

PeopleSoft Enterprise EPM 8.8x Supply Chain Planning to Financials/Supply Chain Management 9.0 Upgrade

November 2006

PeopleSoft Enterprise EPM 8.8x Supply Chain Planning to Financials/Supply Chain Management 9.0
Upgrade
SKU ufscm9_110906_uepm88xtofscm90
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Contents

Preface

- About This Documentation.....ix**
- Understanding This Documentation.....ix
- Audience.....ix
- Related Information.....ix

Chapter 1

- Converting From EPM 8.8x to FSCM 9.0.....1**
- Understanding Converting Data.....1
- Preparing for the Planning Upgrade.....1
 - Reviewing Guidelines Before Upgrading.....1
 - Updating Configuration Manager Profile.....2
- Exporting SPL Data From EPM 8.8x.....3
 - Running the Export Script.....4
 - Running the Export SQR.....4
- Exporting DPIP Data From EPM 8.8x.....5
 - Running the Export Script DLEPMDPM01E.....5
 - Running the Export Script DLEPMDPM02E.....5
 - Running the Export Script DLEPMDPM04E.....6
- Updating Configuration Manager Again.....6
- Editing DB2 Import Scripts.....8
- Importing SPL Data Into FSCM 9.0.....8
 - Running the Import Script DLEPMPLM01I.....8
 - Running the Import SQR.....9
- Importing DPIP Data Into FSCM 9.0.....9
 - Running the Import Script DLEPMDPM01I.....9
 - Running the Import Script DLEPMDPM02I.....9
 - Running the Import Script DLEPMDPM04I.....10
- Running Data Conversion for Group 1.....10
- Finalizing SPL Conversion.....11

- Index13**

About This Documentation

Understanding This Documentation

This documentation is for customers who have implemented PeopleSoft Enterprise Performance Management (EPM) 8.8x along with PeopleSoft Supply Chain Planning. It supplements the Financials/Supply Chain Management 9.0 upgrade documentation.

Audience

This documentation assumes you have a basic understanding of the PeopleSoft system. One of the most important components to a successful upgrade of your PeopleSoft installation is your onsite experience. PeopleSoft recommends that, prior to performing this upgrade, you have completed at least one PeopleSoft introductory training course.

You should be familiar with your operating hardware environment and have the necessary skills to support that environment. You should also have a working knowledge of SQL and SQL command syntax. Familiarity with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages is necessary. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

See Also

PeopleSoft Customer Connection (Education Services)

Related Information

You can review related information that may help with your PeopleSoft upgrade. You can find the following information on Customer Connection. We post updates and other items on Customer Connection as well.

- **Release Notes.** Read the Release Notes, prior to starting your upgrade, to determine what has changed in the system, and to familiarize yourself with the new features. The Release Notes also indicate whether you need to upgrade any other portions of your system, such as your RDBMS software or batch files.

See PeopleSoft Customer Connection (Site Index, R, release notes, Release, Notes)

- **Upgrades Database.** The Upgrade Documentation database in the Library category of Customer Connection will have other information attained after shipment of this release that may not be included in these instructions. This information may include Updates & Fixes required at upgrade. Always check the Upgrade Documentation database for the most current documentation and information.

See PeopleSoft Customer Connection (Site Index, U, upgrade guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts)

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

See Also

PeopleSoft Customer Connection (www.peoplesoft.com)

CHAPTER 1

Converting From EPM 8.8x to FSCM 9.0

This chapter discusses:

- Understanding Converting Data
- Preparing for the Planning Upgrade
- Exporting SPL Data From EPM 8.8x
- Exporting DPIP Data From EPM 8.8x
- Updating Configuration Manager Again
- Editing DB2 Import Scripts
- Importing SPL Data Into FSCM 9.0
- Importing DPIP Data Into FSCM 9.0
- Running Data Conversion for Group 1
- Finalizing SPL Conversion

Understanding Converting Data

To convert Planning data from EPM 8.8x to FSCM 9.0, you must export the Planning data from the EPM database and then import it into the FSCM 9.0 database.

Note. In this document, “DPIP” is used to refer to Demand Planning and Inventory Policy Planning, and “SPL” is used to refer to Supply Chain Planning. “Source” refers to the EPM 8.8x database, and “Target” refers to the FSCM 9.0 database.

Task 1-1: Preparing for the Planning Upgrade

This section discusses:

- Reviewing Guidelines Before Upgrading
- Updating Configuration Manager Profile

Task 1-1-1: Reviewing Guidelines Before Upgrading

Review the following guidelines before starting your upgrade:

- Have Documentation available

Have copies of PeopleSoft 9.0 Supply Planning, PeopleSoft Demand Planning, and PeopleSoft Inventory Policy Planning PeopleBooks readily available.

- Complete all in-process data transfers

All data transfers in PeopleSoft Supply Planning and PeopleSoft Demand Planning must be completed before the upgrade process begins. This includes all published policies for PeopleSoft Inventory Policy Planning and all forecasts for Demand Planning. The system does not convert transferred data to the new FSCM 9.0 database, since the data that is in the EPM staging tables is not upgraded to the SCM database.

- Run period-end processing

PeopleSoft strongly recommends that you convert your system immediately after a period-end process has been completed.

- Freeze production

You need to freeze production on your old databases during the tasks “Exporting SPL Data From EPM 8.8x” and “Exporting DPIP Data From EPM 8.8x.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Demand Planning Inventory Policy Planning Supply Planning	All	All

Task 1-1-2: Updating Configuration Manager Profile

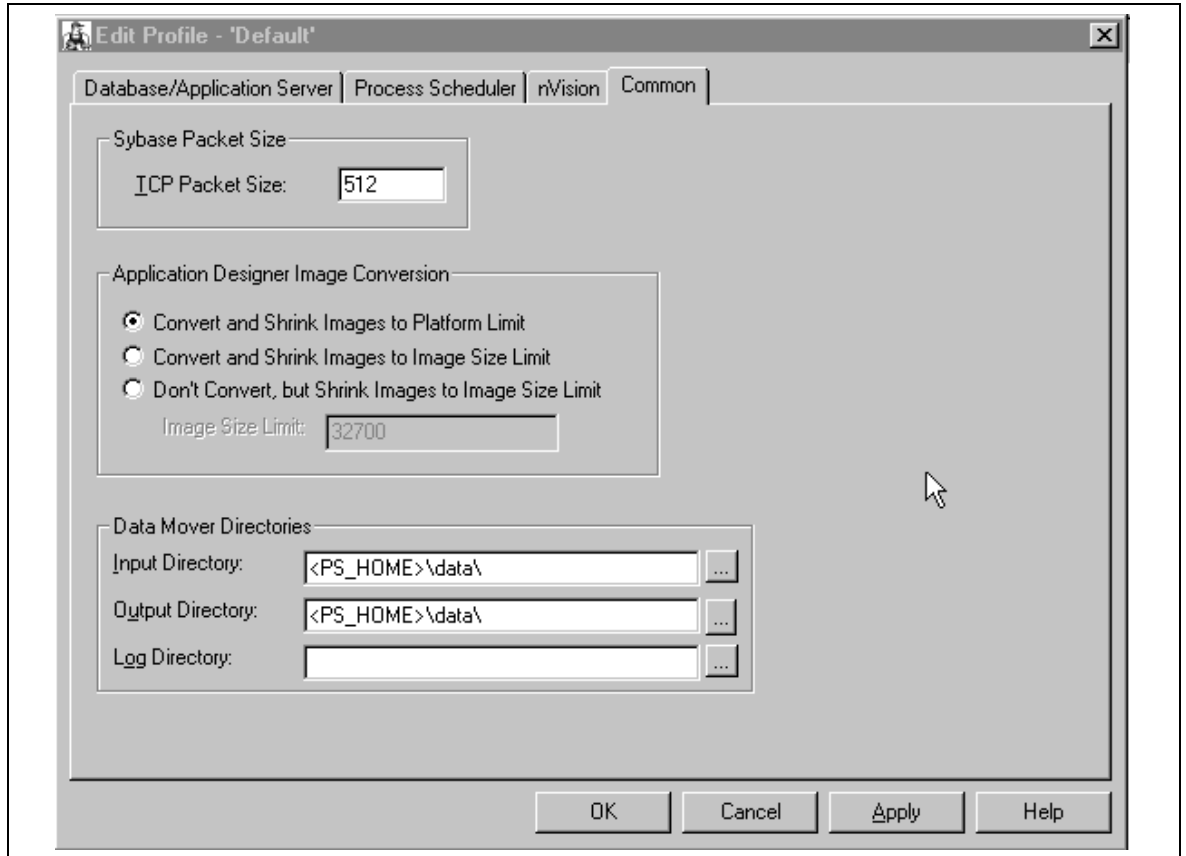
The Configuration Manager default profile needs to be updated to use values for your old release EPM PS_HOME. Change Assistant uses this information to run automated steps for the rest of the upgrade. These are settings on the workstation, and you need to do this for each workstation you may use during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

The following scripts and sqr must be copied from your new release FSCM PS_HOME to your old release EPM PS_HOME:

```
UVPLX98E.SQR
DLEPPLM01E.DMS
DLEPDPM01E.DMS
DLEPDPM02E.DMS
DLEPDPM04E.DMS
```

To update the profile:

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



Edit Profile - Default dialog box

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

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

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Demand Planning Inventory Policy Planning Supply Planning	All	All

Task 1-2: Exporting SPL Data From EPM 8.8x

This section discusses:

- Running the Export Script
- Running the Export SQR

Task 1-2-1: Running the Export Script

This step runs the DLEPMPLM01E.DMS script to export data from PeopleSoft Supply Planning tables in the EPM 8.8x database. The data is exported to DLEPMPLM01E.DAT.

Properties

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

Task 1-2-2: Running the Export SQR

In this step, you run UVPLX98E.SQR to export data from seven PeopleSoft Supply Planning tables in the EPM 8.8x database.

The data is exported to data files from the following tables:

- INSTALLATION_PL
- OPR_DEF_TBL_PL
- PS_PL_PROBINST_HDR
- PS_PL_WB_ROWTYPE
- PS_PL_WB_TMPLATE_D
- PS_PL_WB_TMPLATE_H
- PS_PL_WB_TMPLATE_T

The data files names for the records above are as follows:

- INSTPL.DAT
- OPRDEFTBLPL.DAT
- PLPROBIHDR.DAT
- PLWBROWT.DAT
- WBTMPD.DAT
- WBTMPH.DAT
- WBTMPT.DAT

Properties

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

Task 1-3: Exporting DPIP Data From EPM 8.8x

This section discusses:

- Running the Export Script DLEPMDPM01E
- Running the Export Script DLEPMDPM02E
- Running the Export Script DLEPMDPM04E

Task 1-3-1: Running the Export Script DLEPMDPM01E

In this step, you run the DLEPMDPM01E.DMS script to export data from PeopleSoft Demand Planning and Inventory Policy Planning tables in the EPM 8.8x database. The data is exported to DLEPMDPM01E.DAT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Demand Planning Inventory Policy Planning	All	All

Task 1-3-2: Running the Export Script DLEPMDPM02E

You must run this step only if you are implementing EPM 8.8 Service Pack 1 (8.81) or higher.

In this task, you run the DLEPMDPM02E.DMS script to export data from PeopleSoft Demand Planning and Inventory Policy Planning tables in the EPM 8.8x database. The data is exported to DLEPMDPM02E.DAT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Demand Planning Inventory Policy Planning	All	All

Task 1-3-3: Running the Export Script DLEPMDPM04E

You must run this task only if you are implementing EPM 8.8 Service Pack 2 (8.82) and have applied resolution #588570.

In this step, you run the DLEPMDPM04E.DMS script to export data from PeopleSoft Demand Planning and Inventory Policy Planning tables in the EPM 8.8x database. The data is exported to DLEPMDPM04E.DAT.

Properties

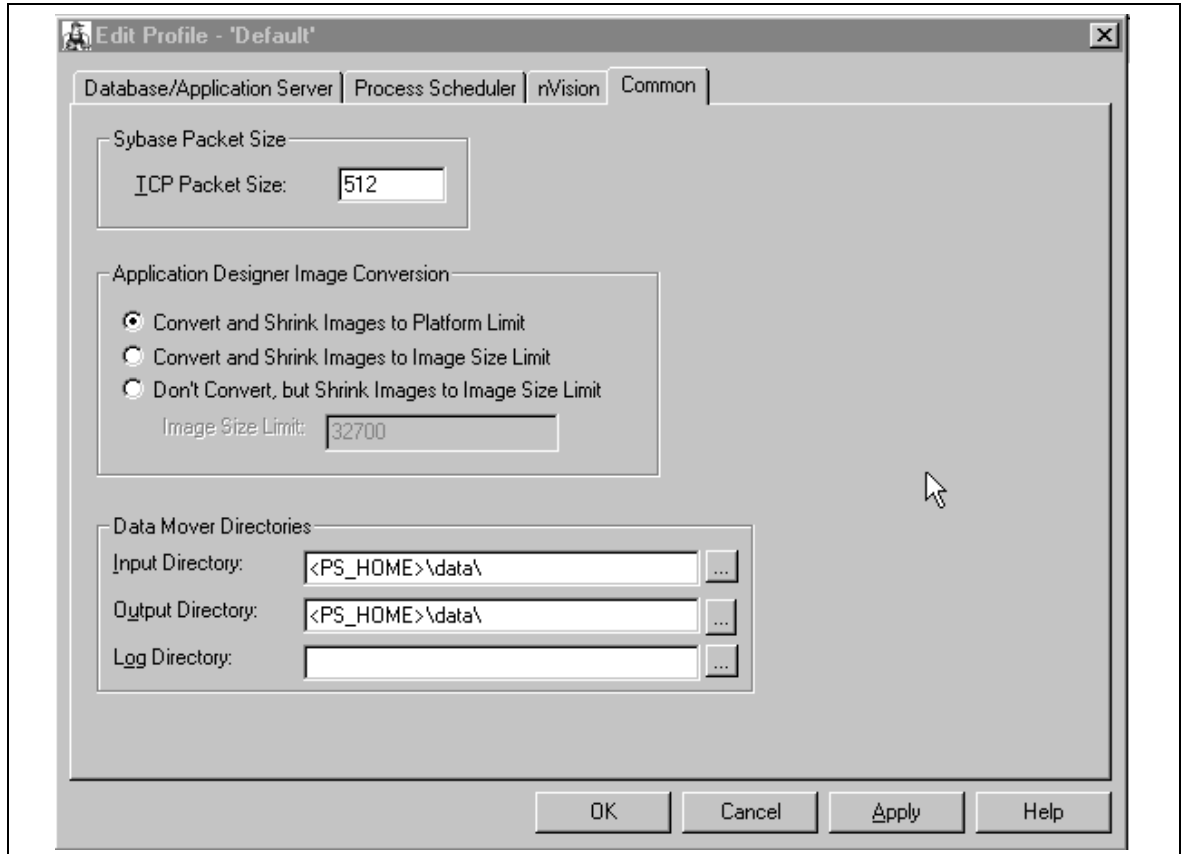
Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Demand Planning Inventory Policy Planning	All	All

Task 1-4: Updating Configuration Manager Again

The Configuration Manager default profile needs to be updated to use values for your *new* release FSCM 9.0 PS_HOME. Change Assistant uses this information to run automated steps for the rest of the upgrade. These are settings on the workstation, and you need to do this for each workstation you may use during the upgrade.

To update the profile:

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



Edit Profile - Default dialog box

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

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

Properties

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

Task 1-5: Editing DB2 Import Scripts

Perform this step only if your database platform is DB2 z/OS. DB2 z/OS scripts that create tables need a `set current sqlid` statement so that the tables are created with the correct owner ID.

Open each script listed below, then uncomment and modify all the DB2-specific statements to reflect your environment.

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

- DLEPMPLM01I.DMS
- DLEPMDPM01I.DMS
- DLEPMDPM02I.DMS—only if you have applied EPM 8.8 Service Pack 1 (8.81) or higher
- DLEPMDPM04I.DMS—only if you have applied EPM 8.8 Service Pack 2 (8.82) and have applied resolution #588570

Properties

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

Task 1-6: Importing SPL Data Into FSCM 9.0

This section discusses:

- Running the Import Script DLEPMPLM01I
- Running the Import SQR

Task 1-6-1: Running the Import Script DLEPMPLM01I

In this step, you run the DLEPMPLM01I.DMS script to import data into Financials/Supply Chain Management 9.0. The data is imported from the DLEPMPLM01E.DAT file.

Properties

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

Task 1-6-2: Running the Import SQR

In this step you run the SQR, UVPLX98I.SQR, to import the data.

Properties

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

Task 1-7: Importing DPIP Data Into FSCM 9.0

This section discusses:

- Running the Import Script DLEPMDPM01I
- Running the Import Script DLEPMDPM02I
- Running the Import Script DLEPMDPM04I

Task 1-7-1: Running the Import Script DLEPMDPM01I

In this step, you run the DLEPMDPM01I.DMS script to import data from Demand Planning and Inventory Policy Planning tables into Financials/Supply Chain Management 9.0. The data is imported from the DLEPMDPM01E.DAT file.

Note. If you may receive the following error in your log file, DLEPMDPM01I.log, “Cannot drop the table 'UPG_RCFIELD_TMP', because it does not exist in the system catalog.” Ignore this error and proceed with the upgrade. If the table name is in this structure 'UPG_NNNNNN_TMP', where NNNNNN is an abbreviation of the record name, then you must check these errors. These temporary tables are being dropped to enable you to run the import script again if needed.

Properties

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

Task 1-7-2: Running the Import Script DLEPMDPM02I

In this step, you run the DLEPMDPM02I.DMS script to import data from Demand Planning and Inventory Policy Planning tables into Financials/Supply Chain Management 9.0. Run this step only if you have EPM 8.8 Service Pack 1 (8.81) or higher. The data is imported from the DLEPMDPM02E.DAT file.

You can edit your template so that the DLEPMDPM02I script can run automatically.

To run this script automatically:

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

Properties

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

Task 1-7-3: Running the Import Script DLEPMDPM04I

In this step, you run the DLEPMDPM04I.DMS script to import data from Demand Planning and Inventory Policy Planning tables into Financials/Supply Chain Management 9.0. Run this step only if you have applied EPM 8.8 Service Pack 2 (8.82) and have applied resolution #588570. The data is imported from the DLEPMDPM04E.DAT file.

You can edit your template so that the DLEPMDPM04I script can run automatically.

To run this script automatically:

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

Properties

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

Task 1-8: Running Data Conversion for Group 1

This step runs the UPG_DATACONV Application Engine program for Group 1 to convert data imported from the EPM 8.8x database.

Properties

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

Task 1-9: Finalizing SPL Conversion

This step will complete the Supply Planning data conversion.

To complete the Supply Planning data conversion:

1. Select Set Up Financials/Supply Chain, Upgrade, Supply Planning Post Upgrade.
2. Add a new run control ID, or use an existing one.
3. Click Run to execute the script.

Properties

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

Index

C

Configuration Manager profile,
updating 2

D

data conversion, running for group 1 10
DB2 import scripts, editing 8
Demand Planning data
 exporting 5
 importing 9
DLEPMDPM01E script, running 5
DLEPMDPM01I script, running 9
DLEPMDPM02E script, running 5
DLEPMDPM04E script, running 6
DLEPMPLM01E script, running 4
DLEPMPLM01I script, running 8

E

editing DB2 import scripts 8
exporting
 Demand Planning data 5
 Inventory Policy Planning data 5
 Supply Planning data 3

F

finalizing SPL conversion 11

I

importing
 Demand Planning data 9
 Inventory Policy Planning data 9
 Supply Planning data 8
Inventory Policy Planning data
 exporting 5
 importing 9

P

Planning upgrade, preparing for 1
preparing
 Planning upgrade 1

R

running
 data conversion for group 1 10

DLEPMDPM01E script 5
DLEPMDPM01I script 9
DLEPMDPM02E script 5
DLEPMDPM02I script 9
DLEPMDPM04E script 6
DLEPMDPM04I script 10
DLEPMPLM01E script 4
DLEPMPLM01I script 8
UVPLX98E 4
UVPLX98I import SQR 9

S

SPL conversion, finalizing 11
Supply Planning data
 exporting 3
 importing 8

U

updating Configuration Manager profile 2
UVPLX98E, running 4
UVPLX98I import SQR
 running 9

