

ORACLE®

PEOPLESOFT

PeopleSoft Staffing Front Office 8.8 to FSCM 9.1 Feature Pack 2 Upgrade

January 2012

ORACLE®

Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

License Restrictions Warranty/Consequential Damages Disclaimer

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

Warranty Disclaimer

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

Restricted Rights Notice

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

U.S. GOVERNMENT RIGHTS

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

Hazardous Applications Notice

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

Third Party Content, Products, and Services Disclaimer

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

Contents

Preface

About This Documentation.....	ix
Understanding This Documentation.....	ix
Prerequisites.....	ix
Audience.....	ix
Organization.....	x
Typographical Conventions.....	x
Products.....	xi
Related Information.....	xii
Comments and Suggestions.....	xii

Chapter 1

Installing the Software.....	1
Understanding Software Installation.....	1
Installing the New Release.....	1
Applying PeopleTools Patches.....	2
Installing Change Assistant.....	3
Retrieving and Applying Upgrade Files.....	3
Understanding Upgrade Files.....	3
Applying Baseline Upgrade Files.....	4
Applying Required for Upgrade Fixes.....	4
Creating and Configuring an Upgrade Job.....	6
Reviewing Upgrade Step Properties.....	7

Chapter 2

Planning Your Application Upgrade.....	9
Understanding Application Upgrade Planning.....	9
Understanding Your Upgrade.....	9
Understanding PeopleSoft Upgrades.....	9
Verifying the Software Installation.....	9
Defining Upgrade Databases.....	10
Reviewing Upgrade Notes and Tips.....	10

Chapter 3

Preparing Your Database for Upgrade.....	13
Understanding Database Preparation.....	13
Applying Upgrade Planning Files	13
Understanding Applying Upgrade Planning Files.....	14
Applying the UPGOPTFO Project	14
Building the UPGOPTFO Project	14
Setting Up Security for Upgrade Planning.....	15
Setting Up Front Office.....	15
Understanding the Front Office Setup.....	16
Verifying Installation Options.....	16
Configuring PC Business Unit.....	16
Mapping Skill Type to Competency Type.....	17
Mapping Skill Code to Competency.....	20
Mapping Resource and Order Priority Values.....	21
Mapping Business Unit to Location Code.....	23
Mapping Test to Accomplishment.....	25
Mapping Degree to Accomplishment.....	26
Mapping Major Code	28
Mapping School Code	30
Printing Translate Values for NAME PREFIX.....	32
Printing Translate Values for SCHOOL TYPE.....	32
Exporting Front Office Data.....	33
Understanding Front Office Data Export.....	33
Updating Configuration Manager Profile.....	33
Exporting Front Office NonStable Tables.....	34
Exporting Front Office Stable Tables.....	35
Performing General Options Setup	35
Populating UPG_CONV_TBL Table	35
Verifying the Upgrade User.....	36

Chapter 4

Applying Application Changes.....	37
Understanding Application Changes.....	37
Importing Front Office Data.....	37
Understanding Front Office Data Import.....	38
Importing Front Office NonStable Tables.....	38
Importing Front Office Stable Tables.....	38
Building Front Office Create Indexes Script.....	38

Running Front Office Create Indexes Script.....	39
Preparing for Data Conversion Analysis.....	39
Populating Alter Analyzer Repository.....	39
Building the EOUF_UPGRADE_FRAMEWORK Project.....	39
Running the EOUF_UPGRADE_FRAMEWORK Script.....	40
Modifying the Database Structure	40
Building the Upgrade Tables Script.....	40
Re-Creating Upgrade Tables	41
Creating Upgrade Views	41
Loading Data for Data Conversion	41
Running Required for Upgrade Data.....	41
Updating the Installation Option	42
Applying Updates Before Data Conversion.....	42
Configuring Scheduler and Server	43
Backing Up Before Data Conversion.....	43
Running Data Conversion for Front Office.....	43
Backing Up After Data Conversion.....	44
Updating Object Version Numbers	44
Running the Final Audit Reports.....	44
Running the Final DDDAUDIT Report.....	45
Running the Final SYSAUDIT Report.....	45
Running the Final SYSAUD01 Report.....	45
Creating the FNLALTAUD Project.....	45
Running the Final Alter Audit.....	46
Reviewing the Final Audits.....	46
Running the Final SETINDEX Report.....	47
Configuring the Upgrade Environment.....	47
Configuring the Web Server.....	47
Configuring Portal.....	47
Configuring Front Office and PayBill.....	48
Understanding Front Office Configuration.....	48
Configuring School Type Values.....	49
Configuring Salutation Table Values.....	49
Running Cache Administration.....	50
Reconfiguring Security.....	51
Backing Up Before Testing.....	51
Testing Your Upgraded System Database	51

Chapter 5

Appendices.....	53
Understanding Appendices.....	53

Appendix A

Applying Fixes Required for Upgrade.....	55
Preparing to Apply Fixes.....	55
Applying Fixes During Installation.....	56
Applying Fixes After Copying Project.....	56
Applying Fixes After Data Conversion.....	57
Applying Fixes Between Upgrade Passes.....	57
Applying Fixes in Move to Production.....	58

Appendix B

Upgrading Front Office and PayBill.....	59
Reviewing the Front Office Standalone Upgrade.....	59

Appendix C

Using Data Conversion Utilities.....	61
Understanding Data Conversion Utilities.....	61
Using the UPGDATA CONV Process.....	61
Understanding the UPGDATA CONV Process.....	61
Reviewing the Data Conversion Report.....	62
Using the EO Upgrade Framework Process.....	62
Understanding the EO Upgrade Framework Process.....	62
Reviewing EO Upgrade Framework Initial Analysis.....	63
Reviewing Dependency Analysis.....	73
Reviewing Runtime for EOUPDATA CONV.....	78
Reviewing EO Upgrade Framework Reporting.....	79
Using the Upgrade Driver Program.....	81
Using the Upgrade Drivers Page.....	81
Understanding the Upgrade Drivers Page.....	82
Accessing the Upgrade Drivers Page.....	82
Adding the New Upgrade Drivers Section Page.....	83
Inactivating the Upgrade Drivers Section.....	83

Index85

About This Documentation

This preface discusses:

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

Understanding This Documentation

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

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

Prerequisites

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

Audience

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

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

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

- Microsoft Windows.

Oracle recommends that you complete training before performing an upgrade.

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

Organization

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

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

Typographical Conventions

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

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

Convention	Description
Note. Note text.	Text that begins with <i>Note</i> indicates information that you should pay particular attention to as you work with your PeopleSoft system.
Important! Important note text.	A note that begins with <i>Important!</i> is crucial and includes information about what you need to do for the system to function properly.
Warning! Warning text.	A note that begins with <i>Warning!</i> contains crucial configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these products and product families:

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

- *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

Installing the Software

This chapter discusses:

- Understanding Software Installation
- Installing the New Release
- Applying PeopleTools Patches
- Installing Change Assistant
- Retrieving and Applying Upgrade Files
- Creating and Configuring an Upgrade Job
- Reviewing Upgrade Step Properties

Understanding Software Installation

This chapter discusses how you install all of the software that is required for your upgrade. It is very important that you complete all of the instructions discussed in this chapter before you begin the upgrade.

Task 1-1: Installing the New Release

To upgrade your system:

1. Install Oracle's PeopleSoft Financial Management Solutions (FMS) 9.1 codeline and system database.
2. Download the PeopleTools installation guide for your platform.
Go to My Oracle Support and select the Knowledge tab. Search for the PeopleSoft PeopleTools installation guide for your platform and new release.
3. Download the application-specific addenda for the product line that you are installing.
Go to My Oracle Support and select the Knowledge tab. Search for the PeopleSoft PeopleTools addenda for your product and new release.
4. Install your new PeopleSoft software and system database following the instructions in the PeopleSoft PeopleTools installation guide for your platform along with the application installation guide for your product line.

Note. Oracle’s PeopleSoft Financials/Supply Chain Management (FSCM) family of applications is sometimes referred to in this documentation as Financials. Also, Oracle’s PeopleSoft Staffing Front Office is sometimes referred to as Front Office, and Oracle’s PeopleSoft Pay/Bill Management is sometimes referred to as Pay/Bill or PayBill.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-2: Applying PeopleTools Patches

In this task, you will download and apply PeopleSoft PeopleTools Required for Upgrade patches from Patches & Updates on My Oracle Support.

Important! Because the release of an upgrade is often intimately tied to a PeopleSoft PeopleTools patch release, complete this step only after the complete upgrade for your product is released on My Oracle Support. The certified upgrade path for your product will indicate the *minimum* PeopleSoft PeopleTools release and patch level that is required for your upgrade. Make note of this minimum PeopleSoft PeopleTools release and patch level.

However, it is recommended that you take the most updated version of PeopleSoft PeopleTools as long as your minimum release is included to ensure that you have the most updated PeopleSoft PeopleTools.

Applying PeopleSoft PeopleTools patches will bring you completely up-to-date with any changes made to PeopleSoft PeopleTools that affect the upgrade process. These PeopleSoft PeopleTools patches should only be applied to your source database at the beginning or end of an upgrade pass. If you apply a PeopleSoft PeopleTools patch at the beginning of the upgrade pass to your source database, the changes will automatically be migrated to the target database. You can apply PeopleSoft PeopleTools patches to the target database at the end of an upgrade pass if the patches were not applied to the source database in the beginning of the upgrade.

To apply all PeopleSoft PeopleTools Required for Upgrade patches:

1. Go to My Oracle Support and select the Patches & Updates tab.
2. Select the PeopleSoft link.
3. Under Updates and Fixes, select the “Required for Install or Upgrade” link.
4. Select the following search criteria:
 - For Product Line, select *PeopleTools*.
 - For Product, select *PeopleTools*.
 - For Release, select your new PeopleTools release.
 - Select the Required for Upgrade option.
5. Click the arrow icon to execute the search.
6. Select the update ID for the desired PeopleSoft PeopleTools patch.

Note. Rather than taking the minimum patch level suggested on the product upgrade page, it is recommended that you take the latest PeopleSoft PeopleTools patch so that you are completely up-to-date with all PeopleSoft PeopleTools updates.

7. Click the *User Doc* link to read the patch documentation on how to download and apply the patch.
8. Download and install the PeopleSoft PeopleTools patch.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 1-3: Installing Change Assistant

As part of the PeopleSoft PeopleTools installation and/or the application of the PeopleSoft PeopleTools patch, PeopleSoft Change Assistant has been installed.

The PeopleTools: Change Assistant PeopleBook documentation is delivered with your software. You can also access this documentation through your upgrade page on My Oracle Support. Go to My Oracle Support, select the Knowledge tab, and search for the upgrade page for your product and release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-4: Retrieving and Applying Upgrade Files

This section discusses:

- Understanding Upgrade Files
- Applying Baseline Upgrade Files
- Applying Required for Upgrade Fixes

Understanding Upgrade Files

In this task, you will download and apply all files and objects from the upgrade page on My Oracle Support. In addition, you will download all Required for Upgrade fixes from Patches & Updates on My Oracle Support. This will bring you completely up-to-date with all upgrade objects and any changes made to the upgrade process or conversion code.

Note. You cannot continue with this task until the upgrade documentation for your product is released on My Oracle Support. Once the upgrade scripts and templates and upgrade documentation are available, complete the remaining tasks in this chapter before beginning the actual upgrade.

This step is just one of the steps in an upgrade in which you can apply Required for Upgrade fixes. There are other places in the upgrade process where applying updates may be applicable as well. How you apply the updates varies depending on where you are in the upgrade. The high-level view of where, when, and how to apply Required for Upgrade fixes is discussed in your product-specific upgrade guide.

See Appendix: “Applying Fixes Required for Upgrade” in your product-specific upgrade guide.

Task 1-4-1: Applying Baseline Upgrade Files

At Upgrade General Availability (UGA), upgrade templates and upgrade documentation are available on the upgrade page on My Oracle Support. Review the page and download the necessary files for your upgrade.

The baseline upgrade conversion scripts that you will need to perform the upgrade are available as a Required for Upgrade resolution on My Oracle Support. It is the prerequisite to all other Required for Upgrade resolutions.

See Applying Required for Upgrade Fixes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-4-2: Applying Required for Upgrade Fixes

Additional Required for Upgrade fixes can be found on My Oracle Support. There are two ways that you can search for these fixes—either through Patches & Updates on My Oracle Support or by using the Update Gateway through PeopleSoft Change Assistant. You can select the approach most comfortable for you

Important! You should apply all listed fixes. If you do not apply all fixes, you may be introducing an error into your upgrade. Some of the fixes will list a specific upgrade path. You should apply these fixes even if they are targeted for a different upgrade path. There may be interdependencies between the upgrade programs for various paths, and if you do not apply all fixes you may introduce errors.

To apply Required for Upgrade fixes from Patches & Updates on My Oracle Support:

1. Go to My Oracle Support and select the Patches & Updates tab.
2. Select the PeopleSoft link.
3. Under Updates and Fixes, select the “Required for Install or Upgrade” link.
4. Select the following search criteria:
 - For Product Line, select your PeopleSoft product line.
 - For Product, select *Upgrade*.
 - For Release, select your new product release.

- Select the Required for Upgrade option.
5. Click the arrow icon to execute the search.
 6. Note the update IDs for any Required for Upgrade fixes.
 7. Download the noted fixes using the “download change package” functionality in Change Assistant (Tools, Download Change Packages).
 8. Before applying each fix, review the documentation included with the fix.
There may be manual steps that need to be performed to successfully apply the fix.
 9. Use PeopleSoft Change Assistant to apply the fixes to your Demo database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant, for your current release, “Using Change Assistant For Software Updates.”

To apply Required for Upgrade fixes using Update Gateway:

1. In PeopleSoft Change Assistant, select Tools, Go To Update Gateway.
2. Select the “Find updates that have not yet been installed” option.
3. Click Next.
4. Click the “Manually enter environment information” link.
5. Enter the following search criteria:
 - For Product Line, select your PeopleSoft product line.
 - For Release, select your new product release.
6. Click Next.
7. Select the products that are applicable to your installation.
8. Click Next.
9. Select the “Required for completing an upgrade” option under Update Type.
Ensure that the “Include prerequisites and post-requisites not already applied to selected environment” check box is selected.
10. Click Next.
11. On this page, you can exclude any listed update IDs that you may have already installed.
12. Once the list appears correct, click Next to see a preview of what will be downloaded.
13. Click “Download List to Microsoft Excel” to download the list of update IDs to an Excel spreadsheet.
14. Download the noted fixes using the “download change package” functionality in PeopleSoft Change Assistant (Tools, Download Change Packages).
15. Before applying each fix, review the documentation included with the fix.
There may be manual steps that need to be performed to successfully apply the fix.
16. Use PeopleSoft Change Assistant to apply the fixes to your Demo database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, “Applying Updates.”

Warning! DO NOT INSTALL ANY APPLICATION FIXES, BUNDLES, OR MAINTENANCE PACKS AT THIS TIME! The only fixes you can apply at this time are Required for Installation, Required for Upgrade, and any other fixes from the Upgrade home page. Installing other application fixes during the upgrade process can break data conversion and other scripts for the upgrade. This includes installing fixes to the Demo database used as your Source database during the upgrade, as well as any upgraded Copy of Production database you use during your Move to Production test passes. Application fixes, bundles, and maintenance packs can be applied after the upgrade is complete.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-5: Creating and Configuring an Upgrade Job

To run an upgrade using PeopleSoft Change Assistant, you need to configure PeopleSoft Change Assistant as well as an upgrade job.

Launch PeopleSoft Change Assistant and perform the following steps:

1. Configure the PeopleSoft Change Assistant options:
 - a. Select Tools, Options.
 - b. On the Change Assistant tab, select the Perform Application Upgrade mode.
 - c. Check the Enable Server Processing check box if you will be using PeopleSoft Change Assistant to run processes on a separate host server.
 - d. Fill in the rest of the information on this tab and all other active tabs.
 - e. Click OK when finished.

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

2. Import the upgrade template contained within the UpgradeTemplates.exe file.
 - a. Select File, Import Template.
 - b. Select the template for your product and path.
 - c. Click Import.
3. Define the upgrade environment information for the upgrade.
 - a. Select File, New Environment.
 - b. Name the environment for this upgrade pass.
 - c. Click OK.
 - d. Fill in all required information on each screen.
4. Set the documentation directory:

PeopleSoft Change Assistant can display the HTML upgrade documentation in the documentation pane.

- a. Select Edit, Set Documentation Directory.
- b. Enter or browse to the directory containing the HTML documentation and click OK.

See the PeopleTools: Change Assistant PeopleBook for your new release, “Configuring Change Assistant for Upgrades.”

5. Create the upgrade job for the Initial upgrade pass.

The upgrade job contains all steps specific to your upgrade environment.

See the PeopleTools: Change Assistant PeopleBook for your new release, “Configuring Change Assistant for Upgrades.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-6: Reviewing Upgrade Step Properties

When you open the upgrade template using PeopleSoft Change Assistant, you can find the various properties specified for each upgrade step. Several of those properties are included in the upgrade documentation. At the end of each upgrade step, there is a table that specifies the property values that apply to that step. The following graphic provides an example of the property information that is displayed in the upgrade documentation:

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

Properties box example

The Database Orientation property has two possible values: Source or Target.

Note. This upgrade differs from many other PeopleSoft upgrades. Please pay special attention to the descriptions for each database.

- Source indicates that the step runs on the Source database. During your initial pass and for test Move to Production passes, the Source database is a Copy of your old release Front Office Production database.
- Target indicates that the step runs on the Target database, which is your new PeopleSoft FSCM 9.1 system database.

The “Initial or MTP” property has three possible values: Initial, MTP, or Both.

- Initial indicates that this step runs only in the Initial pass of the upgrade.
- MTP indicates that this step runs only in Move to Production upgrade passes. This step is not applicable to the Initial pass.

- Both indicates that this step runs in both the Initial and Move to Production upgrade passes.

The Products property has two possible values: All or specific product names:

- All indicates that you run the step regardless of which products you are upgrading.
- A specific product name or names indicates that you run the step only if you are upgrading the specified product or products. You specified the product or products that you would upgrade when you set up your PeopleSoft Change Assistant job configuration.

The Platforms property has two possible values: All or specific platform names.

- All indicates that you run the step regardless of which platform your database uses.
- A specific platform name or names indicates that you run the step only if your database uses one of the specified platforms. You specified the platform that you would use when you set up your PeopleSoft Change Assistant job configuration. The following platform names may be specified for the Platforms property:
 - DB2 z/OS
 - DB2 UNIX/NT
 - Informix
 - MS SQL Server
 - Oracle
 - Sybase

Note. DB2 UDB for OS/390 and z/OS is the official IBM name for the database management system. The current PeopleSoft PeopleTools release no longer supports the OS/390 operating system; it supports only z/OS, the replacement for OS/390. For the sake of brevity, this documentation sometimes refers to DB2 UDB for OS/390 and z/OS as DB2 z/OS, and it sometimes refers to DB2 UDB for Linux, UNIX, and Windows as DB2 UNIX/NT.

The Languages property has two possible values: All or specific language names.

- All indicates that you run the step regardless of which language your database uses.
- A specific language name or names indicates that you run this step only if your database uses the languages specified. You specified the languages installed on your database when you set up your PeopleSoft Change Assistant job configuration.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

CHAPTER 2

Planning Your Application Upgrade

This chapter discusses:

- Understanding Application Upgrade Planning
- Understanding Your Upgrade

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).

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: Understanding Your Upgrade

This section discusses:

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

Understanding PeopleSoft Upgrades

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

Task 2-1-1: 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 2-1-2: 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 2-1-3: Reviewing Upgrade Notes and Tips

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

- 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.

- 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

CHAPTER 3

Preparing Your Database for Upgrade

This chapter discusses:

- Understanding Database Preparation
- Applying Upgrade Planning Files
- Setting Up Front Office
- Exporting Front Office Data
- Performing General Options Setup
- Verifying the Upgrade User

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 3-1: Applying Upgrade Planning Files

This section discusses:

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

Understanding Applying Upgrade Planning Files

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

Task 3-1-1: Applying the UPGOPTFO Project

In this step, apply the PeopleSoft Staffing Front Office (FO) UPGOPTFO project to your Copy of Production database using the Copy Project from File process.

Apply the UPGOPTFO to your PeopleSoft Staffing Front Office database by following the instructions below.

To apply the UPGOPTFO project:

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

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

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-1-2: Building the UPGOPTFO Project

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

To build the UPGOPTFO project:

1. Using your current codeline, launch Application Designer and sign on to your Copy of Production database.
2. Select File, Open...
3. In the Definition drop-down list box, select Project and click Open to display the list of projects.
4. Select UPGOPTFO and click Open again.
5. Select Build, Project...
6. Under Build Options, select Create Tables, Create Views.
7. Click Settings...
8. On the Create tab, select Recreate View if it already exists and Recreate Table if it already exists.
9. On the Logging tab, select Fatal errors, warnings, and informational messages.
10. On the Scripts tab, select Output to separate files.

11. In the Script File Names box, give your scripts a unique name that reflects this task number and the object being created.
12. Click OK.
13. Under Build Execute Options, select Build script file.
14. Click Build.
15. Using the appropriate SQL query tool for your platform, run the scripts created in the step above.
Run the scripts in the following order: Create Tables, Create Views, Create Indexes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

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

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

To set up security:

1. Select PeopleTools, Security, Permissions and 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 the permission list for the users that will be reviewing and setting up functional requirements for the upgrade.
4. Grant access to this permission list for the following navigations:
PeopleTools, Utilities, Administration, Translate Values.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2: Setting Up Front Office

This section discusses:

- Understanding the Front Office Setup
- Verifying Installation Options
- Configuring PC Business Unit
- Mapping Skill Type to Competency Type

- Mapping Skill Code to Competency
- Mapping Resource and Order Priority Values
- Mapping Business Unit to Location Code
- Mapping Test to Accomplishment
- Mapping Degree to Accomplishment
- Mapping Major Code
- Mapping School Code
- Printing Translate Values for NAME PREFIX
- Printing Translate Values for SCHOOL TYPE

Understanding the Front Office Setup

In this task, you will set up your data on your PeopleSoft Staffing Front Office database to prepare it for conversion.

Task 3-2-1: Verifying Installation Options

In this step, verify that you selected the correct products when you installed your PeopleSoft FSCM 9.1 database.

Note. Run this step against your PeopleSoft FSCM database.

To verify installation options:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Verify that the Pay/Bill Management check box is *not* selected.
3. Verify that the Staffing Front Office check box is selected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-2-2: Configuring PC Business Unit

As part of the upgrade to PeopleSoft FSCM 9.1, all PeopleSoft Staffing Front Office 8.8 Business Units are mapped with Location Codes and Project Costing (PC) Business Units to upgrade the Business Units to Staffing Branches.

PC Business Units did not exist in PeopleSoft Staffing Front Office 8.8. Therefore, before you map your PeopleSoft Staffing Front Office 8.8 Business Units, you must create those corresponding PC Business Units in PeopleSoft FSCM 9.1.

Be sure to keep a record of the PC Business Unit values that you enter for PeopleSoft FSCM 9.1. You will enter those values for the PeopleSoft Staffing Front Office 8.8 Business Units later in the upgrade.

To enter the PC Business Unit values:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Definition.
2. Create one or more PC Business Units in PeopleSoft FSCM 9.1 based on how you want to map your PeopleSoft Staffing Front Office 8.8 Business Units later in the upgrade.

See PeopleSoft Enterprise 9.1 PeopleBook, PeopleSoft Staffing Front Office for your current release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-2-3: Mapping Skill Type to Competency Type

The Front Office Skills tables used in PeopleSoft Staffing Front Office 8.8 are replaced by the Competency Management and Resource Management Competency tables in PeopleSoft FSCM 9.1. As part of the upgrade process, you have to manually translate your existing skill types from PeopleSoft Staffing Front Office 8.8 to the skill types associated with PeopleSoft FSCM 9.1 competencies.

The source skill type table in PeopleSoft Staffing Front Office 8.8 has Skill Type (6-character length) as its key. The table, Competency Management, in PeopleSoft FSCM 9.1, has a single element key made up of Skill Type (6-character length).

You can choose to keep the same values from your PeopleSoft Staffing Front Office release or change the values during the manual mapping process.

To map Skill Type to Competency Type:

1. Select Set Up Staffing, Upgrade, Skill Type to Skill Type.

The Skill Type to Skill Type page appears.

Skill Type to Skill Type

Customize | Find | View All | First 1 of 1 Last

Skill Type	Skill Type
1	<input type="text"/> + -

Preload Data

Save Notify Add Update/Display






















Skill Type to Skill Type page

2. Click the Preload Data button.

Once the Preload Data button is selected, the page will be automatically populated with values, as shown in the example below. The Skill Type column on the left will be populated with your Skill Type values from PeopleSoft Staffing Front Office 8.8. The right Skill Type column will be populated with the same values as the left column, depicting the values to which your Skill Type values will be mapped. This avoids manual entry of the values, if you find that all values are unique.

Note. The Preload Data button only appears once, the first time the page loads. Once the component is saved, the button will no longer be available.

Skill Type to Skill Type

Customize Find View All  First 1-10 of 19 Last		
Skill Type	Skill Type	
1 ACCTG	ACCTG	 
2 ADMIN	ADMIN	 
3 COMPUT	COMPUT	 
4 EQUIP	EQUIP	 
5 FINANC	FINANC	 
6 FOOD	FOOD	 
7 GOVT	GOVT	 
8 HEALTH	HEALTH	 
9 HR	HR	 
10 INSUR	INSUR	 

Skill Type to Skill Type page; Preloaded Data

- Verify that the right-hand column of Skill Type values (representing the values in PeopleSoft FSCM 9.1) are unique.

If you find a value that is a duplicate of a previous value, change the value to make it unique.

- Once you have verified that the values are unique, click the Save button.

The page will not save if the target values are not unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-4: Mapping Skill Code to Competency

The Skills tables used in PeopleSoft Staffing Front Office 8.8 have been replaced by Competency Management and Resource Management Competency Tables in PeopleSoft FSCM 9.1. As part of the upgrade, you must manually translate your skill codes from PeopleSoft Staffing Front Office 8.8 to competencies in PeopleSoft FSCM 9.1.

The Skill Code table in PeopleSoft Staffing Front Office 8.8 has a two-element key, made up of Skill Type (6-character length) and Skill Code (10-character length). The Competency table in PeopleSoft FSCM 9.1 has a single element key made up of Competency (8-character length).

Competency cannot be generated directly from Skill Code, as the same Skill Code value may appear under various Skill Types in PeopleSoft Staffing Front Office 8.8. Even if the values of Skill Code are distinct in PeopleSoft Staffing Front Office 8.8, the first eight characters of the Skill Code will not ensure uniqueness.

Despite the scenario mentioned above, Competency values will be automatically generated to avoid duplicates and manual entry. If you choose to change the automatically generated values, you must ensure that all values are unique before you save the page.

To map Skill Code and Skill Type to Competency:

1. Select Set Up Staffing, Upgrade, Skill Code to Competency.

The Skill Code to Competency page appears.

Skill Code to Competency

Sequence	Skill Type	Skill Code	*Competency
1			

Preload Data

Save Notify Add Update/Display






















Skill Code to Competency page





2. Click the Preload Data button.

The Skill Type and Skill Code columns will be populated with values from your PeopleSoft Staffing Front Office 8.8 Skill Type-Skill Code combination, as shown in the example below. The Competency column will be populated with the automatically generated values, representing PeopleSoft FSCM 9.1 values.

Note. The Preload Data button only appears once, the first time the page loads. Once the page is saved the button is no longer available.

Skill Code to Competency

Customize Find View All 					First 	1-9 of 9 	Last
	Skill Type	Skill Code	*Competency				
1	ACCTG	A0309	ACCTA030				
2	ACCTG	A05	ACCTA05				
3	ACCTG	A050	ACCTA050				
4	ADMIN	A0001	ADMIN001				
5	ADMIN	A0002	ADMIN002				
6	ADMIN	A0003	ADMIN003				
7	ADMIN	A0004	ADMIN004				
8	ACCTG	A050	TRAINDEV				
9	ACCTG	A050	WELD3				

 Save
 Notify
 Add
 Update/Display

Skill Code to Competency page, Competency values populated

3. If you change any values, ensure they are unique before you save the page.
4. Click the Save button when finished.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-5: Mapping Resource and Order Priority Values

The PeopleSoft Front Office Priority tables used in PeopleSoft Staffing Front Office 8.8 were used for three types of priorities:

- Applicants/Employees
- Orders
- Customers

The priority table in PeopleSoft Staffing Front Office 8.8 has a two-element key made up of User Status (5-character length) and Status Type (4-character length). The Priority table in PeopleSoft FSCM 9.1 has a single element key made up of Priority Code (3-character length).

For each of the Status Types, the first three characters of the User Status values will be extracted to generate new priority code values. In some cases, the generated priority code values will not be unique if the first three characters of two or more User Status fields are the same. In such cases, you must manually resolve the values of the priority codes.

The upgrade process will do the following:

- User Status “Customer” will not be upgraded because it was not used in any component of PeopleSoft Staffing Front Office 8.8.
- User Status “Employees” will be upgraded to Resource Priority table in PeopleSoft FSCM 9.1.
- User Status “Orders” will be upgraded to the Order Priority table in PeopleSoft FSCM 9.1.

The following procedure will instruct you to map the Status Type/User Status to its corresponding priority code.

To map the Status Type/User Status to priority codes:

1. Select Set Up Staffing, Upgrade, User Status to Priority Code.

The User Status to Priority Code page appears.

User Status to Priority Code

Customize | Find | View All | First 1 of 1 Last

Status Type	User Status	Priority Code
1		

+

-

Preload Data

Save Notify Add Update/Display

User Status to Priority Code page

2. Click the Preload Data button.

This button populates the page with the existing Status Type and User Status and the corresponding priority code. The priority code is generated by extracting the first three characters of the User Status field.

Note. The Preload Data button only appears once, the first time the page loads. Once the page is saved, the button is no longer available.

3. Review the priority codes to ensure that each value is unique.

All priority codes should be created as unique values. If a priority code is not unique, manually change it to make it to a unique value. The page will not save if the codes are not unique.

- Once you have reviewed all priority codes, click the Save button.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-6: Mapping Business Unit to Location Code

Front Office Business Units have been replaced by Staffing Branches in PeopleSoft FSCM 9.1. Sometimes, in PeopleSoft Staffing Front Office 8.8 Business Units were referred to as Staffing Branches. However, they were still Business Units by definition. In PeopleSoft FSCM 9.1, Front Office Business Units are treated and referred to only as Staffing Branches.

In PeopleSoft FSCM 9.1, each Staffing Branch needs a corresponding PC Business Unit and Location Code. Therefore, you must map a PC Business Unit and a Location Code for each Front Office Business Unit in PeopleSoft Staffing Front Office 8.8 before the Front Office Business Units are upgraded to Staffing Branches.

To map Front Office Business Units to PC Business Unit and Location Code:

- Select Set Up Staffing, Payroll, Locations.

Make note of these location codes; you will need them later in your upgrade.

- Select Set Up Staffing, Upgrade, FO Business Unit to Branch.

The FO Business Unit To PC Business Unit & Location Code page appears.

FO Business Unit To PC Business Unit & Location Code

[Customize](#) | [Find](#) | [View All](#) |

First ◀ 1 of 1 ▶ Last

Front Office Business Unit	PC Business Unit	Location Code	
1			<div style="display: inline-block; border: 1px solid blue; padding: 2px 5px;">+</div> <div style="display: inline-block; border: 1px solid blue; padding: 2px 5px;">-</div>

Preload Data

Save

Notify

Add

Update/Display

FO Business Unit to PC Business Unit & Location Code page

- Click the Preload Data button.

Note. The Preload Data button only appears once, the first time the page loads. Once the page is saved, the button is no longer available.

FO Business Unit To PC Business Unit & Location Code

Front Office Business Unit	PC Business Unit	Location Code		
1 CA100	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
2 EAST	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
3 GA100	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
4 GA110	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
5 GBIBU	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
6 MDWST	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
7 NWEST	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
8 SF001	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
9 SOCNT	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>
10 SWEST	<input type="text"/>	<input type="text"/>	<input style="width: 20px;" type="button" value="+"/>	<input style="width: 20px;" type="button" value="-"/>

FO Business Unit to PC Business Unit & Location Code page, data loaded

4. For each Front Office Business Unit, enter a PC Business Unit from the list of PC Business Unit values that you previously noted in the task Configuring PC Business Unit earlier in the upgrade.
5. For each Front Office Business Unit, enter the corresponding location code from the list that you noted at the start of this step.

All Front Office Business Units will be upgraded to Staffing Branches in PeopleSoft FSCM 9.1, whether they have a location code mapped or not. Later in the upgrade, you can add or change the location codes.

See “Applying Application Changes,” Configuring Front Office and PayBill, Configure Location for Staffing Branches.

6. Once you have entered all PC Business Units and location codes, click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-7: Mapping Test to Accomplishment

Tests in PeopleSoft Staffing Front Office 8.8 are being replaced by Accomplishments in PeopleSoft FSCM 9.1. If you already use Competency Management tables in PeopleSoft FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some accomplishment values are already present in the new PeopleSoft FSCM 9.1 table. If this is your situation, you must resolve the PeopleSoft Staffing Front Office 8.8 values and the PeopleSoft FSCM 9.1 values so that the PeopleSoft FSCM values do not get overwritten. You must add new accomplishment values to PeopleSoft FSCM 9.1 from PeopleSoft Staffing Front Office 8.8 Test values, or you must map the existing Test values from PeopleSoft Staffing Front Office 8.8 to Accomplishment values in PeopleSoft FSCM 9.1.

If you do not use Competency Management tables in your PeopleSoft FSCM database, you will upgrade your Test values from PeopleSoft Staffing Front Office 8.8 to Accomplishment values in PeopleSoft FSCM 9.1.

To map Test values to Accomplishments:

1. Select Set Up Staffing, Upgrade, Test to Accomplishment.

The Test To Accomplishment page appears.

Test to Accomplishment page

2. Click the Preload Data button.

This populates the Test column on the Test to Accomplishment page with your existing Test Code values from PeopleSoft Staffing Front Office 8.8, and generates the new Accomplishment values in the Accomplishment column.

3. If you are already using the Accomplishments table, proceed to step 4.
Otherwise, save the page and skip the remaining steps.

Note. Ensure that all values are unique. The page will not save until all values are unique.

4. Bring up the Accomplishments of Category Test report that you ran earlier in the upgrade (UPG_FOQ03).
Using the Accomplishment values from the report that represent the values you currently have in your PeopleSoft FSCM database, verify whether any of the Test values from PeopleSoft Staffing Front Office 8.8 already exist in the report. There are three possible scenarios that you may encounter:

- The PeopleSoft Staffing Front Office 8.8 Test code value is already present in your report and both the values refer to the same context (for example 1004 is General Aptitude Test in both PeopleSoft Staffing Front Office and PeopleSoft FSCM).

This requires no action. You can leave the automatically generated values as they are.

- If the Test code value is present in your report and in the Accomplishment column, but the values refer to different contexts (for example, 1004 represents General Aptitude Test in PeopleSoft Staffing Front Office but 1004 represents Programmer's Aptitude Test in PeopleSoft FSCM), then you need to change the corresponding value in the Accomplishment column to a unique value that is not already used in PeopleSoft FSCM (so there isn't a duplicate of the value in the Accomplishment column).
- If the Test code value is not present in your report but there is another Accomplishment in the report referring to the same context that you do have in PeopleSoft Staffing Front Office 8.8 you must change the value in the Accomplishment column to the PeopleSoft FSCM Accomplishment value that represents the same value.

For example, 1009 represents Business English in PeopleSoft Staffing Front Office 8.8 but 1009 is not present on your report because 1009 does not exist or represent Business English in PeopleSoft FSCM. However, on the report 1006 represents Business English. Therefore, you must change the value in the Accomplishment column that corresponds to 1009 (Business English in PeopleSoft Staffing Front Office 8.8) to 1006 (Business English in PeopleSoft FSCM). This maps the Accomplishment value for Business English, in PeopleSoft FSCM, to the value for Business English in PeopleSoft Staffing Front Office 8.8.

5. Save the page.

Note. The page will not save until all values are unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-8: Mapping Degree to Accomplishment

Degrees in PeopleSoft Staffing Front Office 8.8 are replaced by Accomplishments in PeopleSoft FSCM 9.1.

If you already use Competency Management tables in PeopleSoft FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some accomplishment values are already present in the new PeopleSoft FSCM 9.1 table. If this is your situation, you must resolve the PeopleSoft Staffing Front Office 8.8 and PeopleSoft FSCM 9.1 values so that the PeopleSoft FSCM values do not get overwritten during the upgrade. You must add new accomplishment values to PeopleSoft FSCM from PeopleSoft Staffing Front Office 8.8 Degree values or you must map the existing Degree values from PeopleSoft Staffing Front Office 8.8 to Accomplishment values in PeopleSoft FSCM 9.1.

If you do not use Competency Management tables in PeopleSoft FSCM, you will upgrade your PeopleSoft Staffing Front Office 8.8 Degree values to Accomplishment values in PeopleSoft FSCM 9.1.

To map Degree values to Accomplishment values:

1. Select Set Up Staffing, Upgrade, Degree to Accomplishment.
2. Click the Preload Data button.

This will populate the Degree column with your existing Degrees in PeopleSoft Staffing Front Office 8.8 and pre-populate the new Accomplishment values to avoid manual entry.

Only the Degree values that appear here will be mapped to Accomplishment values in PeopleSoft FSCM 9.1.

Note. The Preload Data button only appears the first time this page is opened.

3. If you use the Accomplishments table in PeopleSoft FSCM, proceed to step 4.
Otherwise, save the page and skip all remaining steps.
4. Find the report, “Accomplishments of category Degree” (UPG_FOQ04) that you ran earlier in the upgrade.

Using the existing Accomplishment values found on your report as reference, verify whether any of the PeopleSoft Staffing Front Office 8.8 Degree values (as seen in the Degree column) are listed in the report. If there are duplicates between the values on this page and the report, there are three scenarios and solutions for you to review:

- If the Degree value is already present in the Degree column on this page and in the report and each value represents the same context (for example, BS refers to Bachelors of Science in both PeopleSoft Staffing Front Office and PeopleSoft FSCM), there is no action required.
- If the Degree value is present on this page and in the report but the values refer to different contexts, then you must change the Accomplishment value on the page to correspond to the Degree so that it creates a unique value in PeopleSoft FSCM.

For example, the Degree column lists BT, referring to Bachelor of Theology in PeopleSoft Staffing Front Office 8.8 and the report lists BT as well but in PeopleSoft FSCM BT refers to Bachelor of Technology. In the Accomplishment column next to BT (as seen in the Degree column) you must create a new unique value to represent Bachelor of Theology in PeopleSoft FSCM 9.1. This value must be unique.

- If the Degree value in the Degree column is not a valid value in your report of Accomplishment values, but there is an Accomplishment Value in your report that refers to the same context as the Degree value, you must map the Degree value (in the Degree column) to the correct value in the Accomplishments column, by changing the value in the Accomplishment column.

For example, the Degree value BSL represents Bachelor of Science-Law in PeopleSoft Staffing Front Office 8.8 and BL refers to Bachelor of Science-Law in your report (PeopleSoft FSCM 9.1). On the page, the Degree value will read BSL, and automatically populate BSL for the Accomplishment value to map to. However, these don't represent the same value. Therefore, you must change the BSL that is populated in the Accomplishment column to BL so that the Degree value will map to the correct Accomplishment value.

- Once you have reviewed all new Accomplishment values for PeopleSoft FSCM, click the Save button.
The page will not save if the values are not unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-9: Mapping Major Code

As part of the upgrade, PeopleSoft Staffing Front Office 8.8 Major Code values will be upgraded to Major Code values in PeopleSoft FSCM 9.1.

If you already use Competency Management tables in PeopleSoft FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some major code values that you use for PeopleSoft Staffing Front Office 8.8 are already present in the new PeopleSoft FSCM table. If this is the case, you must resolve the PeopleSoft Staffing Front Office 8.8 and PeopleSoft FSCM values so that the PeopleSoft FSCM 9.1 values do not get overwritten. You will either add Major Code values to PeopleSoft FSCM 9.1 from PeopleSoft Staffing Front Office 8.8 values or map the existing Major Code values in PeopleSoft Staffing Front Office 8.8 to Major Code values in PeopleSoft FSCM.

If you do not use Competency Management tables in PeopleSoft FSCM, you simply upgrade your Major Code values from PeopleSoft Staffing Front Office 8.8 to Major Code values in PeopleSoft FSCM 9.1.

To map PeopleSoft Staffing Front Office Major Codes to PeopleSoft FSCM Major Codes:

- Select Set Up Staffing, Upgrade, Major Code to Major Code.

The Major Code to Major code page appears.

Major Code to Major Code

Customize | Find | View All | First 1 of 1 Last

	Major Code	Major Code	
1			+ -

Preload Data

Save Notify Add Update/Display

Major Code to Major Code page

2. Click the Preload Data button.

This will populate the Major Code column (left column) with your PeopleSoft Staffing Front Office 8.8 values. The right-hand Major Code column is populated with automatically generated values that map to PeopleSoft FSCM 9.1.

Note. The Preload Data button will only appear the first time this page is loaded.

3. If you are already using the Accomplishments table, proceed to step 4.

Otherwise, save the page and skip the rest of these steps.

4. Retrieve the Major Codes (UPG_FQ006) report that you ran earlier in the upgrade.

This report gives you the existing Major Code values in PeopleSoft FSCM. Using this report as a reference, verify whether any of the PeopleSoft Staffing Front Office 8.8 Major Code values (from the left-hand column on this page) already exist in your report. If so, there are three possible scenarios and solutions:

- If the PeopleSoft Front Office 8.8 Major Code (from this page) is already present in your report and the values represent the same context (for example, K000003 refers to Electrical Engineering in both PeopleSoft Staffing Front Office 8.8 and in PeopleSoft FSCM 9.1), no action is required.
- If the Major Code value on this page is already present in your report but the values represent different contexts, then you must change the value of the Major Code on the right-hand column of this page so that the PeopleSoft Staffing Front Office 8.8 Major Code value maps to a new, unique Major Code value in PeopleSoft FSCM 9.1.

For example, K000010 refers to Anthropology in PeopleSoft Staffing Front Office 8.8 and K000010 refers to Business Administration in PeopleSoft FSCM 9.1. In this example, the page would display K000010 in the left hand Major Code column (PeopleSoft Staffing Front Office 8.8 value) and K000010 in the right-hand Major Code column. From your report, you know that in PeopleSoft FSCM K000010 represents Business Administration. Therefore, you would change the K000010 value in the right-hand column to a unique value, creating a new Anthropology Major Code value in PeopleSoft FSCM 9.1.

- If the PeopleSoft Staffing Front Office 8.8 Major Code value is not present in the report but there is a Major Code value in PeopleSoft Staffing Front Office 8.8 that represents the same value as a Major Code value listed in your report, you must change the value in PeopleSoft FSCM (right-hand Major Code column on this page) so that the PeopleSoft Staffing Front Office 8.8 value maps to the correct PeopleSoft FSCM Major Code value.

For example, K000008 refers to French in PeopleSoft Staffing Front Office 8.8 and appears in the left-hand Major Code column. However, K000001 refers to French in PeopleSoft FSCM. Your page will populate with K000008 in the left-hand column mapping to K000008 in the right-hand column. You must change the K000008 to K000001 in the right-hand Major Code column, mapping the K000008 French value in PeopleSoft Staffing Front Office to the K000001 French value in PeopleSoft FSCM.

5. Save the page.

The page will not save until all Major Code values are unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-10: Mapping School Code

As part of the upgrade, Schools in PeopleSoft Staffing Front Office 8.8 are upgraded to Schools in PeopleSoft FSCM 9.1. The School table in PeopleSoft Staffing Front Office 8.8 has a two-element key made up of School Code and Country. The School table in PeopleSoft FSCM 9.1 also has a two-element key made up of School Code and Country.

If you already use Competency Management tables in PeopleSoft FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some school values are already present in the new PeopleSoft FSCM 9.1 table. If this is the case, you must resolve the PeopleSoft Staffing Front Office 8.8 and PeopleSoft FSCM values so that the PeopleSoft FSCM values do not get overwritten. You either add new School values in PeopleSoft FSCM from the School values in PeopleSoft Staffing Front Office 8.8 or you map the existing PeopleSoft Staffing Front Office 8.8 School values to School values in PeopleSoft FSCM.

If you do not use Competency Management tables in PeopleSoft FSCM, you simply upgrade the school values from PeopleSoft Staffing Front Office 8.8 to School values in PeopleSoft FSCM 9.1.

To map PeopleSoft Staffing Front Office School values to PeopleSoft FSCM School values:

1. Select Set Up Staffing, Upgrade, School Code to School Code.

The School Code to School Code page appears.

School Code to School Code

	School Code	Country	School Code	Country
1				

Preload Data

Save Notify Add Update/Display

School Code to School Code page

2. Click the Preload Data button.

This will populate the School Code and Country columns (on the left-hand side of the page) with the PeopleSoft Staffing Front Office 8.8 values. It will also populate the right-hand School Code and Country columns with automatically generated values that will map to PeopleSoft FSCM.

Only the School values listed on this page are being upgraded to PeopleSoft FSCM 9.1.

Note. The Preload Data button only appears the first time this page is loaded.

3. If you are already using the Schools table in PeopleSoft FSCM proceed to step 4.
Otherwise, save this page and skip the remainder of these steps.
4. Retrieve the School Code with Country (UPG_FQ05) report you generated earlier in the upgrade process.

This report lists all of the School Code values as they are set up in your PeopleSoft FSCM database. Using this report as a reference, verify whether any of the PeopleSoft Staffing Front Office 8.8 School Code values (from the left-hand columns on this page) already exist in your report. If so, there are three possible scenarios and solutions:

- If the combination of Front Office School Code and Country code is already present in the report and the values refer to the same context, no action is required.

For example, BEL and KBS003 in combination refer to the University of Antwerp in both PeopleSoft Staffing Front Office 8.8 and in PeopleSoft FSCM. On this page, they should map to each other.

- If the PeopleSoft Staffing Front Office School Code/Country combination (from the left-hand columns on this page) is already present in your report, but the values refer to different contexts in PeopleSoft Staffing Front Office and PeopleSoft FSCM, then you must change the School Code/Country combination (in the right-hand column) to create a unique School Code/Country combination.

For example, BEL and KBS003 refer to the University of Antwerp in PeopleSoft Staffing Front Office 8.8, but BEL and KBS003 refers to University of Belgium in PeopleSoft FSCM. The left-hand column on this page populates BEL and KBS003 for PeopleSoft Staffing Front Office (referring to the University of Antwerp) and in the corresponding right-hand columns, BEL and KBS003 have been automatically populated. From your report, you know that BEL and KBS003 refer to the University of Belgium. Therefore, you must change the right-hand columns to a value unique to PeopleSoft FSCM to refer to the University of Antwerp, such as BEL and KBS010.

- If the PeopleSoft Staffing Front Office 8.8 School Code/Country combination is not present in the report, but there is a School Code/Country combination value listed in your report, then you must change the value in PeopleSoft FSCM (right-hand School Code/Country columns on this page) so that the PeopleSoft Staffing Front Office 8.8 combination maps to the correct PeopleSoft FSCM School Code/Country combination.

For example, BEL and KBS003 refer to the University of Antwerp in PeopleSoft Staffing Front Office 8.8, but BEL and KBS015 refer to the University of Antwerp in PeopleSoft FSCM. You must change the values in the right-hand column (those that correspond to BEL KBS003) from the automatically generated values of BEL and KBS003 to BEL and KBS015. This maps the University of Antwerp in PeopleSoft Staffing Front Office to the University of Antwerp in PeopleSoft FSCM.

5. After reviewing the values, click Save.
The page will not save until all values are unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-11: Printing Translate Values for NAME_PREFIX

The NAME_PREFIX field translate values used in your previous PeopleSoft Staffing Front Office 8.8 release will be replaced by the prompt values of the Salutation Codes table in PeopleSoft FSCM 9.1.

You must manually enter all of your “old” (PeopleSoft Staffing Front Office 8.8) NAME_PREFIX translate values into the setup component of Salutation Codes in PeopleSoft FSCM 9.1, later in the upgrade. In order to complete that step, you will need to make note of the translate values in your PeopleSoft Staffing Front Office 8.8 database.

To look up translate values for NAME_PREFIX:

1. Select PeopleTools, Utilities, Administration, Translate Values.
2. Open the field NAME_PREFIX.
3. Print or save an image of this information for your records.

You will need this data later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-2-12: Printing Translate Values for SCHOOL_TYPE

The SCHOOL_TYPE field translate values used in PeopleSoft Staffing Front Office 8.8 are replaced by the prompt values of the School Type table in PeopleSoft FSCM 9.1.

You must manually enter all of your “old” (PeopleSoft Staffing Front Office 8.8) translate values from the field SCHOOL_TYPE into the setup component of School Type in PeopleSoft FSCM 9.1, later in the upgrade process. Therefore, you need to make note of all translate values for the SCHOOL_TYPE field in your PeopleSoft Front Office database to use for reference.

To look up SCHOOL_TYPE translate values:

1. Select PeopleTools, Utilities, Administration, Translate Values.
2. Open the SCHOOL_TYPE field.
3. Print or save an image of this information for your records.

You will need this information later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-3: Exporting Front Office Data

This section discusses:

- Understanding Front Office Data Export
- Updating Configuration Manager Profile
- Exporting Front Office NonStable Tables
- Exporting Front Office Stable Tables

Understanding Front Office Data Export

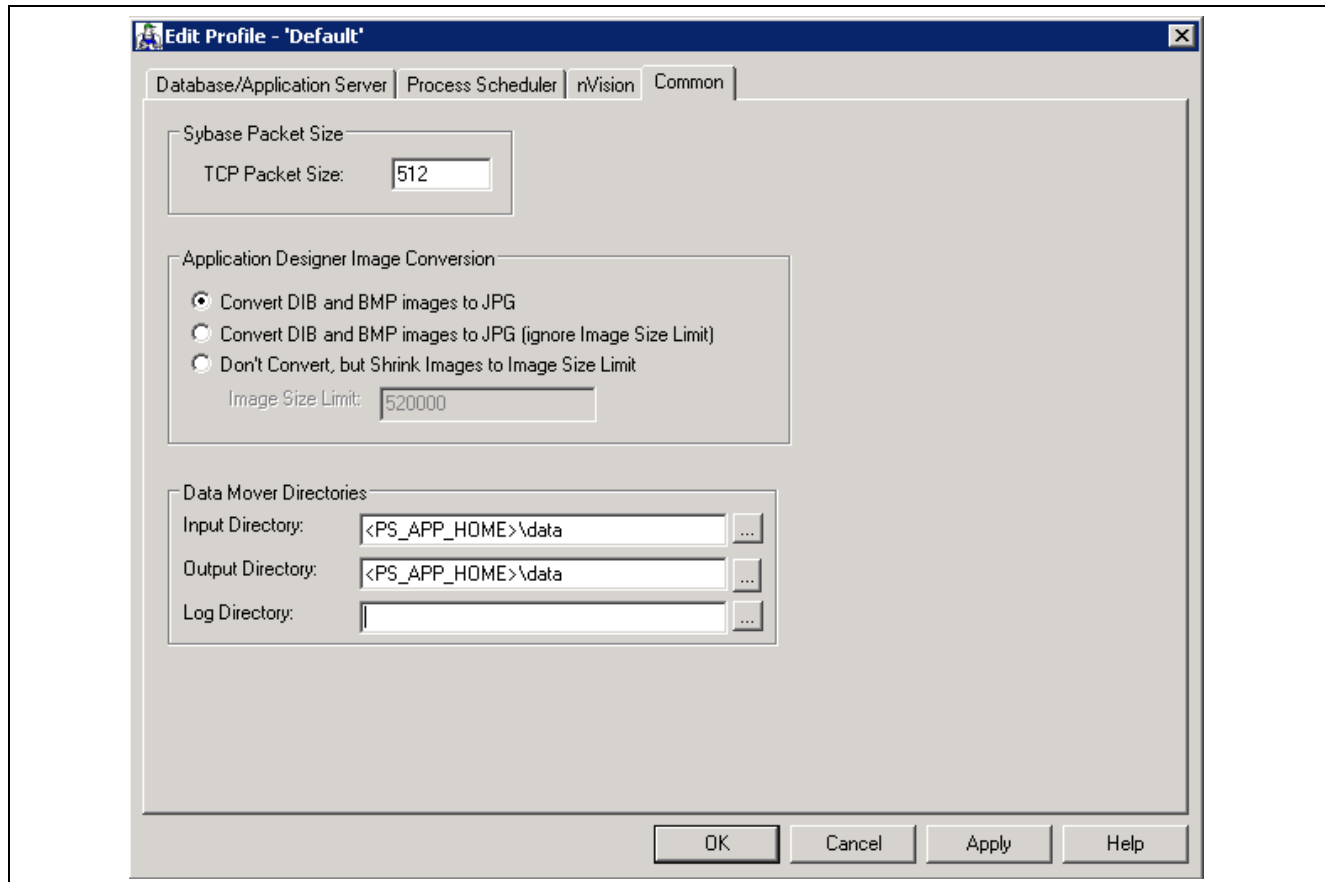
In this task you export your data from your PeopleSoft Staffing Front Office 8.8 database. Later in the upgrade, you will import this data into your PeopleSoft FSCM 9.1 database.

Task 3-3-1: Updating Configuration Manager Profile

The 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 you may use during the upgrade.

To update the profile:

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



Edit Profile – Default dialog box: Common tab

Note. The Input Directory value must be *PS_APP_HOME*\data, where you replace *PS_APP_HOME* with your new codeline installation directory. The Output Directory value must be the same as the Input Directory value.

4. Enter a value to point to the directory where you want your PeopleSoft Data Mover logs to be saved.
 5. Select the Process Scheduler tab and verify your SQR settings.
- PeopleSoft Change Assistant will use these to launch SQR.

Properties

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

Task 3-3-2: Exporting Front Office NonStable Tables

In this step, you will export the non-stable PeopleSoft Staffing Front Office tables from your PeopleSoft Staffing Front Office 8.8 database. This data will later be imported into your PeopleSoft FSCM 9.1 database.

Note. You will run these scripts on your PeopleSoft Staffing Front Office database.

The script for your upgrade is:

PUFOFOR25E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-3-3: Exporting Front Office Stable Tables

In this step, you will export your PeopleSoft Staffing Front Office stable tables from your PeopleSoft Staffing Front Office 8.8 database. This data will be imported into your PeopleSoft FSCM 9.1 database later in the upgrade.

Note. You will run these scripts on your PeopleSoft Staffing Front Office database.

The script for your upgrade is:

PUFOFOR26E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 3-4: Performing General Options Setup

This section discusses:

- Populating UPG_CONV_TBL Table

Task 3-4-1: Populating UPG_CONV_TBL Table

This step runs an import script against your PeopleSoft FSCM 9.1 system database, to populate a row in the UPG_CONV_TBL table. The data reflects what upgrade path you are running. Data conversion uses this data later in the upgrade, to determine what conversions should be run.

The script for your upgrade is:

DLFOFOR33.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-5: Verifying the Upgrade User

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

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

To grant your upgrade user PeopleSoft administrator privileges:

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

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

Properties

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

CHAPTER 4

Applying Application Changes

This chapter discusses:

- Understanding Application Changes
- Importing Front Office Data
- Preparing for Data Conversion Analysis
- Modifying the Database Structure
- Loading Data for Data Conversion
- Applying Updates Before Data Conversion
- Configuring Scheduler and Server
- Backing Up Before Data Conversion
- Running Data Conversion for Front Office
- Backing Up After Data Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports
- Configuring the Upgrade Environment
- Configuring Front Office and PayBill
- Reconfiguring Security
- Backing Up Before Testing
- Testing Your Upgraded System Database

Understanding Application Changes

Earlier in the upgrade, you made various application changes. Now it is time to apply these application changes to your Target database.

Task 4-1: Importing Front Office Data

This section discusses:

- Understanding Front Office Data Import
- Importing Front Office NonStable Tables
- Importing Front Office Stable Tables
- Building Front Office Create Indexes Script
- Running Front Office Create Indexes Script

Understanding Front Office Data Import

In this task you import data from your old PeopleSoft Staffing Front Office database into your installed PeopleSoft FSCM 9.1 database.

Task 4-1-1: Importing Front Office NonStable Tables

In this step, you import the PeopleSoft Staffing Front Office 8.8 non-stable tables that you exported earlier in the upgrade, into your PeopleSoft FSCM 9.1 database.

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
PUEPFOR28I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-1-2: Importing Front Office Stable Tables

In this step, you import the PeopleSoft Staffing Front Office 8.8 stable tables that you exported earlier in the upgrade into your PeopleSoft FSCM 9.1 database.

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
PUEPFOR27I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-1-3: Building Front Office Create Indexes Script

In this step, you generate the SQL script to recreate the indexes for all records in the PeopleSoft Staffing Front Office project.

If you are upgrading from Staffing Front Office 8.8 indexes will be created for the tables in the following project:

```
UPGF02FINTBLS_88
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-1-4: Running Front Office Create Indexes Script

This step runs the SQL script you generated in the previous step, which recreates all the indexes for all records in the PeopleSoft Staffing Front Office project.

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
UPGFO2FINTBLS_88_CRTIDX.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-2: Preparing for Data Conversion Analysis

This section discusses:

- Populating Alter Analyzer Repository
- Building the EOUF_UPGRADE_FRAMEWORK Project
- Running the EOUF_UPGRADE_FRAMEWORK Script

Task 4-2-1: Populating 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	Both	All	All	All

Task 4-2-2: 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 4-2-3: 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 4-3: Modifying the Database Structure

This section discusses:

- Building the Upgrade Tables Script
- Re-Creating Upgrade Tables
- Creating Upgrade Views

Task 4-3-1: 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 4-3-2: Re-Creating Upgrade Tables

This step runs the SQL script you generated to create all tables in the project named UPGCONVERT. The script name for your upgrade path is:

UPGCONVERT_CRTTBL.SQL

Properties

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

Task 4-3-3: 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 4-4: Loading Data for Data Conversion

This section discusses:

- Running Required for Upgrade Data
- Updating the Installation Option

Task 4-4-1: Running Required for Upgrade Data

This step imports the Data Conversion Driver table. The script and .dat file are located on the upgrade page in My Oracle Support. These files should have been saved to your new release codeline at the start of the upgrade.

The script for your upgrade path is:

UPG_REQ_DATA.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-4-2: Updating the Installation Option

This step runs a script to update the installation option on your PeopleSoft FSCM System database (Target) for the PeopleSoft Staffing Front Office upgrade.

The script for your upgrade path is:

```
DLEPFOX34.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-5: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your System 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 System 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. 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	Staffing Front Office	All	All

Task 4-6: Configuring Scheduler and Server

Tips for configuring and starting the application server:

- Make sure the application server domain being configured points to the Target database for this pass of the upgrade.
- Set a different JSL port for each database instance.

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

See Getting Started on Your PeopleSoft Upgrade, “Improving Performance.”

Properties

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

Task 4-7: Backing Up Before Data Conversion

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

Properties

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

Task 4-8: Running Data Conversion for Front Office

In this task you run data conversion on your PeopleSoft Staffing Front Office data that you imported into your PeopleSoft FSCM 9.1 database, using Application Engine UPG_DATCONV.

Properties

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

Task 4-9: Backing Up After Data Conversion

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

Properties

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

Task 4-10: Updating Object Version Numbers

In this task, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Note. Do not update statistics after you complete this task.

Properties

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

Task 4-11: 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 4-11-1: 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 4-11-2: 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 4-11-3: 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 4-11-4: 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 4-11-5: 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 4-11-6: 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 4-11-7: Running the Final SETINDEX Report

The SETINDEX SQR updates index overrides stored in the PSIDXDDLPRM table. The SQR updates the values stored in the PARMVALUE field with current values found in the system catalog. Running SETINDEX cleans up fragmentation issues that may have occurred during data conversion.

Properties

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

Task 4-12: Configuring the Upgrade Environment

This section discusses:

- Configuring the Web Server
- Configuring Portal

Task 4-12-1: 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 4-12-2: 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 4-13: Configuring Front Office and PayBill

This section discusses:

- Understanding Front Office Configuration
- Configuring School Type Values
- Configuring Salutation Table Values
- Running Cache Administration

Understanding Front Office Configuration

This task will guide you through the final setup for your PeopleSoft Staffing Front Office data that now resides in the PeopleSoft FSCM 9.1 database.

In the new release for PeopleSoft Front Office standalone customers, a new PeopleSoft Staffing installation option, *Allow Reactivate Closed Assign*, will be automatically selected during the upgrade. This option enables users with the appropriate permissions to reactivate previously closed assignments. You do not need to perform any action to access this functionality.

Task 4-13-1: Configuring School Type Values

The School Type field is validated based on the contents of a setup table rather than translate values in PeopleSoft FSCM 9.1.

The SCHOOL_TYPE field translate values used in your previous PeopleSoft Staffing Front Office release are replaced by the prompt values of the School Types table in PeopleSoft FSCM 9.1. You must manually configure the School Type component so that the prompt table contains all of the SCHOOL_TYPE translate values from your previous release.

To configure School Type Values:

1. Retrieve the SCHOOL_TYPE field information you found in the step, “Printing Translate Values for SCHOOL_TYPE” in chapter 1 of the upgrade.
2. Select Set Up Financials/Supply Chain, Common Definitions, Resources Data, School Types.
3. Enter a Set ID.
4. In the School Type Code field, enter a translate value for the field SCHOOL_TYPE.
5. In the Description field, enter the “old” (PeopleSoft Staffing Front Office 8.8) Long Name of the translate value.
6. In the Short Description field, enter the “old” Short Name of the translate value.
7. Save the component.
8. Repeat these steps until all PeopleSoft Staffing Front Office 8.8 School Type translate values have been entered into the setup component.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-13-2: Configuring Salutation Table Values

This section discusses:

- Understanding Salutation Table Values
- Configuring Salutation Table Values for Staffing Front Office

Understanding Salutation Table Values

The NAME_PREFIX field translate values used in PeopleSoft Staffing Front Office 8.8 are replaced by the prompt values of the Salutation Codes table in PeopleSoft Staffing Front Office in PeopleSoft FSCM 9.1. You must manually configure the Salutation Codes component so that the prompt tables contain all the translate values from your previous NAME_PREFIX field in PeopleSoft Staffing Front Office 8.8.

Configuring Salutation Table Values for Staffing Front Office

In this step, you configure your Salutation Table values.

To configure Salutation Table values:

1. Retrieve the NAME_PREFIX translate values that you printed earlier in the step titled Printing Translate Values for NAME_PREFIX.
2. Select Set Up Financials/Supply Chain, Common Definitions, Customers, Salutation Table.
3. In the Salutation Code field, enter a translate value from your list of NAME_PREFIX values that you printed out.
4. In the Description field, enter the long name of the translate value as it is in PeopleSoft Staffing Front Office 8.8.
5. In the Short Description field, enter the short name of the translate value as it is in PeopleSoft Staffing Front Office 8.8.
6. Save the page.
7. Repeat steps 2 through 6 for all translate values on your list.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-13-3: Running Cache Administration

In this step, you run a process so that you can see your upgraded Applicants and Employees.

To run the Cache Administration process:

1. Select Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration.
2. Select the Maintain Search Index tab.
3. Select the search type of Staffing.
This enables the Miscellaneous tab.

4. On the Miscellaneous tab, select Maintain Employee Data Cache.
5. Select Create New to run the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-14: Reconfiguring Security

The security model used in your previous PeopleSoft Staffing Front Office database, has changed considerably for PeopleSoft FSCM 9.1 due to the merge of PeopleSoft Staffing Front Office 8.8 into PeopleSoft FSCM 9.1. Therefore, after data conversion, you are required to set up operators, roles, permission lists, and department security tables among other components in the PeopleSoft FSCM 9.1 database to reconfigure security.

See the PeopleTools: Security Administration PeopleBook for your release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 4-15: Backing Up Before Testing

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

Properties

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

Task 4-16: Testing Your Upgraded System Database

In this task, you test your upgraded system database. Testing your upgraded system database will ensure that you can still operate your day-to-day processes on your new release. After you have reviewed your DDDAUDIT and SYSAUDIT, verify that the system is working properly by reviewing the system online. After you are comfortable that the system is working properly, you can perform the Test Move to Production upgrade pass.

See Getting Started on Your PeopleSoft Upgrade, Appendix: “Planning for Upgrade Testing.”

Properties

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

CHAPTER 5

Appendices

Understanding Appendices

The appendices portion of this documentation contains information you may need for your upgrade. The appendices have been referenced throughout the upgrade documentation for further understanding of the upgrade you are performing. Oracle recommends that you read each appendix as it is referenced in the documentation.

APPENDIX A

Applying Fixes Required for Upgrade

This appendix discusses:

- Preparing to Apply Fixes
- Applying Fixes During Installation
- Applying Fixes After Copying Project
- Applying Fixes After Data Conversion
- Applying Fixes Between Upgrade Passes
- Applying Fixes in Move to Production

Task A-1: Preparing to Apply Fixes

This appendix gives general instructions for applying a Required for Upgrade fix for your upgrade. If the directions given in a particular fix are different from those given here, then follow the instructions in the fix.

It is important that you run your upgrade using the latest versions of all upgrade software. On My Oracle Support, check the upgrade page and the patches and updates page to ensure that you have all of the latest code.

Ideally, you should follow the steps below to apply the various files and fixes.

To apply files and fixes:

1. Install the new release from the CD.
2. Apply any additional scripts and projects from the My Oracle Support upgrade page to your new release codeline (and to the New Release Demo database, if applicable).
3. Apply any other Required for Upgrade fixes from My Oracle Support's patches and updates page to your new release codeline (and to the New Release Demo database, if applicable).
4. Run your initial pass of the upgrade.
5. Before you begin each subsequent upgrade pass, check the upgrade page for new versions of any files that you previously applied.

Then check patches and updates for any new Required for Upgrade fixes.

Your initial upgrade pass will differ from your subsequent Test Move to Production passes. Some of the upgrade tasks and steps are common to both the initial upgrade pass and the Move to Production pass. For this reason, you may find Required for Upgrade fixes that do not apply to the upgrade pass that you are currently performing. The details provided with each fix will help you determine whether to apply the fix and when to apply it. The fix will also tell you what to do if you have already passed the step for which the fix is needed.

How you apply a fix depends on where you are in the upgrade process. This appendix explains how to apply a typical fix, and is organized by the various points within the upgrade where you will apply fixes.

Task A-2: Applying Fixes During Installation

In the chapter, “Starting Your Upgrade,” in *Getting Started on Your PeopleSoft Upgrade*, you should first download and apply all files and objects from the upgrade page on My Oracle Support. Then you must download all Required for Upgrade fixes from the patches and updates page on My Oracle Support. You can use the instructions in this section to apply any additional fixes that are posted, until you reach the task, “Running New Release Compare Reports.”

If a fix contains a project that needs to be copied from a file, apply it to your New Release Demo database during installation. If the project contains changes for records or fields, those objects will be updated during the normal compare and copy steps in the upgrade. You will not have to build objects in the project separately or consider whether it will have an impact on customizations. You will do that with the rest of the objects during the upgrade. Apply as many of the fixes as you can at this time.

To apply script fixes during installation:

1. Download Required for Upgrade change packages using the “Download Change Package” functionality in PeopleSoft Change Assistant.
2. Use PeopleSoft Change Assistant to apply the updates into your New Release Demo database.

Review the documentation included with each update prior to applying each update. You may need to perform manual steps to successfully apply the update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, “Applying Updates.”

Task A-3: Applying Fixes After Copying Project

It is best not to apply fixes during the compare and copy tasks in the “Running and Reviewing Compare Reports” and “Applying Application Changes” chapters of the initial upgrade pass. It can also be cumbersome to apply record and field changes during the creating and altering of tables in the “Completing Database Changes” chapter. It is, therefore, best to wait until just before the “Running Data Conversion” task in the “Applying Application Changes” chapter to apply additional fixes. Most of the fixed objects will be data conversion code, delivered in projects.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade change packages using the “Download Change Package” functionality in PeopleSoft Change Assistant.
2. Use PeopleSoft Change Assistant to apply the updates into your New Release Demo database for this upgrade pass.

Review the documentation included with each update prior to applying each update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, “Applying Updates.”

3. The project is now loaded on your New Release Demo database. You should run a project compare to make sure that the objects in the fix will not overwrite any of your customizations.

If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.

4. If you are performing a Move to Production upgrade pass, first migrate the change packages into the Source database for this upgrade pass.

If needed, first set up PeopleSoft Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the change package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply them to your Source database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release, “Applying Updates.”

5. Migrate the change packages into the Target database for this upgrade pass.

If needed, first set up PeopleSoft Change Assistant with the environment information for your Target database.

Task A-4: Applying Fixes After Data Conversion

At this point, you have already converted all of your data for the upgrade pass, and you cannot apply Application Engine program fixes and use them in this upgrade pass. You should refer to the fix instructions to determine what to do in each case. Often, the instructions say that you need to restore your database from a pre-conversion backup and rerun data conversion to get the benefits of the fix. Because this is the only way you can get the fix onto your current Copy of Production, you may decide to allow the error and not apply the fix until you do a Test Move to Production. Then after you have completed that test pass, you can test the affected function. However, you should not do this if your next pass is your final Move to Production, and you are going into production with the resulting database. You should always test your upgraded database between test passes if changes have been made to procedures, scripts, or programs. You do not want any surprises during the final Move to Production.

Task A-5: Applying Fixes Between Upgrade Passes

You can apply fixes just before you start a Test Move to Production pass in the same way you would in the step above, Applying Fixes After Copying Project. In those instructions, you apply the fix to your New Release Demo database and compare it to the Copy of Production. Make sure that you do the database comparison to verify that the fix does not wipe out any customizations you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database. Then apply the fix to your Copy of Production, which you will use as the Source database in the Test Move to Production. The fix will then get moved to your New Copy of Production when you run the MVPRDEXP.DMS and MVPRDIMP.DMS scripts in the “Applying PeopleTools Changes” chapter.

Task A-6: Applying Fixes in Move to Production

Once you have started a Test Move to Production, do not apply any fixes until just before data conversion. Apply any fixes using the previous step, “Applying Fixes After Copying Project.” In those instructions you apply the fix to your New Release Demo database and compare it to your Copy of Production. Instead of using the original Copy of Production as the Target, you must now use your New Copy of Production, the one defined as the Target in your Move to Production PeopleSoft Change Assistant job. Be sure to do the database comparison to verify that the fix does not wipe out any customizations that you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database, then copy the project to your New Copy of Production.

APPENDIX B

Upgrading Front Office and PayBill

Task B-1: Reviewing the Front Office Standalone Upgrade

If you currently only have a PeopleSoft Staffing Front Office database, you will complete what is known as the PeopleSoft Staffing Front Office standalone upgrade. This upgrade will import and upgrade your PeopleSoft Staffing Front Office data out of your old PeopleSoft Staffing Front Office database and incorporate it into your new PeopleSoft Financials/Supply Chain Management 9.1 database. Your PeopleSoft Staffing Front Office objects will be part of the product PeopleSoft Staffing Front Office in PeopleSoft FSCM 9.1, with this upgrade. After you complete this upgrade, and when you are ready to upgrade in the future, you will only need to upgrade your PeopleSoft Financials/Supply Chain Management database.

This is a unique style of upgrade and does not follow the traditional PeopleSoft upgrade process. This follows a model in which you will copy your data out of your old database and into a brand new database before running data conversion.

APPENDIX C

Using Data Conversion Utilities

This appendix discusses:

- Understanding Data Conversion Utilities
- Using the UPGDATA CONV Process
- Using the EO Upgrade Framework Process
- Using the Upgrade Driver Program
- Using the Upgrade Drivers Page

Understanding Data Conversion Utilities

The Upgrade Data Conversion Application Engine Programs are organized into a series of Drivers or Groups 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_DATA CONV and the PS_UPG_DATA CONV table.

This appendix also contains information regarding the EO Upgrade Framework. The EOUP 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 C-1: Using the UPGDATA CONV Process

This section discusses:

- Understanding the UPGDATA CONV Process
- Reviewing the Data Conversion Report

Understanding the UPGDATA CONV Process

To run all PRE and POST data conversions, Oracle has provided the Application Engine program UPG_DATA CONV. This program runs the Application Engine sections defined in the table PS_UPG_DATA CONV.

Task C-1-1: Reviewing the Data Conversion Report

Each of the upgrade data conversion sections contains comments that describe the processing performed by the section. Oracle delivered an SQR to list all of these comments by the group and sequence numbers that determine how they run. The name of this report is UDATAACNV.

To run UDATAACNV:

1. Using SQRW, run SQR UDATAACNV on your Copy of Production database.
2. When prompted for upgrade path, enter:

FO8X
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 C-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 EOUFDATAACNV
- Reviewing EO Upgrade Framework Reporting

Task C-2-1: Understanding the EO Upgrade Framework Process

With the PeopleSoft 9.1 application release, EOUP 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 EOUP process uses many pieces of the previous style data conversion delivered in PeopleSoft 9.0 applications and lower. For example, the EOUP process uses the AE section grouping and sequencing in the PS_UPG_DATAACNV table for its dependency modeling. With the introduction of EOUP, we have also introduced new terminology – *root or top section*. A *root or top section* is an AE section defined in PS_UPG_DATAACNV. 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 EOUP 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 EOUP: initial and dependency. This section will describe both analysis types in detail.

Task C-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 EOUP process is the EOUPANALYSIS Application Engine, also known as the AE Analyzer. EOUPANALYSIS 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, EOUPANALYSIS 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_EOUP_ANALYSIS table for each AE Section, Step, and Action it comes across. EOUPANALYSIS maintains a counter as it goes and increments the counter as it writes each Action to the PS_EOUP_ANALYSIS table. By the end of this first task, the PS_EOUP_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_EOUP_ANALYSIS table and ordering by EOUP_AESTMTSEQ, the whole will be described, including any nested call sections.

It is important to note that the PS_EOUP_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 EOUP 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 EOUPANALYSIS 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 EOUPANALYSIS 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_EOUP_DTLIDSQLS, which stores a reference to PS_EOUP_ANALYSIS, along with the SQL statements associated with each Step Action. In the case of PeopleCode, there may be many rows in the PS_EOUP_DTLIDSQLS table for each PeopleCode reference in PS_EOUP_ANALYSIS. In addition, a second shadow table, called PS_EOUP_DTLIDSQLSR, is also populated during action type analysis. The only difference between PS_EOUP_DTLIDSQLS and PS_EOUP_DTLIDSQLSR is that PS_EOUP_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')	<ul style="list-style-type: none"> • UPDATE %TABLE(BN_834_MEMBER) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D') • UPDATE %TABLE(DEP_BEN_EFF) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D') • UPDATE %Table(EMERGENCY_CNTCT) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D')

- For invalid SQL statements in PeopleCode, add an override line directly above the invalid SQL to manually document the Source and Target tables that are in use.

Note. There is no override option for Application Engine SQL steps that are marked as invalid.

Note. Entering inaccurate or incomplete information in the override statement may result in data conversion sections being run in the incorrect dependent order, which can produce incorrect conversion results, such as data errors.

Note. Tables defined in the override statement require the *PS_* prefix.

Correct = PS_JOB

Incorrect = JOB

The following table gives sample override lines for various situations:

Syntax	Sample Override Lines
When Source and Target tables are explicitly known and static	<p>For example:</p> <ul style="list-style-type: none">• REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:<SRC Table>,<SRC Table>;• REM SQLANALYSIS:T::S:<SRC Table>,<SRC Table>;• REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S;;

Syntax	Sample Override Lines
When Source and/or Target Tables are determined based on a query	<p>For example:</p> <ul style="list-style-type: none"> • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:[table name]; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T::S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S;; <p>Where:</p> <p><i>SQLid</i>: Specify the name of an existing SQL definition.</p> <p><i>paramlist</i>: Specify a list of arguments for dynamic substitutions at runtime. The first argument replaces all occurrences of %P(1) in the referenced SQL definition, the second argument replaces %P(2), and so forth.</p> <p>Note. The paramlist arguments must be static values. Variable values in the paramlist are not permitted.</p> <p>Note. The Query is resolved at the time the Data Conversion Analysis is executed. It is NOT resolved during the Data Conversion Runtime.</p> <p>Note. The Query must return one or more valid RECNAME values. No other return results are permitted.</p>
Where there is no Source or Target table to be defined an/or the invalid SQL is to be excluded from the table and dependency analysis.	<p>REM SQLANALYSIS:T::S:PS_EOUF_NORECNAME;</p> <p>Note. The “REM SQLANALYSIS:T::S;” syntax is not a valid override and will be marked as “Invalid” by the EOUFANALYSIS Program.</p>

- Leave the SQL as it is. This results in the invalid SQL being marked as “dependent” on all steps that exist prior to it, and all steps subsequent to the invalid SQL become dependent on it.

Note. This will likely result in slowing the runtime of data conversion and is *not* recommended.

Reviewing the Data Conversion Repositories

The tables in the Data Conversion Analysis repository hold the following data:

- Step actions stored in execution order.
- SQL clauses extracted from step actions.
- Tables featured in SQL clause.
- Bind variables used in SQL.

Analysis information is stored in the following tables:

- PS_UPG_DATACONV
- PS_EOUF_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 C-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	<pre>%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</pre>

DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBS10A.Step050.	HCBS10	<pre>%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)</pre>

DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBS10A.Step050.S	HCBS10	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)
HCBS20.Step010.D	HCBS20	%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 C-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.

- EOUFDATA CONV 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 C-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 C-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 C-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 C-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. Select Set Up Staffing, Upgrade, Upgrade AE Documentation.
4. Enter your upgrade path:

FO8X

5. Click Search.

The Upgrade Drivers page appears, as shown in the example below. Following the example of the Upgrade Drivers page are descriptions for each section of the page.

Upgrade Drivers									
Customize Find View All First 1-25 of 86 Last									
Upgrade Path	Program Name	Group #	Section	Sequence	Active Flag	Description	Comments		
CR80	UPG_CDM	1	CDMA010	10	Active	General Preparation	Comments	+	-
CR80	UPG_CDM	1	CDMX140	20	Active	Upgrade Basic Data Tables	Comments	+	-
CR80	UPG_CP	2	CPA00	100	Active	Upgrade Constraint	Comments	+	-
CR80	UPG_CP	2	CPA01	105	Active	Upgrade User Cd Dett	Comments	+	-

Upgrade Drivers page

- **Upgrade Path.** This field contains the upgrade path on which the section will be run.
- **Program Name.** This is the Application Engine program that contains the section.
- **Group #.** This is the group number. All sections with the same group number will be run during the same run of the UPG_DATACONV Application Engine program.
- **Section.** This is the section that will be called from the UPG_DATACONV Application Engine program.
- **Sequence.** This is the order in which the sections will be called during the run of UPG_DATACONV for the group number.
- **Active Flag.** This field determines whether the section will be run. If the value of this field is *Active*, the section will be run. If the value is *Inactive*, it will not be run. If you need to remove a section, change the value in this field to *Inactive*.
- **Description.**

- Comments.

Task C-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 C-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:

FO8X

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

Index

A

- Alter Audit
 - final, reviewing 46
 - final, running 46
- application engine
 - PTALTANLYZR 39
- application servers
 - configuring 43
- applying
 - fixes after copying project 56
 - fixes after data conversion 57
 - fixes between upgrade passes 57
 - fixes during installation 56
 - fixes during Move to Production 58
 - fixes, required for upgrade 4
 - PeopleTools patches 2
 - updates before data conversion 42
 - UPGOPTFO project 14
 - upgrade planning files 13
- audits
 - DDDAUDIT, final 45
 - final 44
 - SYSAUD01, final 45
 - SYSAUDIT, final 45

B

- backing up
 - after data conversion 44
 - before conversion 43
 - before testing 51
- billing
 - management 10
- building
 - create upgrade tables script 40
 - EOUF_UPGRADE_FRAMEWORK 39
 - Staffing Front Office create indexes script 38
 - UPGOPT project 14
- Business Units to Location Codes
 - mapping 23

C

- Cache Administration process
 - running 50

- Change Assistant
 - configuring 6
 - creating a job 6
 - upgrade step properties 7
- Change Assistant, installing 3
- configuring
 - application servers 43
 - Change Assistant 6
 - Pay/Bill Management 48
 - Portal 47
 - Process Scheduler 43
 - Project Costing Business Units 16
 - Salutation Table values 49
 - School Type values 49
 - Staffing Front Office 48
 - upgrade environment 47
 - web server 47
- create indexes
 - building Staffing Front Office script 38
 - running Staffing Front Office script 39
- creating
 - FNLALTAUD project 45

D

- data conversion
 - analysis 39
 - applying updates before 42
 - backing up after 44
 - loading data 41
- data conversion analysis
 - preparing 39
- data conversion report, reviewing 62
- database structure, modifying 40
- DDDAUDIT script
 - final, running 45
- Degrees to Accomplishments
 - mapping 26
- DLEPFOX34.DMS script 42
- downloading
 - installation guides 1

E

- EOUF_UPGRADE_FRAMEWORK
 - building 39
 - running 40

exporting

- Staffing Front Office data 33
- Staffing Front Office non-stable tables 34
- Staffing Front Office stable tables 35

F

- final audit reports, running 44
- fixes
 - applying after copying project 56
 - applying after data conversion 57
 - applying between upgrade passes 57
 - applying during installation 56
 - applying during Move to Production 58
- fixes, required for upgrade 4
 - See Also* patches
 - applying 4
 - downloading with Change Assistant 4
- FNLALTAUD project, creating 45
- FO, *See* Staffing Front Office
- FO Business Unit to PC Business Unit & Location Code page
 - mapping Business Units to Location Codes 23
- Front Office, *See* Staffing Front Office

G

- general options, performing setup 35
- getting started 13

I

- installation flag for Pay/Bill Management
 - verifying 16
- installation flag for Staffing Front Office
 - verifying 16
- installation option
 - updating for Staffing Front Office
 - upgrade 42
- installation options, verifying 16
- installation, applying fixes during 56
- installing
 - Change Assistant 3
 - new release 1
 - PeopleTools 1
 - product 1

L

- loading
 - data for data conversion 41

M

- Major Code to Major Code page
 - mapping Major Codes 28
- Major Codes
 - mapping 28
- management, billing and order 10
- mapping
 - Business Units to Location Codes 23
 - Degrees to Accomplishments 26
 - Major Codes 28
 - Resource and Order Priority values 21
 - School Codes 30
 - Skill Codes to Competency values 20
 - Skill Types to Competency Types 17
 - Tests to Accomplishments 25
- mapping Business Units to Location Codes
 - FO Business Unit to PC Business Unit & Location Code page 23
- mapping Degrees to Accomplishments
 - Degree to Accomplishment page 27
- mapping Major Codes
 - Major Code to Major Code page 28
- mapping Resource and Order Priority values
 - User Status to Priority Code page 22
- mapping School Codes
 - School Code to School Code page 30
- mapping Skill Codes to Competency values
 - Skill Code to Competency page 20
- mapping Skill Types to Competency Types
 - Skill Type to Skill Type page 17
- mapping Tests to Accomplishments
 - Test to Accomplishment page 25
- modifying
 - database structure 40

N

- NAME_PREFIX, translate values 32
- non-stable tables, exporting Staffing Front Office 34
- notes and tips, for your upgrade 10

O

- object version numbers, updating 44
- order, management 10

P

- patches 2
 - See Also* fixes, required for upgrade

- Pay/Bill Management
 - configuring 48
 - Salutation Table values, configuring 49
- PeopleTools
 - applying patches 2
 - installing 1
- performing
 - general options setup 35
- populating, UPG_CONV_TBL 35
- Portal
 - configuring 47
- printing
 - translate values for NAME PREFIX 32
 - translate values for SCHOOL TYPE 32
- Process Scheduler
 - configuring 43
- Project Costing Business Units
 - configuring 16
- properties table 7
- PTALTANLYZER 39

R

- release, new
 - installing 1
- Resource and Order Priority values
 - mapping 21
- reviewing
 - Alter Audit, final 46
- running
 - Alter Audit, final 46
 - audits 44
 - Cache Administration process 50
 - create upgrade tables script 41
 - data conversion for Front Office 43
 - DDDAUDIT script, final 45
 - EOUF_UPGRADE_FRAMEWORK 40
 - SETINDEX script 47
 - Staffing Front Office create indexes script 39
 - SYSAUD01 script, final 45
 - SYSAUDIT script, final 45

S

- Salutation Table values
 - configuring 49
 - configuring for Staffing Front Office 50
- School Code to School Code page
 - mapping School Codes 30

- School Codes, mapping 30
- School Type values, configuring 49
- SCHOOL_TYPE, translate values 32
- script
 - running create upgrade tables 41
- scripts
 - building create upgrade tables 40
- security, reconfiguring 51
- servers
 - application servers 43
- SETINDEX script 47
- setting up
 - Staffing Front Office 15
- Skill Code to Competency page
 - mapping Skill Codes to Competency values 20
- Skill Codes to Competency values
 - mapping 20
- Skill Type to Skill Type page
 - mapping Skill Types to Competency Types 17
- Skill Types to Competency Types
 - mapping 17
- software installation
 - verifying 9
- stable tables, exporting Staffing Front Office 35
- Staffing Front Office
 - configuring 48
 - configuring Salutation Table values 50
 - Salutation Table values, configuring 49
 - setting up 15
 - Staffing queries 15
- Staffing Front Office data
 - exporting 33
- Staffing queries and reports
 - UPG_FOQ03, Accomplishments with category Test 26
 - UPG_FOQ04, Accomplishments with category Degree 27
 - UPG_FOQ05, School Code with Country 31
 - UPG_FOQ06, Major Codes 29
- SYSAUD01 script
 - running final 45
- SYSAUDIT script
 - running final 45

T

- Test to Accomplishment page

- mapping Tests to Accomplishments 25
- testing
 - backing up before 51
 - upgraded System database 51
- Tests to Accomplishments
 - mapping 25
- translate values
 - looking up 32
 - NAME PREFIX 32
 - printing 32
 - SCHOOL TYPE 32
- translate values for NAME PREFIX
 - printing 32
- translate values for SCHOOL TYPE
 - printing 32

U

- updates
 - applying before data conversion 42
- updating
 - object version numbers 44
- UPGDATACONV process, using 61
- UPGOPT project
 - applying Staffing Front Office 14
- UPGOPTFO project
 - building 14
- upgrade
 - configuring environment 47
 - database preparation 13
 - databases, defined 10
 - getting started 13
 - notes and tips 10
 - step properties 7
- Upgrade Drivers page
 - accessing 82
 - adding new section 83
 - inactivating section 83
 - using 81
- upgrade files, retrieving and applying 3
- upgrade planning files, applying 13
- upgrade views
 - creating 41
- upgraded System database
 - testing 51
- User Status to Priority Code page
 - mapping Resource and Order Priority values 22

V

- verifying
 - installation flags 16
 - software installation 9
 - upgrade user 36

W

- web server
 - configuring 47

