

PeopleSoft®

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PeopleTools 8.42  
Administration Tools  
PeopleSoft Upgrade Assistant

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November 2002

PeopleTools 8.42  
Administration Tools  
PeopleSoft Upgrade Assistant  
SKU TOOLS842UGA-B 1102

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# About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

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## PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

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## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

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## Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

### Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

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**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

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### See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

### Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

### Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

## Telephone

Contact CPI at 800 888 3559.

## Email

Send email to CPI at [psoftpress@cc.larwood.com](mailto:psoftpress@cc.larwood.com).

## See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

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# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

## Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&amp;G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

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**Note.** Example of a note.

---

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

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**Important!** Example of an important note.

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## Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

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**Warning!** Example of a warning.

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## Comments and Suggestions

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

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

Or send email comments to [doc@peoplesoft.com](mailto:doc@peoplesoft.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

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## Common Elements in These PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
<b>Once, Always, and Don't Run</b>	Select <b>Once</b> to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <b>Don't Run</b> . Select <b>Always</b> to run the request every time the batch process runs. Select <b>Don't Run</b> to ignore the request when the batch process runs.

<b>Report Manager</b>	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
<b>Process Monitor</b>	Click to access the Process List page, where you can view the status of submitted process requests.
<b>Run</b>	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
<b>Request ID</b>	An ID that represents a set of selection criteria for a report or process.
<b>User ID</b>	An ID that represents the person who generates a transaction.
<b>SetID</b>	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
<b>Short Description</b>	Enter up to 15 characters of text.

### **See Also**

*Using PeopleSoft Applications*

*PeopleSoft Process Scheduler*

# PeopleSoft Upgrade Assistant Preface

This documentation describes how to install and use PeopleSoft Upgrade Assistant. PeopleSoft Upgrade Assistant also contains a template (based on your purchased product) with the upgrade steps included. This chapter shows you how to:

- Load the Upgrade Template
- Set up step properties
- Run upgrade processes
- Configure certain upgrade processes

---

## PeopleSoft Upgrade Assistant

PeopleSoft Upgrade Assistant helps to assemble and organize all of the steps necessary to complete your upgrade. Upgrade Assistant can run some of the steps automatically, while others may require you to make changes manually. To run an upgrade using Upgrade Assistant, you must have an Upgrade Template and an Upgrade Job. For PeopleSoft supported upgrades, PeopleSoft provides pre-defined Upgrade Templates on Customer Connection. These templates comprise all of the steps necessary to complete an upgrade for a supported upgrade path. Some of the steps you see in the template may not apply to you depending on your configuration.

You must be familiar with all the PeopleTools used during the Upgrade process including PeopleSoft Application Designer, Data Mover, SQR, Application Engine, and so on. You also need to understand the configuration necessary to use these tools.



# CHAPTER 1

## Introducing PeopleSoft Upgrade Assistant

This chapter provides an overview of PeopleSoft Upgrade Assistant and discusses how to:

- Use the Upgrade Template view.
- Use the Job Status view.

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### Understanding Upgrade Assistant

PeopleSoft Upgrade Assistant helps to assemble and organize all of the steps necessary to complete your upgrade. Upgrade Assistant can run some of the steps automatically, while others may require you to make changes manually. To run an upgrade using Upgrade Assistant, you must have an Upgrade Template and an Upgrade Job. For PeopleSoft supported upgrades, PeopleSoft provides pre-defined Upgrade Templates on Customer Connection. These templates comprise all of the steps necessary to complete an upgrade for a supported upgrade path. Some of the steps you see in the template may not apply to you depending on your configuration.

To run a process using the Upgrade Assistant, you use an Upgrade Job that is associated with an Upgrade Template. This Upgrade Job provides a set of filtered steps that are specific to your upgrade and relevant only to the release, platform, and products you are using. The Upgrade Job view displays the status of each step and allows you to view log files and modify and restart steps.

In addition to managing the steps required to complete your upgrade, the Upgrade Assistant presents the documentation associated with each particular step.

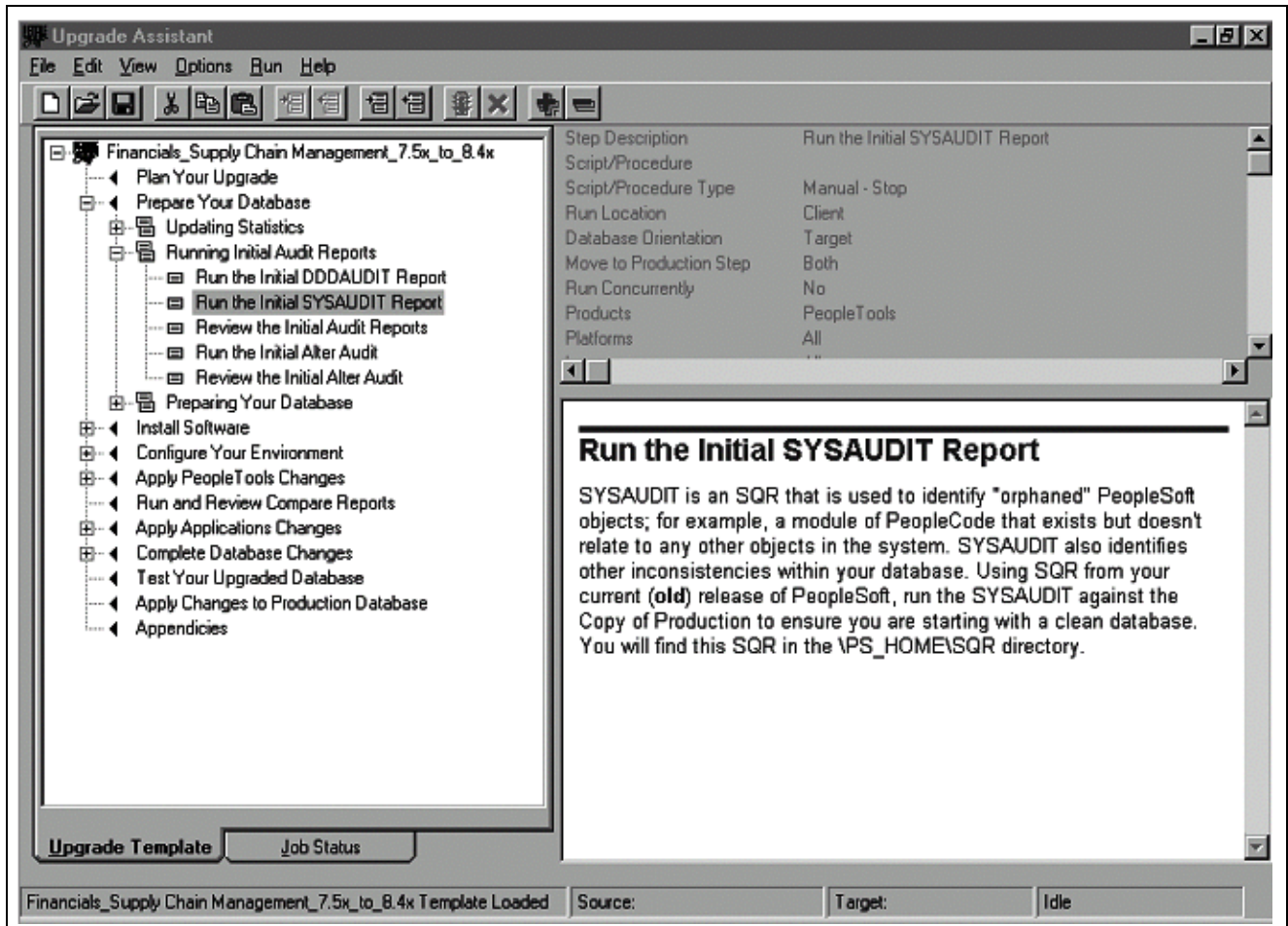
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### Using the Upgrade Template View

The Upgrade Template view is where you import the upgrade template and set the step properties. In this section, we discuss the different sections or areas of the Upgrade Template view:

- Template Tree
- Step Details
- Documentation
- Toolbar Menus

Access the Upgrade Template view.



Upgrade Template view

## Template Tree

The Template Tree section displays the chapter, tasks, and steps for your selected upgrade product and uses the following structure:

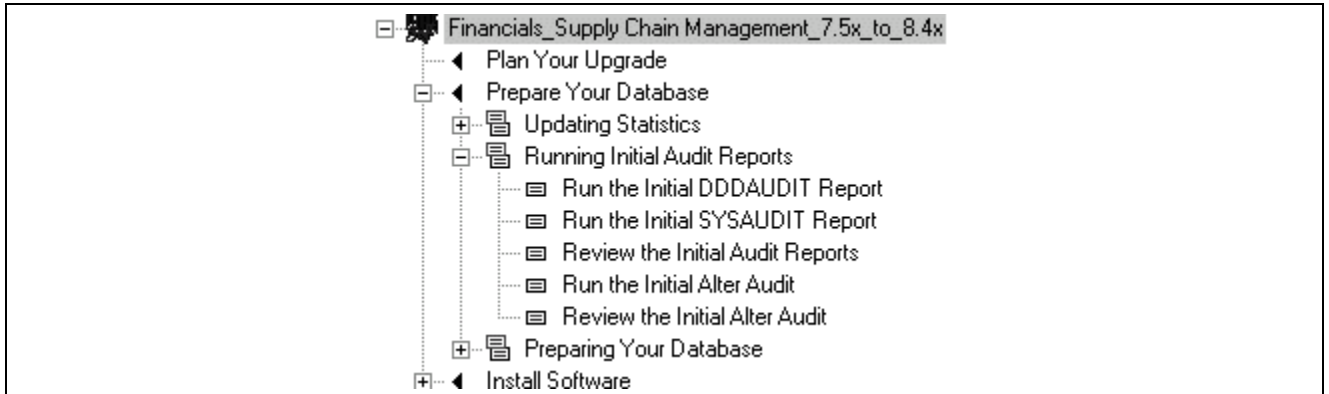
- Chapters are section dividers that display the tasks within the chapter.
- Tasks are section levels that contain one or more steps.
- Steps are the actual upgrade steps you select to set up and run your upgrade job.

---

**Note.** During the upgrade process, you assign properties at the step level, not the task level.

---

The following example displays the structure in the Template Tree:



Template Tree structure

## Step Details

This Step Details section displays the default properties assigned to each step, and the step properties you designate for each step. When you assign properties for a step in the upgrade, PeopleSoft Upgrade Assistant displays the selected properties in this section, as shown in the following illustration.

Step Description	Run the Initial DDDAUDIT Report
Script/Procedure	
Script/Procedure Type	Manual - Stop
Run Location	Client
Database Orientation	Target
Move to Production Step	Both
Run Concurrently	No
Products	PeopleTools
Platforms	All

Selected properties for a step

## Documentation

This section displays the instructions for the current task or step. When you select a chapter, task, or step from the Template Tree, PeopleSoft Upgrade Assistant displays the corresponding documentation.

---

**Note.** You can also download printed instructions for your upgrade on Customer Connection, Implement, Optimize, + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts, Release, choose the PeopleSoft release you are upgrading to.

---

## Toolbar Menus

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

<b>File Menu Item</b>	<b>Description</b>
New Upgrade Template	Select this option to create your own upgrade template. After creating your own template, you can insert steps, scripts, and procedures to configure your upgrade.
Open Upgrade Template	Select this option to load a PeopleSoft-delivered template for your upgrade product. When you select this option, PeopleSoft Upgrade Assistant loads the template with your selected upgrade product line.
Save Upgrade Template	Select this option to save your upgrade template and the properties and configurations you have designated for the template.
Save Upgrade Template As...	Select this option to save your upgrade template as a filename specified by the user and the properties and configurations you have designated for the template.
Close	Select this option to close the current template.
Print	Select this option to Print the current template.

<b>Item Menu Item</b>	<b>Description</b>
Insert Chapter	Enables you to insert a chapter into an upgrade template.
Delete Chapter	Enables you to delete a chapter from an upgrade template.
Insert Task	Enables you to insert a task into an existing or new upgrade template. A task serves as a section head for one or more steps.
Delete Task	Enables you to delete a task from an upgrade template.
Step Properties	Enables you to set step properties for each step in the upgrade. On the Step Properties dialog box, you specify properties that determine the conditions that apply when you run the upgrade process.
Insert Step	Enables you to insert a step into an upgrade template.
Delete Step	Enables you to delete a step from an upgrade template.

Item Menu Item	Description
Rename	Enables you to rename an existing task or step in an upgrade template.
Set Documentation Directory	Enables you to specify the directory into which your upgrade documentation is saved. The PeopleSoft Upgrade Assistant loads the documentation for viewing during the upgrade process.

View Menu Item	Description
Step Details	Select this option to view the properties assigned to the step.
Documentation	Select this option to view the upgrade documentation.
Expand All	Enables you to expand all tasks and steps for viewing in the template.
Collapse All	Enables you to collapse all tasks and steps in the template. When you select this option, PeopleSoft Upgrade Assistant displays the chapter names only.

Option Menu Item	Description
Upgrade Assistant	Enables you to specify general settings and email settings.
Merge Templates	Enables you to merge an existing upgrade template with a new upgrade template.

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## Using the Job Status View

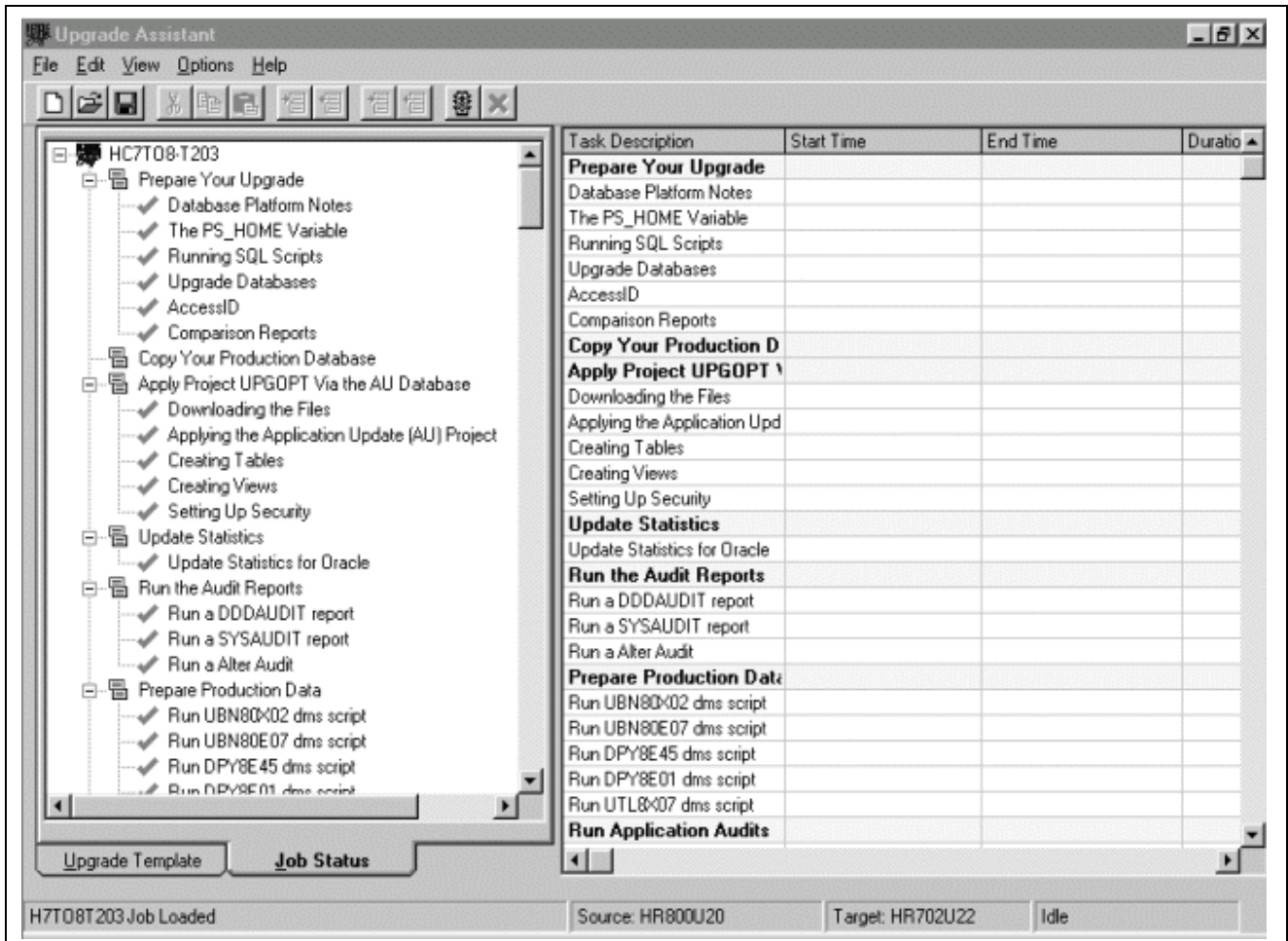
On the Job Status view, you configure the upgrade to run the upgrade process. On this tab, you can create a new upgrade job, open an existing upgrade job, run the upgrade process, and view the job status of each step in the upgrade.

In this section, we discuss the different sections or areas of the Job Status view:

- Job Tree
- Status Grid

- Documentation
- Toolbar Menus

The following illustrates a typical upgrade job:



Job Status view

## Job Tree

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



The green Run icon indicates that PeopleSoft Upgrade Assistant runs this step or process.



The red Stop icon indicates that PeopleSoft Upgrade Assistant stops on this process.



The Restart icon indicates that PeopleSoft Upgrade Assistant stops on these processes and you must restart the Upgrade Assistant after you complete the manual process.



The Processing icon indicates that the process is running.



The Error icon indicates an error.



The Complete icon indicates that the step is finished.

## Status Grid

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

Column	Description
Comments	The <i>Lookup</i> icon indicates comments that exist for the step.
Task Description	When you highlight a task or step in the Template Tree section, PeopleSoft Upgrade Assistant displays the task or step name in the Status Grid.
Start Time	Indicates the run start time of the step or process.
End Time	Indicates the run end time of the step or process.
Duration	Indicates the run duration of the step or process.
Total Duration	Indicates the run duration of all steps you have run up to that point in the upgrade.
Status	Indicates the current status of the step or process. For example:  <code>run, stop, complete</code>

## Documentation

This section enables you to view the documentation relevant to the current step. You can control the settings for this section through the View menu.

## Activity

This section enables you to view current activity for the current step. The Upgrade Assistant automatically displays the last 10 lines of the log file as indicated by the step.

## Toolbar Menus

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

File Menu Item	Description
New Upgrade Job	Enables you to create a new upgrade job from an existing upgrade template.
Open Upgrade Job	Enables you to open an existing upgrade job.
Save Upgrade Job	Enables you to save changes to your current upgrade job.
Filter Upgrade Documentation to File	Generates an HTML file that contains the documentation that pertains to the Upgrade Job.
Export Job to Excel	Exports Job information to an Excel file you specify.

Edit Menu Item	Description
Set Documentation Directory	Enables you to specify the directory into which your upgrade documentation is stored. PeopleSoft Upgrade Assistant loads the upgrade documentation for viewing during the upgrade process.
Run	Enables you to change the status of a step or process to <i>Run</i> .
Stop	Enables you to change the status of a step or process to <i>Stop</i> .
Restart	Enables you to change the status of a step or process to <i>Manual</i> .
Complete	Enables you to change the status of a step or process to <i>Complete</i> .
View Log	Enables you to view output generated from running the step.

Edit Menu Item	Description
View Script	Enables you to view original and modified script files.
View/Edit Job Properties	Enables you to modify the Start and End Times, modify the Status, and add Comments to specified steps within a job.

View Menu Item	Description
Job Details	Enables you to view the Job details for the current chapter, task or step.
Documentation	Enables you to view the documentation for the current task or step. When you select this option, PeopleSoft Upgrade Assistant opens the Documentation window.
Activity	Enables you to view the activity for the current step.
Expand All	Enables you to expand all tasks and steps for viewing in the template.
Collapse All	Enables you to collapse all tasks and steps in the template. When you select this option, PeopleSoft Upgrade Assistant displays the chapter names only.

Options Menu Item	Description
Database Configuration	Enables you to set the database configuration, specify directories and products, set profiles and run locations, and specify import and export settings.
Upgrade Assistant	Enables you to specify email settings to automatically notify you of any errors encountered during the upgrade process. You must specify a Log Editor and HTML browser.
Merge Templates	Enables you to merge an existing upgrade template with a new upgrade template. This option is used primarily for maintenance releases.

<b>Run Menu Items</b>	<b>Description</b>
Start	Starts processing of the steps that are defined to run in the Upgrade Job.
Cancel	Cancels processing of the steps that are defined to run in the Upgrade Job.

## CHAPTER 2

# Installing PeopleSoft Upgrade Assistant

This chapter describes how to:

- Install the Windows NT 4.0 Service Pack.
- Install PeopleSoft Upgrade Assistant.

---

**Note.** Windows NT 4.0 or Windows 2000 workstations are required to use PeopleSoft Upgrade Assistant to perform your upgrade. Additionally, you must install Microsoft Internet Explorer version 5.0 or higher on the workstation.

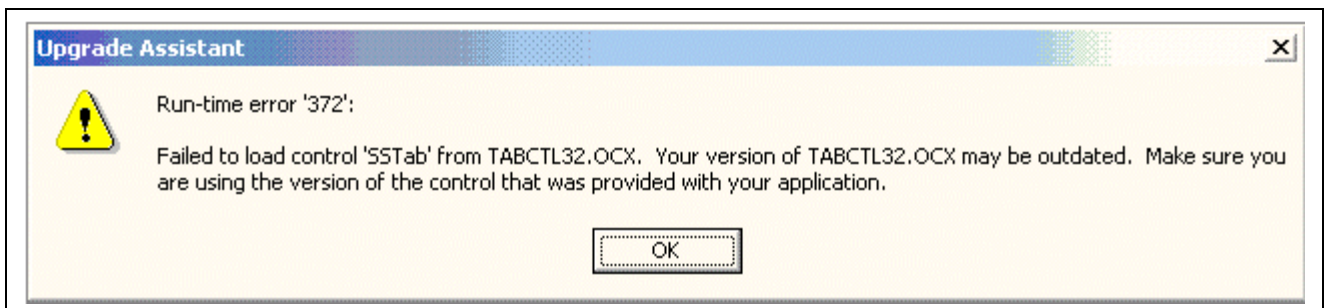
---

---

## Installing the Windows NT 4.0 Service Pack

You may receive the following error message when you attempt to run or install the PeopleSoft 8 Upgrade Assistant.

If you receive this error message, you must install the latest Windows NT 4.0 Service Pack on your machine prior to installing PeopleSoft Upgrade Assistant. You can download the latest service pack from the Microsoft website.



Error Message

---

**Note.** Install this service pack only if you are using Windows NT 4.0.

---

---

## Installing PeopleSoft Upgrade Assistant

In this task you install the PeopleSoft Upgrade Assistant.

To install the PeopleSoft Upgrade Assistant:

1. From the PS\_HOME/Setup/psua directory, run Setup.exe. The Welcome screen appears.
2. On the Welcome screen, select Next. The PeopleSoft Upgrade Assistant screen appears.
3. Accept the default Destination Folder or specify another Destination Folder.

4. Select Next. The Start Copying Files screen appears.
5. If you want to review or change any settings, click Back. If you are satisfied with your settings, click Next to begin copying files. PeopleSoft Upgrade Assistant copies files to the designated directory.
6. Click Finish to complete the Setup process.
7. You can open PeopleSoft Upgrade Assistant by selecting Start, Programs, PeopleSoft 8, Upgrade Assistant.

## CHAPTER 3

# Using the Upgrade Template

This chapter provides an overview of the upgrade template and discusses how to:

- Load the upgrade template.
- Set the documentation directory.
- Edit templates.
- Create templates.
- Merge templates.
- Modify step properties.

---

## Understanding the Upgrade Template

PeopleSoft Upgrade Assistant uses an upgrade template for each product line and release. The upgrade template contains the chapters, tasks, and steps for the upgrade and consists of SQL scripts, Data Mover scripts, SQR processes, Application Engine processes, and Application Designer procedures.

---

## Loading the Upgrade Template

PeopleSoft delivers upgrade templates for each product line and release; for example, if you are upgrading a Human Resources database from release 7.5 to release 8.4x, PeopleSoft provides a template and documentation specific to this upgrade. You can download the templates and documentation for your application from the upgrade documentation database on Customer Connection.

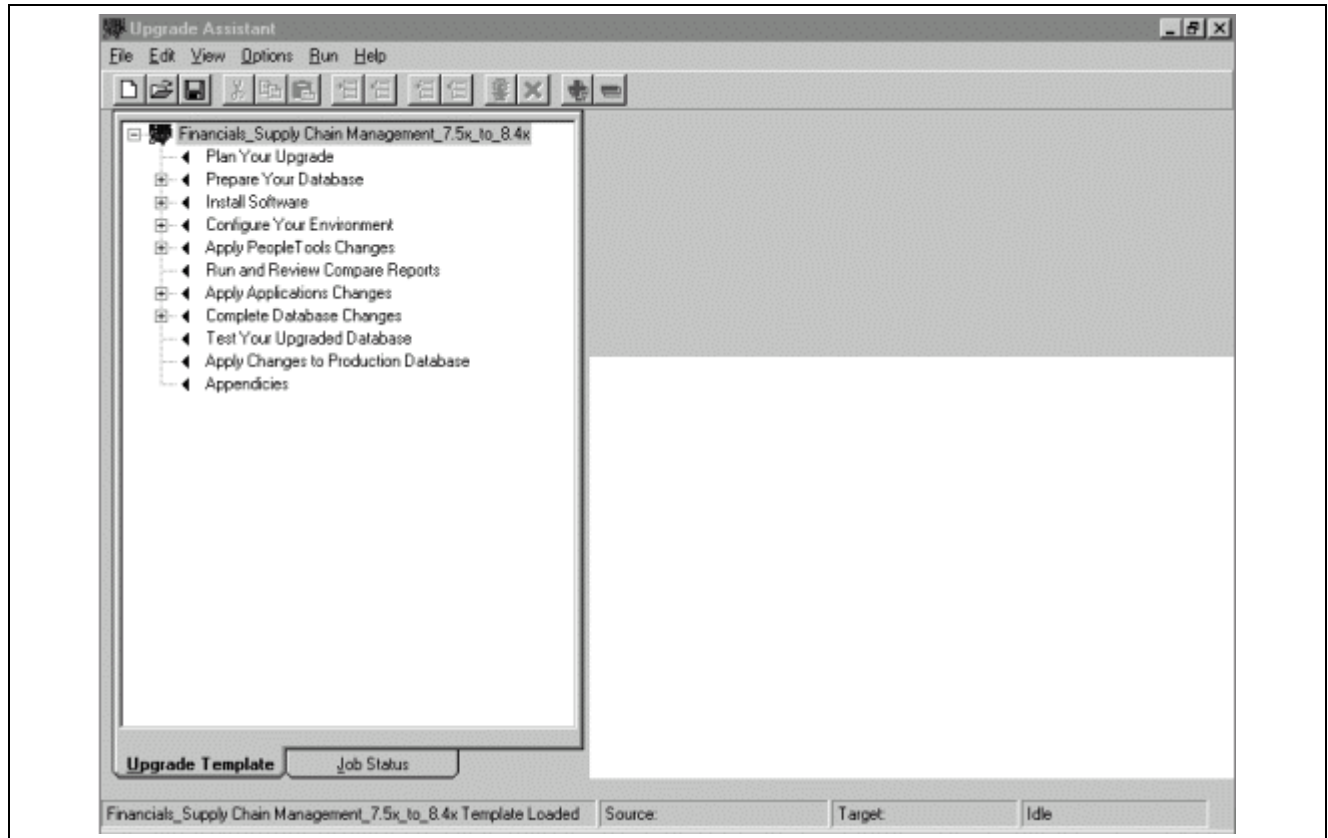
You must download the upgrade template and the upgrade documentation to your PeopleSoft Upgrade Assistant directory. After the upgrade template file and documentation have been download, detached, and unzipped, you can open the template in PeopleSoft Upgrade Assistant.

To load the upgrade template:

1. Start PeopleSoft Upgrade Assistant. A blank Upgrade Assistant template appears. Load the template for your selected product and path.
2. Select File, Open Upgrade Template. The Open Upgrade Template dialog box appears.
3. Select the directory in which you stored the upgrade template that you downloaded from Customer Connection.

4. Select the template for your product and path (for example, Financials and Supply Chain Management 7.5x to 8.4x).

PeopleSoft Upgrade Assistant loads the template for your upgrade product.



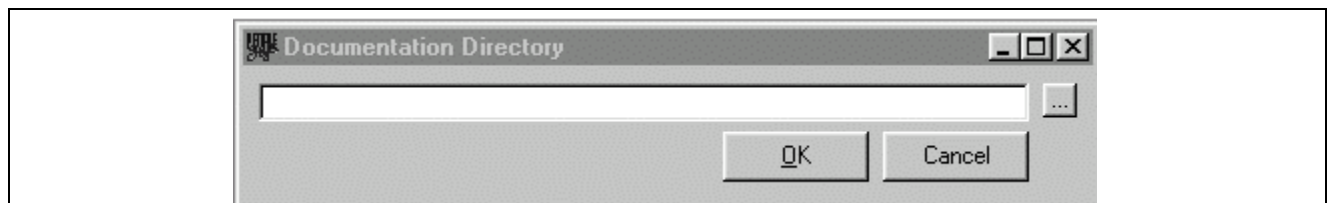
Upgrade template

## Setting the Documentation Directory

PeopleSoft Upgrade Assistant enables you to view the upgrade documentation relevant to the step you are viewing or performing.

To set the documentation directory:

1. Highlight a node in the template tree. The node is the product name at the top level of the template.
2. Select Edit, Set Documentation Directory. The Documentation Directory dialog box appears:

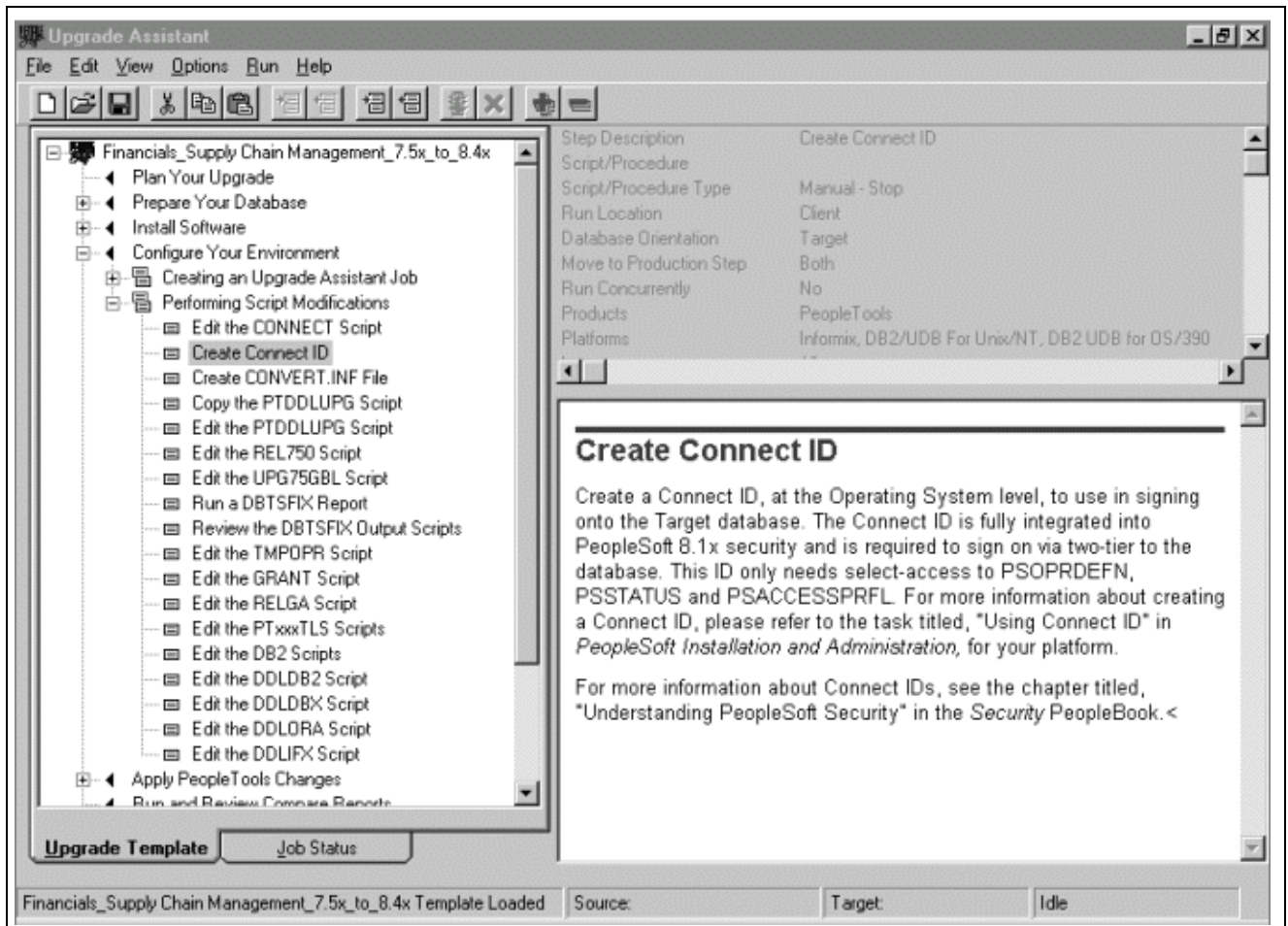


Documentation Directory dialog box

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

## 2. Click OK.

When you select a chapter, task, or step in the Upgrade Assistant template tree, PeopleSoft Upgrade Assistant displays the corresponding upgrade documentation in the Documentation Window.



Documentation window

After you have set the PeopleSoft-delivered upgrade template and documentation directory, you can create your upgrade job. The remainder of this chapter contains optional steps for editing templates, creating templates, and merging templates.

---

**Note.** The steps within the upgrade template contain default step properties. You do not need to modify these step properties unless you want to modify the step (for example, if you choose to run the step on a server).

---

### See Also

[Chapter 4, "Creating and Running the Upgrade Job," page 29](#)

## Editing Templates

You may want to add custom steps, modify existing steps, or delete existing steps from the PeopleSoft-delivered templates.

In this section, we discuss how to:

- Add steps.
- Edit steps.
- Delete chapters, tasks, or steps.
- Rename chapters, tasks, or steps.

## Adding Steps

PeopleSoft delivers upgrade templates with all of the steps included to perform the upgrade. While performing the upgrade, you may need to add custom steps (for example, you may add steps for dropping and adding indexes or running a backup of the target database).

Step Properties dialog box

To add a step:

1. Highlight the location where you want to add the step, then select **Insert Step**. The New Step dialog box appears.
2. Enter a unique name in the Step Description field.
3. Enter the step properties for the new step.

4. Click OK.
5. Save the template.

## See Also

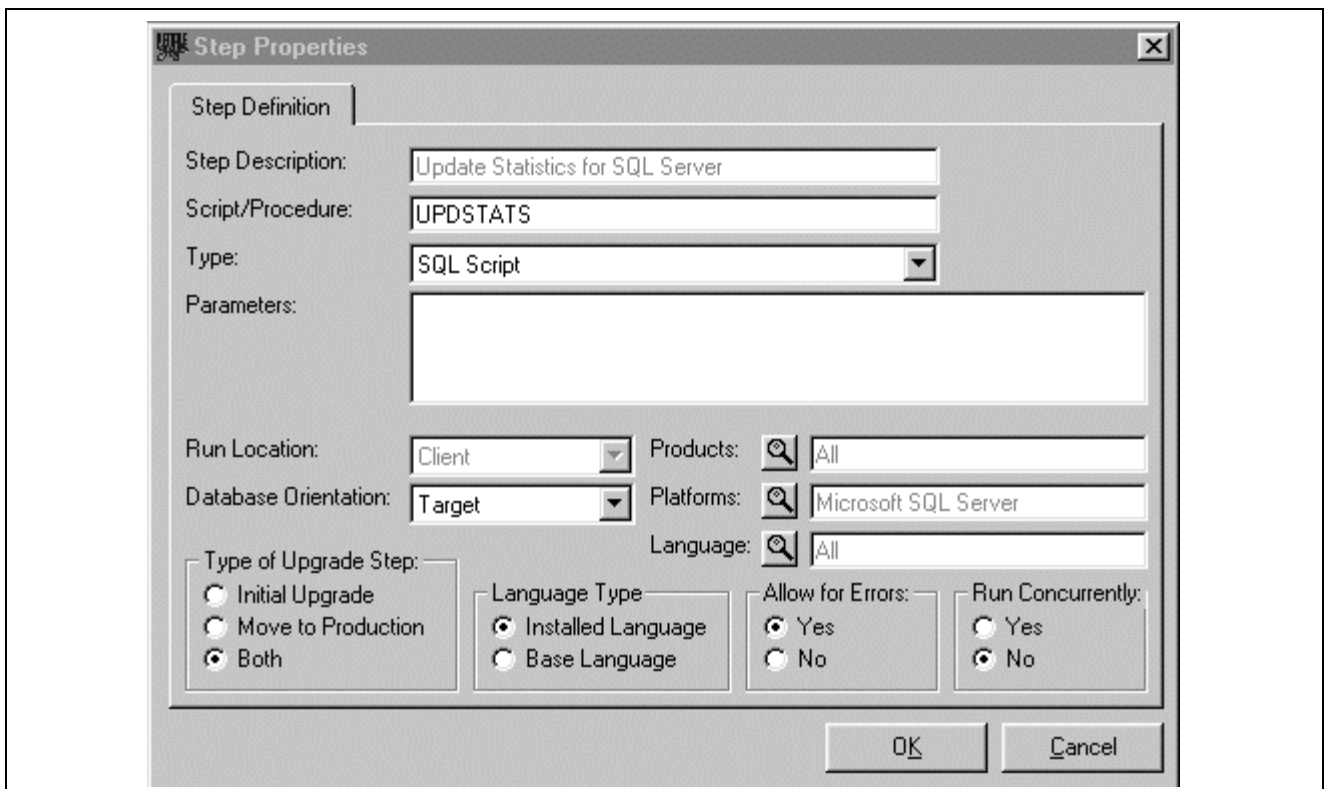
[Chapter 3, “Using the Upgrade Template,” Modifying Step Properties , page 22](#)

## Editing Steps

PeopleSoft delivers upgrade templates with default settings to perform upgrades. While performing the upgrade, you may need to modify the defaults (for example, changing Compare Flags, the Compare Release, or the PeopleCode report font or color options).

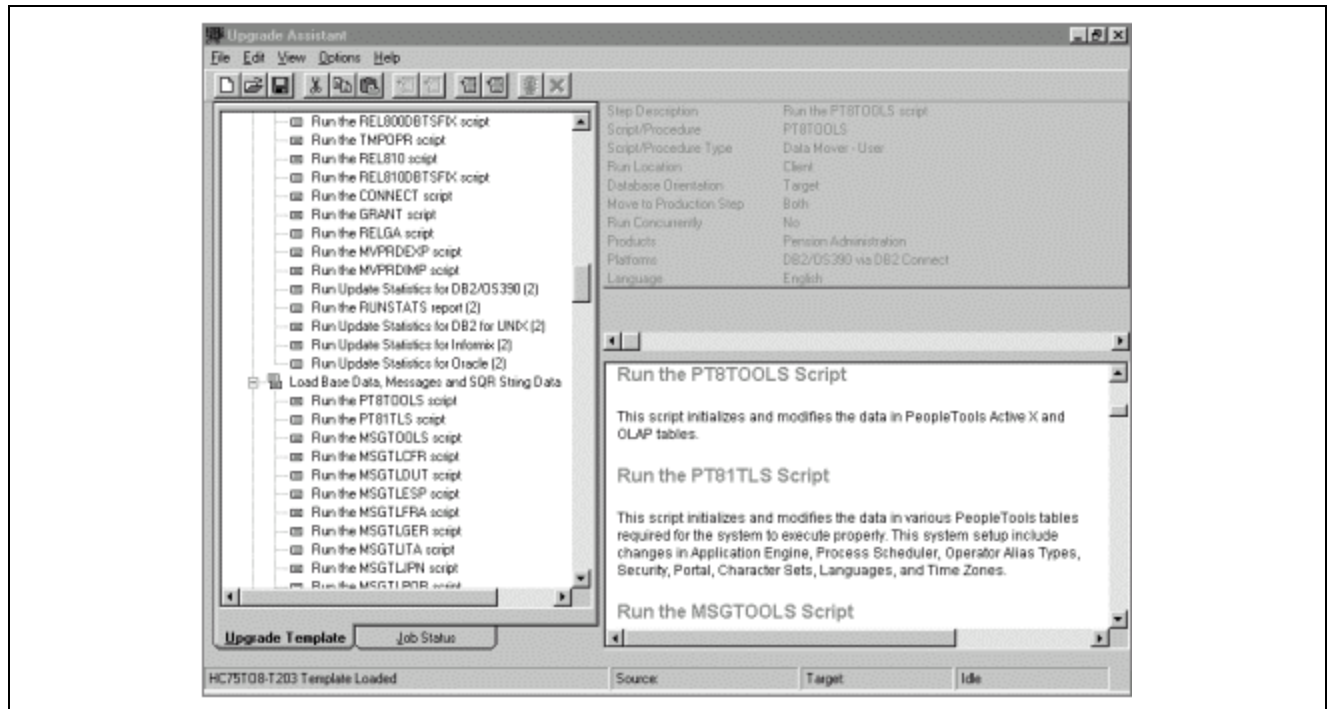
You can modify the default settings by changing the step properties. Setting these properties determines the conditions that apply when you run the upgrade process.

To modify the step properties, highlight the step for which you want to modify the step properties, then select Edit, Step Properties.



Step Properties dialog box

1. Verify that the step description corresponds to the step you selected.
2. Modify the select step properties.
3. Click OK on the Step Properties dialog box. The Upgrade Assistant dialog box reappears:



Step properties in Task Details section

The step properties you defined for the current step are displayed in the Task Details section of the dialog box.

Save the Template.

## See Also

[Chapter 3, “Using the Upgrade Template,” Modifying Step Properties](#), page 22

## Deleting Chapters, Tasks, or Steps

You may want to delete a chapter, task, or step from the upgrade template.

To delete a chapter, task, or step:

1. Access PeopleSoft Upgrade Assistant.
2. Select File, Open to select your template.
3. Highlight the chapter, task, or step you want to delete.

---

**Note.** If you delete a chapter, PeopleSoft Upgrade Assistant deletes all the tasks and steps within the chapter. If you delete a task, PeopleSoft Upgrade Assistant deletes all the steps within the task.

---

4. Select from the following:
  - a. If you want to delete a chapter, select Edit, Delete Chapter.
  - b. If you want to delete a task, select Edit, Delete Task.
  - c. If you want to delete a step, select Edit, Delete Step.
5. PeopleSoft Upgrade Assistant deletes the chapter, task, or step and updates the template.

6. Save the template.

## Renaming Chapters, Tasks, or Steps

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

---

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

---

To rename a chapter, task, or step:

1. Access PeopleSoft Upgrade Assistant. Make sure the Upgrade Template view is selected.
2. Select File, Open and select the template.
3. Highlight the chapter, task, or step you want to rename.
4. Select Edit, Rename.
5. Enter the new name.
6. Save the template.

---

## Creating Templates

You can create a custom template for your upgrade. When you create a custom template, you also insert chapters, tasks, and steps. In addition, you specify step properties.

In this section, we discuss how to:

- Create custom templates
- Create new chapters.
- Create new tasks.
- Create new steps.

### Creating Custom Templates

To create a custom template:

1. Access PeopleSoft Upgrade Assistant.
2. Select the Upgrade Template view.
3. Select File, New Upgrade Template.
4. Enter the name of the new template.
5. Click OK.

PeopleSoft Upgrade Assistant displays the name of your new template in the Template Tree. You can insert chapters, tasks, and steps, and assign step properties for the new template.

## Creating New Chapters

You can add a chapter to a new or existing upgrade template. A chapter is a section heading for a group of tasks.

To insert a chapter:

1. Highlight the location where you want to add the chapter. If this is the first chapter in the template, highlight the top node (template name) at the top of the Template Tree. If you are adding a task to an existing template, put your cursor where you want to insert the task.
2. On the Upgrade Assistant toolbar, select Edit, Insert Chapter.
3. Enter a unique name for your new chapter.

---

**Note.** Each chapter in the upgrade template must have a unique name.

---

4. Click OK.

## Creating New Tasks

You can add a task to a new or existing upgrade template. A task is a section heading for a group of steps.

To insert a task:

1. Highlight the location where you want to add the task. If you are adding a task to an existing template, put your cursor where you want to insert the task.
2. On the Upgrade Assistant toolbar, select Edit, Insert Task.
3. Enter a unique name for your new task.

---

**Note.** Each task in the upgrade template must have a unique name.

---

4. Click OK.

## Creating New Steps

You can add a step to a new or existing upgrade template. A step can be any process needed to perform the upgrade.

To insert steps:

1. Highlight the task where you want to add the new step.
2. From the Upgrade Assistant toolbar, select Edit, Insert Step.
3. Enter a unique name for your new step.

---

**Note.** Each step in the upgrade template must have a unique name.

---

4. Click OK.

PeopleSoft Upgrade Assistant displays the Step Properties dialog box.

5. You must define the step properties for the new step.
6. Continue creating steps until the template is complete.

7. To create an upgrade job for this template, select the Job Status view.

### See Also

[Chapter 3, “Using the Upgrade Template,” Modifying Step Properties , page 22](#)

[Chapter 4, “Creating and Running the Upgrade Job,” Creating the Upgrade Job, page 30](#)

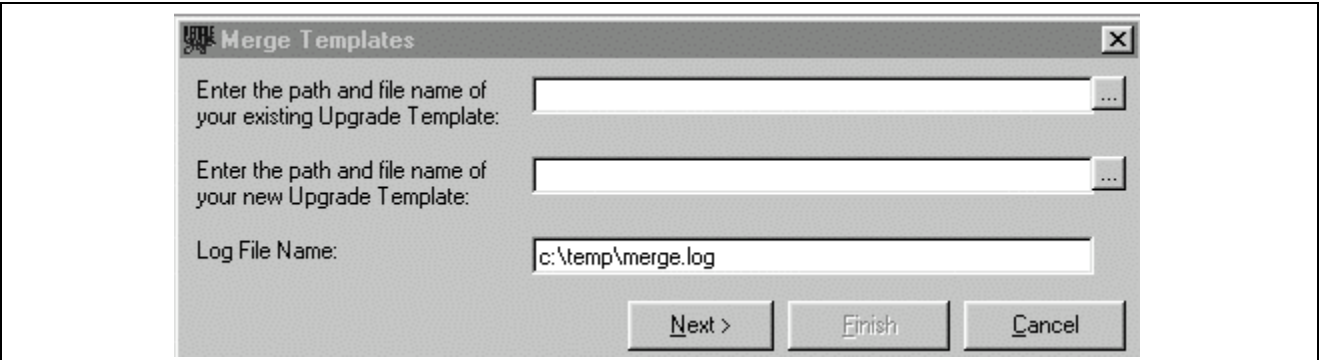
---

## Merging Templates

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

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

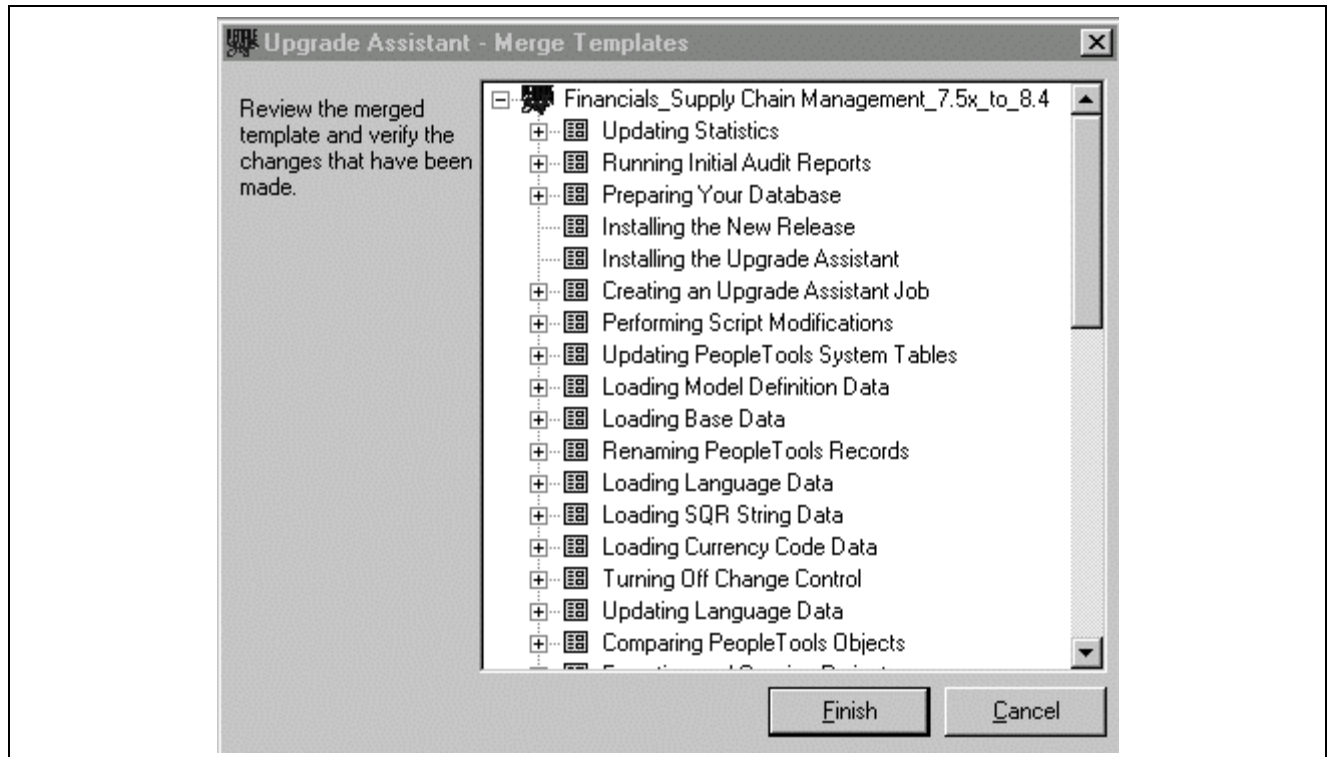
To merge templates select Options, Merge Templates.



Merge Templates dialog box

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

PeopleSoft Upgrade Assistant merges the two templates. It then displays the new merged template for you to review.

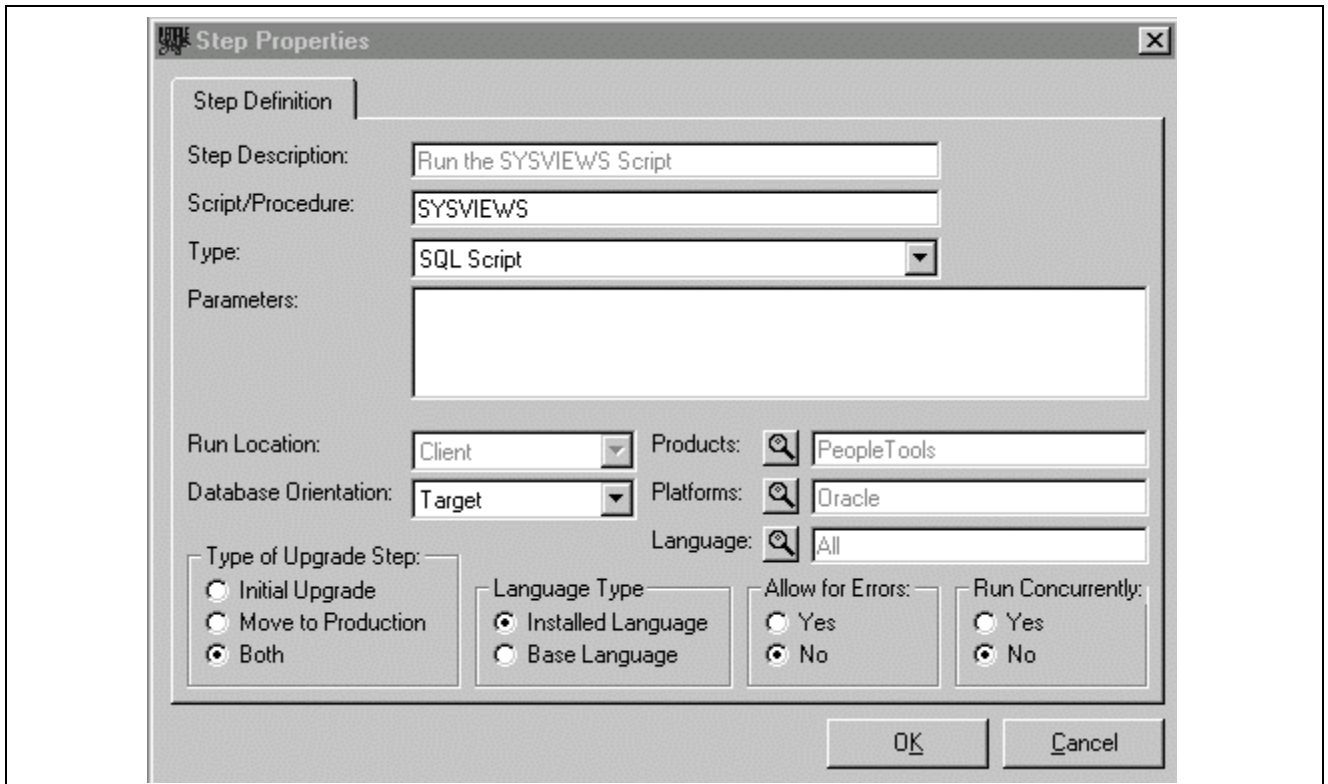


Upgrade Assistant - Merge Templates

## Modifying Step Properties

Step Properties are set by default in PeopleSoft-delivered templates. However, you may want to modify or edit step properties in your custom templates or for steps you add to PeopleSoft-delivered templates.

This section describes fields and options on the Step Properties dialog box. You can modify step properties for a step when adding or editing steps in the upgrade template.



Step Properties dialog box

**Step Description**

This field displays your current step.

**Script/Procedure**

Enter the script or procedure, if one is associated with the current step. This field is used for SQL scripts, Data Mover scripts, SQRs, and Application Engine processes.

**Type**

Select a Type of script or procedure. This selection defines the type for the script or procedure you selected. Types of scripts and procedures are:

Application Engine

Build Project

Compare and Report

Convert Application Engine

Convert FieldNames

Convert PeopleCode

Convert Workflow

Copy Database

Copy from File

Copy to File

Create Project

Custom Defined Process  
 Data Mover - Bootstrap  
 Data Mover - User  
 DBTSFIX  
 Load Base Data  
 Manual - Stop  
 SQL Command  
 SQL Script  
 SQR Report  
 Upgrade PeopleTools

---

**Note.** If you select *Create Project* from the Type drop-down list box, you must set a #Type parameter. When you select *Build Project* from the Type drop-down list box, a Build options button appears. You select options based on the instructions in the upgrade documentation for your product and path.

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

---

**Parameters** Enter additional Parameters you may need to run the step. For SQL commands, you enter the actual SQL command in this field.

The additional parameters are:

Parameter	Description
#Project=	Used primarily for functions that require a project name; for example, Build Project, Upgrade Compare, or Upgrade Copy.
#Directory=	Used when you need to run a script that is not located in the %PS_HOME%\scripts directory, for example, STOREPT. In this case, you could enter:  #Directory=#PT_PSHOMEsrc\cb1\base\
#P1= through #P5=	Used to pass parameters to SQR reports, for example, DBTSFIX.sqr. In this case, you would pass the necessary value, such as:  #P1=#OutputDirectory

Parameter	Description
#Rename=	Used primarily for the Convert FieldNames step type. It automatically copies the CONVERT-XXXX.INF file from the %PS_HOME%\scripts directory into the c:\temp\ and renames the file to CONVERT.INF.
#PTPS_HOME=	Used to specify the %PS_HOME% variable that is defined in the Database Configuration window.
#OutputDirectory=	Used to specify the Output Directory variable that is defined in the Database Configuration window.
#NT=	Used for DB2 Command Center, for Non-Terminated SQL Scripts.
#Type=	<p>Enables you to specify the type of record to insert into the project. Choose from the following record types:</p> <ul style="list-style-type: none"> <li>All Records</li> <li>Table</li> <li>View/Query View</li> <li>Derived</li> <li>SubRecord</li> <li>Stored Procedure</li> <li>Temporary Table</li> <li>Dynamic View</li> </ul>
#RCID=	Enables the user to override the Run Control ID used for Application Engine processes.

**Run Location**

Select *Client* or *Server* from the drop-down list box. This enables you to indicate whether to run the particular step, script, or procedure on the Client or a Process Scheduler Server.

If you select the server, PeopleSoft Upgrade Assistant checks the database configuration for the name of the Process Scheduler. You specify the Process Scheduler during the database configuration steps.

---

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

---

**Database Orientation**

Select *Source* or *Target* from the drop-down list box. This enables you to indicate whether to run the step, script, or procedure against the Source or Target database, as defined by the database configuration.

---

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

---

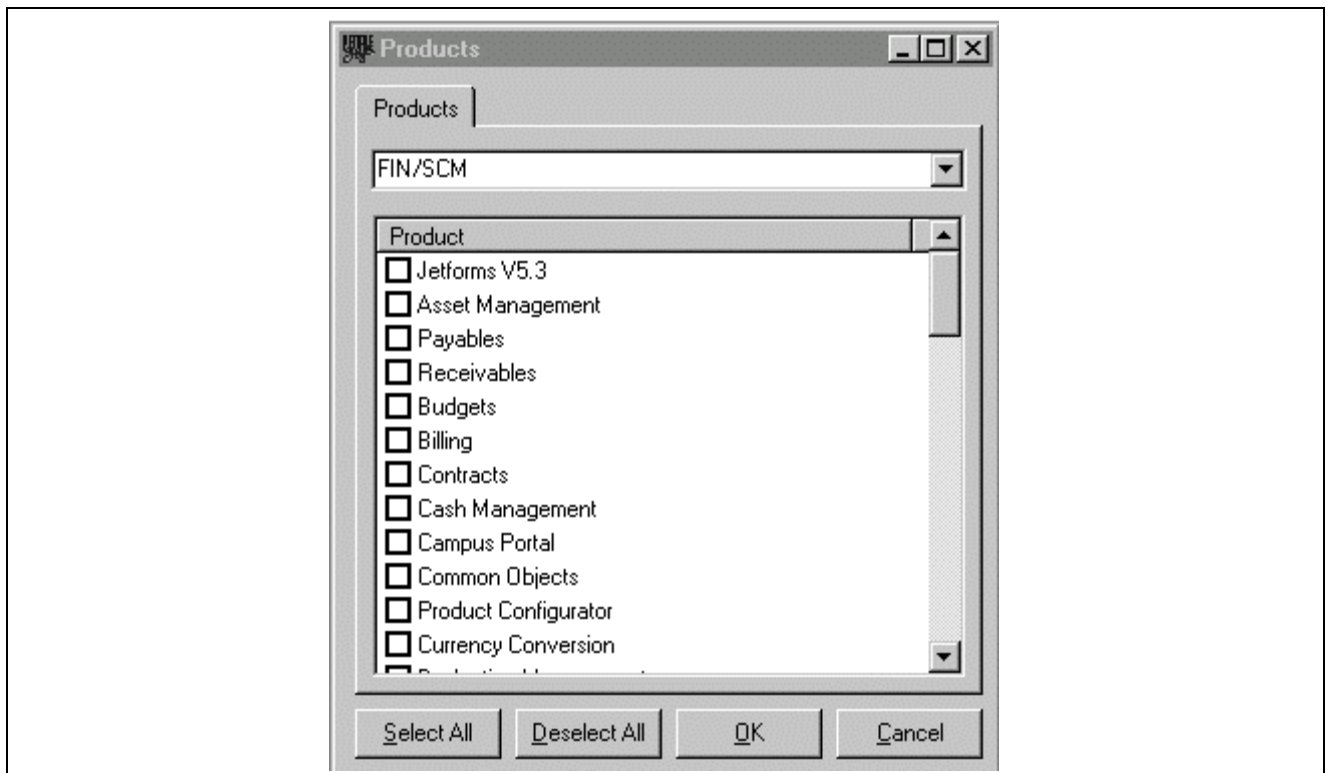
## Products

Click the Products icon and PeopleSoft Upgrade Assistant displays the Products dialog box. This dialog box enables you to select the product type from the drop-down list box (for example, FIN/SCM) and the product your step should be run against, from the checklist (for example Asset Management).

---

**Note.** This feature is used primarily for data conversion processes.

---

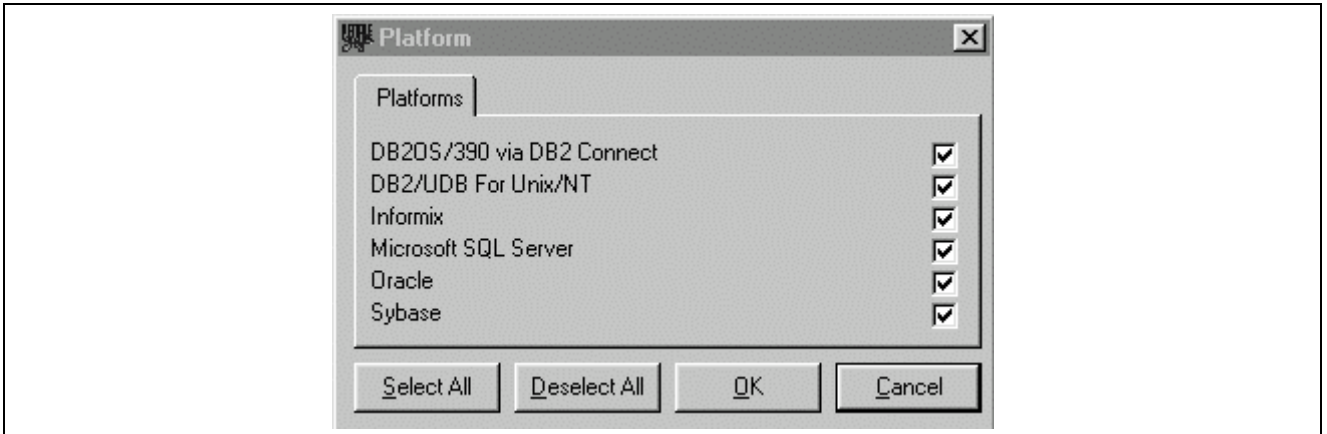


Products dialog box

After you select your products, Upgrade Assistant displays your selection on the Step Properties dialog box.

## Platforms

Click the Platforms icon on the Step Properties dialog box and PeopleSoft Upgrade Assistant enables you to select the platform you want to run against your upgrade step.

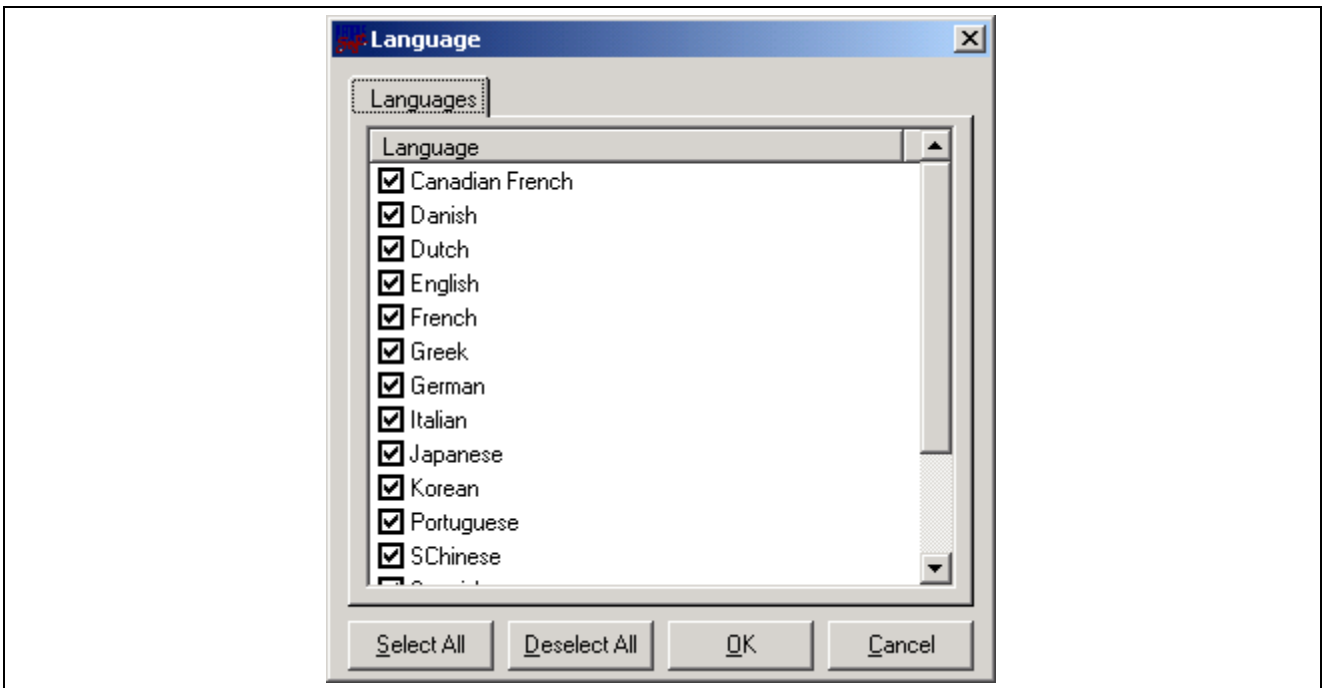


Platform dialog box

After you select your platforms, Upgrade Assistant displays your selection on the Step Properties dialog box.

**Language**

Click the Languages icon on the Step Properties dialog box to select the languages you have loaded in your database.



Language dialog box

After you select your Languages, Upgrade Assistant displays your selection on the Step Properties dialog box.

In the Type of Upgrade Step group box, select one of the following options:

**Initial Upgrade, Move to Production, or Both**

Indicate whether to use the step, script, or procedure in the Initial Upgrade, the Move to Production, or both parts of the upgrade process. PeopleSoft Upgrade Assistant automatically filters steps by platform, product, and language. The default selection is Both.

In the Language Type group box, select one of the following options:

<b>Installed Language</b>	Upgrade Assistant runs the step against the language installed in your database. If you select this option, Upgrade Assistant filters your upgrade for the current step based on the language you selected on the Database Configuration, Language tab. In most cases, you select this option.
<b>Base Language</b>	PeopleSoft Upgrade Assistant runs the step against the base language. This option is used primarily if you are running a step that involves currency scripts. If you select this option, you must also select your base language in the Target Base Language drop-down list box on the Database Configuration dialog box. PeopleSoft Upgrade Assistant filters your upgrade for the selected step, based on that selection.
<b>Language</b>	When you click the Languages icon on the Step Properties dialog box, PeopleSoft Upgrade Assistant enables you to select the languages you have loaded in your database.

In the Allow for Errors group box, select one of the following options:

<b>Yes</b>	Select to allow for errors in the step. If you set this option, PeopleSoft Upgrade Assistant continues the run process if it encounters an error.
<b>No</b>	Select to set for no errors in the step. If you select this option, PeopleSoft Upgrade Assistant stops the upgrade process if it encounters an error. You can configure PeopleSoft Upgrade Assistant to notify you, by email, if an error occurs.

---

**Note.** The default setting is *No*.

---

PeopleSoft Upgrade Assistant can run certain upgrade steps concurrently; for example, you can run several Application Engine, SQR, or SQL scripts simultaneously.

In the Run Concurrently group box, select one of the following options:

<b>Yes</b>	Select to run the step concurrently. If you select this option for two or more steps, PeopleSoft Upgrade Assistant starts those processes concurrently, until it reads a step that has been set to <i>No</i> .
<b>No</b>	Select to run the step individually.

---

**Note.** The default setting is *No*.

---



---

**Note.** When you have completed defining the properties for a step and click OK on the Step Properties dialog box, the template redisplay with the modified step properties in the Task Details area of the template.

---

## See Also

*PeopleTools PeopleBook: PeopleSoft Application Designer PeopleBook, “Building SQL Tables and Views”*  
 Chapter 6, “Configuring and Editing Options,” Specifying Email Settings, page 36

## CHAPTER 4

# Creating and Running the Upgrade Job

This chapter provides an overview of creating and running the upgrade job and discusses how to:

- Create the job.
- Review the job status.
- Run the job.
- Edit job properties.
- View files.
- Generate filtered upgrade documentation.
- Perform the PeopleTools upgrade.
- Restart the PeopleTools upgrade.

---

## Creating the Job

After you have opened the upgrade template, you create and run the upgrade job. Creating the Upgrade Job provides the upgrade procedures for the specified environment. This is where you run automated upgrade steps and monitor the progress of the upgrade.

---

**Note.** You can create multiple upgrade jobs for each upgrade template.

---

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

In this section, we discuss how to:

- Create the job.
- Configure the database.
- Specify the directories.
- Select the products.
- Set the language preference.
- Set the import and export preferences.
- Set general preferences.
- Complete the configuration.

## Creating the Upgrade Job

In this step, you create and name the upgrade job.

To create the upgrade job:

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

Database Configuration dialog box

You use this dialog box to configure your database properties.

The Database Configuration page has been modified to allow for source and target user IDs and passwords up to 30 characters in length.

---

**Note.** The length for database server names has been increased from 20 characters to 256 characters.

---

## CHAPTER 5

# Running Application Engine Processes on the Server

This chapter provides an overview of running PeopleSoft Application Engine processes on the server and discusses how to:

- Configure PeopleSoft Process Scheduler and Application server.
- Configure the portal.
- Build the PROCESSREQUEST Component Interface.
- Edit Maintain Security.
- Set properties.

---

## Configuring Process Scheduler and Application Server

PeopleSoft Upgrade Assistant uses the PROCESSREQUEST Component Interface object to submit jobs to run on the Process Scheduler Server. You must configure your environment for PeopleSoft Upgrade Assistant to submit processes.

You must first configure and run a Process Scheduler and Application Server against the Target database.

### See Also

For details about configuring your Process Scheduler and Application Server, see PeopleTools PeopleBook.

---

## Configuring the Portal

You must configure the Portal to update User Security.

### See Also

*PeopleTools 8.42 PeopleBook: PeopleTools 8.42 Installation for Your Database Platform, "Setting Up the PeopleSoft Internet Architecture"*

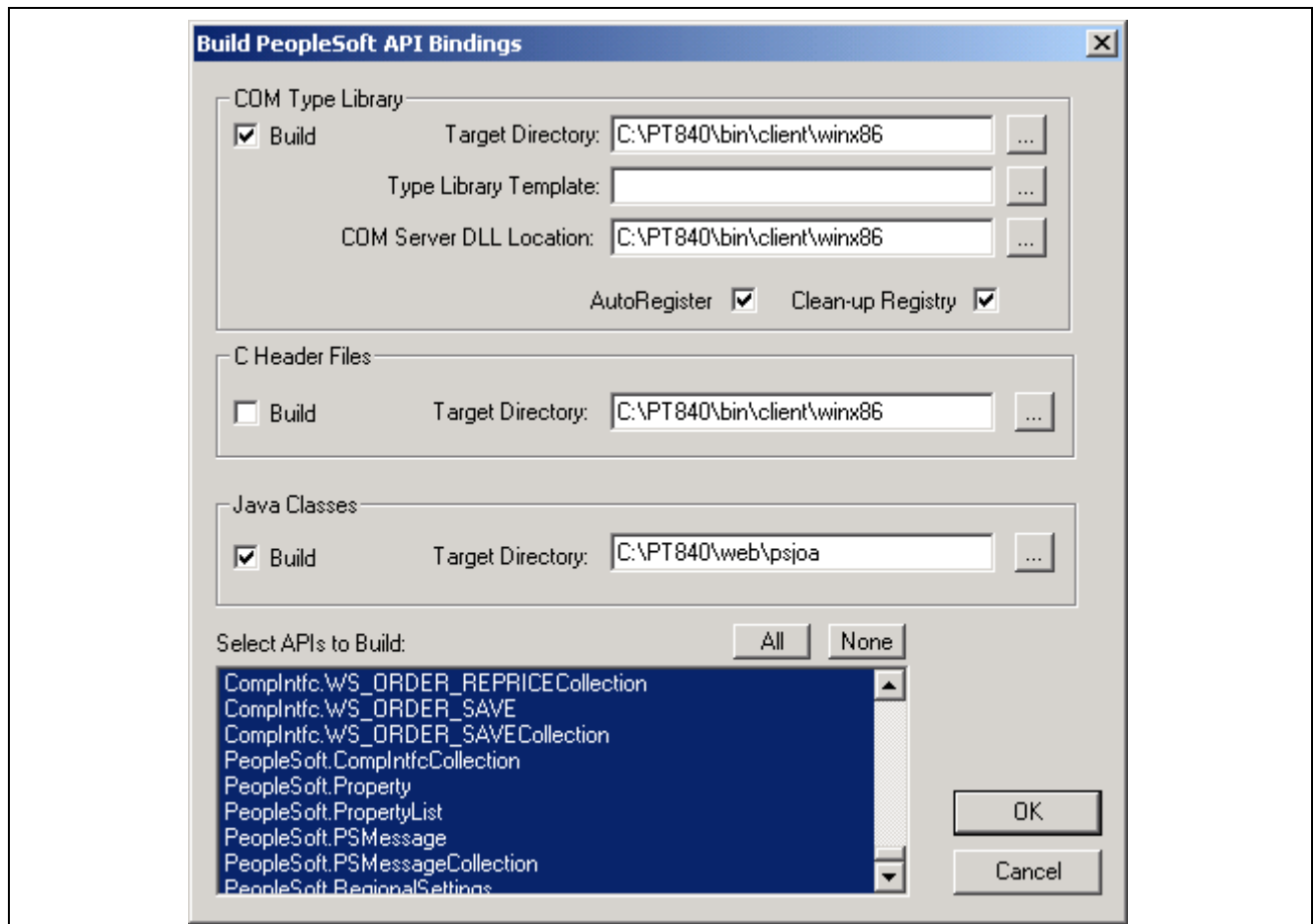
## Building the PROCESSREQUEST Component Interface

This section describes how to configure the PROCESSREQUEST Component Interface.

To configure the PROCESSREQUEST Component Interface:

1. Access PeopleSoft Application Designer.
2. Open Object dialog box
3. Open the PROCESSREQUEST Component Interface object shown:
4. Navigate to Build, PeopleSoft APIs.
5. Point the Target Directory and COM Server DLL Location to the <PS\_HOME>\bin\client\winx86 directory.
6. Click OK.

The following dialog box appears:



Build PeopleSoft API Bindings dialog box

The system builds the PROCESSREQUEST Component Interface object to the <PS\_HOME>\bin\client\winx86 directory.

### See Also

For information about configuration settings that must be set, see *PeopleTools 8.42 PeopleBook: PeopleSoft Component Interfaces, Programming Component Interfaces in COM.*

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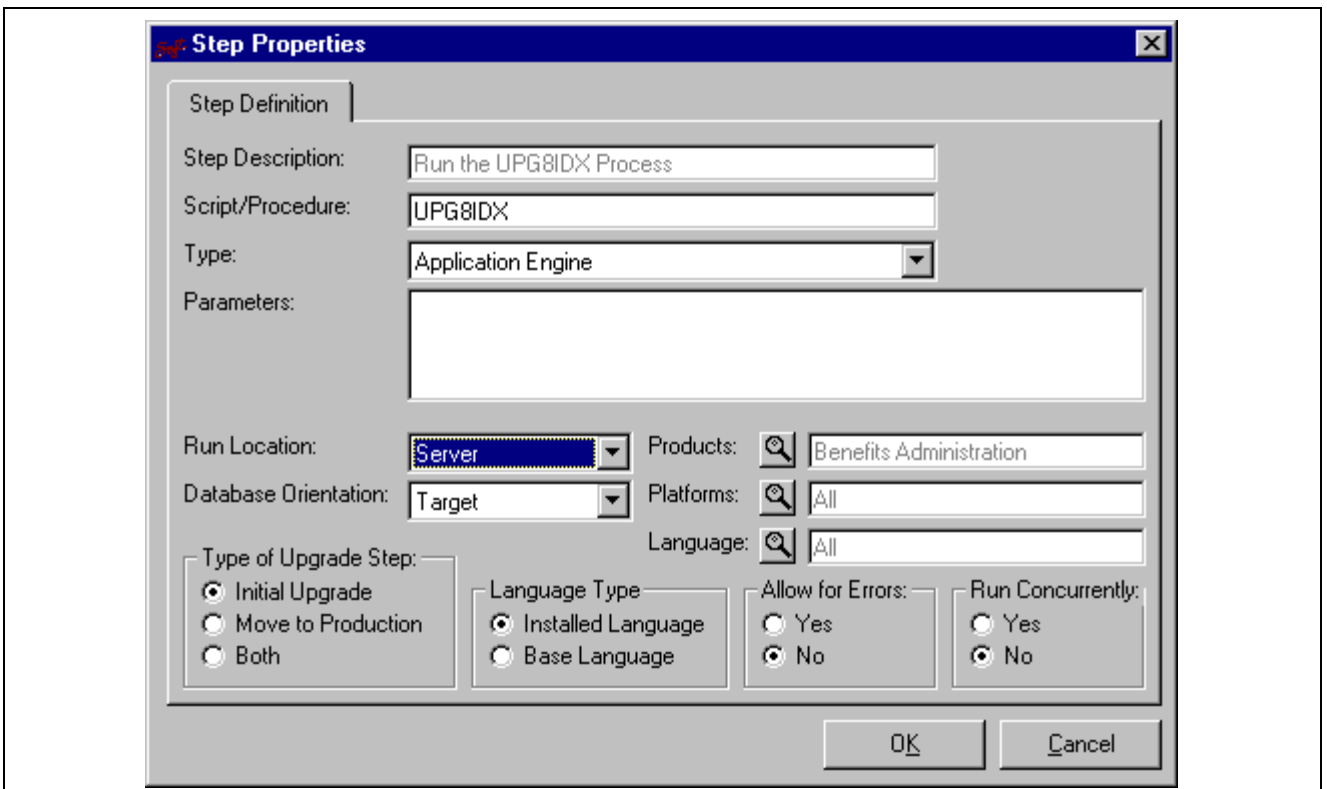
## Editing Maintain Security

You must edit Maintain Security to run the PROCESSREQUEST object.

---

## Setting Properties

Make sure that the Run Location of the Application Engine process is set to run on the *Server*, as shown:



Step Properties dialog box

PeopleSoft Upgrade Assistant can then run Application Engine processes against a Process Scheduler located on your server.



## CHAPTER 6

# Configuring and Editing Options

This chapter provides an overview of configuring and editing options for your database and discusses how to:

- Edit your database configuration.
- Specify settings.

---

## Editing Your Database Configuration

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

To edit your database configuration:

1. Access PeopleSoft Upgrade Assistant.
2. Select the Job Status view.
3. Select File, Open Upgrade Job and select your upgrade job.
4. Select Options, Database Configuration.

PeopleSoft Upgrade Assistant displays the Database Configuration dialog box.

5. Modify your selected options.
6. When you are finished modifying your database configuration options, click OK.

The Upgrade Template reappears in Job Status view.

7. Save your template.

### See Also

[Chapter 4, “Creating and Running the Upgrade Job.” Creating the Upgrade Job, page 30](#)

---

## Specifying Settings

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

In this section, we discuss how to:

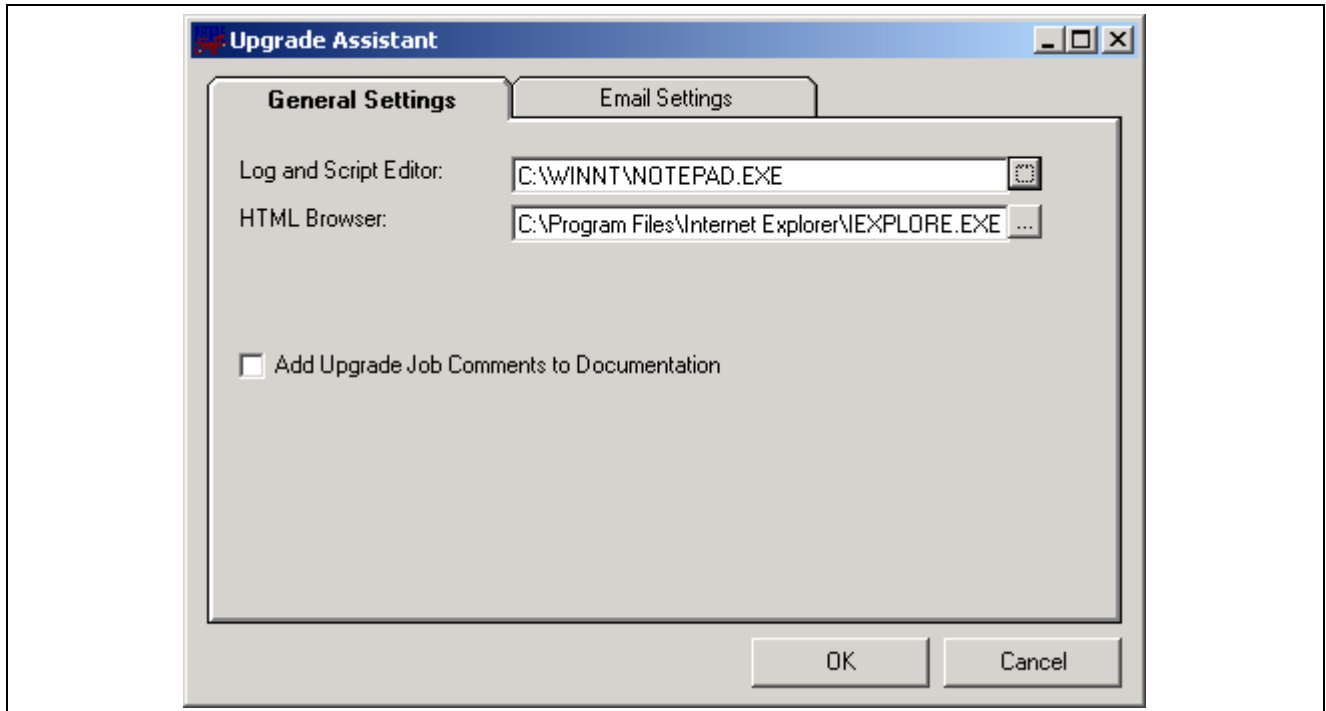
- Specify general settings.

- Specify email settings.

## Specifying General Settings

PeopleSoft Upgrade Assistant uses Notepad as the default editor for displaying logs and scripts. However, if you prefer, you can specify a different editor. You will also specify an HTML Browser to use for generating filtered upgrade documentation.

To specify general settings, access PeopleSoft Upgrade Assistant, Options, Upgrade Assistant, General Settings tab.



Upgrade Assistant - General Settings tab

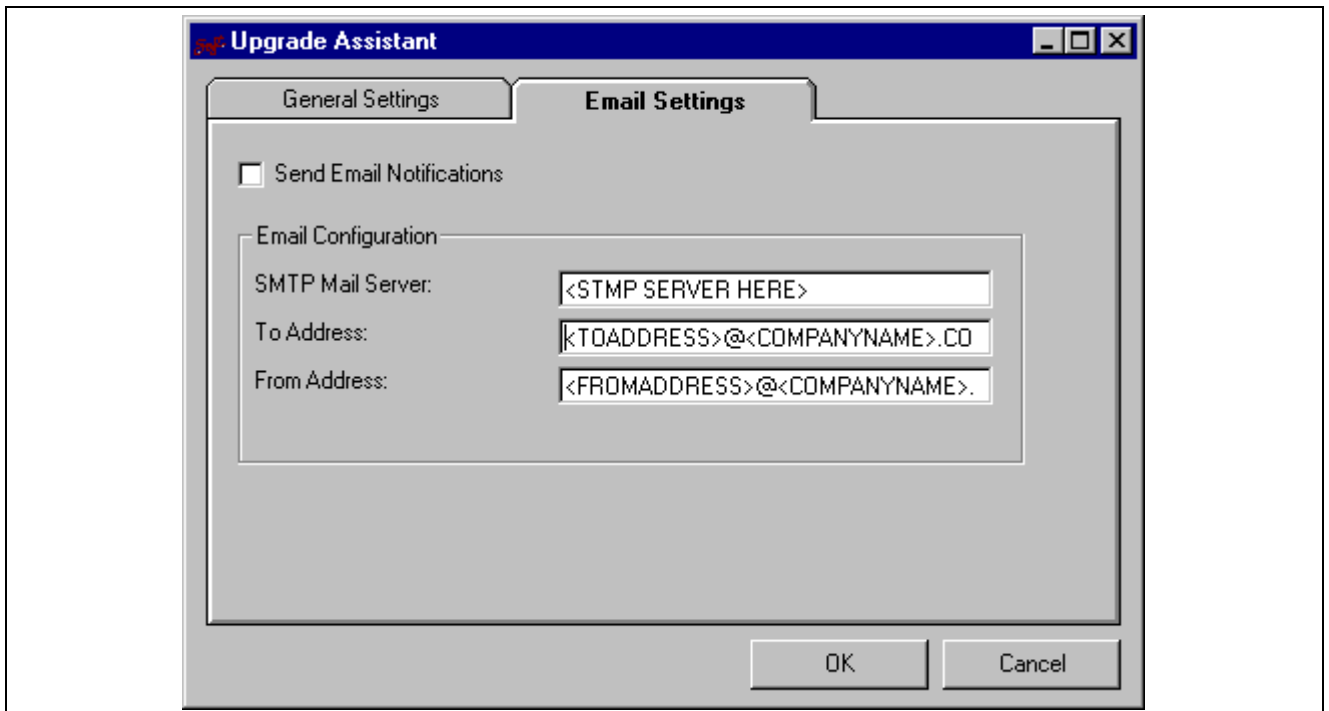
1. In the Log and Script Editor field, specify (or browse to) the executable for the editor, including the path name.
2. In the HTML Browser field, specify (or browse to) the executable for the HTML browser, including the path name (for example, C:\Program Files\Internet Explorer\IEXPLORE.EXE).
3. The Add Upgrade Job Comments to Documentation enables you to add custom notes or documentation to documentation that is viewed through the Upgrade Assistant or the filtered documentation produced by the Upgrade Assistant.
4. Click OK.

## Specifying Email Settings

On the Task Properties dialog box, you specified whether to allow for errors during the upgrade process. If you selected *No* to the Allow for Errors option, you may want to configure PeopleSoft Upgrade Assistant to notify you, by email, if it encounters an error during the upgrade process. When you select this option, PeopleSoft Upgrade Assistant sets this notification process. In addition, PeopleSoft Upgrade Assistant sends you a completion message when it encounters a *Stop* in the upgrade process.

PeopleSoft Upgrade Assistant uses SMTP Mail Servers to send the error (failure) notifications and completion messages.

To specify email settings, access PeopleSoft Upgrade Assistant, Options, Upgrade Assistant, Email Settings tab.



Upgrade Assistant - Email Settings tab

1. Select the Send Email Notifications check box if you want PeopleSoft Upgrade Assistant to notify you of any errors encountered during the upgrade process.
2. In the Email Configuration group box, enter the following information:
  - a. SMTP Mail Server
  - b. To Address
  - c. From Address
3. Click OK.



# CHAPTER 7

## Understanding Process Types

This chapter describes the process types available in PeopleSoft Upgrade Assistant.

---

### Upgrade Processes

In the upgrade process, you assign a process type for each step in your upgrade. This provides PeopleSoft Upgrade Assistant with information necessary to complete the step. The following table describes each process type contained in PeopleSoft Upgrade Assistant.

Process Type	Definition
Application Engine	This selection runs Application Engine processes in the Script/Procedure value under Step Properties. You can run your Application Engine process on the client, the server, or in parallel. You may need to adjust these to reduce the amount of time needed for the actual Move to Production part of the upgrade.
Build Project	This selection builds the project specified in the Task Properties parameter as #Project= (for example, #Project=ALLTABS). The project is built through the PeopleTools command line.
Custom Defined Process	This selection enables you to include custom added processes, such as Batch files, that you can run through the Upgrade Assistant. You need to start this process with cmd / c for the process to run. For example:  cmd / c c:\backup.bat
Convert Application Engine	This selection converts Application Engine processes to the PeopleSoft 8.42 format (GUI processes).
Convert Fieldnames	This selection converts FieldNames to the PeopleTools PeopleSoft 8.42 format (GUI processes).
Convert PeopleCode	This selection converts PeopleCode programs to support the newly-supported Unicode format (GUI processes).
Convert Workflow	This type converts Workflow objects to the PeopleTools PeopleSoft 8.42 format.

Process Type	Definition
Create Project	This type enables you to select the type of records to insert into a project.
Data Mover—User	This type runs Data Mover scripts as the User ID specified in the Database Configuration (non-bootstrap mode).
Data Mover—Bootstrap	This type runs Data Mover scripts as the Access ID specified in the Database Configuration (bootstrap mode).
DBTSFIX	PeopleSoft Upgrade Assistant determines your source and target releases and decides which DBTSFIX scripts need to be run for your Upgrade.
Load Base Data	PeopleSoft Upgrade Assistant determines your source and target releases and decides which Base Data scripts need to be run for your Upgrade.
Manual—Stop	This type is defined as a task you must run manually. PeopleSoft Upgrade Assistant automatically sets the run status to <i>Stop</i> . After you have manually completed the step, you must change the Job Status to <i>Complete</i> .
SQL Command	This type runs the SQL command defined in the Parameters value under the Step Properties. PeopleSoft Upgrade Assistant runs the command using the SQL Query tool specified in the Database Configuration dialog box. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error.
SQR Report	This type runs SQRs using the pssqr command line.
SQL Script	This type runs the SQL script defined in the Script/Procedure value under the Step Properties. PeopleSoft Upgrade Assistant runs the script using the SQL Query tools specified on the Database Configuration. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error.
Compare and Report	This type runs the Upgrade Compare Process using the project specified in the Step Properties parameter as #Project= (for example, #Project=ALLTABS). You can modify the Upgrade Compare Options such as the Report Filters through PeopleSoft Upgrade Assistant. PeopleSoft Upgrade Assistant uses the option, from the Upgrade Compare when running the process (GUI process).
Copy Database	This type runs the Upgrade Copy Process using the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS). You can modify the Upgrade Copy options such as Language options or Objects to Copy through PeopleSoft Upgrade Assistant. PeopleSoft Upgrade Assistant uses the options, from the Upgrade Copy, when running the process (GUI process).
Copy To File	This type copies a project to a file. This is used in conjunction with the Copy From File option. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).

<b>Process Type</b>	<b>Definition</b>
Copy From File	This type copies a project from a file. This is used in conjunction with the Copy To File. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).
Upgrade PeopleTools	PeopleSoft Upgrade Assistant determines your source and target releases and decides which release scripts and other miscellaneous scripts need to be run to upgrade your PeopleTools tables to the latest release level.



# CHAPTER 8

## Troubleshooting

This chapter lists error messages you may see during the upgrade process and the recommended action for correcting the errors.

This chapter includes the following:

- PeopleTools Upgrade
- Running Application Engine Processes on the Server
- Running Application Engine Processes on the Client
- Other

---

### PeopleTools Upgrade

This section contains error messages and the recommended actions.

Message	Recommended Action
Unable to login into the Target Database	Check the following items:  Confirm that the Target Database Configuration information is correct.  Confirm that the Upgrade Assistant Staging and Output Directories (found under the Database Configuration, Directories tab) does not contain spaces in the directory name as in the following examples.  Not Valid: C:\Program Files\PeopleSoft\Upgrade Assistant\staging\  Valid: C:\PT840\staging\  Check the <UA Output Directory>\TOOLSREL.log file for error messages.

Message	Recommended Action
<p>Unable to login into the Source Database</p>	<p>If your Upgrade Template contains the task titled <i>Organize Your PeopleTools Upgrade</i> review the following:</p> <p>The Upgrade Assistant does not use the Source Database Information. Instead it checks the &lt;PS_HOME&gt;\projects\PPLTLS84CUR\PPLTLS84CUR.ini file for the latest release. If the “RELEASE=” value is less then PeopleTools 8.14.000, you will need to install the most recent PeopleTools release.</p> <p>If your Upgrade Template <i>does not</i> contain the task titled “Organize Your PeopleTools Upgrade”, review the following:</p> <ul style="list-style-type: none"> <li>• Confirm that the Source Database Configuration information is correct.</li> <li>• Check the &lt;UA Output Directory&gt;\TOOLSREL.log file for error messages.</li> </ul>
<p>Target and Source Databases at the same release. No scripts to execute.</p>	<p>The Upgrade Assistant ran the TOOLSREL.sql query against both the Source and Target databases and determined that both are at the same release. Once the Source and Target releases have been determined, the database configuration is stamped with the releases. Also, once the database configuration is stamped, the database configuration cannot be changed. The only way to continue is to create a new job.</p>
<p>Run-Time error '13' Type Mismatch</p>	<p>If your Upgrade Template contains the task titled <i>Organize Your PeopleTools Upgrade</i>, then the Upgrade Assistant does not use the Source Database Information. Instead it checks the &lt;PS_HOME&gt;\projects\PPLTLS84CUR\PPLTLS84CUR.ini file for the latest release. If the “RELEASE=” value is less then PeopleTools 8.14.000, you will need to install the most recent PeopleTools release.</p>
<p>Run-Time error '53' File not found: PSAPI.DLL</p>	<p>Perform a Find/Search on the local drive (C: drive) for PSAPI.DLL. PSAPI.DLL is part of the NT operating system. If any other version of PSAPI.DLL is found, in addition to the version located in the C:\WINNT\SYSTEM32 directory, rename it and try again.</p>

## Running Application Engine Processes on the Server

The following table shows Application Engine messages

Message	Recommended Action
Process fails but there is no log file	Confirm that the Server Output directory in the Upgrade Assistant Database configuration is correct. <b>Note.</b> The path should end with a backslash.
Error number –16	Check that the ProcessRequest Component Interface has been properly configured and built. <i>See Chapter 5, "Running Application Engine Processes on the Server"</i>
Error number –17	Check to make sure that the Application Server and Process Scheduler are running and are properly configured. Check to make sure that the JSL (Jolt Listener Port) is set correctly. <b>Note.</b> JSL Port and WSL Port are not the same.
Error number –18	Upgrade Assistant failed to retrieve the PROCESSREQUEST component interface. Use the Component Interface Tester found in Application Designer to test. See PeopleTools Component Interface PeopleBook.
Error number –19	Upgrade Assistant failed to set the PROCESSREQUEST Component Interface properties. Use the Component Interface Tester found in the Application Designer to test. See PeopleTools Component Interface PeopleBook.
Error number –20	Upgrade Assistant failed to save the PROCESSREQUEST Component Interface properties. Use the Component Interface Tester found in the Application Designer to test. For more information, see <i>PeopleSoft Component Interfaces</i> .

## Running Application Engine Processes on the Client

This section contains error messages and the recommended actions.

Message	Recommended Action
Run the Upgrade Assistant "Run" function but nothing happens.	Confirm that "C:\WINNT\SYSTEM32\PSAPI.DLL" exists.

## Other

This section contains other miscellaneous messages.

<b>Message</b>	<b>Recommended Action</b>
Cannot locate log file: c:\temp\UA\75to840out\DBTSFIX_DBTSFIX800	Confirm that SQR Parameters were set correctly.

# Glossary of PeopleSoft Terms

<b>absence entitlement</b>	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>account</b>	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
<b>accounting class</b>	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
<b>accounting date</b>	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
<b>accounting entry</b>	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
<b>action reason</b>	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
<b>activity</b>	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
<b>allocation rule</b>	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
<b>alternate account</b>	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
<b>application agent</b>	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attachment</b>	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
<b>background process</b>	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
<b>budget period</b>	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
<b>business event</b>	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
<b>catalog item</b>	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
<b>category</b>	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
<b>ChartField</b>	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>child</b>	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
<b>Class ChartField</b>	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
<b>clone</b>	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
<b>collection</b>	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
<b>compensation object</b>	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>configuration parameter catalog</b>	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
<b>configuration plan</b>	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
<b>content reference</b>	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
<b>context</b>	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
<b>corporate account</b>	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
<b>cost profile</b>	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.

<b>data acquisition</b>	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
<b>data elements</b>	Data elements, at their simplest level, define a subset of data and the rules by which to group them.  For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
<b>data row</b>	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
<b>data validation</b>	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
<b>DAT file</b>	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
<b>delivery method</b>	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
<b>delivery method type</b>	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
<b>distribution</b>	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
<b>double byte character</b>	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
<b>dynamic tree</b>	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
<b>edit table</b>	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
<b>effective date</b>	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
<b>EIM job</b>	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>equipment</b>	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

<b>event</b>	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
<b>event propagation process</b>	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
<b>external system</b>	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
<b>fact</b>	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
<b>filter</b>	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
<b>generic process type</b>	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
<b>group</b>	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
<b>homepage</b>	Users can personalize the homepage, or the page that first appears when they access the portal.
<b>incentive object</b>	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
<b>incentive rule</b>	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
<b>key</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>learner group</b>	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
<b>learning activity</b>	See <i>activity</i> .
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
<b>learning plan</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

<b>level</b>	A section of a tree that organizes groups of nodes.
<b>library section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
<b>linked section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
<b>linked variable</b>	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
<b>load</b>	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
<b>local functionality</b>	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
<b>location</b>	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
<b>market template</b>	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
<b>material</b>	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
<b>message definition</b>	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
<b>meta-SQL</b>	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
<b>metastring</b>	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>objective</b>	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
<b>override</b>	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
<b>pagelet</b>	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

<b>parent node</b>	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects.  See also <i>participant object</i> .
<b>payout</b>	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
<b>PeopleCode</b>	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
<b>performance measurement</b>	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
<b>period context</b>	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
<b>per seat cost</b>	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
<b>plan</b>	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
<b>plan context</b>	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
<b>plan section</b>	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
<b>plan template</b>	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
<b>portal registry</b>	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
<b>private view</b>	A user-defined view that is available only to the user who created it.
<b>process</b>	See <i>Batch Processes</i> .
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
<b>process job</b>	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
<b>process request</b>	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
<b>process run control</b>	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
<b>product category</b>	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>record definition</b>	A logical grouping of data elements.
<b>record field</b>	A field within a record definition.
<b>record group</b>	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
<b>reference data</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>reference object</b>	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
<b>reference transaction</b>	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>results management process</b>	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
<b>role user</b>	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
<b>role</b>	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>routing</b>	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes: email message, electronic form, or worklist entry.
<b>run control</b>	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.
<b>run-level context</b>	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
<b>search query</b>	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
<b>section</b>	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>self-service application</b>	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
<b>session</b>	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
<b>session template</b>	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>sibling</b>	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
<b>single signon</b>	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
<b>source transaction</b>	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
<b>SpeedChart</b>	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>SQR</b>	See <i>Structured Query Report (SQR)</i> .
<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>Structured Query Report (SQR)</b>	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
<b>Summary ChartField</b>	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
<b>summary ledger</b>	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

<b>table</b>	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
<b>TableSet sharing</b>	Specifies control table data for each business unit so that redundancy is eliminated.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>template</b>	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>TimeSpan</b>	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
<b>transaction allocation</b>	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
<b>transaction loading process</b>	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
<b>transaction state</b>	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
<b>transaction type</b>	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
<b>Translate table</b>	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
<b>tree</b>	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
<b>unclaimed transaction</b>	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
<b>uniform resource locator (URL)</b>	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&amp;ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
<b>universal navigation header</b>	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

**URL**

See *uniform resource locator (URL)*.

**user interaction object**

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

**variable**

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

**warehouse**

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

**worksheet**

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

**workflow**

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

**worklist**

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

**zero-rated VAT**

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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