Reporting Tools, Query, Query Manager.
2. Run query *UPG_APM02*.

Properties

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

Task 2-25-3: Documenting New Receipt Aware Criteria

After you complete the upgrade, you will be instructed to add the new receipt aware criteria back into the system and reapply your customizations to the newly delivered document association rules. At the end of the upgrade, you will enter the documented receipt aware criteria to create a new document association, if they are still applicable to your business case. It is important that you document all the new receipt aware criteria that you added and any delivered receipt aware criteria (RECEIPT and STANDARD) that you modified, for input later in the upgrade.

To document new receipt aware criteria:

1. To determine which receipt aware criteria you might have added, select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Receipt Aware Criteria.
2. Make a note of the new receipt aware criteria that you added or customized from this page.

Properties

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

Task 2-25-4: Customizing Pay Cycle Definition

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

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

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

See Also

PeopleSoft Payables 9.1 PeopleBook

Properties

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

Task 2-25-5: Closing Payables Pay Cycles

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

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

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

   `UPG_APY01`

Properties

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

Task 2-25-6: Posting Payables Transactions

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

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

To post Payables transactions:

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

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

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

Properties

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

Task 2-25-7: Running Journal Generator Edit and Post

Make sure that the Post Payables Transactions section above is completed before proceeding with this task.

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

To run journal generator, edit, and post:

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

Properties

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

Task 2-25-8: Cancelling Rescheduled Payments

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

To cancel any rescheduled payments:

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

Properties

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

Task 2-25-9: Flagging Bad Effective Dated Withholding Entities

In this step, you run a query to identify withholding entities with incorrect effective date information. Because of the new withholding enhancements, the withholding entity and class information on the Procurement Control ChartField page are driven by the information defined on the Withholding Entity page. The effective date on the old page must be greater than or equal to the effective date on the new page, or the automatic data conversion will not work correctly. Use this report to make any necessary changes to your withholding entities.

To run the Withholding Entities report:

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

```
UPG_APU30
```


Properties

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

Task 2-26: Completing Batch Transactions

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

To complete or cancel BCT transactions:

1. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
2. Run the report Outstanding Batch Transactions, PUCGY257, to retrieve a list of business units with transactions that have not been closed or cancelled.
3. Select Data Exchanges, Transaction Error Handling, Maintain Transactions.
4. For every business unit listed in the Outstanding Batch Transactions report:
   a. Click the Search button (flashlight).
   b. For each entry that does not have the status *Complete*, click the EIP Control ID and either complete or cancel the transaction.
5. If any rows are returned, you must repeat steps 3 and 4 for every applicable business unit.

Properties

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

Task 2-27: Preparing Inventory

This section discusses:

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

Task 2-27-1: Confirming Shipping and Depleting All Orders

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

To confirm, ship, and deplete orders:

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

Properties

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

Task 2-27-2: Costing and Posting Inventory Transactions

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

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

To cost and post Inventory transactions:

1. If you do not have the Coalesced codeline, perform the following steps:
   a. Run the transaction costing process by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Inventory Transaction Costing.
   b. Run accounting line creation by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Accounting Line Creation.
2. If you have the Coalesced codeline, perform the following steps:
   a. Run both the transaction costing and accounting line creation processes by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Cost Accounting Creation.
   b. Select the options Cost Inventory Transactions and Creating Accounting Lines for all transaction groups.
3. Select Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Accounting Line Errors.
4. Verify that there are no errors for any PeopleSoft Inventory business unit.

5. Run journal generator by selecting General Ledger, Journals, Subsystem Journals, Generate Journals.
6. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.

   Run the report Verify Costing Transaction, PUCGY303 to ensure that all PeopleSoft Inventory and, if applicable, Oracle's PeopleSoft Manufacturing transactions are posted to PeopleSoft General Ledger.

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

Properties

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

Task 2-27-3: Running Inventory Balances Report

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

To run the Inventory Balances report:

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

Properties

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

Task 2-27-4: Defining Delivery Setup Defaults

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

To define the default delivery options:

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

Properties

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

Task 2-28: Completing Supply Chain Planning

This section discusses:

- Completing Supply Planning Processes

Task 2-28-1: Completing Supply Planning Processes

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

- If not running the PeopleSoft SCM 88x Supply Planning "bolt-on", running Ascential to bring Planning Instance data back from PeopleSoft EPM to PeopleSoft SCM.
- Running the Supply Planning Post Application Engine.
- Applying all Supply Planning messages in Oracle's PeopleSoft Production Management, Oracle's PeopleSoft Purchasing (if applicable), and Oracle's PeopleSoft Inventory (if applicable).

Because of enhancements to the Supply Planning Messages functionality, any data still existing in the planning messages related tables will be obsolete. The data will be deleted during the data conversion. By completing your Supply Planning processes, there should not be any outstanding messages.

Properties

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

Task 2-29: Preparing Strategic Sourcing

This section discusses:

- Reviewing Event Status

Task 2-29-1: Reviewing Event Status

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

To determine event status:

1. Select Sourcing, Maintain Events, Event Workbench.

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

Properties

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

Task 2-30: Preparing Services Procurement

This section discusses:

- Running the Pre-Upgrade sPro Reports
- Reviewing the Pre-Upgrade sPro Reports
- Running the Pre-Upgrade sPro Queries
- Reviewing the Pre-Upgrade sPro Queries
- Completing Cost Collection

Task 2-30-1: Running the Pre-Upgrade sPro Reports

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

To run the pre-upgrade reports:

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

```
Identify Orphan sPro Records, PUEPQ712.SQR
sPro Work Orders to be Released, PUEPQ705.SQR
sPro Denied Timesheets, PUEPP704.SQR
```

Properties

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

Task 2-30-2: Reviewing the Pre-Upgrade sPro Reports

This section discusses:

- Reviewing Report PUEPQ712

- Reviewing Report PUEPQ705
- Reviewing Report PUEPP704

Reviewing Report PUEPQ712

This report identifies potentially orphaned records in the Bid Factor Mapping and Region Markup record structures. If any records appear in this report, you need to determine whether or not the record is valid, and then address changes that need to be made to the setIDs assigned to these records. In each case, the identified record has been moved from one record group to a new record group for the current release. This change may have some impact when prompting for values for the affected records. For example, if the record originally existed in a record group that was attached to one setID in your tableset sharing, and the record is being moved to a new record group that is attached to a different setID, then the setID value may need to be updated in the record so that prompting returns the expected values.

Reviewing Report PUEPQ705

If you do not have PeopleSoft Purchasing installed, you may skip this step.

This report generates a list of approved work orders that must be released. If your system is integrated with PeopleSoft Purchasing, releasing approved work orders ensures that the information is synchronized with PeopleSoft Purchasing.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

Reviewing Report PUEPP704

This report produces a list of denied timesheet lines that need to be resubmitted prior to running the data conversion. Any denied timesheet lines that are not resubmitted will cause double booking of the work order amount for the timesheet lines that are not denied.

Properties

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

Task 2-30-3: Running the Pre-Upgrade sPro Queries

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

To run the pre-upgrade queries:

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

```
sPro Time Template BU to setID, UPG_SPP706
sPro Vendor to Common Vendor, UPG_SPM709
Provider Auto Time Approval, UPG_SPZ11
```


Properties

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

Task 2-30-4: Reviewing the Pre-Upgrade sPro Queries

This section discusses:

- Reviewing Query UPG_SPP706
- Reviewing Query UPG_SPM709
- Reviewing Query UPG_SPZ11

Reviewing Query UPG_SPP706

Time templates are now setID-driven instead of business unit-driven. This report provides a list of all existing time templates by business unit. After data conversion completes, you use this report to evaluate and remove any duplicate templates. Another alternative is to reuse one template for multiple business units by mapping the business units to a common setID. New features need to be set up and configured before the review.

For additional information on how PeopleSoft Services Procurement uses time templates, calendars, and time reporting rules, see the following reference.

See *PeopleSoft Services Procurement 9.1 PeopleBook,* "Setting Up Application Specific Options for PeopleSoft Services Procurement."

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

Reviewing Query UPG_SPM709

In the new release, PeopleSoft Services Procurement uses the common vendor setup tables to obtain the Minority-Owned and Women-Owned vendor attributes. This query produces an exception report that lists the vendors from the common vendor setup table whose associated Contractor Type field contains a value that is different than the value on PeopleSoft Services Procurement's Services Supplier Info page. It also will list the vendor as an exception if the Women-Owned option from the common vendor setup page conflicts with what is on the Services Supplier Info page. You will need the output of this query to reconcile any discrepancies found in the post-upgrade step.

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

Reviewing Query UPG_SPZ11

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

Properties

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

Task 2-30-5: Completing Cost Collection

This step applies only if your PeopleSoft Services Procurement product is integrated with Oracle's PeopleSoft Project Costing product. In this step, you complete the Cost Collection for the Services Procurement process.

To run the Cost Collection process:

1. Select Project Costing, Cost Collection, Services Procurement.
2. Enter a run control ID.
3. Accept the defaults and click the Run button to submit the process for execution.

Properties

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

Task 2-31: Completing Purchasing Tasks

This section discusses:

- Loading Change Requests

Task 2-31-1: Loading Change Requests

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

Properties

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

Task 2-32: Completing eProcurement Tasks

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

Properties

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

Task 2-33: Processing Worklist Entries and Email Notification

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

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

Properties

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

Task 2-34: Setting Up Treasury

This section discusses:

- Understanding the Treasury Setup
- Running Auto Position Process
- Running the Payment Dispatch Process
- Deleting Duplicate Securities Data

Understanding the Treasury Setup

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

Task 2-34-1: Running Auto Position Process

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

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

To rerun the Auto Position process:

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

Properties

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

Task 2-34-2: Running the Payment Dispatch Process

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

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

Properties

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

Task 2-34-3: Deleting Duplicate Securities Data

In the new PeopleSoft FSCM release, the Key Field business unit has been deleted from the Securities definition. Therefore, if the same security definition has been set up under multiple business units, then the duplicate business units need to be identified and deleted.

To identify duplicate data:

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

```
UPG_TRU00
```


The results of this query display securities that have been set up under multiple business units. These security IDs need to be deleted.

3. Log into the query tool of your choice.
4. Enter every security ID that shows up in the query display for Bind Variable1.

   Bind Variable2 is the business unit for the security data that you want to retain.
5. Run the following SQL:

```
DELETE FROM PS_TRX_SEC_HDR WHERE SECURITY_ID =:1 AND BUSINESS_UNIT <>:2;
DELETE FROM PS_TRX_SEC_MKTVAL WHERE SECURITY_ID =:1 AND BUSINESS_UNIT <>:2;
```

6. Rerun the SQL until all the duplicate data has been deleted.

Properties

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

Task 2-35: Reviewing Table Row Counts

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

Properties

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

Task 2-36: Preparing Your Database

This section discusses:

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

- Dropping Temporary Tablespaces
- Shrinking Images

Understanding Database Preparation

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

Task 2-36-1: Verifying Database Integrity

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

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

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

Properties

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

Task 2-36-2: Cleaning the PSOBJCHNG Table

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

```
DELETE FROM PSOBJCHNG
```

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

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

Properties

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

Task 2-36-3: Purging Message Queues

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

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

```
APPMSGPURGEALL.DMS
```

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

Properties

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

Task 2-36-4: Dropping PeopleTools Tables

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

Drop the following tables:

- PSOPTIONS_TMP
- PSLANGUAGES_TMP
- PS_PSMCFQUEUESLANG

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

- PSOPTSTATUS

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

Properties

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

Task 2-36-5: Cleaning Up PeopleTools Data

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

Use the following instructions for your specific PeopleSoft PeopleTools release:

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

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

  See the PeopleTools: PeopleTools Portal Technologies PeopleBook, Appendix: "Language Support for Consuming and Producing Remote Portlets."

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

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

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

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

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

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

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

  Prior to PeopleSoft PeopleTools 8.52, CUB_OUTLINEID, CUB_CONNECTID, ANALYSIS_DB_APP, and ANALYSIS_DB_NAME were incorrectly defined as keys, causing non-unique run control IDs to be created. As of PeopleSoft PeopleTools 8.52, a unique index with the keys OPRID and RUN_CNTL_ID will be created for the PSCUBRUNCNTL table. You need to ensure that PSCUBRUNCNTL does not contain any duplicates so that the unique index can be created successfully later in the upgrade. To determine whether you have any rows of data that share the same set of values for OPRID and RUN_CNTL_ID, run the following SQL:

  ```
  SELECT OPRID, RUN_CNTL_ID, COUNT(RUN_CNTL_ID) AS NUMBER_OF_DUPLICATE_ROWS FROM⇒
  ```



```
PSCUBRUNCNTL GROUP BY OPRID, RUN_CNTL_ID HAVING COUNT(RUN_CNTL_ID) > 1;
```

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

Properties

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

Task 2-36-6: Dropping Temporary Tablespaces

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

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

Properties

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

Task 2-36-7: Shrinking Images

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

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

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

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

---

6. Launch PeopleSoft Application Designer.
7. Select Tools, Upgrade, Convert Images...
8. Select Convert Static Images in Image Catalog.
9. Click Start to convert or shrink images.

10. Select Tools, Upgrade, Convert Images...
11. Select Convert Dynamic Images for fields. Select the box for all of the fields listed.
12. Click Start to convert or shrink images.

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

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

To manually save images greater than 32 KB:

1. In PeopleSoft Application Designer, insert your images into a project.

   Select Insert, Definitions into Project.
2. Save the project.
3. Copy the images to file.

   Select Tools, Upgrade, Copy Project to File.
4. Delete the rows for the images in your project from the PSCONTDEFN table.
5. When you are finished with the upgrade, copy the project from file to restore your custom images.

   Select Tools, Upgrade, Copy Project from File.

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

Properties

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

Task 2-37: Renaming Records and Fields

This section discusses:

- Understanding Renaming Records and Fields
- Running the RNEPUPM14 Script
- Running the RNEPAUCM01 Script
- Running the RNEPEMT01 Script
- Running the RNEPGMT01 Script

- Running the RNEPLCT01 Script
- Retaining the Target Rename Log Files
- Running RNEPUPM14 Script on Copy of Current Demo
- Running RNEPAUCM01 Script on Copy of Current Demo
- Running RNEPEMT01 Script on Copy of Current Demo
- Running RNEPGMT01 Script on Copy of Current Demo
- Running RNEPLCT01 Script on Copy of Current Demo

Understanding Renaming Records and Fields

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

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

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

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

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

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

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

Task 2-37-1: Running the RNEPUPM14 Script

The RNEPUPM14.dms script will rename records, fields, and recfields on the Copy of Production database. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Properties

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

Task 2-37-2: Running the RNEPAUCM01 Script

The RNEPAUCM01.dms script will rename records, fields, and recfields on the Copy of Production database. Complete this step only if you have *not* applied the SCM Supplier Relationship Management 8.8 SP1 Bundle #15, Bundle Resolution #642050, or FSCM 8.8 SP1 Maintenance Pack 8. These renames should only execute during the initial upgrade pass, not during the Move to Production passes.

Follow the procedure below to edit your template so that the RNEPAUCM01 script can run automatically.

To run this script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-3: Running the RNEPEMT01 Script

The RNEPEMT01.dms script will rename records, fields, and recfields on the Copy of Production database. This script only applies if you have not applied Resolution #675598, FMS Financials 8.8SP1 Bundle #17 (Bundle Resolution #653743) or FSCM 8.8SP1 Maintenance Pack 9. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-4: Running the RNEPGMT01 Script

The RNEPGMT01.dms script will rename records, fields, and recfields on the Copy of Production database. This script only applies if you who have not applied Resolution #679204, FMS ESA 8.8SP1 Bundle #17 (Bundle Resolution #653749) or FSCM 8.8SP1 Maintenance Pack 9. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-5: Running the RNEPLCT01 Script

The RNEPLCT01.dms script will rename records, fields, and recfields on the Copy of Production database. This script only applies if you have not applied Resolution #674912, FMS Global Components 8.8SP1 Bundle #9 (Bundle Resolution #653905) or FSCM 8.8SP1 Maintenance Pack 9. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-6: Retaining the Target Rename Log Files

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

Properties

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

Task 2-37-7: Running RNEPUPM14 Script on Copy of Current Demo

The RNEPUPM14.dms script will rename records, fields, and recfields on the Copy of Current Demo database. These renames should only execute during the initial upgrade pass, not the Move to Production passes. Run this script in Data Mover user mode.

Properties

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

Task 2-37-8: Running RNEPAUCM01 Script on Copy of Current Demo

The RNEPAUCM01.dms script will rename records, fields, and recfields on the Copy of Current Demo database. Complete this step only if you have *not* applied SCM Supplier Relationship Management 8.8 SP1 Bundle #15, Bundle Resolutions #642050, or FSCM 8.8 SP1 Maintenance Pack 8. These renames should only execute during the initial upgrade pass and not during the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-9: Running RNEPEMT01 Script on Copy of Current Demo

The RNEPEMT01.dms script will rename records, fields, and recfields on the Copy of Current Demo database. This script only applies if you have not applied Resolution #675598, FMS Financials 8.8SP1 Bundle #17 (Bundle Resolution #653743) or FSCM 8.8SP1 Maintenance Pack 9. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-10: Running RNEPGMT01 Script on Copy of Current Demo

The RNEPGMT01.dms script will rename records, fields, and recfields on the Copy of Current Demo database. This script only applies if you have not applied Resolution #679204, FMS ESA 8.8SP1 Bundle #17 (Bundle Resolution #653749) or FSCM 8.8SP1 Maintenance Pack 9. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-37-11: Running RNEPLCT01 Script on Copy of Current Demo

The RNEPLCT01.dms script will rename records, fields, and recfields on the Copy of Current Demo database. This script only applies if you have not applied Resolution #674912, FMS Global Components 8.8SP1 Bundle #9 (Bundle Resolution #653905) or FSCM 8.8SP1 Maintenance Pack 9. These renames should only execute during the initial upgrade pass, not the Move to Production passes.

Follow the procedure below to edit your template so the script can run automatically.

To run the script automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Type from *ManualStop* to *DataMoverUser,* and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 2-38: Comparing Customizations

This section discusses:

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

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

Task 2-38-1: Running the UPGCUST Compare

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

- Feed categories
- Feed data types
- Feed definitions

- File reference type codes
- IB queues
- Java portlet user preferences
- Message catalog entries
- Messages
- Message schemas
- Portal registry user favorites
- Portal registry user home pages
- Related content layouts
- Related content services
- Related content service configurations
- Related content service definitions
- Service operation routings
- Service operations
- Service operations handlers
- Service operation versions
- Services
- WSDL

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

Properties

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

Task 2-38-2: Running the UPGCUST Filter Script

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

The script name for your upgrade is:

```
PUUPX99.DMS
```

See Appendix: “Using the Comparison Process.”

Properties

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

Task 2-38-3: Reviewing the UPGCUST Compare Log

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

Properties

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

Task 2-38-4: Restoring the Copy of Current Demo

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

Properties

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

Task 2-39: Preparing for the Application Upgrade

This section discusses:

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

Task 2-39-1: Creating a Copy of RecField Definitions

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

```
PUUPX07.DMS
```

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

Properties

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

Task 2-39-2: Creating a Copy of DbField Definitions

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

```
PUEPFAU41.DMS
```

Properties

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

Task 2-39-3: Loading the Alter Analyzer Data

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

Properties

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

Task 2-39-4: Deleting Old Pagelet Wizard Data

This step is only applicable if you have already upgraded your production application to PeopleSoft PeopleTools 8.46 or 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 PeopleSoft PeopleTools Pagelet Wizard tables. If you do not run the script, then items that were removed from the PeopleSoft PeopleTools version of Pagelet Wizard, but still exist in the Common Components version of Pagelet Wizard, will be copied back into the PeopleSoft PeopleTools version when the UPGPT846PP conversion program is run.

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

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

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

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

```
PTPPB_EOPPB.DMS
```

To run the step automatically:

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

Properties

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

Task 2-39-5: Exporting Upgrade Setup Data

This script exports upgrade setup data and mapping values from your Copy of Production database during the Initial or Move to Production upgrade pass, to preserve them for subsequent upgrade passes. You set up these values earlier in your Copy of Production database during various tasks in this chapter. You will load this information into your New Copy of Production in any future Move to Production passes.

The script name for your upgrade path is:

```
PUEP88EXP.DMS
```

You will need to preserve the corresponding DAT file in your current *PS_APP_HOME* directory for use in subsequent Move to Production passes.

The DAT file name for your upgrade path is:

```
PUEP88EXP.DAT
```


Properties

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

Task 2-40: Backing Up After Preparing Your Database

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

Properties

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

CHAPTER 3

Applying PeopleTools Changes

This chapter discusses:

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

Understanding PeopleTools Changes

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

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

Task 3-1: Verifying the Upgrade User

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

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

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

To grant your upgrade user PeopleSoft administrator privileges:

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

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

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

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

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

```
SELECT DISTINCT CLASSID FROM PSCLASSDEFN
```


c. Verify that at least one of the values returned by the first query is present in the list returned by the second query.

2. This Permission List should have access enabled to tools like Application Designer and Data Mover in the New Release Demo database. To verify this:

   a. Log in to the New Release Demo database's PIA.

   b. Select PeopleTools, Security, Permissions & Roles, Permission Lists.

   c. Enter the above Permission Lists name in the search box and click Search.

   d. Select the PeopleTools tab.

   e. Check the Application Designer Access and Data Mover Access check boxes if not already checked.

   f. Click Save.

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

Properties

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

Task 3-2: Performing Script Modifications

This section discusses:

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

Understanding Script Modifications

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

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

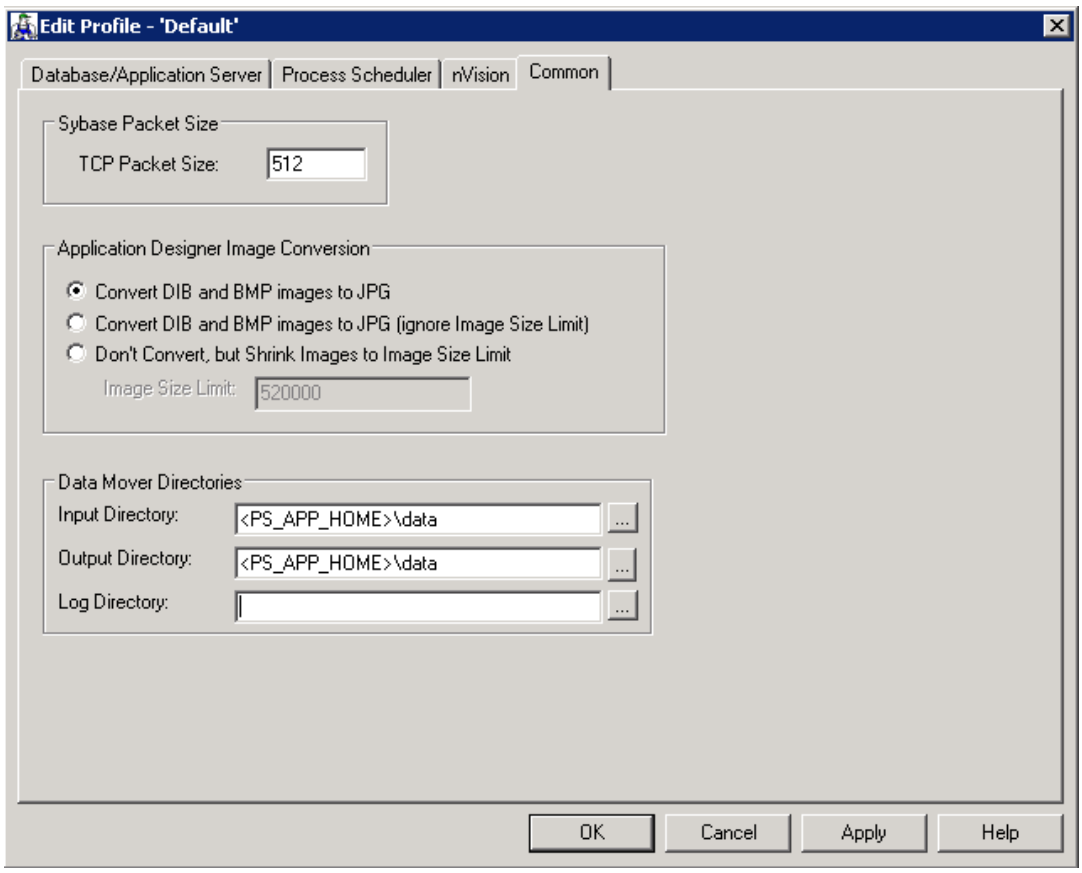
Task 3-2-1: Updating the Configuration Manager Profile

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

To update the profile:

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

   The following is an example of the Common tab.



Edit Profile - Default dialog box: Common tab

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

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

Properties

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

Task 3-2-2: Running a DBTSFIX Report

The DBTSFIX.SQR script aligns the tablespaces in the delivered release scripts with the Target database used during the upgrade. This process generates new release scripts, conforming to the 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.

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

Properties

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

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

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

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

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

Properties

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

Task 3-2-4: Editing the GRANT Script

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

Properties

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

Task 3-2-5: Editing the PTxxxTLS Scripts

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

To edit the PT*xxx*TLS scripts:

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

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

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

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

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


Properties

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

Task 3-2-6: Editing the DB2 Scripts

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

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

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

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

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

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

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

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

Properties

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

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

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

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

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

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

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

```
MVAPPIMP.DMS
MVPRDIMP.DMS
MVCGGLM25I.DMS
MVEP88IMP.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 PeopleTools: Data Management PeopleBook for your new release.

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

Properties

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

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

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

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

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


Properties

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

Task 3-2-9: Editing the DDL Parameters

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

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

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

Properties

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

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

This section discusses:

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

Understanding Integration Broker Conversion

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

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

Editing PTIBUPGRADE.DMS

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

Editing PTUPGIBDEL.SQL

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

To modify the PTUPGIBDEL.SQL script:

1. Search for the string `?--- End of PT8.xx ---?` in which *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading.
2. Delete the entire portion of the script below this string.
3. Save the script as *PS_HOME*\SCRIPTS\PTUPGIBDEL8*xx*.SQL in which *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading, as determined in step 1.

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

Editing the Change Assistant Template

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

To edit the template:

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

Properties

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

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

This section discusses:

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

Understanding Preparing for a PeopleTools Patch

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

Upgrading Without a PeopleTools Patch

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

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

To set the patch steps as complete:

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

Upgrading With a PeopleTools Patch

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

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

To prepare for applying a PeopleSoft PeopleTools patch:

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

   85*X* represents the PeopleSoft PeopleTools release of the patch project, which should correspond to the PeopleSoft PeopleTools release to which you are upgrading.
4. Click OK.
5. If you license multiple languages and translatable changes were delivered in the patch, perform the following steps:

   a. In the task Copying Projects, right-click the step Copying the PATCH85XML Project, and then select Step Properties.

   b. In the Step Properties dialog box, change the #PROJECT value in the Parameters field from *PATCH85XML* to the actual name of the PeopleTools patch project (e.g., *PATCH850ML*).

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

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

d. On the Copy Options tab, deselect any languages that you do not license.

Common and English should remain deselected.

e. Click OK three times.

Properties

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

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

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

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

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

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

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

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

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

Properties

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

Task 3-2-13: Editing Multilingual Step Properties

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

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

To edit multilingual step properties:

1. In PeopleSoft Change Assistant, select the step.
2. Open the Step Properties dialog box.
3. Click the Upgrade button, and then click the Options button.
4. On the Copy Options tab, deselect any languages that you do not license.

   Common and English should remain deselected.
5. Click OK three times.
6. Save the template in PeopleSoft Change Assistant.

See Copying the PPLTLS84CURML Project.

See Copying the PPLTLSML Project.

Properties

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

Task 3-2-14: Editing Data Type Steps

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

To set the Data Conversion steps as complete:

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

See Converting Database Data Types.

Properties

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

Task 3-3: Performing Updates to PeopleTools System Tables

This section discusses:

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

Understanding Updating PeopleTools System Tables

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

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

Task 3-3-1: Cleaning Up Message Data

This step runs PTUPGIBDEL8*xx*.SQL, where *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading. Message functionality and structure changed as of PeopleSoft PeopleTools 8.48, and the old data is obsolete.

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

Properties

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

Task 3-3-2: Updating System Catalog Views

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

Properties

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

Task 3-3-3: Updating PeopleTools System Tables

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

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

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

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

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

Properties

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

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

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

Properties

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

Task 3-3-5: Exporting Installation Data

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

Properties

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

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

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

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

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

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

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

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

Database Platform	Code Used
Oracle	ORA
Informix	INF
Sybase	SYB

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

Properties

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

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

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

Properties

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

Task 3-3-8: Updating PeopleTools Patch Information

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

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

Properties

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

Task 3-3-9: Creating Temporary Performance Indexes

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

Properties

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

Task 3-3-10: Exporting PeopleTools System Tables

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

The script name for your upgrade path is:

```
MVPRDEXP.DMS
```

Properties

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

Task 3-3-11: Importing PeopleTools System Tables

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

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

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

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

The script name for your upgrade path is:

```
MVPRDIMP.DMS
```


Properties

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

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

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

Properties

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

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

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

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

Properties

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

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

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

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

Properties

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

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

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

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

Properties

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

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

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

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

Properties

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

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

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

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

Properties

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

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

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

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

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

See "Completing Database Changes," Enabling Oracle Transparent Data Encryption.

Properties

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

Task 3-4: Turning Off Change Control

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

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

See "Completing Database Changes," Reviewing Change Control.

Properties

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

Task 3-5: Loading Model Definition Data

This section discusses:

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

Understanding Loading Model Definition Data

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

See Performing Script Modifications.

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

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

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

Properties

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

Task 3-6: Loading Message Data

This step runs the MSGTLSUPG.DMS script, which loads system messages in the message catalog.

Properties

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

Task 3-7: Reviewing PeopleTools Objects

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

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

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

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

To review PeopleSoft PeopleTools objects:

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

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

2. Verify that all object types are selected.
3. Select Options.
4. Select a value for Target Orientation.
5. For Comparison, use one of these options:
   - For Comparison by Release, select the highest release in the list.
   - For Compare by Date, select a date.
6. Under Compare Languages, select Common and English.
7. If you have non-English languages loaded, select the other languages that are loaded into your database.

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

   This will cause only customizations to appear on the compare reports.
10. Click OK.
11. Click Compare to start the compare process.
12. Evaluate the compare reports to identify whether the delivered objects conflict with any of your customizations.

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

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

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

Properties

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

Task 3-8: Copying Projects

This section discusses:

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

Understanding Copying Projects

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

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

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

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

Task 3-8-1: Copying the PPLTLS84CUR Project

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

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

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

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

Properties

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

Task 3-8-2: Copying the PPLTLS84CURML Project

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

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

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

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

Properties

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

Task 3-8-3: Copying the PPLTLSML Project

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

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

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

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

Properties

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

Task 3-8-4: Copying the PPLTLS84CURDEL Project

This process deletes specified PeopleSoft PeopleTools objects from your database.

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

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

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

Properties

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

Task 3-8-5: Copying the PATCH85X Project

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

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

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

Properties

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

Task 3-8-6: Copying the PATCH85XML Project

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

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

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

Properties

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

Task 3-9: Populating Tablespace Data

This section discusses:

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

Task 3-9-1: Creating Application Tablespaces

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

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

Properties

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

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

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

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

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

```
EPDDL.SH
```

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

Properties

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

Task 3-9-3: Populating Updated Tablespace Data

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

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

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

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

Properties

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

Task 3-9-4: Updating Tablespace Names

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

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

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

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

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

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

Properties

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

Task 3-10: Building the Updated PeopleTools Project

This section discusses:

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

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

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

```
PPLTLS84CURTABLES.SQL
```

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

Properties

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

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

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

Properties

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

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

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

Properties

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

Task 3-11: Migrating Records to New Tablespaces

This section discusses:

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

Understanding Record Migration to New Tablespaces

In this task you migrate the tables delivered in the PT84TBLSPC project to the correct tablespaces. Prior to starting this task, you may find it useful to compare the PT84TBLSPC project to find out which tables were assigned to a different tablespace in the new release.

Task 3-11-1: Copying the PT84TBLSPC Project

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

Note. For Oracle platforms, PeopleSoft PeopleTools uses the storage parameters and tablespace information from the database catalog instead of PSRECTBLSPC when generating a script from building a project. Contact your database administrator to manually migrate a table to a different tablespace.

Properties

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

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

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

```
TABLESPACEALTERTABLES.SQL
```

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

Properties

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

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

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

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

Properties

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

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

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

Properties

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

Task 3-12: Loading Base Data

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

Properties

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

Task 3-13: Loading Language Data

This section discusses:

- Populating the Language Table
- Loading the Language Data

Task 3-13-1: Populating the Language Table

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

Properties

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

Task 3-13-2: Loading the Language Data

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

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

Properties

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

Task 3-14: Loading PeopleTools Data

This section discusses:

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

Task 3-14-1: Loading Noncomparable Objects

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

Properties

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

Task 3-14-2: Loading English Messages

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

Properties

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

Task 3-14-3: Loading English String Data

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

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

Properties

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

Task 3-14-4: Loading Stored Statements Data

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

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

Properties

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

Task 3-15: Loading PeopleTools Definition Group

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

Properties

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

Task 3-16: Converting PeopleTools Objects

This section discusses:

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

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

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

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

Properties

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

Task 3-16-2: Populating MCF Data

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

Properties

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

Task 3-16-3: Converting Portal Objects

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

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

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

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

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

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

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

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

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

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

See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your new release.

Properties

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

Task 3-16-4: Converting Query Prompt Headings

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

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

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

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

Properties

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

Task 3-16-5: Encrypting Connector Passwords

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

Properties

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

Task 3-16-6: Loading Conversion Data

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

Properties

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

Task 3-16-7: Reporting Conversion Details

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

Properties

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

Task 3-16-8: Running PeopleTools Data Conversion

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

Properties

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

Task 3-17: Creating PeopleTools Views

This section discusses:

- Creating Updated PeopleTools Views

Task 3-17-1: Creating Updated PeopleTools Views

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

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

Properties

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

Task 3-18: Converting Integration Broker

This section discusses:

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

Understanding Converting Integration Broker

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

Task 3-18-1: Updating Integration Broker Defaults

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

Properties

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

Task 3-18-2: Creating Integration Broker Objects

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

Properties

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

Task 3-18-3: Saving Application Messaging Objects

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

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

Properties

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

Task 3-18-4: Exporting Node Transactions

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

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

Properties

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

Task 3-18-5: Preparing Integration Broker Deletes

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

Properties

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

Task 3-18-6: Deleting Application Messaging Objects

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

Properties

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

Task 3-18-7: Deleting Node Transactions

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

Properties

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

Task 3-19: Converting Integration Broker Objects

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

Properties

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

Task 3-20: Updating Process Request Tables

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

Properties

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

Task 3-21: Clearing the Rowset Cache

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

Properties

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

Task 3-22: Setting Object Version Numbers

In this task, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Note. You will rerun the VERSION application engine program later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to rename the files manually after completing this task.

Properties

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

Task 3-23: Converting Database Data Types

This section discusses:

- Understanding Converting Database Data Types
- Backing Up Before Platform Changes
- Running the Long Data Audit
- Validating the Microsoft Database
- Reviewing Microsoft Settings
- Creating the Microsoft Conversion Project
- Generating the Microsoft Conversion Script
- Running the Microsoft Conversion Script
- Granting Permissions to the CONNECT ID
- Running the Microsoft Conversion Report
- Validating the Oracle Database
- Creating Oracle Audit Tables
- Auditing Duplicate Length Constraints
- Auditing Disabled Constraints
- Reviewing Oracle Settings
- Generating Oracle Conversion Scripts
- Running Long to LOB Script 1
- Running Long to LOB Script 2
- Running Long to LOB Script 3
- Running Long to LOB Script 4
- Running Long to LOB Script 5
- Running Long to LOB Script 6
- Running Long to LOB Script 7
- Running Long to LOB Script 8
- Auditing the Long to LOB Conversion
- Running CLS Drop Indexes Script 1
- Running CLS Drop Indexes Script 2
- Running CLS Drop Indexes Script 3
- Running CLS Drop Indexes Script 4
- Running CLS Drop Indexes Script 5
- Running CLS Drop Indexes Script 6

- Running CLS Drop Indexes Script 7
- Running CLS Drop Indexes Script 8
- Running Character Length Script 1
- Running Character Length Script 2
- Running Character Length Script 3
- Running Character Length Script 4
- Running Character Length Script 5
- Running Character Length Script 6
- Running Character Length Script 7
- Running Character Length Script 8
- Running CLS Rebuild Indexes Script 1
- Running CLS Rebuild Indexes Script 2
- Running CLS Rebuild Indexes Script 3
- Running CLS Rebuild Indexes Script 4
- Running CLS Rebuild Indexes Script 5
- Running CLS Rebuild Indexes Script 6
- Running CLS Rebuild Indexes Script 7
- Running CLS Rebuild Indexes Script 8
- Auditing Character Length Semantics
- Reviewing Conversion Reports
- Updating Database Options

Understanding Converting Database Data Types

As of PeopleSoft PeopleTools 8.48, new database data types are supported for Microsoft SQL Server 2005 or later and Oracle 9i or later. These data type changes are mandatory for PeopleSoft application releases 9.0 or later. However, if you are either already using the new data types in conjunction with a PeopleSoft application release that is 9.0 or later, or are upgrading to a PeopleSoft application release that is earlier than 9.0, you should *not* run this task and should have already marked the steps in this task as complete in the PeopleSoft Change Assistant template. Do *not* run this task unnecessarily.

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

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

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

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

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

Task 3-23-1: Backing Up Before Platform Changes

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

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

The following command updates the statistics on the database catalog:

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

Properties

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

Task 3-23-2: Running the Long Data Audit

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

Properties

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

Task 3-23-3: Validating the Microsoft Database

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

Properties

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

Task 3-23-4: Reviewing Microsoft Settings

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

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

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

Note. During Move to Production passes, copy MSSNEWTYPE_ALTER.SQL from your initial pass upgrade's output directory and place it into the output directory for your Move to Production pass. This script is only generated during the initial pass. Edit the script and correct the database name on the first line of the script to point to the Target database for the pass.

Properties

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

Task 3-23-5: Creating the Microsoft Conversion Project

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

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	MS SQL Server	All

Task 3-23-6: Generating the Microsoft Conversion Script

This step generates the SQL script MSSNEWTYPE_ALTER.SQL to alter the records in the MSSNEWTYPE project. The generated script will alter the tables with the new data types.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	MS SQL Server	All

Task 3-23-7: Running the Microsoft Conversion Script

This step runs the generated script from the previous step. This will alter the existing tables to use the new data types. All of the tables will be copied into their new representation using the new data types and all of the additional padding blanks derived from the use of the old data types will be truncated.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server	All

Task 3-23-8: Granting Permissions to the CONNECT ID

This step runs the GRANT.SQL script. This script grants select access to the CONNECT ID for tables necessary for sign on.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server	All

Task 3-23-9: Running the Microsoft Conversion Report

This step runs CONVERSION-AUDIT.SQL, which audits for all unconverted fields. You will review the output in a later step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server	All

Task 3-23-10: Validating the Oracle Database

This step runs the DBSETTINGS.SQL script, which queries the database to determine the value of the NLS_LENGTH_SEMANTICS parameter. You will review the output in a later step.

There are two possible conversions that may occur depending on whether or not the database is Unicode. The Long to LOB conversion will apply to all databases, Unicode or ANSI. CHARACTER LENGTH SEMANTICS (CLS) only applies to Unicode databases. The CLS conversion has a dependency on the init.ora parameter NLS_LENGTH_SEMANTICS. The init.ora parameter NLS_LENGTH_SEMANTICS=CHAR, must be enabled for PeopleSoft Unicode databases prior to executing the conversion. If the database being converted is ANSI, then this setting is not necessary.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-11: Creating Oracle Audit Tables

This step runs PRECNVADT1A.SQL, which drops and re-creates some temporary tables required by the pre-conversion audit SQRs.

If the tables being dropped, CHECK_CONSTRAINTS, DUPLICATE_CONSTRAINTS, and DROP_CONSTRAINTS, don't exist, the execution of this script will generate the following error, which can safely be ignored:

```
ORA-00942: table or view does not exist
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-12: Auditing Duplicate Length Constraints

This step runs PRECNVADT1.SQR, which checks for duplicate length constraints. This condition can generally exist if the database was created using the Oracle Import utility and CONSTRAINTS=Y was enabled, which is the default setting. You will review the output in a later step.

Note. If this SQR needs to be rerun for any reason, you *must* run PRECNVADT1A.SQL before rerunning PRECNVADT1.SQR.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-13: Auditing Disabled Constraints

This step runs PRECNVADT2.SQR, which checks for 'not_validated' constraints. Although this condition should not exist in a production database, it may have occurred if data was imported with external utilities, such as SQL Loader. You will review the output in a later step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-14: Reviewing Oracle Settings

The data type conversion is only supported for Oracle 9i or later when you are upgrading to PeopleSoft PeopleTools 8.48 or later and to a PeopleSoft application release that is 9.0 or later. Do *not* perform the rest of this task if you do not meet the qualifications.

For Unicode databases, examine the log file from the step Auditing Duplicate Length Constraints. If there are any duplicate length constraints, those duplicate constraints must be dropped. Run the utility SQL script, *PS_HOME*\scripts\GENDROPDUPCONSTRAINTS.SQL, to generate the script DROPDUPCONSTRAINTS.SQL, containing an ALTER TABLE *TABLE_NAME* DROP CONSTRAINT for every duplicate constraint found. Run the DROPDUPCONSTRAINTS.SQL to resolve the duplicate length constraints.

For Unicode databases, examine the log file from the step Auditing Disabled Constraints. If there are any disabled or non-validated constraints, these constraints should be re-validated. Run the utility SQL script, *PS_HOME*\scripts\GENREVALIDATECONSTRAINTS.SQL to generate the script REVALIDATECONSTRAINTS.SQL, containing an ALTER TABLE *TABLE_NAME* ENABLE VALIDATE CONSTRAINT *CONSTRAINT_NAME* for every invalid constraint found. Run the REVALIDATECONSTRAINTS.SQL to enable the constraints.

For Unicode databases, examine the log file from the step "Validating the Oracle Database" to determine if the values in the init.ora file are set properly. For Unicode databases, the NLS_LENGTH_SEMANTICS parameter needs to have a value of *CHAR*. This indicates that CHARACTER LENGTH SEMANTICS is enabled and the conversion can continue. If you need to enable Character Length Semantics, work with your database administrator to modify the init.ora for the Target database's SID and set NLS_LENGTH_SEMANTICS to *CHAR*. Then stop and restart the database SID for the setting to take effect.

Note. The NLS_LENGTH_SEMANTICS parameter should be set to *CHAR only* at this point in the upgrade, and should not be set to *CHAR* earlier in the upgrade. If it is set at the time of database creation, the data type conversion scripts will fail with an ORA-30556 error due to the existence of functional indexes on the table.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-15: Generating Oracle Conversion Scripts

Work with your database administrator to set the following init.ora parameters for the Target database's system identifier (SID). Stop and restart the database SID for the following settings to take effect:

1. Set the following init.ora parameters:

```
db_block_size=8192
db_cache_size=325165824
db_file_multiblock_read_count=8
job_queue_processes=10
shared_pool_size=425829120
pga_aggregate_target=5871947670
parallel_max_servers=8
workarea_size_policy=AUTO
```

Note. If you are using Oracle 10.2.0.5 or higher, you may use the parameters SGA_TARGET=300M and SGA_MAX_SIZE=350M instead of SHARED_POOL_SIZE, DB_CACHE_SIZE, and DB_BLOCK_BUFFERS.

---

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure that you have at least six redo logs sized at 500 MB each.

The Oracle data types script generation program is a Java program which connects to an Oracle database. The prerequisites are Java and the Oracle JDBC Drivers.

The Java JDK required for this conversion program to run (Version 1.5) will automatically be picked up by the .bat file if the *PS_HOME* environment variable is set.

To verify whether the *PS_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %PS_HOME%;
```

   This should return a path, for example:
   `c:\PSOFT\PT852`

2. If the *PS_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET PS_HOME=PS_Home_location
```

The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the %ORACLE_HOME% environment variable is set.

To verify whether the *ORACLE_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

   ```
   echo %ORACLE_HOME%;
   ```

   This should return a path, for example:
   `c:\oracle\product\10.2.0\client_1;`

2. If the *ORACLE_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

   ```
   SET ORACLE_HOME=Oracle_Home_location
   ```

The Oracle data types script generation program is executed using the *PS_HOME*\utility \PSORADataTypesConversion.BAT file, which requires six input parameters:

- THREADS: The number of Java threads that the conversion script generation spawns to generate the scripts. We recommend 10 threads for running this program on Windows.
- ACCESSID: The access ID for the database to be converted.
- ACCESSIDPW: The access password for the database to be converted.
- DBNAME: The database name.
- OUTPUTDIR: A directory path to redirect the generated conversion scripts to a user-specified directory. This must be set to the PeopleSoft Change Assistant output directory for your upgrade pass. PeopleSoft Change Assistant will run the generated scripts later in the upgrade.
- ORACLEVERSION: The version of Oracle Connectivity that you are using (9, 10, or 11).

Example:

```
PS_HOME\utility\PSORADataTypesConversion.bat 10 SYSADM SYSADM MYDB c:\upgrade⇒
\output\Change_Assistant_job_directory 11
```

In the example command line above:

- THREADS = 10
- ACCESSID = SYSADM
- ACCESSIDPW = SYSADM
- DBNAME = MYDB
- OUTPUTDIR = c:\upgrade\output\Change_Assistant_job_directory
- ORACLEVERSION = 11

Open a command prompt window on the client workstation and execute the Oracle data types script generation program *PS_HOME*\utility\PSORADataTypesConversion.bat. The program will display and write a log (PsOraCnv.log) to the directory specified by the OUTPUTDIR parameter indicating the status of the conversion program. Review PsOraCnv.log and ensure that the conversion scripts were generated cleanly.

For ANSI databases, only LONGTOLOBALTER conversion scripts are generated. For Unicode databases, four sets of scripts are generated: LONGTOLOBALTER conversion scripts, CLSDROPINDEXES scripts, CHARACTERLENGTHSEMANTICSALTER scripts, and CLSREBUILDINDEXES scripts.

After successfully running the conversion program, verify that the generated SQL scripts are located in the staging PeopleSoft Change Assistant output directory for your upgrade pass. Later in the upgrade, PeopleSoft Change Assistant will automatically run the SQL scripts later in the upgrade from the PeopleSoft Change Assistant output directory for your upgrade pass.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-16: Running Long to LOB Script 1

This step runs LONGTOLOBALTER1.SQL, which was generated using 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 3-23-17: 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 3-23-18: 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.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-19: Running Long to LOB Script 4

This step runs LONGTOLOBALTER4.SQL, which was generated using 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 3-23-20: 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 3-23-21: 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 3-23-22: 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.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-23: Running Long to LOB Script 8

This step runs LONGTOLOBALTER8.SQL, which was generated using 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 3-23-24: Auditing the Long to LOB Conversion

This step runs L2LAUDIT.SQR to report on the output of the long to LOB conversion. You will review the report output in a later step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-25: Running CLS Drop Indexes Script 1

This step runs CLSDROPINDEXES1.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-26: Running CLS Drop Indexes Script 2

This step runs CLSDROPINDEXES2.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-27: Running CLS Drop Indexes Script 3

This step runs CLSDROPINDEXES3.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-28: Running CLS Drop Indexes Script 4

This step runs CLSDROPINDEXES4.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-29: Running CLS Drop Indexes Script 5

This step runs CLSDROPINDEXES5.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-30: Running CLS Drop Indexes Script 6

This step runs CLSDROPINDEXES6.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-31: Running CLS Drop Indexes Script 7

This step runs CLSDROPINDEXES7.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-32: Running CLS Drop Indexes Script 8

This step runs CLSDROPINDEXES8.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-33: Running Character Length Script 1

This step runs CHARACTERLENGTHSEMANTICSALTER1.SQL, which was generated using 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 3-23-34: 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.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-35: Running Character Length Script 3

This step runs CHARACTERLENGTHSEMANTICSALTER3.SQL, which was generated using 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 3-23-36: 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 3-23-37: 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 3-23-38: 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.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-39: Running Character Length Script 7

This step runs CHARACTERLENGTHSEMANTICSALTER7.SQL, which was generated using 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 3-23-40: 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 3-23-41: Running CLS Rebuild Indexes Script 1

This step runs CLSREBUILDINDEXES1.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-42: Running CLS Rebuild Indexes Script 2

This step runs CLSREBUILDINDEXES2.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-43: Running CLS Rebuild Indexes Script 3

This step runs CLSREBUILDINDEXES3.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-44: Running CLS Rebuild Indexes Script 4

This step runs CLSREBUILDINDEXES4.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-45: Running CLS Rebuild Indexes Script 5

This step runs CLSREBUILDINDEXES5.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-46: Running CLS Rebuild Indexes Script 6

This step runs CLSREBUILDINDEXES6.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-47: Running CLS Rebuild Indexes Script 7

This step runs CLSREBUILDINDEXES7.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-48: Running CLS Rebuild Indexes Script 8

This step runs CLSREBUILDINDEXES8.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-49: Auditing Character Length Semantics

This step runs CLSAUDIT.SQR to report on the output of the character length semantics conversion. You will review the report output in a later step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-23-50: Reviewing Conversion Reports

To review the conversion report for Microsoft, examine the log file from the step “Running the Microsoft Conversion Report.” It contains a list of unconverted columns on tables along with its old data type. Fields on tables with no PeopleSoft Application Designer definition will be included in this log. Any unresolved errors from the step “Running the Microsoft Conversion Script” will also be included. If you are using these tables, it is possible to update them manually to use the new data types with a SQL query tool or with an ETL tool. Be very cautious when changing a table, as this could result in data loss or affected functionality. Once any underlying problems have been resolved, you may rerun all of the previous steps in this task to reconvert any remaining objects listed by the audit report.

Note. During Move to Production passes for Microsoft, you must manually convert any remaining objects. During Move to Production passes, the record definition differs from the database table structure, so do *not* build the record with PeopleSoft Application Designer.

To review the conversion reports for Oracle, examine the log files from running the LONGTOLOBALTER*.SQL scripts. If the database is Unicode, also examine the log files for the CHARACTERLENGTHSEMANTICS*.SQL scripts. Review the output from the step "Auditing the Long to LOB Conversion." L2LAUDIT.SQR reports on any unconverted long raw columns. The table name, column name, and column data type are listed. For Unicode databases, review the output from the step "Auditing Character Length Semantics." CLSAUDIT.SQR reports on any unconverted character length columns (Unicode only). Correct any errors listed on the log files or conversion reports before proceeding with the upgrade. You can manually convert any tables listed in the audit, or resolve errors that led to the unconverted columns and rerun the conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server Oracle	All

Task 3-23-51: Updating Database Options

This step runs UPGDBOPTIONS_ENABLE.SQL. This script updates the database to indicate that the new data types are now enabled.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server Oracle	All

Task 3-24: Converting Oracle Time Data Types

This section discusses:

- Understanding Oracle Time Data Types Conversion
- Backing Up Before Converting Data Types
- Creating Conversion Audit Tables
- Auditing Date to Timestamp Conversion
- Generating Timestamp Conversion Scripts
- Running Drop Indexes Script 1
- Running Drop Indexes Script 2
- Running Drop Indexes Script 3
- Running Drop Indexes Script 4

- Running Drop Indexes Script 5
- Running Drop Indexes Script 6
- Running Drop Indexes Script 7
- Running Drop Indexes Script 8
- Running Alter Timestamps Script 1
- Running Alter Timestamps Script 2
- Running Alter Timestamps Script 3
- Running Alter Timestamps Script 4
- Running Alter Timestamps Script 5
- Running Alter Timestamps Script 6
- Running Alter Timestamps Script 7
- Running Alter Timestamps Script 8
- Running Rebuild Indexes Script 1
- Running Rebuild Indexes Script 2
- Running Rebuild Indexes Script 3
- Running Rebuild Indexes Script 4
- Running Rebuild Indexes Script 5
- Running Rebuild Indexes Script 6
- Running Rebuild Indexes Script 7
- Running Rebuild Indexes Script 8

Understanding Oracle Time Data Types Conversion

In PeopleSoft PeopleTools 8.50 and higher, the TIMESTAMP data type is now supported for the PeopleSoft TIME and DATETIME field types. These data type changes are mandatory, and the DATE data type will no longer be used for the TIME and DATETIME fields.

PeopleSoft Change Assistant will display and run the steps in this task *only* if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

Task 3-24-1: Backing Up Before Converting Data Types

Back up your upgrade database now. This enables you to restart your upgrade from this point, in case you experience any database integrity problems during the remaining tasks in the upgrade process.

Important! Contact your database administrator to update the statistics on the database catalog. This will improve performance for subsequent steps in the upgrade. Typically, only the users sys and sysdba have the authority to perform this task.

The following command updates the statistics on the database catalog:

```
EXEC DBMS_STATS.GATHER_SCHEMA_STATS('SYS');
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-2: Creating Conversion Audit Tables

This step runs PRETSCNVADT1A.SQL, which drops and re-creates some temporary tables required by the pre-conversion audit SQRs. If the tables being dropped, DERIVEDPSSQLTABLEANDINDEX, DROP_FUNCIDX_CANDIDATES, and DERIVEDTABLESWITHFUNCINDEXES, don't exist, the execution of this script will generate the following error, which you can safely ignore:

```
ORA-00942: table or view does not exist
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-3: Auditing Date to Timestamp Conversion

This step runs TSCAUDIT.SQR, which reports which columns by table are candidates for DATE to TIMESTAMP data type conversion.

Note. If this SQR needs to be rerun for any reason, you must run PRETSCNVADT1A.SQL before rerunning TSCAUDIT.SQR.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-4: Generating Timestamp Conversion Scripts

This section discusses:

- Understanding Timestamp Conversion Scripts
- Setting Parameters for the Database System Identifier
- Verifying Environment Variables
- Setting the Script Generation Parameters
- Executing the Script Generation Program

Understanding Timestamp Conversion Scripts

If you are performing your initial upgrade pass, complete all sections in this step to generate timestamp conversion scripts.

Important! During Move to Production passes, copy the DROPINDEXESn.SQL, ALTERTIMESTAMPSn.SQL, and REBUILDINDEXESn.SQL scripts from your initial upgrade pass output directory and place them in the output directory for your Move to Production pass. Edit the REBUILDINDEXESn.SQL scripts and replace the database name in the create index statement with the Move to Production database name, if needed. These scripts can only be generated correctly during the initial pass. You can skip the remaining sections of this step, which only apply to the initial upgrade pass.

You must manually convert any objects that are missed by the conversion; for example, those due to maintenance on records applied on the old release.

Setting Parameters for the Database System Identifier

Work with your database administrator to set init.ora parameters for the Target database's system identifier (SID). You must stop and restart the database SID for these settings to take effect.

To set the parameters:

1. Set the following init.ora parameters:

   ```
   db_block_size=8192
   db_cache_size=325165824
   db_file_multiblock_read_count=8
   job_queue_processes=10
   shared_pool_size=425829120
   pga_aggregate_target=5871947670
   parallel_max_servers=8
   workarea_size_policy=AUTO
   ```

   Note. If you are using Oracle 10g or higher, you may use the parameters SGA_TARGET=300M and SGA_MAX_SIZE=350M instead of SHARED_POOL_SIZE, DB_CACHE_SIZE, and DB_BLOCK_BUFFERS.

   ---

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure that you have at least six redo logs sized at 500 MB each.

Verifying Environment Variables

The Oracle data types script generation program is a Java program that connects to an Oracle database. The prerequisites are Java and the Oracle JDBC Drivers.

The Java JDK required for this conversion program to run (Version 1.5) will automatically be picked up by the .bat file if the *PS_HOME* environment variable is set.

To verify whether the *PS_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

   ```
   echo %PS_HOME%;
   ```


This should return a path, for example:
`c:\PSOFT\PT850`

2. If the *PS_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET PS_HOME=PS_Home_location
```

The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the *ORACLE_HOME* environment variable is set.

To verify whether the *ORACLE_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %ORACLE_HOME%;
```

This should return a path, for example:
`c:\oracle\product\10.1.0\client_1;`

2. If the *ORACLE_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET ORACLE_HOME=Oracle_Home_location
```

Setting the Script Generation Parameters

You execute the Oracle data types script generation program using the *PS_HOME*\utility \PSORATimestampConversion.bat file, which requires six input parameters. Set the following parameters:

- ACCESSID: The access ID for the database to be converted.
- ACCESSIDPW: The access password for the database to be converted.
- DBNAME: The database name.
- OUTPUTDIR: A directory path to redirect the generated conversion scripts to a user-specified directory. This must be set to the PeopleSoft Change Assistant output directory for your upgrade pass. PeopleSoft Change Assistant will run the generated scripts later in the upgrade.
- SCRIPTQTY: The number of concurrent scripts to generate. This parameter is mandatory. The recommendation is 8.
- ORACLEVERSION: The version of Oracle Connectivity that you are using (9, 10, or 11).

Example:

```
PS_HOME\utility\PSORATimestampConversion.bat SYSADM SYSADM MYDB c:\upgrade\output⇒
\Change_Assistant_job_directory 8 11
```

In the example command line above:

- ACCESSID = SYSADM
- ACCESSIDPW = SYSADM
- DBNAME = MYDB
- OUTPUTDIR = c:\upgrade\output\Change_Assistant_job_directory
- SCRIPTQTY = 8
- ORACLEVERSION = 11

Executing the Script Generation Program

Open a command prompt window on the client workstation and execute the Oracle data types script generation program *PS_HOME*\utility\PSORATimestampConversion.bat.

The program will display and write a log (PsTSOraCnv.log) to the directory specified by the OUTPUTDIR parameter indicating the status of the conversion program. Review PsOraCnvTS.log and ensure that the conversion scripts were generated cleanly.

For all databases, ANSI or Unicode, the following three sets of scripts are generated:

- DROPINDEXESn.SQL
- ALTERTIMESTAMPSn.SQL
- REBUILDINDEXESn.SQL

After successfully running the conversion script generation program, verify that the generated SQL scripts are located in the PeopleSoft Change Assistant output directory for your upgrade pass. Later in the upgrade, PeopleSoft Change Assistant will automatically run the SQL scripts from the PeopleSoft Change Assistant output directory for your upgrade pass.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-5: Running Drop Indexes Script 1

This step runs DROPINDEXES1.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-6: Running Drop Indexes Script 2

This step runs DROPINDEXES2.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-7: Running Drop Indexes Script 3

This step runs DROPINDEXES3.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-8: Running Drop Indexes Script 4

This step runs DROPINDEXES4.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-9: Running Drop Indexes Script 5

This step runs DROPINDEXES5.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-10: Running Drop Indexes Script 6

This step runs DROPINDEXES6.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-11: Running Drop Indexes Script 7

This step runs DROPINDEXES7.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-12: Running Drop Indexes Script 8

This step runs DROPINDEXES8.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-13: Running Alter Timestamps Script 1

This step runs ALTERTIMESTAMPS1.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-14: Running Alter Timestamps Script 2

This step runs ALTERTIMESTAMPS2.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-15: Running Alter Timestamps Script 3

This step runs ALTERTIMESTAMPS3.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-16: Running Alter Timestamps Script 4

This step runs ALTERTIMESTAMPS4.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-17: Running Alter Timestamps Script 5

This step runs ALTERTIMESTAMPS5.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-18: Running Alter Timestamps Script 6

This step runs ALTERTIMESTAMPS6.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-19: Running Alter Timestamps Script 7

This step runs ALTERTIMESTAMPS7.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-20: Running Alter Timestamps Script 8

This step runs ALTERTIMESTAMPS8.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-21: Running Rebuild Indexes Script 1

This step runs REBUILDINDEXES1.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-22: Running Rebuild Indexes Script 2

This step runs REBUILDINDEXES2.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-23: Running Rebuild Indexes Script 3

This step runs REBUILDINDEXES3.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-24: Running Rebuild Indexes Script 4

This step runs REBUILDINDEXES4.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-25: Running Rebuild Indexes Script 5

This step runs REBUILDINDEXES5.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-26: Running Rebuild Indexes Script 6

This step runs REBUILDINDEXES6.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-27: Running Rebuild Indexes Script 7

This step runs REBUILDINDEXES7.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-24-28: Running Rebuild Indexes Script 8

This step runs REBUILDINDEXES8.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 3-25: Backing Up After the PeopleTools Upgrade

Back up your Copy of Production database now. This enables you to restart your upgrade from this point, in case you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-26: Configuring the Scheduler and Server

Tips for configuring and starting the application server:

- Make sure that the application server domain that is being configured points to the Target database for this pass of the upgrade.
- Set a different JSL port for each database instance.
- Clear your application server cache.

Tips for configuring and starting the process scheduler: Do not enable load balancing, setup a distribution server, or configure a report node for the Process Scheduler at this point in time of the upgrade. PeopleSoft Change Assistant parses the generated log files for errors within a single specified output directory. Review the Process Scheduler log/output directory that is defined within the PeopleSoft Change Assistant environment for any database with the Enable Process Scheduler check box selected.

See the PeopleTools installation guide for your database platform for the new release.

See Getting Started on Your PeopleSoft Upgrade, Appendix: "Improving Performance."

Note. In addition, verify your PeopleSoft Change Assistant environment settings for the process scheduler and application server. Modify them as needed to match the servers that you just started.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 4

Running and Reviewing Compare Reports

This chapter discusses:

- Understanding Compare Reports
- Preparing for Application Changes
- Running the Alter Analyzer Loader
- Renaming Tables
- Copying Select Tables
- Running New Release Compare Reports
- Reviewing New Release Compare Reports

Understanding Compare Reports

Now that your Copy of Production database is at the same PeopleSoft PeopleTools release as your new release, you can compare the two databases to see the differences. In this chapter you run and review compare reports to make decisions regarding your upgrade. Be sure that you have plenty of space to run these reports, as some can be rather large.

Task 4-1: Preparing for Application Changes

This section discusses:

- Exporting Project Definitions
- Importing Project Definitions
- Dropping Tables and Views

Task 4-1-1: Exporting Project Definitions

In this step, you export from your Demo database the project definitions that will be used later in this upgrade. This step is run in the initial and Move to Production passes; therefore, during the Move to Production pass, the export is not run against the Demo database. You will import these definitions in the next step.

The script for your upgrade is:

```
DLUPX08E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 4-1-2: Importing Project Definitions

In this step, you import the project definitions into your Copy of Production database. These projects will be used later in this upgrade.

The script for your upgrade is:

```
DLUPX08I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-1-3: Dropping Tables and Views

This step will drop tables, views, or both, on the Copy of Production database. Some tables and views need to be dropped from the database prior to compare, copy, or generating DDL scripts. Some common reasons include:

- When a record was a view in a prior release and will be a table in the new release, the view must be dropped before the new tables are created.
- Records used as Application Engine state records for upgrade conversion code must exist on the database as an exact version of the record definition. You do not want these tables to be altered without deleting the obsolete columns. To make that happen, drop the table on the database at this point in the upgrade.
- Some records that have many fields and long row lengths will exceed database limitations if they are altered without deleting obsolete columns. If the table is considered a "temporary" table for batch processing, Oracle assumes that it will contain no relevant data at this point in the upgrade process. Dropping the table at this point in the upgrade will eliminate the row length problems that could occur later in the upgrade.

If for some reason any of these tables or views do not exist in your database, and you receive SQL errors, that is acceptable and you can proceed with your upgrade.

The script name for your upgrade path is:

```
DLEPUPM07.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-2: Running the Alter Analyzer Loader

In this step, you run the PTALTDATLOAD Application Engine program. This process preserves the database structure from your current release in temporary tables to be used later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-3: Renaming Tables

This section discusses:

- Understanding Renamed Tables
- Running the RNEPUPM01MSS Script
- Running the RNEPUPM01DB2 Script
- Running the RNEPUPM02DB2 Script
- Running the RNEPUPM01DBX Script
- Running the RNEPUPM02DBX Script
- Running the RNEPUPM01IFX Script
- Running the RNEPUPM01ORA Script
- Running the RNEPUPM01SYB Script
- Running the RNEPPLM01MSS Script
- Running the RNEPPLM01DB2 Script
- Running the RNEPPLM02DB2 Script
- Running the RNEPPLM01DBX Script
- Running the RNEPPLM02DBX Script
- Running the RNEPPLM01ORA Script
- Running the RNEPPLM01IFX Script

- Running the RNEPPLM01SYB Script

Understanding Renamed Tables

These SQL scripts rename tables, at the database level, to temporary table names. They do not change the Record Definition. These temporary tables will be used in the data conversion programs in a later step.

Near the end of the upgrade tasks, you will run a DDDAUDIT report again. On the report, these temporary tables will be listed in the section listing: "SQL Table defined in the Database and not found in the Application Designer." Either at that point or later, when you are comfortable with the results of the data conversion, you can drop these temporary tables.

In some database platforms, the related indexes and views must be dropped before the table can be renamed. Oracle has included drop statements for these objects that exist on the Demo version of the database. However, the list of related objects may be different in your environment because of customizations or applied product incidents. You may encounter errors in these scripts because of these differences—for example, the script might try to drop an index or view that you do not have or it cannot rename a table because there are more related objects that need to be dropped. You can ignore these errors and proceed with the test pass. Simply modify these scripts to work for your database and you will not encounter these errors in your next test pass.

Task 4-3-1: Running the RNEPUPM01MSS Script

RNEPUPM01MSS.SQL will rename tables on the Copy of Production database. This script is for Microsoft SQL Server databases and will run in the initial and Move to Production passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server	All

Task 4-3-2: Running the RNEPUPM01DB2 Script

RNEPUPM01DB2.SQL will drop the views related to the tables being renamed 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.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-3-3: Running the RNEPUPM02DB2 Script

RNEPUPM02DB2.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 4-3-4: Running the RNEPUPM01DBX Script

RNEPUPM01DBX.SQL will drop views related to the tables being renamed on the Copy of Production database. This script is for DB2 UDB databases on UNIX, Linux, or Windows and will run in the initial and Move to Production passes.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-3-5: Running the RNEPUPM02DBX Script

RNEPUPM02DBX.SQL will rename tables on the Copy of Production database. This script is for DB2 UDB databases on UNIX, Linux, or Windows and will run in the initial and Move to Production passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-3-6: Running the RNEPUPM01IFX Script

RNEPUPM01IFX.SQL will rename tables on the Copy of Production database. This script is for Informix databases and will run in initial and Move to Production passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 4-3-7: Running the RNEPUPM01ORA Script

RNEPUPM01ORA.SQL will rename tables on the Copy of Production database. This script is for Oracle databases and will run in initial and Move to Production passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-3-8: Running the RNEPUPM01SYB Script

RNEPUPM01SYB.SQL will rename tables on the Copy of Production database. This script is for Sybase databases and will run in initial and move to production passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Sybase	All

Task 4-3-9: Running the RNEPPLM01MSS Script

This section discusses:

- Understanding RNEPPLM01MSS
- Running the RNEPPLM01MSS Script Automatically
- Skipping the RNEPPLM01MSS Step

Understanding RNEPPLM01MSS

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM01MSS Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM01MSS Step” for instructions on how to mark this task complete. RNEPPLM01MSS.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01MSS Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01MSS Script” can run automatically.

To run the RNEPPLM01MSS script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01MSS Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01MSS Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure below to update your job so that "Running the RNEPPLM01MSS Script" will not be run.

To skip the RNEPPLM01MSS step:

1. In Change Assistant, select the step Running the RNEPPLM01MSS Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server	All

Task 4-3-10: Running the RNEPPLM01DB2 Script

This section discusses:

- Understanding RNEPPLM01DB2
- Running the RNEPPLM01DB2 Script Automatically
- Skipping the RNEPPLM01DB2 Step

Understanding RNEPPLM01DB2

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM01DB2 Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM01DB2 Step" for instructions on how to mark this task complete. RNEPPLM01DB2.SQL will drop the views related to the tables being renamed on the Copy of Production database.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Running the RNEPPLM01DB2 Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM01DB2 Script" can run automatically.

To run the RNEPPLM01DB2 script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01DB2 Script
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01DB2 Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure below to update your job so that "Running the RNEPPLM01DB2 Script" will not be run.

To skip the RNEPPLM01DB2 step:

1. In Change Assistant, select the step Running the RNEPPLM01DB2 Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-3-11: Running the RNEPPLM02DB2 Script

This section discusses:

- Understanding RNEPPLM02DB2
- Running the RNEPPLM02DB2 Script Automatically
- Skipping the RNEPPLM02DB2 Step

Understanding RNEPPLM02DB2

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM02DB2 Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM02DB2 Step" for instructions on how to mark this task complete. RNEPPLM02DB2.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM02DB2 Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM02DB2 Script" can run automatically.

To run the RNEPPLM02DB2 script automatically:

1. In Change Assistant, select the step Running the RNEPPLM02DB2 Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02DB2 Step

If you are upgrading from 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that "Running the RNEPPLM02DB2 Script" will not be run.

To skip the RNEPPLM02DB2 step:

1. In Change Assistant, select the step Running the RNEPPLM02DB2 Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-3-12: Running the RNEPPLM01DBX Script

This section discusses:

- Understanding RNEPPLM01DBX
- Running the RNEPPLM01DBX Script Automatically
- Skipping the RNEPPLM01DBX Step

Understanding RNEPPLM01DBX

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM01DBX Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM01DBX Step" for instructions on how to mark this task complete. RNEPPLM01DBX.SQL will drop the views related to the tables being renamed on the Copy of Production database.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Running the RNEPPLM01DBX Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM01DBX Script" can run automatically.

To run the RNEPPLM01DBX script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01DBX Script
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01DBX Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that "Running the RNEPPLM01DBX Script" will not be run.

To skip the RNEPPLM01DBX step:

1. In Change Assistant, select the step Running the RNEPPLM01DBX Script.

2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-3-13: Running the RNEPPLM02DBX Script

This section discusses:

- Understanding RNEPPLM02DBX
- Running the RNEPPLM02DBX Script Automatically
- Skipping the RNEPPLM02DBX Step

Understanding RNEPPLM02DBX

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM02DBX Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM02DBX Step" for instructions on how to mark this task complete. RNEPPLM02DBX.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM02DBX Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM02DBX Script" can run automatically.

To run the RNEPPLM02DBX script automatically:

1. In Change Assistant, select the step Running the RNEPPLM02DBX Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02DBX Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that "Running the RNEPPLM02DBX Script" will not be run.

To skip the RNEPPLM02DBX step:

1. In Change Assistant, select the step Running the RNEPPLM02DBX Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-3-14: Running the RNEPPLM01ORA Script

This section discusses:

- Understanding RNEPPLM01ORA
- Running the RNEPPLM01ORA Script Automatically
- Skipping the RNEPPLM01ORA Step

Understanding RNEPPLM01ORA

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM01ORA Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM01ORA Step" for instructions on how to mark this task complete. RNEPPLM01ORA.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01ORA Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM01ORA Script" can run automatically.

To run the RNEPPLM01ORA script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01ORA Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01ORA Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that "Running the RNEPPLM01ORA Script" will not be run.

To skip the RNEPPLM01ORA step:

1. In Change Assistant, select the step Running the RNEPPLM01ORA Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-3-15: Running the RNEPPLM01IFX Script

This section discusses:

- Understanding RNEPPLM01IFX
- Running the RNEPPLM01IFX Script Automatically
- Skipping the RNEPPLM01IFX Step

Understanding RNEPPLM01IFX

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM01IFX Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM01IFX Step" for instructions on how to mark this task complete. RNEPPLM01IFX.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01IFX Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM01IFX Script" can run automatically.

To run the RNEPPLM01IFX script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01IFX Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01IFX Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that "Running the RNEPPLM01IFX Script" will not be run.

To skip the RNEPPLM01IFX step:

1. In Change Assistant, select the step Running the RNEPPLM01IFX Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 4-3-16: Running the RNEPPLM01SYB Script

This section discusses:

- Understanding RNEPPLM01SYB
- Running the RNEPPLM01SYB Script Automatically
- Skipping the RNEPPLM01SYB Step

Understanding RNEPPLM01SYB

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to "Running the RNEPPLM01SYB Script Automatically". If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to "Skipping the RNEPPLM01SYB Step" for instructions on how to mark this task complete. RNEPPLM01SYB.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01SYB Script Automatically

Follow this procedure to edit your template so that "Running the RNEPPLM01SYB Script" can run automatically.

To run the RNEPPLM01SYB script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01SYB Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01SYB Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that "Running the RNEPPLM01SYB Script" will not be run.

To skip the RNEPPLM01SYB step:

1. In Change Assistant, select the step Running the RNEPPLM01SYB Script.
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Sybase	All

Task 4-4: Copying Select Tables

This section discusses:

- Running the DLCGGLU20E Script
- Running the DLCGGLU20I Script

Task 4-4-1: Running the DLCGGLU20E Script

The DLCGGLU20E and DLCGGLU20I scripts save the contents of the PSRECFIELDDB table to a temporary table (PS_FS_UPG_RECFLDDB) to be used by data conversion programs. PSRECFIELDDB is a PeopleSoft PeopleTools table that contains all records and the fields on those records. Running the DLCGGLU20E script at this point in the upgrade preserves the prior release record/field structure in the temporary table.

Note. The export can only run during the initial test pass. It is only during the initial pass that you have old release record structures in the new release PSRECFIELDDB table. You will need to preserve the .DAT file DLCGGLU20.DAT located in your *PS_APP_HOME*\DATA directory. It will need to exist in the *PS_APP_HOME*\DATA directory during your Move to Production passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-4-2: Running the DLCGGLU20I Script

The DLCGGLU20I script imports the data into the PS_FS_UPG_RECFLDDB temporary table.

Note. The import needs to run in both initial and Move to Production passes. The export script, DLCGGLU20E script will only run in the initial test pass. This script requires the DLCGGLU20.DAT file generated during the initial pass. The .DAT file should be located in your *PS_APP_HOME*\DATA directory.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5: Running New Release Compare Reports

This section discusses:

- Understanding the New Release Compare
- Preserving the Local Message Node
- Comparing Converted New Release Objects
- Running the New Release UPGCUST Compare
- Creating the UPGIB Project
- Resetting Flags for ChartField Objects

Understanding the New Release Compare

In this task you will compare your customizations to the new release objects by running a project compare against the Demo database.

Task 4-5-1: Preserving the Local Message Node

In this step, you run the PTUPGMSGNODE Application Engine process to preserve the Local Message Node in the UPGCUST project before the project compare between the Copy of Production and Demo databases.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-5-2: Comparing Converted New Release Objects

This step populates the UPGCUST project with object types that previously existed as non-comparable system data in the old release and are now comparable in the new release. They are marked **Changed* or **Unchanged* in your Copy of Production environment. Only custom objects should remain in the UPGCUST project.

This step compares the following object types:

- Feed category
- Feed data type
- Feed definition

- Related content layout
- Related content service
- Related content service configuration
- Related content service definition

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-5-3: Running the New Release UPGCUST Compare

This step executes a project compare of comparable objects in the UPGCUST project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-5-4: Creating the UPGIB Project

This step creates a project on your New Release Demo database called UPGIB and executes a database compare of Integration Broker objects. This project will be used to copy new release Integration Broker objects to the Copy of Production and to delete obsolete Integration Broker objects from the Copy of Production.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-5-5: Resetting Flags for ChartField Objects

This step turns Take Action flags on in the UPGCUST project for objects modified by the ChartField Configuration process. If you have added a new ChartField, you need to review and adjust the flags for all the new objects you have created to support the new ChartField, such as records, views, pages, and components. The script below sets the flag for most of those objects, but you may have used a different name than expected. If you have not added a new ChartField, but have relabeled, resized, renamed, or activated/inactivated a delivered ChartField, the script below will include all those objects and no additional action is required.

The script for your upgrade is:

```
DLEPFAU01.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-6: Reviewing New Release Compare Reports

This section discusses:

- Reviewing New Release Changes
- Reviewing Additional Upgrade Projects

Task 4-6-1: Reviewing New Release Changes

In this step, analyze the UPGCUST project and related compare reports. Select the Upgrade Flags for the customizations you wish to retain. This project may include object definitions that are on your Copy of Production database but not on the Copy of Current Demo database. Compare reports are viewable when you open the project in PeopleSoft Application Designer. You can use these reports to determine your copy action for each object in the project. By default, all Upgrade Flags in the project are deselected, meaning no action will take place.

If the Target column has the value *Absent* it can indicate one of two possible conditions. If Oracle originally delivered the object definition, then it can be considered obsolete in the new release. This value can also indicate that you originally created the object definition for some custom functionality. To ensure the integrity and functionality of the system, delete obsolete Oracle-delivered objects. If you have made a customization to an obsolete object, refer to the product's Release Notes to assess the functionality of the customization and determine where to reapply it in the new release.

See Appendix: "Using the Comparison Process."

Warning! Carefully review the compare results for URLs, permission lists, and message nodes. It is highly likely that you will want to keep any customizations that you have made to these objects. You will want to migrate your customized local message node. Please be sure to select the Upgrade Flags from within PeopleSoft Application Designer to retain these customizations.

Note. Steps in the database or third-party software installation documentation can result in Oracle-delivered objects being identified in the compare reports as **Changed* in the Source column. You should investigate all instances where objects are identified as **Changed* in the Source column to determine their origin and determine a plan of action based on the findings for each object.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-6-2: Reviewing Additional Upgrade Projects

In this step, analyze the UPGIB project and related compare reports, and the UPGNONCOMP project.

The UPGIB project is created in your Demo database by running a full database compare. It contains Integration Broker object definitions. The database compare produces compare reports that you can view by opening the project in PeopleSoft Application Designer. You can use these reports to determine your copy action for each object in the project. Analyze the UPGIB project and select the Upgrade Flags for the customizations you wish to retain.

If the Source column has the value *Absent* it can indicate one of two possible conditions. If Oracle originally delivered the object definition, then the object can be considered obsolete in the new release. Or, this value can indicate that you originally created the object definition for custom functionality. To ensure the integrity and functionality of the system, delete obsolete Oracle-delivered objects. If you have made a customization to an obsolete object, refer to the Release Notes for that product to assess the functionality of the customization and to determine where to reapply it in the new release.

The UPGNONCOMP project is delivered in your Demo database. It contains object definitions that cannot be compared using PeopleSoft Application Designer. The UPGNONCOMP project for your upgrade may contain some or all objects of the following object types: trees, access groups, roles, dimensions, cube definitions, and cube instance definitions. These object definitions are required for your upgraded database to function correctly. You need to review this project to see whether you customized any of the objects. You then need to reapply those customizations later in the upgrade.

See Appendix: “Using the Comparison Process”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

CHAPTER 5

Applying Application Changes

This chapter discusses:

- Understanding Application Changes
- Running the New Release Upgrade Copy
- Updating Database Overrides
- Backing Up After the Upgrade Copy
- Configuring ChartFields
- Modifying Trigger Tables
- Preparing for Data Conversion Analysis
- Running the SQL Rename Tool
- Modifying the Database Structure
- Loading Data for Data Conversion
- Applying Updates Before Data Conversion
- Running the Data Conversion Analyzer
- Backing Up Before Data Conversion
- Running Data Conversion
- Backing Up After Data Conversion
- Finalizing the Database Structure
- Loading Data to Complete System Setup
- Loading Stored Statements
- Running Final Update Statistics
- Updating Language Data
- Completing the PeopleTools Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports
- Restoring the New Release Demo

Understanding Application Changes

Earlier in the upgrade, you made various application changes. Now it is time to apply these application changes to your Copy of Production database.

Task 5-1: Running the New Release Upgrade Copy

This section discusses:

- Exporting Selected PeopleTools Tables
- Importing Selected PeopleTools Tables
- Copying the UPGCUST Project
- Reviewing Copy Results
- Swapping PeopleTools Tables
- Updating Target Values
- Copying the UPGIB Project
- Copying the UPGNONCOMP Project
- Reviewing Project Copy Results
- Exporting New Release Objects
- Importing New Release Objects
- Resetting Object Version Numbers

Task 5-1-1: Exporting Selected PeopleTools Tables

Depending on your upgrade path you will need to export one or more PeopleSoft PeopleTools tables to preserve values on your Copy of Production database. This step exports PeopleSoft PeopleTools tables in the Copy of Production before the upgrade copy has occurred.

The script for your upgrade path is:

```
DLUPX96E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-1-2: Importing Selected PeopleTools Tables

Depending on your upgrade path you will need to import one or more PeopleSoft PeopleTools tables to preserve values on your Copy of Production database. This step imports PeopleSoft PeopleTools tables into the Demo database before the upgrade copy occurs.

The script for your upgrade path is:

```
DLUPX96I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-1-3: Copying the UPGCUST Project

This step copies your customized PeopleSoft PeopleTools and application objects from the Copy of Production database to your Demo database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-1-4: Reviewing Copy Results

Review the results of the project copies that were performed in this task. For each of the projects copied, review the copy logs for any errors. Also, verify in PeopleSoft Application Designer that each of the projects copied shows the Done options are checked for those objects you expected to be copied.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. For example, if you chose not to copy a record definition, but neglected to deselect the PeopleCode Upgrade check box for that record, you will receive errors when trying to copy the PeopleCode. PeopleSoft Application Designer maintains PeopleSoft PeopleTools integrity during the copy and will not copy PeopleCode for records that do not exist.

Review any errors you receive during the copy process and determine whether they are acceptable cases or unacceptable errors that need correction. In the example above, either the PeopleCode error is acceptable because you do not intend to copy the record definition, or the error is unacceptable and you should copy the record and then copy the PeopleCode for that record again.

You may get messages similar to “Warning: FIELDNAME is a key field and has been appended to the end of the RECORDNAME record.” This is an acceptable message and you can ignore it.

The following error occurs when copying a Portal Registry Structure that has a different PORTAL_OBJNAME but the same PORTAL_URLTEXT as an existing registry object.

```
Duplicate Key. Portal: portalname, Obj name: objectname, CP: nodename, URL (1st 50⇒
 char): URL
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-1-5: Swapping PeopleTools Tables

This step swaps the base language for tables that contain PeopleSoft PeopleTools Managed Object data and related-language data on your Demo database. This is in preparation for the step, "Exporting New Release Objects." This script should only be run if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
PT_RELEASE_SWAP.DMS
```

If you would like to automate this step, follow the procedure below.

To make this step automated:

1. Select the step Swapping PeopleTools Tables in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	Non-English Base Language

Task 5-1-6: Updating Target Values

This step updates the Message Node table on the Demo database to keep the assignment of the Local Node defined in the Copy of Production. The update uses the copy of the Message Node table taken earlier in the upgrade.

The script for your upgrade path is:

```
DLUPX97.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-1-7: Copying the UPGIB Project

This step copies new release Integration Broker objects from the Demo database to your Copy of Production database. This step also deletes obsolete Integration Broker objects from your Copy of Production database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-1-8: Copying the UPGNONCOMP Project

In this step, copy the non-compare project, UPGNONCOMP. This project consists of object types you cannot compare and object types not included in your compare project. In a previous step, you reviewed this Oracle-delivered project and modified the Upgrade check box for any objects you did not want to copy.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-1-9: Reviewing Project Copy Results

Review the results of the UPGIB and UPGNONCOMP project copy steps that were performed earlier in this task. Review each copy log for any errors and verify in PeopleSoft Application Designer that the Done options are checked for the objects in each of the projects.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. Review any errors you received during the copy process to determine whether they are acceptable cases or unacceptable errors that need corrective action.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-1-10: Exporting New Release Objects

This step exports the new release objects and your customizations that you copied to the Demo database in an earlier step, to a file.

The script name for your upgrade path is:

```
PT_RELEASE_EXPORT.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-1-11: Importing New Release Objects

This step imports the new release objects and your customizations into your Copy of Production database.

The script name for your upgrade path is:

```
PT_RELEASE_IMPORT.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-1-12: Resetting Object Version Numbers

In this step, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Note. You will rerun the VERSION Application Engine program later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to manually rename the files after completing this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-2: Updating Database Overrides

This section discusses:

- Understanding Database Overrides
- Setting Index Parameters After Copy
- Setting Tablespace Names After Copy
- Creating New Tablespaces

Understanding Database Overrides

In this task, you update PeopleSoft PeopleTools tables with DDL information from your physical database DDL. You may have overwritten information about where tables exist in your database during the copy project steps of this upgrade. The following steps synchronize your PeopleSoft PeopleTools table definitions with your database again.

In the new release, certain tables have moved from 4K to 32K page size tablespaces. Make sure that these tables are created or altered in the 32K tablespaces. See the reference below for a complete list of tables.

See Appendix, "Reviewing Tablespaces."

Task 5-2-1: Setting Index Parameters After Copy

This step updates index overrides stored in the PSIDXDDLPARM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

```
SETINDEX.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	DB2 z/OS	All

Task 5-2-2: Setting Tablespace Names After Copy

This step updates tablespace names stored in the PSRECTBLSPC table. In addition, the values stored in the DDLSPACENAME field are updated with current values found in the system catalog. If you modified tablespace names from the delivered names, this process makes those same changes in the PeopleSoft system record definition. It also corrects any tablespace names that were reset with values from the Demo database during the copy project step. The process then lists any tablespaces defined in the PeopleSoft PeopleTools tables that are not currently on your database. Use this report to create new tablespaces later in this task. The name of the process is:

```
SETSPACE.SQR
```

Note. This step updates both the database and tablespace names in the PSRECTBLSPC table for DB2 z/OS sites. The report produced by this process lists database/tablespace combinations that were not defined in the DB2 system catalog. The report may show your Demo database and tablespace names instead of your Copy of Production database and tablespace names. You will correct this situation when you create new tablespaces.

See Creating New Tablespaces.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 5-2-3: Creating New Tablespaces

This section discusses:

- Prerequisites
- Creating Delivered Tablespaces
- Creating Custom Tablespaces

Prerequisites

Before you perform this step, you must make sure that your database administrator has created all new tablespaces that will be used in new tables.

Note. DB2 z/OS sites need to create databases as well as tablespaces at this time.

Creating Delivered Tablespaces

If you use delivered tablespace names, be aware that there may be new ones in this release. The report that you produced when you set tablespace names after copying provides a list of tablespaces that are missing from your database.

See Setting Tablespace Names After Copy.

You need to create all the tablespaces on the report listed as missing on the database. Once you create all the tablespaces, you can rerun the SETSPACE.SQR; the report should show that no additional modifications are needed.

Oracle delivered a shell SQL script containing the DDL commands to create all the delivered tablespaces. Edit the script to create just the new tablespaces and to set up the script for your environment.

The script supplied by Oracle to create tablespaces for your upgrade is:

- EPDDL.SQL for Oracle or DB2 z/OS ANSI
- EPDDLU.SQL for DB2 z/OS Unicode
- EPDDLDMS.SQL for DB2 UNIX/NT ANSI
- EPDDLDMSU.SQL for DB2 UNIX/NT Unicode
- EPDDL.SH for Informix

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.

Note. For DB2 z/OS only, some tables were reassigned to larger tablespaces because they now require a 32-KB buffer pool. You must manually edit the Create Table statements in the upgrade scripts to replace the tablespace names with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool.

DB2 z/OS sites must also consider how database names are assigned. After the upgrade/copy is completed, some of the PeopleSoft PeopleTools metadata tables in your Copy of Production database will contain the database values from the Demo database. Review the SETSPACE SQR report for those tables that are reported as not defined in the database. If the report shows your Demo database names instead of your Copy of Production database names you can reset them with the following SQL:

```
UPDATE PSRECTBLSPC SET DBNAME = 'Copy of Production dbname'
WHERE DBNAME = 'Demo dbname'
```

Creating Custom Tablespaces

If you will use custom tablespaces, create those tablespaces now. Choose one of the following two methods to get the information into PeopleSoft PeopleTools:

- Update PeopleSoft PeopleTools for each record you will put into a custom tablespace. You can do this directly through PeopleSoft Application Designer, or you can update PSRECTBLSPC directly by using the appropriate SQL for your site, as follows:

  DB2 z/OS sites:

  ```
  UPDATE PSRECTBLSPC
  SET DBNAME = 'new dbname', DDLSPACENAME = 'new tablespacename'
  WHERE DBNAME = 'current dbname'
  AND DDLSPACENAME = 'current tablespacename';
  ```

  All other sites:

  ```
  UPDATE PSRECTBLSPC
  SET DDLSPACENAME = 'new tablespacename'
  WHERE DDLSPACENAME = 'current tablespacename';
  ```

  To update each table individually, add the following clause to the predicate of the above statement, making sure you use the record name in this clause:

  ```
  AND RECNAME = record name
  ```

  The SETSPACE report contains the table name. The record name will not have the “PS_” prefix.

  You can double-check that you created all tablespaces by rerunning the SETSPACE.SQR report. If you created all tablespaces for records defined in PeopleSoft PeopleTools, the report will be empty.

- When you edit the Create and Alter scripts, you can change the SQL to create the tables in the correct tablespaces. Later in this task you will set tablespace names, which will update PeopleSoft PeopleTools with the correct tablespaces or database/tablespace in DB2 z/OS. The report should be empty at that time.

Note. For DB2 z/OS sites, the SETSPACE report may list some database/tablespace combinations as “Table Undefined - DB/TS OK” when in fact the database name is one that was defined for your Demo database. This occurs if your Demo and Copy of Production databases are in the same DB2 subsystem. The SETSPACE.SQR detected that the database/tablespace combinations do exist in the subsystem and are therefore valid. Make sure that you update these database/tablespace names to match those that exist in your Copy of Production, using the instructions above.

Note. During the Move to Production pass, you will create these tablespaces when you populate tablespace data. You can reuse this script, or you can create a new script for your production environment. To reuse the script you have created for this task, save it and copy it into the *PS_APP_HOME*\SCRIPTS directory that you use during the Move to Production pass.

See the PeopleTools installation guide for DB2 UDB for z/OS for your new release, "Creating a Database," Correcting Invalid Database/Tablespace Combinations.

See Modifying the Database Structure, Editing the Create and Alter Scripts.

See Modifying the Database Structure, Setting Tablespace Names.

See "Applying PeopleTools Changes," Populating Tablespace Data.

See "Applying Changes to the Production Database," Performing the Move to Production.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	Oracle Informix DB2 z/OS DB2 UNIX/NT	All

Task 5-3: Backing Up After the Upgrade Copy

This section discusses:

- Backing Up Your Database After Upgrade Copy
- Backing Up the New Release Demo Again

Task 5-3-1: Backing Up Your Database After Upgrade Copy

Back up your database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-3-2: Backing Up the New Release Demo Again

Back up your New Release Demo database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remainder of the tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-4: Configuring ChartFields

This section discusses:

- Understanding ChartFields
- Updating Inactive ChartFields
- Copying the UPG_CF_CONFIG Project Definition
- Building the UPG_CF_CONFIG Script
- Running the UPG_CF_CONFIG Script
- Copying the UPG_CF_RENAME Project Definition
- Building the UPG_CF_RENAME Script
- Running the UPG_CF_RENAME Script
- Exporting Configuration Defaults
- Importing Configuration Defaults
- Running the Configuration by Project Process
- Updating Asset Management ChartField SQC
- Exporting ChartField Configuration Data
- Importing ChartField Configuration Data

Understanding ChartFields

In this task you apply your existing ChartField configuration to the new PeopleSoft objects that have been copied into your database. You accomplish this by running the Configuration by Project process. The process dynamically creates the project UPG_CFDBCOMP containing the new objects, and uses this project in running ChartField Configuration by Project.

Since this task simply applies your existing configuration actions with a status of *Complete* to the new objects, you will also need to run the Full Configuration process after completing the upgrade, in the following cases:

- You need to make changes to your current PeopleSoft ChartField configuration that did not exist in the previous release (for example, activate an additional ChartField, or relabel a ChartField).

- You have licensed new products and you have not yet run the Full Configuration process to configure those products.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook* "Configuring ChartFields."

Task 5-4-1: Updating Inactive ChartFields

This step updates the PSDBFIELD table to reflect which ChartFields were previously active or inactive in your Copy of Production database before the upgrade.

The script name is for your upgrade is:

```
DLEPFAU40.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-4-2: Copying the UPG_CF_CONFIG Project Definition

This step copies the UPG_CF_CONFIG project definition from the Demo database to the Copy of Production database. This will only copy the project definition, not the objects in the project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-3: Building the UPG_CF_CONFIG Script

This step generates the UPG_CF_CONFIG.SQL script that contains SQL to alter existing tables. This SQL will create and alter tables, and create views.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-4: Running the UPG_CF_CONFIG Script

In this step, you run the UPG_CF_CONFIG.SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-5: Copying the UPG_CF_RENAME Project Definition

This step copies the UPG_CF_RENAME project definition from the Demo database to the Copy of Production database. This will only copy the project definition, not the objects in the project. This project contains records with the column FIELDNAME added in the new release to allow the CF Configuration process to perform a Rename ChartField action.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-6: Building the UPG_CF_RENAME Script

This step generates the UPG_CF_RENAME.SQL script that contains SQL to alter existing tables. This SQL will create and alter tables, and create views.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-7: Running the UPG_CF_RENAME Script

In this step, you run the UPG_CF_RENAME.SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-8: Exporting Configuration Defaults

This script exports ChartField configuration data from the Demo database. This data is considered system data that is needed for the ChartField configuration steps that follow. The script name for your upgrade path is:

```
DLCGFAQ19E.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-4-9: Importing Configuration Defaults

This script imports the ChartField configuration data into the Copy of Production database. The script name for your upgrade path is:

```
DLCGFAQ19I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-4-10: Running the Configuration by Project Process

This step runs the AE process UPG_CFCONFIG. This process applies all existing ChartField configuration actions on the FS_CF_ACT_LOG table with a CF_STATUS of *C* (Complete) to the objects in the UPG_CFDBCOMP project. The UPG_CFDBCOMP project is created by the process and contains records and pages containing configured ChartFields.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-4-11: Updating Asset Management ChartField SQC

This step runs the SQR AMCFBULD, which updates the file AMCHARTS.SQC. Once the process completes successfully, you will find a new AMCHARTS.SQC in your TEMP directory. Move AMCHARTS.SQC into your production SQR directory.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Asset Management	All	All

Task 5-4-12: Exporting ChartField Configuration Data

To avoid running the ChartField Configuration process again in the Move to Production passes, this step exports the data updated by this process from your first Copy of Production database. The script name for your path is:


```
MVCGGLM25E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 5-4-13: Importing ChartField Configuration Data

This script imports the ChartField Configuration data into the new Copy of Production Database. The script name for your path is:

```
MVCGGLM25I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 5-5: Modifying Trigger Tables

This section discusses:

- Understanding Modifying Trigger Tables
- Building the UPG_SPL_DELSYNCH Script
- Running the UPG_SPL_DELSYNCH Script
- Building the UPG_SPL_DELSYNCH2 Script
- Running the UPG_SPL_DELSYNCH2 Script
- Building the UPG_SPL_SYNCH Tables Script
- Running the UPG_SPL_SYNCH Tables Script
- Building the UPG_SPL_SYNCH Triggers Script
- Running the UPG_SPL_SYNCH Triggers Script
- Building the UPG_SPL_SYNCH2 Script
- Running the UPG_SPL_SYNCH2 Script

Understanding Modifying Trigger Tables

In this task, you re-create some tables on which the triggers on another set of tables depend. You must perform this particular task outside of the standard steps in the Modifying the Database Structure task, due to restrictions that the table naming conventions impose on the build order of these tables.

Task 5-5-1: Building the UPG_SPL_DELSYNCH Script

This step generates the SQL script to re-create a set of tables on which the triggers on another set of tables depend. The script name for your upgrade path is:

```
UPG_SPL_DELSYNCH_crttbl.sql
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-2: Running the UPG_SPL_DELSYNCH Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-3: Building the UPG_SPL_DELSYNCH2 Script

This step generates the SQL script to alter a set of tables on which the triggers on another set of tables depend. The script name for your upgrade path is:

```
UPG_SPL_DELSYNCH2_alttbl.sql
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-4: Running the UPG_SPL_DELSYNCH2 Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-5: Building the UPG_SPL_SYNCH Tables Script

This step generates the UPG_SPL_SYNCH_crttbl.sql script that contains SQL to re-create existing tables.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-6: Running the UPG_SPL_SYNCH Tables Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-7: Building the UPG_SPL_SYNCH Triggers Script

This step generates the UPG_SPL_SYNCH_crttrgr.sql script that contains SQL to re-create triggers on the tables that were created in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-8: Running the UPG_SPL_SYNCH Triggers Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-9: Building the UPG_SPL_SYNCH2 Script

This step generates the UPG_SPL_SYNCH2_alttbl.sql script that contains SQL to alter existing tables.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-10: Running the UPG_SPL_SYNCH2 Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-6: Preparing for Data Conversion Analysis

This section discusses:

- Populating the Initial Alter Analyzer Repository
- Populating the MTP Alter Analyzer Repository
- Copying the EOUF_UPGRADE_FRAMEWORK Project
- Building the EOUF_UPGRADE_FRAMEWORK Project
- Running the EOUF_UPGRADE_FRAMEWORK Script

Task 5-6-1: Populating the Initial Alter Analyzer Repository

This task runs the PTALTANLYZR Application Engine program. This program determines how the database structure is different between your current release and the new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-6-2: Populating the MTP Alter Analyzer Repository

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. This task runs the PTALTANLYZER Application Engine program for the Move to Production pass. This program determines how the database structure is different between your current release and the new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 5-6-3: Copying the EOUF_UPGRADE_FRAMEWORK Project

This step copies the EOUF_UPGRADE_FRAMEWORK project from the Source database to the Target database. The EOUF_UPGRADE_FRAMEWORK project contains all objects that need to exist in the database in order for the Data Conversion analyzer to run properly.

Run this step only in the Initial pass. The project is copied in the task Preparing for Application Changes during the Move to Production passes.

See "Running and Reviewing Compare Reports," Preparing for Application Changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-6-4: Building the EOUF_UPGRADE_FRAMEWORK Project

This step generates the SQL script to create and alter tables and views delivered in the EOUF_UPGRADE_FRAMEWORK project. The tables are altered to add new columns, rename existing columns, change columns that have modified properties, and delete columns. The script re-creates views and modified indexes. New indexes are also created.

The script for your upgrade path is:

```
EOUF_UPGRADE_FRAMEWORK.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-6-5: Running the EOUF_UPGRADE_FRAMEWORK Script

This step runs the script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-7: Running the SQL Rename Tool

This section discusses:

- Understanding the SQL Rename Tool
- Running the SQL Rename Tool for RNEPUPM01
- Running the SQL Rename Tool for RNEPUPM02
- Running the SQL Rename Tool for RNEPPLM01
- Running the SQL Rename Tool for RNEPPLM02

Understanding the SQL Rename Tool

In this task, the EOUFEXTRENAM Application Engine program populates the Alter Analyzer tables with additional information contained in the SQL scripts that you ran in the Renaming Tables task of the "Running and Reviewing Compare Reports" chapter. This information is used by EOUF0009.SQR to generate a Table Analysis Report.

See Appendix: “Using Data Conversion Utilities.”

Task 5-7-1: Running the SQL Rename Tool for RNEPUPM01

This step runs the EOUFEXTRENAM Application Engine program to populate the Alter Analyzer tables with information about tables renamed by the RNEPUPM01*xxx*.SQL script, where *xxx* represents the three-letter code for your RDBMS platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-7-2: Running the SQL Rename Tool for RNEPUPM02

This step runs the EOUFEXTRENAM Application Engine program to populate the Alter Analyzer tables with information about tables renamed by the RNEPUPM02*xxx*.SQL script, where *xxx* represents the three-letter code for your RDBMS platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT	All

Task 5-7-3: Running the SQL Rename Tool for RNEPPLM01

This section discusses:

- Understanding the SQL Rename Tool for RNEPPLM01
- Running the SQL Rename Tool for RNEPPLM01 Automatically
- Skipping the SQL Rename Tool for RNEPPLM01 Step

Understanding the SQL Rename Tool for RNEPPLM01

If you are upgrading from PeopleSoft FSCM 8.80 and you applied the PeopleSoft Supply Planning bolt-on or you are upgrading from PeopleSoft FSCM 8.8 SP1, proceed to "Running the SQL Rename Tool for RNEPPLM01 Automatically." The EOUFEXTRENAM Application Engine program will populate the Alter Analyzer tables with information about tables renamed by the RNEPPLM01xxx.SQL script, where xxx represents the three-letter code for your RDBMS platform.

If you are upgrading from PeopleSoft 8.80 and are implementing the PeopleSoft EPM Planning integration, proceed to "Skipping the SQL Rename Tool for RNEPPLM01 Step" for instructions on how to mark this task complete.

Running the SQL Rename Tool for RNEPPLM01 Automatically

Follow this procedure to edit your PeopleSoft Change Assistant template so that the step "Running the SQL Rename Tool for RNEPPLM01" can run automatically.

To run the step "Running SQL Rename Tool for RNEPPLM01" automatically:

1. In PeopleSoft Change Assistant, select the step "Running the SQL Rename Tool for RNEPPLM01."
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *ApplicationEngine*, and click OK.
4. Ensure that the step is still highlighted and select Edit, Run (or F4).

Skipping the SQL Rename Tool for RNEPPLM01 Step

If you are upgrading from PeopleSoft FSCM 8.80 and implementing the PeopleSoft EPM Planning integration, you do not need to run this script. Follow the procedure below to update your PeopleSoft Change Assistant job so that the step "Running the SQL Rename Tool for RNEPPLM01" will not be run.

To skip the step "Running the SQL Rename Tool for RNEPPLM01":

1. In PeopleSoft Change Assistant, select the step "Running the SQL Rename Tool for RNEPPLM01."
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-7-4: Running the SQL Rename Tool for RNEPPLM02

This section discusses:

- Understanding the SQL Rename Tool for RNEPPLM02
- Running the SQL Rename Tool for RNEPPLM02 Automatically
- Skipping the SQL Rename Tool for RNEPPLM02 Step

Understanding the SQL Rename Tool for RNEPPLM02

If you are upgrading from PeopleSoft FSCM 8.80 and you applied the PeopleSoft Supply Planning bolt-on or you are upgrading from PeopleSoft FSCM 8.8 SP1, proceed to "Running the SQL Rename Tool for RNEPPLM02 Automatically." The EOUFEXTRENAM Application Engine program will populate the Alter Analyzer tables with information about tables renamed by the RNEPPLM02*xxx*.SQL script, where *xxx* represents the three-letter code for your RDBMS platform.

If you are upgrading from PeopleSoft FSCM 8.80 and are implementing the PeopleSoft EPM Planning integration, proceed to "Skipping the SQL Rename Tool for RNEPPLM02 Step" for instructions on how to mark this task complete.

Running the SQL Rename Tool for RNEPPLM02 Automatically

Follow this procedure to edit your PeopleSoft Change Assistant template so that the step "Running the SQL Rename Tool for RNEPPLM02" can run automatically.

To run the step "Running the SQL Rename Tool for RNEPPLM02" automatically:

1. In PeopleSoft Change Assistant, select the step "Running the SQL Rename Tool for RNEPPLM02."
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *ApplicationEngine*, and click OK.
4. Ensure that the step is still highlighted and select Edit, Run (or F4).

Skipping the SQL Rename Tool for RNEPPLM02 Step

If you are upgrading from PeopleSoft FSCM 8.80 and implementing the PeopleSoft EPM Planning integration, you do not need to run this script. Follow the procedure below to update your PeopleSoft Change Assistant job so that the step "Running the SQL Rename Tool for RNEPPLM02" will not be run.

To skip the step "Running the SQL Rename Tool for RNEPPLM02":

1. In PeopleSoft Change Assistant, select the step "Running the SQL Rename Tool for RNEPPLM02."
2. Select Edit, Complete (or F7).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT	All

Task 5-8: Modifying the Database Structure

This section discusses:

- Understanding Modifying the Database Structure
- Backing Up for DB2
- Building the Upgrade Tables Script
- Re-Creating Upgrade Tables
- Creating the Upgrade Projects
- Building the Alter Temporary Tables Script
- Building the Optional Temporary Tables Script
- Creating the ALLTEMPTABS Project
- Building the Create Temporary Tables Script
- Creating the ALLTABS Project
- Building the Create and Alter Scripts
- Recycling Tablespace Version Numbers
- Editing the Create and Alter Scripts
- Re-Creating Required Temporary Tables
- Re-Creating Optional Temporary Tables
- Creating Temporary Tables
- Creating Tables
- Altering Tables
- Creating Indexes
- Re-Creating Triggers
- Reviewing Tablespace and Index States
- Reviewing the Create Indexes Log
- Dropping Indexes for Data Conversion
- Creating Indexes for Data Conversion

- Creating Upgrade Views
- Setting Index Parameters
- Setting Temporary Table Tablespace Names
- Setting Tablespace Names
- Generating the DB2 UNIX RUNSTATS Script
- Updating Statistics for DB2 UNIX
- Updating Statistics for DB2 zOS
- Updating Statistics for Informix
- Updating Statistics for Oracle

Understanding Modifying the Database Structure

In this task you create and run various scripts and processes that will modify your database structure, including creating new tables and indexes, altering tables that have changed, and re-creating modified indexes.

Note. In the PeopleSoft Change Assistant job, some of the steps may complete without error, but display a Warning icon indicating that warning messages exist in the log file.

See the PeopleTools: Change Assistant PeopleBook for your new release, “Error Handling.”

Task 5-8-1: Backing Up for DB2

If you are using the DB2 z/OS platform, back up your database now. This enables you to restart your upgrade from this point if you should experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	DB2 z/OS	All

Task 5-8-2: Building the Upgrade Tables Script

This step generates the SQL script to drop and re-create all the tables in the project named UPGCONVERT. These tables will be used during data conversion by Application Engine programs. They can be safely dropped at this time because they do not contain application data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCONVERT_CRTTBL.SQL
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-3: Re-Creating Upgrade Tables

This step runs the SQL script you generated to re-create all the tables in the project named UPGCONVERT.

The script name for your upgrade path is:

```
UPGCONVERT_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-4: Creating the Upgrade Projects

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

In this step, you run the EOUFPOPPROJ Application Engine program. This program generates multiple project definitions and inserts record definitions into the generated projects in your Copy of Production database. Later in the upgrade, create and alter SQL scripts are generated for each of the projects created in this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-5: Building the Alter Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step generates the SQL script to drop and re-create the records of the type Temporary Table in the UPGCRTTMPTBL project. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCRTTMPTBL_CRTTBL.SQL
```

Note. This step is required.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-6: Building the Optional Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step generates a SQL script to drop and re-create the Temporary Table record type in the UPGCRTTMPTBLOPT project. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCRTTMPTBLOPT_CRTTBL.SQL
```

Note. This step is optional.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-7: Creating the ALLTEMPTABS Project

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step creates a project named ALLTEMPTABS and inserts all records of the type *Table*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-8: Building the Create Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step generates the SQL script to drop and re-create all the records of type Temporary Table in the database. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:


```
ALLTEMPTABS_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-9: Creating the ALLTABS Project

This step creates a project named ALLTABS and inserts all records of the type *Table*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-10: Building the Create and Alter Scripts

This step generates the SQL script to create all new records of the type *Table*. The script name is:

```
ALLTABS_CRTTBL.SQL
```

This step generates the SQL script to alter all existing records of the type *Table*. This script is referred to as Alter Without Deletes. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Columns that will eventually be deleted will still exist on the tables after this script is executed. The script name is:

```
ALLTABS_ALTTBL.SQL
```

This step also generates the SQL script to create new indexes and to re-create modified indexes as needed for the tables in the first two scripts. The script name is:

```
ALLTABS_CRTIDX.SQL
```

Note. This step also creates the script ALLTABS_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, because all database triggers will be created in the "Finalizing the Database Structure" task.

Note. For DB2 z/OS sites, if this step takes an exceptionally long time, performing a RUNSTATS on the system catalog tablespace SYSDBASE may improve performance.

See Finalizing the Database Structure.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-11: Recycling Tablespace Version Numbers

The PeopleSoft PeopleTools alter processing for DB2 z/OS was designed to prevent DB2 from creating an excessive number of tablespace versions by carefully controlling which table alters are committed per tablespace. However, it is possible that DB2 may still create the maximum number of tablespace versions when running the alter script if there are shared tablespaces already close to the maximum 255 version numbers.

To minimize the possibility that the alter script will stop with SQL code -4702 (exceeding the maximum number of tablespace versions), find any tablespaces that may be close to the maximum allowed version number and run the Reorg Tablespace and Modify Recovery utilities.

See the PeopleTools: Data Management PeopleBook for your new release, Administering PeopleSoft Databases on DB2 UDB for z/OS, "Working with Alters on DB2 z/OS."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-8-12: Editing the Create and Alter Scripts

In this step, you will edit the SQL create and alter scripts for tablespace names and sizing. The script names for your upgrade path are:

```
ALLTABS_CRTTBL.SQL
ALLTABS_ALTTBL.SQL
ALLTABS_CRTIDX.SQL
```

The following scripts may or may not appear in your database. If these are present, edit them for tablespace names and sizing:

```
UPGCRTTMPTBL_CRTTBL.SQL
UPGCRTTMPTBLOPT_CRTTBL.SQL
ALLTEMPTABS_CRTTBL.SQL
```

If you are not using the PeopleSoft tablespace names, you will need to review and modify the scripts above. When the new record was copied to the Copy of Production database, the PeopleSoft default tablespace name was copied as well. When you performed the step, "Creating New Tablespaces," you were given the option to correct the tablespace names online or to wait and edit the scripts. After you have completed running these scripts you will run the programs that synchronize the PeopleSoft PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleSoft PeopleTools definition. Have your database administrator review these scripts and modify the tablespace names appropriately.

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors. After the upgrade is complete, you may want your database administrator to review and make adjustments to the amount of free space left in some of the tables or tablespaces.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 5-8-13: Re-Creating Required Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step runs the SQL script you generated to create records of the type *Temporary Table* in the UPGCRTTMPTBL project. The script name for your upgrade path is:

```
UPGCRTTMPTBL_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-14: Re-Creating Optional Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step runs the SQL script generated to create records of the type *Temporary Tables* in the UPGCRTTMPTBLOPT project.

The script name for your upgrade path is:

```
UPGCRTTMPTBLOPT_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-15: Creating Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step runs the SQL script you generated to create all the records of the type *Temporary Table*. The script name for your upgrade path is:

```
ALLTEMPTABS_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-16: Creating Tables

This step runs the SQL script you generated to create all the records of the type *Table*. This step creates new table structures in your database. The script name for your upgrade path is:

```
ALLTABS_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-17: Altering Tables

This step runs the SQL script you generated to alter the existing records of type *Table*. This step alters existing PeopleSoft table structures to comply with your new PeopleSoft release.

The script name for your upgrade path is:

```
ALLTABS_ALTTBL.SQL
```

Note. PeopleSoft Change Assistant disables auto-commit when it runs SQL scripts. This is designed to prevent DB2 from creating an excessive number of tablespace versions.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-18: Creating Indexes

This step runs the SQL script you generated to create indexes on records of the type *Table*. This step creates or modifies indexes as required.

The script name for your upgrade path is:

```
ALLTABS_CRTIDX.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-19: Re-Creating Triggers

This step executes the script CREATETRGR.DMS, which will re-create all PeopleSoft triggers in the database. The triggers on PeopleSoft tables were invalidated when the tables were altered and need to be re-created.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 5-8-20: Reviewing Tablespace and Index States

After altering tables, DB2 may have placed tablespaces or indices in either an Advisory Reorg Pending (AREO*) or Rebuild Pending (RBDP) status depending on the nature of the change made to a particular table. Run the DB2 display database command to find any tablespaces or indices with either status. Resolve any AREO* or RBDP states by running the DB2 Reorg Tablespace utility before continuing with the upgrade.

See the PeopleTools: Data Management PeopleBook for your new release, Administering PeopleSoft Databases on DB2 UDB for z/OS, “Working with Alters on DB2 z/OS.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-8-21: Reviewing the Create Indexes Log

When PeopleSoft Change Assistant runs the create indexes script to create indexes, it will not stop when it encounters errors. When you view the log file, you will see that some indexes cannot be created due to unique index constraints. The data causing those indexes to fail will be updated during the task, “Running Data Conversion.” The indexes will then create successfully during the task, “Finalizing the Database Structure.”

Review the errors in the log file. Unique constraint errors are acceptable. If you see any other types of index creation errors, such as space problems, you must correct them before you continue with the upgrade. If you do not correct the errors, it may degrade your performance during data conversion.

The log file name for your upgrade path is:

```
ALLTABS_CRTIDX.LOG
```


See Running Data Conversion.

See Finalizing the Database Structure.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-22: Dropping Indexes for Data Conversion

Drop the following indexes using the SQL tool of your choice. These tables are changing key structure and data conversion cannot update the new columns if these old indexes exist. Some of these indexes may not exist because they did not create in the earlier "Creating Indexes" step. This is acceptable.

Table Name	Index Name
PS_PL_CYCLE_DTL_RQ	PS_PL_CYCLE_DTL_RQ

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-23: Creating Indexes for Data Conversion

During this step, you will create indexes to improve performance during data conversion. These indexes are only used for the purposes of data conversion. They are not required for regular operation of the products, therefore they were not created in previous steps nor are they delivered with the record definitions on the Demo database. In this step you are asked to manually create those indexes that apply to you (not using PeopleSoft Application Designer).

It is important to follow the following naming convention so that the Alter with Deletes script you run in the task "Finalizing the Database Structure" will drop these indexes automatically. Use PS[X]Record Name where X is any letter A-Z. For example, if you have to create an index for table PS_COUNTRY_TBL a proper index name would be PSUCOUNTRY_TBL. If an additional index is required for that same table, you can then name it (for example) PSYCOUNTRY_TBL. However, it is important to ensure that the new name of the index you are creating is not defined in the database already.

Not all listed indexes are required for all customers. Reading the comments with each listed index will help you determine if the index is applicable to your specific upgrade. Work with your database administrator to create a script that will build the indexes in your Copy of Production. You can then modify the PeopleSoft Change Assistant template to automate this step (for the initial pass and all future passes too). To do that, go to the Upgrade Template view, then right-click on the step and edit the step properties. Add your script name, without the file extension, in the Script/Procedure field and change the Type to SQL Script.

After reading the comments to determine whether the index is applicable to your situation, create or modify the following indexes in your Copy of Production database:

Table	With Columns	Comments
PS_BI_LINE	ORDER_NO BUSINESS_UNIT_OM ORDER_INT_LINE_NO SCHED_LINE_NBR	This index should be non-unique.
PS_CM_ACCTG_LINE	TRANSACTION_GROUP BUSINESS_UNIT_OM BUSINESS_UNIT ORDER_NO ORDER_INT_LINE_NO SCHED_LINE_NO INV_ITEM_ID SEQ_NBR SHIP_ID CHARGE_TYPE CM_BOOK	This index should be non-unique. This improves the performance of the data conversion code where BUSINESS_UNIT_OM has been added as an additional key on CM_ACCTG_LINE.
PS_CM_DEPLETE	BUSINESS_UNIT INV_ITEM_ID DT_TIMESTAMP SEQ_NBR	This index should be non-unique. It prevents full table scan during insertion into table CM_UNDEPLETE.
PS_COMMENTS_TBL	COMMENT_ID RANDOM_CMMT_NBR	This index should be non-unique. It will significantly improve performance for step PVT80.
PS_CUST_CONVER_DTL	CONVR_QUALIFIER_CD BUSINESS_UNIT CUST_ID CONVR_QUAL_FIELD ITEM_LINE	This index should be non-unique. ARM05 will use this table to update all ITEM records where a CUST_CONVER_DTL exists. (CONVR_QUAL_FIELD is ITEM when CONV_QUALIFIER_CD = ‘I’).
PS_INTFC_BI	ORDER_NO BUSINESS_UNIT_OM ORDER_INT_LINE_NO SCHED_LINE_NBR	This index should be non-unique.

Table	With Columns	Comments
PS_INTFC_BI_CMP	BUSINESS_UNIT_OM ORDER_NO ORDER_INT_LINE_NO SCHED_LINE_NBR TRANS_TYPE_BI	This index should be non-unique.
PS_KK_SOURCE_HDR	KK_SOURCE_TRAN BUSINESS_UNIT PO_ID KK_TRAN_ID KK_TRAN_DT	This index should be non-unique.
PS_MASTER_ITEM_TBL	INV_ITEM_ID	This index should be non-unique. Field INV_ITEM_ID on table MASTER_ITEM_TBL is used in joins and selects throughout the data conversion code.
PS_PO_COMMENTS	BUSINESS_UNIT PO_ID LINE_NBR SCM_ATTACH_ID COMMENT_TYPE COMMENT_ID	This index should be non-unique. It will significantly improve performance for step PVT80.
PS_PYMNT_ADVICE	BANK_SETID BANK_CD BANK_ACCT_KEY PYMNT_ID	This index should be non-unique. It will significantly improve performance for step APK01-A.Step02.
PS_SF_OUTPUT_LIST	BUSINESS_UNIT PRODUCTION_ID	This index should be non-unique. These fields are used to populate the main loop table used in the Product Configurator pegging update conversion.
PS_SF_PRDNID_HEADR	BUSINESS_UNIT PRODUCTION_ID PROD_STATUS	This index should be non-unique. Fields BUSINESS_UNIT, PRODUCTION_ID, and PROD_STATUS on table SF_PRDNID_HEADR are used in multiple updates in the Manufacturing data conversion code for Yield by Operation functionality.

Table	With Columns	Comments
PS_SF_PRDNID_HEADR	BUSINESS_UNIT PRODUCTION_ID PROD_STATUS BUSINESS_UNIT_OM ORDER_NO ORDER_INT_LINE_NO	This index should be non-unique. These fields are used to populate the main loop table used in the Product Configurator pegging update conversion.
PS_SUT_DFLT_TBL	SUT_APPL_FLG	This index should be non-unique. The translate values for field SUT_APPL_FLG on table SUT_DFLT_TBL has been changed.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-24: Creating Upgrade Views

This step will create the views included in the project definition UPGVIEWS. These views are only needed for the manual setup tasks between here and running data conversion as well as data conversion itself.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-8-25: Setting Index Parameters

This step updates index overrides stored in the PSIDXDDLPARM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

```
SETINDEX.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-8-26: Setting Temporary Table Tablespace Names

This step populates the PeopleSoft PeopleTools table PSRECTBLSPC with the table name, database name, and tablespace name information for the temporary table instances created on the database in a previous step. This information will be required by processes that perform in-stream RUNSTATS (%UpdateStats) on the temporary table instances. The name of the process is:

```
SETTMPIN.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-8-27: Setting Tablespace Names

This step populates all tablespace information in the PSRECTBLSPC table. The values stored in the DDLSPACENAM field are updated with current values found in the system catalog. If you modified tablespace names when you edited the SQL script that created your new tables from the delivered names, this will make those same changes in the PeopleSoft record definition. The name of the process is:

```
SETSPACE.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 5-8-28: Generating the DB2 UNIX RUNSTATS Script

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update the statistics on DB2 UNIX/NT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 5-8-29: Updating Statistics for DB2 UNIX

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again. Run the RUNSTATS.SQL script created in the previous step to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 5-8-30: Updating Statistics for DB2 zOS

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-8-31: Updating Statistics for Informix

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 5-8-32: Updating Statistics for Oracle

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 5-9: Loading Data for Data Conversion

This section discusses:

- Swapping Languages on System Data
- Exporting Application Messages
- Importing Application Messages
- Exporting Record Groups
- Importing Record Groups
- Exporting the System Setup Data
- Importing the System Setup Data
- Exporting the PW Pagelet Data
- Importing the PW Pagelet Data
- Exporting the Pagelet Wizard Data
- Importing the Pagelet Wizard Data
- Exporting the Feed Data
- Importing the Feed Data
- Exporting Upgrade Defaults
- Importing Upgrade Defaults
- Exporting Application Data
- Importing Application Data
- Exporting Data Conversion Driver Data
- Importing Data Conversion Driver Data

Task 5-9-1: Swapping Languages on System Data

This script swaps the base language for tables that contain system data on your Demo database and have related-language data, in preparation for the system data exports in the next step. This script should be run only if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
DLEPLASWAP.DMS
```

If you want to make this step automated, follow the steps below.

To make this step automated:

1. Select the step Swapping Languages on System Data in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	Non-English Base Language

Task 5-9-2: Exporting Application Messages

This step exports Application Messages data from the Demo database. The script name for your upgrade path is:

```
DLUPX01E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-9-3: Importing Application Messages

This step imports Application Message data into your Copy of Production database. Message Sets 0-999 are overlaid during the PeopleSoft PeopleTools Upgrade. Application Message Sets 1000-19,999 are overlaid with this task. If you have added custom messages in this set range, you must add those messages again at the end of the upgrade. To prevent this from happening in future maintenance or upgrades, add your custom messages in a set range of 20,000 or greater.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

```
DLUPX01I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-9-4: Exporting Record Groups

This step exports Record Group data from the Demo database. The script name for your upgrade path is:

```
DLUPX02E.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-9-5: Importing Record Groups

This step imports Record Group data and populates Set Control data in your Copy of Production database. The following records are related to Record Groups and Set Control data:

- REC_GROUP_REC
- REC_GROUP_TBL
- SET_CNTRL_TBL
- SET_CNTRL_GROUP
- SET_CNTRL_REC
- SETID_TBL

The import script deletes from, and then reloads, the Record Group tables, REC_GROUP_REC and REC_GROUP_TBL. These are the tables that are modified when you use PeopleTools, Utilities, Administration, Record Group. The script then rebuilds the related setID tables, PS_SET_CNTRL_GROUP and PS_SET_CNTRL_REC. The PS_SET_CNTRL_TBL and PS_SETID_TBL tables contain the setIDs you use in your system; this script does not update PS_SET_CNTRL_TBL. However, it does check for orphan setID references in PS_SET_CNTRL_REC and adds the missing setIDs to PS_SETID_TBL.

If you have moved an Oracle-delivered record into a custom added record group, and deleted the record from the Oracle-delivered record group, this script will put the record back into the Oracle-delivered record group and remove it from the custom added record group.

If you have created a new record group, it will be deleted in this step if all of its records are assigned to Oracle-delivered record groups in the new release. To continue using your custom record group, you will need to re-create it in the Reapplying Customizations task.

This script creates an output file and uses it to create a temporary table. To run successfully, the PeopleSoft Configuration Manager input and output PeopleSoft Data Mover directories should be the same.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

```
DLUPX02I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-9-6: Exporting the System Setup Data

This script exports the contents of the Message, Strings, Stored Statements, Record Group, data conversion driver, EDI, and Mass Change tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran other scripts to load this data and in some cases had to reapply customizations. This script exports the entire contents of these tables, including customizations, so that you will not need to reapply them after the Move to Production. The script name for your upgrade path is:

```
MVAPPEXP.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 5-9-7: Importing the System Setup Data

This script imports the data exported in the previous step into your New Copy of Production database during your Move to Production passes. This script replaces many scripts that you ran in the initial pass. It will move all data in these tables so that any customizations you have added to these tables during your initial pass will be moved to your New Copy of Production database. Also, it will rebuild the Set Control tables using the Record Groups from the Copy of Production database and your current Set Control values on the New Copy of Production database. The script name for your upgrade path is:

```
MVAPPIMP.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 5-9-8: Exporting the PW Pagelet Data

This script exports the application-specific Pagelet Wizard pagelet definition, header, footer, and category tables from the Demo database in the initial pass. The script name for your upgrade path is:

```
DLUPX14E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-9-9: Importing the PW Pagelet Data

This script imports the application-specific data for the Pagelet Wizard pagelet definition, header, footer, and category tables into your Copy of Production database during the initial pass. This data is needed for the data conversion. The script name for your upgrade path is:

```
DLUPX14I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-9-10: Exporting the Pagelet Wizard Data

This script exports the contents of the Pagelet Wizard tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran programs and scripts to load this data and, in some cases, had to make changes. This script exports the entire contents of these tables, including changes, so that you will not need to reapply them after the Move to Production. This data is needed for the data conversion. The script name for your upgrade path is:

```
MVUPX16E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 5-9-11: Importing the Pagelet Wizard Data

This script imports the Pagelet Wizard tables from the Copy of Production database into the New Copy of Production during your Move to Production passes. This script replaces processes that you ran in the initial pass. It will move all data in the affected tables so that any changes you have made during your initial pass will be moved to your New Copy of Production database. This data is needed for the data conversion. The script name for your upgrade path is:

```
MVUPX16I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 5-9-12: Exporting the Feed Data

This script exports the application-specific Feed Definitions, Feed Data Type Definitions, and other Feed-related system data from the Demo database in the initial upgrade pass. The script name for your upgrade path is:

```
PTUPGPTFPEXP.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-9-13: Importing the Feed Data

This script exports the application-specific Feed Definitions, Feed Data Type Definitions, and other Feed-related system data into your Copy of Production database during the initial upgrade pass. The script name for your upgrade path is:

```
PTUPGPTFPIMP.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-9-14: Exporting Upgrade Defaults

This script exports the upgrade default data values and mapping during your Move to Production passes. This is the data that you set up during the chapter "Preparing Your Database for Upgrade" of your initial upgrade pass. You will load this information into your New Copy of Production later in the Move to Production upgrade pass. The script name for your upgrade path is:

```
MVEP88EXP.DMS
```

See "Preparing Your Database for Upgrade."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 5-9-15: Importing Upgrade Defaults

This script imports the upgrade default data values and mapping that you set up during the chapter "Preparing Your Database for Upgrade," of your initial upgrade pass. The script name for your upgrade path is:

```
MVEP88IMP.DMS
```

See "Preparing Your Database for Upgrade."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 5-9-16: Exporting Application Data

This script exports data from the Source database for various application system data tables. The script name for your upgrade path is:

```
DLEPUPM33E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 5-9-17: Importing Application Data

This script imports data into your Copy of Production database. These tables are various application system data tables that contain data required for some data conversion programs. The remaining application system data will be loaded after tables are altered to delete obsolete columns. The script name for your upgrade path is:

```
DLEPUPM33I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-9-18: Exporting Data Conversion Driver Data

This step exports data conversion Application Engine driver data from the Demo database. The script name for your upgrade path is:

```
DLUPX03E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-9-19: Importing Data Conversion Driver Data

This step imports data conversion Application Engine driver data into your Copy of Production database.

The script name for your upgrade path is:

```
DLUPX03I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-10: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your Demo database. Now you should check My Oracle Support again for any new postings, and apply them now.

This is just one place that you can apply updates. There are other places in the upgrade process where applying updates may be applicable as well. How you apply the update varies depending on where you are in the upgrade.

See Appendix: "Applying Fixes Required for Upgrade."

Important! Apply all fixes listed under the product line/release, even if you have not licensed the product the fix is listed under. There are many interdependencies between products and database objects. If you do not apply the fix, you may be introducing another error in a different area of the conversion code.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade Change Packages using the "Download Change Package" functionality in PeopleSoft Change Assistant.
2. Use PeopleSoft Change Assistant to install and apply the updates into your Demo database for this upgrade pass. Review the documentation included with each update prior to applying the update.

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release.
3. The project is now loaded on your Demo database. You should run a project compare to make sure the objects in the fix will not overwrite any of your customizations. If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.
4. If you are performing a Move to Production upgrade pass, first migrate the Change Packages into the Source database for this upgrade pass. If needed, first set up PeopleSoft Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the Change Package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply it to the Source database.

   See the PeopleTools: Change Assistant PeopleBook for your new release, "Applying Updates."
5. Migrate the Change Packages into the Target database for this upgrade pass. If needed, first set up PeopleSoft Change Assistant with the environment information for your Target database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-11: Running the Data Conversion Analyzer

In this task, you will run the EOUFANALYSIS Application Engine program. This program performs a detailed analysis of the data conversion code within the MAIN data conversion group for your upgrade path to determine the Source and Target Tables used in each Application Engine step. The data generated by this process is used later in the upgrade to calculate the table dependencies between the data conversion sections that are executed at runtime. Review the log file for any warnings or issues that were encountered in analyzing the data conversion code. Review the log file for any warnings regarding SQL that the analyzer was unable to process. You may want to resolve issues on customized data conversion to improve the performance of data conversion.

See Appendix: "Using Data Conversion Utilities."

See Running Data Conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-12: Backing Up Before Data Conversion

Back up your database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remainder of the tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-13: Running Data Conversion

This section discusses:

- Understanding Data Conversion

- Reviewing Data Conversion Tips
- Turning Trace On
- Performing Data Conversion Concurrently
- Turning Trace Off

Understanding Data Conversion

In this task you will populate new tables and columns. Earlier, you altered tables and added all new and modified columns. You did not, however, remove obsolete columns. The following steps will move data from the obsolete columns to the new columns and tables. Later in this chapter, in the task "Finalizing the Database Structure," you will generate and run SQL to delete those obsolete columns.

Task 5-13-1: Reviewing Data Conversion Tips

This section discusses:

- Reviewing the Upgrade Driver Programs
- Using the Data Conversion Documentation
- Writing Data Conversion for Your Non-Oracle Records
- Reviewing Data Conversion Errors Expected During the Initial Upgrade Pass
- Restarting Data Conversion

Reviewing the Upgrade Driver Programs

UPG_DATACONV is an Application Engine program designed to run upgrade data conversions that are defined in the PRE and POST data conversion groups. Each time the program is run during an upgrade pass, PeopleSoft Change Assistant passes a group number parameter to the program. The program then reads the table PS_UPG_DATACONV, selecting all rows with that group number and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. You can review the sections that are called by the Upgrade Driver program by accessing the Define Upgrade Drivers page on the Demo database.

EOUFDATACONV is an Application Engine program designed to run upgrade data conversions that are defined in PS_UPG_DATACONV for the MAIN data conversion group. However, unlike UPG_DATACONV, EOUFDATACONV leverages dependency analysis to optimize the runtime of the data conversion. Multiple instances of the EOUFDATACONV Application Engine program are designed to be run in parallel to execute against a single set of dependency information.

Using the Data Conversion Documentation

Each section called by the Upgrade Driver program contains comments describing the underlying conversion. By running the UDATACNV.SQR report you can find which sections are called by the Upgrade Driver program and what they are doing.

See Appendix: "Using Data Conversion Utilities."

Writing Data Conversion for Your Non-Oracle Records

The data conversion code delivered for this upgrade was written to handle only Oracle-delivered records. You may have added your own records to the system. To convert data in the underlying tables, you may need to create your own Application Engine library. The Upgrade Driver program can call an Application Engine library section that you create. To have the Upgrade Driver program call your custom section during this task, you will need to add the section on the Define Upgrade Drivers page.

See Appendix: "Using Data Conversion Utilities."

Reviewing Data Conversion Errors Expected During the Initial Upgrade Pass

During your initial upgrade pass you can expect to have data conversion programs fail. This is because your PeopleSoft software installation is unique, which makes it difficult to write data conversions that will work for everyone all of the time. Your database may be larger than most, you may have customized Oracle-defined records, or you may not have copied all object deletions onto your Copy of Production. These differences will cause data conversion to fail. You must fix each problem on your initial Copy of Production and restart the Application Engine program. Your fixes will be automatically copied to your New Copy of Production during the Move to Production passes and data conversion will run smoothly.

If you have customized records that are delivered from Oracle, you may need to make changes to the Application Engine programs to handle these customizations. For example, here are two situations in which you may need to customize data conversion code:

- If you added fields to an Oracle-delivered record, you may need to add your additional fields to the conversion code for those records.
- If an Oracle-delivered record that you customized will be deleted, you may need to add your own conversions to move the data to a new location.

Use the Find In feature of PeopleSoft Application Designer to determine which Application Engine programs affect your customized records.

To use the Find In feature:

1. Create a project and add all Application Engine programs and related objects that have a name starting with *UPG* and save the project.
2. Select Edit, Find In.
3. Enter each customized record name in the Find What field and your project name in the Project field.
4. Click Find.

   The results will appear in the output window.

Document any changes you make to data conversion programs. This way, if a new version of the program is delivered on My Oracle Support, you will know exactly what changes you have made. You can then reapply the changes to the new version of the program.

If your database is large, you may have data conversion programs that fail due to running out of space as you move data from one table to another. This problem can happen on all RDBMS platforms, but is more of a problem on those platforms using tablespaces. If your data conversion terminates abnormally with a space error, examine the Application Engine SQL statements that caused the problem. Determine where the data is coming from and how much will be moved. Have your database administrator adjust the allocated space accordingly. The data conversion can then be restarted.

If you get a data conversion error because a field does not exist on a table, and the field is not one you have customized, check your field renames. If a field that appears on a record that is deleted in the new PeopleSoft release but was not deleted in your compare and copy, your table will be out of sync with what is expected by data conversion. If you had deleted the record, the rename would not happen on the physical table and the field would have the old name. This is what the data conversion program expects. If you did not delete the record, the field was renamed during the altering of tables and the data conversion program will terminate abnormally. Edit the Application Engine SQL to use the name, which is now on your table, and then restart the data conversion.

If you receive the following warning and your data conversion has completed successfully, the Application Engine step has used the base temp table:

```
WARNING: NO DEDICATED INSTANCES AVAILABLE FOR <recname> - USING BASE TABLE
```

To avoid this warning in subsequent upgrade passes, increase the number of temp table instances in the affected Application Engine program properties dialog box to be equal to or greater than the number of data conversion threads that you are running.

See Appendix: “Using the Comparison Process.”

Restarting Data Conversion

Processes run through the PeopleSoft Change Assistant Application Engine step type, do not automatically rename the old log files on restart. Therefore, before restarting a data conversion step that is run through the PeopleSoft Change Assistant Application Engine step type, rename the log file. PeopleSoft Change Assistant uses the same log file name each time you start or restart an Application Engine program. This means that the restarted Application Engine program will replace the original log file if it is not renamed.

Processes run through the PeopleSoft Change Assistant Process Scheduler step type, automatically rename the old log files and create a new log file on restart. The PeopleSoft Change Assistant Log Viewer only displays the logs from the current run process. However, logs from the previous (unsuccessful) runs are retained and accessible in the PeopleSoft Change Assistant Log Directory.

If your data conversion program fails, fix the problem on your Copy of Production and restart the program. When you set the data conversion step to Restart in your PeopleSoft Change Assistant job, it will rerun the program using the PROCESS_INSTANCE and RUN_CNTL_ID from the initial run and the conversion will restart right after the last committed SQL command. Application Engine keeps track of data committed to the database in the table PS_AERUNCONTROL, keyed by PROCESS_INSTANCE and RUN_CNTL_ID.

See Finalizing the Database Structure.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-13-2: Turning Trace On

Set the Application Engine tracing level to include TraceAE = 16384 for the Process Scheduler prior to running data conversion. This allows details on Application Engine execution time for SQL steps and PeopleCode SQL statements to be collected. This information can be analyzed and used to tune long-running data conversion steps, as reported through EOUF0005.SQR.

See Appendix: “Using Data Conversion Utilities,” Understanding EOUFDATACONV Reporting.

See the PeopleTools: Application Engine PeopleBook, Tracing Application Engine Programs.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-13-3: Performing Data Conversion Concurrently

This step runs the EOUFDATACONV Application Engine program for the MAIN data conversion group. After this step completes, you may want to run additional optional reports to obtain information about the data conversion such as execution and duration timings to help you optimize data conversion for your next upgrade pass.

See Appendix: "Using Data Conversion Utilities," Reviewing EO Upgrade Framework Reporting.

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 5-13-4: Turning Trace Off

Prior to data conversion, Application Engine tracing level 16384 was enabled for the Process Scheduler. After running data conversion, turn off the Application Engine tracing for the Process Scheduler.

See the PeopleTools: Application Engine PeopleBook, Tracing Application Engine Programs.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-14: Backing Up After Data Conversion

Back up your database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15: Finalizing the Database Structure

This section discusses:

- Understanding the Final Database Structure
- Building the Alter with Deletes Scripts
- Altering Tables with Deletes
- Creating Indexes Again
- Creating Triggers
- Running the AE SYNCIDGEN Process
- Creating All Views

Understanding the Final Database Structure

Now that data conversion is complete, this task will alter the tables to remove obsolete columns, and create final indexes and views.

Task 5-15-1: Building the Alter with Deletes Scripts

This step uses the previously created project ALLTABS and generates three SQL scripts: one that will alter tables to drop obsolete columns, one that will also create any remaining indexes that could not be created with the first alter, and one that will create triggers. The script names are:

```
ALLTABS_DEL_ALTTBL.SQL
ALLTABS_DEL_CRTIDX.SQL
ALLTABS_DEL_CRTTRG.SQL
```

Important! All indexes should be created when the ALLTABS_DEL_CRTIDX.SQL script is run. When a unique index fails to be created, it is probably due to a data conversion issue. If a unique index fails to be created, you must resolve the issue and not simply remove the index. To prevent this issue, you can back up tables in the ALLTABS_DEL_ALTTBL.SQL script that will be dropping recfields that have data. This way, if you have an issue you may have the old fields and data that you need to correct it.

Note. For DB2 z/OS sites, if this step takes an exceptionally long time, performing a RUNSTATS on the system catalog tablespace SYSDBASE may improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15-2: Altering Tables with Deletes

This step executes the script ALLTABS_DEL_ALTTBL.SQL, which was generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15-3: Creating Indexes Again

This step executes the script ALLTABS_DEL_CRTIDX.SQL, which was generated in the previous step. All indexes should be created at this time.

Important! Review the log to find any unique indexes that might have failed to be created. All indexes should be created at this time, so those errors are not acceptable and should be corrected. When a unique index fails to be created, it is probably due to a data conversion issue.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15-4: Creating Triggers

This step executes the script ALLTABS_DEL_CRTTRG.SQL, which was generated in a previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15-5: Running the AE SYNCIDGEN Process

This step executes the AE_SYNCIDGEN Application Engine program to regenerate synchronization IDs. PeopleSoft PeopleTools uses synchronization IDs to give each row a unique identifier. For any tables with the Sync ID column set to the default value of zero, the AE_SYNCIDGEN program will populate the column with the next valid Sync ID value.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15-6: Creating All Views

This step runs CREATEVW.DMS to re-create all views in the Copy of Production database. The script will try to create every view in Application Designer. If there is an error on one view, it will keep going until it gets to the end of the list.

Important! Review the log to find any views that failed to be created. All views should be created at this time, so those errors are not acceptable and should be corrected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-16: Loading Data to Complete System Setup

This section discusses:

- Exporting Strings
- Importing Strings
- Exporting EDI Statements
- Importing EDI Statements
- Exporting Mass Change Data
- Importing Mass Change Data
- Exporting XML Service Information
- Importing XML Service Information
- Exporting Related-Language System Data
- Importing Related-Language System Data
- Exporting Application System Data
- Importing Application System Data
- Exporting Notification Template Table
- Importing Notification Template Table
- Exporting Approval Framework System Data

- Importing Approval Framework System Data
- Exporting Common Portal System Options
- Importing Common Portal System Options
- Exporting Setup Data
- Importing Setup Data
- Setting Portal System Options
- Setting Menu Pagelet Values

Task 5-16-1: Exporting Strings

This script exports Strings data from the Demo database. The script name for your upgrade path is:

```
DLUPX04E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-16-2: Importing Strings

This script imports Strings data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX04I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-16-3: Exporting EDI Statements

This script exports EDI Statements from the Demo database. The script name for your upgrade path is:

```
DLUPX05E.DMS
```

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-16-4: Importing EDI Statements

This script imports the EDI Statements into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX05I.DMS
```

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-16-5: Exporting Mass Change Data

This script exports Mass Change tables from the Demo database. The script name for your upgrade path is:

```
DLUPX06E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-16-6: Importing Mass Change Data

This script imports Mass Change tables into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX06I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-16-7: Exporting XML Service Information

This script exports XML service data from the Demo database. The script name for your upgrade path is:

```
DLUPX13E.DMS
```

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-16-8: Importing XML Service Information

This script imports XML service data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX13I.DMS
```

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-16-9: Exporting Related-Language System Data

This script exports system data from various application-related language tables in your Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into your Copy of Production. The script name for your upgrade path is:

```
DLEPLASYSE.DMS
```

Note. During Move to Production passes you can reuse the data files that are created by this export script. Preserve this DAT file, and set the Type of Upgrade property in the PeopleSoft Change Assistant template to Initial Upgrade for this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All Non-English

Task 5-16-10: Importing Related-Language System Data

This script will delete old related-language system data from related-language tables. The script then imports the data exported by the scripts above. The script name for your upgrade path is:

```
DLEPLASYSI.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All Non-English

Task 5-16-11: Exporting Application System Data

This script exports system data from various application tables from the Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

```
DLEPSYSE.DMS
```

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, change the Type of Upgrade from Both to Initial Upgrade in the step properties and save the job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 5-16-12: Importing Application System Data

This script imports the application system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

```
DLEPSYSI.DMS
```

Note. Some of the data will be imported using the *ignore dups* option. These data loads will give the message "Error: duplicate SQL rows" and then give a "Successful completion" message. These error messages can be ignored because duplicate data is expected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-16-13: Exporting Notification Template Table

This script exports the notification template information from the Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

```
DLCGUPY39E.DMS
```

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve this DAT file, and set the properties in the template for Initial Upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 5-16-14: Importing Notification Template Table

This script imports the system data, exported in the above step, into the Copy of Production database. The script name for your upgrade path is:

```
DLCGUPY39I.DMS
```

Note. Run this script using bootstrap mode.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-16-15: Exporting Approval Framework System Data

This script exports the approval framework system data from the Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

```
DLCGUPY41E.DMS
```

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve this DAT file, and set the properties in the template for Initial Upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 5-16-16: Importing Approval Framework System Data

This script imports the system data, exported earlier in this task, into the Copy of Production database. The script name for your upgrade path is:

```
DLCGUPY41I.DMS
```

Note. Run this script using bootstrap mode.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-16-17: Exporting Common Portal System Options

This script exports the contents of the Common Portal System Options table from the Demo database. The script name for your upgrade path is:

```
DLEOX01E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 5-16-18: Importing Common Portal System Options

This script imports the Common Portal System Options data into your Copy of Production database. The script name for your upgrade path is:

```
DLEOX01I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-16-19: Exporting Setup Data

This script exports setup data from the Demo database. The script name for your upgrade path is:

```
DLUPX16E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 5-16-20: Importing Setup Data

This script imports setup data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX16I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-16-21: Setting Portal System Options

This script enables the SWAN look and feel to your system, in addition to the new grid defaults. The script name for your upgrade path is:

```
DLUPX25.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-16-22: Setting Menu Pagelet Values

This script replaces the menu navigation pagelet with the "Top Menu Features" pagelet. The script name for your upgrade path is:

```
PTREMOVEMENUPGLT.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-17: Loading Stored Statements

This section discusses:

- Running the STORECP Script
- Running the STOREFP Script
- Running the STOREGL Script
- Running the STOREIN Script
- Running the STOREMG Script
- Running the STOREPO Script

Task 5-17-1: Running the STORECP Script

STORECP.DMS loads stored statements for COBOL programs owned by Oracle's PeopleSoft Product Configurator product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Product Configurator	All	All

Task 5-17-2: Running the STOREFP Script

STOREFP.DMS loads stored statements for COBOL programs owned by Oracle's PeopleSoft Flow Production product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Flow Production	All	All

Task 5-17-3: Running the STOREGL Script

STOREGL.DMS loads stored statements for COBOL programs owned by the PeopleSoft General Ledger product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	General Ledger	All	All

Task 5-17-4: Running the STOREIN Script

STOREIN.DMS loads stored statements for COBOL programs owned by the PeopleSoft Inventory product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Inventory	All	All

Task 5-17-5: Running the STOREMG Script

STOREMG.DMS loads stored statements for COBOL programs owned by Oracle's PeopleSoft Manufacturing product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Manufacturing	All	All

Task 5-17-6: Running the STOREPO Script

STOREPO.DMS loads stored statements for COBOL programs run by Oracle's PeopleSoft Purchasing product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Purchasing	All	All

Task 5-18: Running Final Update Statistics

This section discusses:

- Generating Final RUNSTATS for DB2 UNIX
- Running Final Statistics for DB2 UNIX
- Running Final Statistics for DB2 zOS

- Running Final Statistics for Informix
- Running Final Statistics for Oracle

Task 5-18-1: Generating Final RUNSTATS for DB2 UNIX

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update statistics on DB2 UNIX/NT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 5-18-2: Running Final Statistics for DB2 UNIX

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. Run the RUNSTATS.SQL script created in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX	All

Task 5-18-3: Running Final Statistics for DB2 zOS

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-18-4: Running Final Statistics for Informix

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. This step runs UPDATESTATS to update the statistics on your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 5-18-5: Running Final Statistics for Oracle

Earlier in the upgrade process you upgraded your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade and testing.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 5-19: Updating Language Data

This section discusses:

- Understanding Updating Language Data
- Running the TSRECPOP Script

Understanding Updating Language Data

In this task, you run scripts to modify data in PeopleSoft PeopleTools-related language tables.

Note. For DB2 z/OS customers, Oracle recommends that you run `RUNSTATS` against the system catalog tables at this time.

Task 5-19-1: Running the TSRECPOP Script

In this step, the TSRECPOP script initializes and modifies the data in PeopleSoft PeopleTools-related language architecture tables.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-20: Completing the PeopleTools Conversion

The PeopleSoft PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleSoft PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with a group number of 02 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-21: Updating Object Version Numbers

In this task, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Note. Do not update statistics after you complete this task.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22: Running the Final Audit Reports

This section discusses:

- Running the Final DDDAUDIT Report
- Running the Final SYSAUDIT Report
- Running the Final SYSAUD01 Report
- Creating the FNLALTAUD Project
- Running the Final Alter Audit
- Reviewing the Final Audits
- Running the Final SETINDEX Report

Task 5-22-1: Running the Final DDDAUDIT Report

DDDAUDIT is an SQR that compares your production SQL data tables with the PeopleSoft PeopleTools record definitions to uncover inconsistencies. You can expect some errors from this report. You will review the output from the report in another step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22-2: Running the Final SYSAUDIT Report

SYSAUDIT is an SQR that identifies *orphaned* PeopleSoft objects. For example, `SYSAUDIT` will identify a module of PeopleCode that exists but does not relate to any other objects in the system. `SYSAUDIT` also identifies other inconsistencies within your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22-3: Running the Final SYSAUD01 Report

SYSAUD01 is an SQR that identifies *orphaned* PeopleSoft objects. SYSAUD01 also identifies other inconsistencies within your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22-4: Creating the FNLALTAUD Project

In this step, you create the FNLALTAUD project and use it to run your final Alter Audit. Creating this new project now ensures that all the records in your system are audited, including SQL tables. This project also includes any custom records that you have created in your system.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22-5: Running the Final Alter Audit

Run the PeopleSoft PeopleTools alter record process on all tables in your system to check whether the PeopleSoft PeopleTools definitions are synchronized with the underlying SQL data tables in your database. This process is called an Alter Audit. An Alter Audit compares the data structures of your database tables with the PeopleSoft PeopleTools definitions to uncover inconsistencies. The Alter Audit then creates an SQL script with the DDL changes needed to synchronize your database with the PeopleSoft PeopleTools definitions.

The Alter Audit script is built using the FNLALTAUD project created in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22-6: Reviewing the Final Audits

The Alter Audit process creates SQL scripts that correct any discrepancies between your PeopleSoft PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies noted by running the generated scripts with your platform-specific SQL tool. The script names are:

```
FNLALTAUD_ALTTBL.SQL
FNLALTAUD_CRTIDX.SQL
```

Note. The Alter Audit process also creates the script `FNLALTAUD_CRTTRG.SQL`, which re-creates all database triggers. You do not need to run this script, since all database triggers were created in a previous task.

See Finalizing the Database Structure.

Note. For Informix sites, if your database has Application Functions, you use SQL to drop and re-create these functions and their associated indexes, even though the underlying tables and indexes have not changed.

Note. For Microsoft SQL Server and DB2 UNIX/NT platforms, if your database has tables containing the MSSCONCATCOL or DBXCONCATCOL column, you will see SQL alter the tables and re-create their associated indexes, even though the underlying tables and indexes may not have changed.

Review the output from the SYSAUDIT, SYSAUD01, and DDDAUDIT reports and correct any discrepancies.

Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from PeopleSoft Application Designer are not automatically deleted from the system tables. Oracle takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Similarly, your SYSAUDIT and SYSAUD01 reports may have some errors due to references to obsolete PeopleSoft-owned objects. Invalid references are not automatically cleaned up during the upgrade in case you have customizations that you want to modify. For instance, if a PeopleSoft Permission List is deleted, and you have a Role that still refers to that Permission List, then it will appear on the SYSAUDIT and SYSAUD01 reports.

See the PeopleTools: Data Management PeopleBook for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-22-7: Running the Final SETINDEX Report

The SETINDEX SQR updates index overrides stored in the PSIDXDDLPARM table. The SQR updates the values stored in the PARMVALUE field with current values found in the system catalog. Running `SETINDEX` cleans up fragmentation issues that may have occurred during data conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 5-23: Restoring the New Release Demo

Restore your New Release Demo database from the backup made earlier in the chapter "Planning Your Application Upgrade." The backup was taken before projects were copied and scripts were run against the New Release Demo. This is done to restore the environment to an Oracle-delivered Demo implementation. If your Copy of Production has a base language other than English, this restore will undo any changes you might have made on your New Release Demo (Source) in the tasks "Swapping PeopleTools Tables" and "Swapping Languages on System Data" in the chapter "Applying Application Changes."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

CHAPTER 6

Completing Database Changes

This chapter discusses:

- Understanding Database Changes
- Configuring the Upgrade Environment
- Reapplying Customizations
- Setting Up Security
- Completing Portal Data Conversion
- Backing Up Before Manual Changes
- Completing ChartField Configuration
- Reviewing PeopleTools Functionality
- Enabling Oracle Transparent Data Encryption
- Preparing the Content Provider Registry
- Updating the Portal Options Data
- Setting Country Codes
- Completing Credit Card Encryption
- Upgrading the Credit Card Integration
- Configuring PeopleSoft Integration with Vertex O
- Rebuilding Verity Search Indexes
- Reconciling Notification Templates
- Reviewing Approval Workflow Framework
- Completing Promotions
- Completing Billing Setup
- Configuring Order Management
- Configuring Attachments
- Completing Strategic Sourcing Setup
- Reviewing eProcurement Setup
- Completing Services Procurement Setup
- Completing Supplier Contracts Setup
- Configuring PayBill Management

- Preparing Treasury Setup
- Reviewing Electronic Layouts for Banks
- Completing Setup for Projects
- Setting Resource Management
- Performing Payables Setup
- Completing Receivables Changes
- Updating eSettlements
- Updating the General Ledger
- Setting Up Commitment Control
- Completing Asset Management Setup
- Completing Contracts Setup
- Completing Expenses Setup
- Setting VAT Processing
- Reviewing Inventory Policy Planning
- Configuring Inventory
- Deleting Rename Data
- Stamping the Database
- Reviewing Change Control
- Backing Up Before Testing
- Testing Your Copy of Production

Understanding Database Changes

Many changes were made in the previous chapters of this documentation. In this chapter, you complete these changes so that you can begin testing your Copy of Production. By testing your Copy of Production, you ensure that you can still operate day-to-day processes on your new PeopleSoft release.

Task 6-1: Configuring the Upgrade Environment

This section discusses:

- Configuring the Web Server
- Configuring Portal

Task 6-1-1: Configuring the Web Server

Running PeopleSoft Portal requires a fully functional web server. In this step, configure your web server. Make sure that you also configure your web server for PeopleSoft PeopleBooks so that you can easily refer to the documentation while reviewing the new release.

See the PeopleTools installation guide for your database platform on your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-1-2: Configuring Portal

Running PeopleSoft Portal requires a fully functional application server domain. The application server was configured earlier in the upgrade. PeopleSoft applications are accessed through the portal. You need to grant users access to complete the upgrade process. You must install and configure the PeopleSoft Portal to complete the upgrade.

Note. If you configured your PeopleSoft Portal earlier in the upgrade, you can skip this step.

You also must define a password on the Node Definitions page for Single Signon to work properly. If you do not define a password, the sign-on page appears when trying to access a report directly, instead of the report itself. To avoid this issue, follow the procedure below to assign a password.

To assign a password:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Click Search.
3. Select the database's default local node.

   The default local node shows a *Y* in the Default Local Node column.
4. On the Node Definitions page, select *Password* in the Authentication Option field.
5. Enter a password in the Node Password field.
6. Enter the password again in the Confirm Password field.
7. Enter the default user in the Default User ID field.
8. Save the node definition.
9. Reboot the application server and web server.

See the PeopleTools installation guide for your database platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-2: Reapplying Customizations

This section discusses:

- Understanding the Reapplication
- Performing Customized Object Adjustment
- Registering Portal Navigation Objects

Understanding the Reapplication

In this task, you work with your customized objects to ensure that they are properly integrated into your upgraded database.

Task 6-2-1: Performing Customized Object Adjustment

When you reviewed your upgrade compare reports, you decided whether to take the Source or Target version of the objects. If you took the Oracle-delivered version of an object instead of your own customized version, you may need to customize the new objects to get the blend of new standard features and your custom features. In complex cases, this may take several iterations. You need to make manual adjustments to the objects to apply these customizations.

Once you reapply all of your customizations, you should run the DDDAUDIT, SYSAUDIT, and SYSAUD01 reports to make sure that you did not introduce any problems into your system.

Reapply any Mass Change or EDI customizations.

See “Planning Your Application Upgrade,” Identifying Customizations.

Be aware that you must not overwrite Oracle-loaded data. The customizations, extracted during an earlier step, must be manually applied now.

In another step, you applied the Oracle-delivered record group assignments.

See “Applying Application Changes,” Loading Data for Data Conversion, Importing Record Groups.

If you maintain any custom record group assignments, reapply them to your Copy of Production database now.

During Move to Production passes, you will not need to reapply these customizations. The changes you make now will be copied to any subsequent Copy of Production database using PeopleSoft Data Mover scripts.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-2-2: Registering Portal Navigation Objects

You must register your customized objects, such as menus and components, to access them in PeopleSoft Portal. You can use the Registration Wizard or the Menu Import process to grant access to the appropriate components. Make sure that you register your components for all of your portals (for example, Customer, Supplier, Employee, and so forth). Also, make sure that you select the node name that matches the database. Do not use the Local node.

See the PeopleTools: PeopleSoft Application Designer Developer's Guide PeopleBook for your new release, "Using the Registration Wizard."

See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your new release, "Administering Portals."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-3: Setting Up Security

This section discusses:

- Understanding Security
- Performing Security Setup
- Synchronizing CREF Permissions
- Granting Access to Personalize the Homepage

Understanding Security

In this task you perform steps to set up security, grant access to the user ID, set up permissions lists, and grant access to navigation and homepages.

Task 6-3-1: Performing Security Setup

This section discusses:

- Understanding Security Setup
- Updating Permissions and Roles: Services Procurement Customers

Understanding Security Setup

Select the PeopleTools, Security folder now to add the new PeopleSoft PeopleTools and application menus, delete old menus, and set up appropriate operator security for your system.

Many menu additions and deletions have occurred. Examine the menu compare report and the Demo database for details of the required security changes, then decide which of your roles and permission lists should have access to each of the new menus.

Many tasks in this chapter instruct you to select a specific menu within the new PeopleSoft release. To perform these tasks, set up appropriate security for each of the menus referenced in each of the tasks.

See the PeopleSoft Applications Portal PeopleBook: Portal and Site Administration for your new release, information on PeopleSoft-delivered security.

Note. Move to Production: If you changed the user profiles in your production system after you froze your PeopleSoft PeopleTools, you must manually apply the changes to your Copy of Production database before the end of the final Move to Production.

Updating Permissions and Roles: Services Procurement Customers

The PeopleSoft Services Procurement approval permission list, EPSP5000, has been broken into separate permissions for each type of approval. Permission list EPSP5000 was previously associated with the SP_APPROVER role that allowed approval access to several functional areas including requisitions, work orders, time, expenses, progress logs, and invoicing. The table below lists the break out of the EPSP5000 approval permission list (EPSP5000 through EPSP5050). It also shows several new permissions that were added as a result of new features.

8.8x Permission List	Renamed/New Permission List
EPSP5000	EPSP5000 – Services Requisition Approval EPSP5010 – Services Work Order Approval EPSP5020 – Services Time Approval EPSP5030 – Services Progress Log Approval EPSP5040 – Services Invoice Approval EPSP5050 – Services Expense Approval
Not applicable	EPSP5500 – Services Resource Identifier
EPSP8600–Supplier Administrator (8.8 SP1)	EPSP8600 – Supplier Administrator
Not applicable	EPSP9500 – Services Integration Analyst

Three new approval roles have been added for the specific functions of approving time, expenses, and invoicing. Other roles have also been added as a result of new functionality. You will want to realign the permissions and roles for all your approval users and users of the new features.

8.8x Roles	Modified/New Roles
SP_APPROVER SP_PLOG_APPROVER* SP_WO_APPROVER*	SP_APPROVER SP_PLOG_APPROVER SP_WO_APPROVER SP_EXPENSE_APPROVER SP_TIME_APPROVER SP_INV_APPROVER
SP_DEVELOPER	OBSOLETE
Not applicable	SP_INTEGRATION_SUPERVISOR
Not applicable	SP_RESOURCE_IDENTIFY
SP_SUPPLIER_ADMINISTRATOR (8.8 SP1)	SP_SUPPLIER_ADMINISTRATOR
SP_PROVIDER_CONTACT_BY_LOC (8.8 SP1)	SP_PROVIDER_CONTACT_BY_LOC*
Not applicable	SP_sup_inv_approver_byinvoice*

* Indicates the role is used for workflow routing purposes only. No permission lists are added to these roles in the specified release.

Note. The SP_APPROVER role should still be used for requisition approvals.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-3-2: Synchronizing CREF Permissions

This section discusses:

- Understanding Content Reference Permissions
- Running the Portal Security Synchronization Process

Understanding Content Reference Permissions

As part of the PeopleSoft PeopleTools Portal architecture, Portal Registry Structures reference permission lists. At this point, however, the PeopleSoft Portal Registry Structures copied from the Demo database do not reference any permission lists on the Copy of Production database. This synchronization program will match the existing permission lists to the appropriate Registry Structures and update it.

Note. The user ID that invokes this process must have the security role Portal Administrator. Otherwise, the process may terminate abnormally.

Note. Your PeopleSoft Process Scheduler must be running to perform this task.

Running the Portal Security Synchronization Process

Follow the steps below to run the PeopleSoft Portal security synchronization process.

To run the security synchronization process:

1. From your browser, sign in to your Target database.
2. Select PeopleTools, Portal, Portal Security Sync.
3. Click Add a New Value.
4. Enter the run control ID *UPG_PORTAL_SYNC_BOTH*.
5. Click Add.
6. Keep the default value for the default portal registry name in the Portal Name field (for example: *EMPLOYEE*, *CUSTOMER*, or *SUPPLIER*.)
7. Click Save.
8. Click Run.
9. In the Process Scheduler page, check that you set your parameters correctly.
10. Click OK.
11. Click the Process Monitor link to monitor the program's process.
12. Repeat steps 6 through 11 for each Portal name used in the database for your specific applications.

    With each repetition, in step 6 change the Portal Name field to one of the following: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, and so on.
13. Review any messages received during the running of this process with your Portal Administrator.

See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your new release.

Note. If the permission lists for your upgrade user do not allow you access to a component, you will encounter this error when running the security synchronization process for that page: `Security synchronization failed for Portal Object.` This error may indicate other problems with the component or folder, but you should check your security first.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-3-3: Granting Access to Personalize the Homepage

This section discusses:

- Understanding Access to the Portal Homepage
- Updating the Homepage Personalization Permission List
- Adding the Portal User Role

Understanding Access to the Portal Homepage

You must complete this step if you use any of the PeopleSoft Portal Pack products or pagelets. To add, remove, or change the layout of the homepage, you must grant homepage personalization security access to all non-guest users.

Updating the Homepage Personalization Permission List

To update the homepage personalization permission list:

1. Using PeopleSoft Data Mover, sign in to the Target database.
2. Open the PeopleSoft Data Mover script *PS_APP_HOME*\SCRIPTS\PORTAL_HP_PERS.DMS.
3. Run this script against the Target database.
4. Close PeopleSoft Data Mover.

Adding the Portal User Role

To add the Portal User Role to the user IDs:

1. Using PeopleSoft Data Mover, sign in to the Target database.
2. Open the PeopleSoft Data Mover script *PS_APP_HOME*\SCRIPTS\PORTAL_ADD_ROLE.DMS.
3. Run this script against the Target database.
4. Close PeopleSoft Data Mover.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, manually remove the role PAPP_USER from any GUEST user ID, because a GUEST user should not be personalizing the common homepage.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-4: Completing Portal Data Conversion

This section discusses:

- Reviewing the Pagelet and Collection Log
- Enabling Pagelet Publishing

Task 6-4-1: Reviewing the Pagelet and Collection Log

This section discusses:

- Correcting Logged Issues
- Running UPGPT846PP Again

This step explains how to correct logged issues for Navigation Collections, Portal Registry objects, and Pagelet Wizard objects.

Note. Perform this step only if there are logged issues that need to be resolved for Navigation Collections, Portal Registry Objects, or Pagelet Wizard objects reported from the UPGPT846PP process.

Correcting Logged Issues

Review the log from running the data conversion UPGPT846PP Application Engine program in the task titled, "Completing the PeopleTools Conversion." Correct the issues from the log using the instructions in the MAIN section comments of the UPGPT846PP program. These instructions were reported in the chapter “Applying PeopleTools Changes” task Converting PeopleTools Objects in the Reporting Conversion Details step.

See “Applying Application Changes,” Completing the PeopleTools Conversion.

See “Applying PeopleTools Changes,” Converting PeopleTools Objects, Reporting Conversion Details.

Running UPGPT846PP Again

In this step, you run the UPGPT846PP process again.

Note. The Application Engine process UPGPT846PP can be run repeatedly, if necessary, as you resolve data issues.

To run UPGPT846PP again:

1. Run the Application Engine conversion process UPGPT846PP with the upgrade user ID.

   The program can be run from the command line with the following:

   ```
   $PS_HOME\bin\client\winx86\psae -CD dbname  -CT dbtype -CS dbservername -CO ⇒
   oprid -CP oprpswd -R 1  -AI UPGPT846PP
   ```

2. Review the log file according to the instructions in the previous step.
3. If there are any remaining issues, correct them and rerun UPGPT846PP.
4. Repeat steps 2 and 3, if necessary, until there are no remaining issues for Navigation Collections, Portal Registry objects, or Pagelet Wizard objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-4-2: Enabling Pagelet Publishing

This step enables the creation of homepage pagelets for Navigation Collections and Pagelet Wizard. The script name for your upgrade path is:

```
PTPP_PORTAL_PACK.DMS
```


Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-5: Backing Up Before Manual Changes

Back up your Copy of Production database now. This enables you to restart your upgrade from this point should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-6: Completing ChartField Configuration

This section discusses:

- Running the Configuration Steps Report
- Performing Manual Configuration Steps

Task 6-6-1: Running the Configuration Steps Report

Follow the procedure below to run the Configuration Steps Crystal report.

To run the Configuration Steps Crystal report:

1. Select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Reports, Configuration Steps.
2. Run the Configuration Steps Crystal report for CF Configuration ID: INSTALL_PRODUCT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-6-2: Performing Manual Configuration Steps

The manual configuration steps are outlined in the Configuration Steps report that you ran in the previous step. You must complete these steps before using the system.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook* "Configuring ChartFields."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-7: Reviewing PeopleTools Functionality

The PeopleSoft PeopleBooks detail the current PeopleSoft PeopleTools functionality. There are many new features delivered in the new release that you may want to use. You should now review the PeopleSoft PeopleBooks and PeopleTools installation guide to configure your environment properly. This may include, but is not limited to, configuring and starting a process scheduler and a report server, and reviewing portal settings.

See the PeopleTools installation guide for your database platform on your new release.

To review the PeopleSoft PeopleTools Release Notes, go to My Oracle Support and search for the PeopleSoft PeopleTools Release Notes for your new release.

You should review the following considerations:

- If you applied a PeopleSoft PeopleTools patch earlier in the upgrade, review the patch documentation and run any steps that you have not already performed during the upgrade.

  Check your PeopleSoft Change Assistant output directory if you do not know whether a script was already run during the upgrade process.

- Oracle has updated the styles that define the look of the user interface.

  Three user interface options were delivered with your current release of PeopleSoft 8.x. Pre-8.50 PeopleSoft PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. The classic and light blue styles are considered deprecated as of PeopleSoft PeopleTools 8.50. The dark blue style is set as the default during the PeopleSoft PeopleTools portion of the upgrade, but you have the option to change the user interface style.

  See Appendix: “Changing the User Interface.”

  Note. The new user interface styles are used with the supported browsers for your PeopleSoft PeopleTools release. If you are using any other browser or release, the system uses the classic style as the default.

- PeopleSoft PeopleTools uses Verity to implement free text search.

  If a new release of Verity is required with the new PeopleSoft PeopleTools release, you need to check for the necessary application patches that may be required to use the new version of Verity.

  To check for required patches, go to My Oracle Support, select Patches & Updates, PeopleSoft, and search for PeopleTools Required for Upgrade patches for Verity.

- Integration Broker was rewritten in PeopleSoft PeopleTools 8.48.

  If you use Integration Broker, you will need to perform setup configuration and review the explanation of metadata mapping.

See the PeopleTools: PeopleSoft Integration Broker PeopleBook for your new release, Appendix: "Understanding Migrated Integration Metadata."

- In PeopleSoft PeopleTools 8.50, Microsoft SQL Server customers need to use a non-system administrator access ID. If you are upgrading from PeopleSoft PeopleTools 8.49 or earlier, enable and configure the access ID after completing the final pass of the upgrade.

  See the PeopleTools Installation for Microsoft SQL Server guide for your new release, Appendix: "Synchronizing the ACCESSID User."

- Review your PeopleSoft Portal settings, as the values may have changed during the upgrade.

  See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your release, Appendix: "Understanding Changes in Portal Configuration Settings."

- As of PeopleSoft PeopleTools 8.51, Oracle database customers can now restrict the Access ID to the minimum privileges needed to run PeopleSoft applications. If you are upgrading from PeopleSoft PeopleTools 8.50 or earlier, restrict the Access ID privileges after completing the final pass of the upgrade.

  See the PeopleTools Installation for Oracle guide for your current release, "Creating a Database Manually on Windows" and "Creating a Database on UNIX," Creating PeopleSoft Database Roles.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-8: Enabling Oracle Transparent Data Encryption

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. Oracle's Transparent Data Encryption (TDE) feature was disabled at the beginning of the upgrade. If you had TDE enabled prior to the upgrade, then after finishing the final Move to Production pass of the upgrade, you need to re-enable TDE by running scripts in the sequence specified in the following procedure.

To re-enable TDE:

1. Run *PS_HOME*\scripts\postupgtdeprocess1.sql.

   The script postupgtdeprocess1.sql performs similarly to the script preupgtdeprocess.sql, which you ran at the beginning of the upgrade, to find any tables that are encrypted, generate a list of fields that need to have the PeopleSoft metadata encryption attribute re-enabled, and create the ENCRYPTEDTBLSA project. The ENCRYPTEDTBLSB project is compared with the ENCRYPTEDTBLSA project, and the resulting list of differences between the recfields is input to the script postupgtdeprocess2.sql.

   See "Applying PeopleTools Changes," Performing Updates to PeopleTools System Tables, Saving Transparent Data Encryption Information.

2. Run *PS_HOME*\scripts\postupgtdeprocess2.sql.

   The script postupgtdeprocess2.sql generates four scripts, which you will run in the next step to reapply TDE to the records identified by the postupgtdeprocess1.sql. Review the generated scripts (particularly PSTDEREBUILDFUNCIDX.SQL) to make sure that the syntax, sizing, and tablespace information is intact and is not split at the end of a line. If necessary, modify the scripts as needed for your environment.

3. Run the scripts that were generated when you ran postupgtdeprocess2.sql in the following order:
   - PSTDEDROPFUNCIDX.SQL
   - PSTDEREENCRYPT.SQL
   - PSTDEREBUILDFUNCIDX.SQL
   - PSTDEREENCRYPTMETADATA.SQL
4. Run *PS_HOME*\scripts\postupgtdevalidation.sql.

   The script postupgtdevalidation.sql validates that all tables and columns that were encrypted before the upgrade have maintained encryption. It lists any records that contain encrypted fields but were not included in the ENCRYPTEDTBLSB project. It also sets the value for the TDE algorithm defined within PSOPTIONS.

See the PeopleTools: Data Management PeopleBook for your new release, Administering PeopleSoft Databases on Oracle, "Implementing Oracle Transparent Data Encryption."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	Oracle	All

Task 6-9: Preparing the Content Provider Registry

You should perform this task if you use PeopleSoft Portal Solutions 8.4 or later running on PeopleSoft PeopleTools 8.50 or later with full or partial navigation load access method. This means that you do not use a single link to access your content provider databases, but instead, you load some or all of the portal registry structures from the content provider database into your PeopleSoft Portal Solutions database. Oracle refers to content provider databases as the application databases that contain the transaction content. Your Copy of Production database is your content provider database for this task.

When you upgrade a content provider database, the registry structures are updated, old registry structures are removed, and new registry structures are added. These changes need to be copied to the PeopleSoft Portal Solutions database by updating the portal registry structures in your PeopleSoft Portal Solutions database to match what is in the content provider database. Follow the detailed instructions in the appendix referenced below.

See Appendix: "Upgrading the Content Provider Registry."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-10: Updating the Portal Options Data

In this step you update the PeopleSoft PeopleTools Portal Options data.

Note. Only perform this step if your upgraded database is on PeopleSoft PeopleTools 8.46 or greater.

This step sets the portal options prefix and Owner ID. These values are used when creating Pagelet Wizard definitions and Navigation Collection objects.

To set the Portal Options Prefix and Owner ID:

1. From your browser, sign in to your New Copy of Production database.
2. Select PeopleTools, Portal, Portal Utilities, System Options.
3. Update the value for the Registry Object Prefix with a 1- to 4-character prefix that is unique to your organization.

   Note. Do *not* use PAPP, PAPX, PAPQ, PAPI, PRTL, EO, or PT. Do *not* use any product line specific prefix (such as CR, HC, EP, or CI). Do *not* use a blank value.

4. Enter the Owner ID value with your organization's specific owner ID.

   Note. The Owner ID is a translate value on the PeopleSoft PeopleTools field OBJECTOWNERID. Do *not* use any delivered product Owner ID. If you do not have an Owner ID, then either create one, or leave the Owner ID value as a blank space.

5. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 6-11: Setting Country Codes

This section discusses:

- Understanding Country Codes
- Adding New Country Codes
- Modifying Existing Country Codes

Understanding Country Codes

The PeopleSoft system provides the 239 ISO 3166-compatible country codes as part of system data. However, the PeopleSoft system also provides an interface through which you can customize the country codes, either to add new ones or modify existing ones. Since the COUNTRY_TBL record is considered system data, it was repopulated with the current countries as defined by the PeopleSoft system. As a result, any additional countries you may have added and any other customizations you may have made to this table were deleted.

Note. The ISO 3166-1 alpha 3 country code for Romania has been changed by International Organization for Standardization (ISO). To reflect this change, the country code for Romania has been updated in your PeopleSoft FSCM 9.1 database from ROM to ROU. As a result of this change, your transactional data might require a correction if you are using the country code ROM.

If you have customized country code entries, perform the following steps using the results from the SQL query in the task titled Reviewing Country Data.

See “Preparing Your Database for Upgrade,” Reviewing Country Data.

Task 6-11-1: Adding New Country Codes

In this step, you add new country codes.

To add new country codes:

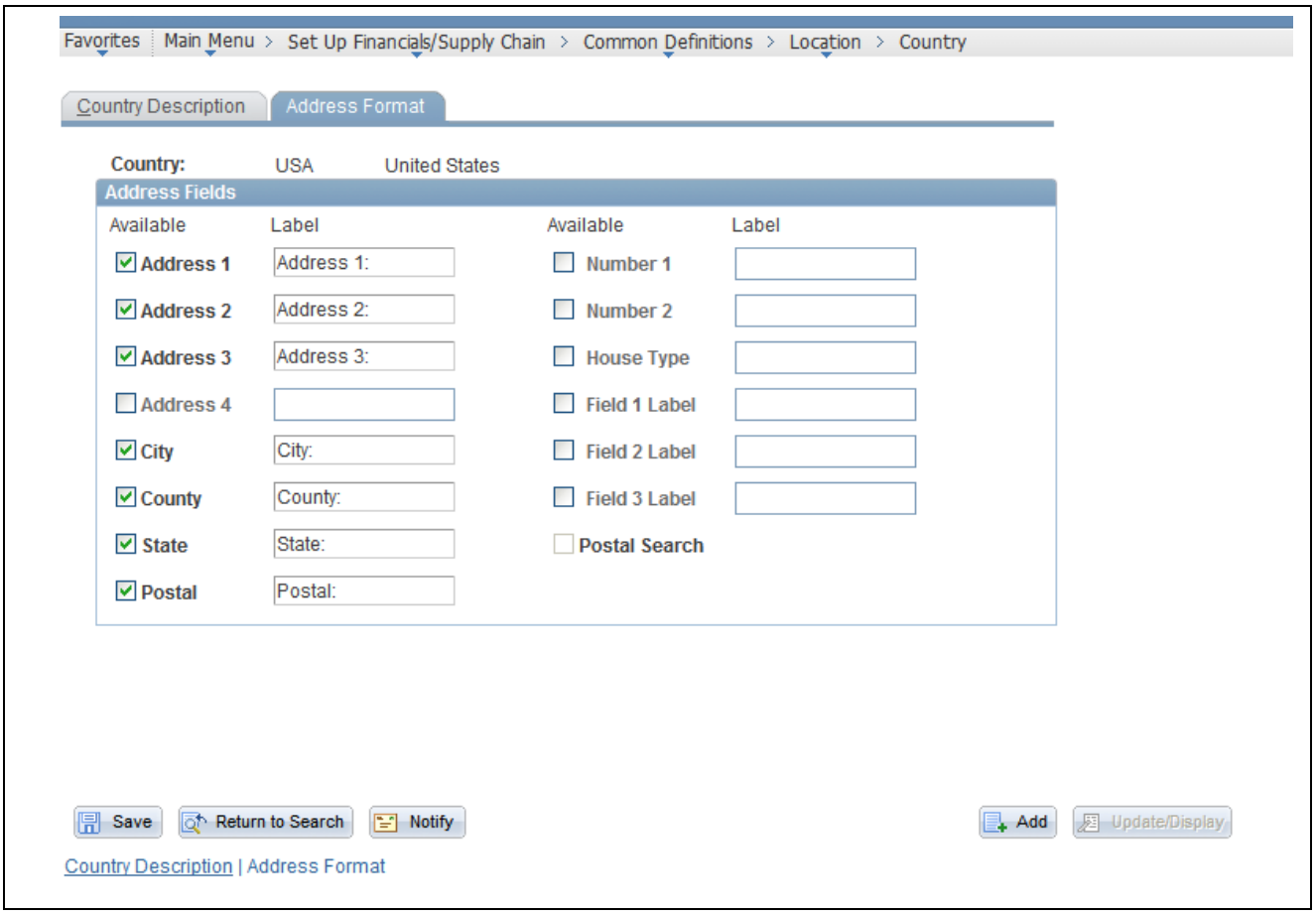
1. Select Set Up Financials/Supply Chain, Common Definitions, Location, Country.
2. Select the Add a New Value tab.
3. Enter the new country code and click Add.
4. Using the query results from the task titled Reviewing Country Data, enter the values in the Description, Short Description, and 2-Character Country Code fields.

   If the country is a European Union member, select the EU Member State check box.

   See “Preparing Your Database for Upgrade,” Reviewing Country Data.
5. Select the Address Format tab.
6. Indicate the labels that you would want to appear to the users affiliated with this country.

   The following example shows the labels for USA such as Address 1, Address 2, Address 3, City, County, State, and Postal.

   Note. The Available check box indicates whether the label is available for display to the user.



Country page: Address Format tab

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-11-2: Modifying Existing Country Codes

In this step, you modify your existing country codes.

To modify existing country codes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Location, Country.
2. Enter the country code you want to modify and click Search.
3. Update the necessary fields based on the query results from the task titled Reviewing Country Data.

   See “Preparing Your Database for Upgrade,” Reviewing Country Data.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-12: Completing Credit Card Encryption

This section discusses:

- Understanding Credit Card Encryption
- Reviewing Credit Card Encryption Status
- Running Credit Card Encryption

Understanding Credit Card Encryption

In this task, you upgrade your existing credit card data. First, you must ensure that your credit card data has already been encrypted.

Task 6-12-1: Reviewing Credit Card Encryption Status

Before running credit card encryption, you must check to see whether the credit card data has already been encrypted as part of a release bundle applied to an earlier release.

To check credit card encryption status:

1. Select Set Up Financials/Supply Chain, Upgrade, Upgrade Credit Card Numbers.
2. Add a Run Control ID.
3. If the Generate Random Key button is disabled, some of the data has already been converted.

   This conversion could have resulted from the implementation of a bundle containing the new encryption functionality or from previously performing a partial upgrade conversion. In this case, the encryption key is already set and the existing data is encrypted with it, so you cannot generate a new key.

   If the Generate Random Key button is disabled, skip the following step titled Running Credit Card Encryption.
4. If the Generate Random Key button is active, complete the remaining steps in this task.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-12-2: Running Credit Card Encryption

The new PeopleSoft FSCM release provides more secure credit card encryption. Therefore, all stored credit card numbers within the system must be upgraded to use the Triple DES algorithms and 168-bit encryption keys.

To run credit card encryption:

1. Select Set Up Financials/Supply Chain, Upgrade, Upgrade Credit Card Numbers.
2. Click the Generate Random Key button.

   Note. If this button is disabled, some of the data is already converted as a result of implementing a bundle containing the new encryption functionality or of previously performing a partial upgrade conversion. In this case, the encryption key is set and the existing data is encrypted with it, so you cannot generate a new key.

3. Click the Run button.

   This action will either encrypt or re-encrypt each field in the grid, depending on the state of the current value.

4. Once all values are set to *No Action*, the upgrade is complete.

   Note. If the process fails for any reason or if you see value other than *No Action* after it completes, you can restart the process using the Process Scheduler Restart functionality and it will continue from where it stopped. If you cannot restart the process this way, then start the process from the beginning by clicking Run on this page. The process will bypass any values that are already processed.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-13: Upgrading the Credit Card Integration

The Business Interlink credit card integration is no longer supported in PeopleSoft FSCM 9.1. You will need to convert any Business Interlink integrations for credit card processing to use the Integration Broker credit card integration solution.

The Integration Broker solution uses the Enterprise Components delivered objects. In addition, the Integration Broker solution has been enhanced to support the Authorization Reversal service. It now also supports a new security code (CVV) field as input to the third-party credit card processor.

The new service is identified in the EOEC_CCI_TRANSACT field (alias TRANSTYPE) of the EOEC_CCI_SYNC message with a value of 5 for Authorization Reversal. The security code field is identified in the EOEC_CCI_CVNUM field (alias CVNUM) of the EOEC_CCI_SYNC message. Transformation programs are not delivered with PeopleSoft FSCM so you will need to modify your existing transformation program to support this new service and field.

See PeopleSoft 9.1 PeopleBook: Integration Interfaces, “Setting Up the Credit Card Interface” for more information on the Integration Broker solution.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-14: Configuring PeopleSoft Integration with Vertex O

PeopleSoft FSCM 9.1 communicates with the Vertex O Series web service only through PeopleSoft Integration Broker. To integrate with the Vertex O Series tax solution, you must have installed Vertex O Series 5.0 or above and the Vertex PGC (PeopleSoft Generic Connector) both provided through Vertex. A new generic tax message must be activated. Older Vertex specific messages will no longer work.

To configure your PeopleSoft system for integration with Vertex O:

1. Set up your local integration gateway and load the gateway connectors.

   Integration Broker uses the HTTPTARGET connector to communicate with the Vertex web service.
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.
3. On the Queue Definitions page, activate the TAX_INTEGRATION service operation queue.

   For the TAX_INTEGRATION queue, verify that the Queue Status is *Run*.
4. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
5. On the Service Operations - General page, activate the service operations DO_TAXCALC_ REQ and GET_GEOCODE_REQ.

   Oracle delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source, such as Vertex.

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
DO_TAXCALC_ REQ	Outbound	Not applicable	No	Vertex O Series
GET_GEOCODE_ REQ	Outbound	Not applicable	No	Vertex O Series

6. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
7. On the Service Operations page, select the Routings tab.
8. Activate the DO_TAXCALC_REQ_V2 and the GET_GEOCODE_REQ_TAX routings for the PSFT_TAX node.
9. For the DO_TAXCALC_REQ_V2 routing, set the PrimaryURL property to the endpoint of the Vertex tax calculation request function.

Typically this will be: http://<host:port>/pgc/servlet/taxcalc. Replace <HOST:PORT> with the address of the Vertex Peoplesoft Generic Connector.

10. For the GET_GEOCODE_REQ_TAX routing, set the PrimaryURL property to the endpoint of the Vertex tax area request function.

    Typically this will be: http://<host:port>/pgc/servlet/taxarealookup. Replace <HOST:PORT> with the address of the Vertex Peoplesoft Generic Connector.

11. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
12. Activate the PSFT_TAX node.

To test the Vertex O Series integration, click the Test Tax Install button on the Tax Provider Installation page. The system will send a test transaction to Vertex and should report a Geocode and nonzero tax amount. If an error message appears or the tax amount is zero, then there is a problem with the tax installation that must be corrected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-15: Rebuilding Verity Search Indexes

In this task, you rebuild your Verity search indexes.

Note. In this PeopleSoft FSCM release, the indexes CS_DOCUMENTS_ADH and CS_DOCUMENTS_PO have been combined into one index, CS_DOCUMENTS. You may need to update your application server and PeopleSoft Process Scheduler configurations to reflect this change.

To rebuild Verity search indexes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Search Indexes, Build Search Index.
2. If a run control does not exist, add a run control-index combination for every index you want to rebuild.
3. Submit the process with the build option *Create New/Rebuild* selected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-16: Reconciling Notification Templates

In this task, you reconcile updates to component and generic notification templates with changes that you made to customize these templates. You should review the notification text and variables.

To access component notification template information, select PeopleTools, Workflow, Notifications, Notification Templates.

To access component notification template variables, select PeopleTools, Workflow, Notifications, Template Variables.

To access generic template information, select PeopleTools, Workflow, Notifications, Generic Templates.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-17: Reviewing Approval Workflow Framework

The approval workflow framework is enhanced in the new PeopleSoft FSCM release to offer more scalability. Changes were made to how approval processes are defined and to the performance of the approval workflow engine.

If your product uses the approval workflow framework, review the following reference and, if applicable, any product-specific PeopleBook documentation about your use of the framework.

See PeopleSoft 9.1 PeopleBook: Approval Framework.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-18: Completing Promotions

This section discusses:

- Updating Tree Statistics

Task 6-18-1: Updating Tree Statistics

In this step, you optimize the performance of your Product Tree structures.

To update tree statistics:

1. Select Set Up Financials/Supply Chain, Product Related, Promotions Management, Update Tree Statistics.
2. Create a run control ID, if needed.
3. Add a row for every setID/Customer Tree and setID/Product Tree combination in your system.
4. Click Run to submit the update process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Promotions Management	All	All

Task 6-19: Completing Billing Setup

This section discusses:

- Creating Recommended Manual Indexes
- Defining Payment Terms for Paid Invoices
- Defining Reason Codes for Billing Adjustments
- Enabling Inline Crystal Reports

Task 6-19-1: Creating Recommended Manual Indexes

PeopleSoft Billing has published recommended index modifications that may apply to your installation. These index options depend on your installation and therefore cannot be included in the delivered application.

For the latest information, go to My Oracle Support, Patches & Updates, PeopleSoft, and search for report ID 1944858000.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 6-19-2: Defining Payment Terms for Paid Invoices

A new option defined at the PeopleSoft Billing business unit level allows you to define a payment term for invoices that are fully paid and that do not have a discount for early payment. This new option ensures that the discount for early payment is not applied during the Accounts Receivable payment application process. If you do not define a payment term, outstanding credits could occur in accounts receivable.

To define payment terms for paid invoices:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Billing, Billing Options.
2. Enter a setID value.
3. Select a value from the prompt dialog box and enter it in the Pay Terms for Fully Paid Bill field.
4. Repeat steps 2 and 3 for every valid setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 6-19-3: Defining Reason Codes for Billing Adjustments

Billing Adjustments now require a reason code to be entered. You may want to set up the reason codes that you intend to use for adjustments. If you do not define new reason codes, only existing ones will be available when creating a Billing Adjustment. The Reason Code field is required to save the adjustment.

To define reason codes for Billing Adjustments:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes.
2. Enter values in the setID and Reason Type Credit Memo fields.
3. Enter the new reason code and a description.
4. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 6-19-4: Enabling Inline Crystal Reports

A new installation flag has been added to allow users who do not use Crystal Reports or do not have a license for Crystal Reports to run PeopleSoft Billing jobs from online push buttons without receiving an error.

If you run Crystal reports for invoicing, you must select the check box for the installation flag Enable Inline Crystal Reports. If you do not select this check box, the PeopleSoft Billing invoicing jobs that you run from push buttons will not include any Crystal invoice printing.

To update the installation flag Enable Inline Crystal Reports:

1. Select Set Up Financials/Supply Chain, Install, Installation Options, Overall.
2. Select the check box for Enable Inline Crystal Reports.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 6-20: Configuring Order Management

This section discusses:

- Repricing Orders with Product Kits
- Adding Order Source Codes
- Defining Auto-Numbering for Reservation Back Order
- Defining Auto-Numbering for Supply Sources
- Defining a Default Hold Reason Code
- Defining Hold Code Security by Role

Task 6-20-1: Repricing Orders with Product Kits

In this PeopleSoft FSCM release, product kit components and configured kit components are now considered in estimated shipment/freight calculations. For existing sales orders with product kit components, the shipping weight and volume and the quantity fields were calculated as part of data conversion. However, the estimated shipment/freight was not automatically upgraded because doing so might have had a financial effect on previously quoted sales orders. To obtain the correctly estimated shipment/freight calculation for existing product kits, you will need to reprice the orders online or via a batch job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-20-2: Adding Order Source Codes

In this PeopleSoft FSCM release, vendor managed functionality was added to PeopleSoft Inventory. Those generated orders will be identified by the source code value *VMI*. You will need to update the order source codes to include *VMI* as a valid source code, if you have not done so already.

To add order source codes:

1. Select Set Up Financials/Supply Chain, Product Related, Order Management Foundation, Order Source Codes.
2. Add the source code *VMI* as follows:
   a. For each setID, enter *VMI* in the Source Code field.

b. Click Add.

c. Enter *01/01/1900* as the effective date.

d. Enter *Vendor Managed Inventory Orders* for the description.

e. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-20-3: Defining Auto-Numbering for Reservation Back Order

This section discusses:

- Understanding Auto-Numbering for Reservation Back Order Plans and Rules
- Setting Up Auto-Numbering for Reservation Back Order Plans
- Setting Up Auto-Numbering for Reservation Back Order Rules

Understanding Auto-Numbering for Reservation Back Order Plans and Rules

You can choose how to fulfill your orders using reservation back order plans and rules. If you want to automatically number these plans and rules, rather than defining them explicitly, set up the automatic numbering scheme for each type. Complete the following steps to set up the plans and rules.

Setting Up Auto-Numbering for Reservation Back Order Plans

To verify and set up automatic numbering for reservation back order plans:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. In the Number Type field, select *Back Order/Reservation Plan*.
3. Click Search.

   If no data is returned, you do not have auto-numbering set up for reservation back order plans.
4. If you want to set up auto-numbering for reservation back order plans, follow these steps:

   a. Click Add a New Value.

   b. Enter a valid setID.

   c. In the Field Name field, select *TRFT_RULE_CD*.

   d. Enter a three-character value in the Start Seq field.

   e. Add values in the Max Length,Description,and Last Number Issued fields.

   f. Select the Default option.

   g. Save the auto-numbering rule, if applicable.

   h. Repeat these steps for each setID.

Setting Up Auto-Numbering for Reservation Back Order Rules

To verify and set up auto-numbering for reservation back order rules:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. In the Number Type field, select *Back Order/Reservation Rule.*
3. Click Search.

   If no data is returned, auto-numbering is not set up for reservation back order rules.
4. If you want to set up auto-numbering for reservation back order rules, follow these steps:
   a. Click Add a New Value.
   b. Enter a valid setID.
   c. In the Number Type field, select *Back Order/Reservation Rule.*
   d. Click Add.
   e. In the Field Name field, select *TRFT_SET_ID*.
   f. Enter a three-character value in the Start Seq field.
   g. Enter values in the Max Length, Description, and Last Number Issued fields.
   h. Select the Default option, if applicable.
   i. Save the auto-numbering rule.
   j. Repeat these steps for each setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-20-4: Defining Auto-Numbering for Supply Sources

This section discusses:

- Understanding Auto-Numbering for Alternate Sources of Supply
- Setting Up Auto-Numbering for Alternate Sources of Supply Plans
- Setting Up Auto-Numbering for Alternate Sources of Supply Rules

Understanding Auto-Numbering for Alternate Sources of Supply

You can choose to source your orders based on purchase order, requisition, material stock request, or production order. To determine how to source your orders, you need a sourcing arbitration plan. To control what sources are available to your orders, you need defined sourcing rules. If you want to automatically number these plans and rules rather than explicitly defining names for them, set up the automatic numbering scheme for each type (plans and rules).

Complete the steps that follow to set up and verify your auto-numbering schemes.

Setting Up Auto-Numbering for Alternate Sources of Supply Plans

To verify and set up auto-numbering for alternate sources of supply plans:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. For Number Type, select *Alt Source of Supply Plan.*
3. Click Search.

   If no data is returned, you do not have auto-numbering set up for Alternate Sources of Supply Arbitration Plans.
4. If you want to set up auto-numbering for Alternate Sources of Supply Arbitration Plans, follow these steps:
   a. Click Add a New Value.
   b. Enter a valid setID.
   c. In the Number Type field, select *Alt Sources of Supply Plan.*
   d. Click Add.
   e. In the Field Name field, select *TRFT_RULE_CD.*
   f. Enter a three-character value in the Start Seq field.
   g. Enter values in the Max Length, Description, and Last Number Issued fields.
   h. Select the Default option.
   i. Save the auto-numbering rule, if applicable.
   j. Repeat the steps for each setID.

Setting Up Auto-Numbering for Alternate Sources of Supply Rules

To verify and set up auto-numbering for Alternate Sources of Supply Rules:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. In the Number Type field, select *Alt Sources of Supply Rule.*
3. Click Search.

   If no data is returned, you do not have auto-numbering set up for Alternate Sources of Supply Rules.
4. If you want to set up auto-numbering for Alternate Sources of Supply Rules, follow these steps:
   a. Click Add a New Value.
   b. Enter a valid setID.
   c. In the Number Type field, select *Alt Sources of Supply Rule.*
   d. Click Add.
   e. In the Field Name field, select *TRFT_SET_ID.*
   f. Enter a three-character value in the Start Seq field.
   g. Enter values in the Max Length, Description, and Last Number Issued fields.
   h. Select the Default option.
   i. Save the auto-numbering rule, if applicable.

j. Repeat these steps for each setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-20-5: Defining a Default Hold Reason Code

This section discusses:

- Defining a Hold Reason Code
- Setting the Hold Reason Code as Default

Defining a Hold Reason Code

A default hold reason code value must be set for automatic hold processing for each PeopleSoft Order Management business unit. This user-defined default value is used whenever a system-generated hold code is applied. Before the default value can be set, the reason code value must be added to the list of valid reason codes.

See PeopleSoft Order Management 9.1 PeopleBook, Setting Up PeopleSoft Order Management Business Units, Setting Up Order Management Business Units, Establishing Hold Processing.

To add a new reason code value:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes.
2. Select the Add a New Value tab.
3. Enter a setID value.
4. Select *Reason Type Order/Quote Hold*.
5. Enter a value in the Reason Code field.
6. Click Add.
7. Enter an effective date and description.
8. Click Save.
9. Repeat steps 4 through 8 for every valid setID.

Setting the Hold Reason Code as Default

After you have entered at least one Order/Quote Hold reason code, you can set the default value on the PeopleSoft Order Management business units.

To set the default hold reason code:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Order Management, Order Management Definition.
2. Enter a PeopleSoft Order Management business unit.
3. Click Search.
4. Click the Hold Processing link at the bottom of the page.

5. In the Automatic Hold group box, select a value for the Hold Reason Code field.
6. Click Save.
7. Repeat steps 2 through 6 for every valid business unit.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-20-6: Defining Hold Code Security by Role

In previous PeopleSoft FSCM releases, no security was available for the application or removal of holds associated with quotes and orders. Now, you must assign hold codes to user roles to control the holds that a role can manage.

See PeopleSoft Order Management 9.1 PeopleBook, Implementing PeopleSoft Order Management, Implementing PeopleSoft Order Management Options, Defining Hold Code Security by Role.

To define hold code security by role:

1. Select Set Up Financials/Supply Chain, Security, Hold Security by Role.
2. Click the Add a New Value tab.
3. Enter a setID.
4. Enter a role name.
5. Click Add.
6. Add a row for each hold code value that the role can manage.
   a. Select the Add Authority check box if the role has the authority to add quote and order holds.
   b. Select the Release Authority check box if the role has the authority to release quote and order holds.
   c. Select the Delete OM Hold check box if the role has the authority to delete quote and order holds.
7. Click Save.
8. Repeat steps 3 through 7 for each valid setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-21: Configuring Attachments

This section discusses:

- Understanding Attachments
- Configuring an Attachment Server
- Converting Order Management Attachments

Understanding Attachments

The attachment handling functionality for PeopleSoft Order Management has changed in this PeopleSoft FSCM release to use more of the built-in PeopleSoft PeopleTools attachment functionality. These products no longer use the URL Maintenance functionality. If you used attachments before this upgrade, you will need to perform some additional configuration to enable the new functionality.

Task 6-21-1: Configuring an Attachment Server

If you use attachments with other products, you may already have servers set up as a result of the upgrade. You need to confirm that a server has been selected as your default server and that your attachments reside on that server. If you did not use attachments with other products, you have two choices; you can either configure an FTP server to store your attachments, or you can have your attachments stored within the database (referred to as the database server in the following text).

To review or configure a defined attachment server, select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments. Your defined servers will appear on this page if they are already defined. You can use any of the servers as your attachment server. If you select an FTP server, you will need to move your attachments from their current location to the PATHNAME indicated on the page for the FTP server. Alternatively, you could configure your current attachment location as an FTP server (your system administrator should help you with this task).

If you do not have any servers defined, you may want to define an FTP server or a database server as your attachment server. If you select the database server, the remaining information appears by default when you add it to the list; no additional configuration is required. If you select an FTP server, you will need to know the FTP user name and password, the FTP server name, and the FTP directory location if it is not the FTP login default. This information should be obtainable from your system administrator.

Once your servers are defined, choose one server as the Active Server. The Active Server is used as the location for any new attachments after the upgrade is completed. Note that only attachments from this point forward are affected. Any previously attached files will continue to be accessed from the server on which they were stored.

Note. The term *Active Server* defines the specific server that can now create attachments. Other servers may be operational and can be used for retrieving existing attachments.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-21-2: Converting Order Management Attachments

This section discusses:

- Understanding Converting Attachments
- Converting Remaining Attachments

Understanding Converting Attachments

In this step, you run a report that lists any converted attachments with invalid file names that contain illegal characters. A set of manual steps is provided to convert invalid file attachments to the new naming conventions. The report that you run in this step based on server information that you created for your Active Server also updates information about the successfully converted attachments used by the file attachment utility.

The following table shows the subdirectories that are tied to the listed PeopleSoft Order Management components and indicates where the attachments for those components will reside on your Active Server. You must migrate your attachments to their appropriate locations on the Active Server for these attachments to be accessible within the online system.

Component	Description	Subdirectory
CUST_ATT	Customer Attachments	Customer
ORDENT_FORM	Order Entry Form	SalesOrder
PROD_ATT	Product Attachments	Product
RMA_FORM	RMA Header	RMA
SCON_HDR_ATT	Buying Agreement Header Attachment	BuyingAgreement
SCON_LINE_ATT	Buying Agreement Line Attachment	BuyingAgreement

Converting Remaining Attachments

To convert remaining attachments:

1. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
2. Run the Attachment Exceptions report, UVEPP105.SQR.

   This report lists the name of the converted attachment and the invalid file name.
3. For every entry in the report, complete the following steps, as appropriate.
4. For buying agreements, select Order Management, Buying Agreements, Create/Update Buying Agreement.
   a. Select the Find an Existing Value tab.
   b. Enter the setID and buying agreement ID provided in the report and click Search.
   c. For buying agreement header attachments, click the Attachments link from the Header Menu drop-down list box to access header attachments.
   d. For buying agreement line attachments, select the line number provided in the report and then click the Attachments link from the Line Menu drop-down list box to access line attachments.
5. For customers, select Customers, Customer Information, General Information.
   a. Select the Find an Existing Value tab.
   b. Enter the setID and customer ID provided in the report and click Search.
   c. Click the Attachments link from the General Info Links drop-down list box to access attachment information.
6. For orders, select Order Management, Quotes and Orders, Create/Update Order.
   a. Select the Find an Existing Value tab.
   b. Enter the business unit and order number provided in the report and click Search.

c. For order header attachments, click the Notes/Attachments link from the Header Menu drop-down list box to access Header Notes/Attachment.

d. For order line attachments, select the line number provided in the report and then click the Notes/Attachments link from the Line Menu drop-down list box to access Line Notes/Attachment.

e. For order schedule attachments, select the line number provided in the report and then click the Shipment Scheduleslink.

f. Select the schedule number provided in the report.

g. Click the Notes/Attachments link from the Schedule Menu drop-down list box to access Schedule Notes/Attachment.

7. For products, select Products, Identify Product Details, Attachments.

   a. Enter the setID and product ID provided in the report.

   b. Click Search.

8. For RMA, select Customer Returns, Create/Update RMA.

   a. Select the Find an Existing Value tab.

   b. Enter the business unit and RMA number provided in the report and click Search.

   c. For RMA header attachments, click the Header Notes/Attachmentslink to access the RMA Header Notes/Attachments page.

   d. For RMA line attachments, click the RMA Linelink for the line number provided in the report.

   e. Click the Line Notes/Attachmentslink to access the RMA Line Notes/Attachments page.

9. Modify the invalid entry to a valid filename.

10. Save the page.

11. Rename the attachment to match the name you updated on the attachments page.

12. Migrate the attachment to the attachment server using the table in the previous step as a guideline for where the attachment should be located.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 6-22: Completing Strategic Sourcing Setup

This section discusses:

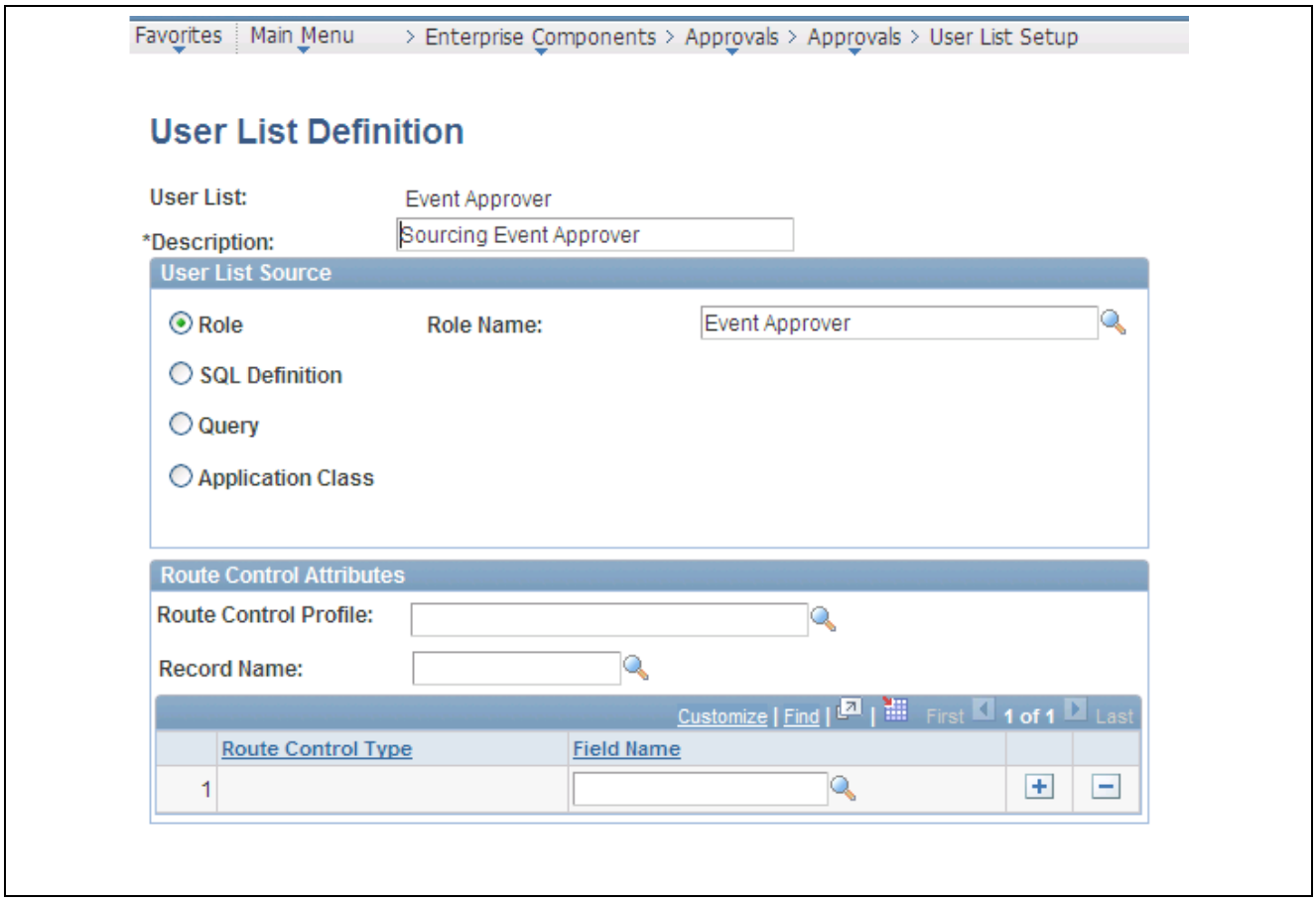
- Defining User Lists for Event and Plan Approvals
- Defining Sourcing Approval Processes
- Defining Auto-Numbering for Sourcing Plan ID

Task 6-22-1: Defining User Lists for Event and Plan Approvals

This PeopleSoft FSCM release includes a plan approval process. You must use this process if you are creating and submitting any sourcing plans. You also need to re-create your user list definition for the Event Approval process. You must complete this step before you define the Event Approval and Plan Approval processes in the next step.

To define a user list:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. On the User List Definition page, add a user list named *Event Approver* if it does not already exist, as shown in the following example.



User List Definition page

3. Enter a description if it does not already exist.
4. Select the Role option.
5. In the Role Name field, enter *Event Approver* or a custom role name that you have created for your organization.
6. Click Save.
7. Repeat steps 1 through 6, substituting *Plan Approver* for *Event Approver.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Strategic Sourcing	All	All

Task 6-22-2: Defining Sourcing Approval Processes

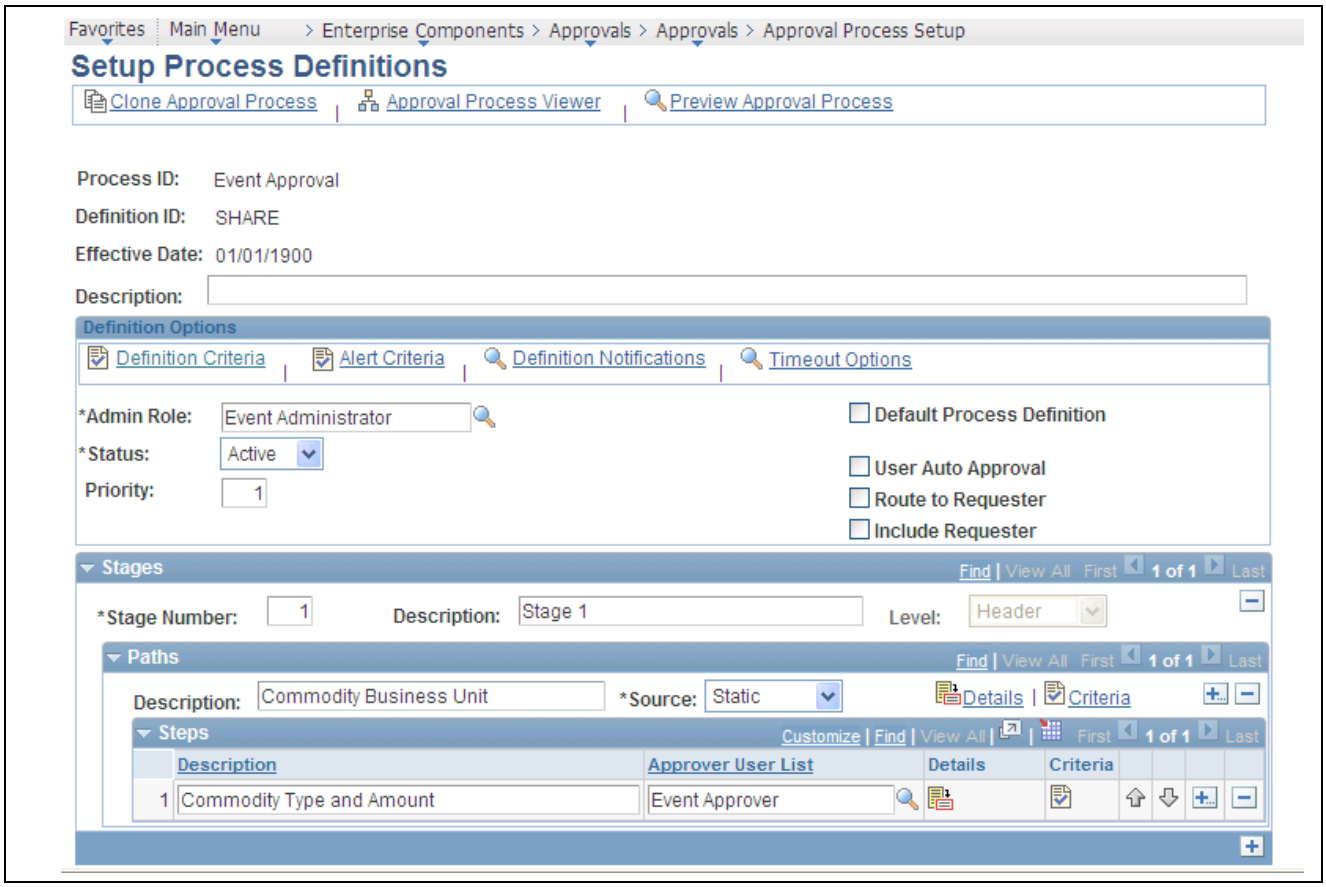
After you have defined your approval user lists, you need to create approval process definitions to which these user lists will be associated. In this step, you will create the approval process definitions that use the user lists that you created in the previous step.

Note. You must create approval process definitions for each default setID that corresponds to a Strategic Sourcing business unit.

To define the sourcing approval processes:

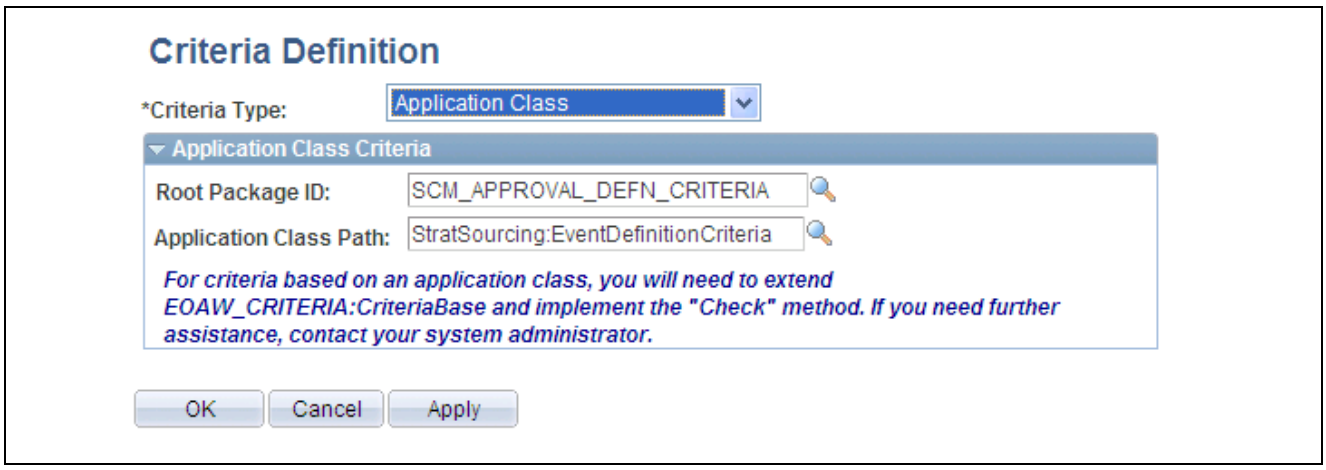
1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Add a new approval process definition for each setID.

   For the event submittal process to work, the approval process ID must be *Event Approval* and the definition ID must be the setID for which you are creating the approval process . However, you may customize the criteria information to fit your business needs. On the Setup Process Definitions page, you may define different approval criteria for paths and steps. You may or may not want to define criteria at every level, depending on your business process.



Setup Process Definitions page

3. Enter the *Admin Role*.
4. Click the Definition Criteria link to update the criteria type on the Criteria Definition page, as shown.



Criteria Definition page

5. Click OK to return to the Setup Process Definitions page, and then click Save.
6. In the Paths section, click the Details link to add path information, if any.
7. Click the Criteria link to add the criteria for the approval path, if any.
8. Click OK to return to the Approval Path Definition page.

9. Click OK to return to the Setup Process Definitions page, and then click Save.
10. In the Steps section, click the Details link to add approval step details.
11. Click the Criteria link to enter the approval criteria for the step.
12. Click OK to return to the Approval Path Definition page.
13. Click OK to return to the Setup Process Definitions page, and then click Save.
14. To insert additional stages, paths, or steps, click the add (+) button related to the appropriate section and repeat steps 4 through 13 to add details and criteria where needed.
15. Create the Plan Approval process definition by repeating steps 1 through 14, substituting *Plan Approval* for *Event Approval.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Strategic Sourcing	All	All

Task 6-22-3: Defining Auto-Numbering for Sourcing Plan ID

Complete the following steps to verify and define your auto-numbering schemes for sourcing plans.

To verify and define auto-numbering for sourcing plans:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. From the Number Type drop-down list, select *Sourcing Plan ID.*
3. Click Search.

   If no data is returned, you do not have auto-numbering set up.
4. To set up auto-numbering, complete these steps:
   a. Click Add a New Value.
   b. Enter a valid setID.
   c. From the Number Type drop-down list, select *Sourcing Plan ID.*
   d. Click Add.
   e. In the Field Name field, select *AUC_PLAN_ID.*
   f. In the Start Seq field, enter a three-character value.
   g. Enter values in the Max Length, Description, and Last Number Issued fields.
   h. Select the Default option.
   i. Save the auto-numbering rule.
   j. Repeat the steps for each setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Strategic Sourcing	All	All

Task 6-23: Reviewing eProcurement Setup

This task applies only if you are using Dynamic Dispatcher for dispatching purchase orders. Verify that the root package ID and application class path are pointing to the appropriate class. The class values below are the default PeopleSoft values. However, you can use your own custom application class.

To verify the root package ID and application class path:

1. Select eProcurement, Administer Procurement, Select Maintain Supplier Integration, Select EDX PO Dispatch Types.
2. In the EDX Dispatch Type field, enter *CXML12* and click Search.

   The default root package ID and application class path for CXML12 are:

   - Root Package ID: SCM_PV_PO_DISPATCH
   - Application Class Path: CxmlPurchaseOrder
3. In the EDX Dispatch Type field, enter *XCBL30* and click Search.

   The default root package ID and application class path for XCBL30 are:

   - Root Package ID: SCM_PV_PO_DISPATCH
   - Application Class Path: XcblPurchaseOrder

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eProcurement	All	All

Task 6-24: Completing Services Procurement Setup

This section discusses:

- Understanding the sPro Upgrade
- Running the Post-Upgrade sPro Queries
- Reviewing the Post-Upgrade sPro Queries
- Verifying User Lists for Timesheet Approval
- Defining the Timesheet Approval Process

- Setting Up Automatic Self-Approval for Timesheets
- Verifying User Lists for Expenses Approval
- Defining the Expenses Approval Process
- Verifying User Lists for Progress Log Approval
- Defining the Progress Log Approval Process
- Activating HCM Integration in sPro
- Defining a Default Business Unit
- Defining Requester Defaults
- Defining Service Coordinator Defaults
- Adding Replacement Work Order Approval
- Setting Auto-Numbering for Timesheets
- Setting Auto-Numbering for Progress Logs
- Reconciling sPro Notification Templates
- Reviewing Time and Progress Log Templates
- Reviewing Vendor Setup Information
- Running the sPro Approvals Post-Upgrade Process

Understanding the sPro Upgrade

In this release, expenses have been decoupled from time. Additionally, work order amounts are now broken into labor and expense amounts for better tracking against tolerance checks. For customers upgrading from previous releases, tolerance checking is still based on the total work order amount. Furthermore, where expenses have been entered, users navigating to the work order page will see “Expense Amount Not Available” because the data conversion process is not able to determine how much should be allocated to labor versus expenses for tolerance checking purposes.

The appearance of requisition and work order skills matrix/competencies information has also changed in this release. For existing transactions, the competencies will appear and will be stored in the long text field and the skills matrix grid will be blank. For new transactions, all the competencies will be stored in the skills matrix grid.

Work order will track distributions by percentage or actual allocation in the new release. During the upgrade process, the default value for percent allocation was automatically assigned to all existing work orders so that you can continue to use your existing transactions going forward.

In PeopleSoft FSCM 9.1, Approval Workflow Engine has been implemented for timesheets, expenses, and progress logs. In addition, email approvals are available for timesheets, expenses, progress logs, and work orders. For customers upgrading from previous releases, the Approval Process Definition has to be defined for the processes SP_TIMESHEET, SP_EXPENSE, and SP_PLOG. Each Approval Process Definition can have various stages, paths, and steps and criteria, or self-approval criteria can be defined for each path and step which will determine the approval routings.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

Task 6-24-1: Running the Post-Upgrade sPro Queries

In this step, you run the PeopleSoft Services Procurement post-upgrade queries.

To run the post-upgrade sPro queries:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following queries:

```
sPro Time Template for OT Rules, UPG_SPQ707
sPro Time Template Calendars, UPG_SPP708
sPro Activity by Service Type, UPG_SPP710
sPro Activities by Service, UPG_SPQ711
sPro Service Activities, UPG_SPP714
sPro Service Activity X-Ref, UPG_SPP715
sPro WO Approval Process, UPG_SPP716
Time Approval, UPG_SPZ01
Progress Log Approval, UPG_SPZ02
Expense Approval, UPG_SPZ03
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-2: Reviewing the Post-Upgrade sPro Queries

This section discusses:

- Reviewing Query UPG_SPQ707
- Reviewing Query UPG_SPP708
- Reviewing Query UPG_SPP710
- Reviewing Query UPG_SPQ711
- Reviewing Query UPG_SPP714
- Reviewing Query UPG_SPP715
- Reviewing Query UPG_SPP716
- Reviewing Query UPG_SPZ01
- Reviewing Query UPG_SPZ02
- Reviewing Query UPG_SPZ03

Reviewing Query UPG_SPQ707

This report lists all the time templates that use overtime. The previous overtime rules are no longer used. Use the output of this query in conjunction with query UPG_SPP708 results to recreate new time reporting rules in the step titled Reviewing Time and Progress Log Templates.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

Reviewing Query UPG_SPP708

This report lists all the time reports grouped by time reporting period. You use this information to create calendars and time reporting rules, and to attach them to the appropriate time templates in the step titled Reviewing Time and Progress Log Templates. All new time reporting transactions require this setup.

Reviewing Query UPG_SPP710

This informational report lists the activities, by service type, that were added as part of the upgrade process for customers who are not integrated with PeopleSoft Project Costing. Before this release, project activities were used in the time sheets. Now, non-project activities need to be defined and mapped to service types. The upgrade process converted all the existing activities on time sheets to activities by service type.

Reviewing Query UPG_SPQ711

This informational report lists the activities by service that were added as part of the upgrade process. Before this release, project activities defined as *Milestone* were used to create deliverables-based work orders with a settlement option of *Milestone.* Now, milestone activities are defined in PeopleSoft Services Procurement and are associated with a service. Then, work orders use these activities. The upgrade process inserted milestone activities used by the work order into activities by service for the service used by the work order.

Reviewing Query UPG_SPP714

This informational report lists all of the service activities defined in the system. In the previous release, resource-based activities were defined as project activities for PeopleSoft Services Procurement customers who are not integrated with PeopleSoft Project Costing. Similarly, deliverables-based activities with a settlement option of *Milestone* were also defined as project activities.

These activities are now defined in PeopleSoft Services Procurement as service activities. The upgrade process inserted these original activities into the services activities table with new activity IDs to avoid possible duplicates. This report lists the new activity ID along with the original activity description. You can use the results of this query, along with the results from query UPG_SPP715, to cross-reference the new service activities with the original project activities.

Reviewing Query UPG_SPP715

This is an informational report mapping the old project activity IDs to the new service activity IDs that were created during the upgrade process.

You can use the results of this query along with the results from query UPG_SPP714 to cross-reference the new service activities with the original project activities.

Reviewing Query UPG_SPP716

This report lists the setIDs for which work order approval process definitions must exist.

You will use the results of this query to create work order approval process definitions in the step titled Defining Work Order Approval Process.

Reviewing Query UPG_SPZ01

This report lists the setIDs for which timesheet approval process definitions must exist. You will use the results of this query to create timesheet approval process definitions in the step titled Defining the Timesheet Approval Process.

Reviewing Query UPG_SPZ02

This report lists the setIDs for which progress log approval process definitions must exist. You will use the results of this query to create progress log approval process definitions in the step titled Defining the Progress Log Approval Process.

Reviewing Query UPG_SPZ03

This report lists the setIDs for which expenses approval process definitions must exist. You will use the results of this query to create Expenses approval process definitions in the step titled Defining the Expenses Approval Process.

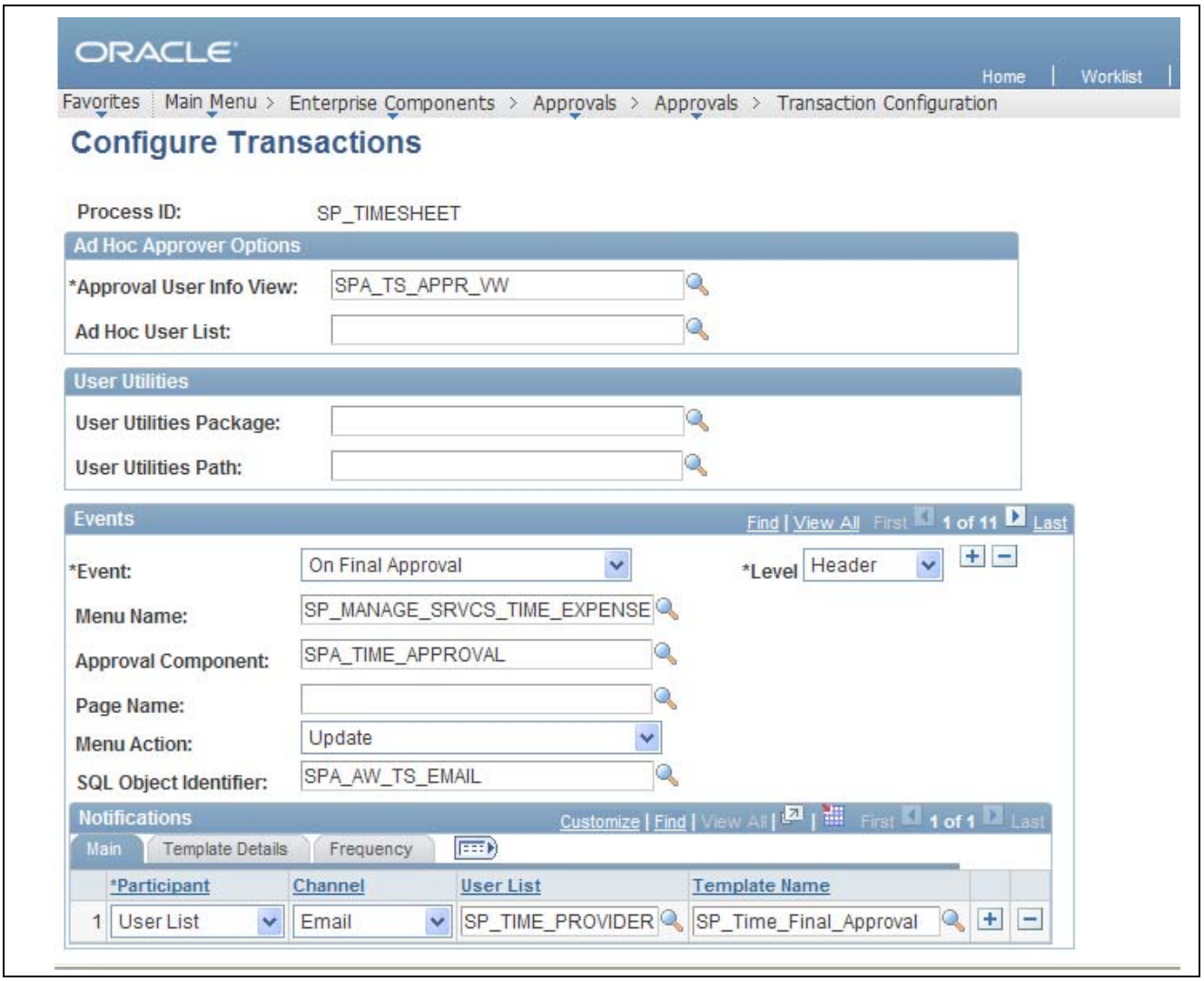
Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-3: Verifying User Lists for Timesheet Approval

In this step you verify user lists for timesheet approval.

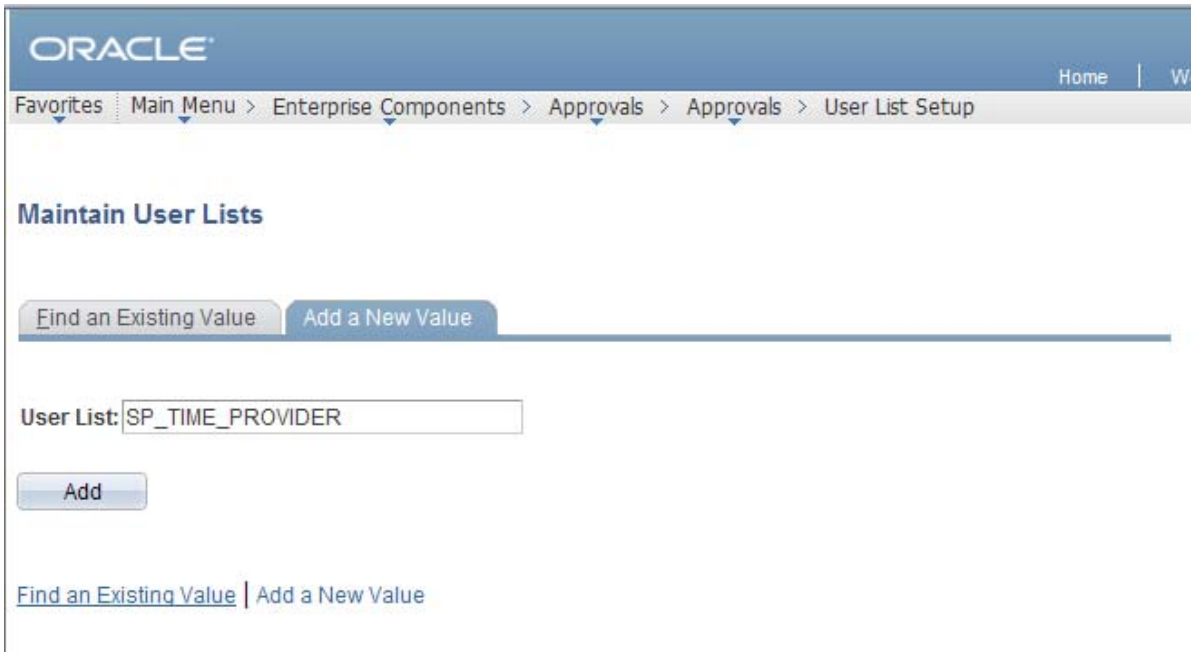
1. Select Enterprise Components, Approvals, Approvals, Transaction Configuration.
2. Edit the configuration for process ID SP_TIMESHEET.
3. Note the names of the user lists in the Notifications section of the Configure Transactions page.



Configure Transactions page: SP_TIMESHEET process

4. Select Enterprise Components, Approvals, Approvals, User List Setup.
5. On the Maintain User Lists page, make sure that all of the user lists used in the configuration for SP_TIMESHEET have been defined.

   If not, use the existing user lists in the transaction configuration or add the user lists.



Maintain User Lists page

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-4: Defining the Timesheet Approval Process

This section discusses:

- Understanding Timesheet Approval Process Setup
- Setting Up a User List
- Creating a Timesheet Approval Process Definition
- Defining the EMP_SERVLET URL

Understanding Timesheet Approval Process Setup

In this step, you add a timesheet approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ01 to determine the setIDs for which new timesheet approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the applicable steps below to update an existing approval process definition.

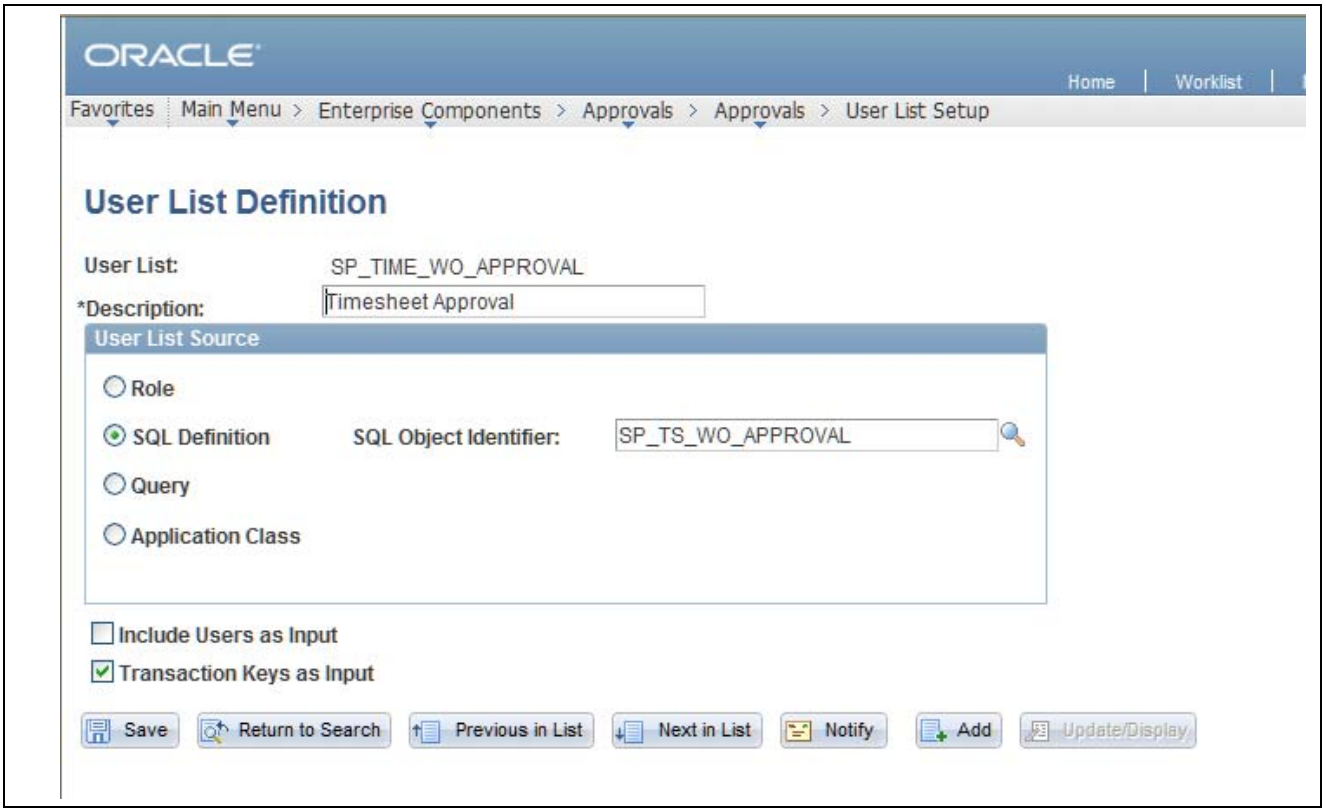
Setting Up a User List

To define the timesheet approval process:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

   In the example below, the user list SP_TIME_WO_APPROVAL is used for the approval process definition for timesheet approval.



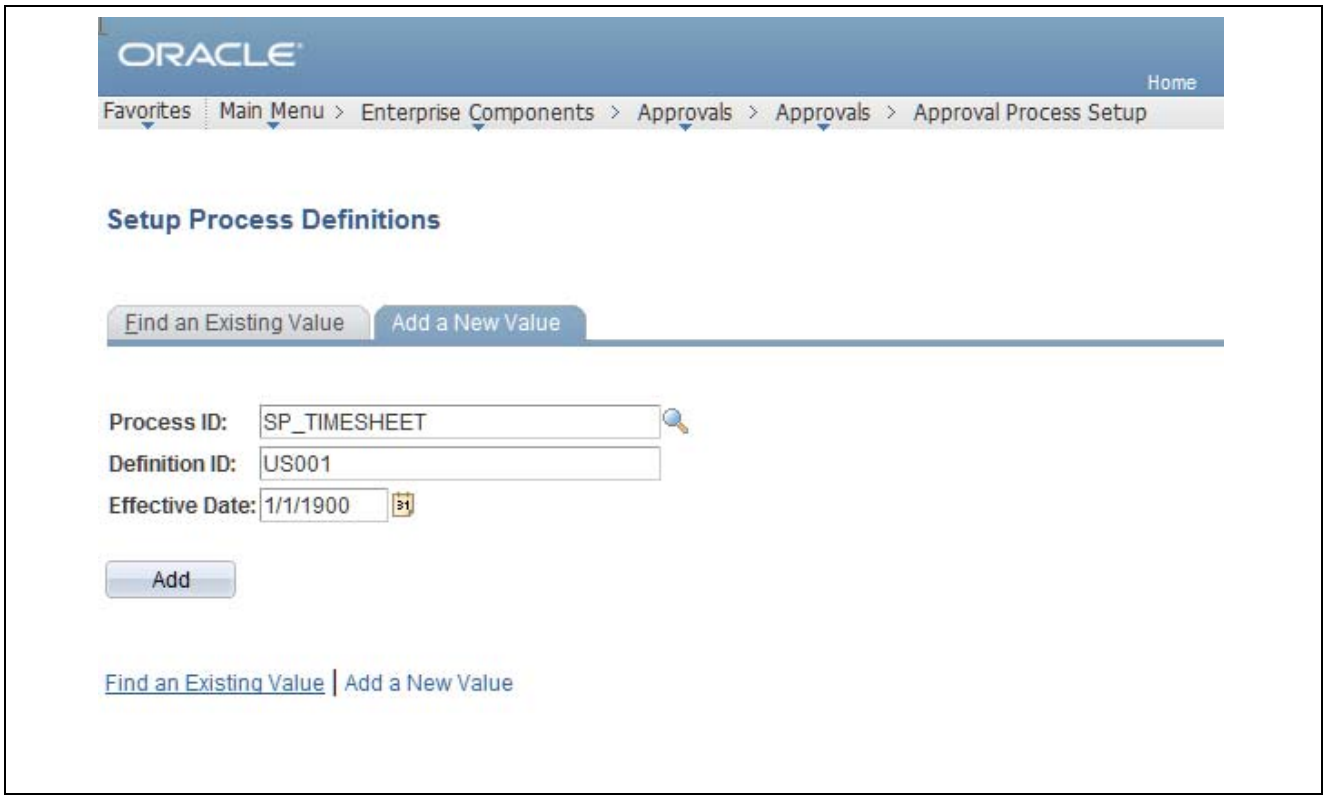
User List Definition page

Creating a Timesheet Approval Process Definition

You will need to create an approval process definition for each definition ID. Refer to the results of query UPG_SPZ01 for the list of definition IDs for which you should create a process definition.

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_TIMESHEET*.
4. In the Definition ID field, enter the Set ID for which the definition is being created.
5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_TIMESHEET*, the definition ID *US001*, and the effective date. Then click Add.

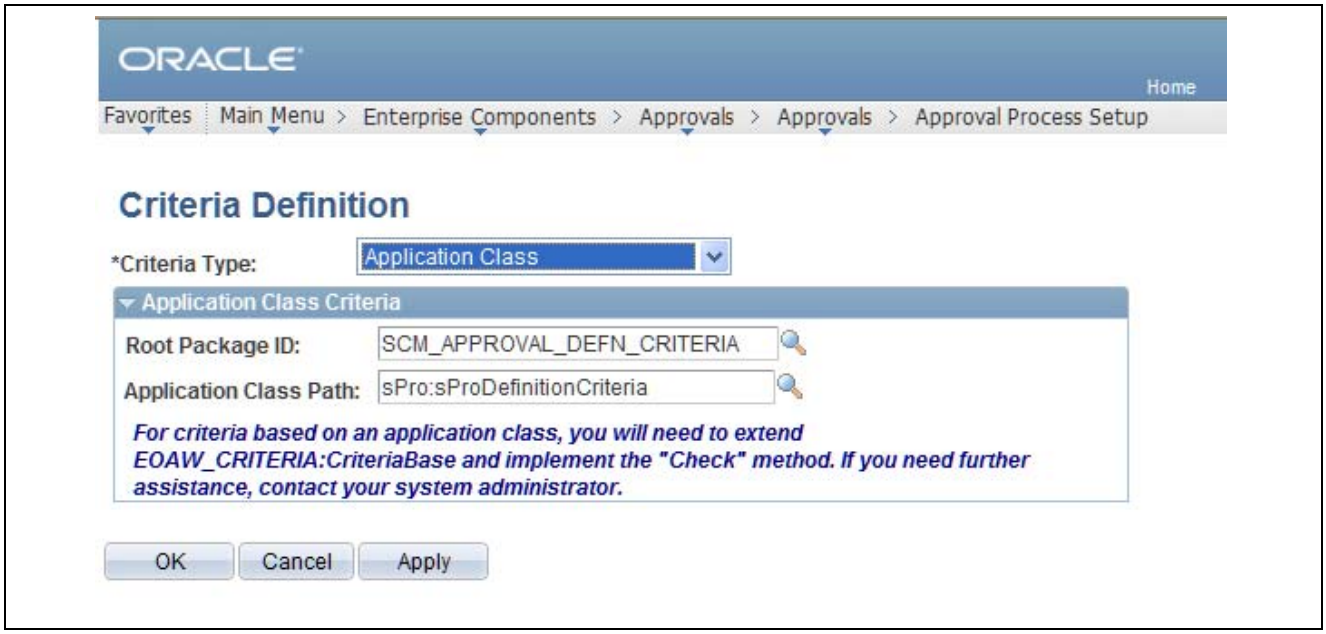


Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definitions page, click the Definition Criteria link.

   The Criteria Definition page appears.

7. For the Root Package ID field, select *SCM_APPROVAL_DEFN_CRITERIA*.
8. For the Application Class Path field, select *sPro:sProDefinitionCriteria*.

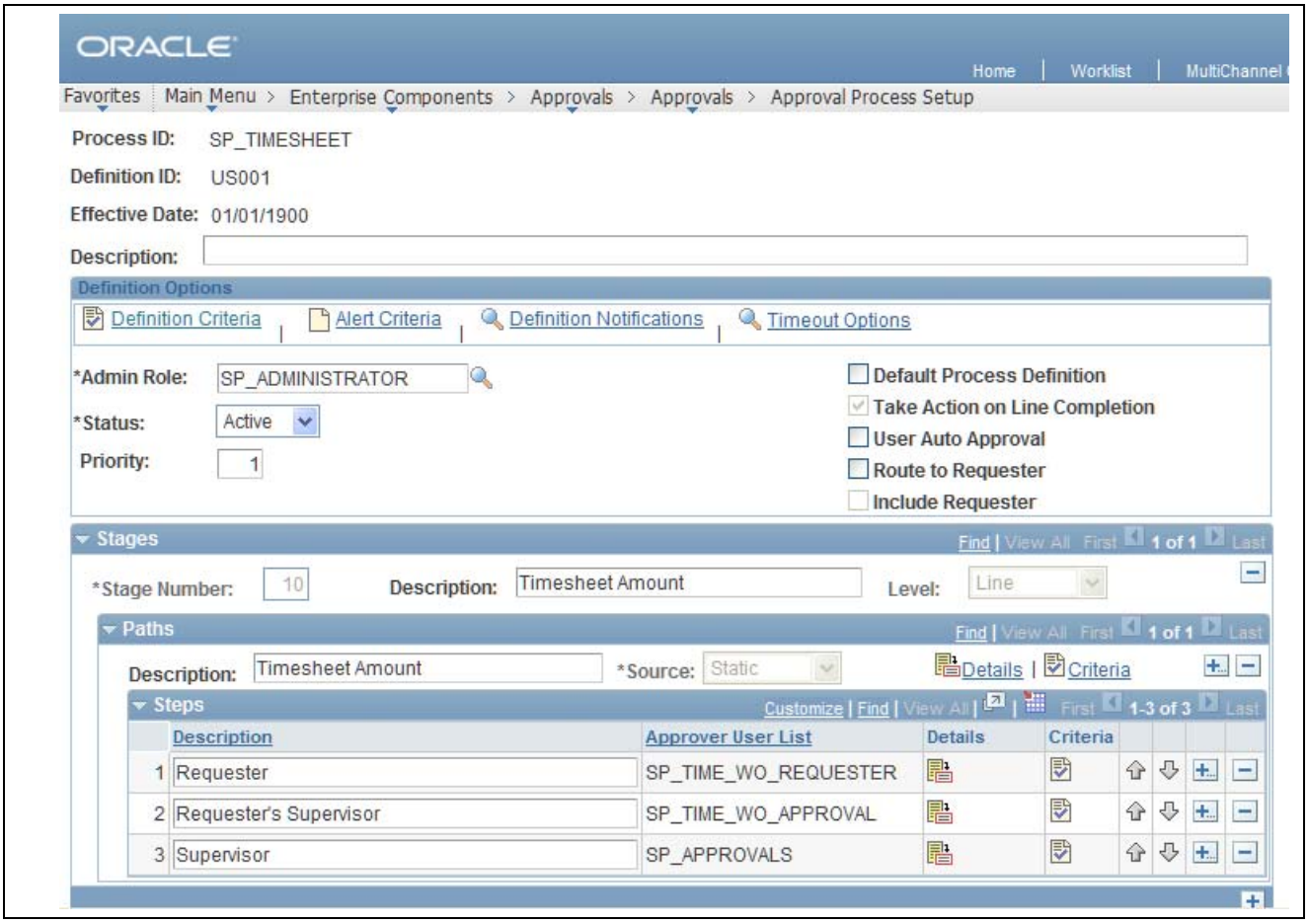


Criteria Definition page: Application Class Criteria

9. Click OK.

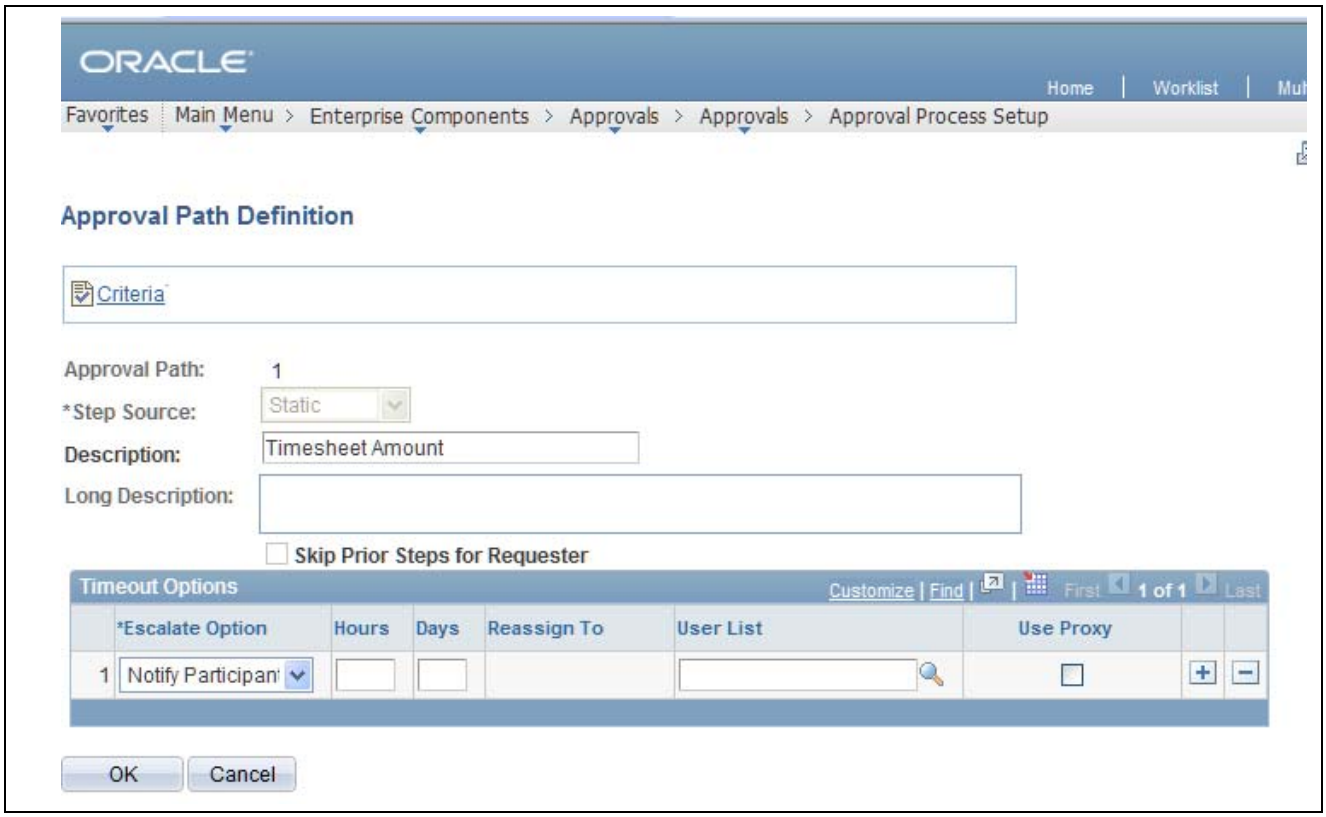
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    For example, this process definition has a Line stage and 3 steps defined.



Setup Process Definitions page: Stages and Paths

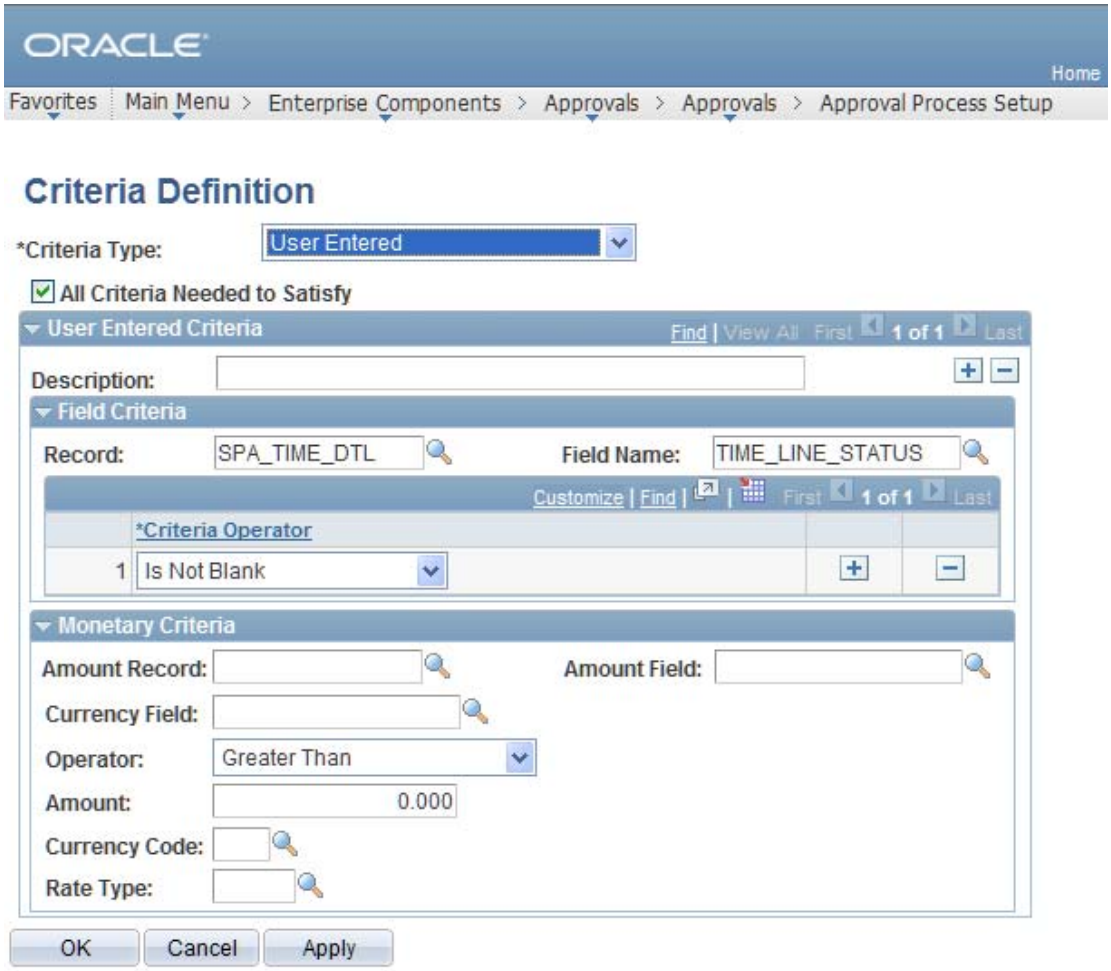
11. For each stage, enter a description and select a level of *Header* or *Line*.
12. For each path, enter a description and select the source as *Static* or *Dynamic*.
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.
14. Click the Details icon for each path and set up the path details, as required



Approval Path Definition page

15. Click the Criteria icon for each path and set up path criteria, as required.

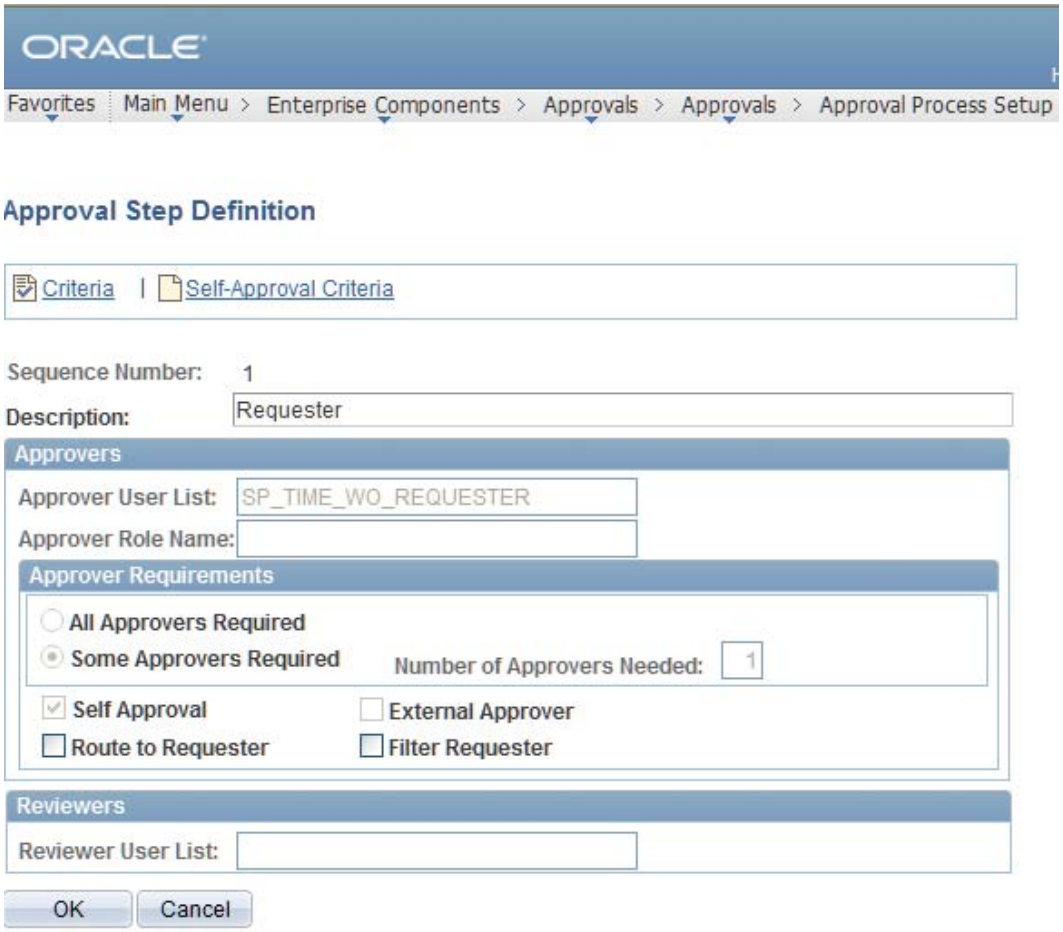
    For example, this path criteria definition has the field criteria defined with the record set to *SPA_TIME_DTL*, the field name set to *TIME_LINE_STATUS*, and the criteria operator set to *Is Not Blank*.



Criteria Definition page: Path Criteria

16. Click the Details icon for each step and set up the step details, as required.
17. Click the Self-Approval Criteria link to set up self-approval criteria.

    You can define field criteria or monetary criteria.

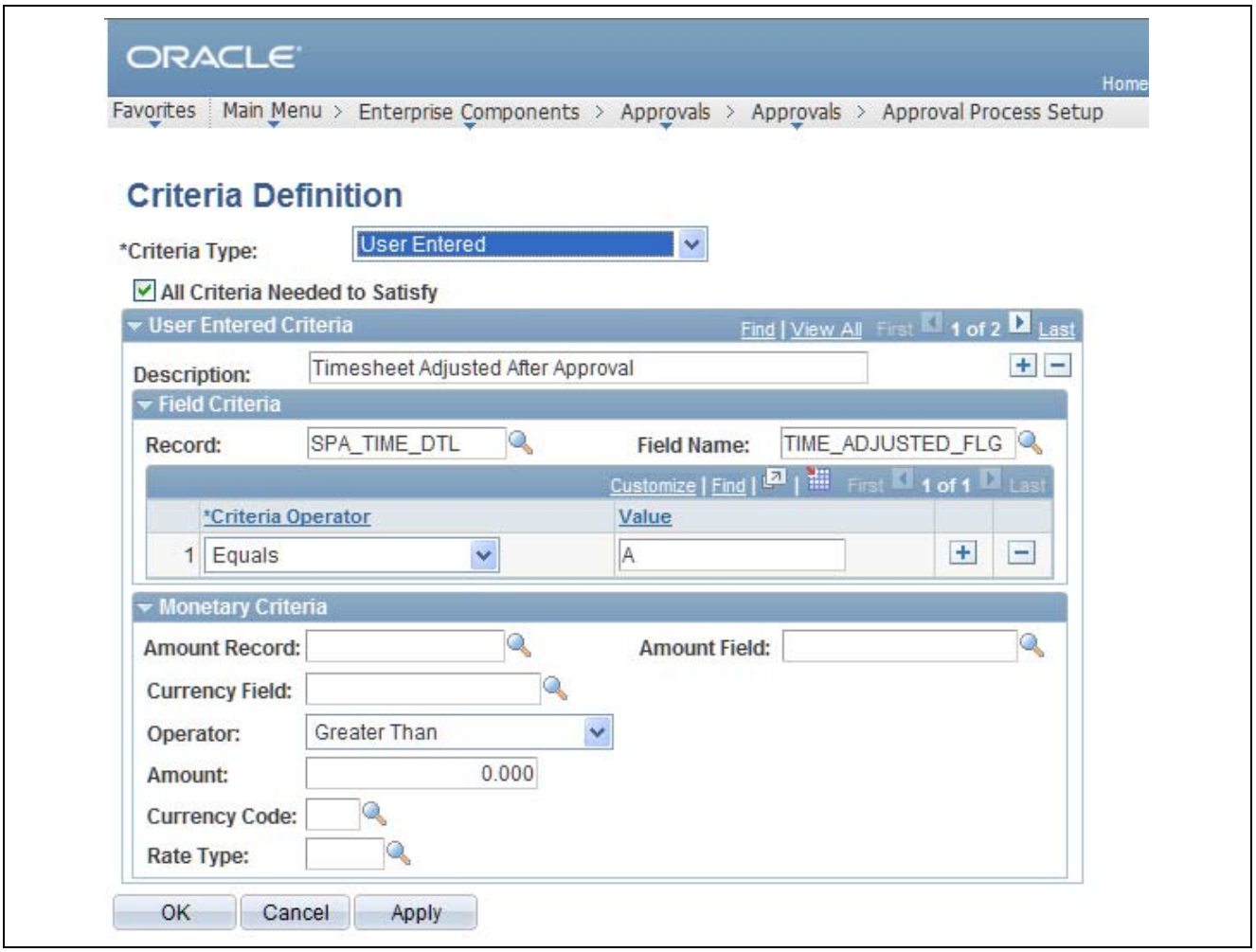


Approval Step Definition page

18. Click the Criteria icon for each step and set up step criteria, as required.

    You can define field criteria or monetary criteria.

    In this example, for approvals after adjustments to work, the following field criteria should be set up. Set the record to *SPA_TIME_DTL*, the field name to *TIME_ADJUSTED_FLG*, the criteria operator to *Equals*, and the value to *A*.



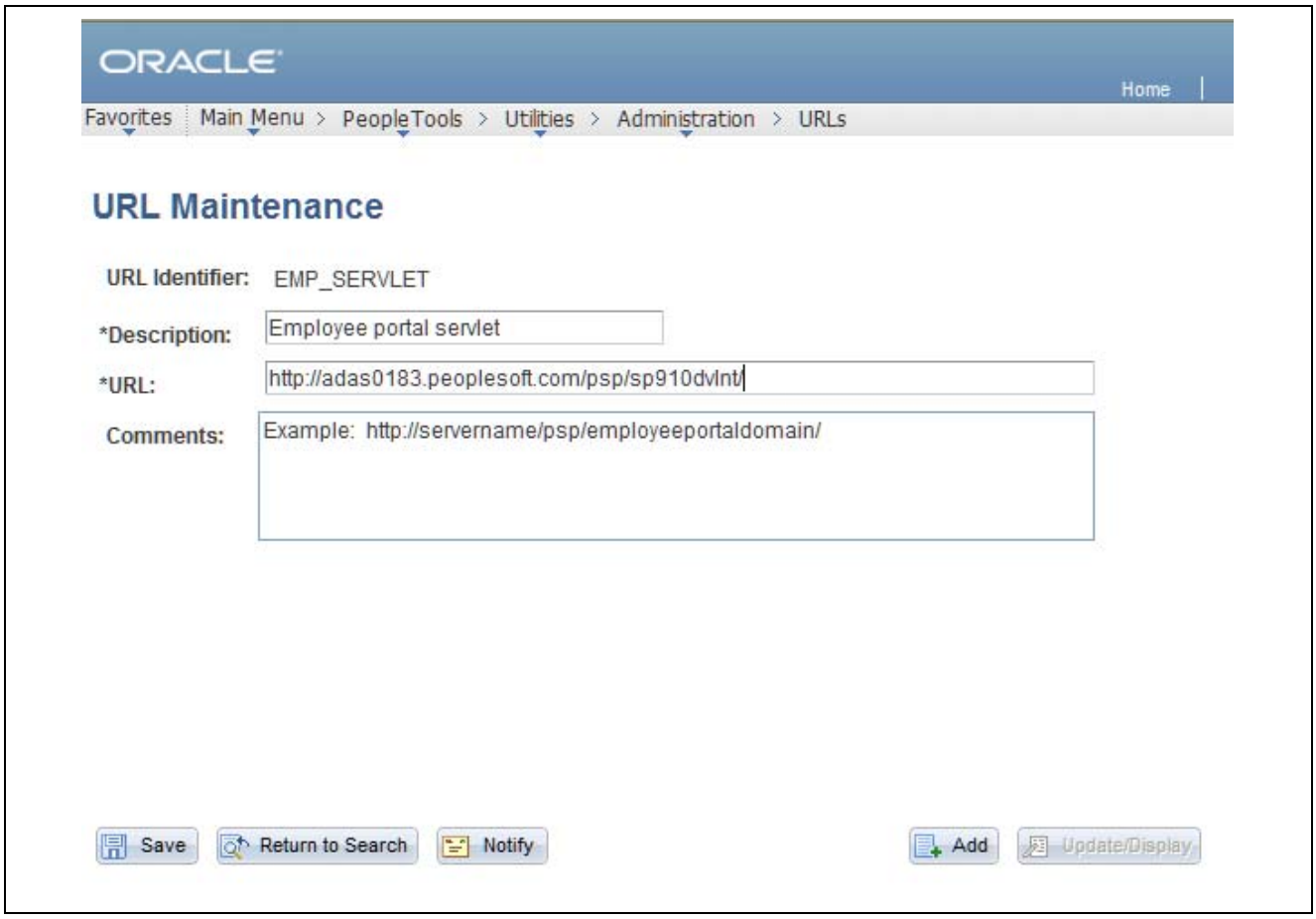
Criteria Definition page: Timesheet Adjusted After Approval criteria

19. Repeat steps 1 through 18 for each approval process definition that you need to create.

Defining the EMP_SERVLET URL

To define the EMP_SERVLET URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.
3. To define the EMP_SERVLET URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-5: Setting Up Automatic Self-Approval for Timesheets

This section discusses:

- Understanding Automatic Self-Approval Setup
- Creating and Assigning the Self-Approval Role
- Creating a User List
- Creating an Approval Process Definition and Assigning the User List

Understanding Automatic Self-Approval Setup

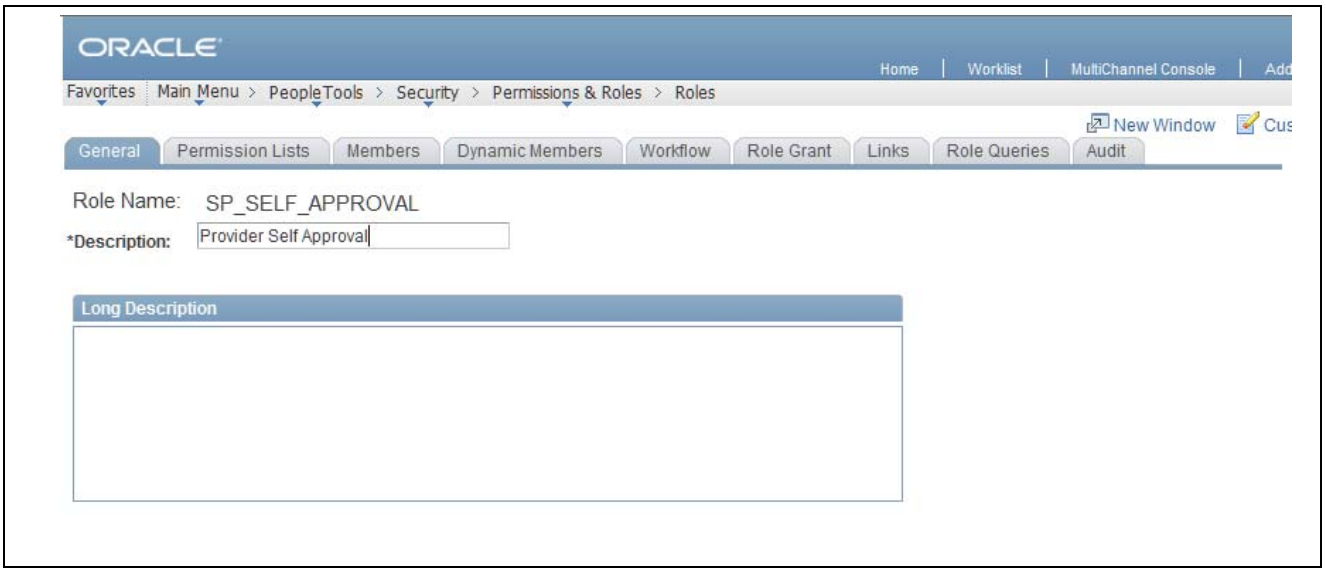
For all providers listed in the results of query UPG_SPZ01 who had the Auto Approve Timesheet option selected, complete this task to set up self-approvals so that the timesheets will be automatically approved.

Creating and Assigning the Self-Approval Role

To create and assign the self-approval role:

1. Select PeopleTools, Security, Permissions & Roles, Roles.
2. Select the Add a New Role tab.
3. Enter the name of the new role that you want to create.

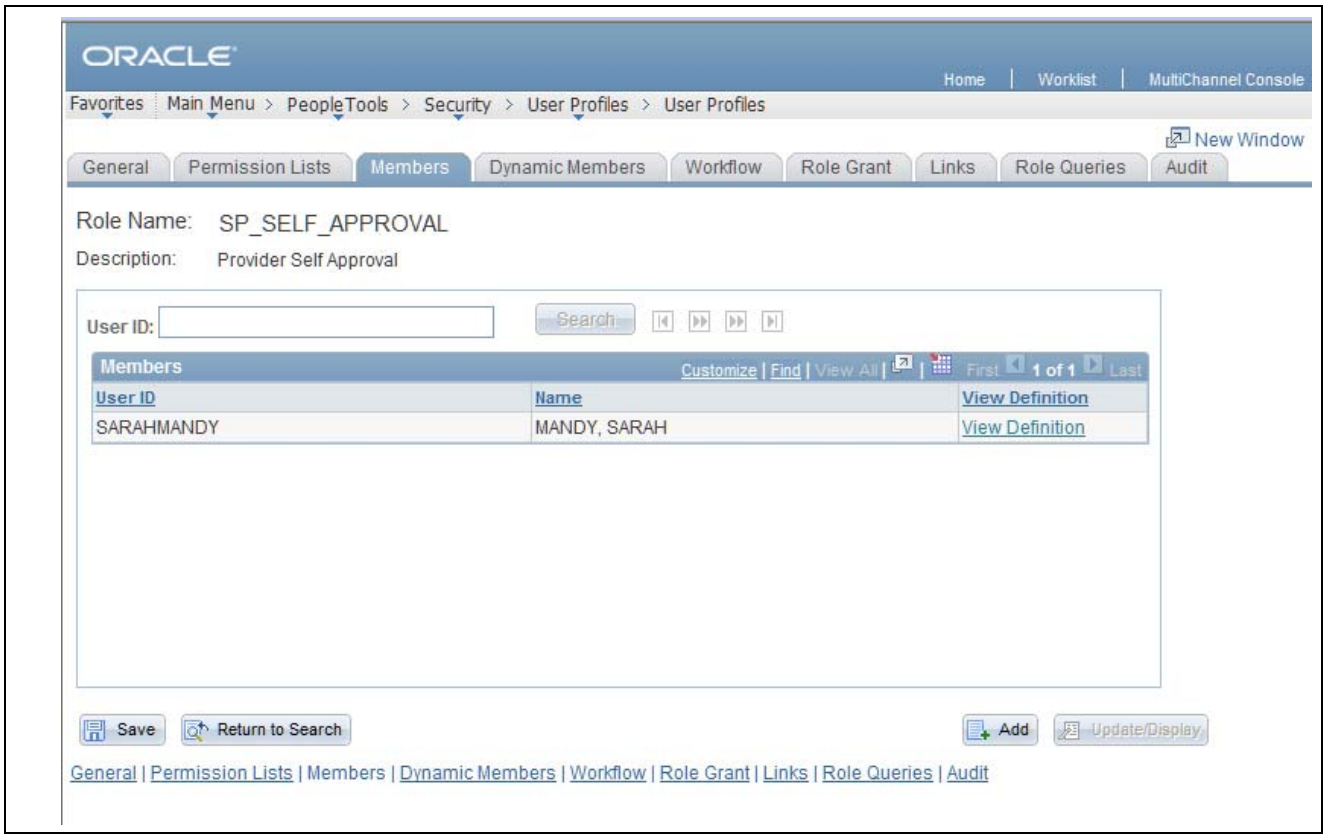
   In this example, the role SP_SELF_APPROVAL is created.



Roles page

4. Enter a description for the role.
5. Click Save.
6. Select PeopleTools, Security, User Profiles, User Profiles.
7. Select the Find an Existing Value tab.
8. Enter the user ID of a user to whom the new role needs to be assigned and click Search.
9. Select the Roles tab.
10. Click the Add (+) button to add the new role.
11. Click Save.

    In this example, the role SP_SELF_APPROVAL is assigned to SARAHMANDY.



User Profiles page

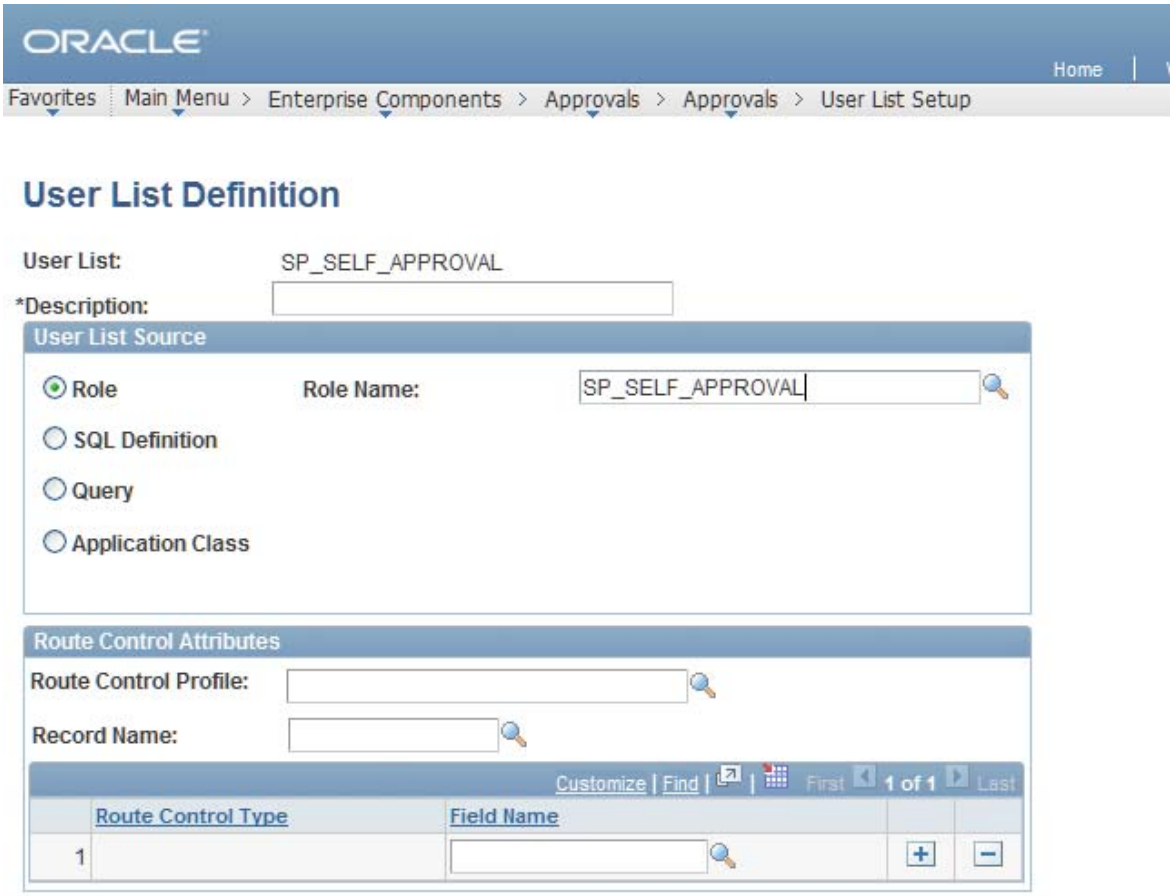
12. Repeat steps 6 through 11 to assign the new role to each of the providers listed in the results of query UPG_SPZ01.

Creating a User List

To create a user list for the self-approval role.

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab.
3. Enter a user list name and click Add.
4. Enter a description for the user list.
5. Ensure that the user list source *Role* is selected.
6. Select the name of the self-approval role that you created.

   In this example, a user list is created for the role SP_SELF_APPROVAL.



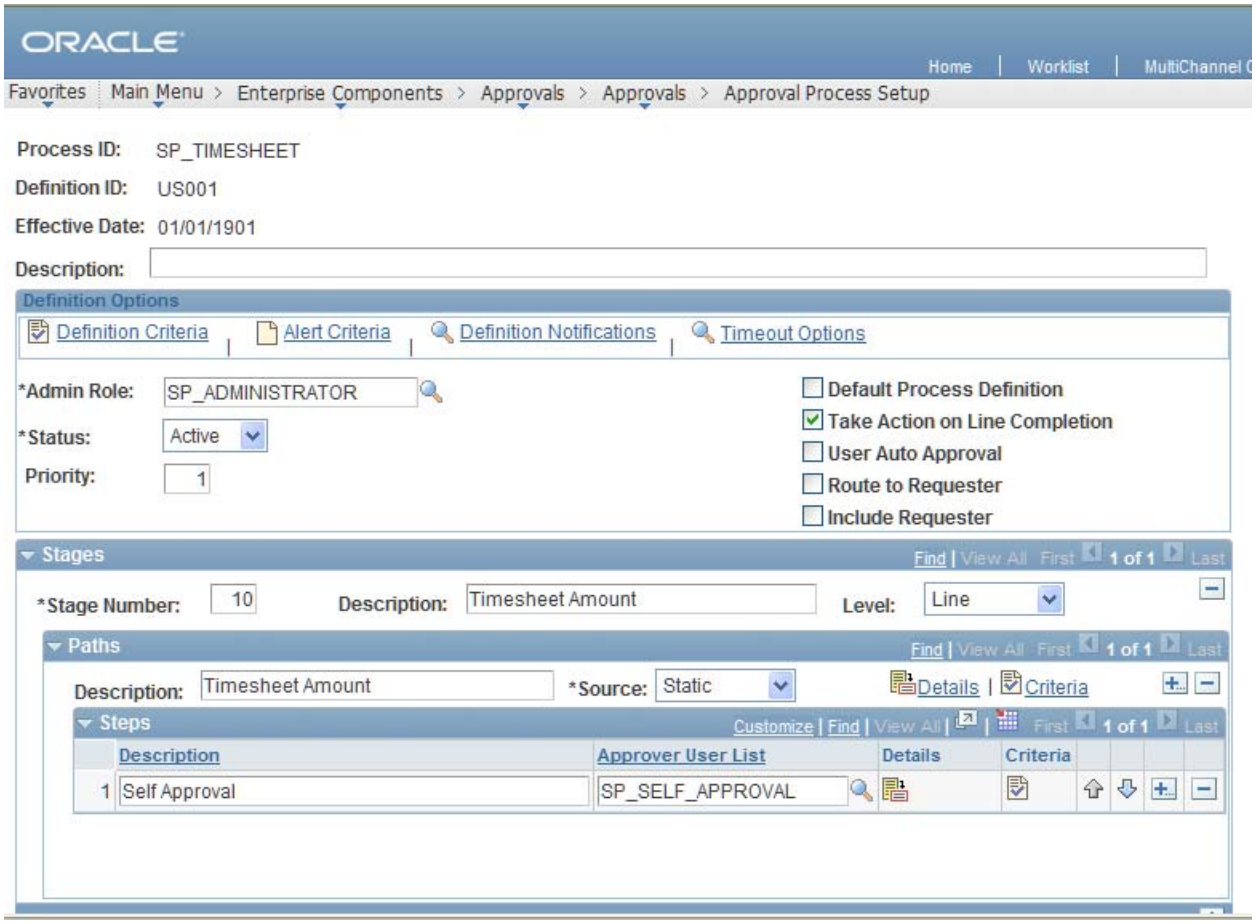
User List Definition page

7. Click Save.

Creating an Approval Process Definition and Assigning the User List

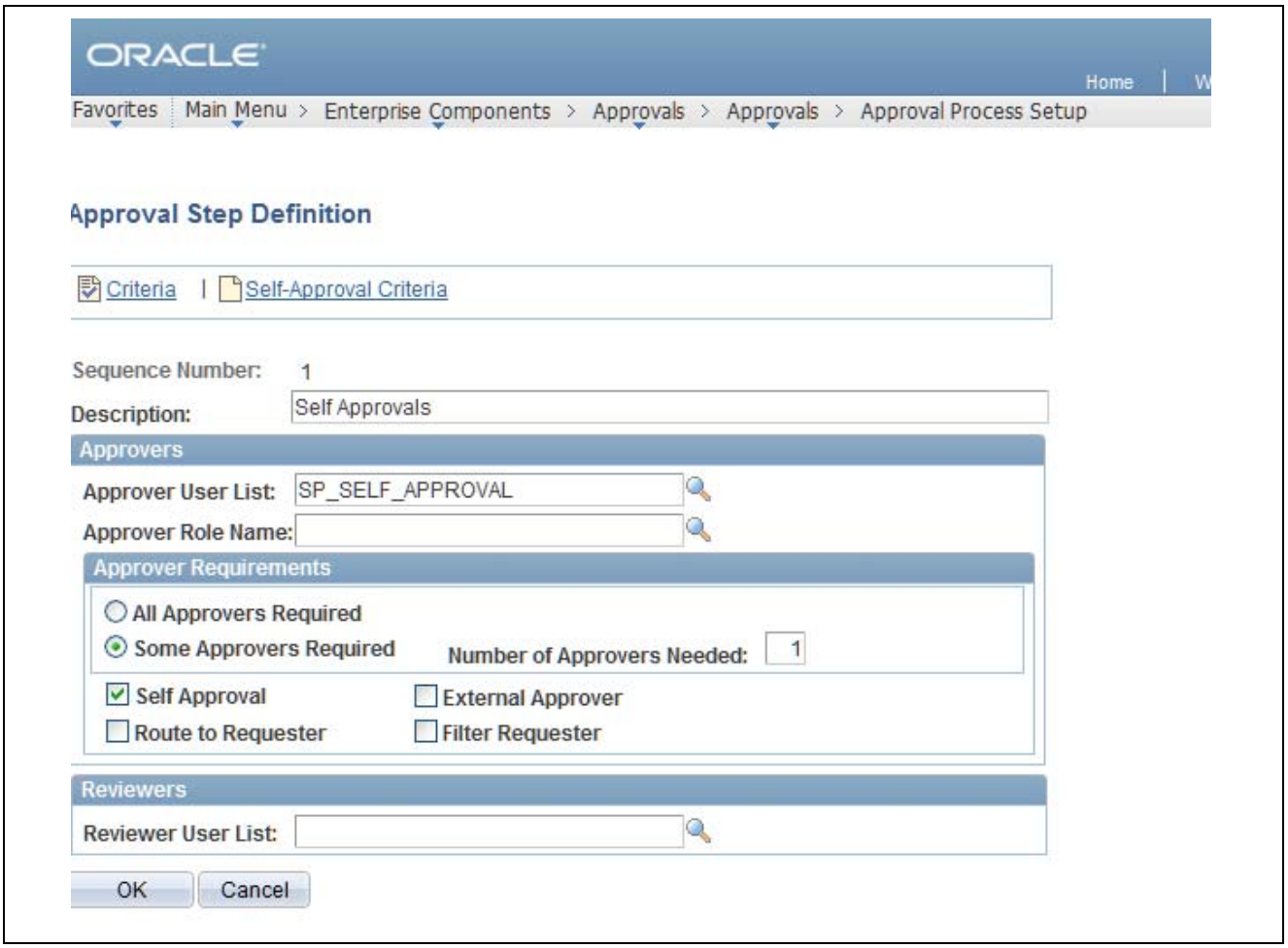
To create an approval process definition and assign the user list:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Definition.
2. Select the Find an Existing Value tab.
3. In the Process ID field, enter *SP_TIMESHEET* and click Search.
4. Select an appropriate value for the definition ID.



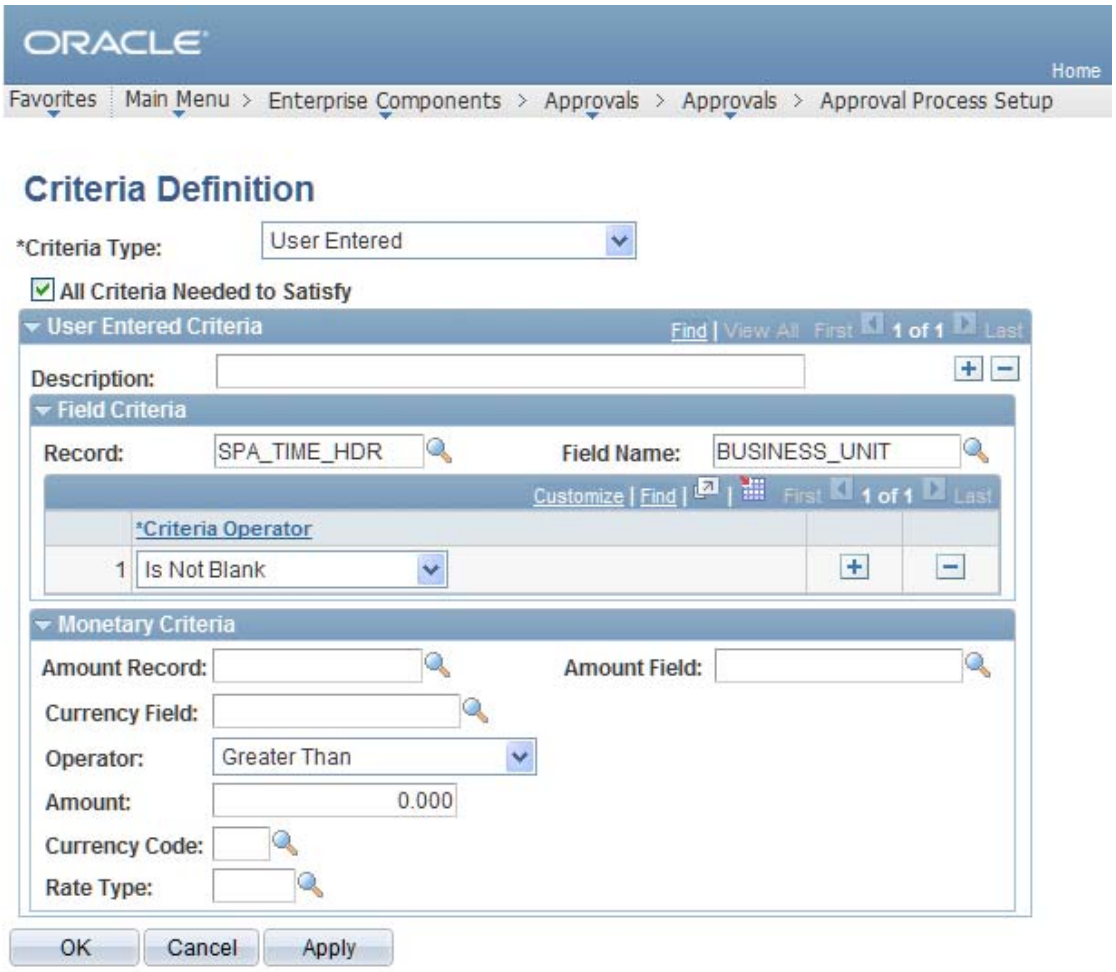
Approval Process Definition page

5. In the Steps section, click the Add (+) button to add a new step.
6. Enter a description for the step.
7. In the Approver User List field, select the new user list that you created for the self-approval role.
8. Click Save.
9. On the Approval Process Definition page, select the step to which the new self-approval user list is assigned and click the Criteria icon.
10. On the Approval Step Definition page, ensure that Self Approval is selected and that the Number of Approvers Needed field value is set to *1*.



Approval Step Definition page

11. On the Approval Process Definition page, select the step to which the self-approval user list is assigned and click the Details icon.
12. Click the Self-Approval Criteria icon.
13. On the Criteria Definition page, set up any criteria under Field Criteria or Monetary Criteria, as required



Criteria Definition page

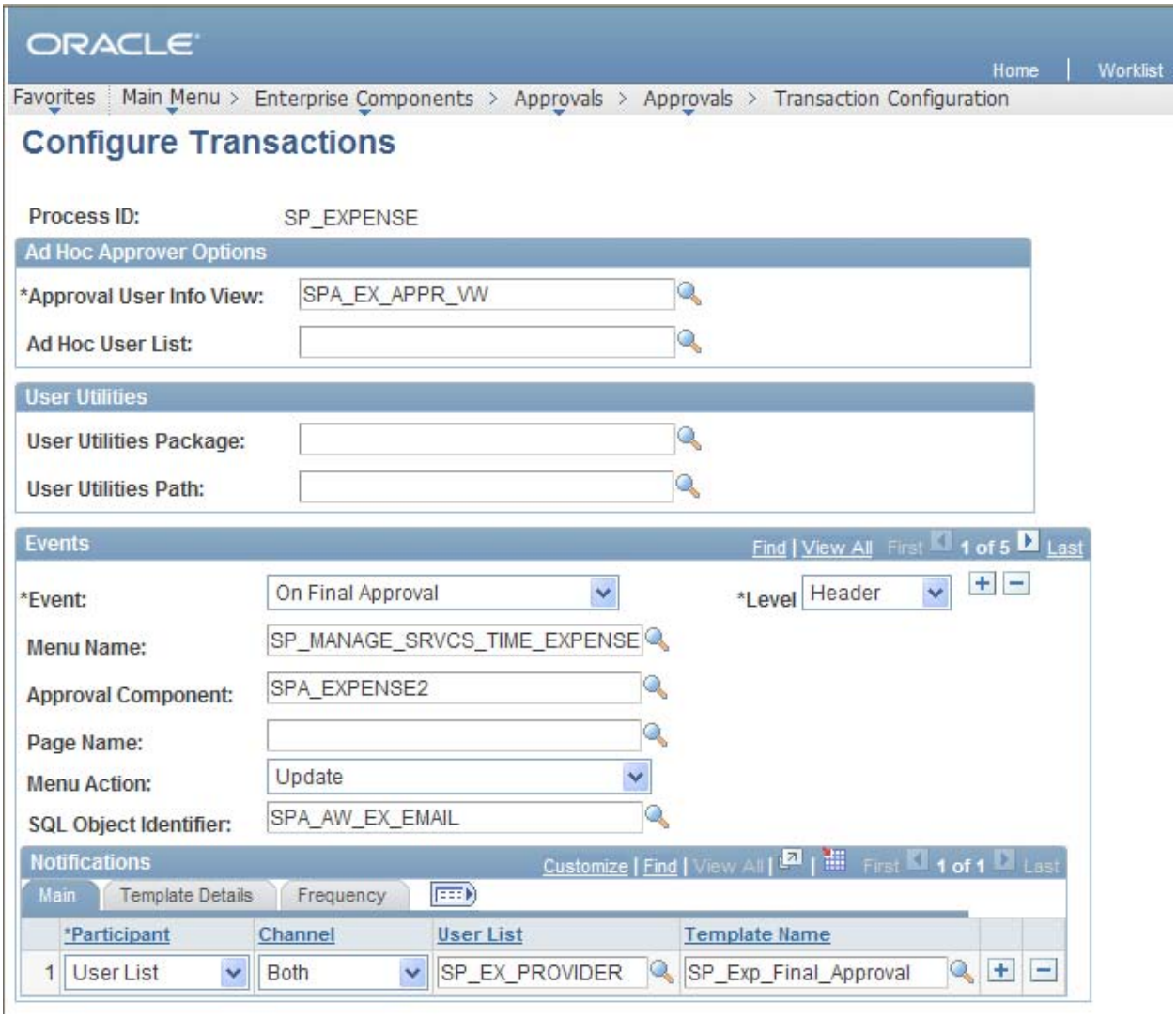
Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-6: Verifying User Lists for Expenses Approval

In this step you verify user lists for Expenses approval.

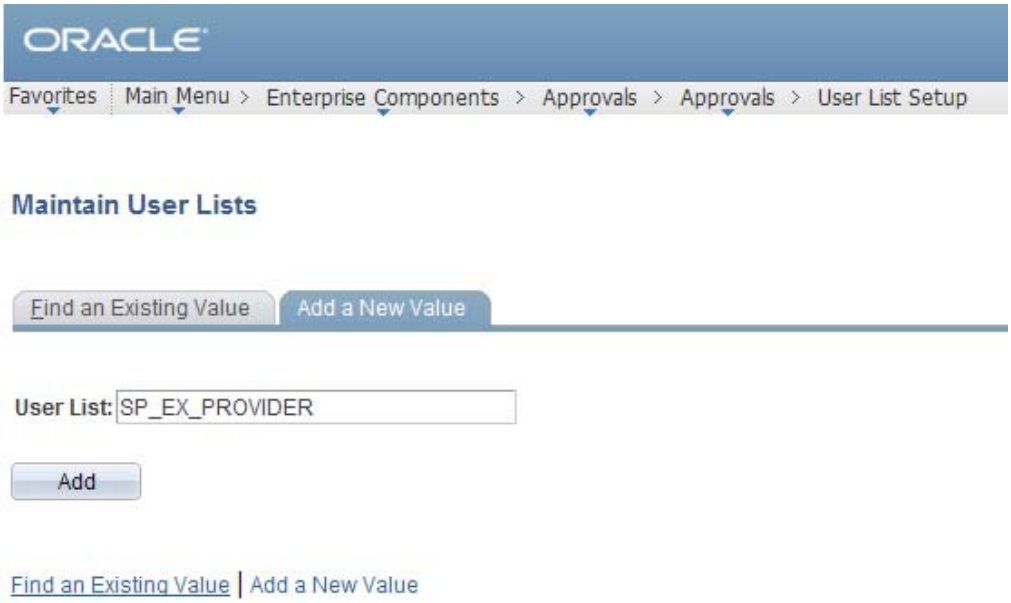
1. Select Enterprise Components, Approvals, Approvals, Transaction Configuration.
2. Edit the configuration for process ID SP_EXPENSE.
3. Note the names of the user lists in the Notifications section of the Configure Transactions page, as shown.



Configure Transactions page: SP_EXPENSE process

4. Select Enterprise Components, Approvals, Approvals, User List Setup.
5. On the Maintain User Lists page, make sure that all of the user lists in the configuration for SP_EXPENSE have been defined.

   If not, use the existing user lists in the transaction configuration or add the user lists.



Maintain User Lists page

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-7: Defining the Expenses Approval Process

This section discusses:

- Understanding Expenses Approval Process Setup
- Setting Up a User List
- Creating an Expenses Approval Process Definition
- Defining the EMP_SERVLET URL

Understanding Expenses Approval Process Setup

In this step, you add an Expenses approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ03 to determine the setIDs for which new Expenses approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the applicable steps below if you are updating an existing approval process definition.

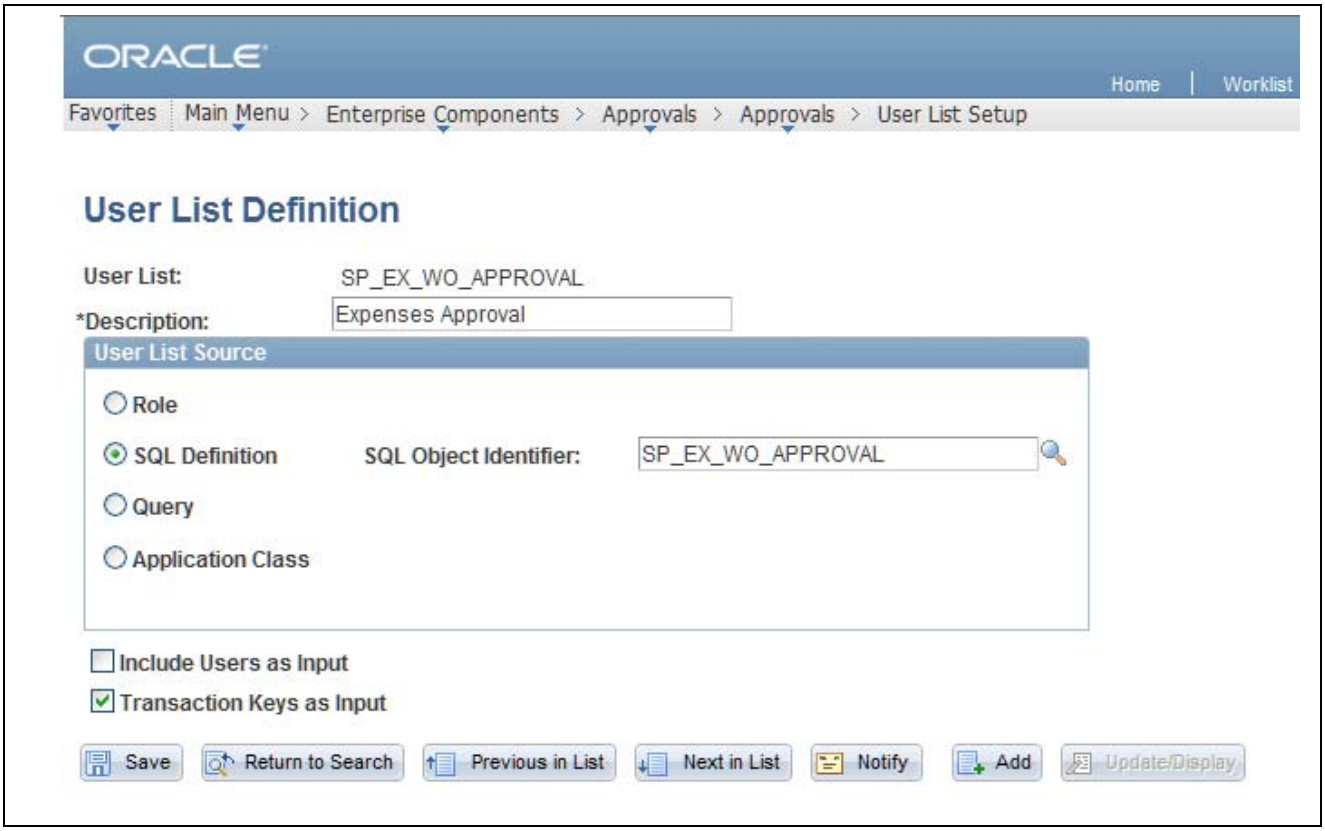
Setting Up a User List

To set up a user list:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

   In the example below, the user list SP_EX_WO_APPROVAL is used for the expense sheet approval process definition.



User List Definition page

Creating an Expenses Approval Process Definition

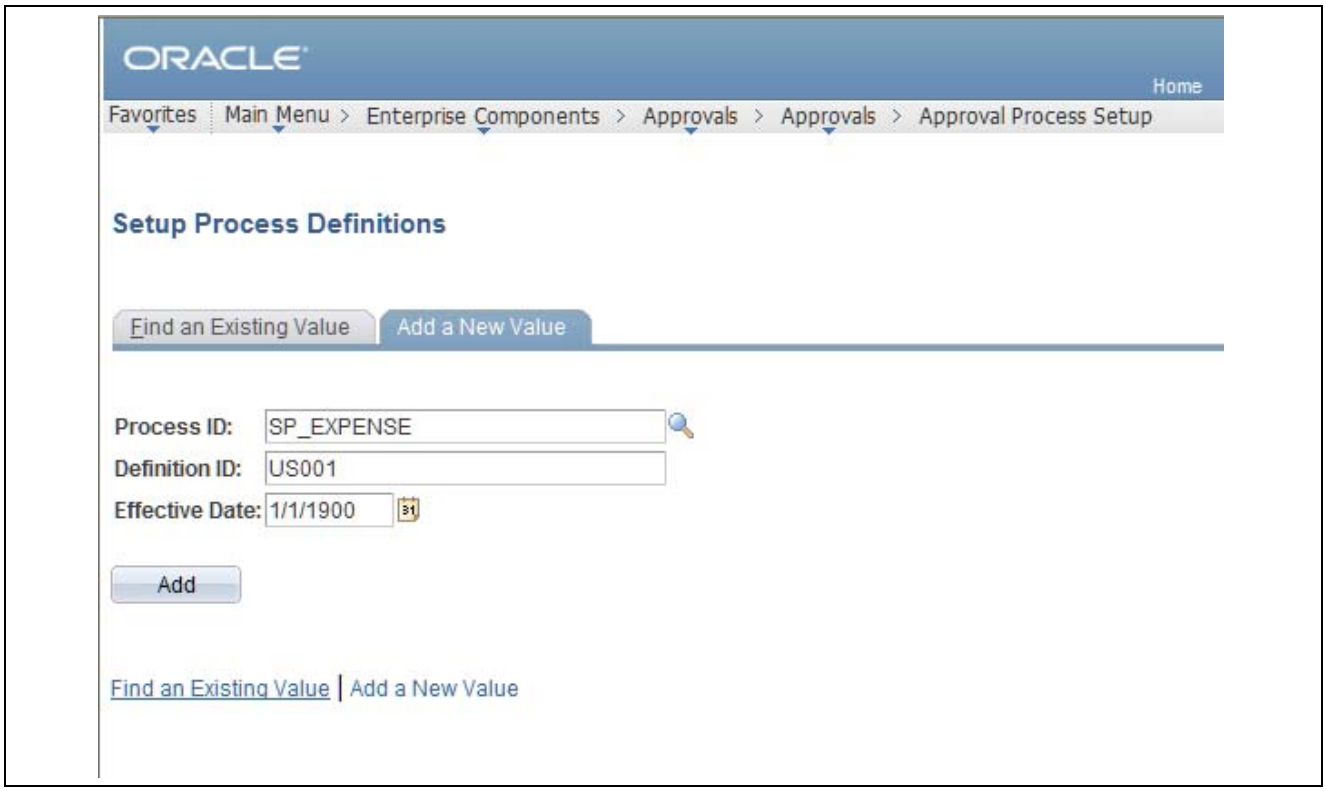
You will need to create an approval process definition for each definition ID. Refer to the results from query UPG_SPZ03 for the list of definition IDs for which you should create a process definition.

To create an approval process definition:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_EXPENSE*.
4. In the Definition ID field, enter the Set ID for which the definition is being created.

5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_EXPENSE*, the definition ID *US001*, and the effective date. Then click Add.

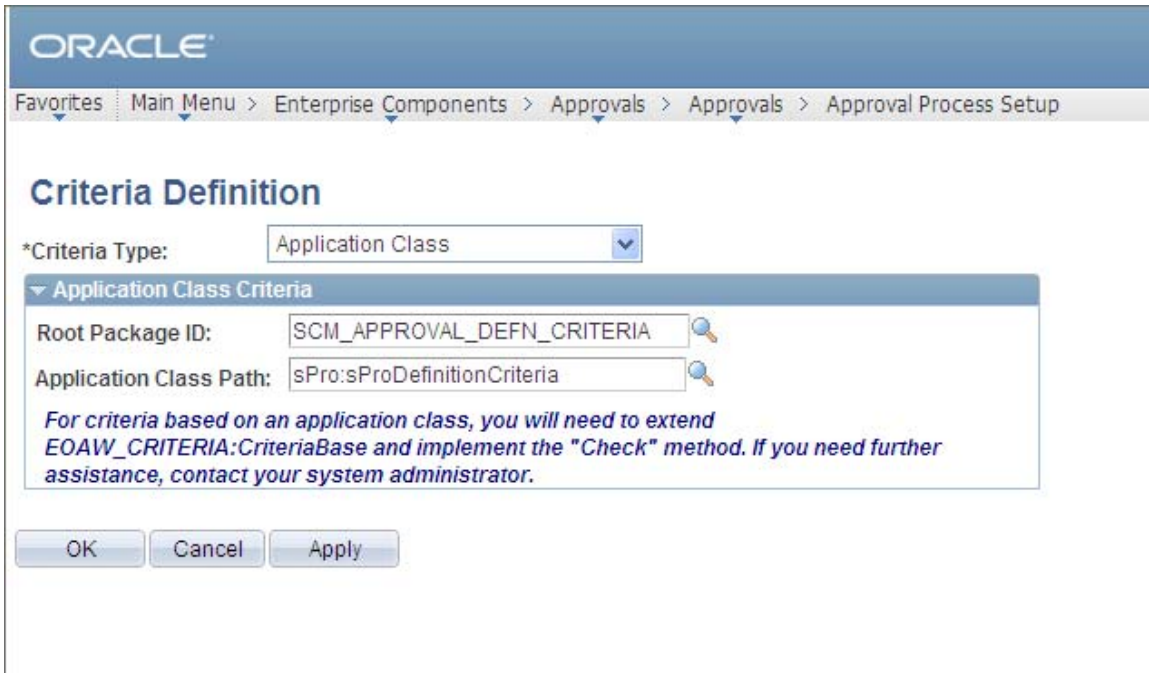


Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definition page, click the Definition Criteria link.

   The Criteria Definition page appears.

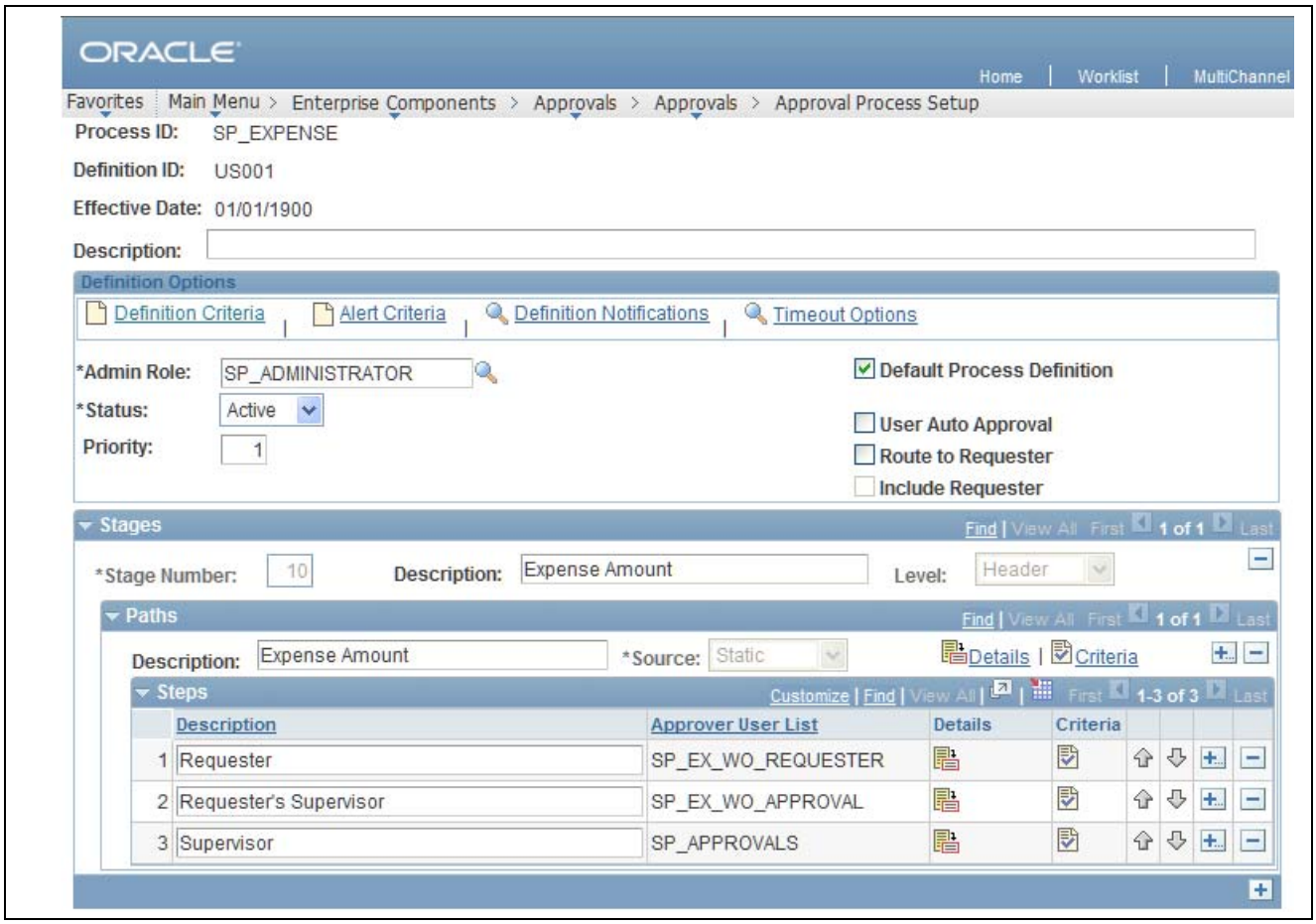
7. For the Root Package ID field, select *SCM_APPROVAL_DEFN_CRITERIA*.
8. For the Application Class Path field, select *sPro:sProDefinitionCriteria*.



Criteria Definition page: Application Class Criteria

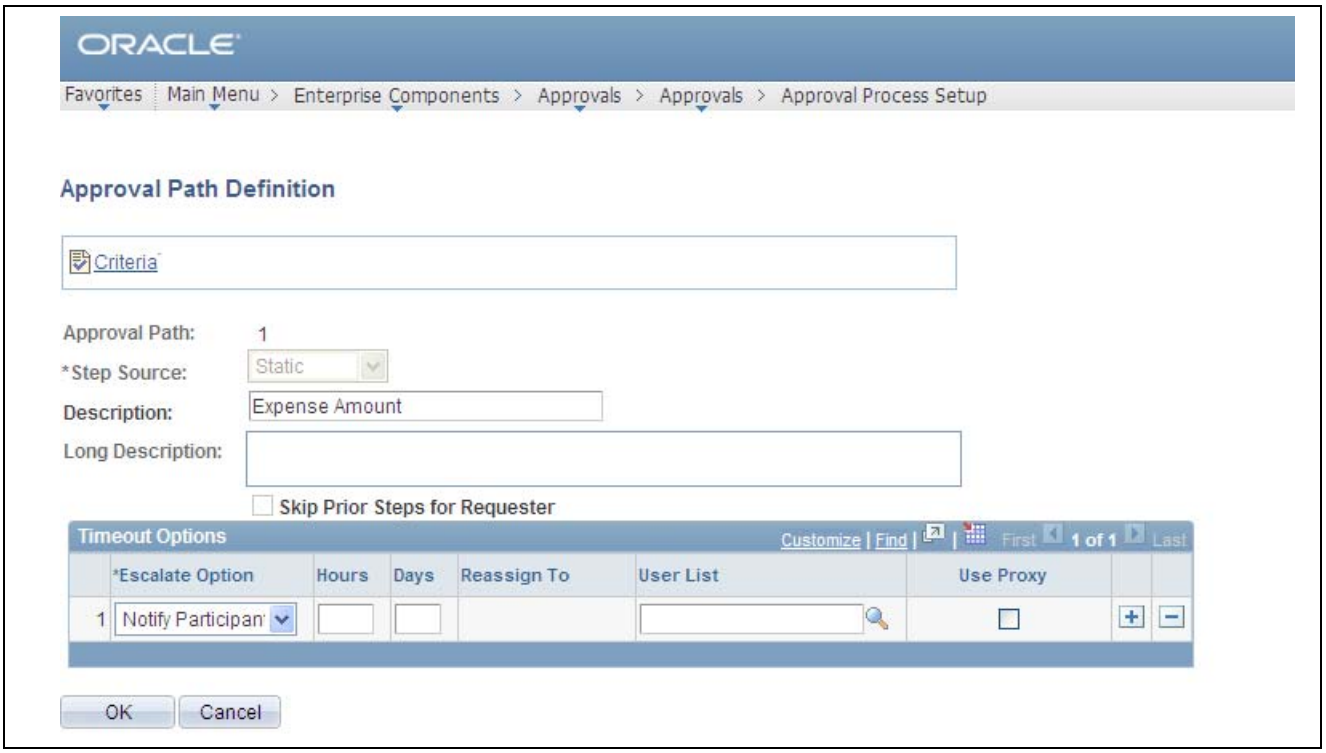
9. Click OK.
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    For example, this process definition has a Line stage and 3 steps defined.



Setup Process Definitions page: Stages and Paths

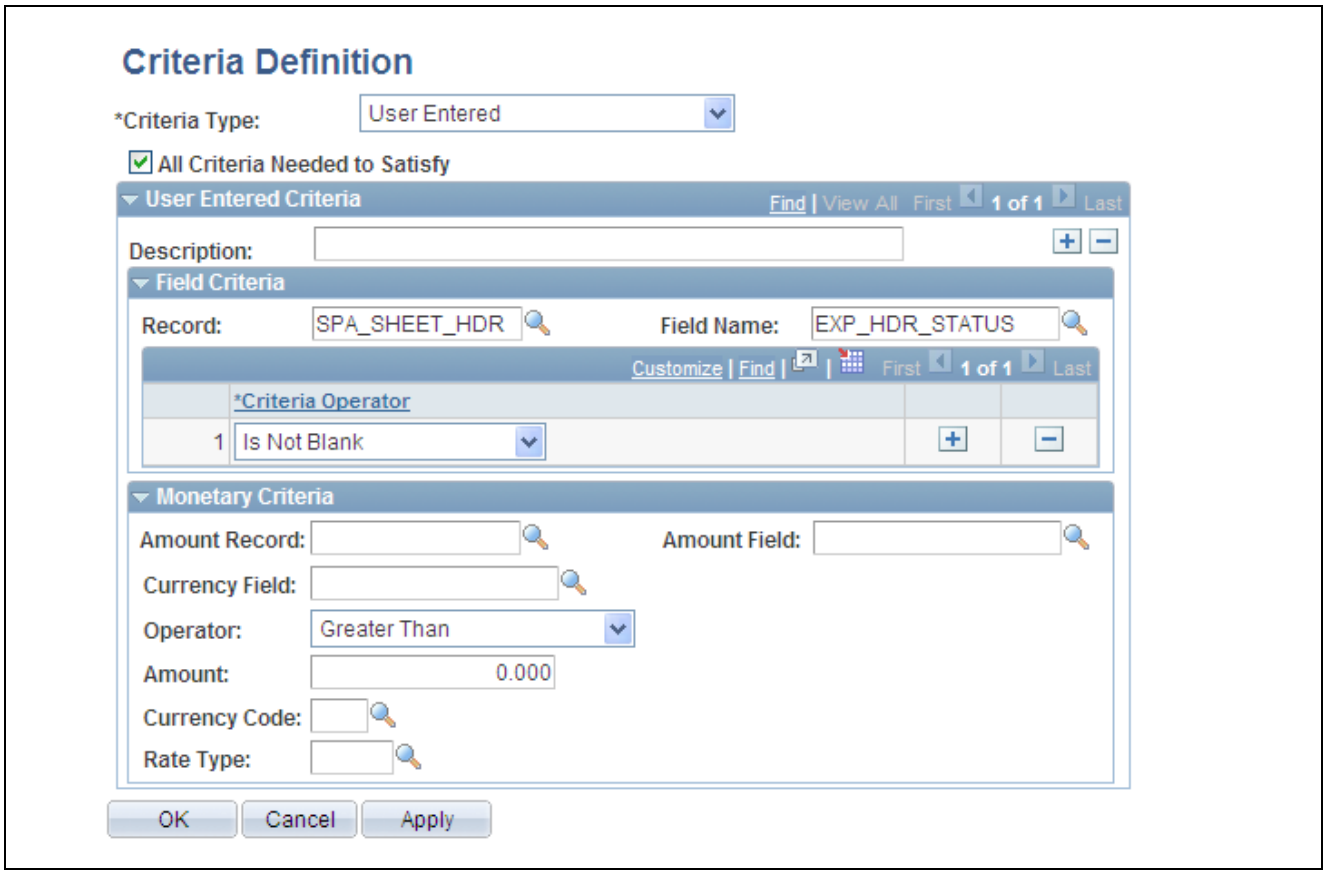
11. For each stage, enter a description and select a level of *Header* or *Line*.
12. For each path, enter a description and select the source as *Static* or *Dynamic*.
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.
14. Click the Details icon for each path and set up the path details on the Approval Path Definition page, as required.



Approval Path Definition page

15. Click the Criteria icon for each path and set up the path criteria on the Criteria Definition page, as required.

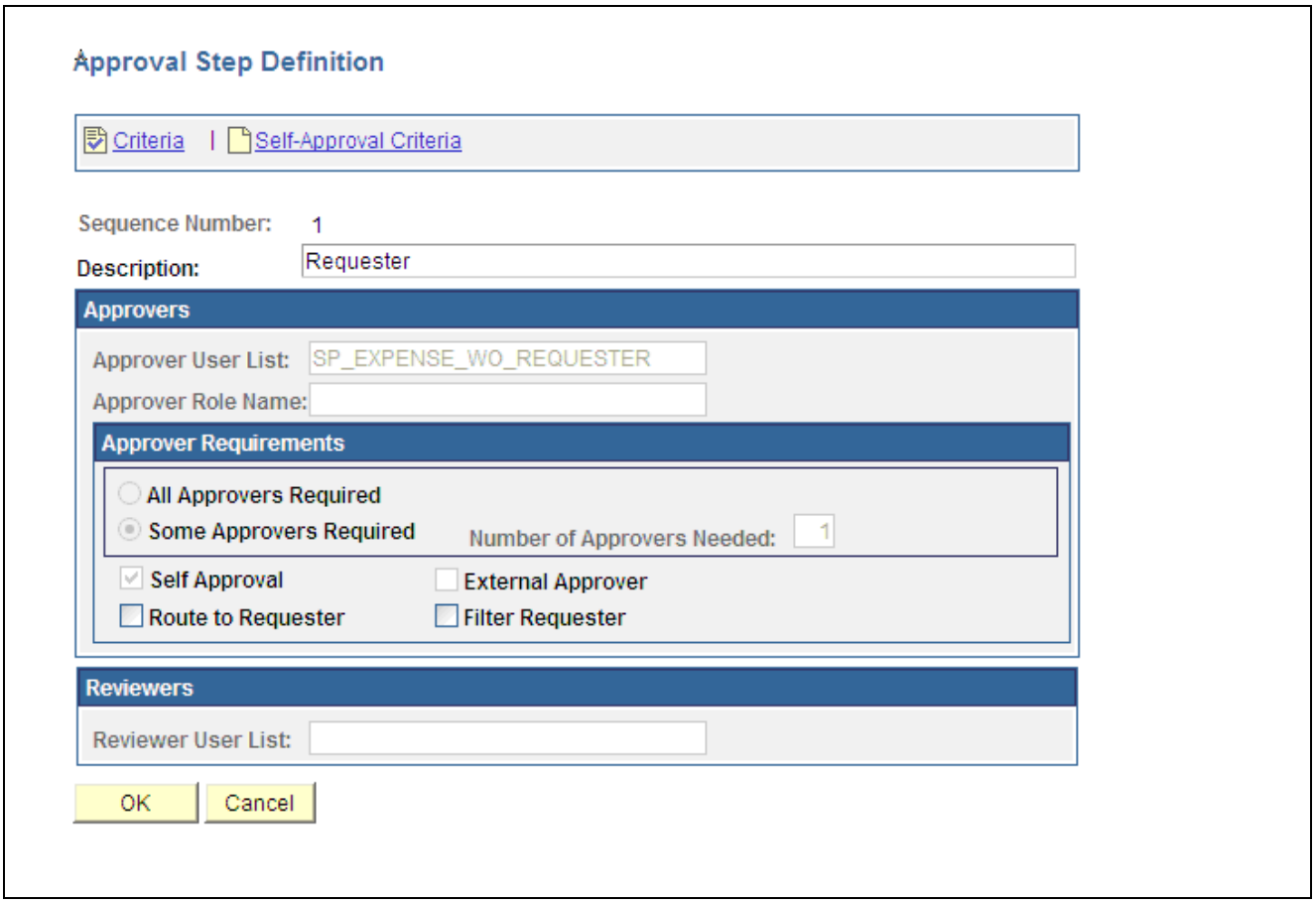
    For example, this path criteria definition has the field criteria defined with the record set to *SPA_SHEET_HDR*, the field name set to *EXP_HDR_STATUS*, and the criteria operator set to *Is Not Blank*.



Criteria Definition page: Field Criteria

16. Click the Details icon for each step and set up step details, as required.
17. Click the Self-Approval Criteria link to set up self-approval criteria.

    You can define field criteria or monetary criteria.

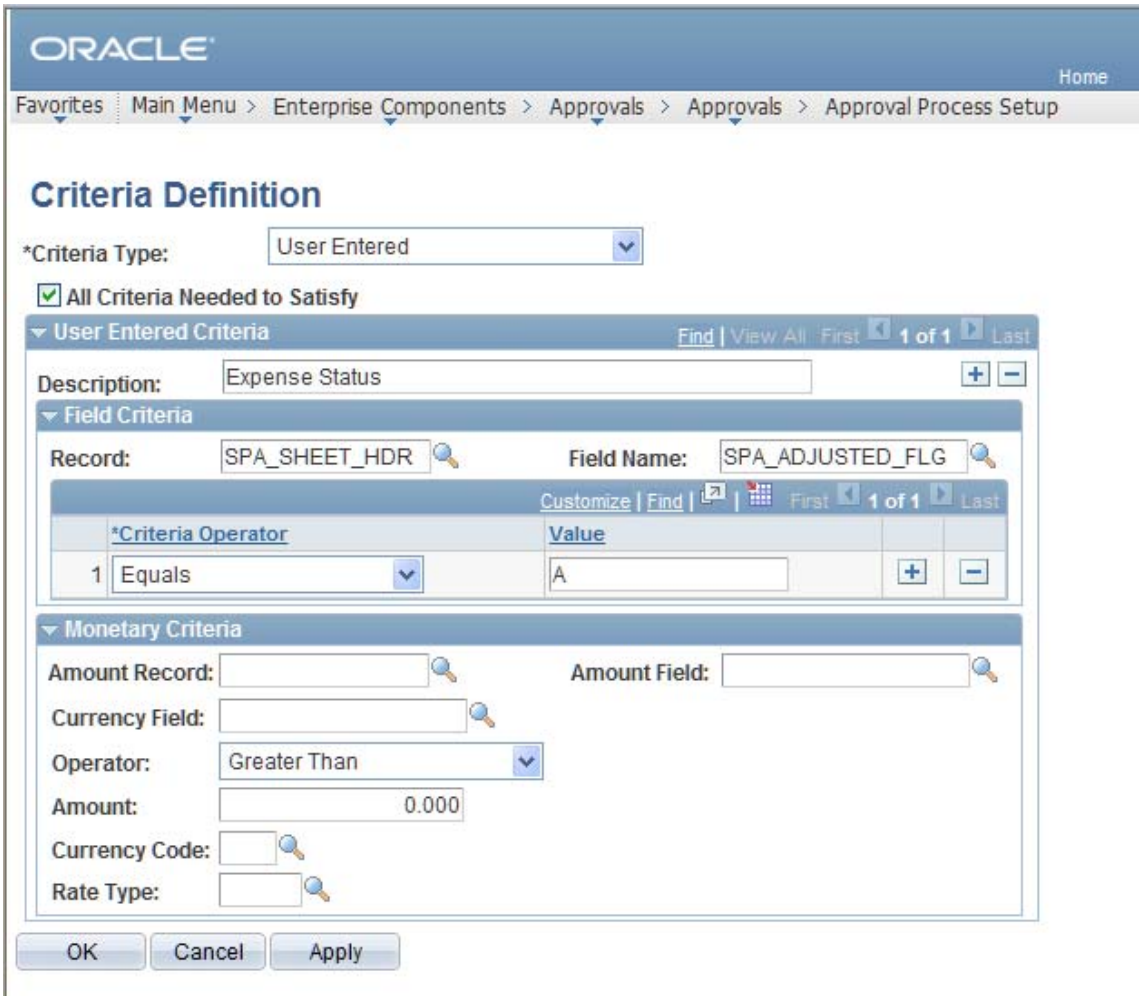


Approval Step Definition page

18. Click the Criteria icon for each step and set up step criteria on the Criteria Definition page, as required.

    You can define field criteria or monetary criteria.

    In this example, for approvals after adjustments to work, the following field criteria should be set up. Set the record to *SPA_SHEET_HDR*, the field name to *SPA_ADJUSTED_FLG*, the criteria operator to *Equals*, and the value to *A*.



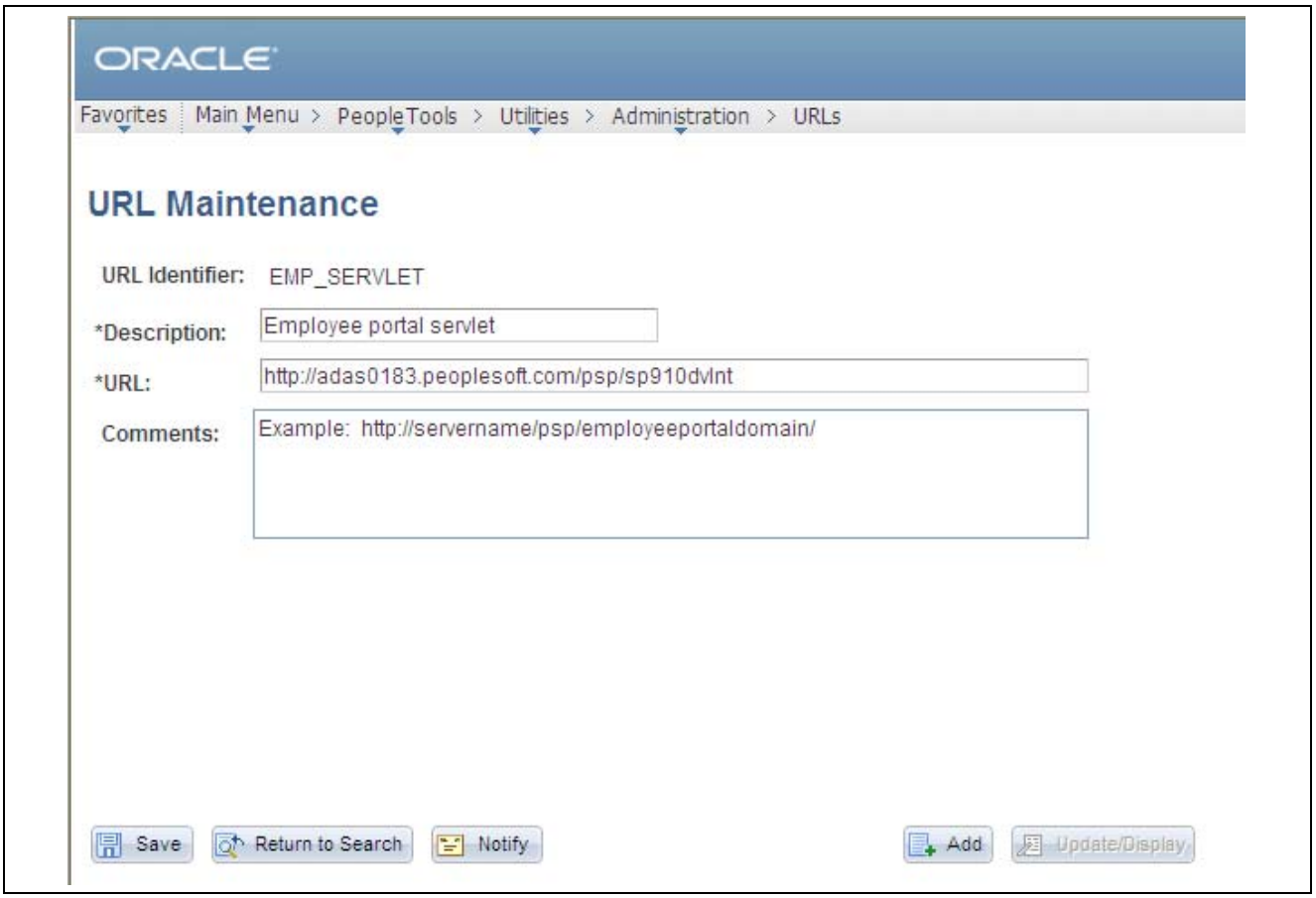
Criteria Definition: Expense Status

19. Repeat steps 1 through 18 for each approval process definition that you need to create.

Defining the EMP_SERVLET URL

To define the EMP_SERVLET URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.
3. To define the EMP_SERVLET URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.

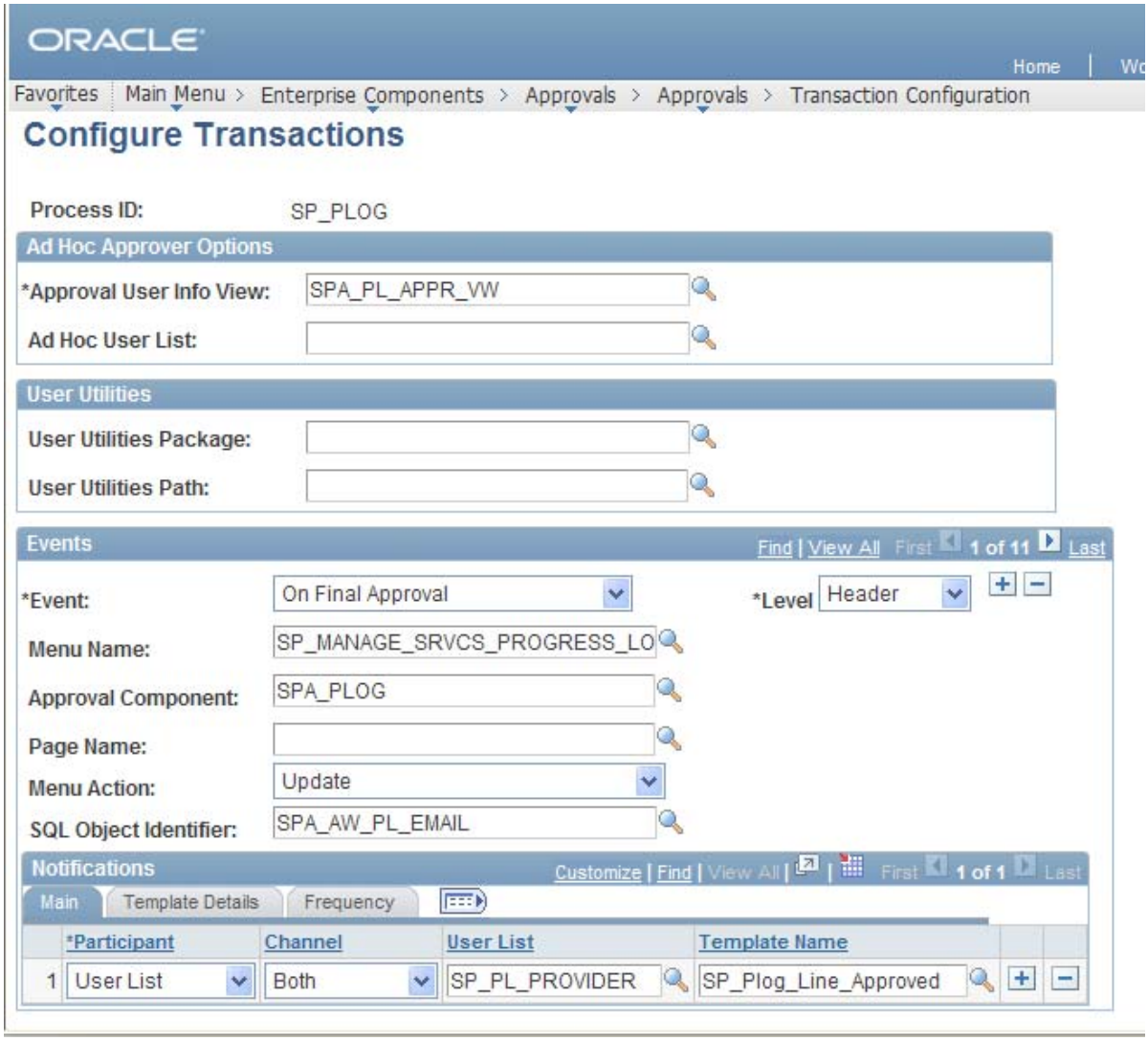
Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-8: Verifying User Lists for Progress Log Approval

In this task you will verify user lists for progress log approval.

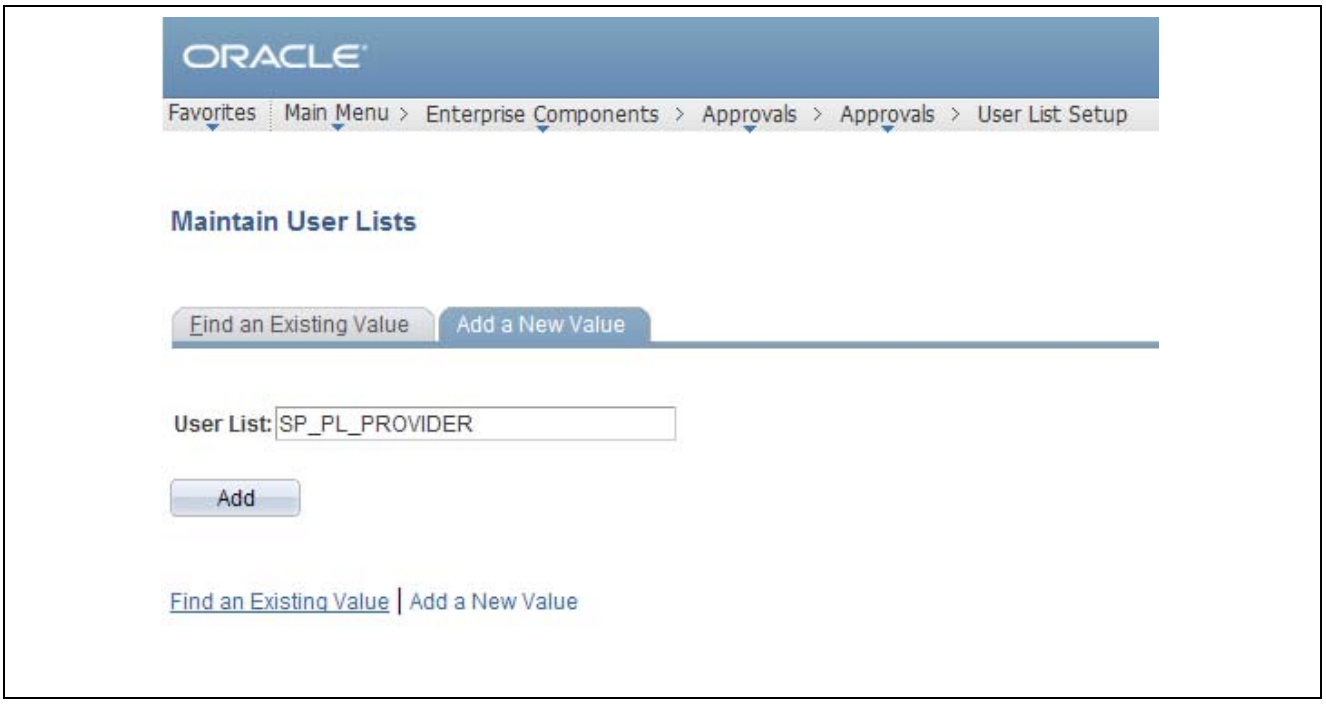
1. Select Enterprise Components, Approvals, Approvals, Transaction Configuration.
2. Edit the configuration for process ID SP_PLOG.
3. Note the names of the user lists in the Notifications section of the Configure Transactions page.



Configure Transactions page: SP_PLOG process

4. Select Enterprise Components, Approvals, Approvals, User List Setup.
5. On the Maintain User Lists page, make sure that all of the user lists used in the configuration for SPA_PLOG have been defined.

   If not, use the existing user lists in the transaction configuration or add the user lists.



Maintain User LIsts page: SP_PL_PROVIDER

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-9: Defining the Progress Log Approval Process

This section discusses:

- Understanding Progress Log Approval Process Setup
- Setting Up a User List
- Creating a Progress Log Approval Process Definition
- Defining the EMP_SERVLET URL

Understanding Progress Log Approval Process Setup

In this step, you add a progress log approval process definition and associate it with the approval user list that you previously created in your prior PeopleSoft FSCM release. Evaluate the results from query UPG_SPZ02 to determine the setIDs for which new progress log approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process.

Do not create new approval process definitions for those setIDs that already have one. Instead, follow the appropriate steps below if you are updating an existing approval process definition.

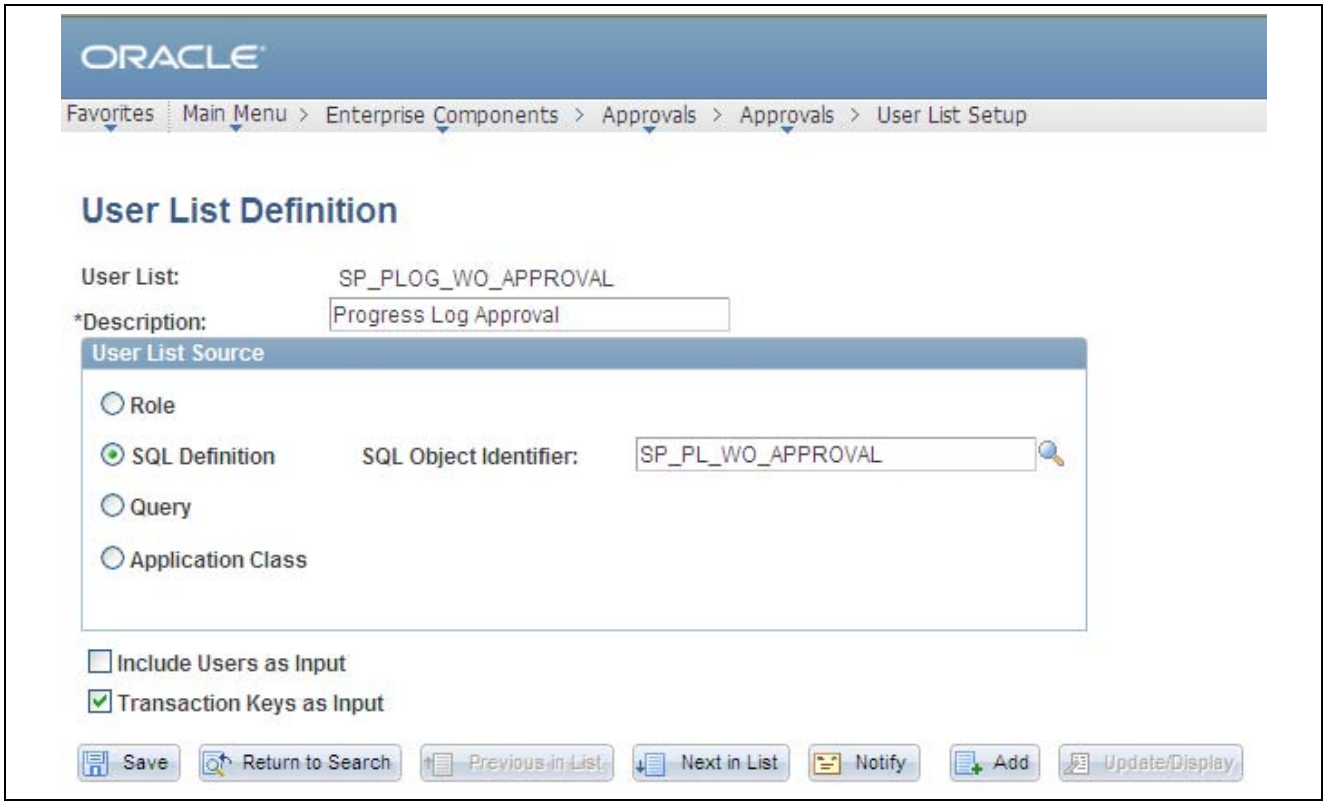
Setting Up a User List

To set up a user list:

1. Select Enterprise Components, Approvals, Approvals, User List Setup.
2. Select the Add a New Value tab, enter a new user list name and click Add.
3. On the User List Definition page, enter a description for the user list.
4. Select the appropriate user list source and click Add.

   A user list has four options for the user list source: Role, SQL Definition, Query, or Application Class.
5. Repeat steps 1 through 4 to create user lists for users to whom approvals will be routed.

   In the example below, the user list SP_PLOG_WO_APPROVAL is used for the progress log approval process definition.



User List Definition page

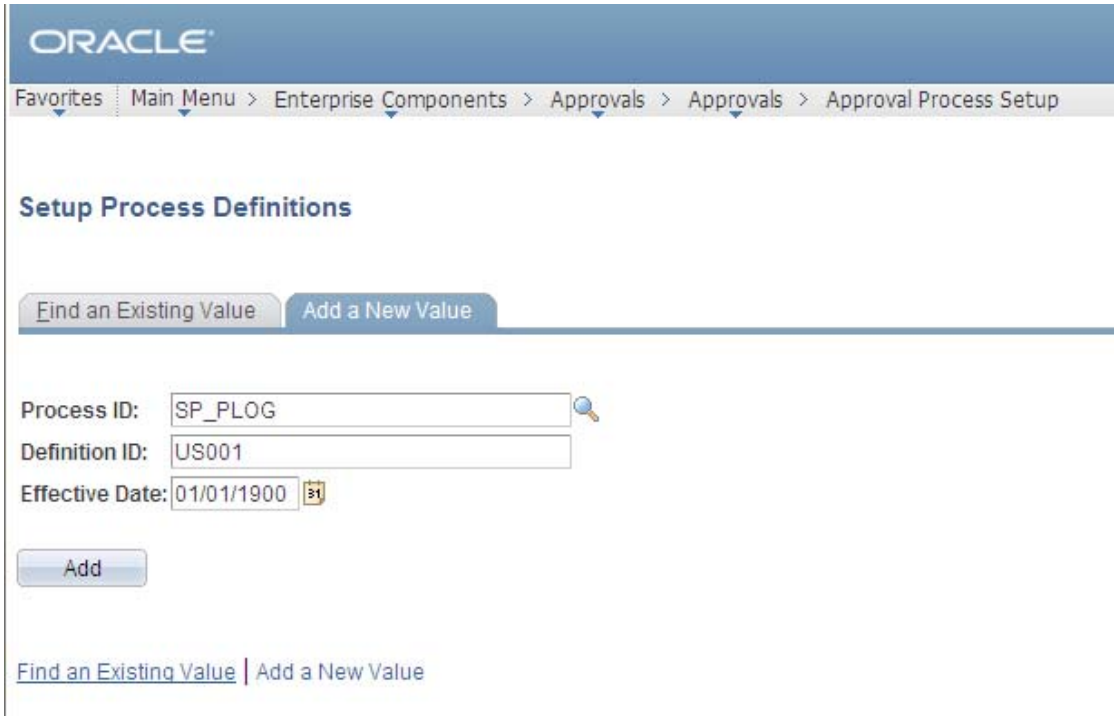
Creating a Progress Log Approval Process Definition

You will need to create an approval process definition for each definition ID. Refer to the results from query UPG_SPZ02 for the list of definition IDs for which you should create a process definition.

To create an approval process definition:

1. Select Enterprise Components, Approvals, Approvals, Approval Process Setup.
2. Select the Add a New Value tab to create a new approval process definition.
3. In the Process ID field, enter *SP_PLOG*.
4. In the Definition ID field, enter the Set ID for which the definition is being created.
5. Enter the effective date and click Add.

   For example, if you need to create an approval process definition for definition ID US001, select the process ID *SP_PLOG*, the definition ID *US001*, and the effective date. Then click Add.

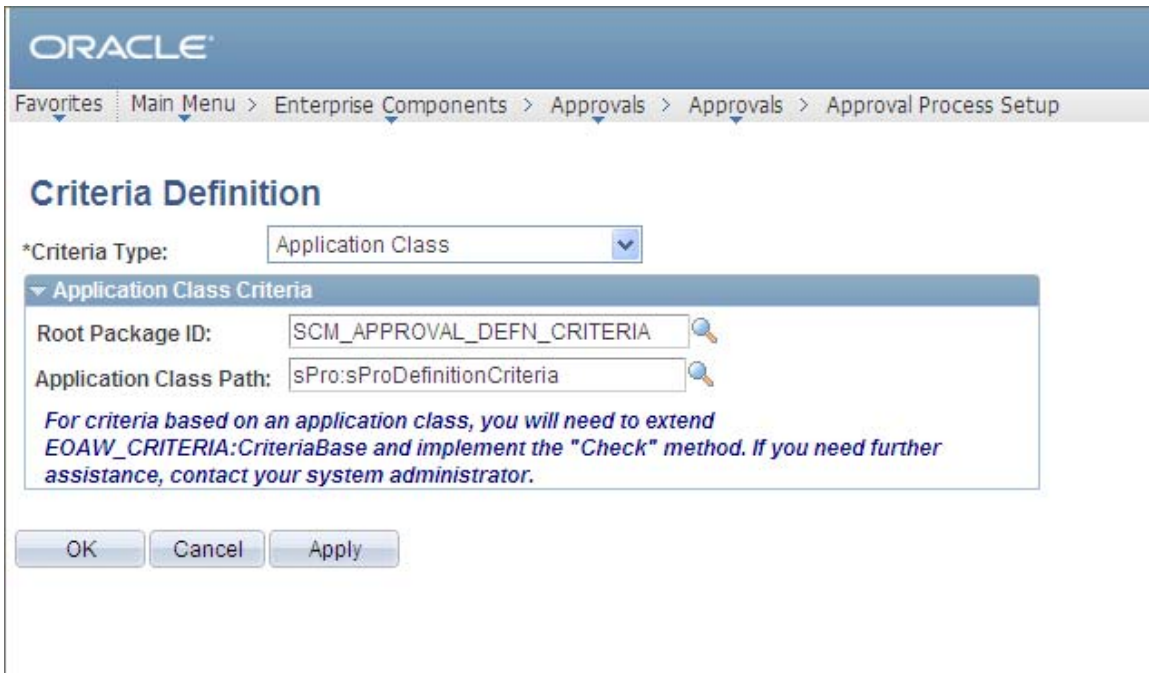


Setup Process Definitions page: Add a New Value tab

6. On the Setup Process Definition page, click the Definition Criteria link.

   The Criteria Definition page appears.

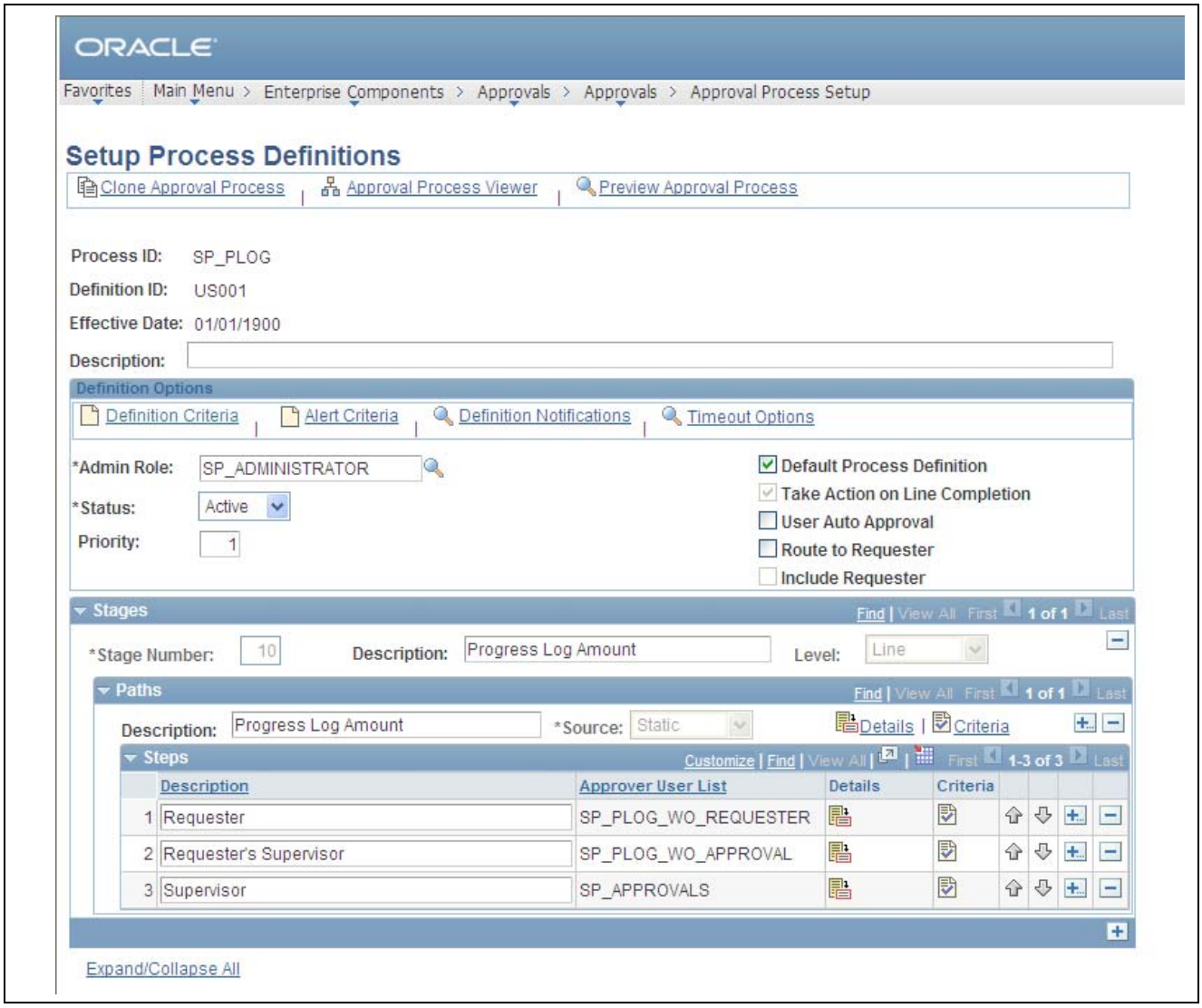
7. For the Root Package ID field, select SCM_APPROVAL_DEFN_CRITERIA.
8. For the Application Class Path field, select sPro:sProDefinitionCriteria.



Criteria Definition page: Application Class Criteria

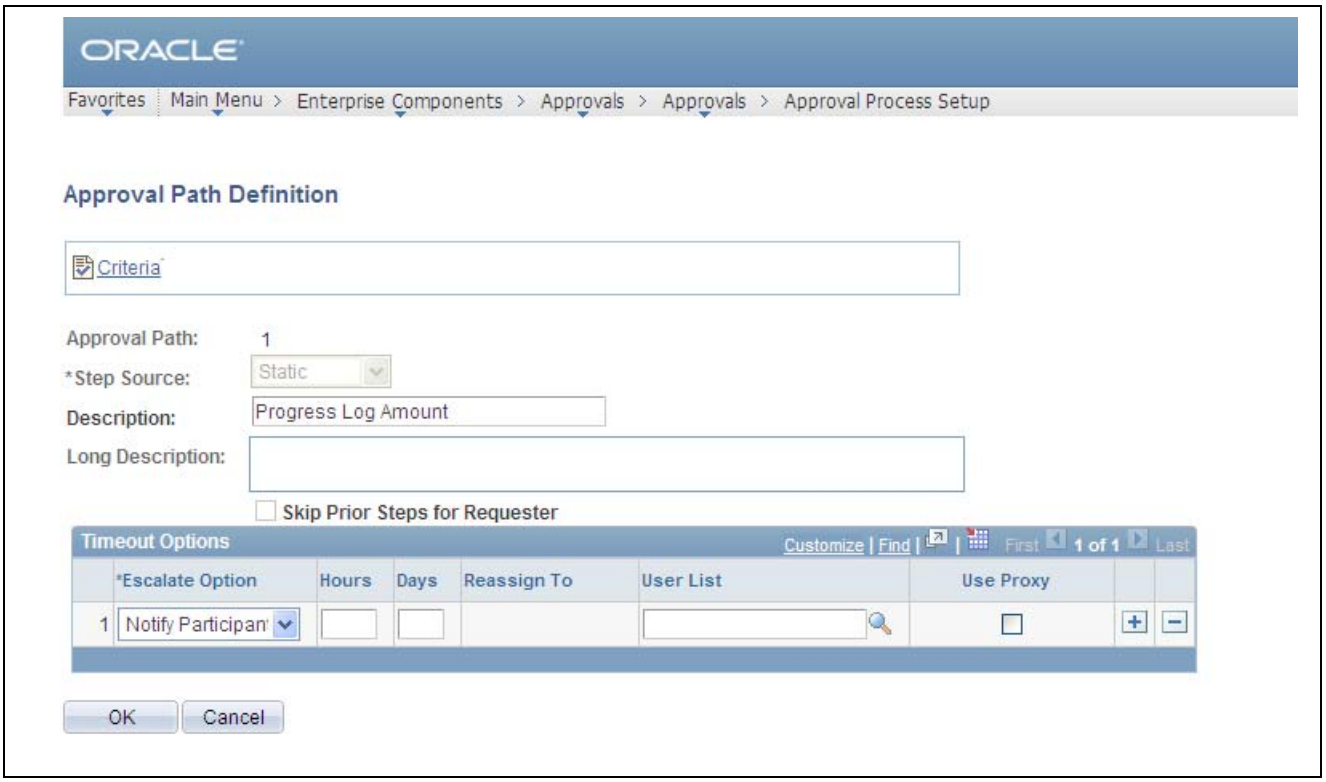
9. Click OK.
10. Go to the Setup Process Definitions page to set up stages and paths, as required.

    For example, this process definition has a Line stage and 3 steps defined.



Setup Process Definitions page: Stages and Paths

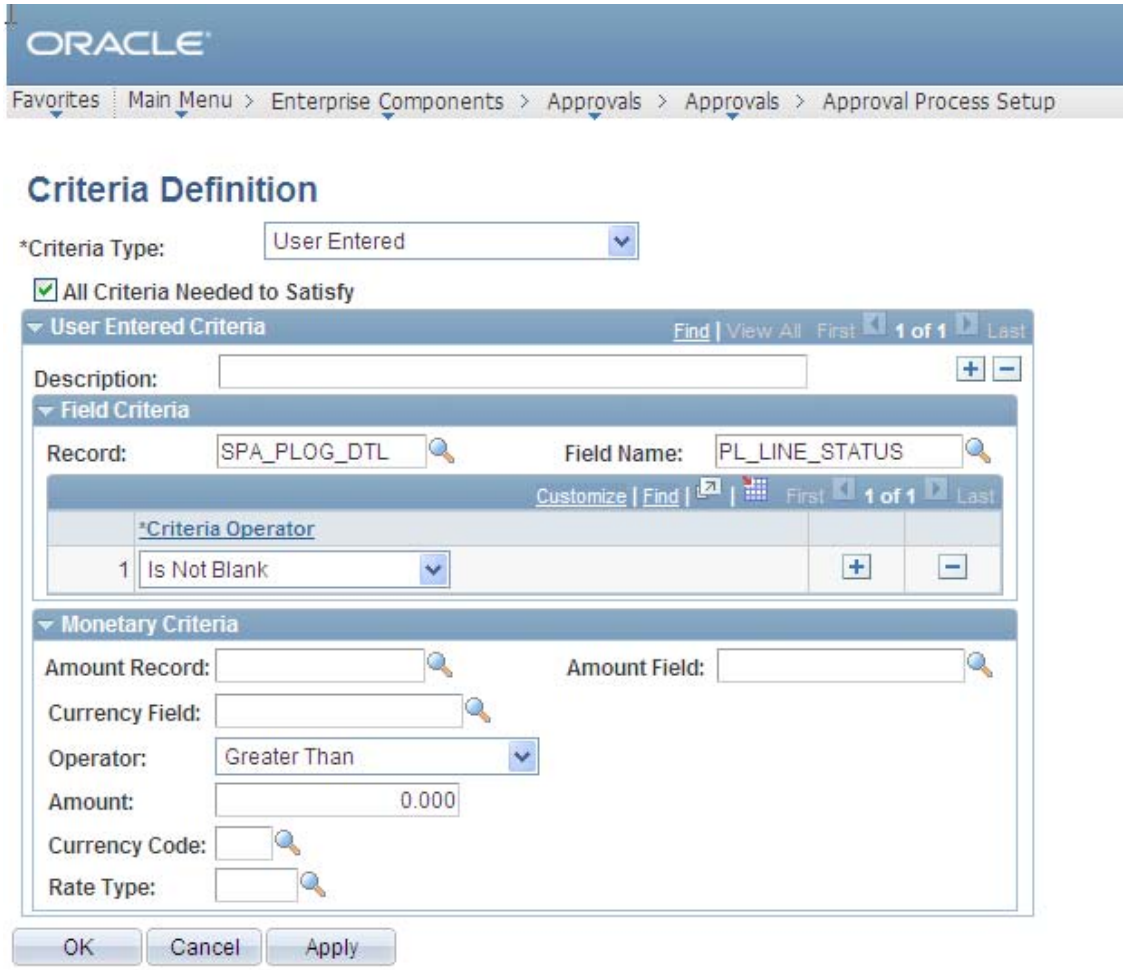
11. For each stage, enter a description and select a level of *Header* or *Line*.
12. For each path, enter a description and select the source as *Static* or *Dynamic*.
13. To add steps, click the Add (+) button in the Steps section, enter a description, and select the appropriate approver user list.
14. Click the Details icon for each path and set up the path details on the Approval Path Definition page, as required.



Approval Path Definition page

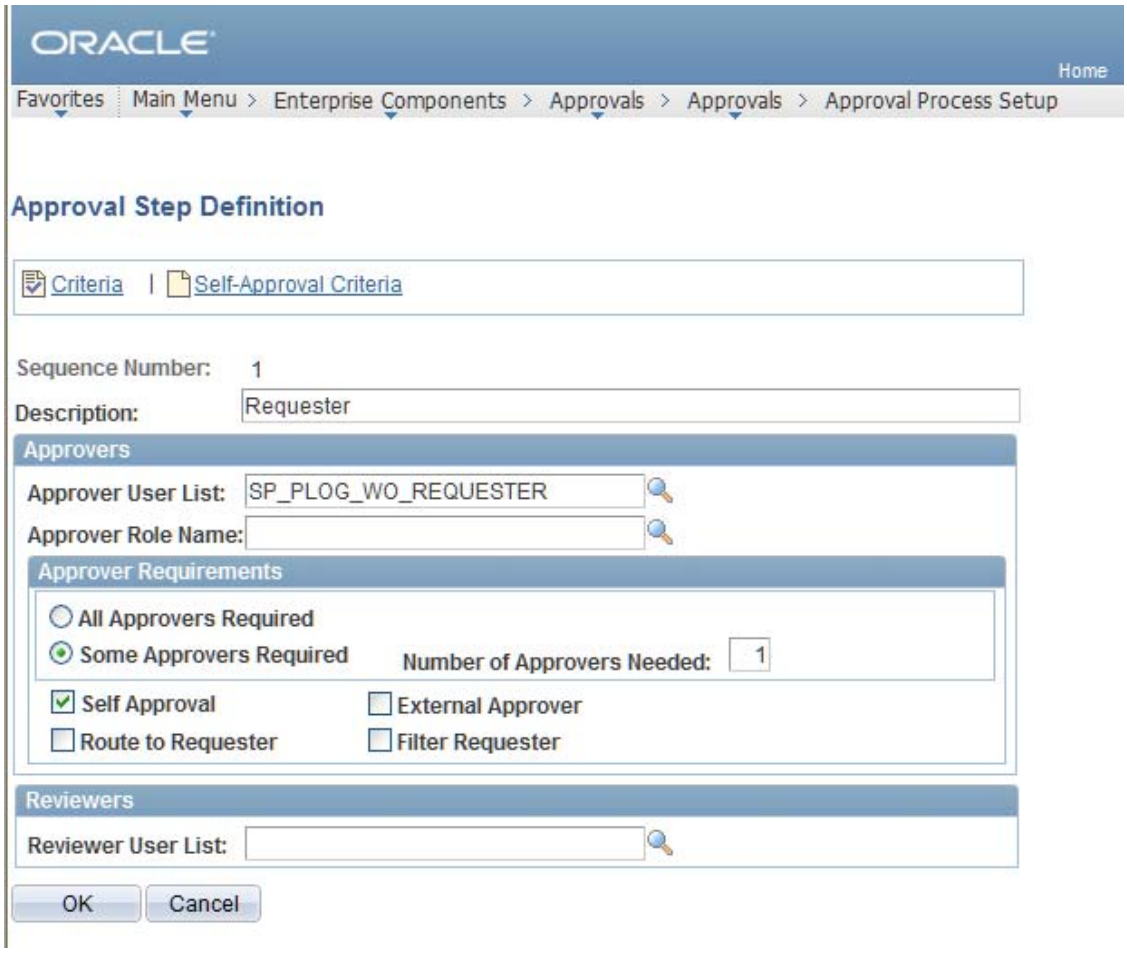
15. Click the Criteria icon for each path and set up the path criteria on the Criteria Definition page, as required.

    For example, this path criteria definition has the field criteria defined with the record set to *SPA_PLOG_DTL*, the field name set to *PL_LINE_STATUS*, and the criteria operator set to *Is Not Blank*.



Criteria Definition page: Field Criteria

16. Click the Details icon for each step and set up the step details, as required.
17. Click the Self-Approval Criteria link on the Approval Step Definition page to set up self-approval criteria. You can define field criteria or monetary criteria.

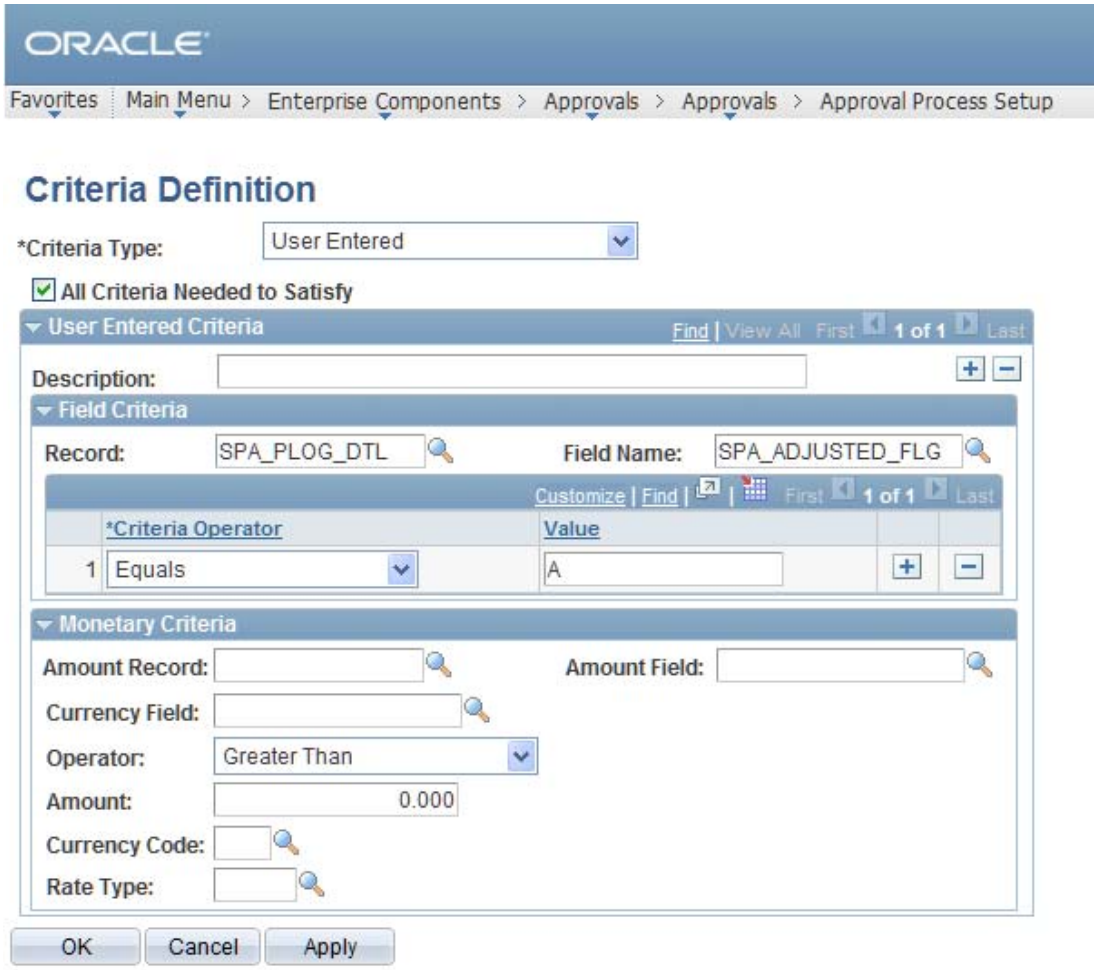


Approval Step Definition page

18. Click the Criteria icon for each step and set up the step criteria on the Criteria Definition page, as required.

    You can define field criteria or monetary criteria.

    In this example, for approvals after adjustments to work, the following field criteria should be set up. Set the record to *SPA_PLOG_DTL*, the field name to *SPA_ADJUSTED_FLG*, and the criteria operator to *Equals*.



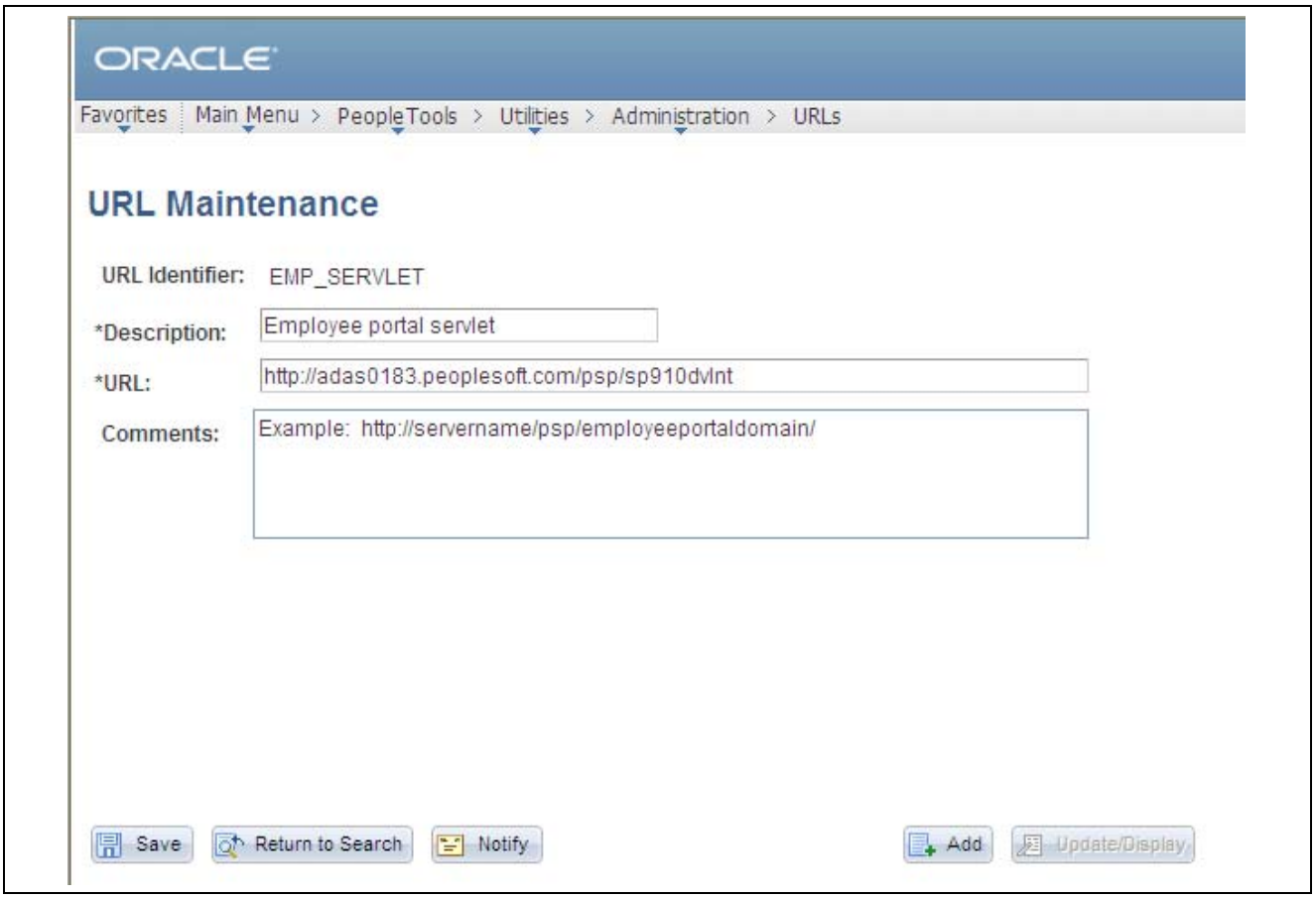
Criteria Definition page: Plog Status

19. Repeat steps 1 through 18 for each approval process definition that you need to set up.

Defining the EMP_SERVLET URL

To define the EMP_SERVLET URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the Add a New Value tab.
3. To define the EMP_SERVLET URL variable, in the URL Identifier field, enter *EMP_SERVLET* and click Add.



URL Maintenance page

4. Enter a description and the URL.
5. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-10: Activating HCM Integration in sPro

This task applies to customers who currently use or will use PeopleSoft Services Procurement with Oracle's PeopleSoft Human Capital Management (HCM) integration. If you are using PeopleSoft Services Procurement and do not plan to integrate with PeopleSoft HCM, you may skip this task.

PeopleSoft Services Procurement is now integrated with PeopleSoft HCM to use common employee and job information. If you are currently using PeopleSoft Services Procurement and PeopleSoft HCM *and* you want to take advantage of the sPro/HCM integration features after the upgrade is complete, you will need to review or update HCM-related fields on your existing requisitions and work orders as described in this step.

For existing requisitions, you have two options:

- Leave the HCM fields blank for existing requisitions. These can be overridden or filled when a work order is created or submitted. Even if you select the HCM Person Integration option on the Services Procurement Installation Options page after the upgrade, the requisition is not affected.
- Enter values in the HCM fields on existing requisitions through scripts. The PeopleSoft system is unable to provide scripts because many of the HCM fields are business unit-dependent and certain fields are regulated by region.

In addition, for existing work orders, if the PeopleSoft HCM integration is switched on after upgrade:

- You will be asked to enter values in the required HCM fields when submitting work orders if existing work orders are in open status and are not yet submitted.
- You will need to update the HCM fields on the SPF_WORDERREC_1 table through your own custom scripts if existing work orders have been submitted or approved. When a work order is released, the system checks to see if the HCM option is selected. If it is selected, then a message is published to PeopleSoft HCM when a work order is released. Because no HCM data exists, PeopleSoft HCM will return an error.
- Finally, you will also need to take action on work orders that have already been released because no corresponding person and job entries exist in PeopleSoft HCM for the service provider associated with the work order. These work orders can be reassigned, replaced or cancelled, or closed or terminated. PeopleSoft Services Procurement sends messages to PeopleSoft HCM when these actions occur. However, you will need to manually create the HCM person and job entries and then update the SPB_PERSON_TBL table, the SPF_WORDERREC_1 table (for resource-based work orders), or the SPF_WO_TRK_RSRC table (for deliverable-based work orders).

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-11: Defining a Default Business Unit

If you have previously defined a default business unit for your users, you may skip this step. A default business unit is used throughout PeopleSoft Services Procurement to derive setIDs for specific setup data or transactions. To select a service type while defining service requester or service coordinator defaults, a default business unit must first be defined in the user preferences. If you have not defined a default business unit for your users, you should do so.

To define a default business unit:

1. Select Services Procurement, Maintain Users, Maintain User Preferences.
2. Enter the user ID of the user whose preferences you want to modify and click Search.
3. Click the Overall Preference link.
4. Enter a default business unit.
5. Click Save.
6. Repeat these steps for each user.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-12: Defining Requester Defaults

A service requester may have some information that does not often vary when creating requisitions and work orders. Defining requester defaults will auto-populate the requester's most commonly used information on the work order and requisition at the time it is created. In this step, you define those defaults.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

To define requester defaults:

1. Select Services Procurement, Maintain Users, Service Requester Defaults.
2. Enter the requester's user ID of the user that you want to update in the Requester User ID field.
3. If a service is defined without an entry in the Service Type field, select the service type applicable for the service.
4. Select the May Enter Work Order and May Extend Work Order check boxes to allow the user to add new work orders.
5. Select the Authorized to Source to Preferred Suppliers check box if the user is authorized to do so.
6. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-13: Defining Service Coordinator Defaults

A service coordinator may have certain information that does not often vary when creating work orders. Defining service coordinator defaults will automatically enter the service coordinator's most commonly used information on the work order when it is created. In this step, you define those defaults.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

To define service coordinator defaults:

1. Select Services Procurement, Maintain Users, Service Coordinator Defaults.
2. Enter the service coordinator's user ID of the user you want to update.
3. Enter the information provided by default when a work order is created.
4. If a service is defined without an entry in the Service Type field, select the service type applicable for the service.
5. Enter the Notification options.

6. Select the May Enter Work Order or May Extend Work Order check boxes to allow the user to add or extend work orders.
7. Select the Authorized to Delegate check box if the user is authorized to do so.
8. Select the Authorized to Change Sourcing Rules check box if the user is authorized to do so.
9. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

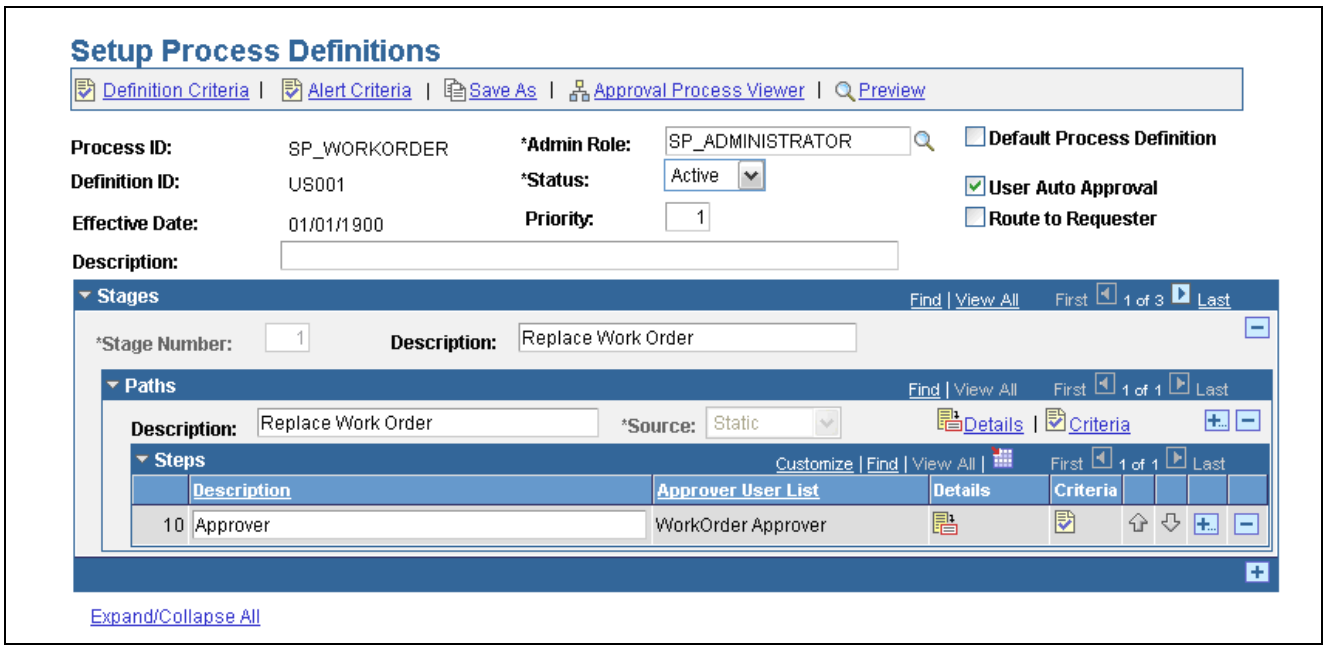
Task 6-24-14: Adding Replacement Work Order Approval

The replacement work order approval process is new in this PeopleSoft FSCM release. In this step, you add a replacement work order process definition and associate it with the approval user list that you created in your previous PeopleSoft FSCM release. Evaluate the results from query UPG_SPP716 to determine the setIDs for which new work order approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process. Do not create new approval process definitions for those setIDs that already have one. Instead, complete the following steps to update an existing approval process definition.

To add the replacement work order stage to an existing SP_WORKORDER approval process:

1. Select Set Up Financials/Supply Chain, Common Definitions, Approvals, Setup Process Definitions.
2. Select the most current effective-dated SP_WORKORDER.
3. Save the approval process definition with a new effective date.

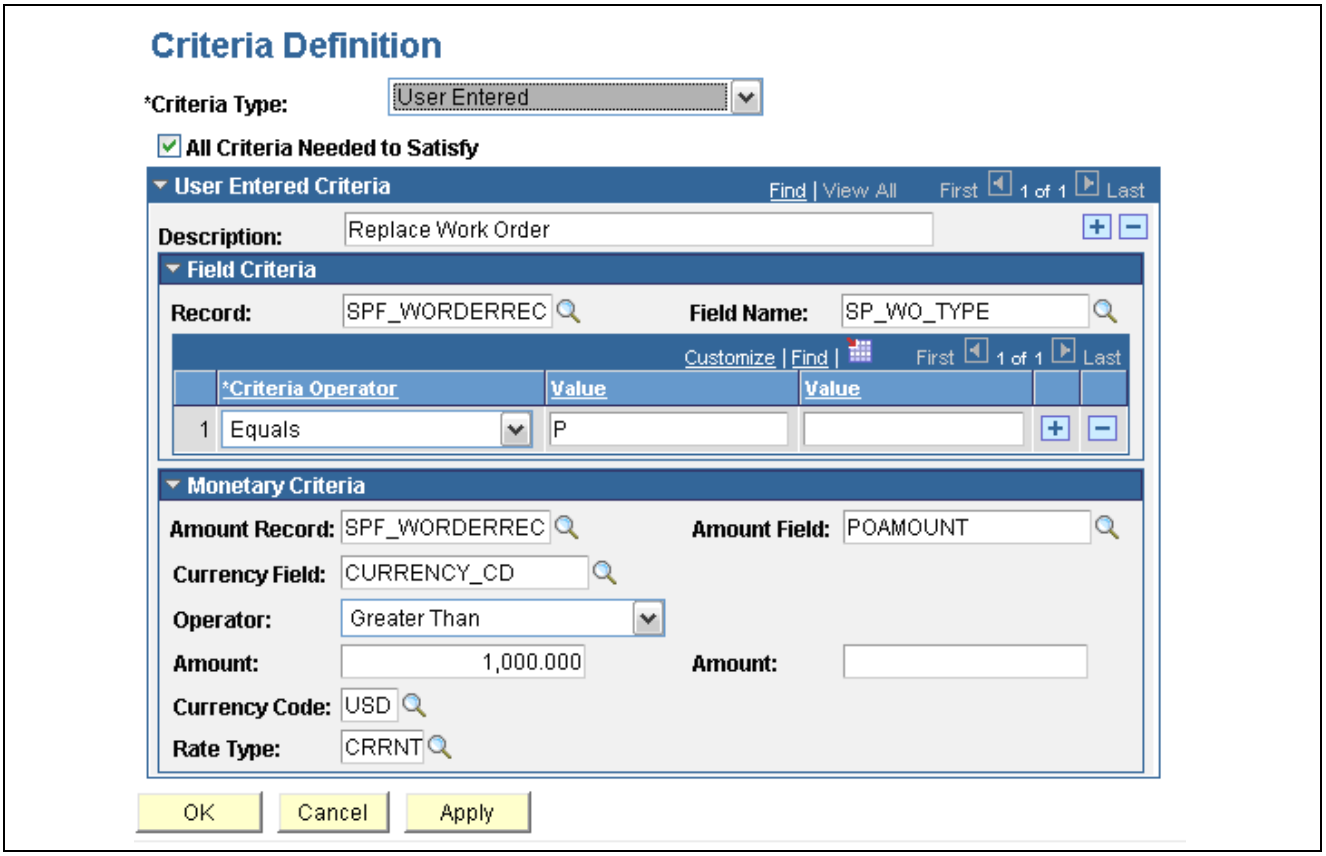
   An example of the Setup Process Definitions page follows:



Setup Process Definitions page

4. Click the Add (+) button in the Stages section to add a new stage.
5. Click the Alert Criteria link to add criteria for alerts.

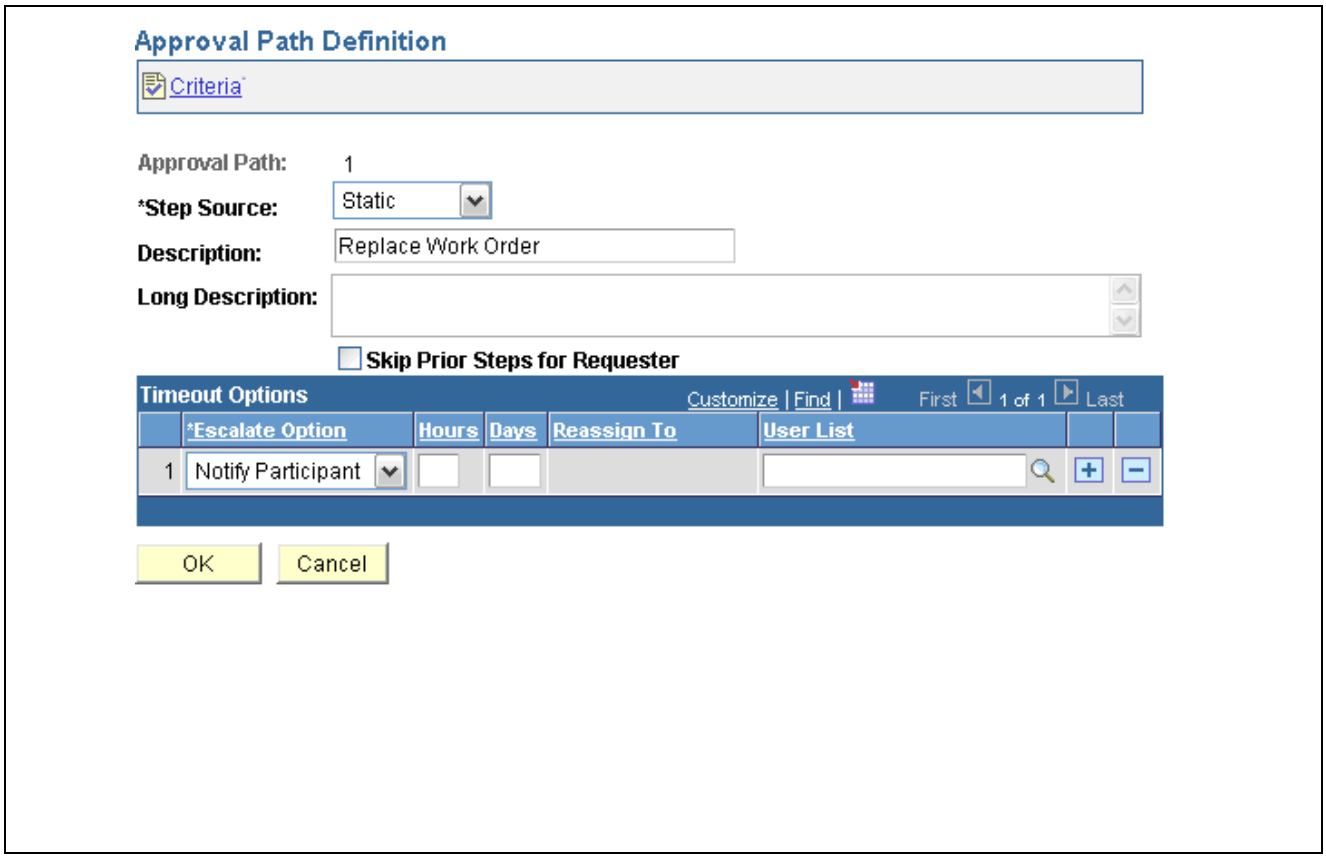
   The Criteria Definition page appears.



Criteria Definition page

6. Click the OK button to return to the Setup Process Definitions page and click Save.
7. In the Paths section, click the Paths Details link to add path information.

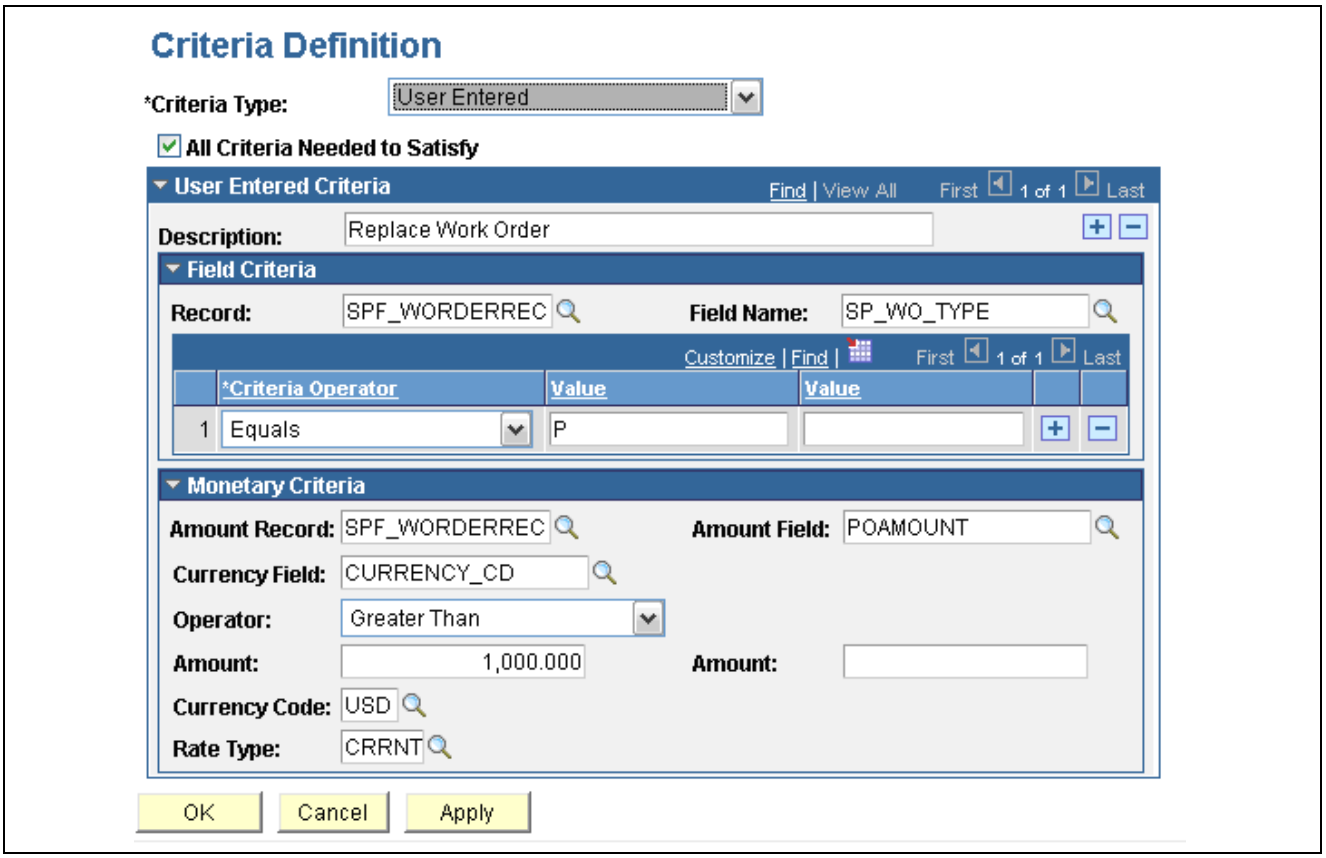
   The Approval Path Definition page appears.



Approval Path Definition page

8. Click the Criteria link to add the criteria for the approval path, if any.

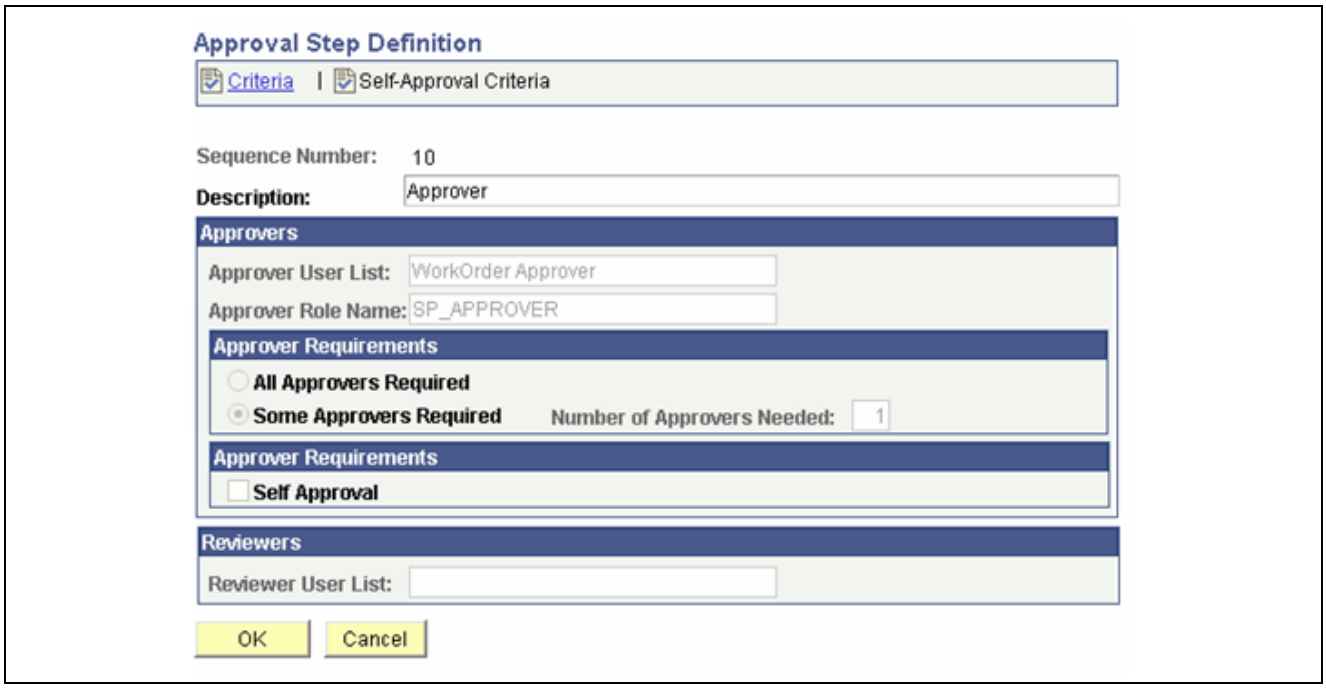
   The Criteria Definition page appears.



Criteria Definition page

9. Click the OK button to return to the Approval Path Definition page.
10. Click OK.
11. In the Steps section, click the Steps Details link to add approval step details.

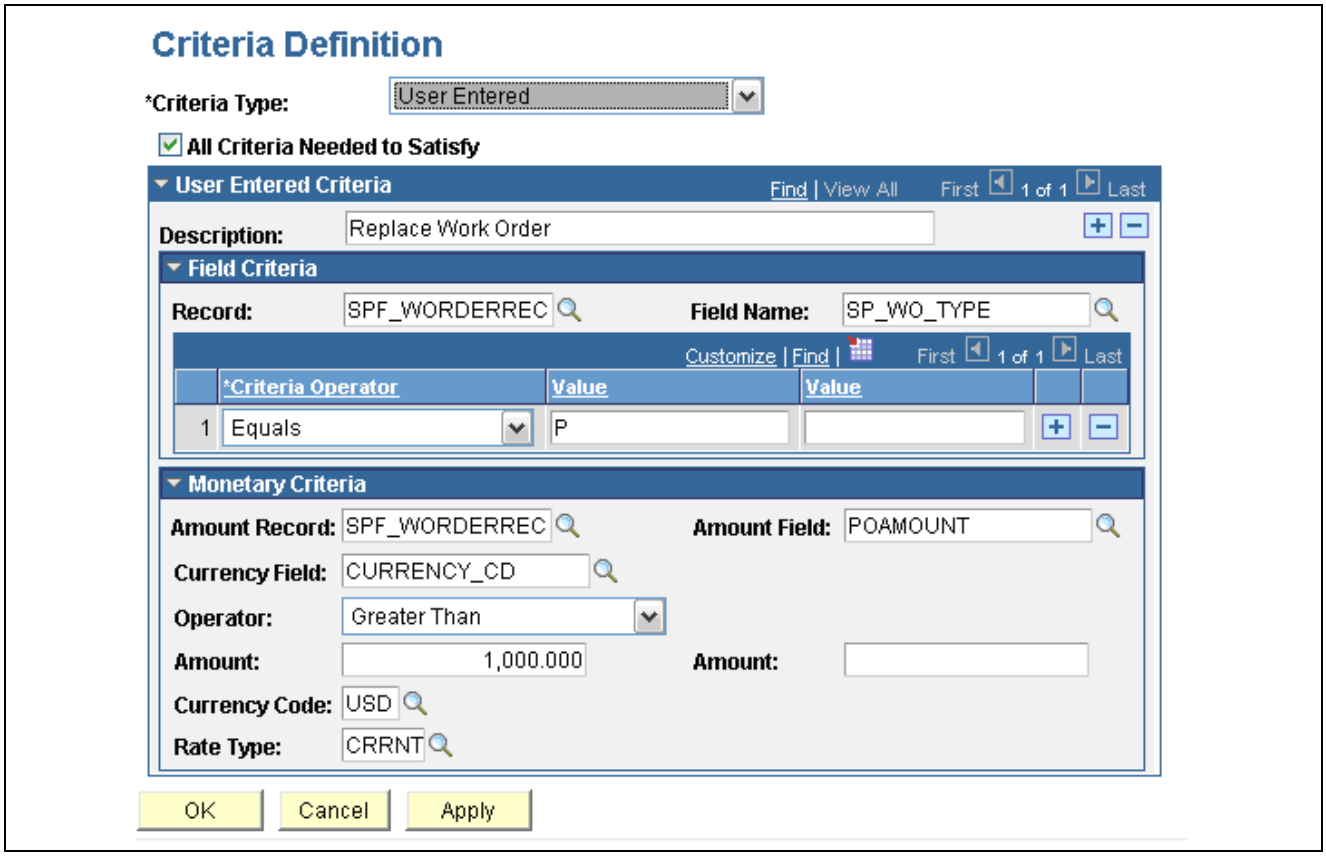
    The Approval Step Definition page appears.



Approval Step Definition page

12. Click the Criteria link to enter the approval criteria for the step.

    The Criteria Definition page appears.



Criteria Definition page

13. Click the OK button to return to the Approval Step Definition page.
14. Click OK.
15. Change the status of the approval process definition to *Active*.
16. Click Save to save your process definition.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-15: Setting Auto-Numbering for Timesheets

If you have not already done so, set up the automatic numbering scheme for the PeopleSoft Services Procurement Timesheet number type.

To set auto-numbering for time sheets:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. Enter a valid setID and select *Services Procurement Timesheet* from the Number Type drop-down list.
3. Click Add a New Value.
4. For the field name, select the default *TIME_SHEET_ID*.
5. Enter the start sequences, maximum length, description, and last number issued information.
6. Click Save.
7. Repeat steps 2 through 6 for every setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-16: Setting Auto-Numbering for Progress Logs

If you have not already done so, set up the automatic numbering scheme for the Service Progress Logs number type.

To set auto-numbering for progress logs:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. Enter a valid setID and select *Service Progress Logs* from the Number Type drop-down list.
3. Click Add a New Value.
4. For the field name, select the default *PLOG_ID*.

5. Enter the start sequences, maximum length, description, and last number issued information.
6. Click Save.
7. Repeat steps 2 through 6 for every setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-17: Reconciling sPro Notification Templates

The notification templates for the following components have been modified:

- SPF_BID
- SPF_BIDRESPONSE
- SPF_CBID_RSP_COMP
- SPF_CLIBID_COMP
- SPF_CBID_RSP_COMP
- SPF_RBID_RSP_COMP
- SPF_SUBMITTAL
- SPF_REQ_LN_STTS – templates FILLED and CANCEL2

The notification templates for the following components are new:

- SPA_APR_ROSTER
- SPA_EXP_APR_ROSTER
- SPA_EXPENSE2
- SPA_MANAGE_PLOGS
- SPA_TIME (replaces SPS_TIME_ENTRY2)
- SPA_TIME_APPROVAL
- SPF_DEFN_REQ_RATES
- SPF_WO_APPR_CMP
- SPF_WORDER_ROSTER
- SPF_WORK_ORDER_CMP (replaces SPF_WORDERCOMP)

Reconcile the notification template text and the notification template variables for the components listed previously.

To access the notification template information:

1. Sign in as Administrator.
2. Select PeopleTools, Workflow, Notifications, Notification Templates.

To access the notification template variable information:

1. Sign in as Administrator.
2. Select PeopleTools, Workflow, Notifications, Template Variables.

See *PeopleSoft 9.1 Services Procurement PeopleBook.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-18: Reviewing Time and Progress Log Templates

This section discusses:

- Updating Set Control Value for Time Template Record Group
- Creating Calendars for Time Reporting
- Creating Time Reporting Rules
- Associating Calendars and Rules to Time Templates

Updating Set Control Value for Time Template Record Group

In the current PeopleSoft FSCM release, the Services Time Reporting feature was enhanced to meet a broader set of reporting needs. Time templates are now grouped by setID rather than business unit. Existing service templates were modified during the upgrade to convert business units to setIDs. Evaluate the results from the pre-upgrade query, UPG_SPP706, against the upgraded data to ensure that your service templates meet your requirements. For each business unit that was converted to a setID as identified in the query, you will need to manually change the setID for the service time templates record group (SP_12) to be the same as the set control value.

To manually change the setID for each converted business unit:

1. Sign in as Administrator.
2. Select PeopleTools, Utilities, Administration, TableSet Control.
3. Enter the set control value (for example, business unit) in the search criteria.
4. Find the service time templates record group, SP_12.
5. Change the existing setID value to the value of the set control value.
6. Click Save.
7. Repeat steps 3 through 6 for each business unit identified in the UPG_SPP706 query results.

Creating Calendars for Time Reporting

If you have not set up any calendars, you will need to create them and associate them to the time template. You will use the results from the post-upgrade query UPG_SPP708 to assist you in creating the calendars.

To create a calendar:

1. Sign in as an Administrator.

2. Select Services Procurement, Define Services Procurement.
3. Select System-Wide Definitions from the General Setup folder and click the Calendar Builder link.
4. Create a new calendar.
5. Enter a description, begin date, end date, and long description.
6. Enter the fiscal year if different from the default value.
7. Select the calendar type based on the distinct time periods from query UPG_SPP708 (for example, daily, weekly, bi-weekly, and so forth). Note that additional options may be available, depending on the calendar type you select.
8. Click Generate to populate the Detail Periods grid.
9. Click Save.
10. Repeat for each distinct time period as identified in the query results.

Creating Time Reporting Rules

This step is optional if you have time templates that do not use overtime.

The current release uses time reporting rules for calculating different payouts. If your previous time templates are set up for overtime reporting, you will need to create new time reporting rules for each setID identified in the two post-upgrade queries UPG_SPQ707 and UPG_SPP708 to allow you to continue to report overtime. These new time reporting rules will replace the previous overtime reporting rules. Refer to the sample data provided in the new release Demo database for a time reporting rule that uses daily overtime.

To set up time reporting rules:

1. Sign in as Administrator.
2. Select Services Procurement, Define Services Procurement.
3. Select Time and Expense Setup from the Settlement Setup folder.
4. Click Time Reporting Rules.
5. Create a new time reporting rule ID for each overtime rule and setID listed in the query results from UPG_SPQ707 and UPG_SPP708.

   Based on your time reporting needs, some of the previous overtime rules may be consolidated into the new time reporting rule.
6. Enter values for the effective date, description, and default time reporting code (TRC).
7. For the rule scope, select *Date, Day of Week,* or *Time Period.*
8. For the rule type, select *Time Quantity* or *TRC List*.
9. Enter the information as it appears for the rule scope selected in the grid.
10. Click Save.

Note. If you do not have TRCs set up for overtime, you must first define the overtime TRC.

Associating Calendars and Rules to Time Templates

Use the results from query UPG_SPP708 to review and attach calendars and time reporting rules to the appropriate time templates.

To review and associate calendars to time templates:

1. Sign in as Administrator.
2. Select Services Procurement, Define Services Procurement.
3. Select Time and Expense Setup from the Settlement Setup folder.
4. Click Service Time/Progress Template.
5. Enter the name of the template that you want to edit.
6. To attach the calendar, select the Service Calendar by clicking the search icon.
7. To associate a time reporting rule, select the Time Reporting Rule ID by clicking the search icon.
8. Enter the remaining information as needed.
9. Click Save.

See *PeopleSoft Services Procurement 9.1 PeopleBook.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-19: Reviewing Vendor Setup Information

PeopleSoft Services Procurement now looks to the common vendor setup tables to obtain the minority-owned and women-owned vendor attributes. You will use the results of query UPG_SPM709 that you created in the chapter "Preparing Your Database for Upgrade," step Reviewing the Pre-Upgrade sPro Queries, to reconcile any exceptions that are found.

To correct discrepancies:

1. Select Vendors, Vendor Information, Add/Update, Vendor.
2. Enter a vendor ID from the query results.
3. Select the Identifying Information tab.
4. Scroll to the bottom of the page and expand the Additional Reporting Elements option.
5. Modify the type of contractor, as needed.
6. Modify the woman-owned business option, as needed.

Note. Currently, only the *minority institution* contractor type and the woman-owned business option are mapped to the minority-owned and woman-owned fields on the Services Supplier Info page. All other reporting attributes are not supported by PeopleSoft Services Procurement at this time.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-24-20: Running the sPro Approvals Post-Upgrade Process

After the Approval Workflow Engine setup has been completed, run the sPro post-upgrade process to convert pending worklist entries for timesheets, expenses, and progress logs to Approval Workflow Engine worklist entries. This process also archives old worklist entries.

1. Select Set Up Financials/Supply Chain, Upgrade, sPro Approvals Post Upgrade.
2. Run the UPG_SP_POST process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 6-25: Completing Supplier Contracts Setup

This section discusses:

- Synchronizing the SCMT Library with Bind Mappings
- Reviewing Worklist Entries and Email Notifications
- Copying Attachments to the Database Server
- Creating a Document Change History Record

Task 6-25-1: Synchronizing the SCMT Library with Bind Mappings

If you have implemented Oracle's PeopleSoft Supplier Contract Management, you need to perform this task.

The Purchase Order source transaction is a new source transaction delivered in PeopleSoft FSCM 9.1. This task ensures that any existing PeopleSoft Supplier Contract Management (SCMT) library objects are synchronized with any applicable new bind mapping values that were delivered for the new Purchase Order source transaction.

Since library objects can belong to more than one source, this process reviews all existing library objects to see whether they are applicable to the new Purchase Order source transaction. Every library object has attributes that define which source transactions are applicable based on the binds used within the object. So, if an existing library object has binds that are also applicable in the new source, then it has to be updated to reflect that.

To synchronize the library objects with the new bind mapping values for the new Purchase Order source transaction:

1. Select Set Up Financials/Supply Chain, Upgrade, SCMT — Upgrade Bind Mappings.
2. Create a new run control ID.
3. Click Run to submit the process.

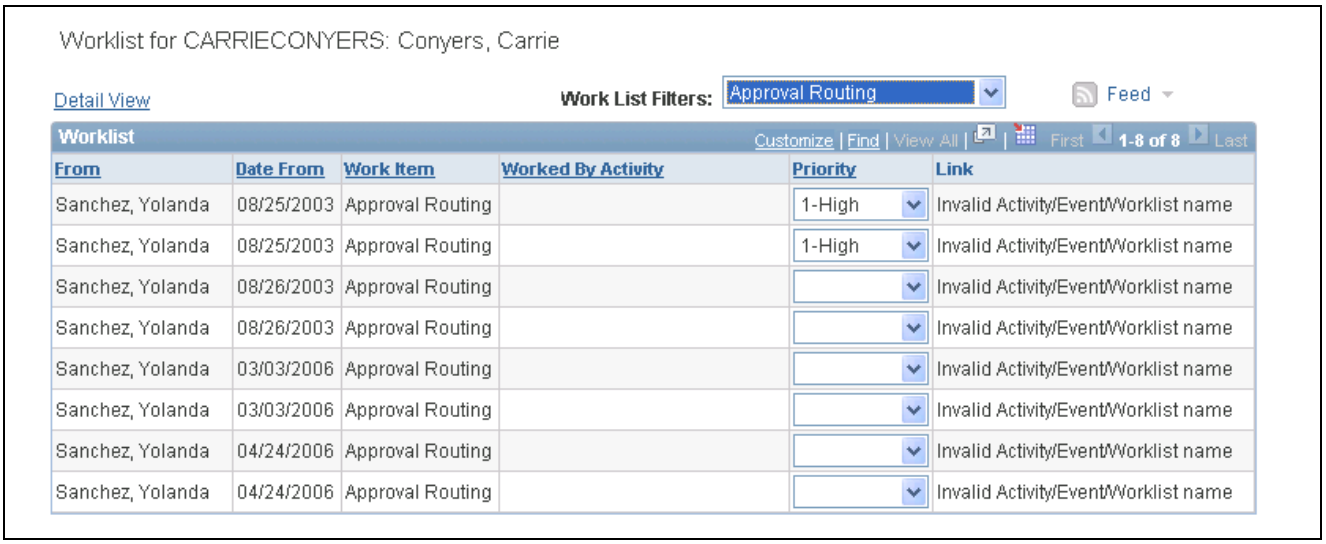
Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

Task 6-25-2: Reviewing Worklist Entries and Email Notifications

In the new release, the Work Item name “Approval Routing” changed to “Contract Compliance Notice” and the Worked by Activity name “Redirect” changed to “Review or Update Agreement.” As a result, if you did not complete the processing of your worklist entries before the upgrade in the chapter “Preparing Your Database for Upgrade,” task Processing Worklist Entries and Email Notification, you will no longer to able to access the old worklist entries or process them after the upgrade. You will need to resend the notifications.

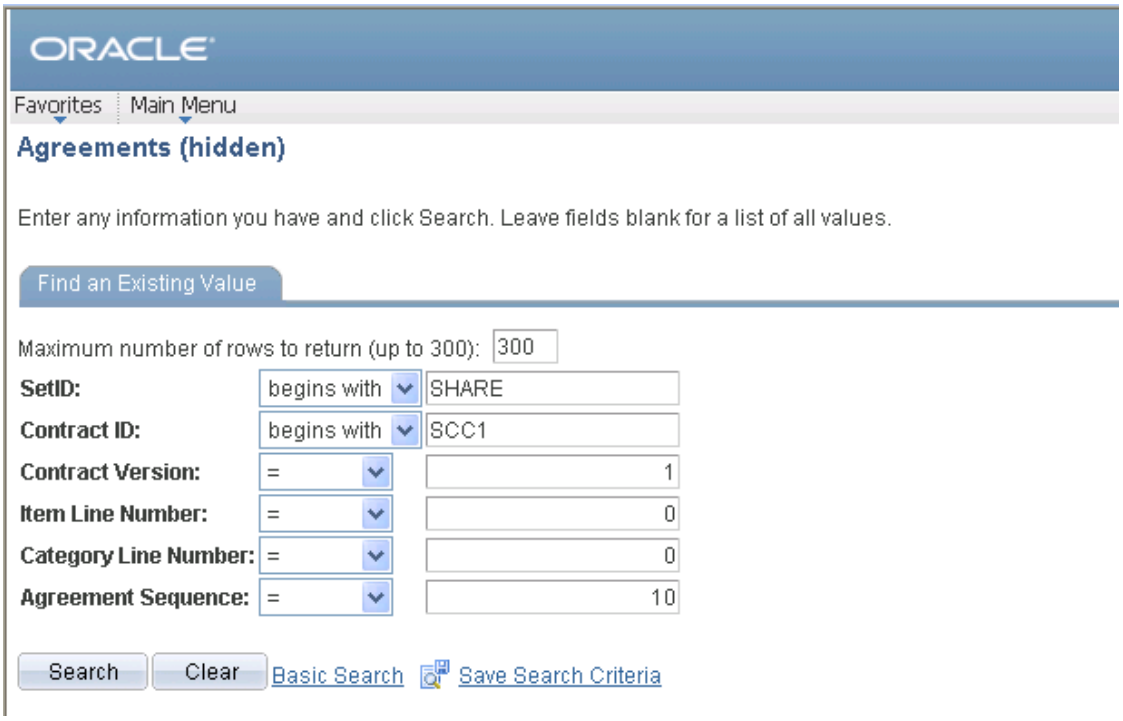
If you did not clear your worklist entries before the upgrade, they will appear on the Worklist page as invalid entries, as shown in the following example:



Worklist page

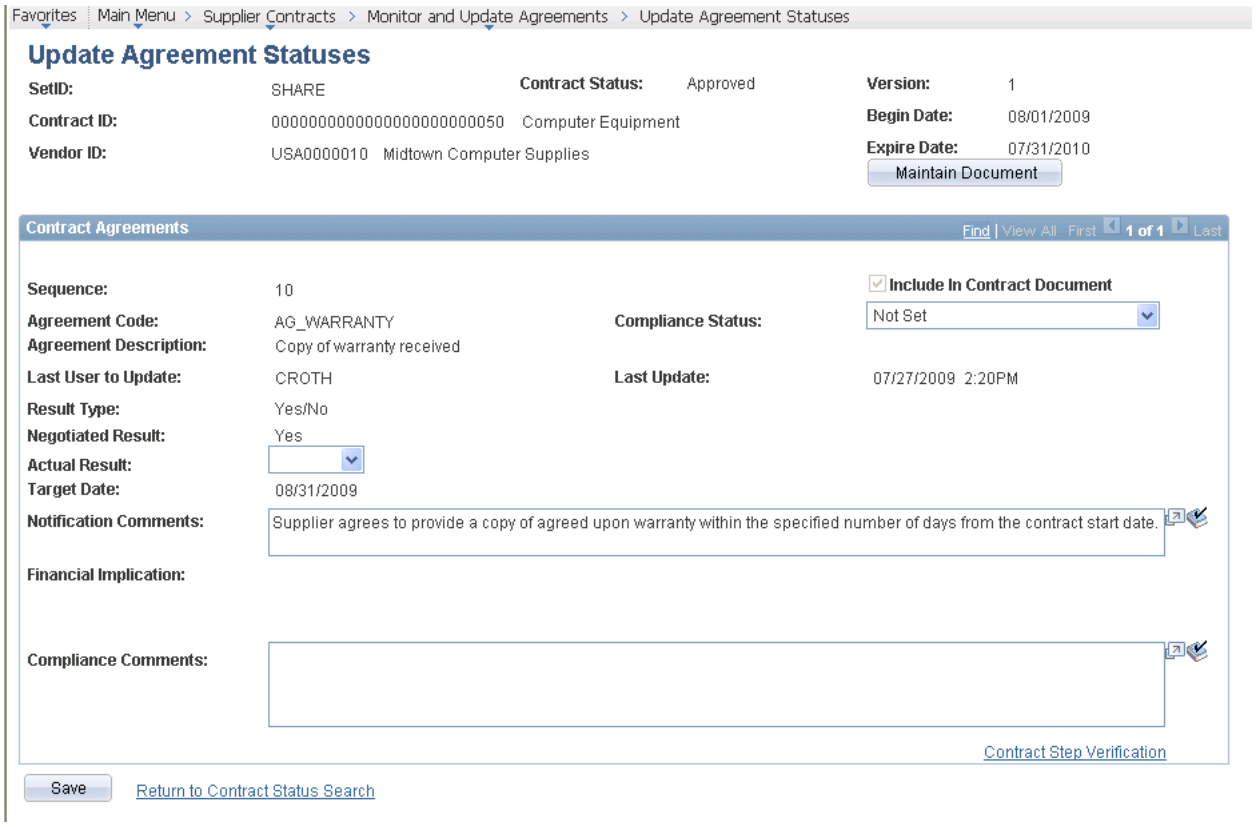
Click Search and update the information on the Update Agreement Statuses page.

For email notifications that you did not process before the upgrade, when you select an email link, the system will bring you to a search dialog with the information from the email filled out, as shown in the following example:



Agreements search page

Click Search and the Update Agreement Statuses page appears. You can then update the information as needed. Following is an example of the Update Agreement Statuses page.



Update Agreement Statuses page

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

Task 6-25-3: Copying Attachments to the Database Server

This section discusses:

- Understanding Copying Attachments
- Setting Up the Database Server
- Running the Copy Process

Understanding Copying Attachments

If you have implemented PeopleSoft Supplier Contract Management (SCMT) prior to PeopleSoft FSCM 9.1 and want to use the PeopleSoft FSCM 9.1 database server option instead of the FTP server for PeopleSoft SCMT attachments (files that include authored documents and attachments), then you need to perform this task. In PeopleSoft FSCM 9.1, you can use the database server for all attachments in PeopleSoft SCMT.

PeopleSoft FSCM 9.1 provides a utility that allows you to upgrade FTP server attachments from prior releases to the database server, ensuring that all existing FTP attachments are copied to the database server and all related links are updated to point to the new location. The new utility is specifically intended for PeopleSoft SCMT customers on PeopleSoft FSCM 9.0 or earlier who are currently using FTP for PeopleSoft SCMT (installation option for FTP server override), but are using the database server for all other Supplier Relationship Management (SRM) products in PeopleSoft FSCM 9.0.

This utility allows a one-time movement of PeopleSoft SCMT documents from FTP to the database after upgrading to PeopleSoft FSCM 9.1. You can optionally continue to run supplier contracts in FTP as you did in prior releases, if desired. This process will only upgrade files that exist on the contract documents as of the PeopleSoft FSCM 9.0 release. This means that it does not upgrade files related to new features in PeopleSoft FSCM 9.1 such as the Executive Summary, external attachments, and signature files. If this process is run *after* you have used these new PeopleSoft FSCM 9.1 features, the newly added PeopleSoft FSCM 9.1 documents and attachments will not be upgraded. Note that this process will not upgrade any transaction-related attachments for SRM products outside of PeopleSoft SCMT. This process will select documents as instructed by the run control selection criteria, finding the FTP document, amendment, and manually loaded attachments in both the main and history files. It will then load the files to the database server and update the references to point to the database server. It uses the existing file names.

Note that this process loads the FTP files to a temporary location, then uploads them from there to the database server. The temporary server is determined by the TEMP environment variable on your application server machine, and if that does not exist then the TMP environment variable is used. You should manually remove the files from the temporary server after processing is complete. Also, this process does not remove the files from the FTP server. If you wish to do so, you must be careful to only remove the files that are on the database server. You can determine which files are on the database server by looking at PV_ATTACHMENTS where the server points to a database server. This is a single-direction utility with no *undo* capability for PeopleSoft SCMT. If you decide to switch back from database to FTP server, then any new document activity, such as checkins or uploads, used in PeopleSoft SCMT will remain within the database until they are checked back in or uploaded after switching back to FTP.

Review the following considerations before completing this task:

- Timing Considerations

  This process should be run post upgrade. Ideally all documents should be migrated before resuming normal database activity. If this is not feasible, the process can be run after PeopleSoft FSCM 9.1 entry has begun. But be sure that your file attachment server is pointing to a database server and that the Override Attachment Server field (mentioned in step 3 in the instructions below) is blank. If it is pointing to an FTP server, and new PeopleSoft FSCM 9.1 features such as Executive Summary, external files, and signature files have been used, these types of new PeopleSoft FSCM 9.1 feature files will not be copied to the database server

- Verity Considerations

  If you are currently using the Verity Build Search Index run control option "Attachment Server Network Path" to map a network drive for Verity builds, be aware that this feature uses less application server space for building the Verity index. Files stored in the database server with Verity require that each file be temporarily saved to the application server first before the Verity process can build the index. You should take into consideration your application server disk space and performance, depending on the volumes of your documents and attachments.

Follow the steps below to set up the database server and then run the process, which will copy your pre-PeopleSoft FSCM 9.1 SCMT documents and attachments to the database server.

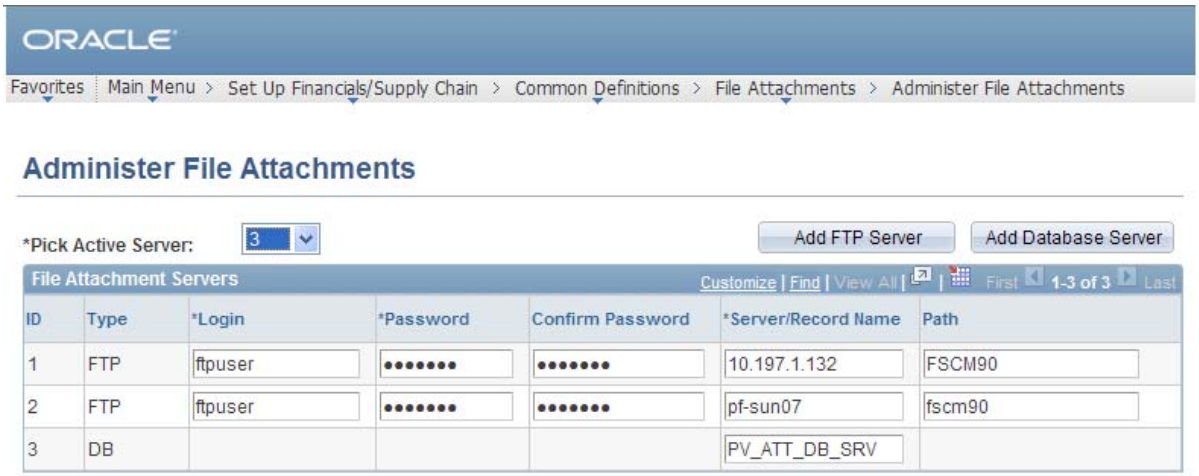
Setting Up the Database Server

You must make sure that you are using the database server before running the utility.

To set up the database server:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.

   The Administer File Attachments page appears.



Administer File Attachments page

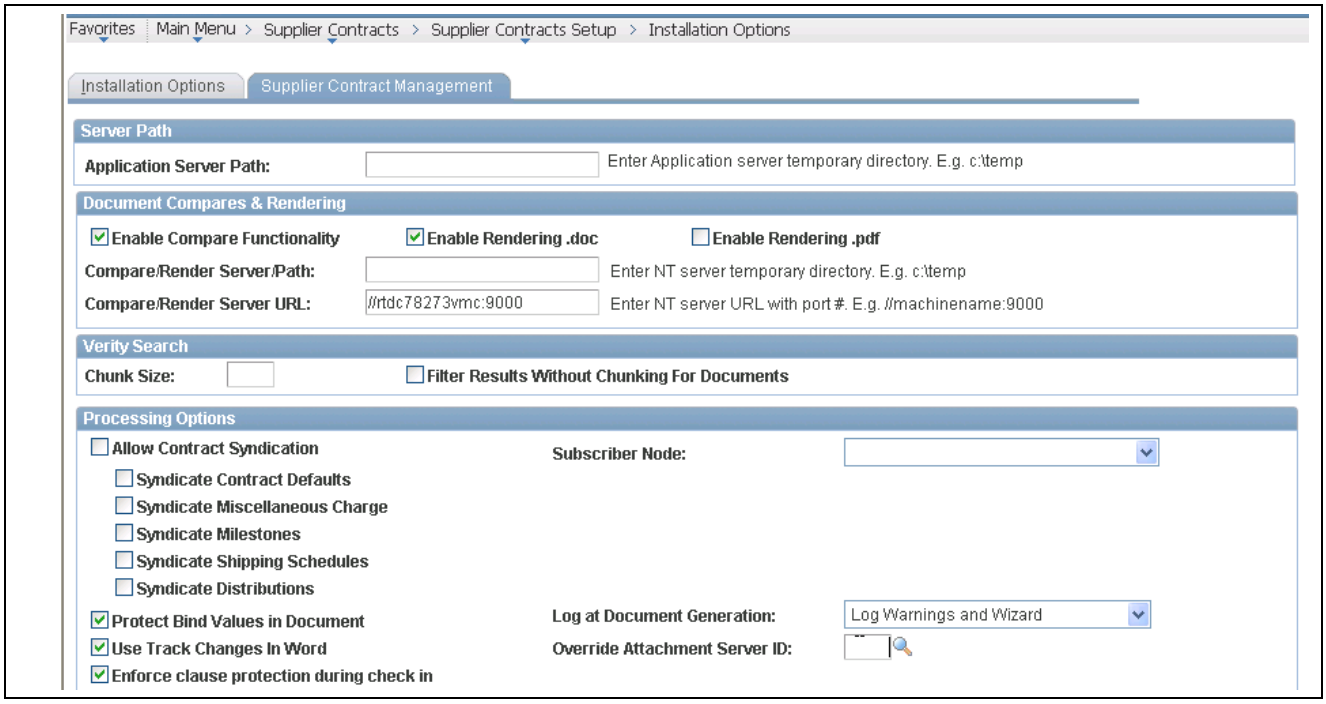
2. Ensure that the value in the Pick Active Server field points to a server of the type DB.
3. Select Set Up Financials/Supply Chain, Install, Installation Options.

   The Installation Options page appears.

Installation Options page

4. Select the Supplier Contract Management link.

   The Supplier Contract Management Installation Options page appears.



Supplier Contract Management Installation Options page

5. On the Supplier Contract Management Installation Options page, ensure that the Override Attachment Server field is either blank or refers to a server of the type DB.

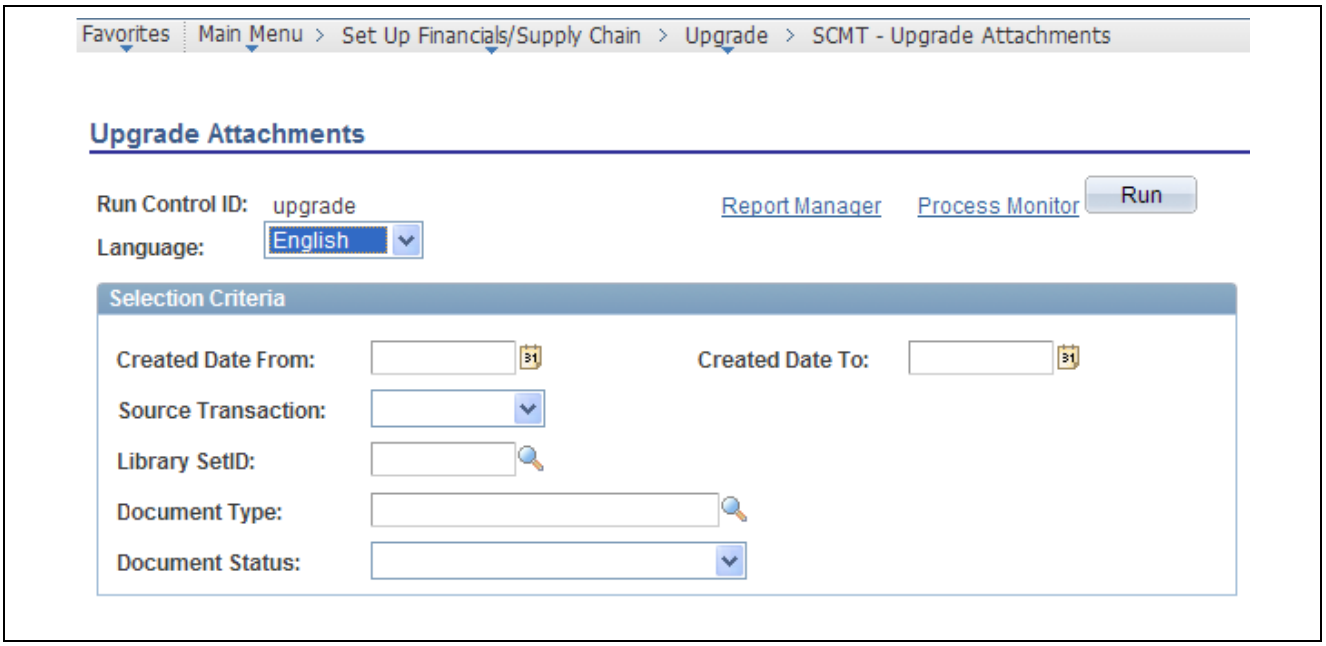
Running the Copy Process

Run the program to copy the documents and attachments from the FTP server to the database serer.

To run the copy process:

1. Select Set Up Financials/Supply Chain, Upgrade, SCMT — Upgrade Attachments.
2. Create a new run control ID.

   The following example shows the Upgrade Attachments page:



Upgrade Attachments page

3. Optionally, you can enter selection criteria to process a subset of documents at a time.

   This may be necessary to reduce job run time. If entering selection criteria, be sure to eventually run through all possible options so all documents and attachments are upgraded.
4. Click Save.

   Note that you will receive a warning message if the database server is *not* the default server. If you click Run at this point, the process will still run but nothing will be processed. The process will issue a log message explaining the error.

   You will also receive a warning message if the number of impacted contracts based on your selection criteria exceeds 100. This job could take significant time, depending on the number of files per document. You may want to consider refining your selection criteria depending on system performance. Note that when the process is started, it will only select those documents within the selection criteria range that are on the FTP server. So in the case where the user selects a range of 100 documents for which this process has already run and no documents are left on the database server, nothing will be processed.
5. Click Run to submit the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

Task 6-25-4: Creating a Document Change History Record

A new report is delivered in PeopleSoft FSCM 9.1 to show all contract object deviations in contract documents. Prior to PeopleSoft FSCM 9.1, only the latest changes were being tracked and stored in the database. Without running this post-upgrade step, the report will only show the current object deviations in the contract documents and exclude all changes in previous amendments.

This post-upgrade utility will create a record of the historical changes to all authored contract documents for historical deviation reporting purposes. The process involves downloading the original contract document from the FTP server, parsing the file, and comparing the original document content with the current document content.

This utility can be run any time after your database is upgraded to PeopleSoft FSCM 9.1. It has no impact on new contract documents created after the upgrade.

To create an historical record of document changes since the documents were created:

1. Select Set Up Financials/Supply Chain, Upgrade, SCMT — Prior Object Deviations.
2. Create a new run control ID.
3. Enter criteria or leave all criteria blank to obtain changes for all documents.

   If you have large volumes of documents, it is recommended that the documents be processed in smaller sets by using selection criteria such as the Created Date From and Created Date To fields. The process can be run multiple times and will ignore any documents that already have correct history information.
4. Click Save.

   You will see the number of contract documents to be processed, based on the selection criteria that you entered.
5. Click Run to submit the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Supplier Contract Management	All	All

Task 6-26: Configuring PayBill Management

This section discusses:

- Updating Product IDs for Contract Profiles

- Configuring Reopen Assignments Options

Task 6-26-1: Updating Product IDs for Contract Profiles

In this step, you update the PeopleSoft Pay/Bill Management product ID for each contract profile.

To update the PeopleSoft Pay/Bill Management product ID:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Contract Profile.
2. Enter the business unit that you want to update.
3. Click the Search button in the Product ID field and select the appropriate value from the Search Results list.
4. Repeat this step for each contract profile.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Pay/Bill Management	All	All

Task 6-26-2: Configuring Reopen Assignments Options

In the new release, the Staffing Installation page has a new Reopen Assignments Options section with two new check boxes: Allow Reactivate Closed Assign and Allow Additional Assignments. If you are upgrading from PeopleSoft Staffing Front Office 8.8, after the upgrade is complete, both check boxes will be deselected. You will need to select one of the options before you can create new assignments. After the upgrade, you will need to decide whether you will continue to use the 8.8 job data model which allows you to reactivate a closed assignment, or whether you will use the new job data model which does not allow you to reactivate a closed assignment.

To configure Reopen Assignments Options:

1. Select Set Up Financials/Supply Chain Management, Install, Installation Options.
2. Select Staffing.
3. In the Reopen Assignments Options section, select Allow Reactivate Closed Assignments or Allow Additional Assignments.

Important! Once you save the page, you cannot change this option.

See PeopleSoft Application Fundamentals 9.1 PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up Application-Specific Installation Options.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Pay/Bill Management	All	All

Task 6-27: Preparing Treasury Setup

This section discusses:

- Rerunning Auto Position Process
- Updating Market Exchange Codes
- Setting Up New Facilities
- Setting Up Document Sequencing
- Adding the Issue Date for Securities
- Adding CUSIP for Security

Task 6-27-1: Rerunning Auto Position Process

In this step, you will rerun the Auto Position processes for all deals. This action will process every deal to calculate the cash flows, position, and accounting events, which will reflect changes to the deals during the upgrade.

To re-run the Auto Position processes:

1. Select Deal Management, Capture Deals, Deal Position Update.
2. Select the Process All Outstanding Deals option and run the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management Risk Management	All	All

Task 6-27-2: Updating Market Exchange Codes

In the new release, a Country field has been added to the Market/Exchange Codes page. You need to populate this field appropriately with the name of the country to which the market or exchange belongs.

To update market/exchange codes:

1. Select Set Up Financials/Supply Chain, Product Related, Treasury, Market/Exchange Codes.
2. Select each market and exchange and populate the Country fields appropriately.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Cash Management Deal Management Risk Management	All	All

Task 6-27-3: Setting Up New Facilities

This section discusses:

- Creating New Facilities
- Updating Existing Instruments

Creating New Facilities

In the new PeopleSoft FSCM release, two new facility types are introduced: commercial paper and line of credit. To use the new functionality, you must create new facilities using the new facility types.

To create new facilities:

1. Select Deal Management, Administer Deals, Facilities for Issuing Debt.
2. Add a new facility, selecting the appropriate facility type.

Updating Existing Instruments

Prior to the new PeopleSoft FSCM release, commercial paper and line of credit deals were not explicitly defined. To enable this new feature, the commercial paper or line of credit attribute check boxes must be selected for existing instruments.

To update existing instruments:

1. Select Deal Management, Administer Deals, Define Instruments.
2. Select the instrument to be updated.
3. On the Instrument Detail tab, select either the commercial paper or line of credit attribute at the bottom of the page.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 6-27-4: Setting Up Document Sequencing

If you have document sequencing enabled, you need to make sure the document type field is populated for each accounting template.

To update the accounting template with a document type:

1. Select Cash Management, Treasury Accounting, Accounting Templates.
2. Open the appropriate accounting template and specify a documentation type for the template.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 6-27-5: Adding the Issue Date for Securities

The Issue Date field needs to be populated for all upgrade paths.

To add issue dates for securities:

1. Select Deal Management, Administer Deals, Securities.
2. Open the appropriate security and add an issue date.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 6-27-6: Adding CUSIP for Security

The CUSIP IDfield is a new, required field in the new PeopleSoft FSCM release. It must be populated for all securities.

Note. Complete this step only if you license PeopleSoft Deal Management.

To update the CUSIP ID field:

1. Select Deal Management, Administer Deals, Securities.
2. Open the appropriate security and add the CUSIP ID.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 6-28: Reviewing Electronic Layouts for Banks

In the new release, Electronic Layouts have been added to Collection and Payment Methods on External Accounts. After the initial upgrade, you should review the layouts for each payment method for each account. Payments may be settled through either Pay Cycle Manager or the Financial Gateway, and at least one layout must be the default layout that will be used for all logic provided by default.

To update Electronic Layouts for banks:

1. Select Banking, Bank Accounts, External Accounts.
2. Select the Collection Methods – Review the Electronic Layout grid.
3. Add new Electronic Layouts or modify existing layouts, if applicable.
4. Select the Payment Methods – Review the Electronic Layout grid.
5. Add new Electronic Layouts or modify existing layouts, if applicable.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Cash Management Deal Management Risk Management	All	All

Task 6-29: Completing Setup for Projects

This section discusses:

- Setting Up Analysis Type and Analysis Group
- Linking Project Status to Process Status
- Setting Unit of Measure for Hours and Days
- Setting Project Calendar
- Running Summary Refresh
- Calculating Team Member Duration
- Setting Default Project Manager Role
- Reviewing Rate Template Mapping
- Entering the Funds Distribution Threshold Amount
- Creating a Project Compression Template

Task 6-29-1: Setting Up Analysis Type and Analysis Group

Many analysis types and analysis groups are integral to project processes. The upgrade delivers any additions or changes to the required analysis types and analysis groups under the projects-owned setIDs of SHARE, MODEL and MFG. However, other setIDs were not updated because of the risk of overwriting any changes you may have made to these user-configurable variables. You will need to analyze the system-defined analysis types and analysis groups found under the SHARE setID and determine which additions or changes to migrate to any other setID that you use for projects processing.

Access these tables, using the navigation shown, to perform further analysis:

- Projects Analysis Groups – PS_PROJ_AN_GRP_TBL: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Groups.
- Projects Analysis Types – PS_PROJ_ANTYPE_TBL: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Types.
- Projects Analysis Group Mapping – PS_PROJ_AN_GRP_MAP: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Groups.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 6-29-2: Linking Project Status to Process Status

This section discusses:

- Assigning a Processing Status to Each Status Type
- Defining Project Status Defaults
- Creating Project Status Based on Project Processing Status

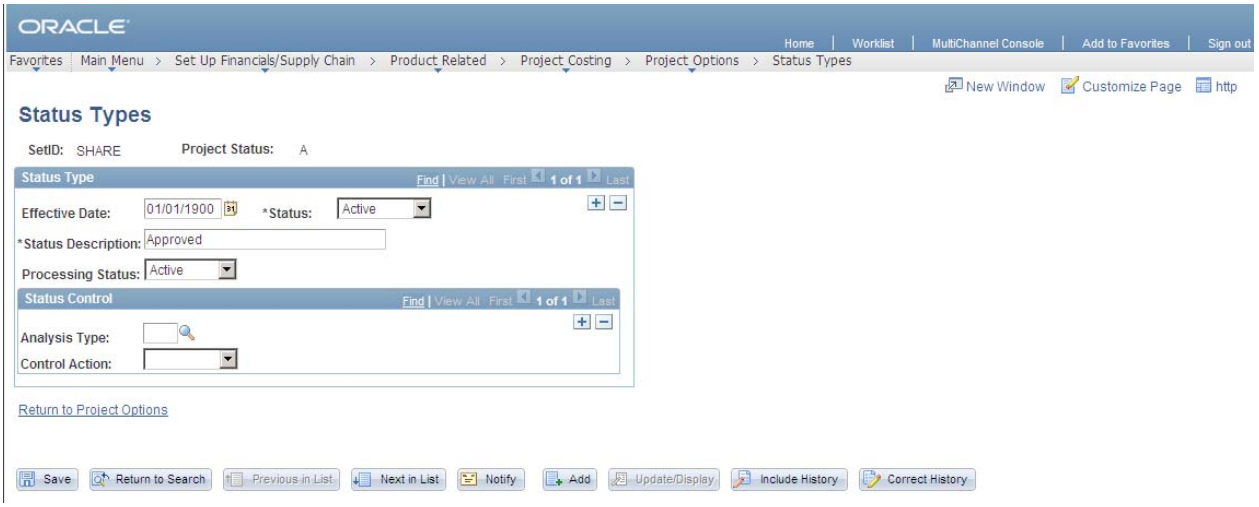
Assigning a Processing Status to Each Status Type

The processing status of a project is now based on the project status. For each status type defined in the system, you need to assign a processing status to that status type. If you do not have any status types defined in your system, you may skip this step.

To assign a processing status to each status type:

1. Select Set Up Financials/Supply Chain, Product Related, Project Costing, Project Options, Status Types. Make sure you are in Change History mode.

   The Status Types page appears:



Status Types page

2. For each defined status type, select the appropriate processing status.

   You will receive an informational message indicating that you are changing the project to processing status linkage on an existing effective-dated row. You can ignore this message.

3. Click OK and then save your changes.

4. When you have finished updating each existing status type, you should have at least one status type with a processing status of *Active,* one with a processing status of *Pending,* and one with a processing status of *Inactive.* If you do not have a status type with any one of these three processing statuses, you must create a new status type with the processing status that is missing.

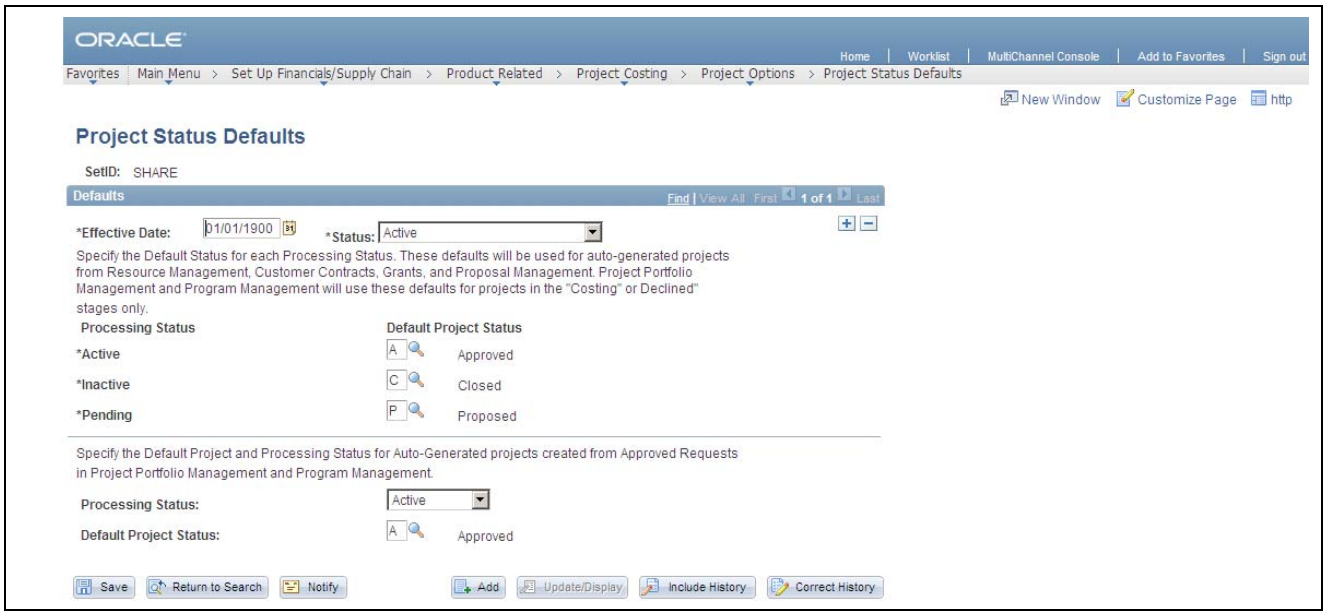
Defining Project Status Defaults

For each SetID defined in the system, define the default project status for new projects. If you do not have any status types defined in your system, you may skip this step.

To define project status defaults:

1. Select Set Up Financials/Supply Chain, Product Related, Project Costing, Project Options, Project Status Defaults.

   The Project Status Defaults page appears:



Project Status Defaults page

2. For each processing status, select a default project status.

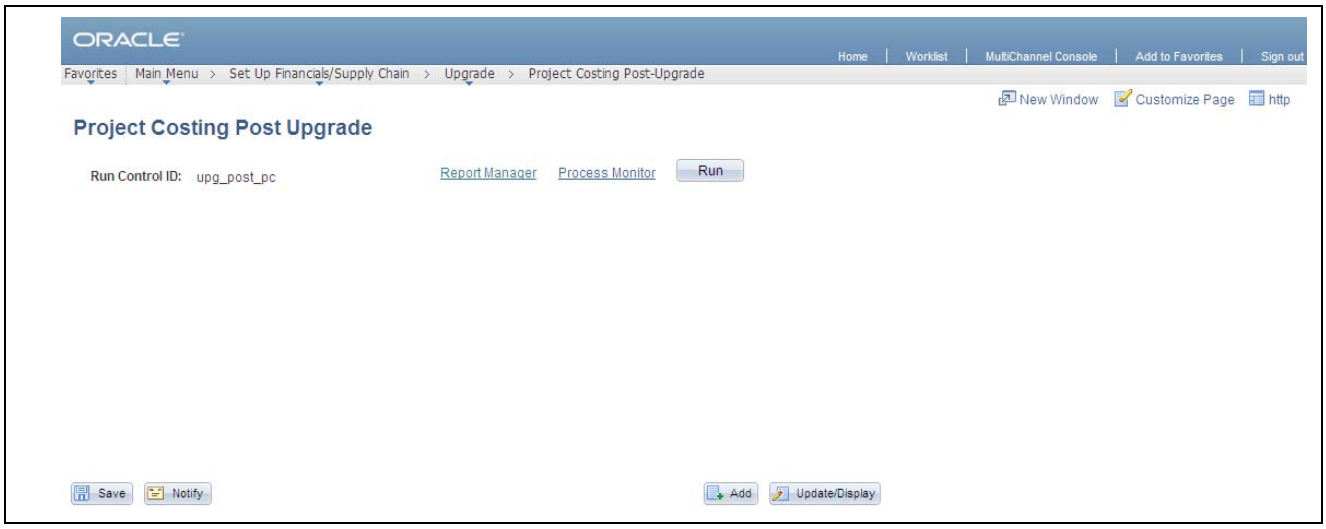
Creating Project Status Based on Project Processing Status

Project status is now required in the PeopleSoft Project Costing process. Therefore, you should create project statuses for all existing projects that do not have a project status. Base the project status on the processing status of the project.

To create project statuses based on project processing status:

1. Select Set Up Financials/Supply Chain, Upgrade, Project Costing Post-Upgrade.

   The Project Costing Post Upgrade page appears:



Project Costing Post Upgrade page

2. Create a new run control.
3. Click Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 6-29-3: Setting Unit of Measure for Hours and Days

In this step, you set the unit of measure for hours and days at the Projects Business Unit level. Several new analytics and reports calculate the number of hours or days within a project. Therefore, you must establish the unit of measure for hours and days. The hours unit of measure (MHR) for each projects business unit is also provided by default during the upgrade process. The days unit of measure (MDY) is also provided by default. If these default settings are correct in your installation, you may skip this step.

If MHR is not the correct unit of measure for hours or MDY is not the correct unit of measure for days, you need to update the Projects Business Unit table using the database query or update tool of your choice. Update the value *xxx* in the UOM_HOURS field and *yyy* in the DAYS_UOM field in the PS_BUS_UNIT_TBL_PC table. *XXX* represents the unit of measure you have defined for hours and *YYY* represents the unit of measure you defined for days.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 6-29-4: Setting Project Calendar

To use the PeopleSoft Program Management scheduling functionality, a Project Calendar must be assigned to all Projects and Project Business Units. The Project Calendar may be any Business Calendar that defines the daily scheduled hours and all holidays. The upgrade process sets the Project Calendar to “01.” If your standard Business Calendar is “01,” then skip this step.

Note. Complete this step only if you license PeopleSoft Projects and PeopleSoft Program Management.

If your standard Business Calendar is not “01,” update the Projects Business Unit Options table and the Projects tables using the database query or update tool of your choice. Use the table information in this table to update your tables and fields:

Table	Field	Value
PS_BUS_UNIT_OPT_PC	HOLIDAY_LIST_ID	‘xxxxxxxxxx’ represents the Business Calendar you have defined for scheduling.
PS_PROJECT	HOLIDAY_LIST_ID	‘xxxxxxxxxx’ represents the Business Calendar you have defined for scheduling.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing Program Management	All	All

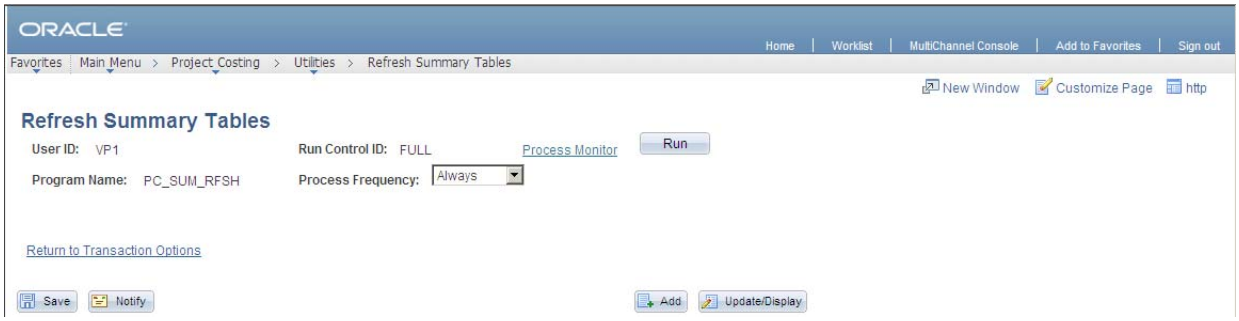
Task 6-29-5: Running Summary Refresh

To clear out any anomalous data that may be present in your system and to make sure the flexible analysis works correctly, you must run a full refresh on the summary tables.

To run summary refresh:

1. Select Project Costing, Utilities, Refresh Summary Tables.
2. Add a new run control ID, or use an existing one.

   This example shows the Refresh Summary Tables page:



Refresh Summary Tables page

3. Click Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 6-29-6: Calculating Team Member Duration

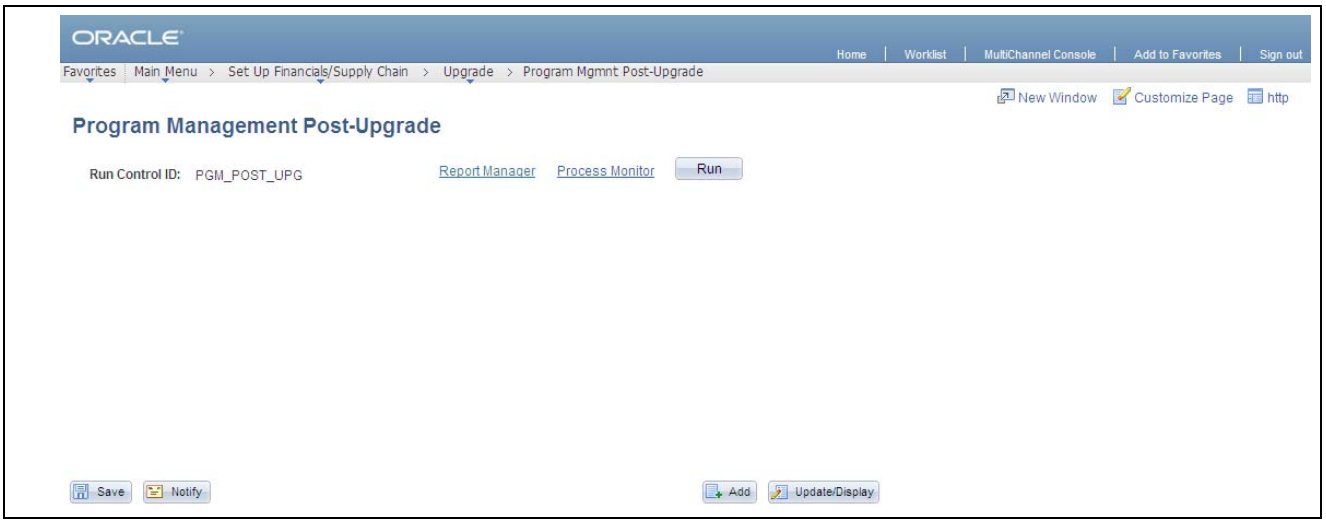
To use the Program Management resource scheduling functionality, the duration of each team member's role on a project must be calculated. This duration is used in the Master Resource Schedule feature. If you are not planning to use resource scheduling, you may skip this step.

Note. Complete this step only if you license PeopleSoft Projects and Program Management.

To calculate team member duration:

1. Select Set Up Financials/Supply Chain, Upgrade, Program Mgmnt Post-Upgrade.

The Program Management Post-Upgrade page appears:



Program Management Post-Upgrade page

2. Add a new run control ID.
3. Click Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing Program Management	All	All

Task 6-29-7: Setting Default Project Manager Role

In this step, you will set the default project manager role at the Project Business Unit Options level. During the upgrade conversion, all existing project business units were updated with the default project manager role: PROJ MANAGER. If this is the appropriate default role for project managers, you may skip this step.

If your installation uses a different role for project managers, you should update each project business unit option with the appropriate default project manager role.

To update the default project manager role:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Options.
2. Update the Project Manager Role field with the appropriate role for your installation.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing Program Management	All	All

Task 6-29-8: Reviewing Rate Template Mapping

In the new release, *Rate Templates* are converted to *Rate Sets.* During this conversion the original Rate Template IDs were either renamed to new Rate Set IDs or split into new Rate Sets, which are then contained in a new Rate Plan. The cross-reference between Rate Templates and Rate Sets/Rate Plans is retained in the UPG_PC_RT_TMP table.

To review rate template mapping:

1. Use the query tool of your choice to display all rows in UPG_PC_RT_TMP table.
2. Use the following table to review the mapping:

Field	Definition
BUSINESS_UNIT	Business Unit
PC_TEMPLATE_ID	Original Rate Template ID
TEMPLATE_TYPE	Rate Template Type
TEMPLATE_ID	New Rate Set ID
RATE_PLAN	New Rate Plan ID

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 6-29-9: Entering the Funds Distribution Threshold Amount

Understanding Threshold Amounts

In PeopleSoft FSCM 9.1, Funds Distribution Rules have an associated threshold amount. The threshold amount on all existing Funds Distribution Rules was set to zero (0) during the upgrade. If your organization uses Funds Distribution, the threshold amount will need to be updated manually to a valid threshold value.

Determining Funds Distribution Rules

To determine whether there are any existing Funds Distribution Rules in your system:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following query:

```
UPG_PCZ01
```


3. If the query returned no rows, you can skip the remainder this step.

   If the query returned rows, complete this step.

Entering the Threshold Amount

For each Funds Distribution Rule returned by the query you just ran in the previous step, you need to enter a threshold amount.

To enter the threshold amount:

1. Select Project Costing, Funds Distribution, Funds Distribution.
2. Access the rule for the business unit, project, and activity from the query.
3. Click the Target Link on the Funds Distribution Source page.

   The Funds Distribution Target page appears.
4. Enter the appropriate threshold amount for the rule.

   Keep in mind that if you already have some distributed amounts against this rule, you want the threshold amount to reflect the remaining threshold for this rule.
5. Repeat steps 2 through 4 for each Funds Distribution Rule returned by the query.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Projects	All	All

Task 6-29-10: Creating a Project Compression Template

Understanding Project Compression Templates

The Project Compression utility has been enhanced in PeopleSoft FSCM 9.1 to allow you to determine the level of compression. This task involves creating a compression template for the level of compression you want to achieve and then updating your project compression run control.

If you have never used the Project Compression utility, you may skip this task.

Creating a New Project Compression Template

To create a new Project Compression template:

1. Select Set Up Financials/Supply Chain, Product Related, Project Costing, General Options, Project Compression Template.
2. Create a new template by selecting the fields that you want to retain after the Project Costing data has been summarized.

Updating Project Compression Run Controls

To update your Project Compression run controls:

1. Select Project Costing, Utilities, Compress Project Data.
2. Select a Project Compression run control.

3. Enter the name of the compression template that you created earlier.

   Compression Template is now a required field on the run control.
4. Save your updated run control.
5. Repeat steps 2 through 4 for each Project Compression run control.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Projects	All	All

Task 6-30: Setting Resource Management

This section discusses:

- Understanding Setting Resource Management
- Loading Holidays

Understanding Setting Resource Management

If you do not license Oracle's PeopleSoft Resource Management, you can skip this task.

Note. To complete this task, you need to use PeopleSoft Pure Internet Architecture. If you do not have your PeopleSoft Pure Internet Architecture environment established for this upgrade pass, the task can be postponed until you have established your PeopleSoft Pure Internet Architecture environment. You will need to complete this task for your functional testing as well as the Move to Production pass.

Task 6-30-1: Loading Holidays

In earlier releases of PeopleSoft Resource Management, when the holidays process ran it created holiday entries in the resource calendar with a TASK_TYPE of *HOLIDAY.* In the new release a new TASK_TYPE of *SCHEDULED_HOLIDAY* has been introduced. You must run the Load Holidays process at the end of the upgrade to properly assign holidays to the correct task category.

This step deletes all calendar entries where the task type is set to *HOLIDAY* for the future date and creates new entries in the calendar with new task type as *SCHEDULED_HOLIDAY.*

To run the Load Holiday process:

1. Select Set Up Financials/Supply Chain, Common Definitions, Resources Data, Load Holidays.
2. Add a new run control ID.
3. Click Save.
4. Click the Run button to access the Process Scheduler Request page.
5. Select the appropriate server name and click OK to run the process.
6. Check the Process Monitor to verify that the process ran to completion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Resource Management	All	All

Task 6-31: Performing Payables Setup

This section discusses:

- Setting Up Match Rules and Rule Control
- Setting Up Document Association Rules
- Setting Definitions Terms and Templates
- Running the Matching Process
- Running Document Tolerance Checking
- Verifying Procurement Withholding ChartFields

Task 6-31-1: Setting Up Match Rules and Rule Control

This section discusses:

- Understanding Setting Up Match Rules and Rule Control
- Adding a New Match Rule Type
- Adding or Updating Match Rules
- Adding or Updating Match Rule Control

Understanding Setting Up Match Rules and Rule Control

If you have added or customized Match Rules, you would have documented your customizations when you executed match rules and transactions.

See “Preparing Your Database for Upgrade,” Executing Payables Transactions.

You must now add your new or customized Match Rules back after data conversion.

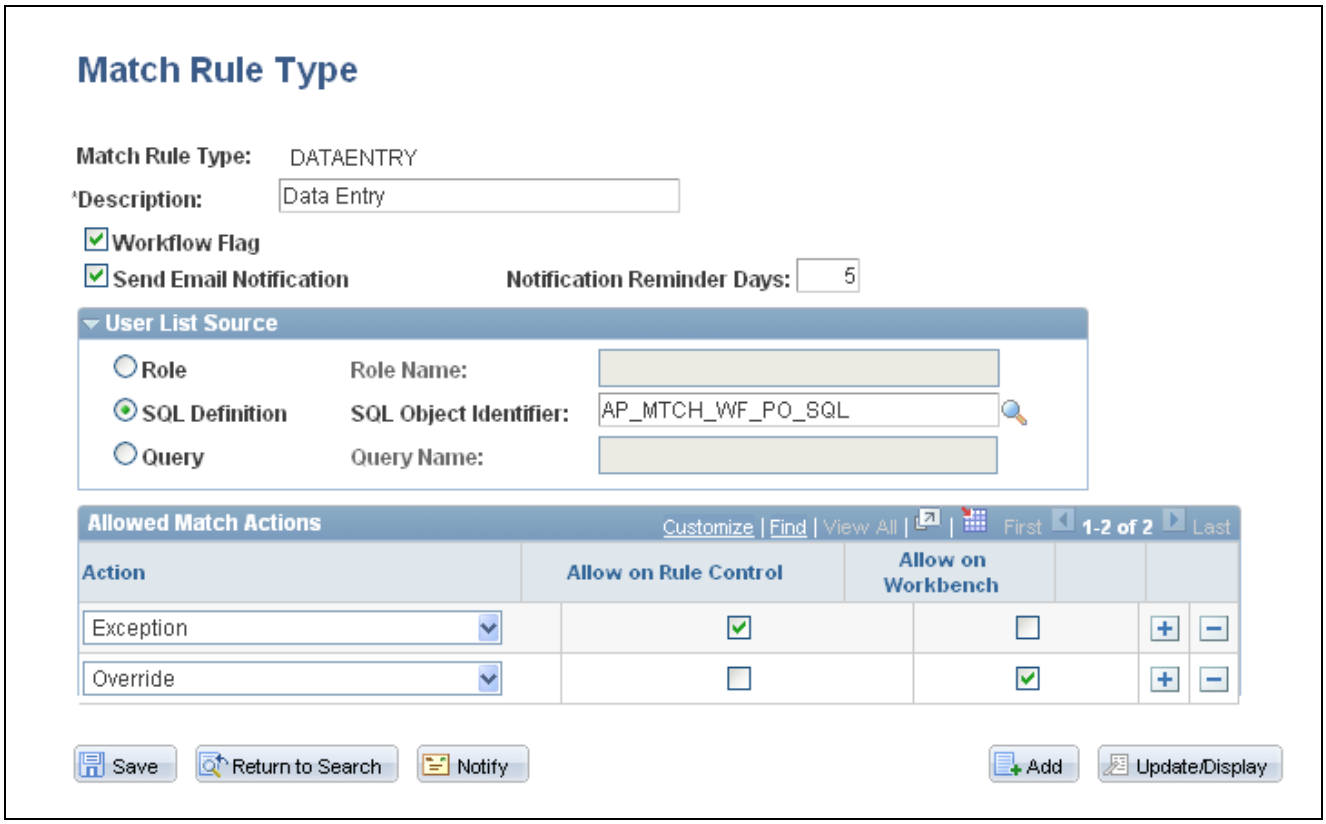
In the current release, the rules have to be tied to a rule type. The delivered rule types are DATA ENTRY, MERCH - QTY, MERCH - UNIT, MERCH - AMT, SUMMARY-GLOBAL, and SYSTEM. If, for your customized rule, none of these rule types is applicable, then you can create a new rule type and tie the customized rule to this new rule type.

Adding a New Match Rule Type

To add a new match rule type:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rule Type.

The Match Rule Type page appears:



Match Rule Type page

2. Enter a description for the new match rule type.

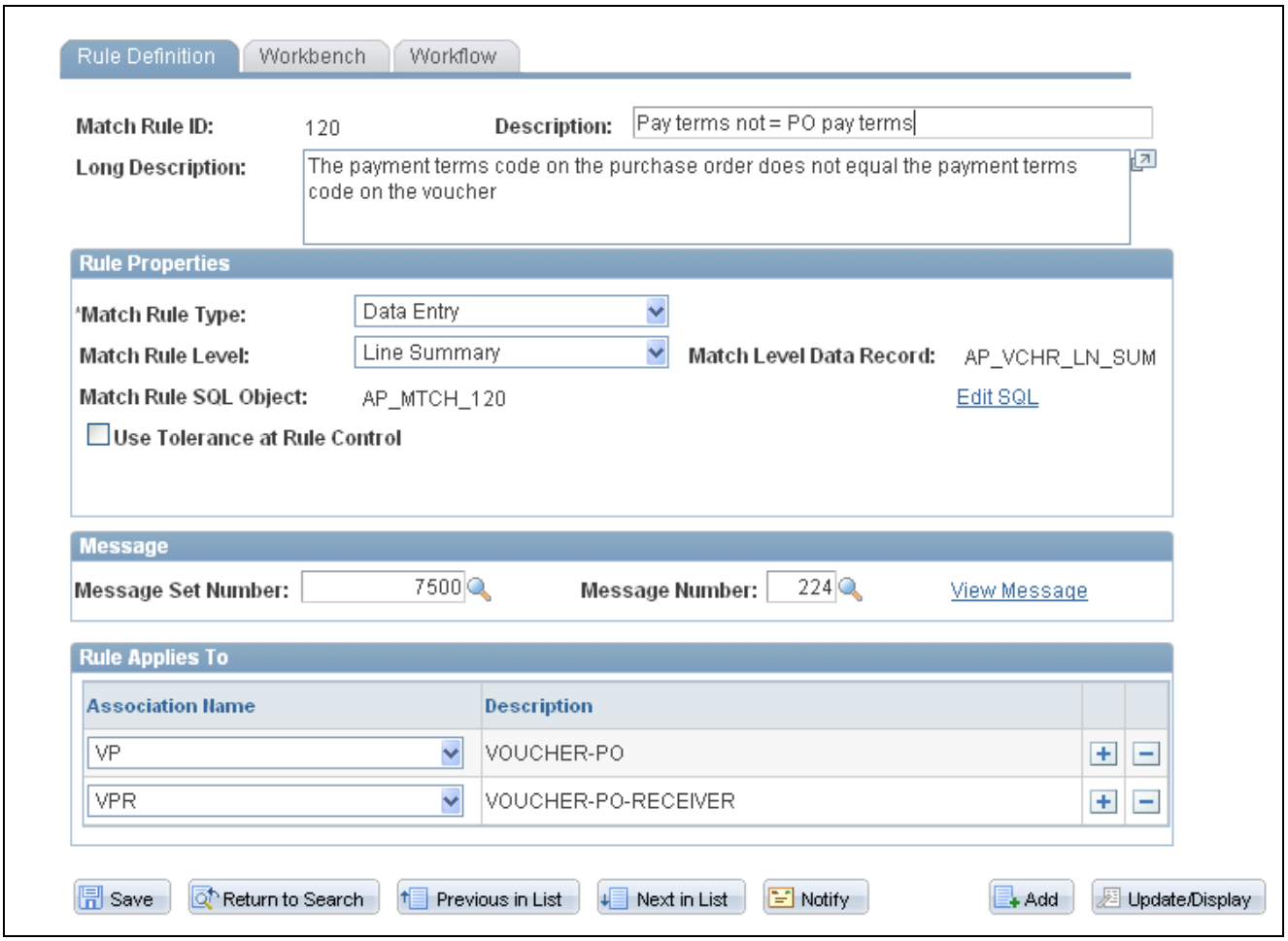
   See PeopleSoft Source To Settle Common Information 9.1 PeopleBook, “Defining Procurement Options,” Establishing Matching and Document Association Options.

Adding or Updating Match Rules

To add or update match rules:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rules.
2. To update an existing match rule ID, enter the match rule ID and click Search.
3. To add a new match rule ID, click Add.

   This example shows the Rule Definition page:



Rule Definition page

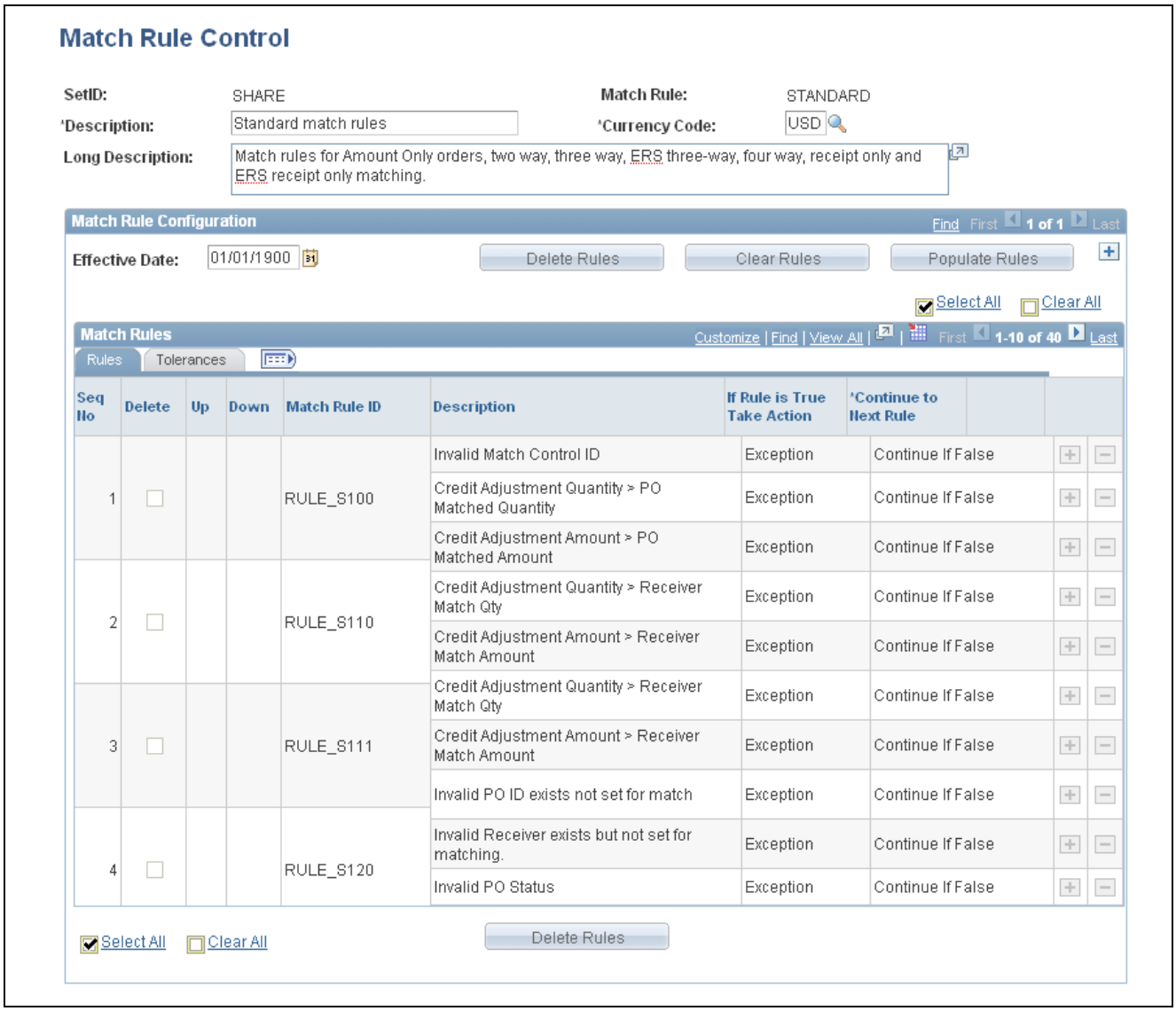
See PeopleSoft Source To Settle Common Information 9.1 PeopleBook, “Defining Procurement Options,” Establishing Matching and Document Association Options.

Adding or Updating Match Rule Control

To add or update Match Rule Control:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rule Control.

   The Match Rule Control page appears:



Match Rule Control page

2. Add or update any customizations that you made to the Match Rule Control.

   See PeopleSoft Source To Settle Common Information 9.1 PeopleBook, “Defining Procurement Options,” Establishing Matching and Document Association Options.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 6-31-2: Setting Up Document Association Rules

This section discusses:

- Adding and Updating Document Association Rules
- Associating a Document Association With a Business Unit
- Configuring Payables Installation Options

Note. Receipt Aware Criteria is renamed in this release to Document Association Rules.

Adding and Updating Document Association Rules

If you have added or customized Receipt Aware Criteria, you would have documented your customizations when you executed match rules and transactions.

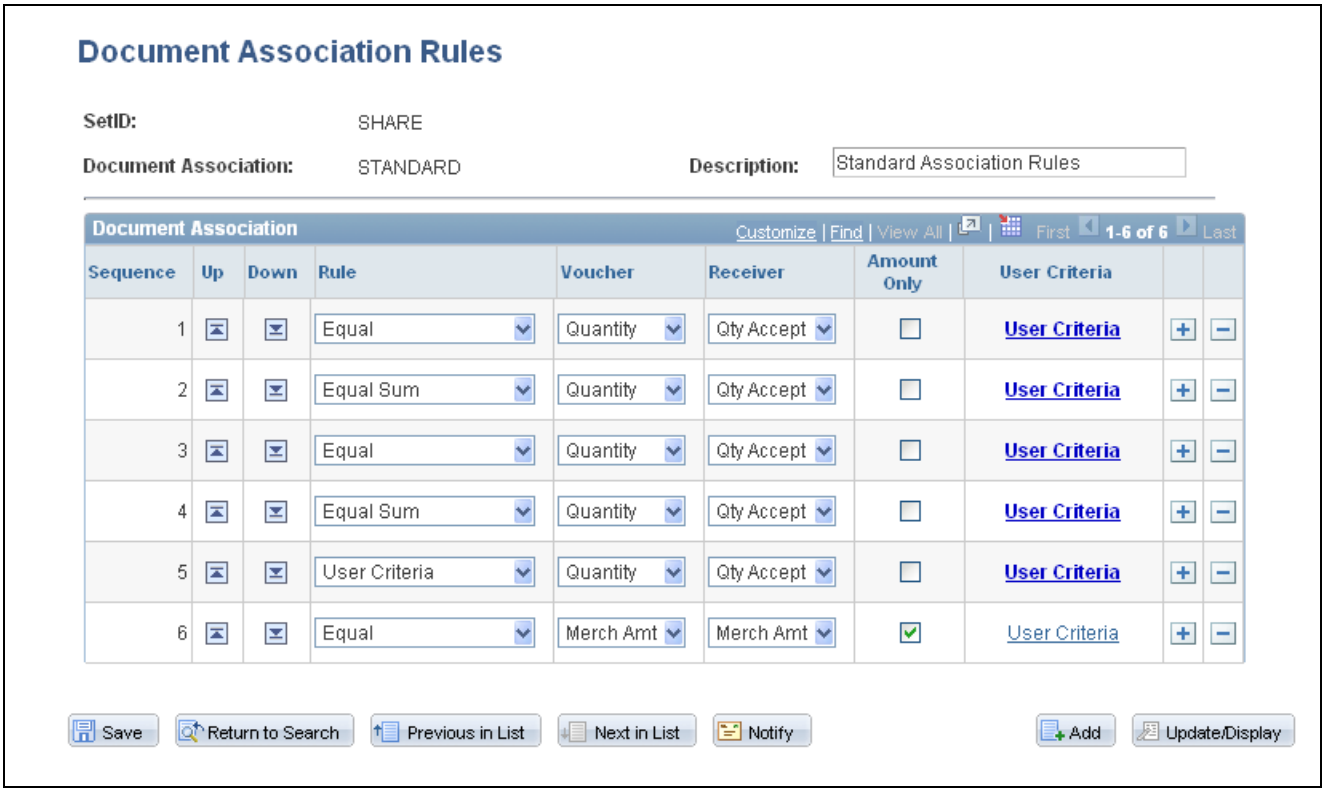
See “Preparing Your Database for Upgrade,” Executing Payables Transactions.

You must now add your new or customized Receipt Aware Criteria back after data conversion.

To add or update document association rules:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Document Association Rules.
2. Enter the setID and document association of the rule you want to update and click Search.
3. Click Add to add a new document association rule.

   The Document Association Rules page appears:



Document Association Rules page

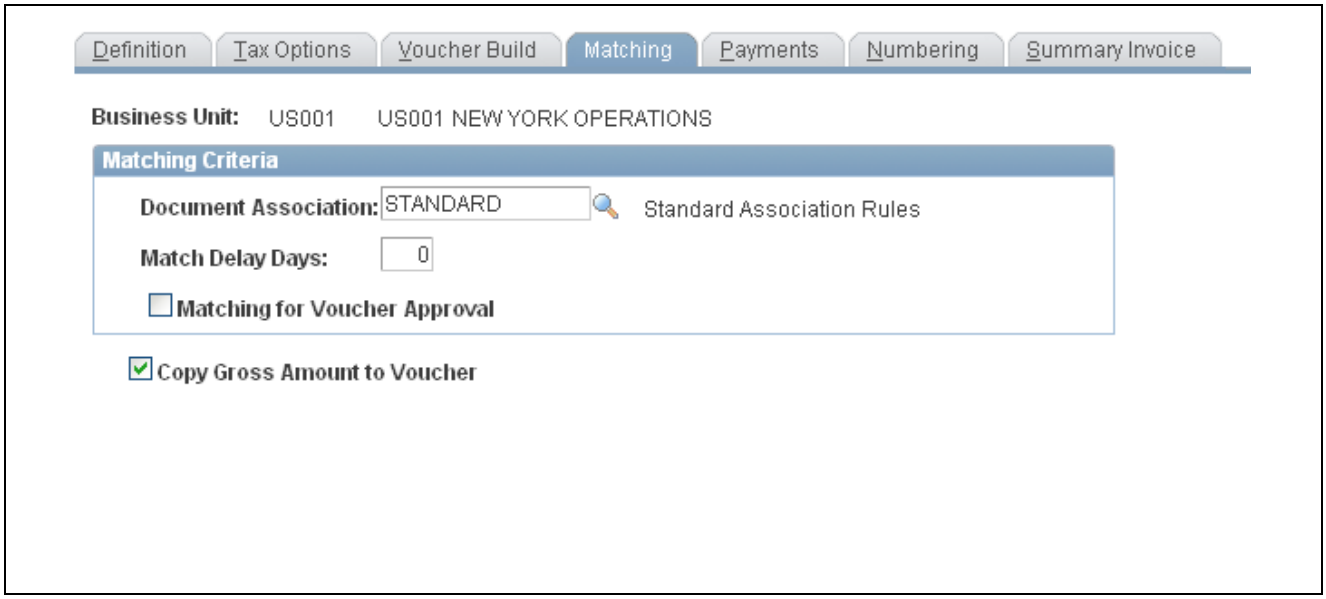
Associating a Document Association With a Business Unit

Once document association rules are established, they have to be tied to the PeopleSoft Payables business unit. This association is critical because if not configured correctly, Document Association (Receipt Association) will not work during matching.

To associate a document association with a business unit:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Payables, Payables Definition.
2. Select the business unit that needs to have a document association and click Search.

   The Matching page appears:



Matching page

3. Select the document association that you want to associate to this business unit.
4. Save the page.

Configuring Payables Installation Options

In this PeopleSoft FSCM release, the system is delivered with three association definitions:

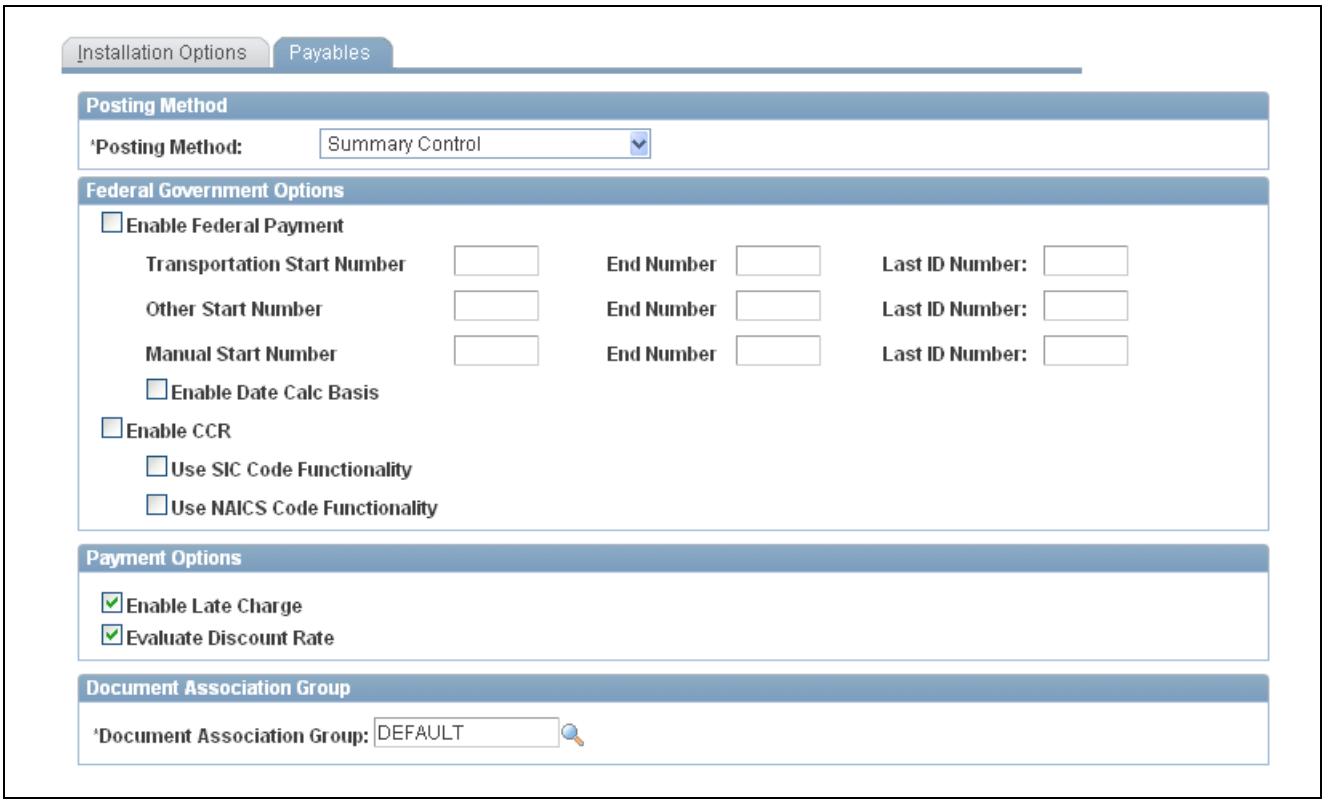
- VPR
- VP
- VR

The name of this delivered group is DEFAULT. You need to attach the *DEFAULT* group to the PeopleSoft Payables installation options. This is important because if not configured at the installation level, matching will occur without applying any rules.

To attach the DEFAULT group to the PeopleSoft Payables installation options:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Select the Payables link.
3. Select the document association group DEFAULT.

   The Payables page appears:



Payables page

4. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 6-31-3: Setting Definitions Terms and Templates

In this step, you set up accounting entry templates, assigning account numbers to all templates.

The following new account types were loaded in as part of the upgrade project:

- AR Rebate Control
- Reconciled Cash Advance
- Tolerance Miscellaneous Charge
- Rebate Agreement

You must assign an account number for each type for *all* of your Accounting Entry templates.

To set up accounting entry templates:

1. If you need to define new accounts, select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values, ChartField Values, Account.

Add your new accounts for each new accounting type: AR Rebate Control, Reconciled Cash Advance, Tolerance Miscellaneous Charge, and Rebate Agreement.

2. To add the accounts to the templates, select Set Up Financials/Supply Chain, Common Definitions, Accounting Entry Template, Templates.
   a. Enter a setID and click Search.
   b. Select an Accounting template.

      The Accounting Entry Template page appears.
   c. Add an account and other ChartField values, if needed, to the new accounting types.

Note. You must make your changes in Correct History mode for the new account types to appear on the page.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 6-31-4: Running the Matching Process

To view the existing vouchers that are currently in *Exception* or *Overridden* status on the Matching Workbench, you need to run the matching process against those vouchers. After you set up the match rules and document association rules, you should run the matching process to pick up all the vouchers that are currently in *Ready, Exception,* or *Overridden* status. After the matching process runs successfully, you can view vouchers on the Matching Workbench component. You must run the matching process for all the business units.

To run the matching process:

1. Select Accounts Payable, Batch Processes, Vouchers, Matching.
2. Add a new run control.
3. Enter a description.
4. Set the Match action to *Matching.*
5. From the Options drop-down list box, select *All Business Units.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 6-31-5: Running Document Tolerance Checking

Review the Document Tolerance definition set on Define Doc Tolerance by selecting Set Up Financials/Supply Chain, Product Related, Procurement Options.

To identify exception vouchers to be processed, select Reporting Tools, Query, Query Manager, and run the following query against your database:

```
UPG_APY02
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 6-31-6: Verifying Procurement Withholding ChartFields

During the upgrade, new setup tables were populated as a result of enhancements to Withholding/1099. The data that was populated came from the Withhold Entity page. You must check the Withholding ChartFields defined under the Procurement Control to ensure that the tableset sharing is the same. If it is not, then you must return to Procurement Control and change the ChartField.

To verify the Withholding ChartFields for a business unit:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Procurement, Procurement Control.
2. Select the business unit.
3. Click Search or Enter.

   The General Controls page appears.
4. Select the Withholding tab.
5. Select the Chartfields link for each entity.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 6-32: Completing Receivables Changes

This section discusses:

- Running the Customer Follow-Up Query
- Adding a Cash Control Journal Generator Template
- Updating Existing Conversations

Note. If you do not have PeopleSoft Receivables, you can skip this task.

Task 6-32-1: Running the Customer Follow-Up Query

The new customer conversation functionality requires you to provide a business unit when creating follow-up letters. In this step, you run a query to determine which operators need to update their existing run controls for conversation follow-up letters. The query should be used to notify users that they should update the run control with the business units that they need to process when creating follow-up letters. As the clean-up effort continues, the query can be run as needed to identify which operators and run controls have not been updated.

To run the UPG_ARU10 query:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following query:

```
UPG_ARU10
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Receivables	All	All

Task 6-32-2: Adding a Cash Control Journal Generator Template

If you are a PeopleSoft Receivables customer running Cash Clearing, a new journal generator template must be created in order to journalize cash clearing entries. For information on how to set up a journal generator template, see the reference below. A cash clearing template for PeopleSoft Receivables is delivered in demo data and can be referred to when setting up the new journal generator template.

See *PeopleSoft Receivables 9.1 PeopleBook.*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Receivables	All	All

Task 6-32-3: Updating Existing Conversations

In the new release, customer conversations have been enhanced to group conversations by business unit. This allows AR Receivable specialists to create follow-up letters by business unit. Earlier in the upgrade, all existing conversations with follow-up letters were created. If there is a need to create a follow-up letter from an existing conversation, a business unit value *must* be populated on the conversation before creating the letter. Online functionality populates the business unit field when it's saved based on the user's default business unit on the User Preferences page. If the user's default business unit is different than the business unit of the customer conversation, you can update the User Preferences page with the correct business unit.

To update the default business unit for an operator:

1. Select Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences.
2. Select the user that will access the conversation.
3. Select the Overall Preferences link.

4. Select the business unit to be populated on the conversation.
5. Save the page.

To update an existing conversation:

1. Select Customers, Conversations, Update Conversations.
2. Select a customer conversation.
3. Change the status to *Open*.
4. Save the page.

Note. In the new PeopleSoft FSCM release, all conversations require a contact ID. Conversations that are updated will require you to select a contact ID for the conversation. Click the Edit Entry button on the Conversation Entries scroll to select a valid contact ID.

5. After the conversation has been updated with the correct business unit, the default business unit on the User Preferences page can be changed back to its original value.
6. If this procedure cannot be implemented, you can update the conversation records with a SQL script.

   For a reference, the following records should be updated with the desired business unit value:

```
CUST_CONVER.BUSINESS_UNIT
CUST_CONVER_LNG.BUSINESS_UNIT
CUST_CONVER_ATT.BUSINESS_UNIT
CUST_CONVER_DTL.BUSINESS_UNIT
CUST_CONVER_HDR.BUSINESS_UNIT
CUS_CNV_HDR_LNG.BUSINESS_UNIT
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Receivables	All	All

Task 6-33: Updating eSettlements

This section discusses:

- Validating Buyer Registration
- Validating Agreement Registration

Task 6-33-1: Validating Buyer Registration

Follow the steps in the procedure below to validate the buyer registration payment method assignment.

To validate the buyer registration payment method assignment:

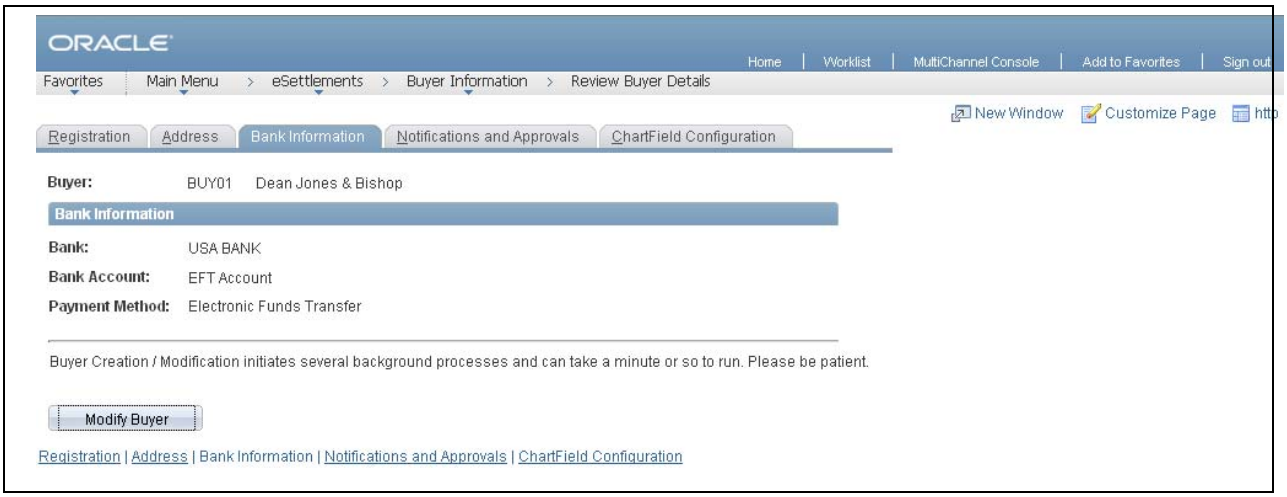
1. Select eSettlements, Buyer Information, Review Buyer Details.

2. Select the buyer that you want to review.
3. Review the bank data on the Bank Information tab and ensure that the payment method is correct.
4. If the payment method of the Bank Information tab needs to be corrected, then in the BSP model, select the correct payment method on the Buyer Information page, Bank Information tab. In the BD model, navigate to the Payables Business Unit Options, for the buyer, and select the correct payment method on the Payment Options page.
5. If the payment method value that you want does not appear in the drop-down list box, then the payment method is not valid for this particular bank account.

   To address this problem, follow these steps:

   a. Go to the bank setup pages and add the desired payment method to the bank account.

   b. Return to the Bank Information tab and assign the new payment method to the buyer.



Buyer Information page: Bank Information tab

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eSettlements	All	All

Task 6-33-2: Validating Agreement Registration

In this step, you review and validate the buyer Agreement Registration payment method assignment.

To validate the Agreement Registration payment method assignment:

1. Select eSettlements, Buyer Information, Review Agreement Details.
2. Select the agreement that you want to review.

   Note. The user profile of your current user ID must have the Buyer Administration Role type assigned to one of its roles and the proper security for all buyers to access agreements.

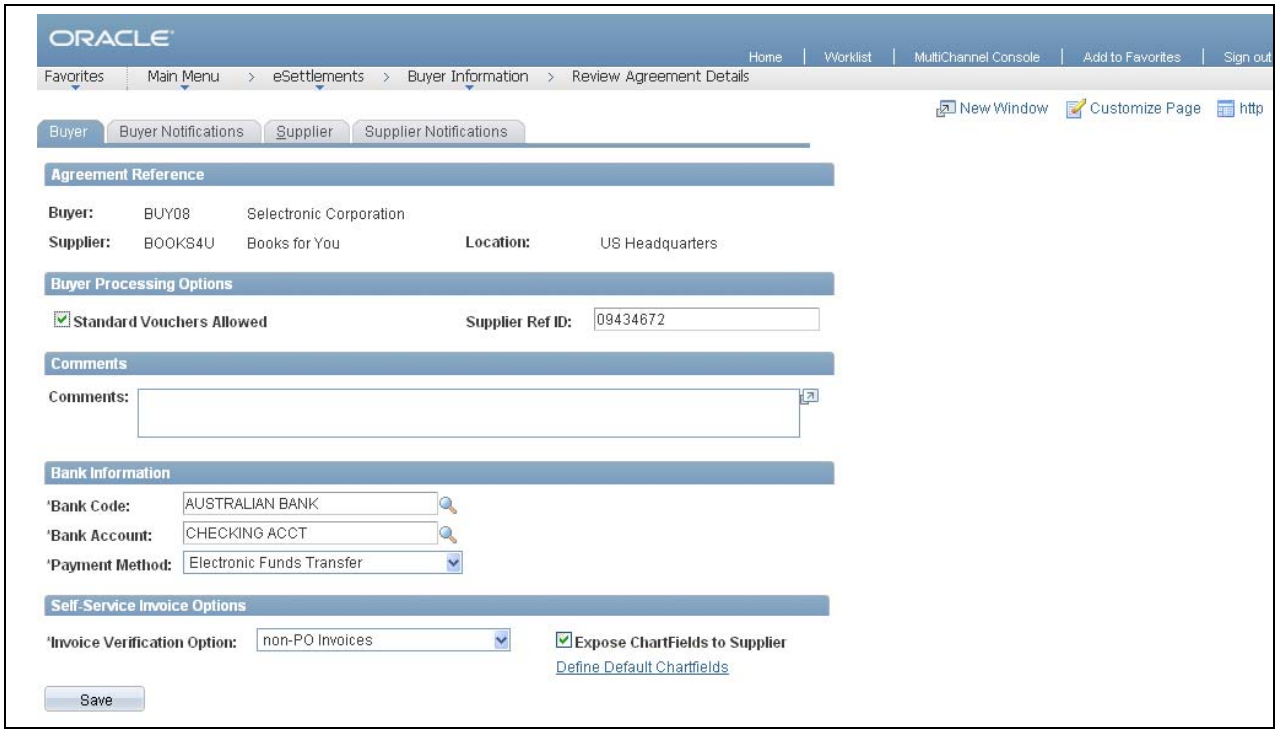
3. Review the bank data on the Buyer tab and ensure that the payment method is correct.
4. If the payment method is not correct, correct the payment method now.

5. If the payment method value that you want does not show up in the drop-down list box, then the payment method is not valid for this particular bank account.

   To address this problem, follow these steps:

   a. Go to the bank setup pages and add the desired payment method to the bank account.

   b. Return to the Buyer tab and assign the new payment method to the buyer.



Buyer Information page: Buyer tab

See Also

PeopleSoft eSettlements 9.1 PeopleBook

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eSettlements	All	All

Task 6-34: Updating the General Ledger

This section discusses:

- Understanding the General Ledger
- Modifying Accounting Entry Definitions
- Setting Up the Adjustment Year

- Setting Up the Adjustment Period Default
- Modifying Adjustment Period Defaults
- Setting Up Adjustment Periods
- Cleaning Up Adjustment Periods
- Defining Closing Process Groups

Understanding the General Ledger

This task assists you in updating PeopleSoft General Ledger. If you have not licensed PeopleSoft General Ledger, you can skip this task.

Task 6-34-1: Modifying Accounting Entry Definitions

This section discusses:

- Understanding Accounting Entry Definitions Modifications
- Identifying Invalid Accounting Entry Definition Field Mappings
- Correcting the Accounting Entry Definition

Understanding Accounting Entry Definitions Modifications

The Accounting Entry Definition maps the subsystem accounting entry table fields to fields on the journal line table. In the new PeopleSoft FSCM release, fields from the subsystem accounting entry table can no longer be larger than the target journal fields.

Identifying Invalid Accounting Entry Definition Field Mappings

Any invalid field mappings must be corrected for Journal Generator to successfully run.

To identify invalid Accounting Entry Definition field mappings:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following queries:

```
Journal Reference Mapping, UPG_GLY01
Journal Description Mapping, UPG_GLY02
Open Item Key Mapping, UPG_GLY03
```

Correcting the Accounting Entry Definition

If any of these queries return records, you need to correct the corresponding accounting entry definitions.

To correct the Accounting Entry Definition:

1. Select General Ledger, Journals, Subsystem Journals, Accounting Entry Definition.
2. Use the output from the above queries to populate the SetID and Accounting Definition Name fields on the search page.
3. Click Search.
4. Correct the invalid field mapping by either removing the mapped entry, selecting another field, or remapping the field.

Note. On the journal line table, Journal Reference field size is 10, Journal Description field size is 30, and Open Item Key field size is 30. The sizes for the mapped fields you use on the Accounting Entry Definitions should be smaller than the fields on the journal lines.

5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-34-2: Setting Up the Adjustment Year

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Fields with No Adjustment Year
- Correcting Fields with No Adjustment Year

Understanding Adjustment Period Modifications

In the new PeopleSoft FSCM release, the adjustment period setup is enhanced to support an adjustment year for each adjustment period. Previously, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Fields with No Adjustment Year

To identify fields with no adjustment year set:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query `No Adjustment Period Default, UPG_GLP01`.

   The query output lists values for the following fields:

   - PeopleSoft Product
   - Business Unit
   - Ledger Group

Correcting Fields with No Adjustment Year

To correct fields with no adjustment year, identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update.
2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.

3. Click Search.
4. Adjustment Year is a required field. Set the adjustment year to an appropriate value for each Adjustment Period entry where the Adjustment Year field value is missing.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 6-34-3: Setting Up the Adjustment Period Default

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Fields with No Adjustment Period Default
- Correcting Fields with No Adjustment Period Default

Understanding Adjustment Period Modifications

In the new PeopleSoft FSCM release, the adjustment period setup was enhanced to support an adjustment year for each adjustment period. Previously, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Fields with No Adjustment Period Default

To identify whether no adjustment period default has been set for a given business unit and ledger group:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query `No Adjustment Period Default, UPG_GLP02`.

   The query output lists values for the following fields:

   - PeopleSoft Product
   - Business Unit
   - Ledger Group

Correcting Fields with No Adjustment Period Default

To correct fields with no adjustment period default, identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update.
2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.
3. Click Search.

4. One Adjustment Period entry must be marked as the default. Select the adjustment period that you want to be the default and select the Default check box.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 6-34-4: Modifying Adjustment Period Defaults

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Multiple Adjustment Period Defaults
- Correcting Multiple Adjustment Period Defaults

Understanding Adjustment Period Modifications

In the new PeopleSoft release, the adjustment period setup was enhanced to support an adjustment year for each adjustment period. Previously, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Multiple Adjustment Period Defaults

To identify where multiple adjustment period defaults exist:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query `Multiple Adj Period Defaults, UPG_GLP03`.

   The query output lists values for the following fields:

   - PeopleSoft Product
   - Business Unit
   - Ledger Group
   - Accounting Period
   - Fiscal Year
   - Default Flag

Correcting Multiple Adjustment Period Defaults

To correct the multiple adjustment period defaults identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update.

2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.
3. Click Search.
4. For each business unit and ledger group, there can be only one adjustment period entry marked as the default. Select the adjustment period that you want to be the default and deselect the remaining entries.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 6-34-5: Setting Up Adjustment Periods

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Open Period Setup with No Adjustment Periods
- Correcting Open Period Setup with No Adjustment Periods

Understanding Adjustment Period Modifications

In the new PeopleSoft FSCM release, the adjustment period setup was enhanced to support an adjustment year for each adjustment period. Previously, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Open Period Setup with No Adjustment Periods

To identify Open Period setup without any adjustment periods:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query `No Adjustment Period Default, UPG_GLP04`.

   The query output lists values for the following fields:

   - PeopleSoft Product
   - Business Unit
   - Ledger Group

Correcting Open Period Setup with No Adjustment Periods

To correct Open Period setup with no adjustment periods, identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Periods Update.

2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.
3. Click Search.

   The Adjustment Period grid will be pre-populated with the adjustment periods that have been defined for the detail calendar that is associated with the business unit and ledger group. The adjustment year will be set for each entry. The adjustment periods will all be closed and no default adjustment period will be set.

   Note. When associating a ledger group with a business unit, a calendar ID is specified. A detail calendar defines the number and duration of accounting periods in a fiscal year. It also identifies the adjustment periods for the calendar.

4. Update the adjustment period entries as needed by updating the adjustment year and open adjustment periods, and setting a default.

   One adjustment period entry must be marked as the default. Select the adjustment period that you want to be the default and check the Default check box.
5. Save the page.

   Note. Even if you make no changes, you must click the Save button in order to save the adjustment period data that has been pre-populated by the system.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 6-34-6: Cleaning Up Adjustment Periods

Understanding Adjustment Period Modifications

In the new PeopleSoft FSCM release, the adjustment period setup was enhanced to support an adjustment year for each adjustment period. Previously, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Adjustment Periods for Cleanup

To identify adjustment periods that need to be cleaned up:

1. Select Set Up Financials/Supply Chain, Upgrade, Adjustment Period Post-Upgrade.
2. The Adjustment Periods grid will be populated with adjustment periods that have no corresponding Open Period setup. These are orphaned rows and they need to be deleted. Analyze the entries and determine which adjustment periods you want to delete.

   Note. If the Adjustment Periods grid has no rows, then there is no data to delete. No further action is required.

Deleting Orphaned Adjustment Periods

To delete the orphaned adjustment periods:

1. Click the Select All icon to select every adjustment period on the list for deletion. Or, you can click the Clear All icon to reverse this action and select rows individually.
2. To delete the selected rows, click the Delete button.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 6-34-7: Defining Closing Process Groups

This section discusses:

- Understanding Closing Process Groups
- Assigning Closing Rules to Closing Process Groups
- Combining Closing Rules in a Closing Process Group

Understanding Closing Process Groups

In the new release, closing process groups were introduced to facilitate closing for some countries that require additional steps and entries. You need to create a closing process group for each closing rule or combination of existing closing rules. If you do not need to combine closing rules, follow the steps in Assigning Closing Rules to Closing Process Groups. If you want to combine closing rules in a process closing group, follow the steps in Combining Closing Rules in a Closing Process Group.

Assigning Closing Rules to Closing Process Groups

To assign closing rules to closing process groups without combining closing rules:

1. Select General Ledger, Close Ledgers, Closing Rules.
2. Select one of your existing closing rules.
3. In the Closing Options tab, click the Create Closing Group link.
4. Enter the closing group name.
5. Repeat steps 1 through 4 until all active closing rules have been assigned to a closing process group.

Combining Closing Rules in a Closing Process Group

To combine closing rules in a process closing group:

1. Select General Ledger, Close Ledgers, Closing Process Group.
2. Add a new closing process group.
3. Enter the closing rules in the Closing Group Steps grid.
4. Repeat steps 1 through 3 until all active closing rules have been assigned to a closing process group.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 6-35: Setting Up Commitment Control

This section discusses:

- Checking Funding Source Allocations
- Setting Up Wait Time for Budget Check

Task 6-35-1: Checking Funding Source Allocations

This section discusses:

- Understanding Duplicate Funding Source Allocation
- Identifying Duplicate Funding Source Allocation
- Correcting Duplicate Funding Source Allocation

Note. Perform this step only if you use Funding Source in Commitment Control and have defined Funding Source allocations.

Understanding Duplicate Funding Source Allocation

A duplicate Funding Source allocation is a Funding Source allocation with duplicate funding source values on the allocation details grid of the Funding Source Allocation page.

In the new PeopleSoft release, the Budget Processor was enhanced to handle the Funding Source distribution. But the Budget Processor will *not* be able to handle the Funding Source distribution based on a duplicate Funding Source allocation. Any duplicate Funding Source allocations have to be corrected to avoid the duplicate funding source values on the details grid. Otherwise, the Budget Processor will terminate abnormally when involved in Funding Source distribution.

Identifying Duplicate Funding Source Allocation

To identify all the duplicate Funding Source allocations:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query `Duplicate Funding Source Alloc, UPG_GLQ01`.

   The query output lists values for the following fields:

   - Business Unit
   - Ledger Group
   - ChartField Value
   - Funding Source

- Duplicate Count

Correcting Duplicate Funding Source Allocation

To correct a duplicate Funding Source allocation identified by the query in the previous step:

1. Select Commitment Control, Define Control Budgets, Funding Source Allocation.
2. Use the output from the query you ran in the previous step to populate the Business Unit, Ledger Group, and ChartField Value fields on the search page.
3. Click Search.
4. Delete the duplicate funding source rows on the details grid, or change the duplicate funding source values to some not-yet-used values for this allocation.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-35-2: Setting Up Wait Time for Budget Check

The On-Line Budget Checking option allows you to specify the maximum time (in minutes) a user would have to wait after running an online budget check.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook* "Setting Installation Options for PeopleSoft Applications"

To set the maximum wait time for the On-Line Budget Checking option:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Select the Commitment Control link.
3. In the On-Line Budget Checking Option area, in the Maximum Wait Time edit box, enter the maximum waiting time.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eProcurement Expenses General Ledger Grants Management Payables Project Costing Purchasing Receivables	All	All

Task 6-36: Completing Asset Management Setup

This section discusses:

- Setting Up Asset Attributes
- Running Asset Attributes

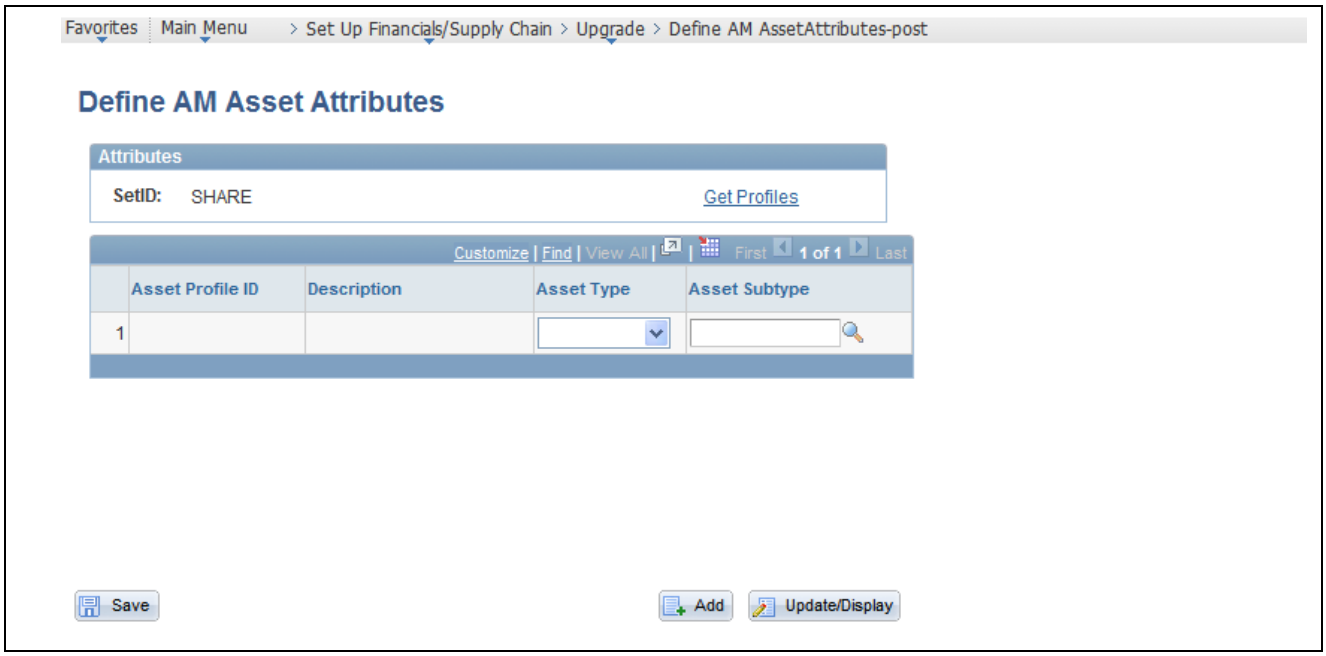
Task 6-36-1: Setting Up Asset Attributes

In this release, Asset Attributes are added to Asset and Profile tables. Asset Type is a required field and this field value must be populated before using the system.

To set up Asset Type and Asset Subtype:

1. Select Set Up Financials/Supply Chain, Upgrade, Define AM Asset Attributes – post.
2. Select the setID that is associated with the profile.

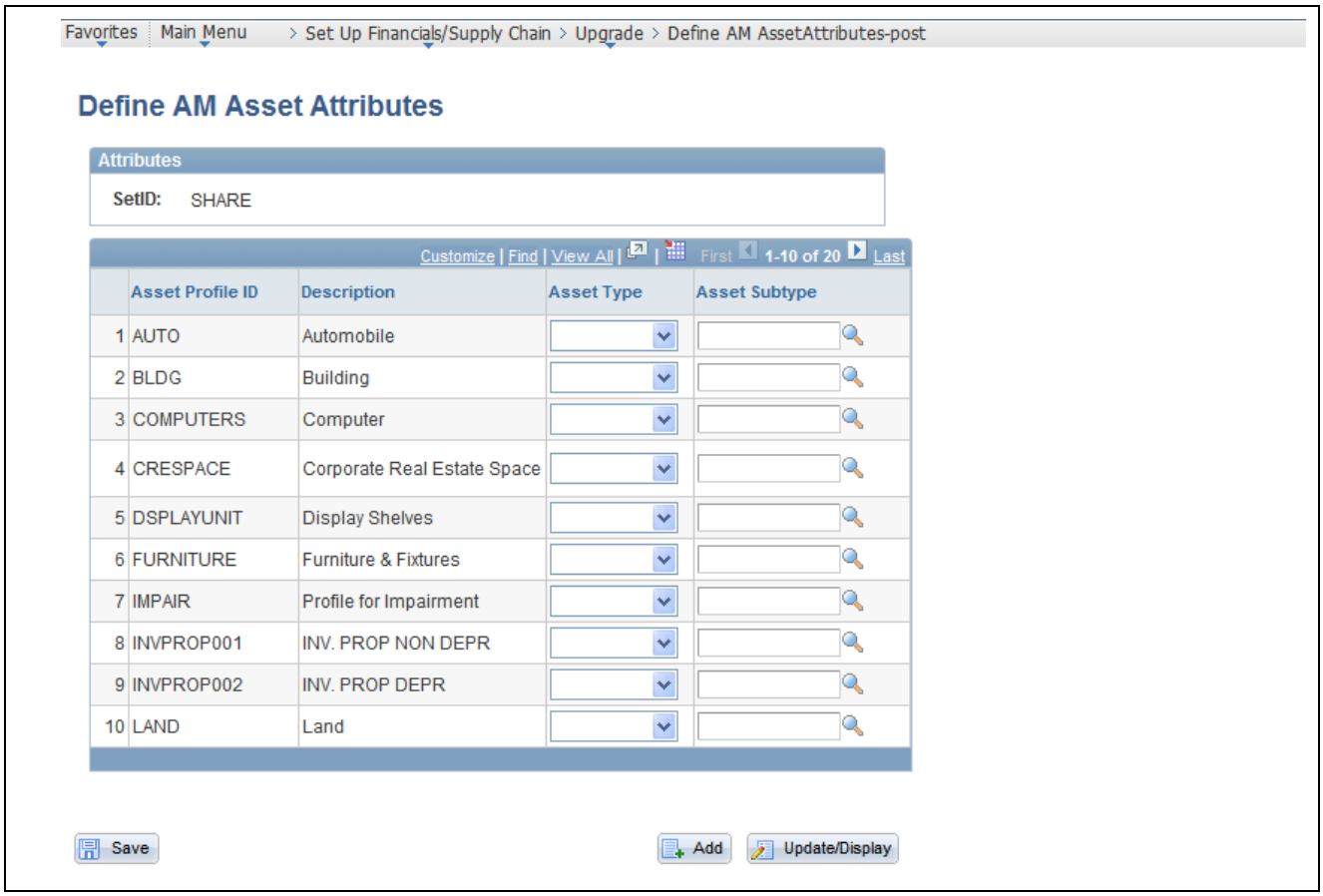
   The Define AM Asset Attributes page appears:



Define AM Asset Attributes page

3. Click the Get Profiles link.

   This populates the grid with all the Asset Profile IDs for the selected setID.



Define AM Asset Attributes page with Profile IDs

4. For each Asset Profile ID, select an appropriate value in the Asset Type and Asset Subtype fields.

   Note. To assign asset subtypes on this page, you need to set them up first. To set up asset subtypes, select Set Up Financials/Supply Chain, Product Related, Asset Management, Physical Definitions, Asset Subtype.

5. Click Save.
6. Repeat steps 2 through 5 for all setIDs.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Asset Management	All	All

Task 6-36-2: Running Asset Attributes

After setting up Asset Attributes for all the profiles, run the Asset Attribute post-upgrade Application Engine program UPG_AM_PSP10. This populates the Asset and Profile tables with Asset Attribute data. Asset type will be populated to Others for the non-profile assets.

This Application Engine program also populates the tables ASSET, BOOK, BUS_UNIT_TBL_AM, BU_BOOK_TBL, and ASSET_WARRANTY with the record default values for the new fields.

To run this Application Engine program, select Set Up Financials/Supply Chain, Upgrade, Run AM Asset Attribute-post.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Asset Management	All	All

Task 6-37: Completing Contracts Setup

This section discusses:

- Understanding Completing Contracts Setup
- Updating Limits Totals
- Running the Limit Amount Report
- Setting Up Billing Summarization
- Reviewing Contracts Rate Plans

Understanding Completing Contracts Setup

In this task, you complete the setup for Oracle's PeopleSoft Contracts. This involves updating limit totals, running the limit amount report, setting up billing summarization, and attaching rated plans.

See *PeopleSoft Contracts 9.1 PeopleBook.*

Task 6-37-1: Updating Limits Totals

For all existing contract lines with a limit amount greater than zero, the limit amount has been moved from the Limit Amount field on the contract detail line (CA_DETAIL.LIMIT_AMOUNT) to the Funded / Billing Limit amount field on the new contract limit and fee detail line table (CA_LMT_FEE_DTL.LIMIT_AMT_BIL). Additional information that will now be tracked on the contract limit and fee detail line includes the total amount processed against the limit and the total amount that is in excess of the limit, as well as various dates such as the date on which the limits process was last run and the date on which the limit was reached.

In order to ensure that all fields on the new rows in the contract limit and fee detail line are updated correctly, you must run the new Limits process, specifying the *Recalculate Totals Only* option.

To update Limits totals:

1. Select Customer Contracts, Update Contract Progress, Process Limits.
2. Enter a run control ID.
3. Select the *Recalculate Totals Only* and *Process Billing* options.

   Note. The Process Billing option will be available based on whether you have selected to separate Billing and Revenue. The option to separate Billing and Revenue is found by selecting Set Up Financials/Supply Chain, Install, Installation Options, Contracts. You can select or deselect the Separate Billing and Revenue option in the Other Installed Options group box.

4. Specify additional selection criteria as needed, and click Run.
5. Specify the server, and then click OK.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 6-37-2: Running the Limit Amount Report

After updating the Limits totals, you should now run the Limit Amount report to ensure that your limits have been converted and updated correctly. To run the report, select Customer Contracts, Reports, Limit Amount. Note that the selection criteria for the Limit Amount report have changed for the new PeopleSoft release. This includes the ability to specify whether the report should be run to allow only transactions with an excess to be reported or to allow only transactions with a remaining amount to be reported.

If you select *remaining amount*, you must then specify the maximum remaining percent, which allows only transactions that are within a certain percentage of reaching the limit to be reported. This option is essentially replacing the *%of Limit Already Billed* option. However, because of the addition of the *Report By* option, it does not make sense to upgrade the existing percentage field to the new maximum percentage field.

Because of this, you should review all the new selection criteria prior to running the new limits report for the first time.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Contracts	All	All

Task 6-37-3: Setting Up Billing Summarization

You may have some Amount-based Contract lines for which you deleted the summarized Bill Plan lines and replaced them with individual Bill Plan lines in the chapter "Preparing Your Database for Upgrade," Processing Bill Plans task.

Note. If you do not want to set up summarization for the Contract lines for which you deleted summarized Bill Plan lines in the chapter "Preparing Your Database for Upgrade," Processing Bill Plans task, or you did not have any Contract lines that required summarized Bill Plan lines to be deleted, you can skip this step.

To set up Bill Plans for summarization:

1. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Configuration ID.
2. Define summarization IDs.

   Note. SUM_GROUP_ID, SUM_GROUP_TYPE, SUM_TEMPLATE_ID must be defined on any summarization IDs that will be used on Fixed Fee Bill Plans (Milestone, Immediate, Percent Complete).

   ---

3. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Group.
4. Define summarization group types and identifiers.
5. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Template, General Definitions.
6. Define summarization templates.
7. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Template, Group Header.
8. Define summarization group headers.
9. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Template, Group Detail.
10. Define summarization group detail.
11. Select Customer Contracts, Review Billing, Plans.
12. Open the appropriate Bill Plans and assign summarization templates to the Bill Plan lines.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 6-37-4: Reviewing Contracts Rate Plans

In the new PeopleSoft release, Contract Header Burden Plans are converted into rate plans. If there is a contract line rate template and more than one applicable burden plan for that contract line, then all rate information was removed from the contract line during the upgrade. Because it was not possible to know which of the possible burden plans should be combined with the rate template to create a new rate plan, all rate information was removed from these contract lines so that further analysis could be performed. This situation would occur if there is more than one activity linked to a contract line and each activity had a different burden plan prior to conversion, or more than one project is linked to a contract line and each project had a different burden plan (with no activity level burden plans). You can review the list of contract lines that meet this criteria in the record UPG_PC_CONT_TMP, which was populated during the conversion.

To review the list of contract lines that meet this criteria:

1. Use the query tool of your choice to display all rows on UPG_PC_CONT_TMP.
2. Use the table below to review the list:

Field	Definition
CONTRACT_NUM	Contract Number
CONTRACT_LINE_NUM	Contract Line Number

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Contracts	All	All

Task 6-38: Completing Expenses Setup

This section discusses:

- Understanding Completing Expenses Setup
- Setting Up Employee Privilege Templates
- Attaching Employee Privilege Templates

Understanding Completing Expenses Setup

In this task, you complete the setup for Oracle's PeopleSoft Expenses using the results of the queries UPG_EXZ01 and UPG_EXZ02 that you ran before you began the upgrade in the chapter "Preparing Your Database for Upgrade," Preparing Expenses task. Now that the upgrade is complete, you set up employee privilege templates for each expense transaction type and then associate the templates with either business units or roles.

Task 6-38-1: Setting Up Employee Privilege Templates

This section discusses:

- Understanding Employee Privilege Template Setup
- Setting Up the Templates to Allow Updates
- Setting Up the Templates for View
- Setting Up Templates for Hide

Understanding Employee Privilege Template Setup

You need to set up employee privilege templates for each expense transaction according to the type of accounting display that was set up. The three options for accounting display in previous releases were Update, Display Only, and Hide.

Note. If the accounting display field was updated and you do not want to make any changes to it, then you do not need to set up employee privilege templates. The system, as delivered, will default to users having the ability to access and update accounting information on the expense transactions.

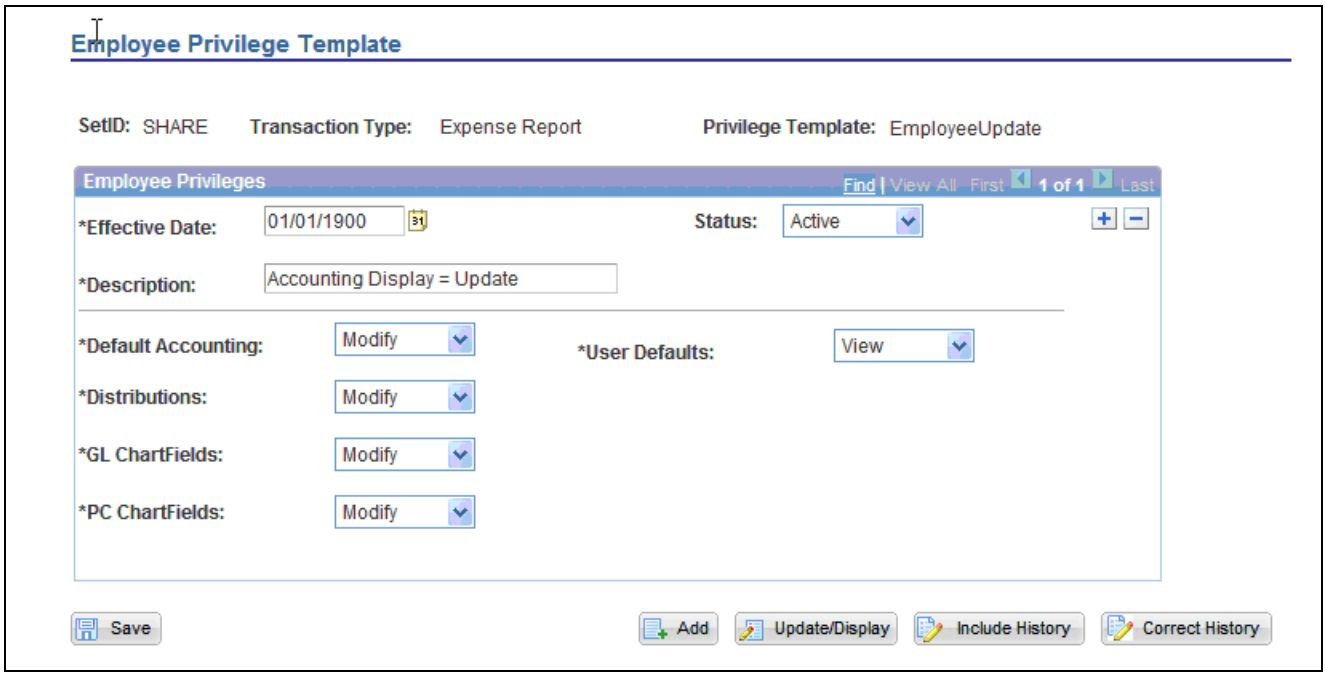
For more complete information on setting up employee privilege templates, refer to *PeopleSoft 9.1 Expenses PeopleBook*, "Maintaining Employee Profiles," Maintaining Employee Privilege Templates.

Setting Up the Templates to Allow Updates

To set up the templates to allow updates to the accounting display:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Employee Privilege Template.
2. Select the transaction type Expense Report.
3. Set the Default Accounting, Distributions, GL ChartFields, and PC ChartFields fields to *Modify* and click Save.

   The following example shows the Employee Privilege Template page.



Employee Privilege Template: Accounting Display=Update

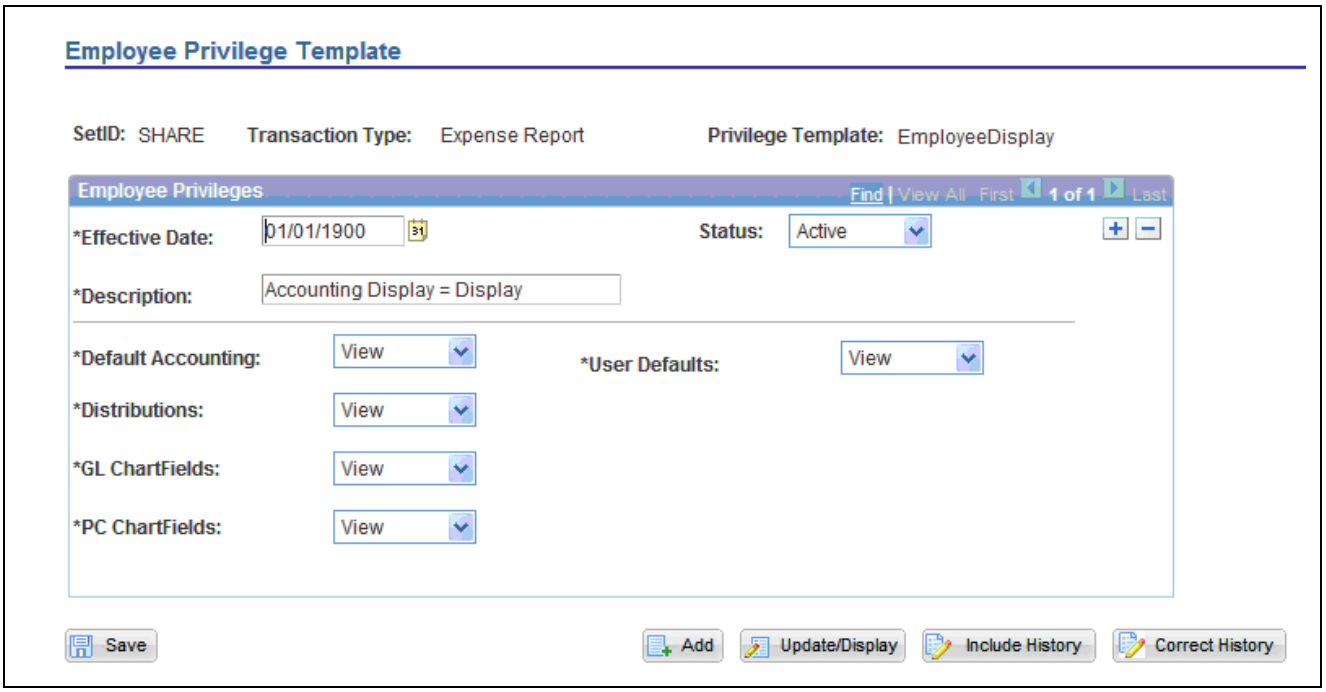
4. Repeat steps 1 through 3 to create privilege templates for the Travel Authorization and Time Report transaction types.

Setting Up the Templates for View

To set up the templates for viewing the accounting display:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Employee Privilege Template.
2. Select the transaction type Expense Report.
3. Set the Default Accounting, Distributions, GL ChartFields, and PC ChartFields fields to *View* and click Save.

   The following example shows the Employee Privilege Template page.



Employee Privilege Template: Accounting Display=Display

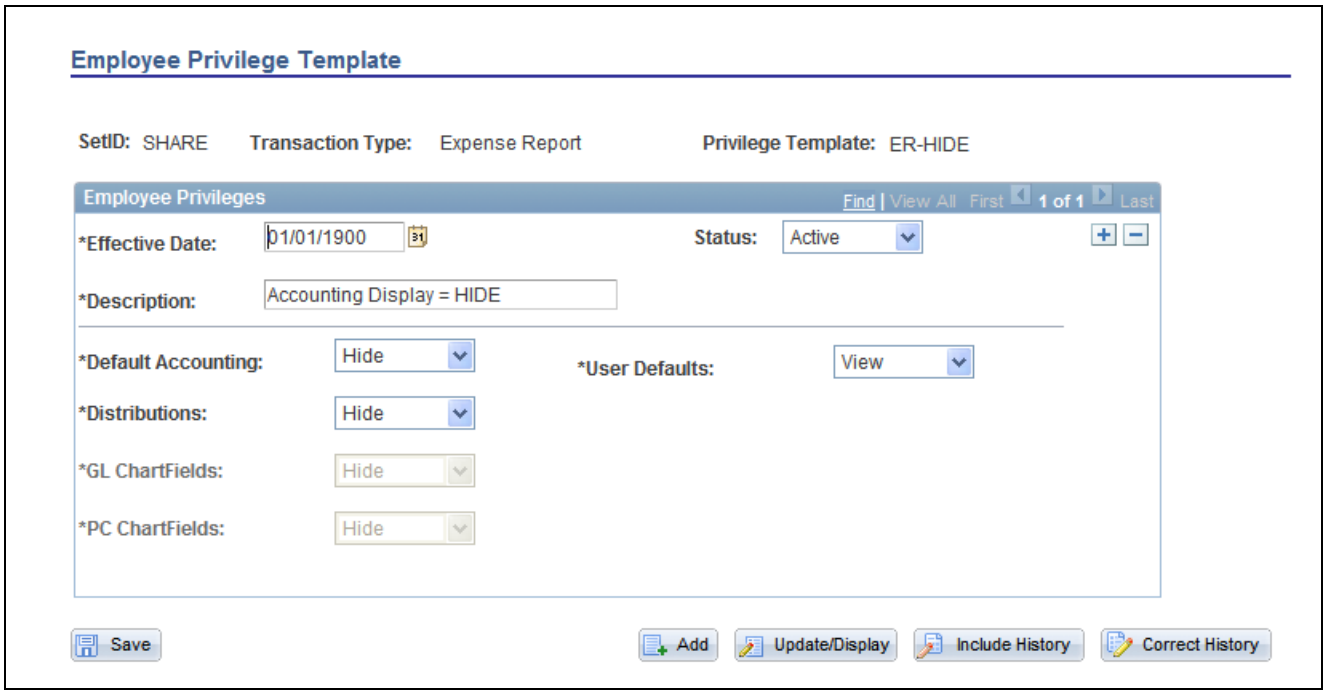
4. Repeat steps 1 through 3 to create privilege templates for the Travel Authorization and Time Report transaction types.

Setting Up Templates for Hide

To set up the templates to hide the accounting display:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Employee Privilege Template.
2. Select the transaction type Expense Report.
3. Set the Default Accounting and Distributions fields to *Hide* and click Save.

   The following example shows the Employee Privilege Template page.



Employee Privilege Template: Accounting Display=Hide

4. Repeat steps 1 through 3 to create privilege templates for the Travel Authorization and Time Report transaction types.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Expenses	All	All

Task 6-38-2: Attaching Employee Privilege Templates

This section discusses:

- Understanding Attaching Employee Privilege Templates
- Attaching a Privilege Template to a Business Unit
- Attaching a Privilege Template to a Role

Understanding Attaching Employee Privilege Templates

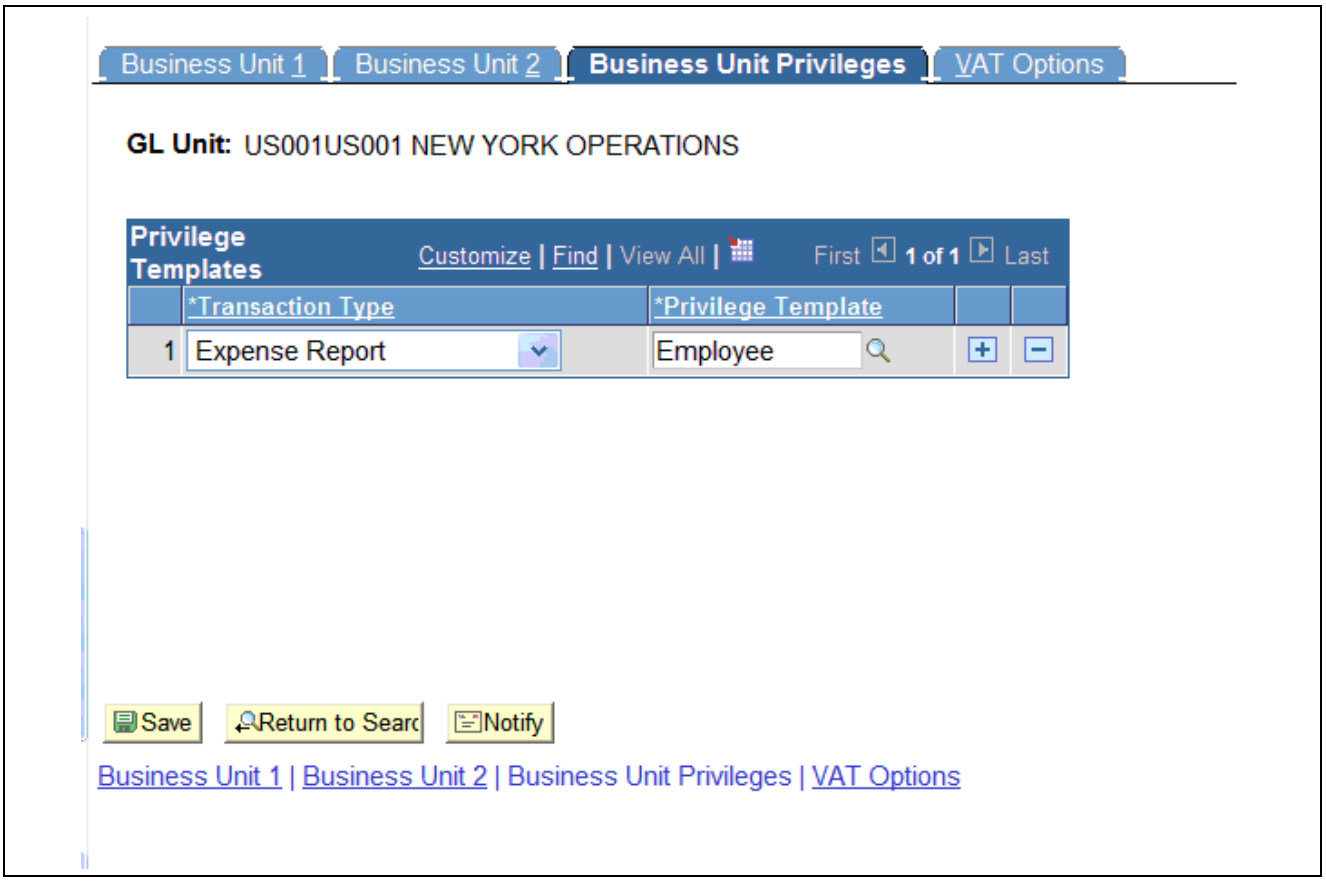
You associate the employee privilege templates with a business unit or role, depending on how the accounting display was set up previously. If the accounting display was set at the business unit level, then update the Expenses business unit to point to the new employee privilege template on the Business Unit Privileges tab on the Business Unit Definition page. If the accounting display was set at the Expenses role, then update the Expenses role to point to the new employee privilege template.

Attaching a Privilege Template to a Business Unit

To attach a privilege template to a business unit:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Expenses, Expenses Definition.

2. Select a relevant business unit.
3. On the Business Unit Privileges tab, for each transaction type (Expense Report, Travel Authorization, and Time Report) select a privilege template and click Save to attach it to the business unit.



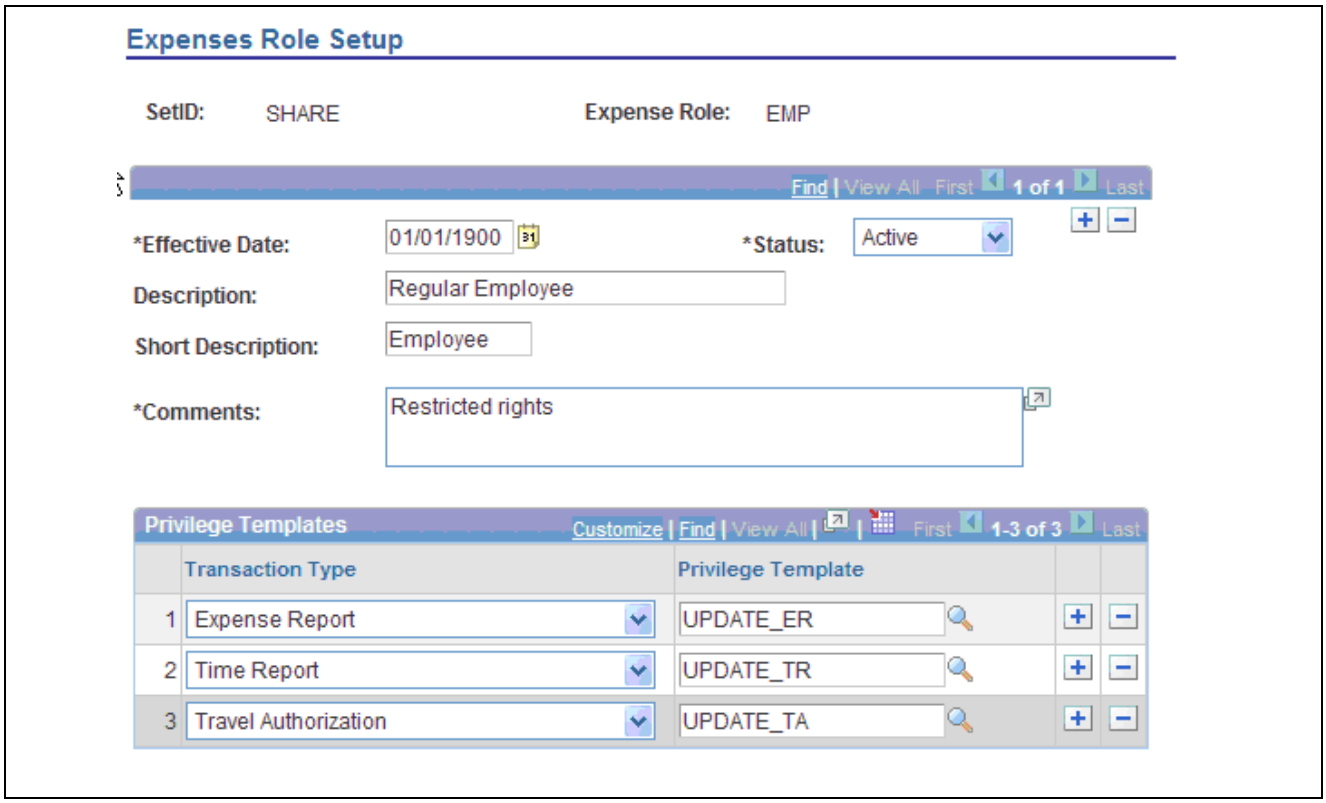
Business Unit Privileges tab

4. Repeat steps 2 and 3 for each relevant business unit.

Attaching a Privilege Template to a Role

To attach a privilege template to a role:

1. Select Set Up Financials/Supply Chain, Product Related, Expenses, Management, Expense Role.
2. Select a relevant Expense role.
3. On the Expense Role Setup page, for each transaction type (Expense Report, Travel Authorization, and Time Report) select a privilege template and click Save to attach it to the role.



Expenses Role Setup page

4. Repeat steps 2 and 3 for each relevant role.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Expenses	All	All

Task 6-39: Setting VAT Processing

This section discusses:

- Updating VAT Defaults
- Updating VAT Entity Report Options

Task 6-39-1: Updating VAT Defaults

In the new PeopleSoft release, a new declaration point, Declaration at Accounting Date, has been added. You may specify this new declaration point as the default for both goods and services throughout the VAT defaulting hierarchy. You may also specify that VAT be recorded on advance payments when the declaration point for the advanced payment is accounting date.

To update VAT defaults:

1. Select Set Up Financials/Supply Chain, Common Definitions, VAT and Intrastat, Value Added Tax, VAT Defaults.
2. Select the VAT Driver value *VAT Entity Registration*.
3. For each VAT Entity, for each country, complete the following steps:
   a. Select the *VAT on Adv Pay — Acctg in AP* check box if you want VAT to be recorded on advance payments in Accounts Payable when the declaration point for the advance payments is set to At Accounting Date.
   b. Deselect the *VAT on Adv Pay — Acctg in AP* check box if you do NOT want VAT to be recorded on advance payments in Accounts Payable when the declaration point for the advance payments is set to At Accounting Date.
   c. Select the *VAT on Adv Pay — Acctg in AR* check box if you want VAT to be recorded on advance payments in Accounts Receivable when the declaration point for the advance payments is set to At Accounting Date.
   d. Deselect the *VAT on Adv Pay — Acctg in AR* check box if you want VAT to be recorded on advance payments in Accounts Receivable when the declaration point for the advance payment is set to At Accounting Date.
4. Return to the search page for VAT defaults.
5. For each of the following VAT drivers, for each country, set the default VAT Declaration Point for Goods to *At Accounting Date* (optional):
   - VAT Entity Registration
   - Order Management Business Unit
   - Billing Business Unit
   - Receivables Options
   - Asset Management Business Unit
   - Purchasing Options
   - Payables Options
   - Customer
   - Customer Location
   - Vendor
   - Vendor Location
   - Bill Source
   - Bill Type
   - Voucher Origin
   - Control Group
6. For each of the following VAT drivers, for each country, set the default VAT Declaration Point for Services to *At Accounting Date* (optional):
   - VAT Entity Registration
   - Order Management Business Unit
   - Receivables Options
   - Purchasing Options

- Payables Options
- Customer
- Customer Location
- Vendor
- Vendor Location
- Bill Source
- Bill Type
- Voucher Origin
- Control Group

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-39-2: Updating VAT Entity Report Options

In the new PeopleSoft release, a new VAT Transaction report has been added which assists in reconciling and auditing your VAT return. This report is based on the existing VAT report definitions and is run from the existing VAT Return and Report run control component. However, before you can run this report for any given VAT Entity, you must link the report to the VAT Entity.

To link the VAT report to the VAT entity:

1. Select Set Up Financials/Supply Chain, Common Definitions, VAT and Intrastat, Value Added Tax, VAT Entity.
2. For each VAT Entity, for each registration country, complete the following:
   a. Select the VAT Report Details link.
   b. Within the VAT Reports scroll area, click on the plus button to add a new row.
   c. For the new row, select *Application Engine* for Process Type.
   d. Select *LC_RPT_VAT* for the process name.
   e. Click OK to return to the main VAT Entity page.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-40: Reviewing Inventory Policy Planning

This section discusses:

- Understanding Reviewing Inventory Policy Planning
- Reviewing the Define Policy Sets Page
- Reviewing the Policy Items Page
- Reviewing the Define Cost Summary Groups Page
- Reviewing the Define Publish Specification Page
- Reviewing the Published Policy Details Page
- Reviewing the Delete Policy Items Page
- Reviewing Work Queue Messages

Understanding Reviewing Inventory Policy Planning

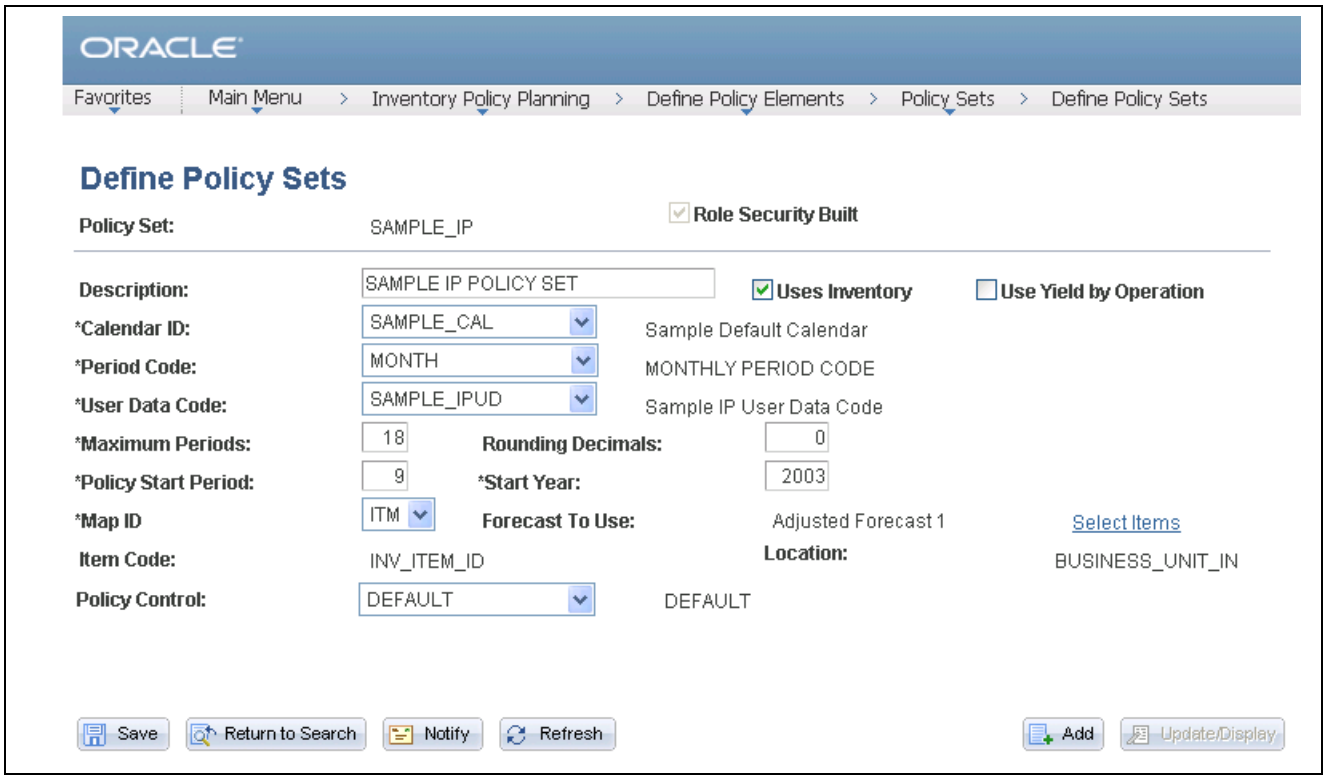
In the PeopleSoft FSCM 9.1 release, changes have been made to PeopleSoft Inventory Policy Planning. The pages Define Policy Sets, Review Policy Items, Define Cost Summary Groups, Define Publish Specification, Published Policy Details, Delete Policy Items, and Work Queue Message have been modified because Oracle's PeopleSoft Demand Planning has been replaced by integration with Oracle's Demantra Demand Management.

Task 6-40-1: Reviewing the Define Policy Sets Page

In this step, you review the Define Policy Sets page.

To review the page:

1. Select Inventory Policy Planning, Define Policy Elements, Policy Sets, Define Policy Sets.
2. Select a policy set and verify that the Variance Law Periods field and the DP Interface tab have been removed from the Define Policy Sets page.



Define Policy Sets page

3. Note that the Select Forecast Items link that used to appear on the DP Interface tab has been transferred to the Define Policy Sets page, and the link has been renamed Select Items.

   The existing selection criteria were not upgraded since the available field names have changed. Enter selection criteria based on the new fields. Check the selection criteria for all the policy sets, if applicable.

4. The policy sets have been linked to a map ID that will determine the values for the Item Code and Location fields, which are now display only. The map ID default value is *ITM*. Oracle recommends that you become familiar with the integration to Demantra Demand Management and determine whether the default map ID meets your requirements. If not, then create a new map ID and set the policy set to the new map ID. For details on how to create Map IDs, see *PeopleSoft Supply Chain Management Integration 9.1 PeopleBook*.

5. Note that the Forecast to Use field default value is *Adjusted Forecast 1* and it is display only.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

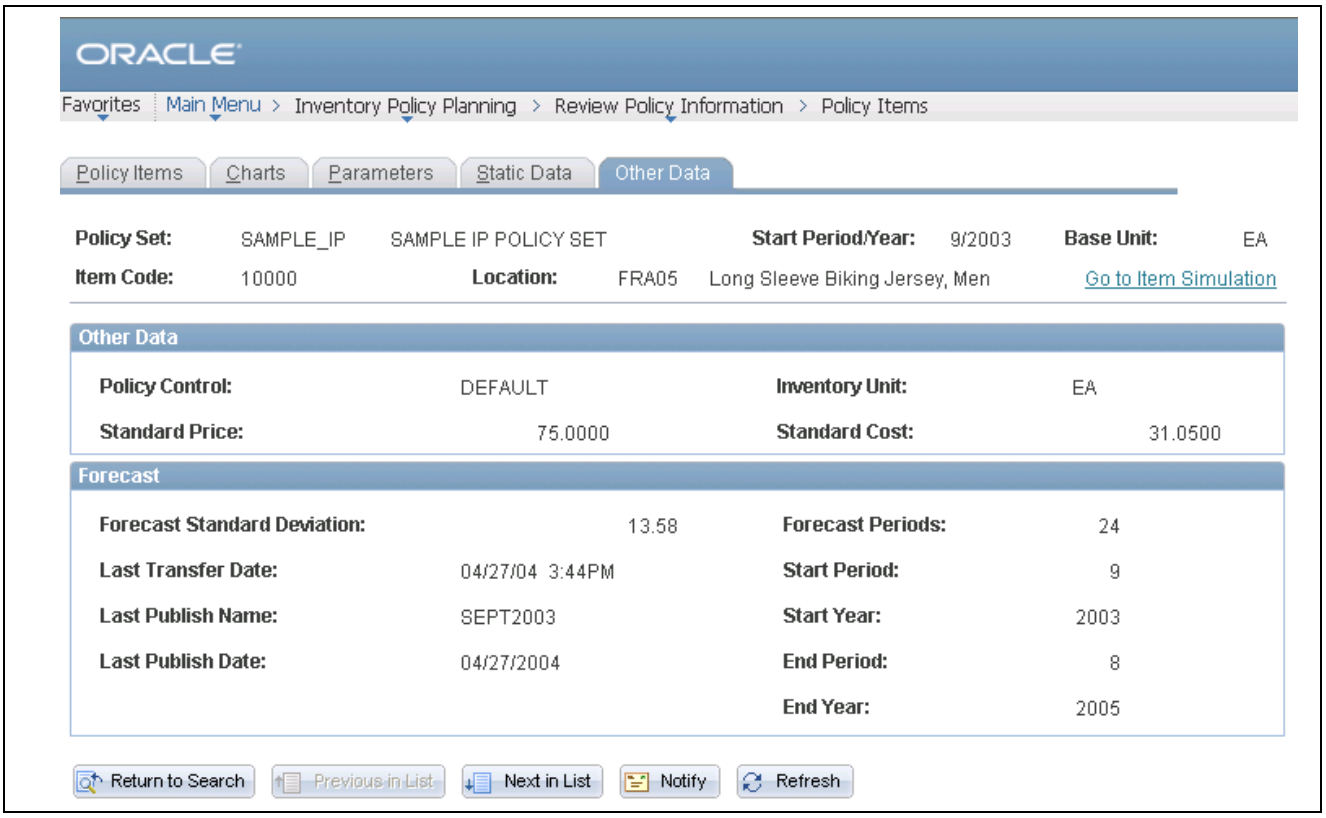
Task 6-40-2: Reviewing the Policy Items Page

In this step you review the Policy Items page, Other Data tab.

To review the page:

1. Select Inventory, Policy Planning, Review Policy Information, Policy Items.
2. Select a policy set and an item.

3. Select the Other Data tab, and verify that the Effective Demand Periods field has been removed.



Policy Items page: Other Data tab

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

Task 6-40-3: Reviewing the Define Cost Summary Groups Page

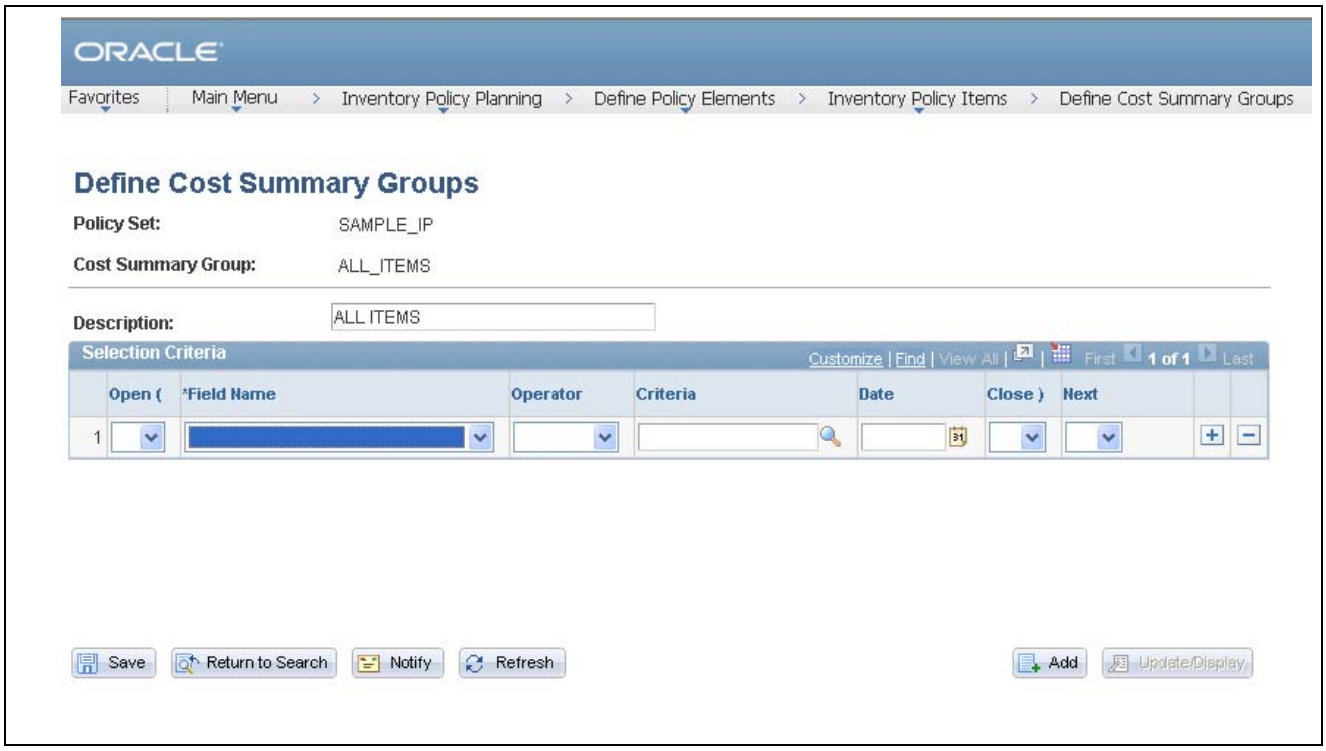
In this step, you review the Define Cost Summary Groups page.

To review the page:

1. Select Inventory Policy Planning, Define Policy Elements, Inventory Policy Items, Define Cost Summary Groups.

   The Define Cost Summary Groups page appears.

2. Select a cost summary group.



Define Cost Summary Groups page

3. Verify that any selection criteria based on the Effective Demand Periods field has been removed and make sure to add the open and close parentheses if necessary.
4. Repeat steps 2 and 3 for all upgraded cost summary groups.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

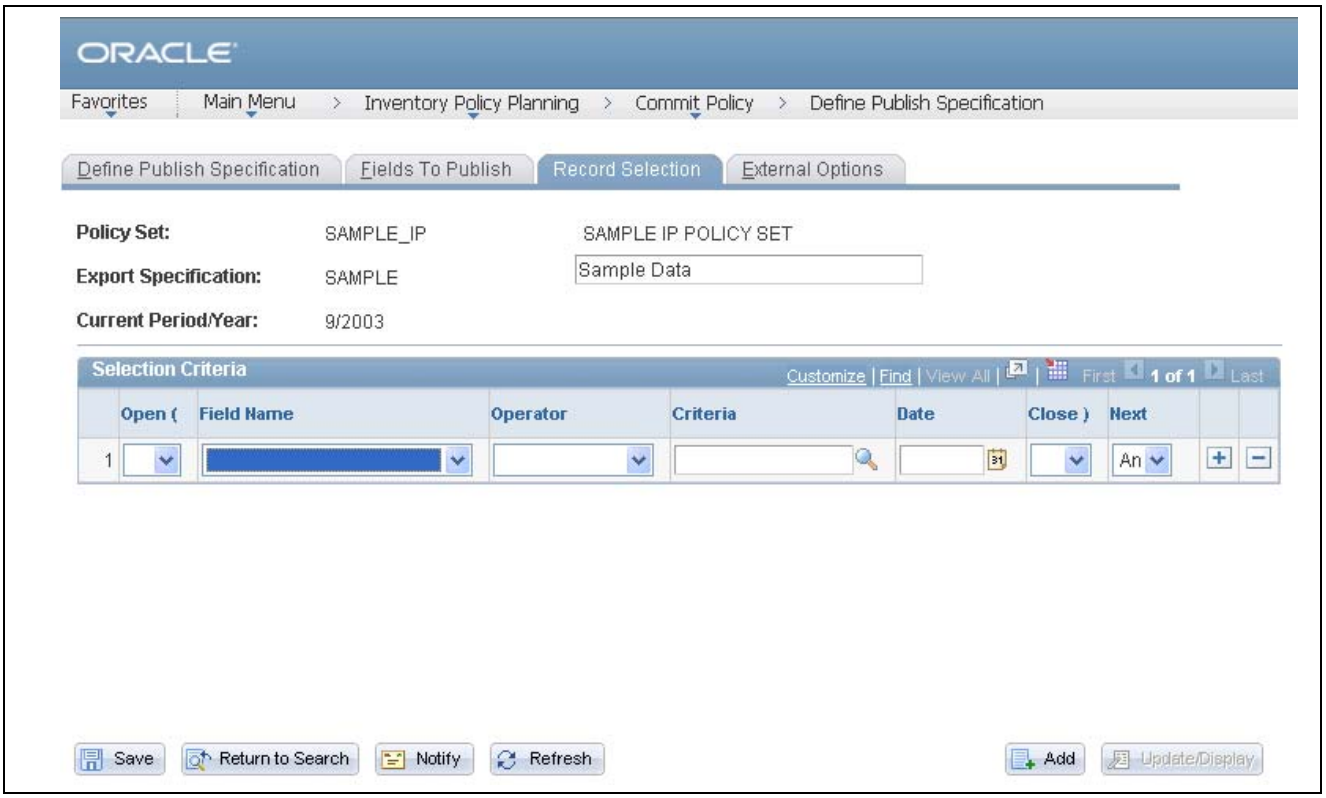
Task 6-40-4: Reviewing the Define Publish Specification Page

In this step, you review the Define Publish Specification page.

To review the page:

1. Select Inventory Policy Planning, Commit Policy Planning, Define Publish Specification.
2. Select a publish specification.
3. Select the Fields to Publish tab and verify that the Effective Demand Periods field has been removed from the field name drop-down list and/or the Selected Fields grid.
4. Select the Record Selection tab and verify that the Effective Demand Periods field has been removed from the field name drop-down list and/or the Selection Criteria grid.

   Make sure to add the open and close parentheses if necessary.



Define Publish Specification page: Record Selection tab

5. Repeat steps 2 through 4 for all upgraded publish specifications

Properties

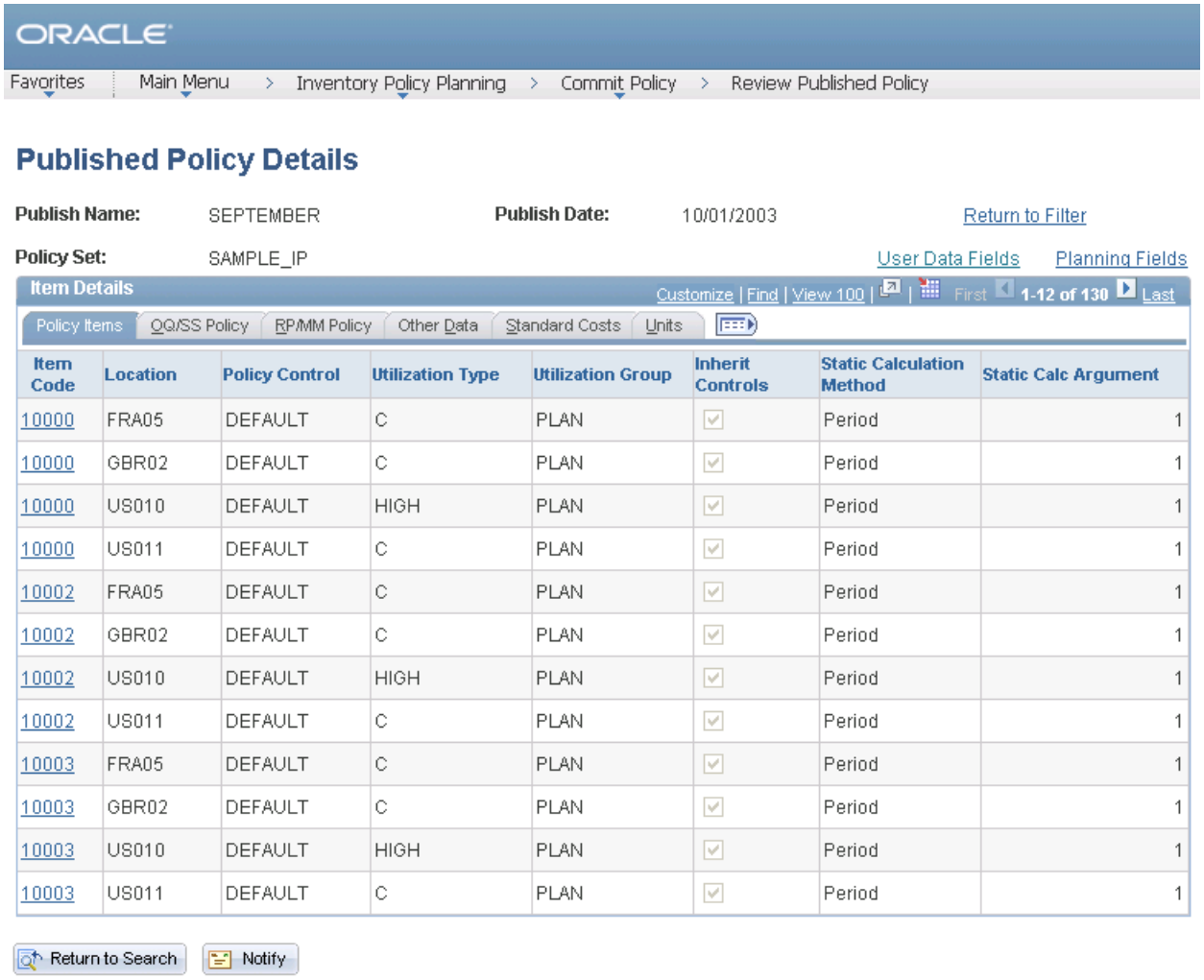
Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

Task 6-40-5: Reviewing the Published Policy Details Page

In this step, you review the Published Policy Details page.

To review the page:

1. Select Inventory Policy Planning, Commit Policy, Review Published Policy.
2. Select a published policy and click Search.



Item Code	Location	Policy Control	Utilization Type	Utilization Group	Inherit Controls	Static Calculation Method	Static Calc Argument
10000	FRA05	DEFAULT	C	PLAN	☑	Period	1
10000	GBR02	DEFAULT	C	PLAN	☑	Period	1
10000	US010	DEFAULT	HIGH	PLAN	☑	Period	1
10000	US011	DEFAULT	C	PLAN	☑	Period	1
10002	FRA05	DEFAULT	C	PLAN	☑	Period	1
10002	GBR02	DEFAULT	C	PLAN	☑	Period	1
10002	US010	DEFAULT	HIGH	PLAN	☑	Period	1
10002	US011	DEFAULT	C	PLAN	☑	Period	1
10003	FRA05	DEFAULT	C	PLAN	☑	Period	1
10003	GBR02	DEFAULT	C	PLAN	☑	Period	1
10003	US010	DEFAULT	HIGH	PLAN	☑	Period	1
10003	US011	DEFAULT	C	PLAN	☑	Period	1

Published Policy Details page

3. Verify that the Period Information tab has been removed from the Published Policy Details page.
4. Select the Other Data tab, and verify that the Forecast Periods and Run out Date columns have been transferred to that tab.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

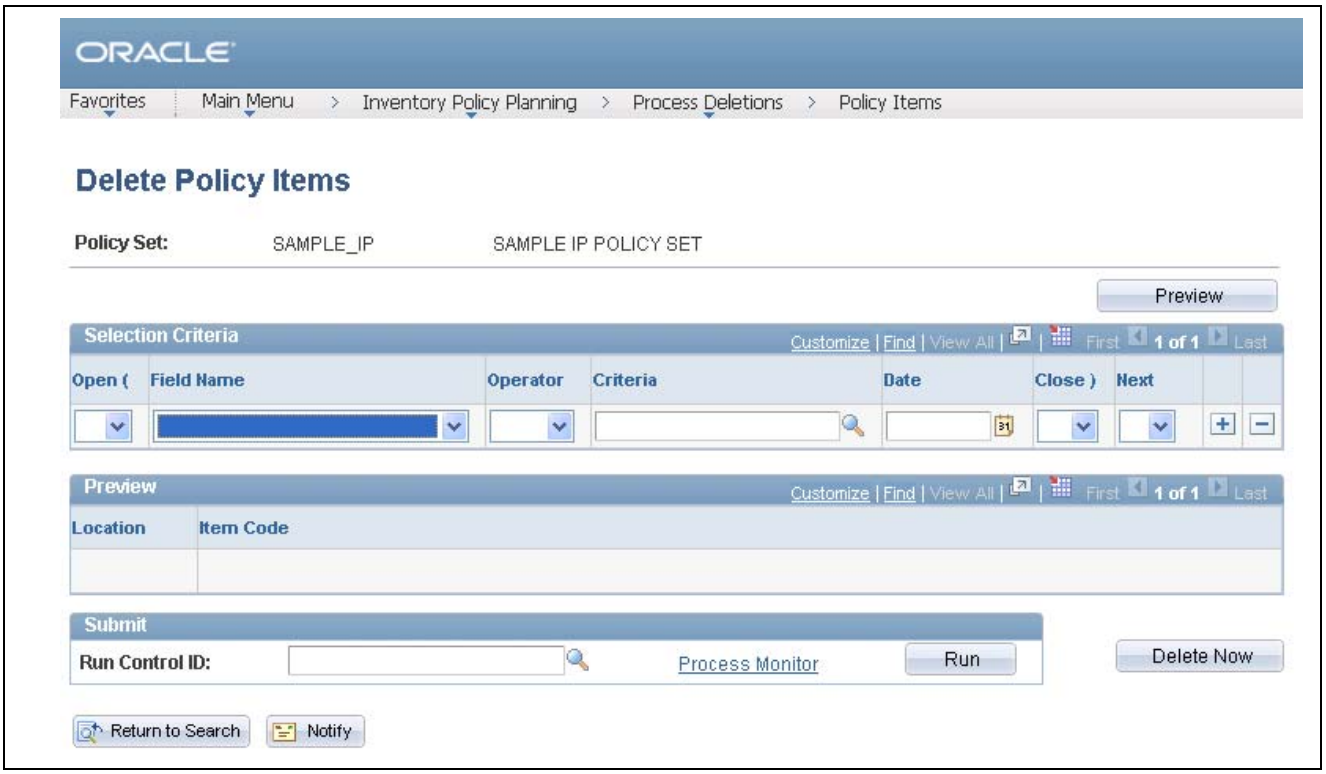
Task 6-40-6: Reviewing the Delete Policy Items Page

In this step, you review the Delete Policy Items page.

To review the page:

1. Select Inventory Policy Planning, Process Deletion, Policy Items.

2. Select a policy set and verify that Effective Demand Periods is not listed in the field name drop-down list on the Delete Policy Items page.



Delete Policy Items page

Properties

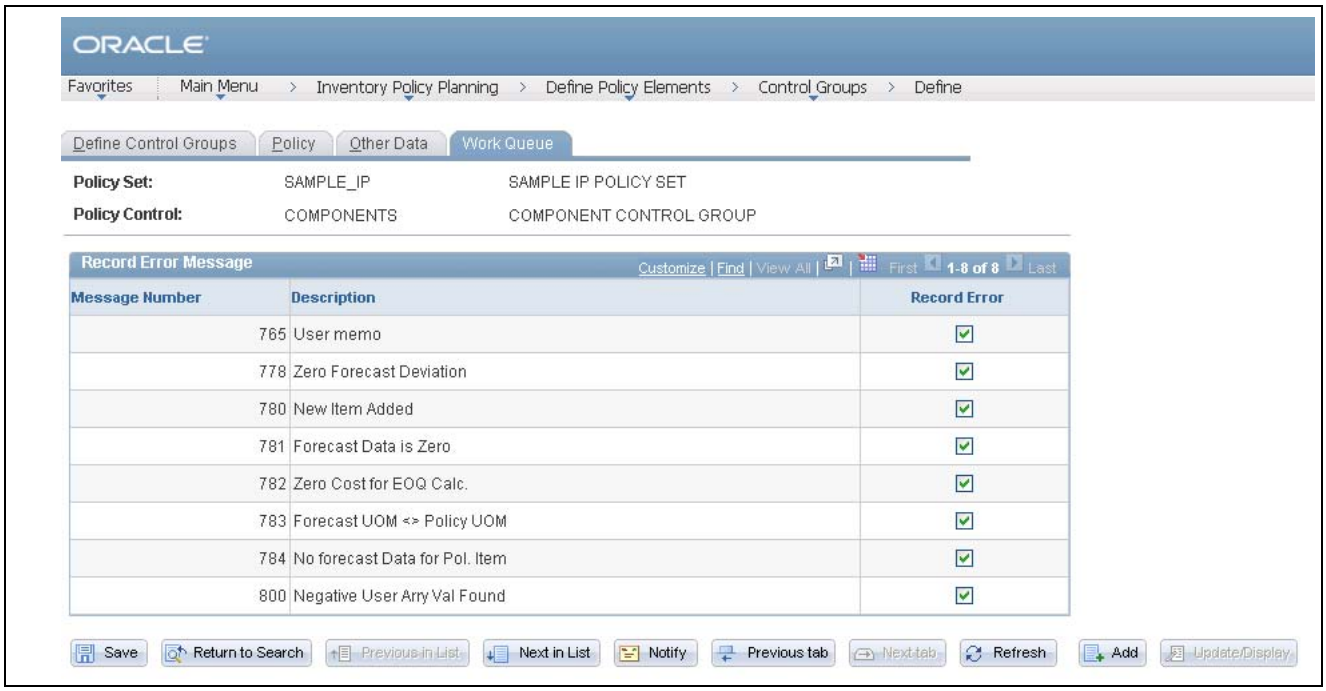
Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

Task 6-40-7: Reviewing Work Queue Messages

In this step, you review the work queue messages on the Define Control Groups, Work Queue Message, Work Queue Specification, and Work Queue Workbench pages.

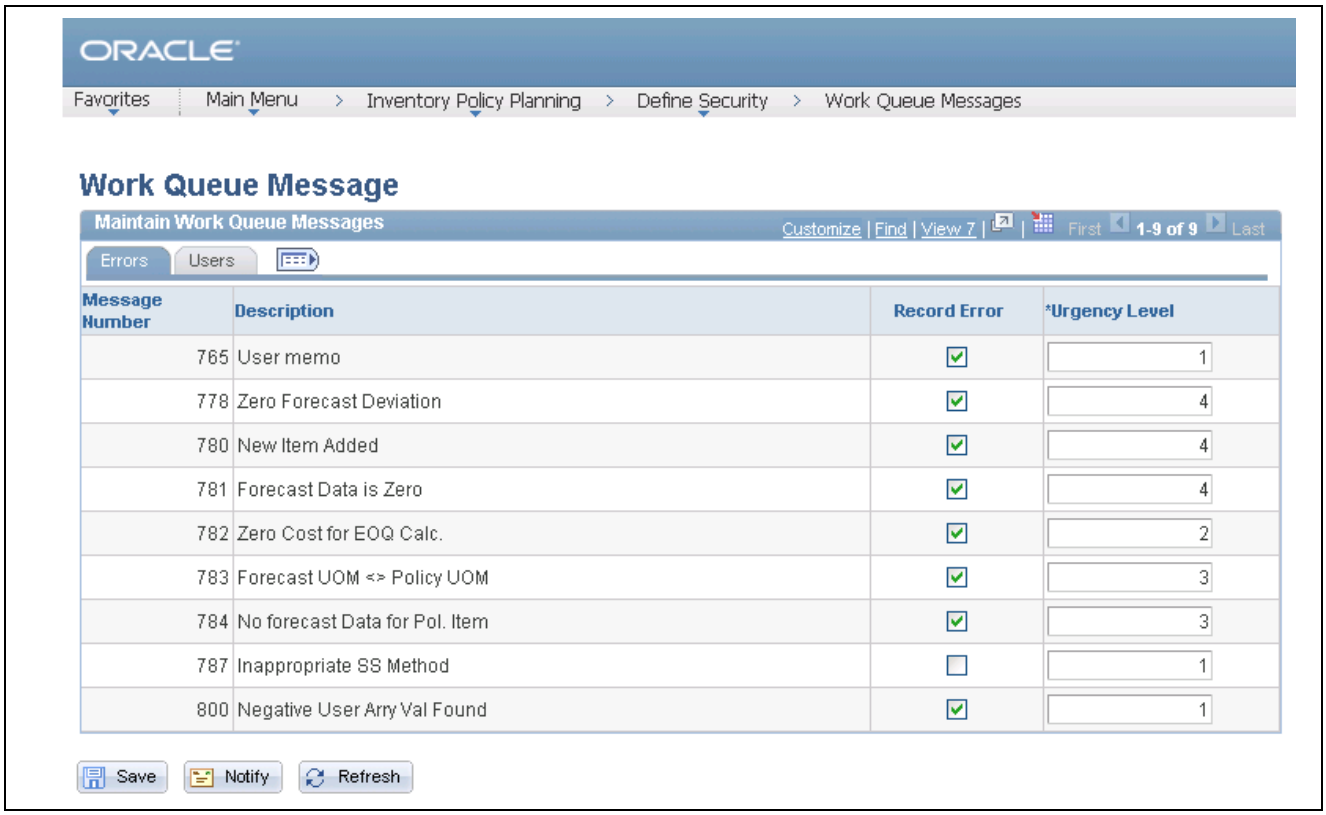
To review the pages:

1. Select Inventory Policy Planning, Define Policy Elements, Control Groups, Define.
2. Select a control group for a policy set and verify that “Message 779 – Variance Law Used” has been removed from the Define Control Groups page.



Define Control Groups: Work Queue tab

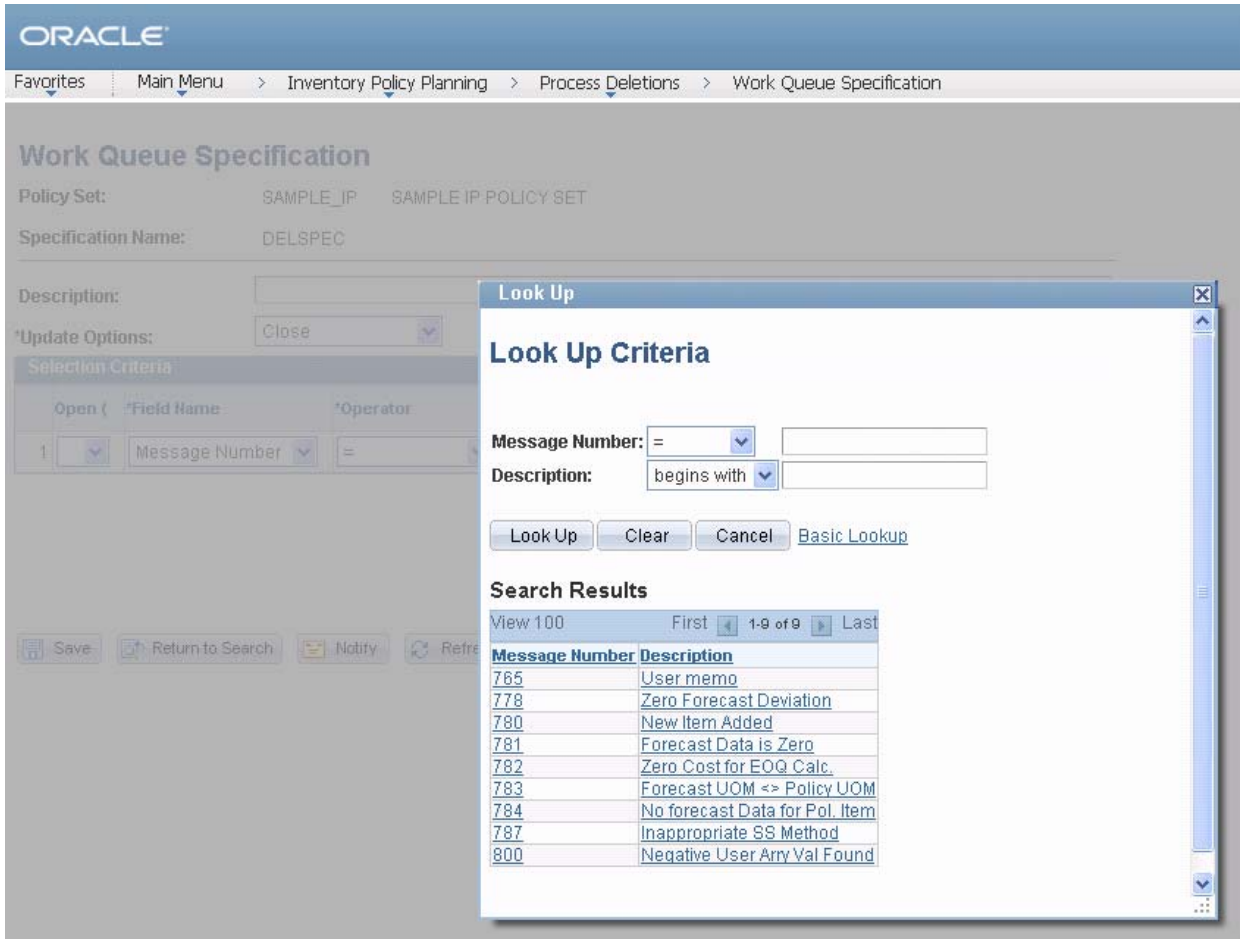
3. Select Inventory Policy Planning, Define Security, Work Queue Messages.
4. Verify that "Message 779 – Variance Law Used" has been removed from the Work Queue Message page.



Work Queue Message page

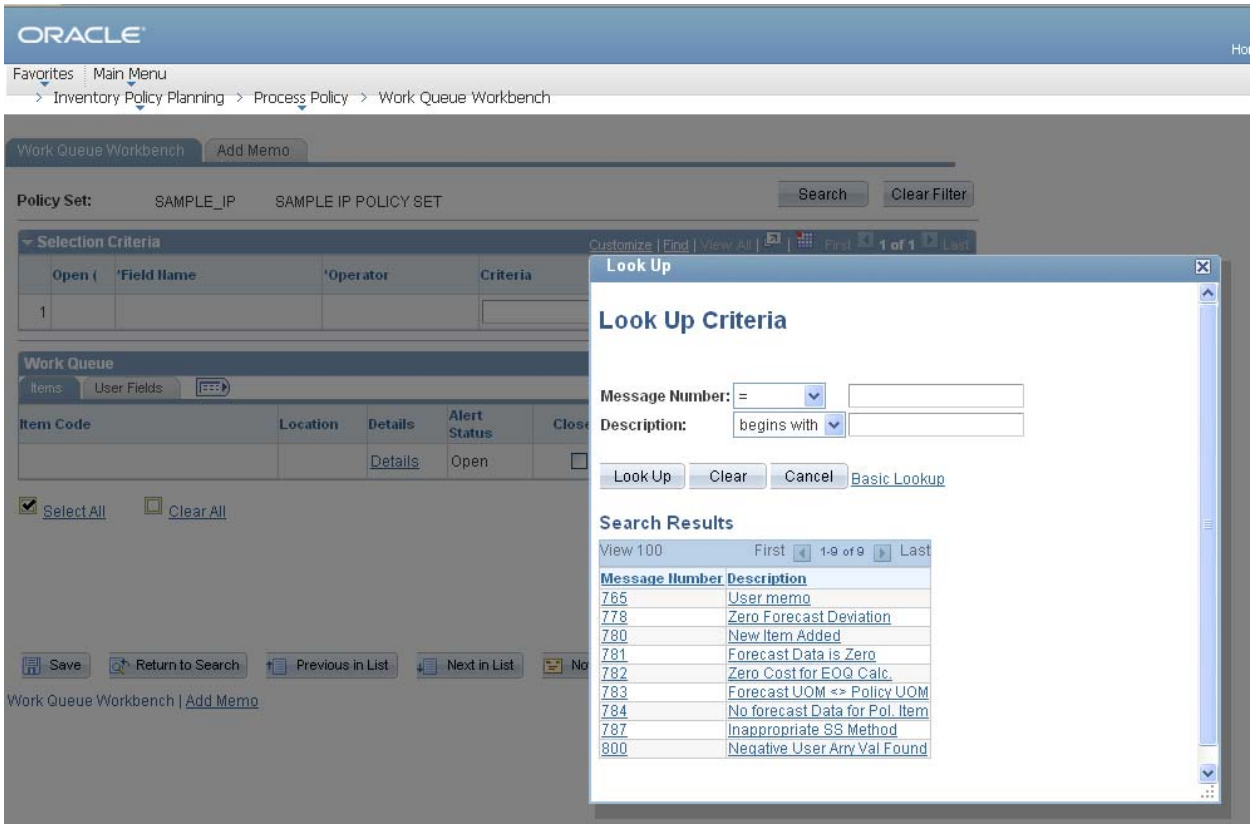
5. Select Inventory Policy Planning, Process Deletions, Work Queue Specification.

6. Select or create a work queue specification and make sure that message number 779 is not available as a criterion for the field name Message Number.



Work Queue Specification page: Look Up dialog box

7. Select Inventory Policy Planning, Process Policy, Work Queue Workbench.
8. Select a message number and make sure that message number 779 is not available as a criterion for the field name Message Number.



Work Queue Workbench page: Look Up dialog box

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory Policy Planning	All	All

Task 6-41: Configuring Inventory

In this task you define a customer ID to be used on return to vendor (RTV) stock requests. This RTV customer ID is a placeholder that enables you to ship returned stock to your vendors without having to define each of them as customers on the customer table. When a material stock request (MSR) is created, the customer ID fields default to the RTV customer ID, the name of the vendor (from the RTV transaction) appears in the customer name fields, and the vendor address appears in the IN_DEMAND_ADDR record as an override to the stock request.

To define the default RTV customer:

1. Select Customers, Customer Information, General Information, General Info.
2. On the Customer Information-General Information page, define a new ship-to customer.

   The customer ID should be easily identified as a dummy ID for RTV, such as, RTVID.

3. Select Set Up Financials/Supply Chain, Install, Installation Options, Inventory.
4. On the Installation Options-Inventory page, enter the customer ID that you created in step 2 in the Default RTV Customer ID field.

   If the default RTV customer ID has not been defined, an error will be displayed when you save the RTV transaction in PeopleSoft Purchasing.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Inventory	All	All

Task 6-42: Deleting Rename Data

After completing the final Move to Production pass, delete all the data stored in the PSOBJCHNG table. Do not delete this data if you have not completed your final Move to Production pass. The application rename data stored in the PSOBJCHNG table must be deleted before starting your next PeopleTools-only upgrade. The build process looks in this table when running alter renames.

Run the following SQL on your Target database:

```
DELETE FROM PSOBJCHNG
```

Important! Perform this task only once, after you complete your final Move to Production pass.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 6-43: Stamping the Database

In this step, you set the database to the release level of the Demo database. The values that you enter here appear whenever you view the Help, About PeopleTools dialog.

To stamp the database:

1. Launch PeopleSoft Application Designer on your Copy of Production database using the new PeopleSoft release.
2. Select Tools, Upgrade, Stamp Database.
3. Fill in all three of the PeopleSoft Release fields with the appropriate value for your product line and release number:


```
Financials/SCM, 9.10
```

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*.

Note. If you are upgrading directly to a Feature Pack, enter 0.

5. Click Stamp.
6. Close PeopleSoft Application Designer.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

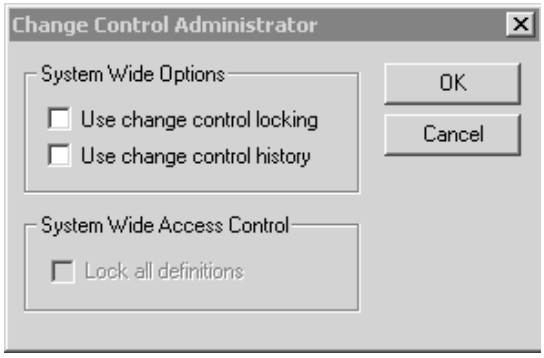
Task 6-44: Reviewing Change Control

Earlier in the upgrade process, in the beginning of the chapter "Applying PeopleTools Changes," the Change Control feature was disabled. In this step, you re-enable Change Control, if your site uses this functionality.

To turn on Change Control:

1. Sign in to the Target database using PeopleSoft Application Designer.
2. Select Tools, Change Control, Administrator.

   The following example shows the options available on the Change Control Administrator dialog box:



Change Control Administrator dialog box

3. Set "Use change control locking" and "Use change control history" according to your site specifications.

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are only executed during the initial pass, and the feature is only disabled during the initial pass. If you enable the feature at this point, it will remain enabled during future test Move to Production passes.

See "Applying PeopleTools Changes," Turning Off Change Control.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 6-45: Backing Up Before Testing

Back up your Copy of Production database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-46: Testing Your Copy of Production

In this task, you test your Copy of Production. Testing your Copy of Production will ensure that you can still operate your day-to-day processes on your new release. After you have reviewed your DDDAUDIT, SYSAUDIT, and SYSAUD01, verify that the system is working properly by reviewing the system online. After you are comfortable that the system is working properly, you can perform the Test Move to Production upgrade pass.

See Getting Started on Your PeopleSoft Upgrade, Appendix: “Planning for Upgrade Testing.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 7

Applying Changes to the Production Database

This chapter discusses:

- Understanding the Move to Production
- Testing the Move to Production
- Testing Once More
- Performing the Move to Production

Understanding the Move to Production

Once you complete all of the necessary tasks to launch your system into production, you are ready to begin your Test Move to Production passes or to move your system into production.

Task 7-1: Testing the Move to Production

This section discusses:

- Understanding the Test Move to Production Passes
- Understanding the Test Move to Production Steps
- Creating a New Change Assistant Job

Understanding the Test Move to Production Passes

Everything you have done to this point is the initial pass of the upgrade process. Now you are ready to start the Test Move to Production pass. The initial pass is very time consuming and requires a lot of analysis at different steps of the process to troubleshoot issues. The Test Move to Production pass is a different series of steps, which includes a subset of the previous tasks, and takes advantage of the tasks performed during the first upgrade pass.

You should perform as many test moves to production as necessary to work out any issues and to be comfortable with the process. During each Test Move to Production you will be able to refine the process so that you can save time and avoid manual processes. These test passes will also let you know how long the process takes so you can plan your production downtime for your move to production weekend.

Task 7-1-1: Understanding the Test Move to Production Steps

The following text is a high level view of what you will be doing in the Move to Production test pass. The remaining steps in this task will prepare your test environment. For example, you may need to move some scripts generated in the initial pass to a new PeopleSoft Change Assistant staging directory. Next you will create a new PeopleSoft Change Assistant job, setting the Type of Upgrade to Move to Production. That will give you a job with steps filtered with only those steps that apply to the Move to Production (MTP) test pass. From that point forward, you will simply follow the steps as they exist in your new job.

One of those first steps will be to take a Copy of Production. This second Copy of Production is sometimes referred to as the "New Copy of Production." The first Copy of Production, or "old" Copy of Production, will now be the Source database (it was the Target database in the initial test pass). The New Copy of Production is now the Target database.

The steps executed in the MTP pass vary in several ways. Many of the tasks and steps in the initial test pass will be replaced in the MTP pass with PeopleSoft Data Mover export and import scripts. In the initial pass, some steps required you to make functional decisions and take time to manually set up data. That data can be copied from the first database to the next, saving you setup time and eliminating the chance for manual error or typos.

Also, the MTP pass does not repeat the database compare/copy steps. You made the decisions once; there is no need to repeat these steps. Instead, a PeopleSoft Data Mover script, MVPRDEXP, will export all of the tables that contain the PeopleSoft PeopleTools objects like records and PeopleCode from the first database. Another PeopleSoft Data Mover script, MVPRDIMP, will import those tables into the second database. Anything you have done to PeopleSoft PeopleTools objects while executing or testing the first pass—copied objects from the Demo database, reapplied customizations, applied updates from the My Oracle Support website—will be moved to the second Copy of Production with these scripts.

Another important difference with the MTP pass is the handling of SQL scripts that create and alter tables. In the initial pass, you generated the SQL scripts, sometimes edited the SQL script, and then executed the SQL scripts. In the MTP pass, you may be able to skip the generation steps and use the SQL you previously generated. This is another way to save time in your critical go-live window and is the ultimate goal, but it is an incremental process to get to that point.

In the first MTP pass, everyone must regenerate the SQL. There are small differences between the initial and MTP passes that require the SQL to be regenerated in at least one MTP pass. The PeopleSoft Change Assistant templates are delivered with the steps set this way.

In subsequent MTP passes, you may choose to "turn off" the generation steps if possible. If you have not changed any records at the end of one MTP pass, then you can reuse the SQL in your next pass. If you have done anything to change records, you should generate SQL again. This can include changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.47 to 8.48), or applying updates from the My Oracle Support website that involve record changes, or making additional customizations to records.

If you choose to skip some of these steps, do one of the following: mark the step complete in your job, or change the step properties in the template, so that the step will never show up in your MTP filtered job again. To change the step properties, double-click on the step to open the Step Properties dialog, and change the Type of Upgrade to Initial Upgrade. In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. PeopleSoft Change Assistant will look for the SQL scripts in the output directory set on the job's Database Configuration, so make sure it will find them when it tries to run them.

The steps that are eligible for this treatment will contain Move To Production documentation notes indicating such.

Note. If you have made any changes to your trees, tree structures, or PS/Query objects since the upgrade began, you may want information on how to preserve those changes.

See Appendix: "Preserving Queries and Tree Objects."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 7-1-2: Creating a New Change Assistant Job

You need to create a new PeopleSoft Change Assistant job for each test Move to Production pass.

To create a new PeopleSoft Change Assistant job:

1. Oracle recommends that you use new output and stage directories for each new test pass. Create those directories now.
2. From PeopleSoft Change Assistant, select Tools, Options and specify the new output and staging directories on the Change Assistant Options page.
3. Select File, Open Environment and select the environment.
4. Review the configuration in the General Settings dialog box.

   The Database Type, Language and SQL Query Executable will be the same as your previous job. Make changes to the *PS_HOME* and *PS_APP_HOME* settings, if necessary, and select Next.
5. Specify the Source Database setup information and click Next.

   This is the Copy of Production database from your previous pass.
6. Specify the Target Database setup information and click Next.

   This is the new Copy of Production database.
7. Review the environment configuration on the Confirm Selections dialog box, and click Next to save the changes to the environment.
8. Select File, New Job.
9. In the Use Template dialog box, select the template and click OK.
10. In the Type of Upgrade dialog box, select Move to Production.
11. Click OK.

    A new upgrade job is created, using the naming convention "*Template_Environment*_Move to Production."
12. Highlight the job name and select Edit, Set Documentation Directory, then select the directory where the documentation is located and click OK.
13. Select View, Documentation.
14. Select View, Expand All to display all the steps in the job that apply to your upgrade.

    The job will contain steps that were not in the initial upgrade pass and will exclude some steps that were in the initial upgrade pass, based on the step properties.

Now you are ready to run the job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 7-2: Testing Once More

As in any implementation project, you must consider planning, resources, development, and training. Testing also needs to be an integral part of your implementation project. Testing your database once more, after you have completed the upgrade, ensures that you can still operate your day-to-day processes on your new PeopleSoft release.

The level of testing in this task will focus primarily on the strategies to employ before moving into production.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 7-3: Performing the Move to Production

When you are ready, you can move the system into production. Take your system out of production and perform all of the steps involved in testing the Move to Production against your production database.

See Testing the Move to Production.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

CHAPTER 8

Appendices

Understanding Appendices

The appendices portion of this documentation contains information that you may need for your upgrade. The appendices have been referenced throughout the upgrade documentation for further understanding of the upgrade that you are performing. Oracle recommends that you read each appendix as it is referenced in the documentation.

APPENDIX A

Applying Fixes Required for Upgrade

This appendix discusses:

- Preparing to Apply Fixes
- Applying Fixes During Installation
- Applying Fixes After Copying Project
- Applying Fixes After Data Conversion
- Applying Fixes Between Upgrade Passes
- Applying Fixes in Move to Production

Task A-1: Preparing to Apply Fixes

This appendix gives general instructions for applying a Required for Upgrade fix for your upgrade. If the directions given in a particular fix are different from those given here, then follow the instructions in the fix.

It is important that you run your upgrade using the latest versions of all upgrade software. On My Oracle Support, check the upgrade page and the patches and updates page to ensure that you have all of the latest code.

Ideally, you should follow the steps below to apply the various files and fixes.

To apply files and fixes:

1. Install the new release from the CD.
2. Apply any additional scripts and projects from the My Oracle Support upgrade page to your new release codeline (and to the New Release Demo database, if applicable).
3. Apply any other Required for Upgrade fixes from My Oracle Support's patches and updates page to your new release codeline (and to the New Release Demo database, if applicable).
4. Run your initial pass of the upgrade.
5. Before you begin each subsequent upgrade pass, check the upgrade page for new versions of any files that you previously applied.

   Then check patches and updates for any new Required for Upgrade fixes.

Your initial upgrade pass will differ from your subsequent Test Move to Production passes. Some of the upgrade tasks and steps are common to both the initial upgrade pass and the Move to Production pass. For this reason, you may find Required for Upgrade fixes that do not apply to the upgrade pass that you are currently performing. The details provided with each fix will help you determine whether to apply the fix and when to apply it. The fix will also tell you what to do if you have already passed the step for which the fix is needed.

How you apply a fix depends on where you are in the upgrade process. This appendix explains how to apply a typical fix, and is organized by the various points within the upgrade where you will apply fixes.

Task A-2: Applying Fixes During Installation

In the chapter, "Starting Your Upgrade," in *Getting Started on Your PeopleSoft Upgrade,* you should first download and apply all files and objects from the upgrade page on My Oracle Support. Then you must download all Required for Upgrade fixes from the patches and updates page on My Oracle Support. You can use the instructions in this section to apply any additional fixes that are posted, until you reach the task, "Running New Release Compare Reports."

If a fix contains a project that needs to be copied from a file, apply it to your New Release Demo database during installation. If the project contains changes for records or fields, those objects will be updated during the normal compare and copy steps in the upgrade. You will not have to build objects in the project separately or consider whether it will have an impact on customizations. You will do that with the rest of the objects during the upgrade. Apply as many of the fixes as you can at this time.

To apply script fixes during installation:

1. Download Required for Upgrade change packages using the "Download Change Package" functionality in PeopleSoft Change Assistant.
2. Use PeopleSoft Change Assistant to apply the updates into your New Release Demo database.

   Review the documentation included with each update prior to applying each update. You may need to perform manual steps to successfully apply the update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, "Applying Updates."

Task A-3: Applying Fixes After Copying Project

It is best not to apply fixes during the compare and copy tasks in the "Running and Reviewing Compare Reports" and "Applying Application Changes" chapters of the initial upgrade pass. It can also be cumbersome to apply record and field changes during the creating and altering of tables in the "Completing Database Changes" chapter. It is, therefore, best to wait until just before the "Running Data Conversion" task in the "Applying Application Changes" chapter to apply additional fixes. Most of the fixed objects will be data conversion code, delivered in projects.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade change packages using the "Download Change Package" functionality in PeopleSoft Change Assistant.
2. Use PeopleSoft Change Assistant to apply the updates into your New Release Demo database for this upgrade pass.

   Review the documentation included with each update prior to applying each update.

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, "Applying Updates."

3. The project is now loaded on your New Release Demo database. You should run a project compare to make sure that the objects in the fix will not overwrite any of your customizations.

   If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.

4. If you are performing a Move to Production upgrade pass, first migrate the change packages into the Source database for this upgrade pass.

   If needed, first set up PeopleSoft Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the change package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply them to your Source database.

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, "Applying Updates."

5. Migrate the change packages into the Target database for this upgrade pass.

   If needed, first set up PeopleSoft Change Assistant with the environment information for your Target database.

Task A-4: Applying Fixes After Data Conversion

At this point, you have already converted all of your data for the upgrade pass, and you cannot apply Application Engine program fixes and use them in this upgrade pass. You should refer to the fix instructions to determine what to do in each case. Often, the instructions say that you need to restore your database from a pre-conversion backup and rerun data conversion to get the benefits of the fix. Because this is the only way you can get the fix onto your current Copy of Production, you may decide to allow the error and not apply the fix until you do a Test Move to Production. Then after you have completed that test pass, you can test the affected function. However, you should not do this if your next pass is your final Move to Production, and you are going into production with the resulting database. You should always test your upgraded database between test passes if changes have been made to procedures, scripts, or programs. You do not want any surprises during the final Move to Production.

Task A-5: Applying Fixes Between Upgrade Passes

You can apply fixes just before you start a Test Move to Production pass in the same way you would in the step above, Applying Fixes After Copying Project. In those instructions, you apply the fix to your New Release Demo database and compare it to the Copy of Production. Make sure that you do the database comparison to verify that the fix does not wipe out any customizations you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database. Then apply the fix to your Copy of Production, which you will use as the Source database in the Test Move to Production. The fix will then get moved to your New Copy of Production when you run the MVPRDEXP.DMS and MVPRDIMP.DMS scripts in the "Applying PeopleTools Changes" chapter.

Task A-6: Applying Fixes in Move to Production

Once you have started a Test Move to Production, do not apply any fixes until just before data conversion. Apply any fixes using the previous step, “Applying Fixes After Copying Project.” In those instructions you apply the fix to your New Release Demo database and compare it to your Copy of Production. Instead of using the original Copy of Production as the Target, you must now use your New Copy of Production, the one defined as the Target in your Move to Production PeopleSoft Change Assistant job. Be sure to do the database comparison to verify that the fix does not wipe out any customizations that you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database, then copy the project to your New Copy of Production.

APPENDIX B

Changing the User Interface

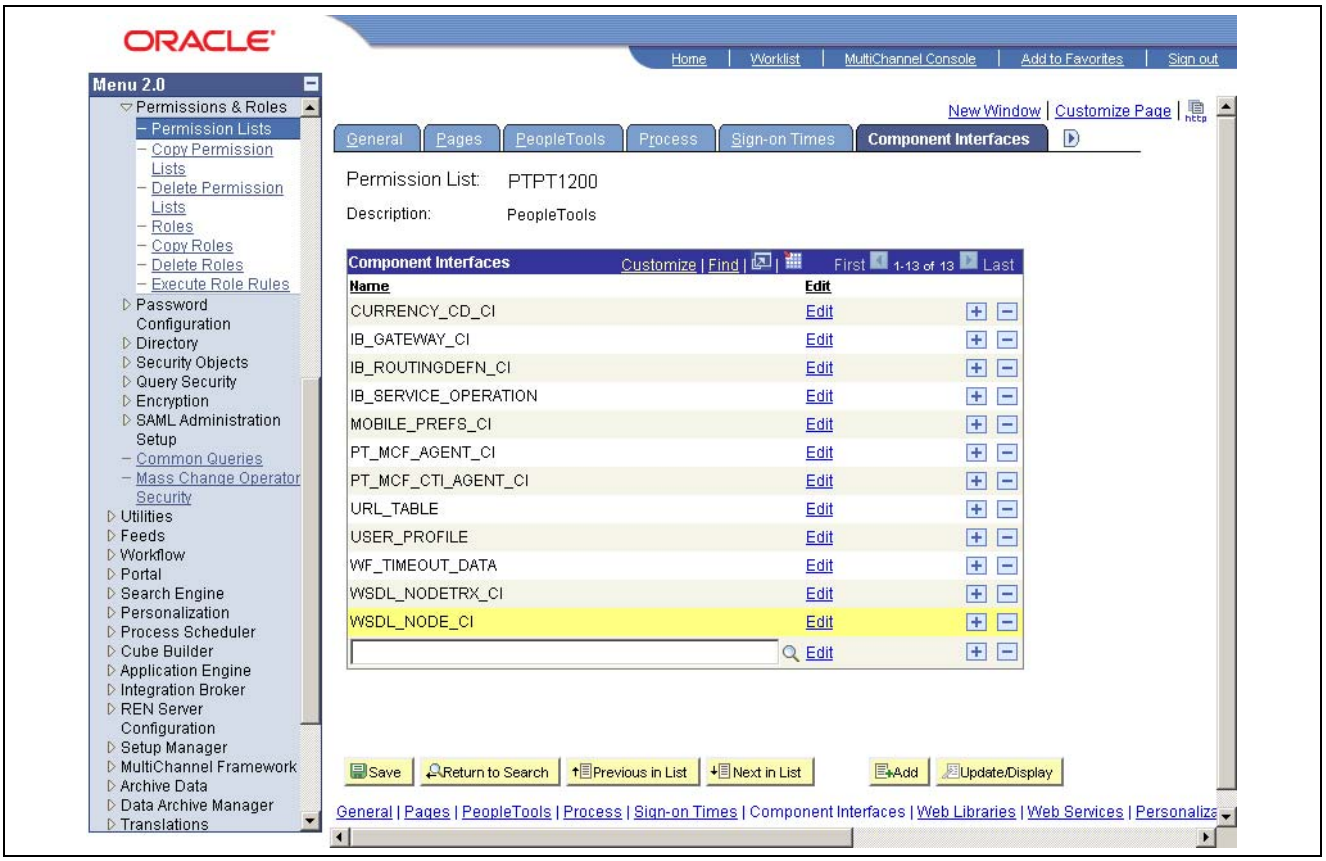
This appendix discusses:

- Changing the User Interface Style

Task B-1: Changing the User Interface Style

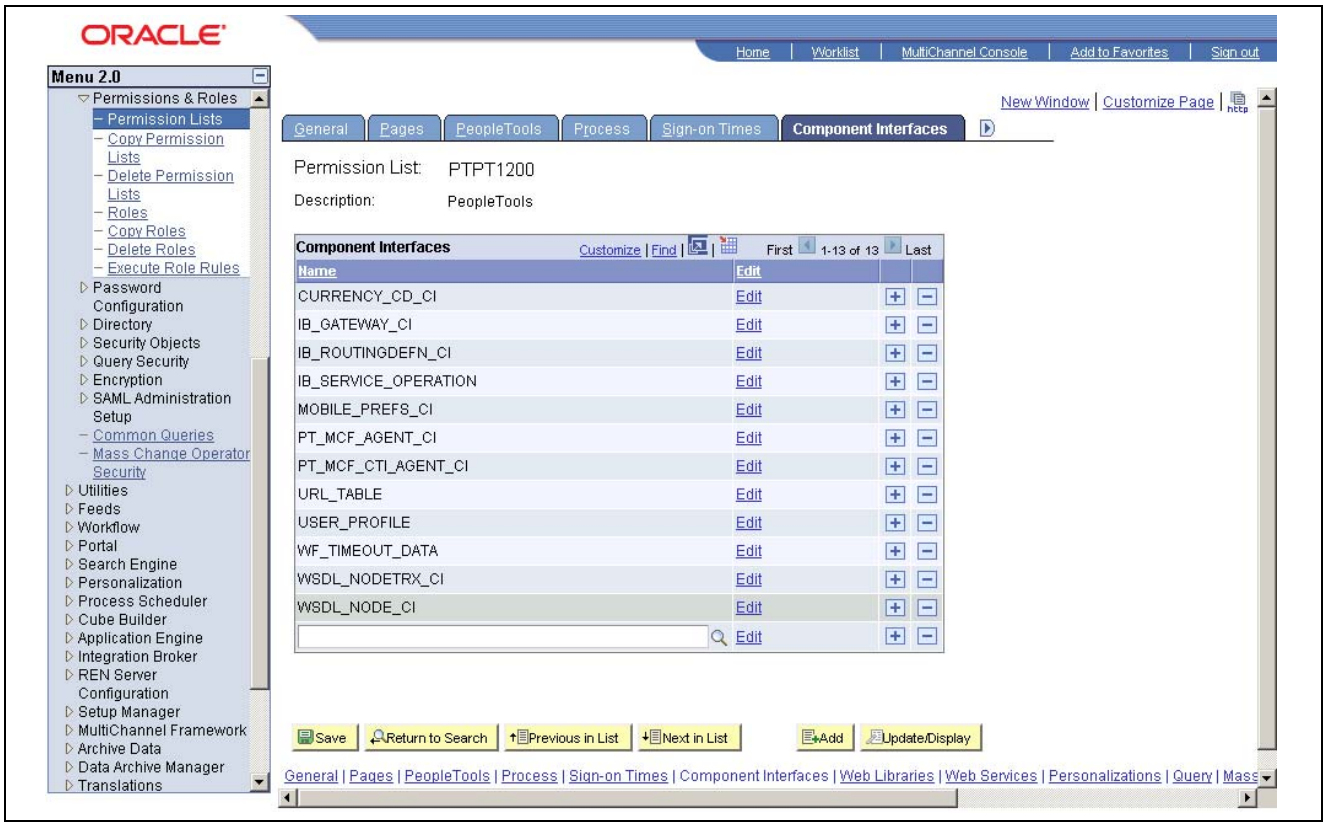
Three user interface options were delivered with your current release of PeopleSoft 8.x. The dark blue style is set as your default style. PeopleSoft 8.4 applications and pre-8.50 PeopleSoft PeopleTools system databases use the classic style, but all other applications use the new dark blue style. The classic and light blue styles are considered deprecated as of PeopleSoft PeopleTools 8.50. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The following example represents the classic style.



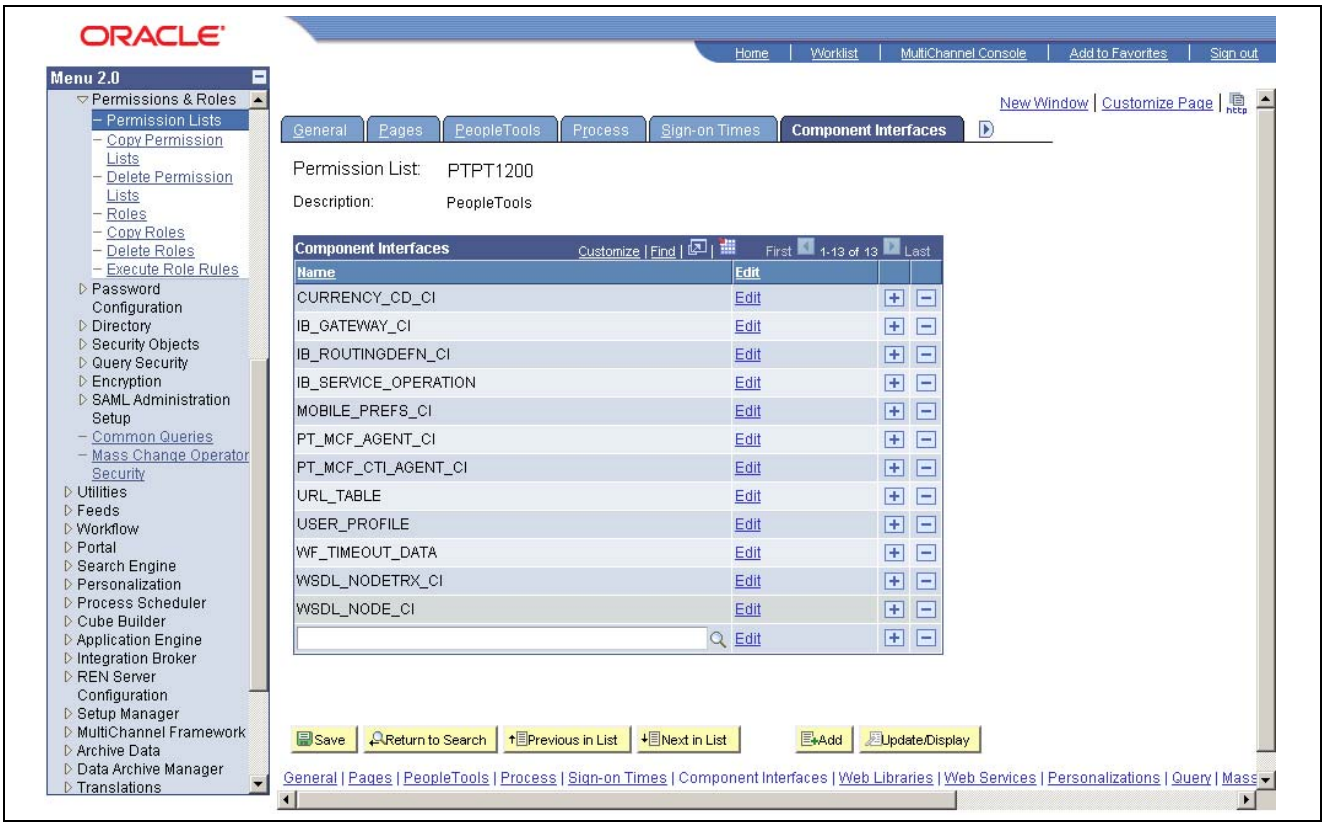
The classic style user interface option

The following example represents the light blue style.



The light blue style user interface option

This example represents the dark blue style.



The dark blue style user interface option

See the PeopleTools: PeopleSoft Application Designer Developer's Guide PeopleBook for your new release.

To change your style, you must delete the sub-stylesheets associated with the dark blue style and replace them with either the classic or light blue sub-stylesheets.

Note. The new user interface styles are supported by Internet Explorer release 5 and later and Netscape Navigator release 6 and later. If you are using a browser and release other than these, the system defaults to the classic style.

To enable a deprecated user interface:

1. In PeopleSoft Application Designer, select File, Open.
2. In the Open Definition dialog box, select Style Sheet from the Definition drop-down list.
3. Enter the name *PSSTYLEDEF* in the Selection Criteria Name field, and select Open.
4. Highlight PSSTYLEDEF in the list, and select Open.
5. Click the PSALTERNATE sub-stylesheet and press DELETE.
6. Select Insert, Insert Sub Style Sheet.
7. Select PSALTERNATE_LIGHTBLUE or PSALTERNATE.
8. Repeat steps 5 through 7 for the PTSTYLEDEF and PSACE sub-stylesheets, making sure to select the same sub-stylesheet that you used in step 7.
9. Select File, Save.
10. Open the stylesheet PSQUERYSTYLEDEF, as you opened a stylesheet in steps 1 through 4.

11. Click the PTQUERYSTYLESUB_DARKBLUE sub-stylesheet and press DELETE.
12. Select Insert, Insert Sub Style Sheet.
13. Select PTQUERYSTYLESUB_LIGHTBLUE or PTQUERYSTYLESUB.
    Use the same sub-stylesheet that you used in step 7.
14. Select File, Save.

APPENDIX C

Preserving Queries and Tree Objects

This appendix discusses:

- Understanding Preserving Queries and Trees
- Preparing the Database
- Creating a New Project
- Comparing the New Project
- Copying the Project
- Testing the Project
- Re-Exporting the PeopleTools Tables

Understanding Preserving Queries and Trees

This appendix contains information for preserving queries, trees, and tree structures. At the beginning of your upgrade, you should have informed your end-users and development team that your PeopleSoft system was frozen, meaning that no changes should have been made to any PeopleSoft PeopleTools tables or objects including queries, trees, and tree structures. The freeze on PeopleSoft PeopleTools changes is important because you will lose any changes to these objects made during an upgrade to PeopleSoft PeopleTools tables. Occasionally, however, end-users may have to make critical changes to trees, tree structures, and PS/Query objects. If this has happened in your system, you can perform a process to preserve those additions and changes to trees, tree structures, and queries. You will have to work with your end-users and developers to obtain a list of queries, trees, and tree structures that you need to preserve.

You will run through the test Move to Production (MTP) steps several times for practice and testing purposes. Please note that you have the option to perform the preserving queries and trees procedure during each of your test Move to Production runs, but you must perform it during the last run of the test Move to Production. If you do not perform this procedure during your last run to preserve the trees, tree structures, and queries that have been changed since the beginning of your upgrade, they will be lost.

Note. The process outlined in this appendix to preserve trees and queries should be performed prior to data conversion so that any additional conversion would be taken care of by the appropriate data conversion programs.

This appendix includes instructions to prepare your database and create a project on which to preserve your queries, trees, and tree structure changes.

Task C-1: Preparing the Database

In this step, you create a new copy of your current production database, perform steps on the new copy, and run scripts against the new copy to update the release level.

To prepare the database:

1. At the beginning of the test Move to Production, you should make a new copy of your current production database. To preserve queries and trees, you need to make not only that Copy of Production but also an additional copy of your current production database. For clarity, Oracle refers to this additional copy of your production database as the Tree/Query Copy of Production database. So now you should have a Copy of Production database and a Tree/Query Copy of Production database.
2. Perform the test Move to Production on your Copy of Production database.
3. To obtain the queries and trees that you want to preserve, the Tree/Query Copy of Production database needs to be at the same release level as the Copy of Production database on which you just completed the test Move to Production. To update your Tree/Query Copy of Production to the same release, you run release scripts against this database. Oracle refers to this as "reling up" the database. Use the Custom Compare template to "rel up" your database. Select the Product Line *PEOPLETOOLS* when configuring your PeopleSoft Change Assistant job.

Task C-2: Creating a New Project

Now that your Tree/Query Copy of Production is at the same release as your Copy of Production database, you create a project in the Tree/Query Copy of Production that contains all of the queries and trees that you wish to preserve.

To create a new project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, New...
3. Select *Project* for Object Type.
4. Select File, Save Project and enter a project name; for example, *PRESERVED*.
5. Select the Upgrade tab in PeopleSoft Application Designer.

   Note. Queries and trees do not appear in projects under the Development tab in PeopleSoft Application Designer. To see the queries and trees that you will insert into the PRESERVED project in the next step, you must make sure that you are using the Upgrade view of PeopleSoft Application Designer.

6. Select Insert, Definitions into Project...
7. Select Queries from the Definition Type drop-down list box and click Insert.
8. Using your list of identified queries that need to be preserved, highlight each one of those queries from the PeopleSoft Application Designer list.

   You can highlight more than one by holding down the Control (CTRL) key while you click the name of the query.

9. After you have highlighted all of the queries that you want to preserve, click Insert, then click Close.

   Under the PRESERVED project name in the Upgrade view of PeopleSoft Application Designer, you will see Queries as an object type in the project.

10. Double-click on queries under the PRESERVED project to see a listing of all of the queries to preserve in the right-hand window of PeopleSoft Application Designer.

11. Select File, Save Project.

12. Repeat steps 6 through 11 for trees and tree structures.

    Now your PRESERVED project should contain all of the queries, trees, and tree structures that you want to preserve.

Task C-3: Comparing the New Project

In this step, you compare the queries, trees, and tree structures that are in your PRESERVED project against your Copy of Production database. Because the tree objects in your PRESERVED project are not comparable objects in PeopleSoft Application Designer, you must manually compare the tree objects that you want to preserve. During the query and tree structure compare process, the Application Upgrade utility sets the project flags. These flags determine whether the following actions will occur:

- Changes will be performed on the Copy of Production (Target) database when you perform the export and copy.
- Changes will be tagged as *Copy* or *Delete* operations.
- The project flags will be set to automatically take these actions or not.

These settings are determined based on whether or not the objects in the project currently exist on the Copy of Production (Target) database.

To compare the new project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, Open...
3. For Definition, select Project and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Compare and Report.
6. Sign in to your Copy of Production.
7. From the Object Type box, select *Queries and Tree Structures*.
8. Click Options…
9. Select *PeopleSoft Vanilla* for the Target Orientation.
10. Select *Project* for the Compare Type.
11. Verify that the Compare Report output directory is set to the correct location.
12. Select the Report Filter tab and set the report filter check boxes appropriately for your compare.
13. Click OK.

14. Select Compare.
15. Review the compare reports for queries and tree structures. In addition, perform a manual compare of the trees that you want to preserve. Based on the results of this review, set the Action and Upgrade check box appropriately in the PRESERVED project.

Task C-4: Copying the Project

In the following steps, you copy the PRESERVED project to the Target database. This is the Copy of Production database on which you ran the test Move to Production.

To copy the project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, Open...
3. For Definition, select *Project* and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Upgrade, Copy.
6. Sign in to your Copy of Production database.
7. Make sure that the Reset Done Flags and Copy Project check boxes are selected.
8. Click Select All.
9. Click Copy.
10. Using the Upgrade view of the PRESERVED project in PeopleSoft Application Designer, review the Done flags in the project to make sure that all of the objects that you wanted to preserve were copied to the Target database.

Task C-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 C-6: Re-Exporting the PeopleTools Tables

Once you are satisfied with the test results, you must re-export the PeopleSoft PeopleTools tables to actually preserve the queries, trees, and tree structures. During your test Move to Production, you ran MVPRDEXP.DMS to export the PeopleSoft PeopleTools tables. You will use the output files created from running this job as input files during your Move to Production. Because these files were created before copying the queries, trees, and tree structures that you wanted to preserve, the files do not contain the preserved objects, so you must run the MVPRDEXP.DMS script again. Running the MVPRDEXP.DMS script again ensures that you have the most current PeopleSoft PeopleTools tables.

To re-export the PeopleTools tables:

1. As a PeopleSoft user, launch PeopleSoft Data Mover against your Copy of Production database and run the following script:

   ```
   \PS_HOME\SCRIPTS\MVPRDEXP.DMS
   ```

2. Use the output files created during your final Move to Production.

APPENDIX D

Reviewing Tablespaces

This appendix discusses:

- Understanding Tablespace Review
- Reviewing Table Names

Understanding Tablespace Review

This appendix lists the tables that previously existed in 4K page size tablespaces that now reside in 32K page size tablespaces in the new release.

Task D-1: Reviewing Table Names

Task D-1-1: Reviewing 8.8x Table Names

Review the following 8.8x tables.

- AP_PAYSEL_AET
- BL_EXS_DFLT_AET
- CP_EXPR
- CP_EXPR_FORMAT
- CP_INTRN_VAR
- CP_MESSAGE
- CP_MESSAGE_LANG
- CP_RULE_DETL
- CP_RULE_D_LANG
- CP_RULE_HT_LANG
- CP_RULE_HTML
- CP_USERCD_HDR
- EMPL_PHOTO
- EOEW_ETL_STEP

- OM_BCK04_AET
- OMBI_INTFC_AET
- OMB_PRICER_AET
- OM_HOLD_AET
- PROD_SPC_DE_TAO
- PV_ATT_DB_SRV
- RECV_LN_DISTRIB
- TR_ATTACHMENTS
- UPG_CP_LONG_AET

APPENDIX E

Upgrading the Content Provider Registry

This appendix discusses:

- Understanding Content Provider Registry Upgrade
- Copying Your Portal Solutions Database
- Upgrading PeopleTools for Portal Solutions
- Updating Registry Permission Lists
- Creating the Portal Project
- Comparing the Portal Project
- Reviewing the Portal Project
- Copying the Portal Project
- Copying the Portal Project to Production
- Deleting Obsolete Folders
- Updating Registry Folder Permissions

Understanding Content Provider Registry Upgrade

You should perform this task if you use PeopleSoft Portal Solutions 8.4 or later running on PeopleSoft PeopleTools 8.50 or later with the full navigation load access method. This means that you do not use a single link to access your content provider database, but instead load some or all of the portal registry structures from the content provider database into your PeopleSoft Portal Solutions database. Oracle refers to its application databases that contain the transaction content as Content Provider databases. Your Copy of Production database is your Content Provider database for this task.

When you upgrade a content provider database, the registry structures are updated, removed, and added. These changes need to be copied to the PeopleSoft Portal Solutions database. This task will update the portal registry structures in your PeopleSoft Portal Solutions database to match what is in the Content Provider database. This is accomplished by the following:

- Upgrade the PeopleSoft PeopleTools on a copy of the PeopleSoft Portal Solutions database.

  This allows a project compare to run between the PeopleSoft Portal Solutions and the Content Provider database.

- Create a portal project in the PeopleSoft Portal Solutions database containing all of the existing Content Provider registry structures.

  Copy the portal project (definition only) to the Content Provider database.

- Create a portal project in the Content Provider database containing all of the current Content Provider registry structures, then merge the project definition copied from the PeopleSoft Portal Solutions database into this project.

  You will have a complete list of all registry structures for the Content Provider, including what is current and what should be deleted.
- Compare the complete list of registry structures in the Content Provider database to what exists in the PeopleSoft Portal Solutions, using project compare.

  This marks the missing registry structures as *delete* and the updated or added registry structures as *copy* in the portal project definition.
- Copy the portal project from the Content Provider database to the PeopleSoft Portal Solutions database.

  This deletes, updates, and adds registry structures to the PeopleSoft Portal Solutions database, which syncs it up with what is current in the Content Provider database.

If you use PeopleSoft Portal Solutions 8 SP2, Oracle recommends that you upgrade your PeopleSoft Portal Solutions to the latest available release.

If you do upgrade your PeopleSoft Portal Solutions database, you must be on PeopleSoft PeopleTools 8.46 or later.

Note. If you use PeopleSoft Portal Solutions 8.4 you *do not* need to upgrade to PeopleSoft Portal Solutions 8.8. You can still upgrade to PeopleSoft PeopleTools 8.46 or later.

See Enterprise Portal 8.1x – Managing Information Architecture for additional information on this topic. Go to My Oracle Support and search for Enterprise Portal 8.1x – Managing Information Architecture.

In this appendix, you load your new Portal Registry definitions from your Copy of Production database to a copy of your PeopleSoft Portal Solutions database.

Note. You must complete the tasks in the appendix for each of your separately installed PeopleSoft Portal Solutions databases that correspond to one of the four Portal Registry definitions: EMPLOYEE, CUSTOMER, SUPPLIER, and PARTNER. If your installed PeopleSoft Portal Solutions uses all the registries, then complete this task for each of the portal registries using the same copy of the single PeopleSoft Portal Solutions database.

In the first task of this appendix, you create a copy of your PeopleSoft Portal Solutions database. You use this copy for all subsequent steps for the initial and test Move to Production upgrade passes. For the final Move to Production, do not make a copy. Instead perform the steps on the production PeopleSoft Portal Solutions database.

This document uses the term “target PeopleSoft Portal Solutions database” to refer to the PeopleSoft Portal Solutions database used in the upgrade steps.

Use the following table to determine the correct version of your PeopleSoft Portal Solutions database for each upgrade pass:

Upgrade Pass	Target PeopleSoft Portal Solutions Database
Initial pass	Copy of the PeopleSoft Portal Solutions database
Test Move to Production	Copy of the PeopleSoft Portal Solutions database
Final Move to Production	PeopleSoft Portal Solutions production database

Task E-1: Copying Your Portal Solutions Database

You initially upgrade the Content Provider registry on a copy of your PeopleSoft Portal Solutions database, then test the results of the upgrade. During your test Move to Production, you perform this task against another Copy of the PeopleSoft Portal Solutions.

Create a copy of your current PeopleSoft Portal Solutions production database now. Use this database as your target PeopleSoft Portal Solutions database.

Note. During your final Move to Production, you copy the registry definitions directly to your PeopleSoft Portal Solutions production database. Therefore, you do not need to execute this step during your final Move to Production.

Task E-2: Upgrading PeopleTools for Portal Solutions

During the initial upgrade pass, your PeopleSoft Portal Solutions database must run on the same PeopleSoft PeopleTools release level as your Copy of Production database so that you can do the compare step. Because you do not need to run the compare step during your Move to Production passes, you can skip this task during Move to Production passes.

If the release level of PeopleSoft PeopleTools on your target PeopleSoft Portal Solutions database is not the same as your Copy of Production database release level, upgrade your PeopleSoft PeopleTools now.

Go to My Oracle Support and search for the PeopleSoft PeopleTools upgrade documentation for the new release.

Task E-3: Updating Registry Permission Lists

This section discusses:

- Understanding Registry Permission List Updates
- Updating the Portal Registry
- Deleting the Database Cache

Understanding Registry Permission List Updates

This task applies only to the initial upgrade pass.

Earlier in this upgrade you copied portal registry data from the Demo database to your Copy of Production database. You must update this registry data to include your permission list changes. After updating the portal registry permission lists, delete the database cache.

This process takes between a few minutes and a few hours, depending on the volume of the portal data.

Note. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

Note. You must have a process scheduler started for your Copy of Production database.

Task E-3-1: Updating the Portal Registry

Follow the steps below to update your portal registry permission lists.

To update the portal registry permission lists:

1. On your Copy of Production database, select PeopleTools, Portal, Portal Security Sync.
2. Select the Add a New Value tab.
3. Add a run control as follows:
   a. Enter a value for the run control ID. The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER).
   b. Click Add.
4. Enter a value for the portal name.

   This value must match the portal registry name that you used to replace the *XXXX* in the run control ID.
5. Click Save.
6. Click Run.
7. Set up the process scheduler information and click OK.
8. Click the Process Monitor link to view the progress of the process.

Task E-3-2: Deleting the Database Cache

Follow the steps below to delete the database cache.

To delete the database cache:

1. Delete the Copy of Production database application server cache.
2. Stop and restart the Copy of Production database web server service.

Task E-4: Creating the Portal Project

This section discusses:

- Understanding Portal Project Creation
- Creating the Target Portal Solutions Project
- Cleaning the Target Portal Solutions Project
- Deleting the Target Portal Solutions Database Cache
- Copying the Target Portal Solutions Project Definition
- Creating the Copy of Production Portal Project
- Cleaning the Copy of Production Portal Project

- Deleting the Copy of Production Database Cache

Understanding Portal Project Creation

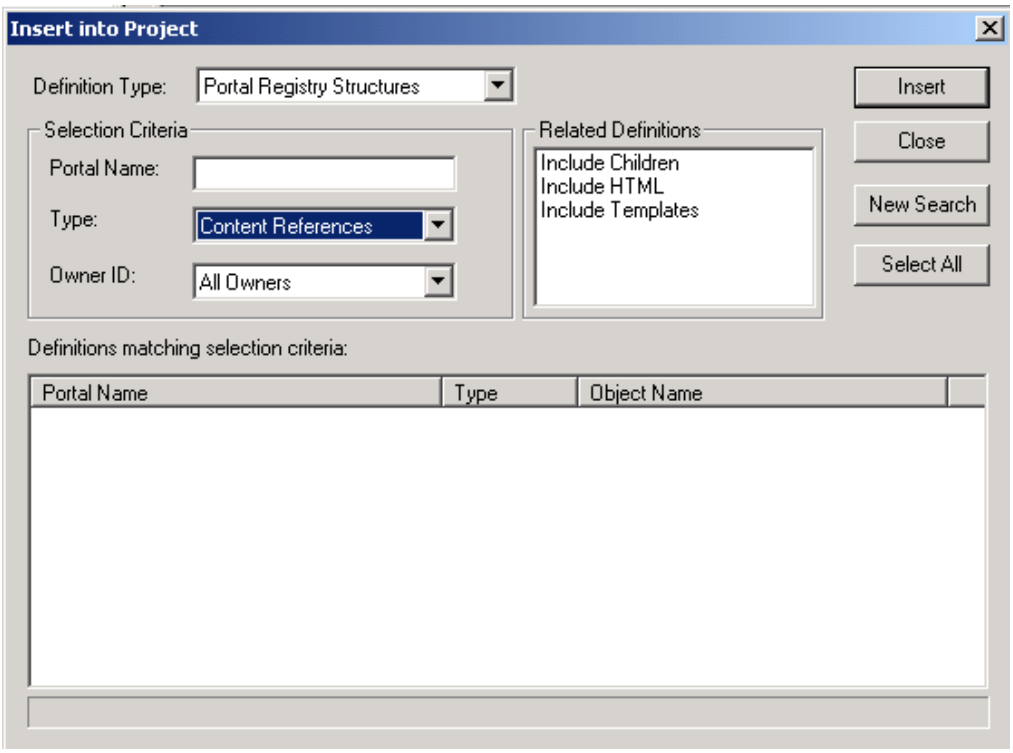
This task applies only to the initial upgrade pass. In this task, you create and modify a project on your target PeopleSoft Portal Solutions database. Then you copy the project definition to the Copy of Production database, where you further modify the project.

Task E-4-1: Creating the Target Portal Solutions Project

Follow the steps below to create the target PeopleSoft Portal Solutions project.

To create the target PeopleSoft Portal Solutions project:

1. Launch PeopleSoft Application Designer and sign in to your target PeopleSoft Portal Solutions database.
2. Select Insert, Definitions into Project…
3. Select the following values on the Insert into Project dialog box, as illustrated by this example:
   a. In the Definition Type field, select *Portal Registry Structures*.
   b. Leave the Portal Name field blank.
   c. In the Owner ID field, select *All Owners*.
   d. Do not select any values in the Related Definitions field, as shown in the following example:



Insert into Project dialog box

4. Click Insert.
5. Click Select All, and then click Insert again
6. Click Close.

7. From PeopleSoft Application Designer, select File, Save Project As….
8. Enter the project name *PORTAL_PA84X_REGISTRY*.
9. Close PeopleSoft Application Designer.

Task E-4-2: Cleaning the Target Portal Solutions Project

In this step, you clean the target PeopleSoft Portal Solutions Project so that it contains only the existing Content Provider registry structure content references.

To clean the target PeopleSoft Portal Solutions project:

1. In your PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.

   Warning! Do not follow the instructions on the Clean Portal Project page. Instead, follow the instructions below.

2. Add the run control ID CLEAN_PORTAL_XXXXXXXX where XXXXXXXX represents the portal definition name: EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER for example.
3. In the Project Name field, enter the project name *PORTAL_PA84X_REGISTRY*.
4. Enter a value in the Portal Name field; *EMPLOYEE* for example.
5. Enter a value in the Content Provider Name field; *CRM* for example.

   Note. Before running the Clean Portal Project you must enter the node URI text for the message node that you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task E-4-3: Deleting the Target Portal Solutions Database Cache

In this step, you delete the target PeopleSoft Portal Solutions database cache.

To delete the target PeopleSoft Portal Solutions database cache:

1. On your target PeopleSoft Portal Solutions database, launch Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the target PeopleSoft Portal Solutions database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task E-4-4: Copying the Target Portal Solutions Project Definition

In this step, you copy the target PeopleSoft Portal Solutions project definition to your Copy of Production database.

To copy the target PeopleSoft Portal Solutions project definition:

1. Using PeopleSoft Data Mover, sign in to your target PeopleSoft Portal Solutions database.
2. Run the following PeopleSoft Data Mover script:

   ```
   PS_APP_HOME\SCRIPTS\UVUPX10E.dms
   ```

3. Close PeopleSoft Data Mover.
4. Using PeopleSoft Data Mover, sign in to the Copy of Production database.
5. Run the following PeopleSoft Data Mover script:

   ```
   PS_APP_HOME\SCRIPTS\UVUPX10I.dms
   ```

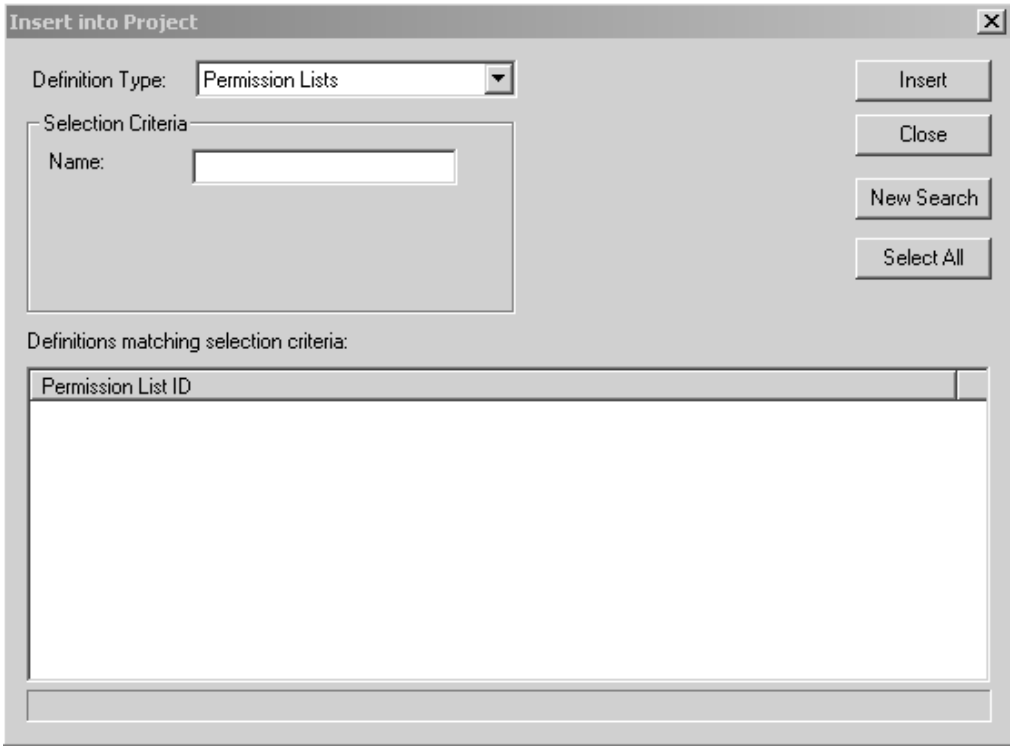
6. Close PeopleSoft Data Mover.

Task E-4-5: Creating the Copy of Production Portal Project

Create a project containing all Portal Registry data on your Copy of Production database.

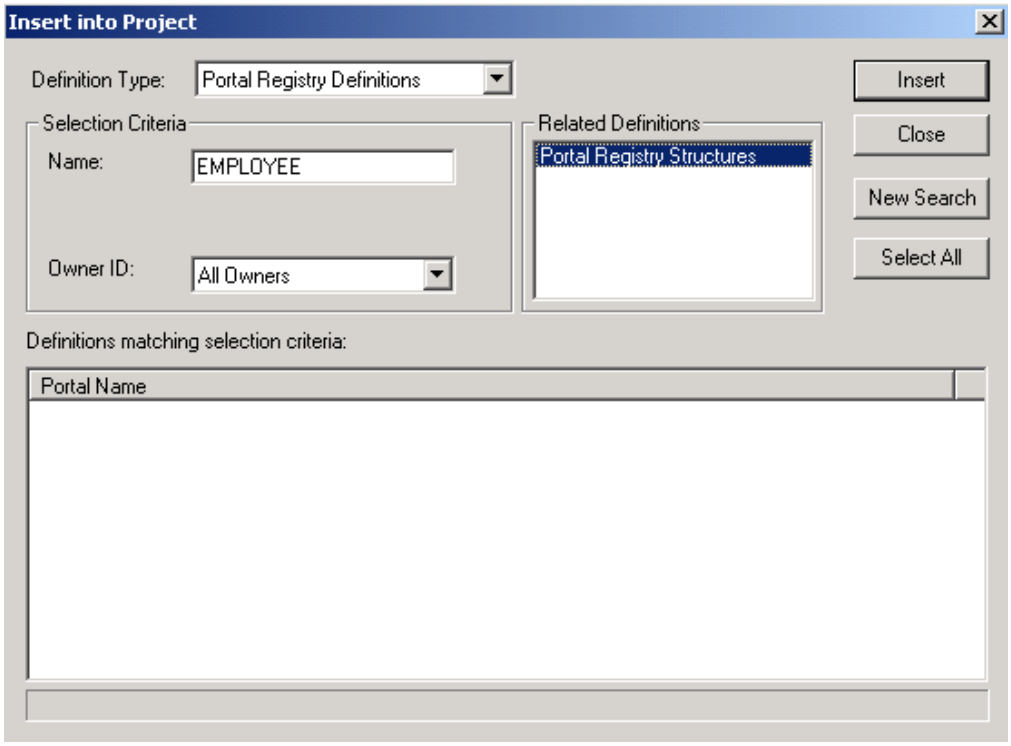
To create the Copy of Production Portal project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Insert, Definitions into Project….
3. In the Definition Type field, select *Permission Lists*, as shown in the following example:



Insert into Project dialog box: Definition Type Permission Lists

4. Click Insert.
5. Click Select All, and then click Insert again.
6. Select the following values, as shown in the example:
   a. In the Definition Type field, select *Portal Registry Definitions.*
   b. In the Name field, enter the PeopleSoft Portal Solutions database's default portal name (EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER).
   c. In the Owner ID field, select *All Owners.*
   d. In the Related Definitions field, select *Portal Registry Structures*, as shown in the following example:



Insert into Project dialog box with Portal Registry Structures selected

7. Click Insert.
8. Click Select All, then click Insert again.
9. Click Close.
10. From PeopleSoft Application Designer, select File, Save Project As….
11. Enter the appropriate new project name.

    Select the project name from the following table, which shows project names for various portal names. This project is referred to as the Portal Project:

Portal Name	Project Name
EMPLOYEE	PORTAL_APP84X_EMPLOYEE
CUSTOMER	PORTAL_APP84X_CUSTOMER
PARTNER	PORTAL_APP84X_PARTNER
SUPPLIER	PORTAL_APP84X_SUPPLIER

12. Click OK.
13. From PeopleSoft Application Designer, select File, Merge Projects...
14. Enter the project name *PORTAL_PA84X_REGISTRY.*

    This merges the objects from the PORTAL_PA84XREGISTERY project into your newly created Portal Project.
15. Select File, Save Project to save the updated Portal Project.
16. Close PeopleSoft Application Designer.

Task E-4-6: Cleaning the Copy of Production Portal Project

In this step, you clean the Copy of Production Portal project so that it contains only the Content Provider registry data.

Important! Before using the Copy of Production Portal project, you must run the Clean Portal Project on the Copy of Production database. Follow the directions on the Clean Portal Project Page.

To clean the Copy of Production Portal project:

1. In your Copy of Production database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.
2. Add the run control ID, *CLEAN_PORTAL_XXXXXXXX*, where *XXXXXXXX* represents the portal definition name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER, for example.
3. In the Project Name field, enter the Portal Project name that you created in the Creating the Copy of Production Portal Project step (PORTAL_APP84X_[your portal name here]).
4. Enter a value in the Portal Name field; *EMPLOYEE*, for example.
5. Enter a value in the Content Provider Name field; *CRM*, for example.

   Important! Before running the Clean Portal Project, you must enter the Node URI text for the Message Node you selected.

   ---

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task E-4-7: Deleting the Copy of Production Database Cache

In this step, you delete the Copy of Production database cache.

To delete the Copy of Production database cache:

1. On your Copy of Production database, start Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the Copy of Production database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task E-5: Comparing the Portal Project

This task applies only to the initial upgrade pass.

In this step, you compare the Portal project that you created in the previous step and then review the compare results. This will enable you to adjust the Portal project as necessary before copying it into the PeopleSoft Portal Solutions database.

To compare the Portal project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Tools, Compare and Report....
3. Enter the Portal project name that you specified in the Creating the Copy of Production Portal Project step (PORTAL_APP84X_[your portal name here]).
4. Enter the database name of your target PeopleSoft Portal Solutions database, and the user ID and password.
5. Click the Options button.
6. In the Compare Type field, select *Project*, and click OK.
7. Select all object types and click OK.
8. Close PeopleSoft Application Designer.

Task E-6: Reviewing the Portal Project

This task applies only to the initial upgrade pass.

Review the Portal project (PORTAL_APP84X_[your portal name here]) on the Copy of Production database, looking for customizations that you have applied to your database. Object definitions that you changed have **Changed* or **Unchanged* in the Target column of the compare report. The asterisk (*) indicates that the change was not made by Oracle. Review each of these objects carefully. If Oracle delivered the object, the Source column of the report will read *Changed*. Note the changes that you made to the object. After you complete the upgrade, when you test the system, you can decide whether you still need the customization. You can reapply the customization at that time.

See Appendix: "Using the Comparison Process."

Task E-7: Copying the Portal Project

This section discusses:

- Understanding Portal Project Copying
- Copying the Portal Project to the Portal Solutions Database
- Deleting the Portal Solutions Database Cache

Understanding Portal Project Copying

This task applies only to the initial upgrade pass.

In this step, you copy the project from your Copy of Production database to your target PeopleSoft Portal Solutions database.

Task E-7-1: Copying the Portal Project to the Portal Solutions Database

Follow the steps below to copy the Portal Project to the PeopleSoft Portal Solutions database.

Important! Before exporting the Portal Project from the Content Provider database, you must successfully clean the Copy of Production Portal Project. If you proceed with this step without cleaning the project, you will overwrite critical PeopleSoft Portal Solutions data.

See Creating the Portal Project, Cleaning the Copy of Production Portal Project.

To copy the Portal Project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select File, Open...
3. In the Definition field, select *Project* and click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To Database...
6. Enter the name of your target PeopleSoft Portal Solutions database, and the user ID and password.
7. Click Select All.
8. Click Copy.

   This may take a few minutes.
9. Close PeopleSoft Application Designer.

Note. You do not need to create or alter any records or views.

Task E-7-2: Deleting the Portal Solutions Database Cache

In this step, you delete the PeopleSoft Portal Solutions database cache.

To delete the PeopleSoft Portal Solutions database cache:

1. Delete the target PeopleSoft Portal Solutions database application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

Task E-8: Copying the Portal Project to Production

This section discusses:

- Understanding Portal Project to Production Copying
- Copying the Portal Project to File
- Copying the Portal Project from File
- Deleting the Portal Solutions Database Cache Again

Understanding Portal Project to Production Copying

You must perform this step during both your test and final Move to Production upgrade passes.

Task E-8-1: Copying the Portal Project to File

Follow the steps below to copy the Portal Project to file.

Note. If your Copy of Production and target PeopleSoft Portal Solutions databases run on the same PeopleSoft PeopleTools release and database platform, you can copy the project directly to the target PeopleSoft Portal Solutions database from within the Copy of Production Application Designer and skip the rest of this step.

To copy the Portal Project to file:

1. Launch PeopleSoft Application Designer and sign in to your Copy Production database.
2. Select File, Open....
3. In the Definition field, select *Project* and then click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To File....
6. Click the Browse button for the Export Directory.
7. Select a temporary directory and then click OK.
8. Click Select All.
9. Click Copy.

   This may take a few minutes.
10. Close PeopleSoft Application Designer.

Task E-8-2: Copying the Portal Project from File

In this step, you copy the Portal Project from file.

To copy the Portal Project from file:

1. Launch PeopleSoft Application Designer and sign in to your target PeopleSoft Portal Solutions database.
2. Select Tools, Copy Project, From File....
3. Browse to the Copy of Production database server's temporary directory.

   If you cannot access the Copy of Production database server's temporary directory, then copy the Portal Project folder and files from the temporary directory to the target PeopleSoft Portal Solutions database server's *PS_APP_HOME*\PROJECTS directory, and browse to that directory.
4. Select the Portal Project name that you just copied to file in the previous step.
5. Click Open.
6. Click Select All.
7. Set the project language options as follows:
   a. Click Options.
   b. In the Copy Options tab, select *English*, and *COMMON*.

c. If your PeopleSoft Portal Solutions database is a multi-language database, then also select the languages that you have installed on your PeopleSoft Portal Solutions database.

d. Click OK.

8. Click Copy.
9. Select the Upgrade tab and view the Output window.

   All objects should have copied successfully.
10. Close PeopleSoft Application Designer.

Note. After the copy, you do not need to create or alter any records or views on the target PeopleSoft Portal Solutions database.

Task E-8-3: Deleting the Portal Solutions Database Cache Again

In this step, you delete the PeopleSoft Portal Solutions database cache.

To delete the PeopleSoft Portal Solutions database cache:

1. Delete the target PeopleSoft Portal Solutions database's application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

Task E-9: Deleting Obsolete Folders

This section discusses:

- Understanding Obsolete Folder Deletion
- Deleting Obsolete Folders on Portal Solutions 8.4
- Deleting Obsolete Folders on Portal Solutions 8.8

Understanding Obsolete Folder Deletion

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

In this step, you delete folders on your target PeopleSoft Portal Solutions database that the Portal Registry Structures no longer reference. The process that you run depends on your version of PeopleSoft Portal Solutions.

Task E-9-1: Deleting Obsolete Folders on Portal Solutions 8.4

Follow this procedure to delete obsolete folders on PeopleSoft Portal Solutions 8.4.

To delete obsolete folders on PeopleSoft Portal Solutions 8.4:

1. Using PeopleSoft Data Mover, sign in to your target PeopleSoft Portal Solutions database.
2. Run the following PeopleSoft Data Mover script, located in the PeopleSoft Portal Solutions PS_APP_HOME\SCRIPTS directory:

   ```
   PORTAL_REG_FOLDER_DEL.DMS
   ```


3. Close PeopleSoft Data Mover.

Task E-9-2: Deleting Obsolete Folders on Portal Solutions 8.8

Follow this procedure to delete obsolete folders on PeopleSoft Portal Solutions 8.8 or higher.

To delete obsolete folders on PeopleSoft Portal Solutions 8.8 or higher:

1. On your target PeopleSoft Portal Solutions database, navigate accordingly:
   a. For PeopleSoft Portal Solutions 8.8: Portal Administration, Navigation, Run Folder Cleanup.
   b. For PeopleSoft Portal Solutions 8.9 or higher: Portal Administration, Navigation, Delete Empty Folders.
2. Add a run control as follows:
   a. Enter a value for the run control ID. The run control ID is *FOLDER_CLEAN_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
   b. Click Add.
3. Enter a value in the Portal Name field.

   This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task E-10: Updating Registry Folder Permissions

This section discusses:

- Understanding Registry Folder Permissions Updates
- Updating Portal Solutions Registry Folder Permissions
- Deleting the Portal Solutions Cache

Understanding Registry Folder Permissions Updates

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, you must update the folder permissions to reflect the changes. After you update the folder permissions, you must delete the target PeopleSoft Portal Solutions database cache files to propagate the changes.

Task E-10-1: Updating Portal Solutions Registry Folder Permissions

Follow this procedure to update your PeopleSoft Portal Solutions registry folder permissions.

Note. This process will take between a few minutes to a few hours, depending on the volume of portal data. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

To update the PeopleSoft Portal Solutions folder permissions:

1. On your target PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Security Sync.
2. Add a run control as follows:
   a. Enter a value for the run control ID.

      The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).

   b. Click Add.
3. Enter a value in the Portal Name field.

   This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task E-10-2: Deleting the Portal Solutions Cache

In this step delete the PeopleSoft Portal Solutions cache.

To delete the PeopleSoft Portal Solutions cache:

1. Delete the target PeopleSoft Portal Solutions database application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

APPENDIX F

Using Data Conversion Utilities

This appendix discusses:

- Understanding Data Conversion Utilities
- Using the UPGDATACONV Process
- Using the EO Upgrade Framework Process
- Using the Upgrade Driver Program
- Using the Upgrade Drivers Page

Understanding Data Conversion Utilities

The Upgrade Data Conversion Application Engine Programs are organized into a series of Drivers or Groups that guide the flow and order of execution at runtime for a particular upgrade path. This appendix contains information regarding the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table.

This appendix also contains information regarding the EO Upgrade Framework. The EOUF process consists of two Application Engine programs and is intended to optimize the data conversion process by analyzing Source and Target tables, column usage, state records, and bind variables to determine actual dependencies between Application Engine sections. This allows you to run your data conversion process during your PeopleSoft application upgrade with optimal performance.

Task F-1: Using the UPGDATACONV Process

This section discusses:

- Understanding the UPGDATACONV Process
- Reviewing the Data Conversion Report

Understanding the UPGDATACONV Process

To run all PRE and POST data conversions, Oracle has provided the Application Engine program UPG_DATACONV. This program runs the Application Engine sections defined in the table PS_UPG_DATACONV.

Task F-1-1: Reviewing the Data Conversion Report

Each of the upgrade data conversion sections contains comments that describe the processing performed by the section. Oracle delivered an SQR to list all of these comments by the group and sequence numbers that determine how they run. The name of this report is UDATACNV.

To run UDATACNV:

1. Using SQRW, run SQR UDATACNV on your Copy of Production database.
2. When prompted for upgrade path, enter:

   `F881`

3. When prompted for group number, enter the two-digit group number to report on, or enter *0* to see the comments for all groups.

Task F-2: Using the EO Upgrade Framework Process

This section discusses:

- Understanding the EO Upgrade Framework Process
- Reviewing EO Upgrade Framework Initial Analysis
- Reviewing Dependency Analysis
- Reviewing Runtime for EOUFDATACONV
- Reviewing EO Upgrade Framework Reporting

Task F-2-1: Understanding the EO Upgrade Framework Process

With the PeopleSoft 9.1 application release, EOUF was introduced as the new Upgrade Data Conversion Framework. This new framework allows the Application Engine (AE) data conversion to run out of the box on a number of threads instead of the previous single threaded approach.

The EOUF process uses many pieces of the previous style data conversion delivered in PeopleSoft 9.0 applications and lower. For example, the EOUF process uses the AE section grouping and sequencing in the PS_UPG_DATACONV table for its dependency modeling. With the introduction of EOUF, we have also introduced new terminology – *root or top section*. A *root or top section* is an AE section defined in PS_UPG_DATACONV. We use *root or top section* to distinguish between sections being called from the data conversion program as opposed to sections being called from an AE call section step.

The EOUF process includes analyzing the insert, update, and delete SQL steps in your data conversion to determine the Source and Target tables, column usage, stat records, and bind variables that are used. This includes analyzing dynamic SQL, App Classes, SQLExec's, and platform-specific code.

The AE program gathers a list of AE sections required for data conversion from a given upgrade path. These sections are analyzed and SQL statements are extracted and stored in the AE Analyzer repository. Each SQL statement is analyzed to derive a list of tables that are manipulated or queried during the execution of that SQL. Once all the SQL is analyzed, the information is used to derive section dependency information, which is then saved in the AE Analyzer repository.

There are two types of analysis for EOUF: initial and dependency. This section will describe both analysis types in detail.

Task F-2-2: Reviewing EO Upgrade Framework Initial Analysis

This section discusses:

- Understanding Initial Analysis
- Reviewing Data Conversion Query Parsing
- Reviewing Custom Data Conversion Code
- Reviewing Table Usage Information
- Reviewing Invalid SQL
- Reviewing the Data Conversion Repositories

Understanding Initial Analysis

The first part of the new EOUF process is the EOUFANALYSIS Application Engine, also known as the AE Analyzer. EOUFANALYSIS accepts one parameter for the upgrade path, and then queries PS_UPG_DATACONV to retrieve all the groups and sections for that upgrade path, ordering by group and sequence. Starting with the first group and first sequence, EOUFANALYSIS parses each AE section definition following the flow from step to step and through any nested call sections. As it follows the flow, it inserts rows into the PS_EOUF_ANALYSIS table for each AE Section, Step, and Action it comes across. EOUFANALYSIS maintains a counter as it goes and increments the counter as it writes each Action to the PS_EOUF_ANALYSIS table. By the end of this first task, the PS_EOUF_ANALYSIS table will describe the entire upgrade from top to bottom, from the first AE section in the first Upgrade Group to the last section in the last Upgrade Group. By querying the PS_EOUF_ANALYSIS table and ordering by EOUF_AESTMTSEQ, the whole will be described, including any nested call sections.

It is important to note that the PS_EOUF_ANALYSIS table contains every actual Step in the chosen upgrade path. During the data conversion runtime phase, it is likely that not all these steps will be executed because specific data composition and various application options will prevent some sections or steps from running. With the new EOUF process, data composition can affect the data conversion runtime flow, which makes it impossible to predetermine the exact runtime flow the conversion will follow.

The EOUFANALYSIS AE reads the data conversion code for your defined upgrade path (where the path is defined in the UPGDATACONV table with UPG_CONV_TYPE= “MAIN”).

The AE Analyzer program leverages two PeopleCode functions included with PeopleSoft PeopleTools 8.50 or higher. The two PeopleCode functions are:

- GetProgText: A function that retrieves a PeopleCode program as text.
- ResolveMetaSQL: A function that returns a string of SQL text that has had its metasql resolved.

Reviewing Data Conversion Query Parsing

After EOUFANALYSIS determines the upgrade path flow, it traverses the flow again looking at all the different Step Actions to determine which SQL is being executed by that Step. Most action types are straightforward; SQL, Do Select. PeopleCode is the most complicated action type. A Java program parses the PeopleCode and pulls all the SQL executed in the PeopleCode. The results of the action type analysis end up in a table called PS_EOUF_DTLIDSQLS, which stores a reference to PS_EOUF_ANALYSIS, along with the SQL statements associated with each Step Action. In the case of PeopleCode, there may be many rows in the PS_EOUF_DTLIDSQLS table for each PeopleCode reference in PS_EOUF_ANALYSIS. In addition, a second shadow table, called PS_EOUF_DTLIDSQLSR, is also populated during action type analysis. The only difference between PS_EOUF_DTLIDSQLS and PS_EOUF_DTLIDSQLSR is that PS_EOUF_DTLIDSQLSR contains the fully resolved SQL statements. For example, if the original SQL in a Step was:

```
UPDATE PS_BEN_DEFN_COST SET RATE_TBL_ID =
```



```
%Substring(%Sql(UPG_HC_221,RATE_TBL_ID),1,4) %Concat '-2'
WHERE RATE_TYPE='2' AND RATE_TBL_ID IN ( SELECT RATE_TBL_ID FROM
PS_UPG_BN_RATES WHERE RATE_TYPE='2')
```

Then this would be resolved to platform-specific SQL. In the case of SQLServer it would be:

```
UPDATE PS_BEN_DEFN_COST SET RATE_TBL_ID =
SUBSTRING(RTRIM(RATE_TBL_ID),1,4) + '-2' WHERE RATE_TYPE='2' AND
RATE_TBL_ID IN ( SELECT RATE_TBL_ID FROM PS_UPG_BN_RATES
WHERE RATE_TYPE='2')
```

Each of these SQL statements is further parsed to determine the tables that participate in the query. The results are stored in the PS_EOUF_DTLIDTBLS table. A query can have zero or one target tables. If the query is an INSERT, UPDATE, DELETE, etc, then there will be one target. If the query is a select statement, then there will be no target table. For the previously stated query, you would expect to see 2 rows in the PS_EOUF_DTLIDTBLS table. The first row would be for the PS_BEN_DEFN_COST table with an EOUF_TABLEUSAGE value of *T* because it is the target table of the query. The second row would be for the PS_UPG_BN_RATES table with an EOUF_TABLEUSAGE value of *S* because it is a source table in the query.

At this point we have gathered all the information we need about the specific upgrade path to build a dependency model. The dependency model is solely based on which tables are affected by which steps and follows some very simple rules. Most of these rules are inherent in the Upgrade Group model of the old PS_UPG_DATACONV process.

Reviewing Custom Data Conversion Code

You can include custom data conversion code in the Initial Analysis and subsequent steps in the EOUF process by adding a row (or rows) to the PS_UPG_DATACONV table for each custom AE section that is to be executed, where a row is defined as UPG_PATH, UPG_GROUP_SEQ_NUM, SEQ_NUM, AE_APPLID, AE_SECTION, ACTIVE_FLAG, UPG_CONV_TYPE.

Reviewing Table Usage Information

The data conversion analysis process attempts not only to identify the tables that are used in a given Application Engine step, but also how the tables are being used in the context of each step.

This information is stored in the analysis tables and documented in the Table Usage and Action columns of delivered EOUF reports, such as EOUF0001.SQR.

Valid values for the Table Usage column are:

- *S* for Data Source
- *T* for Data Target
- *X* for Unknown

Note. An *X* value in the Table Usage column for the PS_EOUF_DUAL, PS_EOUF_COMMON_AET, PS_EOUF_DUMMY, or PS_EOUF_NORECNAME tables is expected and does not impact the subsequent Dependency Analysis Process.

See Reviewing Dependency Analysis.

Valid values for the Action column are:

- CREATE
- DELETE

- DROP
- INSERT
- SELECT
- TRUNCATE
- UPDATE
- UPDSTATS
- UNKNOWN
- OTHER

A valid value for the action "Unknown" is only applicable to PeopleCode steps and only occurs in instances when the parser encounters syntax such as `getrecord, getrowset, createrecord,` or `createrowset,` and cannot determine which actions were being done against the variable.

A valid value for the action "Other" occurs in instances when the parser encounters syntax such as the "Invalid SQL Override" or other non-SQL statements such as application function calls.

See Reviewing Invalid SQL

Reviewing Invalid SQL

The data conversion analysis process may mark certain SQL statements as invalid. This designation refers to SQL statements that the AE Analysis process could not correctly process. When a SQL statement is marked invalid, there are three options that you can use:

- Modify the SQL so that the AE Analyzer can process the statement. The following table compares sample invalid and valid SQL statements:

Invalid SQL	Valid SQL
UPDATE %Table(%BIND(RECNAME)) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D')	• UPDATE %TABLE(BN_834_MEMBER) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D') • UPDATE %TABLE(DEP_BEN_EFF) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D') • UPDATE %Table(EMERGENCY_CNTCT) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D')

- For invalid SQL statements in PeopleCode, add an override line directly above the invalid SQL to manually document the Source and Target tables that are in use.

Note. There is no override option for Application Engine SQL steps that are marked as invalid.

Note. Entering inaccurate or incomplete information in the override statement may result in data conversion sections being run in the incorrect dependent order, which can produce incorrect conversion results, such as data errors.

Note. Tables defined in the override statement require the *PS_* prefix.

Correct = PS_JOB

Incorrect = JOB

The following table gives sample override lines for various situations:

Syntax	Sample Override Lines
When Source and Target tables are explicitly known and static	For example: • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:<SRC Table>,<SRC Table>; • REM SQLANALYSIS:T::S:<SRC Table>,<SRC Table>; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:;

Syntax	Sample Override Lines
When Source and/or Target Tables are determined based on a query	For example: • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:[table name]; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T::S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:; Where: *SQLid*: Specify the name of an existing SQL definition. *paramlist*: Specify a list of arguments for dynamic substitutions at runtime. The first argument replaces all occurrences of %P(1) in the referenced SQL definition, the second argument replaces %P(2), and so forth. **Note.** The paramlist arguments must be static values. Variable values in the parmlist are not permitted. **Note.** The Query is resolved at the time the Data Conversion Analysis is executed. It is NOT resolved during the Data Conversion Runtime. **Note.** The Query must return one or more valid RECNAME values. No other return results are permitted.
Where there is no Source or Target table to be defined an/or the invalid SQL is to be excluded from the table and dependency analysis.	REM SQLANALYSIS:T::S:PS_EOUF_NORECNAME; **Note.** The "REM SQLANALYSIS:T::S:;" syntax is not a valid override and will be marked as "Invalid" by the EOUFANALYSIS Program.

- Leave the SQL as it is. This results in the invalid SQL being marked as "dependent" on all steps that exist prior to it, and all steps subsequent to the invalid SQL become dependent on it.

Note. This will likely result in slowing the runtime of data conversion and is *not* recommended.

Reviewing the Data Conversion Repositories

The tables in the Data Conversion Analysis repository hold the following data:

- Step actions stored in execution order.
- SQL clauses extracted from step actions.
- Tables featured in SQL clause.
- Bind variables used in SQL.

Analysis information is stored in the following tables:

- PS_UPG_DATACONV
- PS_EOUF_ANALYSIS
- PS_EOUF_DATACONV
- PS_EOUF_DTLIDSQLS
- PS_EOUF_DTLIDSQLSR
- PS_EOUF_DTLIDTBLS
- PS_EOUF_RUNDEPEND
- PS_EOUF_SECDEPEND
- PS_EOUF_SECLISTTMP
- PS_EOUF_STEPDEPEND

The following Analysis tables make up the EO Upgrade Framework:

- PS_EOUF_DATACONV

  The PS_EOUF_DATACONV table is based on the table definition for PS_UPG_DATACONV. It stores the upgrade AE sections for the chosen upgrade path.

COLUMN	DESCRIPTION
UPG_PATH	Upgrade Path Copied from PS_UPG_DATACONV
UPG_GROUP_SEQ_NUM	Upgrade Group Copied from PS_UPG_DATACONV
SEQ_NUM	Upgrade Sequence Copied from PS_UPG_DATACONV
AE_APPLID	Upgrade Application Engine Copied from PS_UPG_DATACONV
AE_SECTION	Upgrade Application Engine Section Copied from PS_UPG_DATACONV
ACTIVE_FLAG	Active Flag Copied from PS_UPG_DATACONV
EOUF_RUNDURATION	Elapsed time for this section to run during data conversion
RUN_STATUS_FLAG	Run Status Flag (Y-complete, N-not run yet, R-Running, F-Failed)
EOUF_GUID	GUID generated by the Data Conversion runtime engine

- PS_EOUF_ANALYSIS

  This is the main analysis table. The AE Analyzer (EOUFANALYSIS) writes a row to this table for every Action in each Root Section of the specified upgrade path.

COLUMN	DESCRIPTION
UPG_PATH	Upgrade Path Copied from PS_UPG_DATACONV
UPG_GROUP_SEQ_NUM	Upgrade Group Copied from PS_UPG_DATACONV
SEQ_NUM	Upgrade Sequence Copied from PS_UPG_DATACONV
EOUF_TOPAEAPPLID	Upgrade Application Engine Copied from PS_UPG_DATACONV

COLUMN	DESCRIPTION
EOUF_TOPAESECTN	Upgrade Application Engine Section Copied from PS_UPG_DATACONV
EOUF_TOPAESTEP	Upgrade Section Step
EOUF_TOPAESEQNUM	Upgrade Section Sequence Number
EOUF_AELEVEL	Nesting level for Call Section
AE_APPLID	Actual AE Program (same as EOUF_TOPAEAPPLID if EOUF_AELEVEL is 1)
AE_SECTION	Actual Section (same as EOUF_TOPAESECTN if EOUF_AELEVEL is 1)
AE_STEP	Actual Step (same as EOUF_TOPAESTEP if EOUF_AELEVEL is 1)
AE_SEQ_NUM	Actual Seq Num (same as EOUF_TOPAESEQNUM if EOUF_AELEVEL is 1)
MARKET	Market
DBTYPE	DBType
AE_DO_SECTION	If Step Action is Call Section, then this is the section to be called
AE_DO_APPL_ID	If Step Action is Call Section, then this is the program to be called
AE_DYNAMIC_DO	Indicates the Call Section is a dynamic call section
STEP_DESCR	Step Description
AE_STMT_TYPE	Action Type e.g. S-SQL, P-PeopleCode, D-DoSelect, H-DoWhen etc
EOUF_STMTTYPENUM	Numeric identified for AE_STMT_TYPE (used for ordering step actions)
EOUF_AESTMTSEQ	Sequence used to order the steps actions for the whole upgrade
AE_REUSE_STMT	Standard AE Reuse Statement flag
AE_DO_SELECT_TYPE	Standard AE Do Select Type
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_INFO1	Extra Information mostly related to FUNCLIB calls
EOUF_INFO2	Extra Information mostly related to FUNCLIB calls
EOUF_INFO3	Extra Information mostly related to FUNCLIB calls
EOUF_INFO4	Extra Information mostly related to FUNCLIB calls
EOUF_INFO5	Extra Information mostly related to FUNCLIB calls
SQLID	For SQL step, the SQLID of the SQL this step action executes
EOUF_CHUNKSEQ	Statement Chunk Sequence
EOUF_STMTDESCR	Description copied from AE Step Description
EOUF_HASPARENTS	This Step has dependencies on other one or more other Steps
EOUF_HASCHILDREN	One or more other Steps have a dependency on this step

COLUMN	DESCRIPTION
EOUF_HASWHERE	The SQL has a where clause – Mostly used by PeopleSoft Development
EOUF_TEXTCHUNK	Statement executed by this Step.

- PS_EOUF_DTLIDSQLS

  This table holds a reference to every SQL in the conversion code for the specified upgrade path.

COLUMN	DESCRIPTION
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_SQLNUM	SQL Number, for peoplecode there may be many SQL statements
EOUF_AESTMTLEN	Length of the text of the SQL statement
EOUF_OBJ_TYPE	S-SQL or P-PeopleCode
EOUF_CHUNKSEQ	Statement Chunk Sequence
TABLE_NAME	Main Table in the SQL Statement, Blank if SQL is SELECT with many tables
EOUF_DMLACTION	INSERT, UPDATE, DELETE, SELECT etc
EOUF_LINENUM	Refers to the PeopleCode line number where the SQL is defined
EOUF_VALIDSQL	Internal Identifier to indicate a piece of SQL than can or cannot be parsed
DESCR254	Description Column
EOUF_PARAMCLAUSE	Bind variable used in the SQL
EOUF_INFO1	Extra Information mostly related to FUNCLIB calls
EOUF_INFO2	Extra Information mostly related to FUNCLIB calls
EOUF_INFO3	Extra Information mostly related to FUNCLIB calls
EOUF_INFO4	Extra Information mostly related to FUNCLIB calls
EOUF_INFO5	Extra Information mostly related to FUNCLIB calls
EOUF_TEXTCHUNK	Statement executed by this Step

- PS_EOUF_DTLIDSQLSR

  This table differs slightly from the PS_EOUF_DTLIDSQLS table in that the SQL statement has been fully resolved into platform-specific SQL. This makes it much easier to see what is happening in the SQL

COLUMN	DESCRIPTION
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_SQLNUM	SQL Number, for PeopleCode there may be many SQL statements
EOUF_CHUNKSEQ	Statement Chunk Sequence
EOUF_TEXTCHUNK	Statement executed by this Step

- PS_EOUF_DTLIDTBLS

This table holds a reference to every SQL in the conversion code for the specified upgrade path and which Tables or Records are in use for each piece of SQL.

COLUMN	DESCRIPTION
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_SQLNUM	SQL Number, for peoplecode there may be many SQL statements
RECNAME	Record Name
TABLE_NAME	Associated Table Name
EOUF_TABLEUSAGE	T-Target, S-Source
EOUF_TABLETYPE	R-Record, S-State Record, U-Upgrade Table, V-View, T-TempTable
EOUF_INFO1	Extra Information mostly related to FUNCLIB calls
EOUF_INFO2	Extra Information mostly related to FUNCLIB calls
EOUF_INFO3	Extra Information mostly related to FUNCLIB calls
EOUF_INFO4	Extra Information mostly related to FUNCLIB calls
EOUF_INFO5	Extra Information mostly related to FUNCLIB calls

- PS_EOUF_STEPDEPEND

  By querying PS_EOUF_DTLIDTBLS and PS_EOUF_ANALYSIS, it is possible to determine which steps have dependencies and what those dependencies are.

COLUMN	DESCRIPTION
EOUF_P_GRPSEQNUM	Parent Data Conversion Group Number
EOUF_P_SEQNUM	Parent AE Section Sequence Number
EOUF_P_TOPAEAPPLID	Parent Data Conversion AE Program
EOUF_P_TOPAESECTN	Parent Data Conversion AE Section
EOUF_P_TOPAESTEP	Parent Data Conversion AE Step
EOUF_P_TOPAESEQNUM	Parent Data Conversion AE Step Sequence
EOUF_P_AEAPPLID	Parent AE Program
EOUF_P_AESECTION	Parent AE Section
EOUF_P_AESTEP	Parent AE Step
EOUF_P_AESEQNUM	Parent AE Step Sequence within the Section
EOUF_P_AESTMTSEQ	Parent AE Step Sequence across whole upgrade
EOUF_P_DETAILID	Parent AE Step Detail ID
EOUF_P_SQLNUM	Parent AE Detail ID SQL Sequence
EOUF_C_GRPSEQNUM	Child Data Conversion Group Number
EOUF_C_SEQNUM	Child AE Section Sequence Number
EOUF_C_TOPAEAPPLID	Child Data Conversion AE Program
EOUF_C_TOPAESECTN	Child Data Conversion AE Section
EOUF_C_TOPAESTEP	Child Data Conversion AE Step

COLUMN	DESCRIPTION
EOUF_C_TOPAESEQNUM	Child Data Conversion AE Step Sequence
EOUF_C_AEAPPLID	Child AE Program
EOUF_C_AESECTION	Child AE Section
EOUF_C_AESTEP	Child AE Step
EOUF_C_AESEQNUM	Child AE Step Sequence within the Section
EOUF_C_AESTMTSEQ	Child AE Step Sequence across whole upgrade
EOUF_C_DETAILID	Child AE Step Detail ID
EOUF_C_SQLNUM	Child AE Detail ID SQL Sequence
EOUF_TABLENAME	Common table referenced by the parent and child step
EOUF_P_TABLEUSAGE	Parent table usage T-Target, S-Source
EOUF_C_TABLEUSAGE	Child table usage T-Target, S-Source

- PS_EOUF_ SECDEPEND

  This table is an aggregation of PS_EOUF_STEPDEPEND to the Section level.

COLUMN	DESCRIPTION
EOUF_P_GRPSEQNUM	Parent Data Conversion Group Number
EOUF_P_TOPSEQNUM	Parent AE Section Sequence Number
EOUF_P_TOPAEAPPLID	Parent Data Conversion AE Program
EOUF_P_TOPAESECTN	Parent Data Conversion AE Section
EOUF_P_AESTMTSEQ	Parent AE Step Sequence across whole upgrade
EOUF_C_GRPSEQNUM	Child Data Conversion Group Number
EOUF_C_TOPSEQNUM	Child AE Section Sequence Number
EOUF_C_TOPAEAPPLID	Child Data Conversion AE Program
EOUF_C_TOPAESECTN	Child Data Conversion AE Section
EOUF_C_AESTMTSEQ	Child AE Step Sequence across whole upgrade
EOUF_DEPENDSOURCE	Dependency Rule
EOUF_DEPENDRULE	DEPENDENT or INDEPENDENT

- PS_EOUF_RUNDEPEND

  This table represents the section dependency model. You can query this table for any given data conversion AE Section to determine what it depends on and what depends on it. The runtime data conversion Application Engine (EOUFDATACONV) uses this table to determine which sections are eligible to run.

COLUMN	DESCRIPTION
EOUF_P_GRPSEQNUM	Parent Data Conversion Group Number
EOUF_P_TOPSEQNUM	Parent AE Section Sequence Number
EOUF_P_TOPAEAPPLID	Parent Data Conversion AE Program
EOUF_P_TOPAESECTN	Parent Data Conversion AE Section
EOUF_C_GRPSEQNUM	Child Data Conversion Group Number
EOUF_C_TOPSEQNUM	Child AE Section Sequence Number
EOUF_C_TOPAEAPPLID	Child Data Conversion AE Program

COLUMN	DESCRIPTION
EOUF_C_TOPAESECTN	Child Data Conversion AE Section
EOUF_DEPTH	Dependency Nesting

Task F-2-3: Reviewing Dependency Analysis

This section discusses:

- Understanding Dependency Analysis
- Reviewing Data Conversion Runtime Rules
- Reviewing Dependency Modeling

Understanding Dependency Analysis

The table usage information identified in the Initial Analysis is subsequently used to determine the dependencies between AE Steps. The Step Dependency Information is then aggregated to the "Root Section" level where a Root Section is defined as a row in the PS_UPG_DATACONV table (UPG_PATH, UPG_GROUP_SEQ_NUM, SEQ_NUM, AE_APPLID, AE_SECTION, ACTIVE_FLAG, UPG_CONV_TYPE).

Reviewing Data Conversion Runtime Rules

The runtime rules of the old UPG_DATACONV Application Engine process are rolled forward into the new EOUF Framework.

The following rules were the previous data conversion runtime rules:

- All Upgrade Groups are dependent on Upgrade Group 1 having been successfully completed.
- Application Engine Sections within an Upgrade Group run sequentially according to Sequence Number.
- After the successful completion of Upgrade Group 1, all other Upgrade Groups could run in parallel depending on the customer setup.
- A failure of a Section with an Upgrade Group prevents subsequent Sections from running until the failure is fixed.

The following rules are the new data conversion runtime rules:

- Dependencies are derived from tables referenced in SQL or PeopleCode actions in Upgrade Sections.
- Dependencies follow the Upgrade Group sequencing. If Section ABC in Upgrade Group 1 updates a given table, then any Section assigned a higher sequence than ABC that updates or queries that same table cannot run until Section ABC is complete.
- Upgrade Groups 2 and higher have no dependency on each other. If Section QWE in Upgrade Group 2 updates table FFF and Section ASD in Upgrade Group 3 also updates table FFF, there is no dependency created.
- Upgrade Groups 2 and higher create dependencies on Sections in their own Upgrade Group and in Upgrade Group 1. If Section ABC in Upgrade Group 1 updates table FFF and Section QWE in Upgrade Group 2 also updates table FFF, then Section QWE becomes dependent on Section ABC.
- Tables as sources do not create dependencies. If Section ZXC in Upgrade Group 1 selects from table FFF, and then Section BNM in Upgrade Group 1 also selects from table FFF, no dependency is created.
- If a Section has a SQL statement that EOUFANALYSIS cannot understand, the SQL is flagged as invalid from the parser point of view (the Data Conversion will still run fine) and a hard dependency is created. This means for every Section with a query that cannot be parsed, it becomes dependent on every Section

sequentially above it in its Upgrade Group, and on every Section in Upgrade Group 1. Furthermore, every Section sequentially afterward becomes dependent on it.

- Usage of the PS_EOUF_DUAL, PS_EOUF_COMMON_AET, PS_EOUF_DUMMY, or PS_EOUF_NORECNAME tables never results in a dependency.

Reviewing Dependency Modeling

The following table shows how the dependency modeling works. From PS_UPG_DATACONV, we take a section to be run during HC 8.9 to 9.1 data conversion.

UPG_PATH	UPG_GROUP_ SEQ_NUM	SEQ_NUM	AE_APPLID	AE_SECTION
HC89	3	230	UPG_BN89	HCBNS06

This section is executed in Upgrade Group 3 and has a SEQ_NUM of 230. There are three steps in the section. Each step manipulates the PS_LIFE_ADD_TBL table.

DETAIL_ID	SQL_STMT
HCBNS06.Step010.S	UPDATE PS_LIFE_ADD_TBL SET ENROLLE_TYPE=’2’ WHERE PLAN_TYPE IN (’24’,’25’)
HCBNS06.Step020.S	UPDATE PS_LIFE_ADD_TBL SET SUM_DEP_COVG=’Y’, COVERAGE_TYPE=’2’ WHERE LIFE_ADD_COVRG=’5
HCBNS06.Step030.S	UPDATE PS_LIFE_ADD_TBL SET COVERAGE_TYPE=’2’ WHERE LIFE_ADD_COVRG=’3’

The EOUFANALYSIS process will take this information and look for any sections in Upgrade Group 3 with a SEQ_NUM less than 230 or any section in Upgrade Group 1 that manipulates PS_LIFE_ADD_TBL. In this case there are no sections before this one that manipulate PS_LIFE_ADD_TBL. Next, look for sections in Upgrade Group 3 with a SEQ_NUM greater than 230 to see if any sections manipulate PS_LIFE_ADD_TBL. In this case there are a number of queries that reference this table.

DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBNS10.Step010.D	HCBNS10	%Select(UPG_BN_AET.FACTOR_XSALARY , UPG_BN_AET.FLAT_AMOUNT , UPG_BN_AET.CALC_ RULES_ID) SELECT DISTINCT L.FACTOR_XSALARY , L.FLAT_AMOUNT , C.CALC_RULES_ID FROM PS_LIFE_ADD_TBL L , PS_BEN_DEFN_OPTN O , PS_BEN_DEFN_COST C WHERE L.LIFE_ADD_ COVRG IN ('1','2') AND O.PLAN_TYPE = L.PLAN_TYPE AND O.BENEFIT_PLAN = L.BENEFIT_PLAN AND C.BENEFIT_PROGRAM = O.BENEFIT_PROGRAM AND C.EFFDT = O.EFFDT AND C.PLAN_TYPE = O.PLAN_TYPE AND C.OPTION_ID = O.OPTION_ID AND C.CALC_RULES_ ID<>' ' AND C.CALC_RULES_ID = (SELECT MIN(C1.CALC_RULES_ ID) FROM PS_LIFE_ADD_TBL L1 , PS_BEN_DEFN_OPTN O1 , PS_BEN_DEFN_COST C1 WHERE L1.PLAN_TYPE = L.PLAN_TYPE AND L1.BENEFIT_PLAN = L.BENEFIT_PLAN AND O1.PLAN_TYPE = L1.PLAN_TYPE AND O1.BENEFIT_PLAN = L1.BENEFIT_PLAN AND C1.BENEFIT_PROGRAM = O1.BENEFIT_PROGRAM AND C1.EFFDT = O1.EFFDT AND C1.PLAN_TYPE = O1.PLAN_TYPE AND C1.OPTION_ID = O1.OPTION_ID) ORDER BY L.FACTOR_XSALARY, L.FLAT_AMOUNT, C.CALC_RULES_ID

DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBNS10A.Step050.	HCBNS10	%Select(PLAN_TYPE,BENEFIT_PLAN,EFFDT) SELECT L.PLAN_TYPE ,L.BENEFIT_PLAN ,%DateOut(L.EFFDT) FROM PS_LIFE_ADD_TBL L , PS_BEN_DEFN_OPTN O , PS_BEN_DEFN_COST C WHERE O.PLAN_TYPE = L.PLAN_TYPE AND O.BENEFIT_PLAN = L.BENEFIT_PLAN AND C.BENEFIT_PROGRAM = O.BENEFIT_PROGRAM AND C.EFFDT = O.EFFDT AND C.PLAN_TYPE = O.PLAN_TYPE AND C.OPTION_ID = O.OPTION_ID AND C.CALC_RULES_ID = %Bind(CALC_RULES_ID) AND L.FACTOR_XSALARY = %Bind(FACTOR_XSALARY) AND L.FLAT_AMOUNT = %Bind(FLAT_AMOUNT) AND L.LIFE_ADD_COVRG IN ('1','2') AND L.BN_FORMULA_ID = ' ' AND C.CALC_RULES_ID = (SELECT MIN(C1.CALC_RULES_ID) FROM PS_LIFE_ADD_TBL L1 , PS_BEN_DEFN_OPTN O1 , PS_BEN_DEFN_COST C1 WHERE L1.PLAN_TYPE = L.PLAN_TYPE AND L1.BENEFIT_ PLAN = L.BENEFIT_PLAN AND O1.PLAN_TYPE = L1.PLAN_TYPE AND O1.BENEFIT_PLAN = L1.BENEFIT_PLAN AND C1.BENEFIT_PROGRAM = O1.BENEFIT_PROGRAM AND C1.EFFDT = O1.EFFDT AND C1.PLAN_TYPE = O1.PLAN_TYPE AND C1.OPTION_ID = O1.OPTION_ID)

DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBNS10A.Step050.S	HCBNS10	UPDATE PS_LIFE_ADD_TBL SET BN_FORMULA_ID = %Bind(BN_FORMULA_ID) WHERE PLAN_TYPE = %Bind(PLAN_TYPE) AND BENEFIT_PLAN = %Bind(BENEFIT_PLAN) AND EFFDT = %Bind(EFFDT)
HCBNS20.Step010.D	HCBNS20	%Select(EMPLID, EMPL_RCD, PLAN_TYPE, EFFDT, FLAT_AMOUNT, FACTOR_XSALARY, BENEFITS_BASE, CALC_RULES_ ID) SELECT L.EMPLID ,L.EMPL_RCD ,L.PLAN_TYPE ,%DateOut(L.EFFDT) , L.FLAT_AMOUNT ,L.FACTOR_XSALARY ,L.BENEFITS_BASE , C.CALC_RULES_ID FROM PS_LIFE_ADD_BEN L , PS_LIFE_ADD_TBL T , PS_BEN_PROG_PARTIC B , PS_BEN_DEFN_PGM PG , PS_BEN_DEFN_OPTN O , PS_BEN_DEFN_COST C WHERE L.COVERAGE_ELECT = ’E’ AND L.FACTOR_ XSALARY<>0 AND T.PLAN_TYPE = L.PLAN_TYPE AND T.BENEFIT_PLAN = L.BENEFIT_PLAN AND T.LIFE_ADD_COVRG = ’3’ AND T.EFFDT = (SELECT MAX(X.EFFDT) FROM PS_LIFE_ADD_TBL X WHERE X.PLAN_TYPE = T.PLAN_TYPE AND X.BENEFIT_PLAN = T.BENEFIT_PLAN AND X.EFFDT < = L.EFFDT) AND B.EMPLID = L.EMPLID AND B.EMPL_RCD = L.EMPL_RCD AND B.EFFDT = (SELECT MAX(X.EFFDT) FROM PS_BEN_PROG_PARTIC X WHERE X.EMPLID = B.EMPLID AND X.EMPL_RCD = B.EMPL_RCD AND X.EFFDT < = L.EFFDT) AND PG.BENEFIT_PROGRAM = B.BENEFIT_ PROGRAM AND PG.EFFDT = (SELECT MAX(X.EFFDT) FROM PS_BEN_DEFN_PGM X WHERE X.BENEFIT_PROGRAM = PG.BENEFIT_PROGRAM AND X.EFFDT < = L.EFFDT) AND O.BENEFIT_PROGRAM = PG.BENEFIT_PROGRAM AND O.EFFDT = PG.EFFDT AND O.PLAN_TYPE = L.PLAN_TYPE AND O.BENEFIT_PLAN = L.BENEFIT_PLAN AND O.OPTION_TYPE = ’O’ AND C.BENEFIT_PROGRAM = O.BENEFIT_PROGRAM AND C.EFFDT = O.EFFDT AND C.PLAN_TYPE = O.PLAN_TYPE AND C.OPTION_ID = O.OPTION_ID AND C.COST_TYPE = ’P’ ORDER BY L.EMPLID,L.EMPL_RCD,L.PLAN_TYPE,L.EFFDT

You can deduce from the information in the preceding table that Sections HCBNS10 and HCBNS20 are dependent on HCBNS06.

Task F-2-4: Reviewing Runtime for EOUFDATACONV

This section discusses:

- Understanding Runtime for EOUFDATACONV
- Querying the EOUF Tables

Understanding Runtime for EOUFDATACONV

All runtime information for EOUFDATACONV is stored in the following tables:

- PS_EOUF_DATACONV
- PS_EOUF_RUNSTATUS
- PS_EOUF_RUNDETAIL
- PS_EOUF_RUNCOUNT

The EOUFDATACONV Application Engine is the driver for the new Upgrade Data Conversion Framework and will be used instead of UPG_DATACONV to run data conversion in upgrades to application 9.1.

The EOUFDATACONV Application Engine leverages the Dependency Analysis to optimize the runtime of the data conversion. The runtime of the data conversion is improved in the new PeopleSoft release by running multiple instances of EOUFDATACONV in parallel, executing against a single set of dependency information. The optimal number of instances to be initiated will vary.

EOUFDATACONV determines which “Root Sections” are able to run and executes them. A Root Section is able to run when all Root Sections that are dependent on it have completed successfully.

In the event that multiple root sections are able to run at the same time, steps that have the largest number of dependent Root Sections and/or Root Sections that have the longest runtime (in a previous run), are given priority.

In the event of failure, the instance of EOUFDATACONV that encountered the error will mark the step as “Failed” and stop. All other instances of EOUFDATACONV will continue to run. Steps that are dependent on a “Failed” step will be marked as “Blocked” and will not be executed as part of the current run. Upon restarting the process, the “Failed” section and any “Blocked” sections will be executed.

The following list describes the EOUFDATACONV program flow:

- The run is initialized.

  This initial phase determines if this is a brand new run or if it is a restart of a previously failed run. If it is a new run, then EOUFDATACONV sets up a thread in PS_EOUF_RUNSTATUS.

- EOUFDATACONV performs a simple test to verify that there is work to do.

  If there is work to do, then EOUFDATACONV runs Data Conversion Application Engine Sections that have not already run. This is a fairly simple Do While loop that counts eligible sections left to run. If there are no more sections left to run, processing stops. The work inside the loop consists of executing a process to check the status of any other thread that is running. If a thread dies, it cannot clean itself up, so one of the other threads has to perform the cleanup. The cleanup mostly consists of setting the status flag in PS_EOUF_DATACONV to “F” for the AE Section that failed.

- SQLs run to look for work to do.

The SQL object EOUF_FINDSECTIONTORUN finds the next eligible section to run. If the query returns nothing, we execute another SQL object called EOUF_COUNTSECTIONSNOTDONE to count how many Sections are left to run. If EOUF_FINDSECTIONTORUN returns no work to do and EOUF_COUNTSECTIONSNOTDONE returns Sections still need to be run, then there must be a Section already running that must complete before anything else can run. If there is no work to do, the loop issues a pause before the loop completes and executes the next loop.

- EOUFDATACONV performs more housekeeping to reset statuses on successful completion of all Data Conversion Application Engine Sections.
- A completion message is written to the log file.

Querying the EOUF Tables

For example queries to retrieve detailed information from the data conversion analysis and runtime tables, and to validate the dependency model, refer to "Upgrade to PeopleSoft 9.1: Data Conversion Analysis and Runtime Data in the EOUF Tables," on My Oracle Support (Doc ID 1367476.1).

Task F-2-5: Reviewing EO Upgrade Framework Reporting

This section discusses:

- Understanding EO Upgrade Framework Reporting
- Reviewing the Tables Referenced Report
- Reviewing the Customization Impacts Report
- Reviewing Execution Report by Section – Duration
- Reviewing Execution Report by Section – Start Time
- Reviewing the Execution Report by Step
- Reviewing the Execution by Thread Report
- Reviewing the Thread Duration Report
- Reviewing the Execution Comparison Report
- Reviewing the Table Analysis Report

Understanding EO Upgrade Framework Reporting

You can query all tables populated and leveraged by the EO Upgrade Framework (as identified previously) through the various platform specific query tools or psquery. You can gather information in the EOUF tables to identify the following:

- Tables referenced in the data conversion code.
- Steps impacted by customizations (prior to the initial data conversion run).
- Performance issues (after the initial data conversion run).
- Impact of changes (run to run timing comparisons).

Oracle has delivered a series of standard reports to address the most commonly accessed information in the EOUF repository.

Reviewing the Tables Referenced Report

EOUF0001.SQR lists all tables referenced within the Application Engine data conversion programs. For each table listed, the report displays the section and step in which it is used, whether it is a data source or data target table, and the type of SQL statement in which it is referenced. This report is sorted by table name. Data for this report comes from the PS_EOUF_ANALYSIS, PS_EOUF_DTLIDSQLS, and PS_EOUF_DTLIDTBLS tables. This report can be run anytime after the EOUFANALYSIS Application Engine program has run and populated the EOUF tables used by this SQR.

Reviewing the Customization Impacts Report

EOUF0002.SQR shows the section/steps within the Application Engine data conversion programs that referenced tables with custom added fields. This report is sourced from the PS_EOUF_ANALYSIS table and the PSPROJECTITEM table. This report must be run after the customizations project has been compared against the New Release Demo database.

Reviewing Execution Report by Section – Duration

EOUF0003.SQR shows the duration or execution time for each Application Engine section. Since this report is at a section level, the information is sourced from the PS_EOUF_RUNDETAIL table. The report is ordered by execution time with the poorest performing steps at the top. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion run on which you want to report.

Reviewing Execution Report by Section – Start Time

EOUF0004.SQR shows the duration or execution time for each section. Since this report is at a section level, the information will be sourced from the PS_EOUF_RUNDETAIL table. The report would be ordered by start time so that you can see the order in which the sections were executed. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion run on which you want to report.

Reviewing the Execution Report by Step

EOUF0005.SQR shows the execution time for each section and the associated steps that were run.

This report requires a trace of 16,384 or higher.

Since this report is at a step level, it assumes that a trace of 16,384 or higher has been run so that the step information could be obtained from the PS_EOUF_TIMINGS_DT table. If the appropriate trace has not been run, then a report is not created and output files will be produced. The report will be ordered by execution time with the poorest performing steps at the top.

Reviewing the Execution by Thread Report

EOUF0006.SQR shows the execution timing of each Application Engine section run as part of the data conversion process. This report is sorted so that you can see which sections were executed by each thread. This report is sourced from the PS_EOUF_RUNDETAIL table.

Reviewing the Thread Duration Report

EOUF0007.SQR shows the total duration time for each thread used during the data conversion process. This report is sourced from the PS_EOUF_RUNDETAIL table. It can be run anytime after the PS_EOUF_RUNDETAIL table has been populated from the data conversion run on which you want to report.

Reviewing the Execution Comparison Report

EOUF0008.SQR shows the execution duration from the current run of data conversion as compared to the execution duration from the previous run of data conversion. This report is sourced from the PS_EOUF_RUNDETAIL table. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion runs on which you want to report.

Reviewing the Table Analysis Report

EOUF0009.SQR indicates how a particular application table is impacted by the create/alter scripts as well as the data conversion process during the PeopleSoft upgrade. This report is sourced from the PS_PTUALTRECDATA, PS_PTUALTRECFLDDAT, PS_EOUF_ALTRECDATA, PS_EOUF_ANALYSIS, and PS_EOUF_DTLIDTBLS tables. This report can be run after the Alter Analyzer and the AE Analyzer processes have successfully completed. This report is designed to be run against the initial pass database as the data stored in the tables during the Move to Production will differ.

Task F-3: Using the Upgrade Driver Program

The sequence of Application Engine sections that are run by an upgrade driver is maintained in the PS_UPG_DATACONV table. The Application Engine sections defined in the PS_UPG_DATACONV table are referred to as *root sections*.

There are three categories of Upgrade Groups:

- PRE – Data Conversion sections that must be executed in advance of all other sections.
- MAIN – Core Data Conversion
- POST – Data Conversion sections that must be executed after all other sections.

Note. Your specific upgrade may or may not contain pre-delivered PRE or POST groups.

Upgrade groups contain one or more Application Engine sections that are ordered within the group by sequence number. The Application Engine program UPG_DATACONV is used to execute PRE and POST data conversion groups. The Application Engine program EOUFDATACONV is used to execute the MAIN data conversion group.

When data conversion is executed using the UPG_DATACONV program, the sequence number is used to determine the “Absolute Run Order” of the upgrade group. When data conversion is executed using the EOUFDATACONV Application Program, the sequence number is used to determine the “Relative Run Order” of Application Engine sections that reference the same table or tables, but *not* the “Absolute Run Order” of the upgrade group(s).

Task F-4: Using the Upgrade Drivers Page

This section discusses:

- Understanding the Upgrade Drivers Page
- Accessing the Upgrade Drivers Page

- Adding the New Upgrade Drivers Section Page
- Inactivating the Upgrade Drivers Section

Understanding the Upgrade Drivers Page

Before you run data conversion, you may need to change what the Upgrade Driver program runs. You can add, remove, or deactivate Application Engine sections through the Upgrade Drivers page.

You do not have an active portal on your Copy of Production during data conversion, so you need to view and update the Data Conversion Definitions on your Demo database and then copy the updated data to your Copy of Production database.

Task F-4-1: Accessing the Upgrade Drivers Page

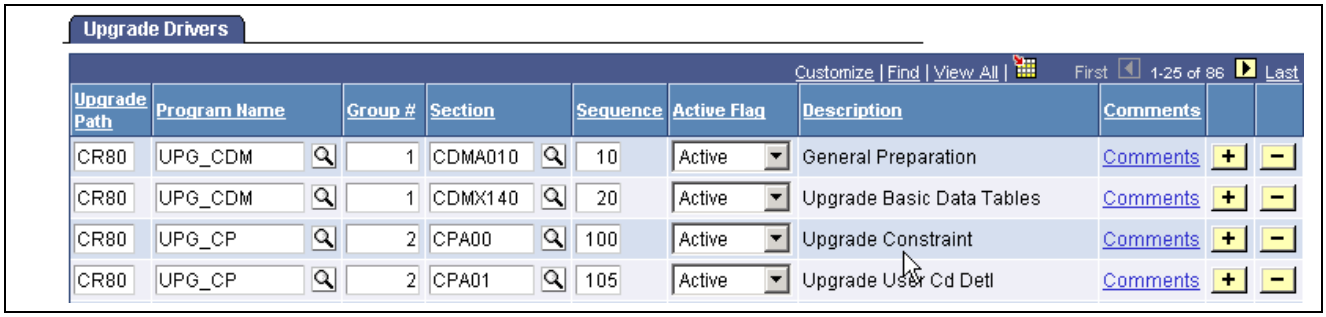
To access the Upgrade Drivers page:

1. From your browser, sign in to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Enter your upgrade path:

   `F881`

4. Click Search.

   The Upgrade Drivers page appears, as shown in the example below. Following the example of the Upgrade Drivers page are descriptions for each section of the page.



Upgrade Drivers page

- Upgrade Path. This field contains the upgrade path on which the section will be run.
- Program Name. This is the Application Engine program that contains the section.
- Group #. This is the group number. All sections with the same group number will be run during the same run of the UPG_DATACONV Application Engine program.
- Section. This is the section that will be called from the UPG_DATACONV Application Engine program.
- Sequence. This is the order in which the sections will be called during the run of UPG_DATACONV for the group number.
- Active Flag. This field determines whether the section will be run. If the value of this field is *Active*, the section will be run. If the value is *Inactive*, it will not be run. If you need to remove a section, change the value in this field to *Inactive*.
- Description.
- Comments.

Task F-4-2: Adding the New Upgrade Drivers Section Page

Follow the instructions below to add a new section to the Upgrade Drivers page.

Note. To add a new section, the Application Engine program and section must exist on the Demo database.

To add a new section to the Upgrade Drivers page:

1. From your browser, sign in to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Select Add a New Value.
4. Click Add.
5. Enter values for Upgrade Path and Program Name.
6. Enter a value for Group #.

   Note. Each group number corresponds to a data conversion step in the PeopleSoft Change Assistant template. If you select a group number that already exists in the PS_UPG_DATACONV table, your section will be executed when PeopleSoft Change Assistant runs the data conversion step that corresponds to the group number you selected. Alternatively, if you assign a group number to your new section that does not already exist in PS_UPG_DATACONV, you must add a new step to your PeopleSoft Change Assistant template. The new template step will have the same properties as the other data conversion steps, except for the group number specified in the step properties Parameters box.

   ---

7. Enter values for Section and Sequence.

   The Description and Comments fields are optional.
8. Click Save.
9. When you have completed all changes, sign in to your Demo database using PeopleSoft Data Mover and run the following script to export the updated data conversion data:

   ```
   DLUPX03E.DMS
   ```

10. Sign in to your Copy of Production database using PeopleSoft Data Mover and run the following script to load the updated data conversion data:

    ```
    DLUPX03I.DMS
    ```

    See the PeopleTools: Change Assistant PeopleBook for your new release, Appendix: “Using a Change Assistant Template.”

Task F-4-3: Inactivating the Upgrade Drivers Section

Follow the instructions below to deactivate a section on the Upgrade Drivers page. Once deactivated, the section will not run as part of data conversion.

To inactivate a section on the Upgrade Drivers page:

1. From your browser, sign in to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Enter your upgrade path:


```
F881
```

4. Click Search.
5. Find the row with the Program Name and Section you want to remove and change the value of the Active Flag field to *Inactive*.
6. Click Save.
7. When you have completed all changes, sign in to your Demo database using PeopleSoft Data Mover and run the following script to export the updated data conversion data:

   ```
   DLUPX03E.DMS
   ```

8. Sign in to your Copy of Production database using PeopleSoft Data Mover and run the following script to load the updated data conversion data:

   ```
   DLUPX03I.DMS
   ```


APPENDIX G

Using the Comparison Process

This appendix discusses:

- Understanding the Comparison Process
- Understanding Upgrade Compare Reports

Task G-1: Understanding the Comparison Process

This section discusses:

- Reviewing the Source and Target Columns
- Reviewing the Action Column
- Reviewing the Upgrade Column
- Putting It All Together

During the upgrade you run a compare process and then review the resulting reports. The compare process first compares every property of an object definition on the Source database to the properties of object definitions on the Target database. The PeopleSoft system tracks object changes using the contents of the PSRELEASE table, and the value of two fields, LASTUPDDTTM, and LASTUPDOPRID, used in the PeopleSoft PeopleTools tables, as follows:

- The PSRELEASE table maintains the Comparison Release Level. This table contains rows of data for every release level at which the database has ever existed. The first column in this table, RELEASEDTTM, contains a date/time stamp identifying when each release level was "stamped." The second column, RELEASELABEL, identifies the release level. The format of a release label is *M XX.XX.XX.YYY*, where *M* is the market code, *XX* is an integer from 0 to 99, and *YYY* is an integer from 0 to 999. A release label has two parts: the PeopleSoft release number (*M XX.XX.XX*) and the customer release number (*YYY*). Each time you customize your production database, you can stamp it with a new customer release level to help you track your changes over time. You should not change any portion of the PeopleSoft release number unless specifically instructed to do so.
- The LASTUPDDTTM field in our PS*object*DEFN tables—such as PSRECDEFN, PSPNLDEFN, and so on—stores a date/time stamp of when each object was last modified.
- The LASTUPDOPRID field stores the operator ID of the user who made the modification. If Oracle made the modification, the proprietary ID *PPLSOFT* is used.

Note. Maintain Security prevents you from creating an operator named PPLSOFT.

If an object definition is defined differently in the Source database than in the Target database, the compare process will check to see whether either object definition has changed since the comparison release. If the object's LASTUPDDTTM value is greater than the RELEASEDTTM value for the comparison release level (stored in PSRELEASE), the object has changed. If the object's LASTUPDDTTM value is equal to or less than RELEASEDTTM, the object has not changed (since the comparison release). Whether the compared object has changed or not, if it has *ever* been changed prior to the comparison release by someone other than Oracle (LASTUPDOPRID does not equal 'PPLSOFT'), the object is identified as a customization.

After you run a compare report, you see the following information when you open an object type in the upgrade project from the Upgrade Tab of PeopleSoft Application Designer. This is called the PeopleSoft Application Designer Upgrade Definition window.

Task G-1-1: Reviewing the Source and Target Columns

The status of each object is reported as it appears on the Source database and the Target database. The following table explains the various status types:

Status Type	Definition
Unknown	The object has not been compared. This is the default status for all objects inserted manually into a project and the permanent status of all non-comparison objects.
Absent	The object was found in the other database, but not in this one. When upgrading to a new PeopleSoft release, all of our new objects should have Absent status in the Target database and all of your new objects should have Absent status in the Source database.
Changed	The object has been compared, its LASTUPDOPRID value is *PPLSOFT*, and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In other words, Oracle modified the object since the comparison release.
Unchanged	The object has been compared, its LASTUPDOPRID value is *PPLSOFT*, and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In other words, Oracle last modified the object prior to the comparison release.
*Changed	The object has been compared, its LASTUPDOPRID value is not *PPLSOFT*, and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In this case, the customer has modified the object since the comparison release.

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 G-1-2: Reviewing the Action Column

The default actions for each object that you compared are reported in the Action column. The compare sets the action column based on what you need to do to make the Target database consistent with the Source database. You should not change these actions. You can decide whether or not to accept each action by setting the Upgrade value. The following table explains the various action types:

Action Type	Definition
Copy	Object will be added to the Target database
Copy Prop (Records and Fields only)	Object will be added to the Target database
Delete	Object will be deleted from the Target database.
None	No action will be taken on this object.

The PeopleSoft system assigns one of these action types to every object in a comparison project and in the compare reports. However, these actions are not necessarily carried out during the copy process. The value of the Upgrade column for each object makes that determination.

Task G-1-3: Reviewing the Upgrade Column

The Upgrade values for each object – YES or NO – determine whether the object action will be carried out during the copy process. The upgrade orientation you assign during the compare process determines these settings. You can orient the Upgrade to keep Oracle changes or to retain your changes in the Target database. Whichever orientation you choose, you will still have the option to set each Upgrade value individually before launching the copy process.

You may find that after the compare process, your project contains objects that show up as Unchanged on the Demo database and Changed on the Copy of Production and the Upgrade column is not checked. What this status combination means is that the PeopleSoft object on your Copy of Production was changed more recently than on the Demo database. In these instances, Oracle recommends that you accept the Demo database version of the object.

Task G-1-4: Putting It All Together

The following chart summarizes every possible Status, Action, and Upgrade value that could be set by the compare process to a single object:

Source Status	Target Status	Action	Oracle-delivered	Keep Customizations
(Any)	Absent	COPY	YES	YES
Absent	Changed or Unchanged	DELETE	YES	YES
Absent	Changed* or Unchanged*	DELETE	NO	NO
Changed	Changed or Unchanged	COPY	YES	YES
Changed	Changed* or Unchanged*	COPY	YES	NO
Unchanged	Changed	COPY	NO	NO
Unchanged	Unchanged	COPY	YES	YES
Unchanged	Changed* or Unchanged*	COPY	YES	NO
Changed*	Changed or Unchanged	COPY	NO	YES
Changed*	Changed* or Unchanged*	COPY	YES	YES
Unchanged*	Changed or Unchanged	COPY	NO	YES
Unchanged*	Changed*	COPY	NO	NO
Unchanged*	Unchanged*	COPY	YES	YES

Task G-2: Understanding Upgrade Compare Reports

This section discusses:

- Reviewing Report Columns
- Using Reports

When you run the compare process, it creates reports to help you understand what objects differ between the Source and Target databases, and how they differ. If you have documentation of your database modifications, you should retrieve it before reviewing these reports. This will help you understand how the Target objects have changed and enable you to better compare the Target version of the object with the Source version. If you are upgrading to a new PeopleSoft release, you should also review the release notes for your product. These notes will identify and explain object changes in the New Release Demo database.

Upgrade reports can be a little intimidating at first glance, until you understand what data you are looking for and how best to use it. This section includes information to help you use the reports.

Task G-2-1: Reviewing Report Columns

For the most part, the columns in upgrade reports correspond with the columns you see in PeopleSoft Application Designer's upgrade definition window. Moving from left to right, you see the Name of the object, then other key columns that vary by object type, then the Source and Target status, the Action value and Upgrade flag (*Yes* or *No*).

After these columns are three more that are not included in PeopleSoft Application Designer. The first is Attribute. This tells you the type of difference that was found between the two objects. For example, record field attribute values include *Use/Edit*, which identifies key or audit differences, and Default Field Name (*Def. Fldnm*), which identifies differences in a default value. Lastly, there is a Source column and a Target column. These wide columns display the actual differences between the object definitions. For example, on a *Use/Edit* attribute recfield difference, the Source column might contain *Xlat Table Edit* while the Target column is empty. This means that the Source record field has a translate table edit while the Target record field does not.

If you are unsure of the meaning of any value in the last three report columns, open the PeopleSoft PeopleTools tool that edits the particular object. The values in these columns correspond directly to dialog options in the tool.

Task G-2-2: Using Reports

Oracle delivers several cross-reference reports that you can run to provide information about the inter-relationships between various objects. Oracle delivers these reports in the form of SQRs (found in *PS_HOME*\SQR), Crystal Reports (found in *PS_HOME*\CRW\ENG), and Queries.

The following table describes the various cross-reference reports:

Object Type(s)	Report Name	Report Description
Applications and Fields	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.
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.

Object Type(s)	Report Name	Report Description
Menu Listing	XRFMENU	Lists application windows in alphabetical order. The report details all menus within each window, and all page definitions within each menu. It also includes the associated search record definition name and detail page definition name.
Panel Listing	XRFPANEL	Lists all page definitions in alphabetical order.
PeopleCode Programs and Field References	XRFPCFL	Lists record definitions that contain fields with PeopleCode program attributes. The report includes the Field Name, as well as the associated record definitions and fields referenced in the PeopleCode program.
Panels with PeopleCode	XRFPNPC	Lists all pages that contain fields with PeopleCode attributes. For each page, the report includes the name of the record definition(s) that contain the field as well as the Field Name and Type.
Fields and Records	XRFRCFL	Lists all fields in alphabetical order by associated record definition name. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field.
Records and Panels	XRFRCPN	Lists all record definitions in alphabetical order. The report includes the menu and page definitions associated with each record definition.
Window Listing	XRFWIN	Lists all application windows in alphabetical order.

In addition to using our standard cross-reference reports, you can also generate ad hoc reports to extract the exact combination of information you need. Or, you can create permanent custom reports for information you extract on a regular basis.

Oracle recommends that you mark your upgrade reports using a color-coding system to help you quickly identify what you need to do to certain objects.

If you have several people reviewing sections of the reports, a good documentation policy is to have everyone on your review cycle initial and date the action defaults and overrides they select.

You may also find it easier to change some objects manually after the upgrade, rather than copying the new versions from the Source database.

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