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

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Upgrade
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About This Documentation

Understanding This Documentation

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

This section describes information you should know before you begin working with Oracle's PeopleSoft Enterprise products and documentation, including specific documentation conventions.

Prerequisites

You must complete the tasks in the document *Getting Started on Your PeopleSoft Upgrade* before beginning this upgrade. If you have not yet completed these tasks, do so now.

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

Audience

This documentation assumes you have a basic understanding of the PeopleSoft system. One of the most important components of a successful upgrade of your PeopleSoft installation is your onsite experience.

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

- SQL and SQL command syntax.
- PeopleSoft system navigation.
- PeopleSoft windows, menus, and pages (and how to modify them).
- The World Wide Web.
- Microsoft Windows or Windows NT graphical user interface.

PeopleSoft recommends that you complete training before performing this upgrade.

See PeopleSoft Customer Connection (Oracle University).

Organization

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

- Prepare Your Database

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

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

Related Information

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

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

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

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

CHAPTER 1

Prepare Your Database

This chapter discusses:

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

- Preparing Inventory
- Completing Supply Chain Planning
- Preparing Strategic Sourcing
- Preparing Services Procurement
- Completing Purchasing Tasks
- Setting Up Treasury
- Reporting Row Count for Tables
- Preparing Your Database
- Backing Up Demo Databases
- Renaming Records and Fields
- Comparing Customizations
- Identifying Customizations
- Preparing for the Application Upgrade
- Backing Up After Prepare Your Database

Understanding Database Preparation

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

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

Task 1-1: Understanding Your Upgrade

This section discusses:

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

Understanding PeopleSoft Upgrades

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

Task 1-1-1: Verifying the Software Installation

Before continuing with the upgrade, you must complete all of the tasks in *Getting Started on Your PeopleSoft Upgrade*, “Install the Software Release.” Verify that the following tasks are complete:

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

Properties

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

Task 1-1-2: Defining Upgrade Databases

The following databases will be used during your upgrade:

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

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

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

Properties

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

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

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

- Budget Cycle

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

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

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

- Time and Labor to Projects Interface Considerations

This information applies if you are currently using the Time and Labor to Projects interface, and you intend to continue using this interface with the new PeopleSoft release. Because this interface takes records from Time and Labor in the HRMS database and loads them in the Projects tables in the Financial and Supply Chain Management database, you cannot use this interface until both databases are upgraded.

You can upgrade the two databases independently and in no particular order, but you will not be able to run this interface until both upgrades are complete.

- Performance Recommendations

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

See Appendix: “Improving Performance.”

- Expenses

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

- Mobile Client

No upgrade is provided for Mobile Client. The Client install for users on a prior version of the Mobile Travel & Expenses client would replace the existing database with a new one and will not be upgraded.

Warning! If there are unsubmitted Expense Reports or Time Reports in Mobile Client, they will be lost. It is recommended that all users submit their information to the server before the Expenses and Mobile Upgrade. If you upgrade Expenses before all users have a chance to submit their information, then that information can no longer be submitted.

- Microsoft SQL Server Column Statistics

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

PeopleSoft recommends that you drop all user-defined statistics on columns of PeopleSoft tables before proceeding with your upgrade.

Properties

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

Task 1-2: Copying Your Production Database

This section discusses:

- Making a Copy of Production Database
- Increasing Database Space

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

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

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

Properties

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

Task 1-2-2: Increasing Database Space

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

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

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

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

Properties

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

Task 1-3: Applying Upgrade Planning Files

This section discusses:

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

Understanding Applying Upgrade Planning Files

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

Task 1-3-1: Applying the UPGOPT Project

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

To apply the UPGOPT project:

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

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

6. Using your current codeline, launch Data Mover and sign on to your Copy of Production database.
7. Run the following script to load Access Groups and the Upgrade Query Tree:

\PS_HOME\SCRIPTS\UPGOPT_EP88.DMS

Properties

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

Task 1-3-2: Building the UPGOPT Project

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

To build the UPGOPT project:

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

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

Properties

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

Task 1-3-3: Importing Upgrade Setup Data

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

The script name for your upgrade path is:

PUEP88IMP.DMS

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

The DAT file for your upgrade path is:

PUEP88EXP.DAT

Properties

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

Task 1-3-4: Setting Up Upgrade Planning Security

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

To set up security:

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

Properties

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

Task 1-4: Editing Upgrade Planning DB2 Scripts

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

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

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

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

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

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

```
PUUPX07.DMS
PUEPAU41.DMS
PUEP88IMP.DMS
```

Properties

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

Task 1-5: Updating Statistics

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

See Appendix: “Improving Performance.”

Properties

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

Task 1-6: Running Initial Audit Reports

This section discusses:

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

Understanding Running Initial Audit Reports

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

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

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

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

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

See Review the Initial Audits.

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

Properties

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

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

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

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

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

See Review the Initial Audits.

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

Properties

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

Task 1-6-3: Create the INITALTAUD Project

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

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

To create the INITALTAUD project:

1. Launch PeopleTools and sign on to the Target database.
2. From Application Designer, select File, New...
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project...
5. Select Records from the Object Type drop-down list box.
6. Select Table from the Type drop-down list box.
7. Click Insert, and then click Select All.
8. Click Insert, and then click Close.
9. Select File, Save All.
10. Enter the project name *INITALTAUD*.

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

11. Click OK.

Properties

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

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

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

Properties

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

Task 1-6-5: Review the Initial Audits

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

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

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

The Alter Audit produces the scripts INITIALAUD_ALTTBL.SQL, INITIALAUD_CRTIDX.SQL, and INITIALAUD_CRTTRG.SQL. These scripts contain SQL that corrects any discrepancies between your PeopleTools Record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies.

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

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

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

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

Properties

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

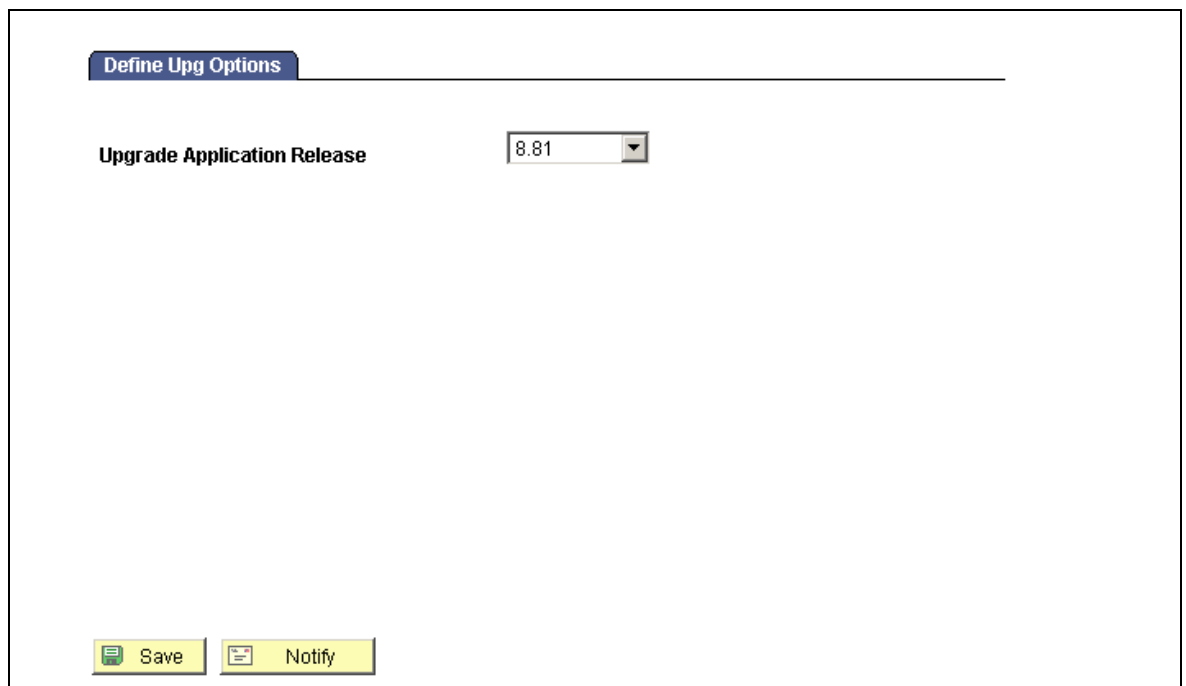
Task 1-7: Performing General Options Setup

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

To perform general options setup:

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

The Define Upg Options page appears:



The screenshot shows a web-based interface for defining upgrade options. At the top, there is a blue button labeled "Define Upg Options". Below this, the text "Upgrade Application Release" is displayed next to a dropdown menu that currently shows "8.81". At the bottom of the page, there are two yellow buttons: "Save" and "Notify".

Define Upgrade Options page

2. Enter the release number of your target database in the Upgrade Application Release field.
Some of the data conversions only run for specific target releases.

Properties

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

Task 1-8: Defining Services Procurement Options

To define Services Procurement upgrade options:

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

The following page appears:

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Customize Page | http

sPro Upgrade Options

SetID:

Administrator Role:

Approver Role:

Enter Role Distribution List for

Requester:

Description:

Time Approver:

Description:

Invoice Approver:

Description:

sPro Upg Options page

2. Competencies can be grouped by setID in the new release. Enter the default setID for all of your competencies.
3. Enter the role for your administrator and approver users in the corresponding fields. The roles will be used to update the user information during the upgrade process.
4. For customers upgrading from PeopleSoft 8.80, the new work order alert notification feature requires that role distribution lists be created. The role distribution lists are generated based on

users belonging to the following roles: Requester, Time Approver, and Invoice Approver. To automatically add users from these roles to the role distribution list, enter the three role distribution list names and their descriptions that you want to create.

For customers upgrading from PeopleSoft 8.8 SP1 and later, the role distribution list feature has been enhanced to incorporate work order alert notification functionality. If you are currently using role distribution lists, you can select your existing role distribution list and the upgrade process will automatically associate users with the roles of Requester, Time Approver, or Invoice Approver to the distribution list. If you do not currently use distribution lists or you do use them but want to create a new role distribution list for work order alert notifications, you can enter the role distribution list name and description for each role and the upgrade process will automatically generate them for you.

Properties

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

Task 1-9: Reviewing Process Scheduler Processes

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

To view processes from the Process Monitor:

1. Select PeopleTools, Process Scheduler, Process Monitor.
2. Enter an appropriate time limit (such as the last hour, last day, or longer limit) and click Refresh.
3. Review any processes that did not end with a Run Status of Success or Cancelled. Any outstanding processes that you want to complete before proceeding with the upgrade should be completed at this time.

Properties

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

Task 1-10: Reviewing Country Data

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

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

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

To run the Country Table query:

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

UPG_ECY01

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

Properties

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

Task 1-11: Reviewing ChartField Configuration

In this task, you must carefully review your ChartField configuration actions in preparation for running the configuration process in Chapter 4.

Note. If you have *not* added any new ChartFields, you can skip this task. If you have added new ChartFields, all the new objects, tables, views, pages, and so forth, that you created when you initially run the ChartField Configuration process need to be identified and copied over when you review your customizations in Chapter 3.

To review the ChartField Configuration actions:

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

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

Properties

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

Task 1-12: Preparing Promotions

This section discusses:

- Running Promotions PreUpgrade Reports
- Reviewing Promotions PreUpgrade Reports

Task 1-12-1: Running Promotions PreUpgrade Reports

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

To run the pre-upgrade reports:

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

Customer Specific Promotion Contact, PUEPP155.SQR

Properties

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

Task 1-12-2: Reviewing Promotions PreUpgrade Reports

This section discusses:

- Reviewing Report PUEPP155

Reviewing Report PUEPP155

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

To update customer-specific promotions contact ID information:

1. Select Promotions, Manage Promotions, Create Customer-Specific Promo.
2. Select Find an Existing Value.
3. From the report results, enter the setID, Promotion Code, and Customer ID information.
4. On the Promotion Details page, add a Contact ID for the customer listed in the report (a default Contact ID may appear when you enter the page).
5. Click Save.

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

Properties

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

Task 1-13: Completing Billing Tasks

This section discusses:

- Running Billing PreUpgrade Reports
- Reviewing the Billing PreUpgrade Reports

Task 1-13-1: Running Billing PreUpgrade Reports

These reports show you data conditions that you should address before the upgrade begins. An explanation of the reports and directions for the output information follows these instructions.

To run the pre-upgrade reports:

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

Bills in Process, PUCGY002.SQR

Billing Interface Process, PUCGY003.SQR

Properties

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

Task 1-13-2: Reviewing the Billing PreUpgrade Reports

This section discusses:

- Reviewing Report PUCGY002
- Reviewing Report PUCGY003

Reviewing Report PUCGY002

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

To restart aborted bill processes:

1. Select PeopleTools, Process Scheduler, Process Monitor.

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

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

Reviewing Report PUCGY003

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

To restart pending bill processes:

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

Properties

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

Task 1-14: Setting Up Receivables

This section discusses:

- Posting Receivables Transactions
- Processing Credit Card Payments
- Generating Customer Conversation Letters
- Establishing Customer Conversation Currency
- Reviewing Project Data in Receivables
- Reviewing Rate Type Defaults
- Reviewing Group Type Field Data

Task 1-14-1: Posting Receivables Transactions

Before beginning the data conversion for Receivables, all electronic payments (Lockbox, EDI) must be successfully processed by the AR Payment Interface. Any unmatched Item or Customer remittance must be deleted at Accounts Receivable, Payments, Electronic Payments, Delete Remittance.

Successfully post all documents (worksheets, drafts, direct debits, payments, maintenance, transfers, finance charge groups, unpost groups, online pending items groups, direct journals, and so forth) by AR Receivable Update, where applicable.

To post receivables transactions:

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

Properties

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

Task 1-14-2: Processing Credit Card Payments

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

To process credit card payments:

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

Properties

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

Task 1-14-3: Generating Customer Conversation Letters

All Customer Conversation Letters that have not been created, must be generated before the upgrade.

Note. After the upgrade, Customer Conversation Letters cannot be created from existing customer conversations. See the reference below for more information.

See “Complete Database Changes” Completing Receivables

To run customer follow up letters:

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

Properties

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

Task 1-14-4: Establishing Customer Conversation Currency

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

To set the default currency code:

1. Select Set up Financials/Supply Chain, Upgrade, Define Conversation Currency.
The AR Customer Conversations page appears.
2. Select the currency code from the list of currencies.
3. Click Save.
4. Check the Upgrade Existing Currency Code on Existing Conversations check box to set up a default currency for all customer conversations.

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

Properties

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

Task 1-14-5: Reviewing Project Data in Receivables

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

- BUSINESS_UNIT_PC
- PROJECT_ID
- ACTIVITY_ID

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

To run the ITEM query:

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

UPG_ARP10

Properties

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

Task 1-14-6: Reviewing Rate Type Defaults

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

Properties

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

Task 1-14-7: Reviewing Group Type Field Data

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

To set the value for the group type:

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

The Group Type Upgrade page appears:

Group Type Upgrade page

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

Properties

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

Task 1-15: Verifying Grant Management Processes

In this task, verify the completion of grant management processes.

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

To verify the completion of grant management processes:

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

```
UPG_GFGMF02
```

7. Verify that no rows are returned.

Properties

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

Task 1-16: Preparing Grants Defaults

In the new PeopleSoft Financials release, PeopleSoft Grants introduced a new functionality to identify at the Business Unit level, the setup level of various components of the Pre Award. By setting these defaults prior to running the upgrade, the following fields are populated with the defaults:

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

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

- GM_PROPOSAL.GM_CERT_LVL
- GM_PROPOSAL.GM_COMP_LVL

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

To set up the Grants defaults:

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

Properties

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

Task 1-17: Setting Up Projects

This section discusses:

- Processing Accounts Payable Voucher
- Processing Third Party Transactions

Task 1-17-1: Processing Accounts Payable Voucher

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

To process accounts payable vouchers:

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

Properties

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

Task 1-17-2: Processing Third Party Transactions

This section discusses:

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

Understanding Third Party Transactions

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

Processing Third-Party Transactions

To process third-party transactions:

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

Processing Third-Party Projects and Activities

To load third-party projects and activities:

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

Properties

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

Task 1-18: Setting Up Projects Integration

This section discusses:

- Running Pending Assets into AM Integration

Task 1-18-1: Running Pending Assets into AM Integration

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

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

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

To run pending assets into AM Integration:

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

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

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

```
UPG_PCY05
```

This query should return zero rows.

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

Properties

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

Task 1-19: Managing Expense Approvals

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

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

Properties

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

Task 1-20: Preparing Asset Management

This section discusses:

- Running Asset Management Interface Programs

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

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

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

To run the AM interface programs:

1. Select Asset Management, Send/Receive Information, Retrieve Info from AP/PO.

2. Add a new run control ID.

The Payables/Purchasing Interface page appears:

Payables/Purchasing Interface

Run Control ID: S2 [Report Manager](#) [Process Monitor](#) [Run](#)

*Request ID: S S

*Process Frequency: Process Once [Interface Asset Information](#)

Process Option: Process All Pending Entries

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Payables/Purchasing Interface page

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

The Run Transaction Loader page appears:

Run Transaction Loader

Run Control ID: S1 [Report Manager](#) [Process Monitor](#) [Run](#)

Run Control Parameters [Find](#) [View All](#) First 1 of 1 Last

*Request ID: 1 Process Frequency: Once ☐ Process AM Integration

Interface ID: 10000004 To Interface ID: 90000002 System Source: [Find](#)

Find Trans Load ID (optional)

System Source: [Find](#) Load Type: [Find](#)

Load Status: Pending ☒ Financial Record ☐ Physical Records [Search](#)

Interface ID	System Source	Load Type	Load Description	Load Status	Total Items in Query
10000004	BAM	RET	Asset Retirement	NEW	4
10000065	BAM	IUO	Inter-Unit Transfer Out Side	NEW	6
90000001	CNV	CN1	Conversion of First Book	NEW	1
90000002	CNV	CN1	Conversion of First Book	NEW	1

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

Run Transaction Loader page

9. Enter a request ID.
10. Set the process frequency to *Once*.
11. Set the Interface ID field to the first interface ID from the search list.
12. Set the To Interface ID field to the last interface ID from the search list.
13. Click the Run button to run the AMIF1000 program.

Properties

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

Task 1-21: Managing Limits

This section discusses:

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

Understanding Limit Management

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

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

Task 1-21-1: Reviewing Existing Limits

In the prior release, the Limit Override flag resided on the contract detail line. Once this field was selected, the previously defined limit would be deleted and all transactions associated with that contract line would then be billed, regardless of whether they had previously been over the limit.

In the new PeopleSoft release this flag is removed, and instead you will be able to release individual transactions for billing and booking of revenue.

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

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

Note. To understand billing for transactions that are over the limit, read about the new Review and Manage Limits component and the manual release of specific excess transactions feature in *PeopleSoft Enterprise 9.0 Contracts PeopleBook*.

Properties

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

Task 1-21-2: Managing Limits in the New Release

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

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

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

Properties

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

Task 1-22: Processing Bill Plans

This section discusses:

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

Understanding Processing Bill Plans

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

Note. If you do not have any Bill Plans with summarized Bill Plan lines attached to amount-based Contract lines, you can skip this step.

You will need to complete the following tasks to process Bill Plans:

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

Note. Keep track of all Contract lines that were assigned to summarized Bill Plan lines, because as part of the post-upgrade process, you will add summarization information to those attached Bill Plans.

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

To run the summarized Bill Plans query:

1. Select Reporting Tools, Query, Query Viewer.
2. Search for the query UPG_CAP02 and click the Run to HTML link in the result set.
3. Save the results of the query. This is the list of Bill Plans from which you will need to delete summarized Bill Plan lines.

Properties

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

Task 1-22-2: Processing Ready Bill Plans

For Bill Plans with the status *Ready* that have summarized Bill Plan lines and are attached to amount-based Contract lines, delete the summarized Bill Plan lines and replace them with individual Bill Plan lines.

To process Bill Plans with the status *Ready*:

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

Note. In the query results, Bill Plans that are *ready* have the billing status *RDY*.

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

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

Properties

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

Task 1-22-3: Processing Pending Bill Plans

For Bill Plans with the status *Pending* that have summarized Bill Plan lines and are attached to amount-based Contract lines, delete the summarized Bill Plan lines and replace them with individual Bill Plan lines.

To process Bill Plans with the status *Pending*:

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

Note. In the query results, Bill Plans that are *pending* have the billing status *PND*.

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

Properties

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

Task 1-22-4: Processing In Progress Bill Plans

This section discusses:

- Understanding Processing In Progress Bill Plans

- Processing Bill Plans to Completion
- Reversing the Bill Plans

Understanding Processing In Progress Bill Plans

In this step, you process Bill Plans with the status *In Progress* that have summarized Bill Plan lines and are attached to amount-based Contract lines.

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

You can process Bill Plans with the status *In Progress* using either of the following options:

- Fully process the Bill Plan to a status of *Complete*.
- Reverse the Bill Plan.

Processing Bill Plans to Completion

To process Bill Plans to a status of *Complete*:

1. Select Billing, Interface Transactions, Process Billing Interface, Billing Interface.
2. Make sure the Billing Interface program has been run so that all bill lines in the interface table are on invoices.
3. Select Billing, Generate Invoices, Non-Consolidated, Finalize and Print Invoices, Finalize and Print.
4. Run the Finalize and Print process for those bills.
5. Select Billing, Generate Invoices, Utilities, Update Contract/Projects Data.
6. Run the Projects/Contracts Intrfc program to update Contracts.
7. Select Customer Contracts, Schedule and Process Billing, Process Other Billing Methods.
8. Run the Contracts/Billing Interface Process to update the Bill Plan and event statuses.

Reversing the Bill Plans

To reverse Bill Plans in Contracts:

1. Select Customer Contracts, Review Billing, Plans.
2. Set the Bill Plans to *Reversal In Progress*.
3. Select Customer Contracts, Schedule and Process Billing, Process Billing.
4. Run the Contracts/Billing Interface process to send the updated Bill Plan statuses to Billing.
5. Select Billing, Interface Transactions, Process Billing Interface, Billing Interface.
6. Make sure the Billing Interface program has been run so that all bill lines in the interface table are on invoices.
7. Select Billing, Generate Invoices, Non-Consolidated, Finalize and Print Invoices, Finalize and Print.
8. Run the Finalize and Print process for those bills.
9. Select Billing, Generate Invoices, Utilities, Update Contract/Projects Data, Run BI PC/CA Intrfc.
10. Run the Projects/Contracts Intrfc program to update contracts.

11. After the bills have been fully reversed, go to the Bill Plans and unassign and reassign them as follows:
 - a. Select Customer Contracts, Schedule and Process Billing, Assign Bill Plan.
 - b. To unassign the Bill Plans, select the contract lines you want to unassign and click the Unassign button.
If the bills have not been fully reversed for the Bill Plan, you will receive an error message.
 - c. To reassign the contract lines to a new Bill Plan, select the contract lines and then click the Assign button.
 - d. In the Bill Plan, select the Billing Plan Lines tab.
 - e. Select all Contract lines located in the Contract Lines Not Associated with Billing Plan Lines grid.
 - f. In the radio button section Billing Plan Line Creation Opt, select the Create individual lines option.
 - g. Click the Create Lines button.
 - h. Click Save.

Properties

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

Task 1-23: Reviewing Burden Plans

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

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

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

To identify the contract lines :

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

UPG_CAP01

Properties

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

Task 1-24: Processing Pending Amendments

This section discusses:

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

Understanding Pending Amendments

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

Task 1-24-1: Running Outstanding Amendments Query

To run a query on outstanding Amendments:

1. Select Reporting Tools, Query, Query Viewer.
2. Search for the query UPG_CAP03 and click the Run to HTML link in the result set.
3. Save the results of the query. This is the list of outstanding Amendments that need to be processed.

Properties

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

Task 1-24-2: Cancelling an Amendment

To cancel an Amendment:

1. Select Customer Contracts, Create and Amend, General Information.
2. Specify the Contract you want to update.
3. Click the Amendments tab.
4. In the Amendments grid, click the Detail link for an Amendment with a status of *Ready* or *Pending*.

5. On the Amendment Detail page, set the Amend Status field to *Cancelled*.
6. Click Save.

Properties

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

Task 1-24-3: Processing an Amendment to Complete

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

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

When you change the status to Ready, the Process Amendment button appears above the Amend Status field.

6. Click the Process Amendment button to process the Amendment.

Properties

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

Task 1-25: Executing Match Rules and Transactions

This section discusses:

- Documenting New Match Rules
- Documenting New Receipt Aware Criteria
- Customizing Pay Cycle Definition
- Closing Payables Pay Cycles
- Posting Payables Transactions
- Running Journal Generator Edit and Post
- Canceling Rescheduled Payments
- Flagging Bad Effective Dated Withholding Entities

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

Task 1-25-1: Documenting New Match Rules

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

See “Complete Database Changes,” Performing Payables Setup.

To document new match rules:

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

Properties

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

Task 1-25-2: Documenting New Receipt Aware Criteria

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

To document new Receipt Aware Criteria:

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

Properties

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

Task 1-25-3: Customizing Pay Cycle Definition

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

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

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

See Also

PeopleSoft Enterprise 9.0 Payables PeopleBook

Properties

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

Task 1-25-4: Closing Payables Pay Cycles

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

To find all Pay Cycles that need to be completed or reset:

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

UPG_APY01

Properties

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

Task 1-25-5: Posting Payables Transactions

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

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

To post Payables transactions:

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

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

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

Properties

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

Task 1-25-6: Running Journal Generator Edit and Post

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

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

To run journal generator, edit, and post:

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

Properties

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

Task 1-25-7: Canceling Rescheduled Payments

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

To cancel any rescheduled payments:

1. Select Accounts Payable, Payments, Pay Cycle Processing, Cancel Rescheduled Payments.
2. Enter a Run Control ID.

3. Select Search to proceed with the cancellation process.

Properties

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

Task 1-25-8: Flagging Bad Effective Dated Withholding Entities

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

To run the Withholding Entities report:

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

```
UPG_APU30
```

Properties

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

Task 1-26: Completing Batch Transactions

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

To complete or cancel BCT transactions:

1. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
2. Run the report Outstanding Batch Transactions, PUCGY257, to retrieve business units with transactions that have not been closed or cancelled.
3. Select SCM Integrations, Transaction Error Handling, Maintain Transactions.
4. For every business unit listed in the report:

- a. Click the Search button (flashlight).
 - b. For each entry that does not have the status *Complete*, click the EIP Control ID and either complete or cancel the transaction.
5. If any rows are returned, you must repeat the steps for every applicable business unit.

Properties

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

Task 1-27: Preparing Inventory

This section discusses:

- Running the Inventory PreUpgrade Report
- Reviewing PreUpgrade Inventory Report
- Confirming Shipping and Depleting All Orders
- Costing and Posting Inventory Transactions
- Running Inventory Balances Report

Task 1-27-1: Running the Inventory PreUpgrade Report

This report shows you data conditions that you should address before the upgrade begins. An explanation of the report and directions for the output information follows these instructions.

To run the pre-upgrade report:

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

Un-Invoiced Billing Line Count, PUCGY251.SQR

Properties

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

Task 1-27-2: Reviewing PreUpgrade Inventory Report

The PUCGY251 report identifies any billing lines by Business Unit in the shipping interface table (PS_SHIP_INF_INV) that have been run through the INS6300/OMBILL process but have not been run through the billing interface process BIIF0001. A total number of rows will be listed on the report. The rows must be processed through Billing so that they appear on an invoice prior to running the upgrade.

Note. If you do not process these outstanding billing lines, you will not be able to invoice these entries after the upgrade.

Properties

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

Task 1-27-3: Confirming Shipping and Depleting All Orders

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

To confirm, ship, and deplete orders:

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

Properties

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

Task 1-27-4: Costing and Posting Inventory Transactions

In this step, you cost all Inventory transactions and post them to the General Ledger.

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

To cost and post Inventory transactions:

1. If you do not have the Coalesced codeline, perform the following steps:
 - a. Run the transaction costing process by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Inventory Transaction Costing.
 - b. Run accounting line creation by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Accounting Line Creation.

2. If you have the Coalesced codeline, perform the following steps:
 - a. Run both the transaction costing and accounting line creation processes by selecting Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Cost Accounting Creation.
 - b. Select the options Cost Inventory Transactions and Creating Accounting Lines for all transaction groups.
3. Select Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Accounting Line Errors.
4. Verify there are no errors for any Inventory Business unit.
5. Run journal generator by selecting General Ledger, Journals, Subsystem Journals, Generate Journals.
6. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
 Run the report Verify Costing Transaction, PUCGY303 to ensure that all Inventory and, if applicable, Manufacturing transactions are posted to General Ledger.
 This report verifies that all Inventory transactions have been costed and posted to the General Ledger.
7. If any unprocessed transactions exist, you will not be able to reconcile costing after the upgrade. Repeat steps 1 through 5 until there are no unprocessed transactions on the report.

Properties

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

Task 1-27-5: Running Inventory Balances Report

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

To run the inventory balances report:

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

Properties

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

Task 1-28: Completing Supply Chain Planning

This section discusses:

- Completing Supply Planning Processes

Task 1-28-1: Completing Supply Planning Processes

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

- Running Ascential to bring Planning Instance data back from EPM to SCM.
- Running the Supply Planning Post Application Engine.
- Applying all Supply Planning messages in PeopleSoft Enterprise Production Management, PeopleSoft Enterprise Purchasing (if applicable), and PeopleSoft Enterprise Inventory (if applicable).

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

Properties

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

Task 1-29: Preparing Strategic Sourcing

This section discusses:

- Reviewing Event Status

Task 1-29-1: Reviewing Event Status

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

To determine event status:

1. Select Sourcing, Maintain Events, Event Workbench.
2. Use the Event Status field to filter for any events in the posted status.
3. Cancel or award any posted events by either clicking on the Cancel icon or clicking on the Analyze Bid icon.

Properties

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

Task 1-30: Preparing Services Procurement

This section discusses:

- Running the PreUpgrade sPro Reports
- Reviewing the PreUpgrade sPro Reports
- Running the PreUpgrade sPro Queries
- Reviewing the PreUpgrade sPro Queries
- Completing Cost Collection

Task 1-30-1: Running the PreUpgrade sPro Reports

In this step, run the Services Procurement pre-upgrade reports.

To run the pre-upgrade reports:

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

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

Properties

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

Task 1-30-2: Reviewing the PreUpgrade sPro Reports

This section discusses:

- Reviewing Report PUEPQ712
- Reviewing Report PUEPQ705
- Reviewing Report PUEPP704

Reviewing Report PUEPQ712

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

Reviewing Report PUEPQ705

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

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

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*.

Reviewing Report PUEPP704

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

Properties

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

Task 1-30-3: Running the PreUpgrade sPro Queries

In this step, you run the Services Procurement pre-upgrade queries.

To run the pre-upgrade queries:

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

sPro Time Template BU to setID, UPG_SPP706

sPro Vendor to Common Vendor, UPG_SPM709

Properties

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

Task 1-30-4: Reviewing the PreUpgrade sPro Queries

This section discusses:

- Reviewing Query UPG_SPP706
- Reviewing Query UPG_SPM709

Reviewing Query UPG_SPP706

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

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

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*, “Service Templates, Calendars, and Time Reporting Rules.”

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

Reviewing Query UPG_SPM709

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

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

Properties

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

Task 1-30-5: Completing Cost Collection

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

To run the Cost Collection process:

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

Properties

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

Task 1-31: Completing Purchasing Tasks

This section discusses:

- Loading Change Requests

Task 1-31-1: Loading Change Requests

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

Properties

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

Task 1-32: Setting Up Treasury

This section discusses:

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

Understanding the Treasury Setup

In this task, you rerun the Auto Position process for all deals. Run this task only if you licensed Treasury.

Task 1-32-1: Running Auto Position Process

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

Note. Complete this step only if you license Treasury.

To rerun auto position process:

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

Properties

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

Task 1-32-2: Deleting Duplicate Securities Data

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

To identify duplicate data:

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

```
UPG_TRU00
```

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

3. Log into the query tool of your choice.
4. Enter every Security ID that shows up in the query display for Bind Variable1.
Bind Variable2 is the Business Unit for the security data you wish to retain.
5. Run the following SQL:

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

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

Properties

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

Task 1-33: Reporting Row Count for Tables

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

Properties

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

Task 1-34: Preparing Your Database

This section discusses:

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

Understanding Database Preparation

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

Task 1-34-1: Verify Database Integrity

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

Properties

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

Task 1-34-2: Clean the PSOBJCHNG Table

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

```
DELETE FROM PSOBJCHNG
```

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

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

Properties

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

Task 1-34-3: Drop PeopleTools Tables

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

Drop the following tables:

- PS_PSMCFQUEUESLANG

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

- PSOPTSTATUS

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

Properties

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

Task 1-34-4: Shrink Images

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

To shrink images using a PeopleTools release later than 8.44.14:

1. Launch Configuration Manager and select the Profile tab.

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

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

6. Launch Application Designer.
7. Select Tools, Upgrade, Convert Images...
8. Select Convert Static Images in Image Catalog.
9. Click Start to convert or shrink images.
10. Select Tools, Upgrade, Convert Images...
11. Select Convert Dynamic Images for fields. Select the box for all of the fields listed.
12. Click Start to convert or shrink images.

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

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

To manually save images greater than 32 KB:

1. In Application Designer, insert your images into a project. Select Insert, Definitions into Project.
2. Save the project.
3. Copy the images to file. Select Tools, Upgrade, Copy Project to File.
4. Delete the rows for the images in your project from the PSCONTDEFN table.
5. When you are finished with the upgrade, copy the project from file to restore your custom images. Select Tools, Upgrade, Copy Project from File.

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

Properties

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

Task 1-34-5: Purge Message Queues

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

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

```
APPMSPURGEALL.DMS
```

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

Properties

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

Task 1-35: Backing Up Demo Databases

This section discusses:

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

Task 1-35-1: Backing Up Copy of Current Demo

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

Properties

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

Task 1-35-2: Backing Up New Release Demo

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

Properties

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

Task 1-36: Renaming Records and Fields

This section discusses:

- Understanding Renaming Records and Fields
- Running the RNEPUPM14 Script
- Running the RNEPAUCM01 Script
- Running the RNEPEMT01 Script
- Running the RNEPGMT01 Script
- Running the RNEPLCT01 Script
- Retaining the Target Rename Log Files
- Running RNEPUPM14 Script on Copy of Current Demo
- Running RNEPAUCM01 Script on Copy of Current Demo
- Running RNEPEMT01 Script on Copy of Current Demo
- Running RNEPGMT01 Script on Copy of Current Demo
- Running RNEPLCT01 Script on Copy of Current Demo

Understanding Renaming Records and Fields

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

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

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

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

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

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

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

Task 1-36-1: Running the RNEPUPM14 Script

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

Properties

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

Task 1-36-2: Running the RNEPAUCM01 Script

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

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

To run this script automatically:

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

Properties

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

Task 1-36-3: Running the RNEPEMT01 Script

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

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

To run the script automatically:

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

Properties

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

Task 1-36-4: Running the RNEPGMT01 Script

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

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

To run the script automatically:

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

Properties

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

Task 1-36-5: Running the RNEPLCT01 Script

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

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

To run the script automatically:

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

Properties

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

Task 1-36-6: Retaining the Target Rename Log Files

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

Properties

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

Task 1-36-7: Running RNEPUPM14 Script on Copy of Current Demo

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

Properties

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

Task 1-36-8: Running RNEPAUCM01 Script on Copy of Current Demo

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

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

To run the script automatically:

1. Select this step and open the Step Properties dialog box.

2. Change the Type from ManualStop to DataMoverUser, and click OK.
3. In your upgrade job, mark the step as Run.

Properties

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

Task 1-36-9: Running RNEPEMT01 Script on Copy of Current Demo

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

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

To run the script automatically:

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

Properties

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

Task 1-36-10: Running RNEPGMT01 Script on Copy of Current Demo

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

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

To run the script automatically:

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

Properties

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

Task 1-36-11: Running RNEPLCT01 Script on Copy of Current Demo

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

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

To run the script automatically:

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

Properties

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

Task 1-37: Comparing Customizations

This section discusses:

- Modifying Compare Report Options
- Running Compare UPGCUST
- Running UPGCUST Filter Script
- Reviewing UPGCUST Compare Log
- Restoring Copy of Current Demo

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

Task 1-37-1: Modifying Compare Report Options

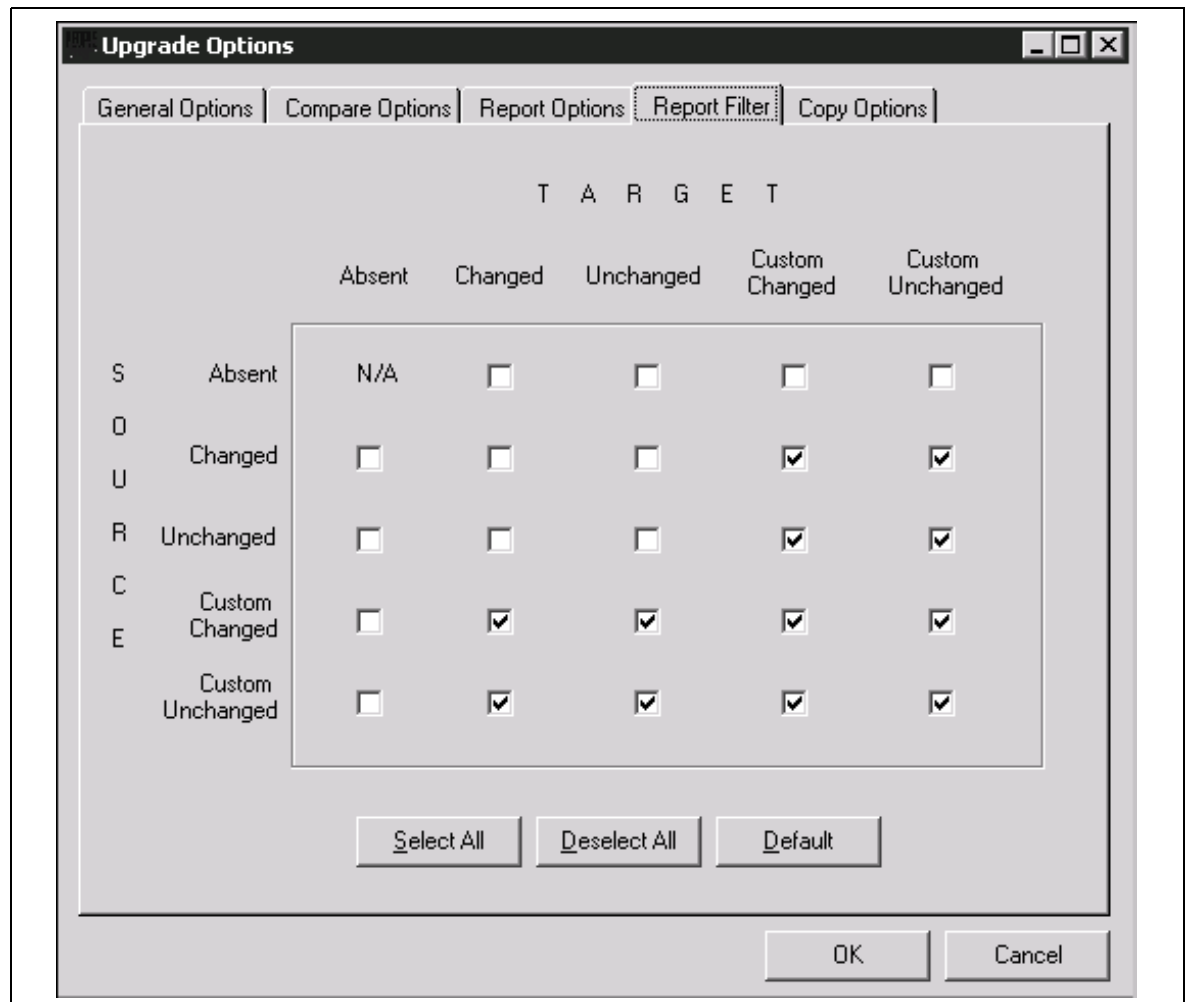
PeopleSoft Change Assistant templates are delivered with the default report filters turned on. This limits the size of the reports and keeps them manageable. Before you start the compare, review the compare options in your Change Assistant template step properties and modify them based on your specific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

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

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

To modify the upgrade compare options:

1. Highlight the Run Compare UPGCUST step and right-click.
2. Select Step Properties
The Step Definition dialog box appears.
3. Click Upgrade.
The Compare and Report dialog box appears.
4. Click Options.
5. Select the Report Filter tab.
The default options include your custom changes on the reports.
6. Change the default options as necessary and click OK.



Upgrade Options page, Report Filter tab

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

Properties

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

Task 1-37-2: Running Compare UPGCUST

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

- Application packages.
- Application package PeopleCode.

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

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

Properties

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

Task 1-37-3: Running UPGCUST Filter Script

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

The script name for your upgrade is:

PUUPX99.DMS

See Appendix: “Using the Comparison Process.”

Properties

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

Task 1-37-4: Reviewing UPGCUST Compare Log

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

Properties

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

Task 1-37-5: Restoring Copy of Current Demo

Restore your Copy of Current Demo database from the backup taken earlier in the upgrade. The backup was taken before rename scripts ran against the Copy of Current Demo. This is done to restore the environment to a PeopleSoft-delivered demo implementation.

Properties

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

Task 1-38: Identifying Customizations

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

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

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

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

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

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

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

Review the tables that will be overwritten in these scripts:

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

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

DLEPLASYSE.DMS

DLEPLASYSI.DMS

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

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

See Also

“Apply Application Changes,” Loading Data for Data Conversion.

“Apply Application Changes,” Loading Data to Complete System Setup.

Properties

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

Task 1-39: Preparing for the Application Upgrade

This section discusses:

- Creating a Copy of RecField Definitions
- Creating a Copy of DbField Definitions
- Deleting Old Pagelet Wizard Data
- Exporting Upgrade Setup Data
- Dropping Indexes
- Editing the System Data Swap Script
- Editing the PeopleTools Swap Script

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

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

The script name is:

PUUPX07.DMS

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

Properties

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

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

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

PUEPFAU41.DMS

Properties

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

Task 1-39-3: Deleting Old Pagelet Wizard Data

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

In this step, you run a script to delete the Common Component Pagelet Wizard (PW) data to ensure that when the UPGPT846PP conversion program is run subsequently, the old existing Common Components Pagelet Wizard data is not re-entered into the PeopleTools Pagelet Wizard tables. If you do not run the script, then items that were removed from the PeopleTools version of Pagelet Wizard, but still exist in the Common Components version of Pagelet Wizard, will be copied back into the PeopleTools version when the UPGPT846PP conversion program is run.

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

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

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

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

PTPPB_EOPPB.DMS

To run the step automatically:

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

Properties

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

Task 1-39-4: Exporting Upgrade Setup Data

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

The script name for your upgrade path is:

PUEP88EXP.DMS

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

The DAT file name for your upgrade path is:

PUEP88EXP.DAT

Properties

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

Task 1-39-5: Dropping Indexes

Drop the following indexes using the SQL tool of your choice. These tables are changing key structure and data conversion cannot update the new columns if these old indexes exist.

- PSMAPRECFIELD.PSAPSMAPRECFIELD
- PSMAPROLEBIND.PSAPSMAPROLEBIND

Properties

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

Task 1-39-6: Editing the System Data Swap Script

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

To edit the swap script:

1. Find the line `SET BASE_LANGUAGE <NEW LANGUAGE_CD>`.
2. Change *NEW LANGUAGE_CD* to the language code on your Copy of Production.

The swap system data script for your path is:

DLEPLASWAP.DMS

Properties

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

Task 1-39-7: Editing the PeopleTools Swap Script

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

To do this, follow the edit instructions in the script.

The swap script for your upgrade path is:

PT_RELEASE_SWAP.DMS

Properties

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

Task 1-40: Backing Up After Prepare Your Database

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

Properties

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

CHAPTER 2

Apply PeopleTools Changes

This chapter discusses:

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

Understanding PeopleTools Changes

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

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

Task 2-1: Verifying Upgrade User

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

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

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

To grant your upgrade user PeopleSoft administrator privileges:

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

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

Properties

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

Task 2-2: Performing Script Modifications

This section discusses:

- Understanding Script Modifications

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

Understanding Script Modifications

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

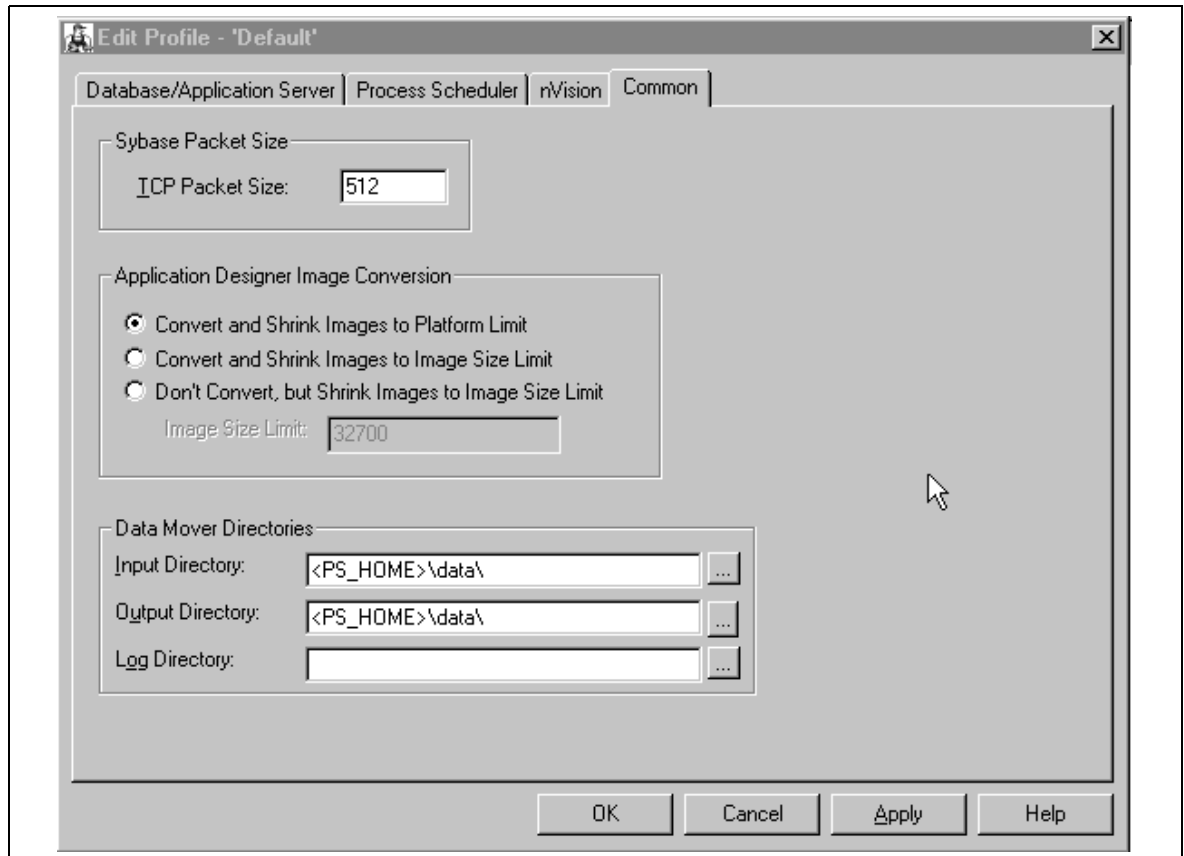
Note. Move to Production: These steps will be repeated in the Move to Production (MTP) pass. The script you previously edited may be acceptable, or you may need to change it again if your New Copy of Production has a different security or data definition language (DDL) configuration.

Task 2-2-1: Update Configuration Manager Profile

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

To update the profile:

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



Edit Profile - Default dialog box

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

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

Properties

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

Task 2-2-2: Run a DBTSFIX Report

The DBTSFIX.SQR script aligns the tablespaces in the delivered release scripts with the Target database used during the upgrade. This process generates new release scripts, conforming to the RELxxxDBTSFIX.SQL naming convention that you run in a later task. Run this script to preserve your existing table-to-tablespace mapping in the Target database. The result of this task will be a RELxxxDBTSFIX.SQL script in which xxx represents a release number (for example, 800, 810, 811, 812, and so on) associated with your particular path.

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

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

Properties

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

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

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

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

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

Properties

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

Task 2-2-4: Edit the GRANT Script

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

Properties

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

Task 2-2-5: Edit the PSLANGUAGES Script

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

Properties

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

Task 2-2-6: Edit the TLSUPGNONCOMP Script

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

Properties

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

Task 2-2-7: Edit the PTxxxTLS Scripts

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

To edit the PTxxxTLS scripts:

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

```
PTxxxTLS.DMS
PTxxxTLSyty.DMS
```

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

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

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

Properties

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

Task 2-2-8: Edit the DB2 Scripts

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

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

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

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

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

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

```
DB2TMPIDXCREATE.SQL
DLUPX02I.DMS
DLUPX13I.DMS
DLUPX14I.DMS
DLUPX96I.DMS
PT_RELEASE_IMPORT.DMS
DLEPSYSI.DMS
DLEPLASYSI.DMS
DLCGFAQ19I.DMS
DLCGGLU20I.DMS
DLCGUPY39I.DMS
DLCGUPY41I.DMS
```

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

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

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

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

- Run the UPG_CF_CONFIG Script (in the task Configuring ChartFields)
When you get to this step, edit the script UPG_CF_CONFIG.SQL
- Run the UPG_CF_RENAME Script (in the task Configuring ChartFields)
When you get to this step, edit the script UPG_CF_RENAME.SQL
- Run the Create Upgrade Tables Script (in the task Modifying the Database Structure)
When you get to this step, edit the script UPGCONVERT_CRTTBL.SQL

Properties

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

Task 2-2-9: Edit Move to Production Import Scripts

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

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

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

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

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

```
MVAPPIMP.DMS
MVPRDIMP.DMS
MVCGFAU25I.DMS
MVEP88IMP.DMS
```


MVCGUPY27I.DMS

If you prefer, you can copy these overrides from the `xxDMODBO.DMS` script that was generated from DBSetup while installing your database. Make sure you remove the `SET NO RECORD` if you copy from the DBSetup generated file.

See the Enterprise PeopleTools PeopleBook: Data Management for your new release.

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

Properties

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

Task 2-2-10: Edit Move to Production Password

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

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

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

Properties

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

Task 2-2-11: Edit the DDLDB2 Script

Edit `PS_HOME\SCRIPTS\DDLDB2.DMS`. At the bottom of this script, you will see an insert into `PSDDLDEFPARMS`. This insert contains default information used when creating a table, an index, a unique index, or a tablespace. Verify with your database administrator that the last value for each row is appropriate for your environment by checking the values currently stored in your `PSDDLDEFPARMS` table. Otherwise, the values will be reset to the default values delivered by PeopleSoft in this script.

Properties

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

Task 2-2-12: Edit the DDLDBX Script

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

Properties

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

Task 2-2-13: Edit the DDLORA Script

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

Properties

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

Task 2-2-14: Edit the DDLIFX Script

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

Properties

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

Task 2-2-15: Edit the MSGTLSUPG Script

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

Properties

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

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

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

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

Properties

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

Task 2-2-17: Edit Multilingual Step Properties

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

Depending on which languages you license, you will need to complete the following instructions once or twice. If you license any of these languages, Arabic, Czech, Danish, Finnish, French, Hebrew, Hungarian, Norwegian, Polish, Russian, or Turkish, perform the following instructions for the step “Export and Copy PPLTLSML Project.” If you license any of these languages, Canadian French, Dutch, German, Greek, Italian, Japanese, Korean, Malay, Portuguese, Simplified Chinese, Spanish, Swedish, Traditional Chinese, or Thai, perform the following instructions for the step “Export and Copy PPLTLS84CURML Project.”

To edit multilingual step properties:

1. In Change Assistant, select the step.
2. Open the Step Properties dialog box.
3. Click the Upgrade button, and then click the Options button.
4. On the Copy Options tab, deselect any languages that you do not license.
Common and English should remain deselected.
5. Click OK three times.
6. Save the template in Change Assistant.

See Export and Copy PPLTLS84CURML Project.

See Export and Copy PPLTLSML Project.

Properties

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

Task 2-2-18: Edit Data Type Steps

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

To set the Data Conversion steps as complete:

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

See Converting Database Data Types.

Properties

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

Task 2-3: Updating PeopleTools System Tables

This section discusses:

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

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

Understanding Updating PeopleTools System Tables

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

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

Task 2-3-1: Clean Up Message Data

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

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

1. Search for the string “--- End of PT8.xx ---” in which xx represents the last two digits of the PeopleTools release you are upgrading from.
2. Delete the entire portion of the script below this string.
3. Save the script as PS_HOME\SCRIPTS\PTUPGIBDEL8xx.SQL in which xx represents the last two digits of the PeopleTools release you are upgrading from, as determined in Step 1.

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

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

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

Properties

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

Task 2-3-2: Update System Catalog Views

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

Properties

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

Task 2-3-3: Update PeopleTools System Tables

Release scripts are SQL scripts that modify the underlying table structure of a database so that it is compatible with a more recent PeopleTools release. They are located in the PS_HOME\SCRIPTS directory. Release scripts can be identified by their common naming standard, RELxxx.SQL, in which xxx designates a PeopleTools release number.

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

If you created RELxxxDBTSFIX (in which xxx is a PeopleTools release) earlier in your upgrade, the procedure will look at your Output folder and will know to run RELxxxDBTSFIX. If you did not run DBTSFIX, Change Assistant will run RELxxx.

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

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

Properties

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

Task 2-3-4: Grant Privileges to the CONNECT ID

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

Properties

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

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

This section discusses:

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

Understanding the Product License Code

The new PeopleSoft release stores your application product license code on the database. This code is used to unlock the pages and Application Engine programs that you licensed. It also provides necessary product information about your database to be used for identifying software maintenance that may need to be applied.

You need to populate the databases that were upgraded to the new PeopleSoft release so that you have the correct access to Pages and Application Engine programs that you licensed.

When your new PeopleSoft databases were installed, the appropriate application license code was added to your database in the PSOPTIONS table. This was done in an update statement that was created when DBSETUP was run to create the Data Mover script for the new PeopleSoft release. The location of this script is:

`PS_HOME\SCRIPTS\DBnamedDBplatform.DMS`

DBname is the name of the Demo database you installed and *DBplatform* represents the database platform using the following chart:

Database Platform	Code Used
Microsoft SQL Server	MSS
DB2 UDB z/OS	DB2
DB2 UDB UNIX/NT	DBX
Oracle	ORA
Informix	INF
Sybase	SYB

Updating the Product License Code

Follow the steps below to update your product license code.

To update the product license code:

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

The statement should look similar to this:

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

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

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

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

Properties

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

Task 2-3-6: Update PeopleTools Patch Information

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

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

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

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

Properties

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

Task 2-3-7: Create Temporary Performance Indexes

Perform this step only if you are running on a DB2 z/OS platform. This step runs the DB2TMPIDXCREATE script to create multiple indexes for rename performance. You will drop these indexes later in the upgrade process.

Properties

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

Task 2-3-8: Export PeopleTools System Tables

The script for this step exports the content of the PeopleTools tables from the Copy of Production database during your Move to Production passes. During the initial pass, you run programs to convert some objects, like PeopleCode and Fields. You perform analysis to decide which objects, such as records and menus, to bring over to your production database and which customized objects to keep. At the end of the initial pass, you reapply customizations or make other changes, such as modifying your permission lists. You do not need to repeat those tasks in the Move to Production pass because this script exports all your changes to the PeopleTools objects.

The script name for your upgrade path is:

MVPRDEXP.DMS

Properties

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

Task 2-3-9: Import PeopleTools System Tables

The script for this step imports the content of the PeopleTools tables into your New Copy of Production database during your Move to Production passes.

These MVPRD* scripts replace tasks and steps performed in the initial pass. These tasks and steps may include:

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

If your relational database management system (RDBMS) uses tablespaces, edit this script for the proper DDL information.

The script name for your upgrade path is:

MVPRDIMP.DMS

Properties

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

Task 2-3-10: Reset Database Options Flag

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

Properties

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

Task 2-3-11: Rerun Update Statistics for DB2 z/OS

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

Properties

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

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

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

Properties

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

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

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

Properties

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

Task 2-3-14: Rerun Update Statistics for Informix

Earlier in the upgrade process, you updated your statistics for Informix. Due to changes in the database structure, you must update statistics again to improve the performance of your compare and copy. This step runs UPDATESTATS to update statistics on your database.

Properties

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

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

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

Properties

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

Task 2-4: Turning Off Change Control

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

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are only executed during the initial pass and the feature is only disabled for the initial pass.

See “Complete Database Changes,” Reviewing Change Control.

Properties

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

Task 2-5: Loading Model Definition Data

This section discusses:

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

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

Understanding Model Definition Data Load Process

In this task, you load model definition scripts for your database platform and populate DDL model definitions. This step runs the DDL model definition script applicable to your database platform. If required by your database platform, you modified this script in the task “Performing Script Modifications,” to use your site-specific information.

See Performing Script Modifications.

Task 2-5-1: Load Model Definitions for DB2 z/OS

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

Properties

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

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

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

Properties

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

Task 2-5-3: Load Model Definitions for Oracle

This step runs the DDLORA.DMS script to populate DDL model definitions for the Oracle platform.

Properties

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

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

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

Properties

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

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

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

Properties

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

Task 2-5-6: Load Model Definitions for Sybase

This step runs the DDLSYB.DMS script to populate DDL model definitions for the Sybase platform.

Properties

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

Task 2-6: Loading Message Data

This step loads system messages in the message catalog.

Properties

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

Task 2-7: Reviewing PeopleTools Objects

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

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

Warning! Do not change the delivered PeopleTools objects. The delivered objects are integral to the smooth operation of your system, and the modification of these objects could cause system instability.

When you perform the copy of the PeopleTools projects during the upgrade, you may overwrite modifications you have made. Excluding any PeopleTools-delivered objects from the upgrade may result in instability due to dependencies on specific objects.

To review PeopleTools objects:

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

When the progress dialog disappears, the project definition has been copied.

3. On your Source database, make a copy of the PPLTLS84CUR project and name it PPLTLS84CURCOMP. You will use this project for the compare process.
 - a. If the PPLTLS84CUR project is not open, open it now.
 - b. Select File, Save Project As...
 - c. Name the project PPLTLS84CURCOMP.
4. On your Source database, perform a project compare of the PPLTLS84CURCOMP project against your Target database.
 - a. If the PPLTLS84CURCOMP project is not open, open it now.
 - b. Select Tools, Compare and Report...
 - c. Sign on to the Target database.
 - d. Verify that all object types are selected.
 - e. Select Options...
 - f. On the Compare Options tab, select Compare Type of Project.
 - g. Select a value for Target Orientation.
 - h. For Comparison by Release, select the highest release in the list.
 - i. Under Compare Languages, select Common and English.

- j. If you have non-English languages loaded, select the other language(s) loaded into your database.
- k. Click the Report Filter tab and click Default.
This will cause only customizations to appear on the compare reports.
- l. Click OK.
- m. Click Compare to start the compare process.

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

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

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

Properties

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

Task 2-8: Exporting and Copying Projects

This section discusses:

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

Understanding Exporting and Copying Projects

In this task, you export and copy projects.

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

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

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

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

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

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. PeopleSoft delivers the PPLTLS84CUR project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following examples:

```
Changed Action from CopyProp to Copy, definition does not exist on target.
Definition Name: OBJECTNAME not copied, entire definition already copied.
```

These warnings occur because the PeopleTools project contains fields along with their field label. This is necessary so the software does not overwrite any customized field labels on PeopleSoft field objects.

Properties

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

Task 2-8-2: Export and Copy PPLTLS84CURML Project

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

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. PeopleSoft delivers the PPLTLS84CURML project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels. When the upgrade process detects that a given field does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following example:

```
Changed Action from CopyProp to Copy, definition does not exist on target.
Definition Name: OBJECTNAME not copied, entire definition already copied.
```

This warning occurs because the PeopleTools project contains fields along with their field label. This is necessary so the software does not overwrite any customized field labels on PeopleSoft field objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	Canadian French Dutch Greek German Italian Japanese Korean Portuguese Simplified Chinese Spanish Swedish Traditional Chinese Thai Malay

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

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

Before copying records and fields, the upgrade process detects whether the object definition exists. PeopleSoft delivers the PPLTLSML project with an Action of **CopyProp** to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following examples:

```
Changed Action from CopyProp to Copy, definition does not exist on target.
Definition Name: OBJECTNAME not copied, entire definition already copied.
```

These warnings occur because the PeopleTools project contains fields along with their field labels. This is necessary so PeopleSoft does not overwrite any customized field labels on PeopleSoft field objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	Arabic Czech Danish Finnish French Hebrew Hungarian Norwegian Polish Russian Turkish

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

This process deletes specified PeopleTools objects from your database.

Properties

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

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

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

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

Use Application Designer to perform the following steps.

To export and copy the project:

1. Log on to your Target database as a valid user.
2. Select Tools, Copy Project, From File...
3. In the Import Directory field, enter *PS_HOME\PROJECTS*.
4. Select the PATCH84X project from the list, in which 84X corresponds to the PeopleTools release of the patch project.

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

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

Properties

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

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

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

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

Use Application Designer to perform the following steps.

To export and copy the project:

1. Log on to your Target database as a valid user.
2. Select Tools, Copy Project, From File...
3. In the Import Directory field, enter *PS_HOME\PROJECTS*.
4. Select the PATCH84XML project from the list, where 84X represents the PeopleTools release of the patch project. This should correspond to the PeopleTools release to which you are upgrading.
5. Click Options, and then select the Copy Options tab and verify that only the non-English languages that are installed are selected.

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

6. Click OK.
7. Click Copy.

Properties

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

Task 2-9: Populating Tablespace Data

This section discusses:

- Create Application Tablespaces

- Populate Tablespace Data
- Update Tablespace Names

Task 2-9-1: Create Application Tablespaces

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

See “Apply Application Changes,” Updating Database Overrides.

See “Apply Application Changes,” Create New Tablespaces.

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

EPDDL.SQL (EPDDL.U.SQL for DB2 z/OS Unicode)

Important! For DB2 UNIX/NT sites, the script name is EPDDL.DMS.SQL for ANSI, and EPDDL.DMSU.SQL for Unicode.

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

To run the Create Application Tablespaces step automatically:

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

Properties

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

Task 2-9-2: Populate Tablespace Data

This step populates all tablespace information in the PSRECTBLSPC table. This step runs the SETSPACE.SQR script, which ensures that the correct tablespace information is populated for tasks later in the upgrade process.

The values stored in the DDLSPACENAME field are updated with current values found in the system catalog for tables already defined in your database. If you modified tablespace names from the PeopleSoft-delivered names, this step makes those same changes in the PeopleSoft record definition.

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

Properties

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

Task 2-9-3: Update Tablespace Names

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

- Generate the alter/create scripts and globally edit the scripts, changing the database/tablespace values to those of your Copy of Production.
- Directly update the PSRECTBLSPC table with your Target database names before generating the alter/create scripts. This will ensure that the database name/tablespace names in the generated alter/create scripts will be correct. The syntax to update the PSRECTBLSPC table is as follows:

```
UPDATE PSRECTBLSPC SET DBNAME = dbname, DDLSPACENAME = tablespace name WHERE⇒
DDLSPACENAME = tablespace identified in SETSPACE OUTPUT AND DBNAME = database⇒
identified in SETSPACE OUTPUT;
```

If you are using the PeopleSoft-delivered tablespaces, you can omit the references to DDLSPACENAME in the SQL statement above.

Properties

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

Task 2-10: Building Updated PeopleTools Project

This section discusses:

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

Task 2-10-1: Generate Updated PeopleTools Script

This step generates the SQL script to create and alter records of the type table that are delivered in the PPLTLS84CUR project. The tables are altered to add new columns, rename existing columns, and change columns that have modified properties, such as length, and delete columns. The script will also create new indexes, re-create modified indexes, and create triggers. The script name is:

PPLTLS84CURTABLES.SQL

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

Properties

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

Task 2-10-2: Edit the Updated PeopleTools Script

In this step, you edit the PPLTLS84CURTABLES.SQL script that was generated in the previous step for tablespace names and sizing. If you are running on a relational database management system (RDBMS) platform that uses tablespaces, and you are *not* using the PeopleSoft tablespace names, have your database administrator review this script and modify the tablespace names appropriately. The script can be found in your Change Assistant output directory for this upgrade path.

Properties

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

Task 2-10-3: Run the Updated PeopleTools Script

This step runs the script you generated in this task to create all records of the type table. This creates new table structures, alters existing PeopleSoft table structures, creates new indexes, re-creates modified indexes, and creates triggers.

Properties

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

Task 2-11: Migrating Records to New Tablespaces

This section discusses:

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

Understanding Migration of Records to New Tablespaces

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

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

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

Properties

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

Task 2-11-2: Build the Tablespace Alter Script

This step generates the SQL script to alter records of the type table that are delivered in the PT84TBLSPC project. The tables are altered to move them to the correct tablespaces for the new release of PeopleTools. The script name is:

TABLESPACEALERTABLES.SQL

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

Properties

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

Task 2-11-3: Edit the Tablespace Alter Script

In this step, you edit the TABLESPACEALERTABLES.SQL script for tablespace names and sizing. If you are running on an RDBMS platform that uses tablespaces, and you are *not* using the PeopleSoft tablespace names, you need to review and modify the scripts above. Have your database administrator review these scripts and modify the tablespace names appropriately. The script can be found in your Change Assistant output directory for this upgrade path.

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

Properties

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

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

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

Properties

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

Task 2-12: Loading Base Data

These Data Mover scripts (DMSs) initialize and modify the data in various PeopleTools tables required for the system to execute properly. This step runs scripts conforming to the PTxxxTLS.DMS and PTxxxTLYyy.DMS naming conventions, where xxx represents a PeopleTools release number and yyy represents a three-letter language code, that are greater than your current PeopleTools release. For some upgrades, no data scripts are required. In this case, Change Assistant continues to the next step without producing a log file.

Properties

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

Task 2-13: Loading Language Data

This section discusses:

- Populate Languages
- Load Language Data

Task 2-13-1: Populate Languages

This step runs the PSLANGUAGES.DMS script. This script populates the PSLANGUAGES table with Verity Locale data and other language-specific data.

Properties

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

Task 2-13-2: Load Language Data

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

To load language data:

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

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

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

Your database is now updated with the language data.

Properties

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

Task 2-14: Loading PeopleTools Data

This section discusses:

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

Task 2-14-1: Load NonComparable Objects

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

Properties

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

Task 2-14-2: Load English Messages

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

Properties

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

Task 2-14-3: Load English String Data

This step runs the PTSTRENG.DMS script, which loads English string data into the STRINGS_TBL table.

Note. The non-English language data was loaded in the task “Loading Base Data.”

Properties

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

Task 2-14-4: Load Stored Statements Data

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

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

Properties

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

Task 2-15: Loading PeopleTools Definition Group

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

Properties

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

Task 2-16: Converting PeopleTools Objects

This section discusses:

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

Task 2-16-1: Update REN Server Configuration

This step runs the Application Engine program UPGMCF843, which converts real-time event notification (REN) server configuration information to the new format. REN servers run in the application server domain. They are used for the PeopleTools MultiChannel Framework (MCF) and Reporting Window output option. The program converts standard REN server configurations to the new format, including MCF cluster information. All REN server configuration information is now stored within the database. You must upgrade old REN server configurations before attempting to boot with the new version of PeopleTools. If you did not have any REN servers configured prior to starting the upgrade, then the UPGMCF843 program does not make any changes. If one of your configurations cannot be converted, error messages will be written in the Application Engine message log.

After running this step, you should also check the PSRENCONFIG.TXT file located in each application server domain that started an old REN server. (The file will not exist in domains that did not start a REN server.) Each old file should be replaced with the new template file located at PS_HOME/APPSEV/REN/PSRENCONFIG.TXT. Old template files cannot be used with the new version of REN server. If you customized your old configuration files, manually edit the new files and update them with your customizations.

Properties

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

Task 2-16-2: Populate MCF Data

This step runs the Application Engine program MCF_UPGR_SND, which populates the PS_MCFEM_MAIL_DSCR table with data. In PeopleTools 8.44, the REPLY_TO header functionality was added. The field PS_MCFEM_MAIL_DSCR.MCF_REPLY_TO is populated with the values stored in PS_MCFEM_MAIL_MAIN.MCF_EMAIL_SENDER.

Properties

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

Task 2-16-3: Convert Portal Objects

This step runs the Application Engine program UPG844PORTAL, which splits PSPRSMDEFN.PORTAL_URLTEXT into segments and stores them in separate columns: PORTAL_URI_SEG1, PORTAL_URI_SEG2, PORTAL_URI_SEG3, and PORTAL_URI_SEG4. This is performed for PeopleSoft Component URLs to extract values for Menu, Component, and Market. Values for Record, Field, Event, and Function Names are extracted from Iscript URLs.

You may see some errors or messages in your log. Following is a list of some of the errors and what to do about them:

- Not authorized CRef: *Portal Object Name* (95,5032).

This means that you do not have proper privileges to run this conversion. You need to grant the user ID that you are using to upgrade Portal Administrator permissions.

- Security synchronization failed for Portal Object: *Portal Object Name* (96,61).

This is not a fatal error. It may be caused by a content reference that contains invalid URL text and indicates that there was an internal error writing to the security table. The invalid URL text may be pointing to a component or script that does not exist in the database. You need to fix the content reference and then rerun the UPG844PORTAL process.

- Cref *Portal Object Name* points to Menu: *Menu Name*, Component *Component Name* which doesn't exist. (96,80).

The content reference is pointing to an invalid Menu/Component combination. You need to fix the content reference so that it points at a valid Menu/Component combination and then rerun the UPG844PORTAL process.

- Duplicate key. Portal: *Portal Name*, Obj Name: *Portal Object Name*, Nodename: *Node*, URL: *URL* (133,4).

This Portal object has the same URL as another Portal object. Delete or modify this object to remove the conflict and then rerun the UPG844PORTAL process.

See the Enterprise PeopleTools PeopleBook: Internet Technology for your new release.

Properties

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

Task 2-16-4: Convert Query Prompt Headings

This step runs the Application Engine program UPGQRYDUPHED, which searches for duplicate prompt headings in the table PSQRYBIND and appends numbers onto the text. For example, *Item ID* would become *Item ID 2*. When you run Crystal 9 through the process scheduler, it cannot handle queries with two or more prompts that have the same heading. These duplicates are also not legal in Query. You need to alter any old queries that have duplicate prompt headings so that they work with Crystal 9.

If you find a duplicate heading that exceeds the length of the field HEADING, you need to manually change the heading. In these cases, the following error is written to the log file:

```
The prompt heading HEADING for Query QUERY is duplicated. Please manually correct.⇒
(108, 1108)
```

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

Properties

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

Task 2-16-5: Encrypt Connector Passwords

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

Properties

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

Task 2-16-6: Load Conversion Data

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

Properties

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

Task 2-16-7: Report Conversion Details

This step runs the PTUCONV.SQR script. It details which sections will be called by the Upgrade Driver program and what they are doing. Each of the upgrade data conversion sections contains comments that describe the processing done by the section. The information contained in the report is used to evaluate the conversions run in the next step and any actions that are required as a result of the conversion.

Properties

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

Task 2-16-8: Run Data Conversion

The Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with the group number of 01 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. After running PTUPGCONVERT, review the output data generated in the previous step for more details.

Properties

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

Task 2-17: Creating PeopleTools Views

This section discusses:

- Create Updated PeopleTools Views

Task 2-17-1: Create Updated PeopleTools Views

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

Properties

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

Task 2-18: Converting Integration Broker

This section discusses:

- Understanding Converting Integration Broker
- Updating Integration Broker Defaults

- Creating Integration Broker Objects
- Saving Application Messaging Objects
- Exporting Node Transactions
- Preparing Integration Broker Deletes
- Deleting Application Messaging Objects
- Deleting Node Transactions

Understanding Converting Integration Broker

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

Task 2-18-1: Updating Integration Broker Defaults

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

Properties

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

Task 2-18-2: Creating Integration Broker Objects

The PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with a group number of 03 and ordering them by the row sequence number. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the sequence number order. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

Properties

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

Task 2-18-3: Saving Application Messaging Objects

This step copies the PTUPGIBCLONE project to the *PS_HOME*projects directory. This project was created by the UPGPT848IBUG Application Engine program and contains objects that were successfully converted. The objects are copied to file as a precautionary measure since they will be deleted from the upgrade database.

After running this step, save the exported project in a permanent location where it can be accessed post-upgrade in case there is a need to review or import the old objects.

Properties

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

Task 2-18-4: Exporting Node Transactions

This step runs PTUPG_TRX_EXPORT.DMS to save out the old pre-conversion node transaction data. The generated .dat file is written to the DataMover output directory defined in Configuration Manager, which should be your *PS_HOME\data* directory.

After running this step, save PTUPG_TRX_EXPORT.DAT in a permanent location where it can be accessed post-upgrade in case there is a need to review or import the old objects.

Properties

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

Task 2-18-5: Preparing Integration Broker Deletes

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

Properties

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

Task 2-18-6: Deleting Application Messaging Objects

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

Properties

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

Task 2-18-7: Deleting Node Transactions

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

Properties

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

Task 2-19: Setting Object Version Numbers

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

Note. You will rerun the VERSION application engine program later in the upgrade. If you wish to preserve the log files generated by Change Assistant from this run, you will need to manually rename the files after completing this task.

Properties

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

Task 2-20: Converting Database Data Types

This section discusses:

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

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

Understanding Converting Database Data Types

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

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

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

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

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

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

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

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

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

The following command updates the statistics on the database catalog:

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

Properties

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

Task 2-20-2: Running Long Data Audit

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

Properties

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

Task 2-20-3: Validating Microsoft Database

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

Properties

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

Task 2-20-4: Reviewing Microsoft Settings

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

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

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

Note. During Move to Production passes, copy MSSNEWTYPE_ALTER.SQL from your initial pass upgrade's output directory and place it into the output directory for your Move to Production pass. This script is only generated during the initial pass. Edit the script and correct the database name on the first line of the script to point to the Target database for the pass.

Properties

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

Task 2-20-5: Creating Microsoft Conversion Project

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

Properties

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

Task 2-20-6: Generating Microsoft Conversion Script

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

Properties

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

Task 2-20-7: Running Microsoft Conversion Script

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

Properties

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

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

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

Properties

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

Task 2-20-9: Running Microsoft Conversion Report

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

Properties

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

Task 2-20-10: Validating Oracle Database

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

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

Properties

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

Task 2-20-11: Creating Oracle Audit Tables

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

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

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

Properties

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

Task 2-20-12: Auditing Duplicate Length Constraints

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

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

Properties

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

Task 2-20-13: Auditing Disabled Constraints

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

Properties

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

Task 2-20-14: Reviewing Oracle Settings

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

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

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

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

Properties

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

Task 2-20-15: Generating Oracle Conversion Scripts

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

1. Set the following init.ora parameters:

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

Note. If you are using Oracle 10g or higher, you may use the parameters `SGA_TARGET=300M` and `SGA_MAXSIZE=350M` instead of `SHARED_POOL_SIZE`, `DB_CACHE_SIZE`, and `DB_BLOCK_BUFFERS`.

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure you have at least six redo logs sized at 500 MB each.

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

```
echo %ORACLE_HOME%;
```

This should return a path, for example:

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

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

```
SET ORACLE_HOME=Oracle_Home_location
```

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

- **THREADS** – The number of Java threads the conversion script generation spawns to generate the scripts. We recommend 10 threads for running this program on Windows.
- **ACCESSID** – The access ID for the database to be converted.
- **ACCESSIDPW** – The access password for the database to be converted.

- **DBNAME** – The database name.
- **OUTPUTDIR** – A directory path to redirect the generated conversion scripts to a user specified directory. This must be set to the Change Assistant output directory for your upgrade pass. Change Assistant will run the generated scripts later in the upgrade.

Example:

```
PS_HOME\utility\PSORADDataTypesConversion.bat 10 SYSADM SYSADM MYDB c:\upgrade⇒
\output\Change_Assistant_job_directory
```

In the example command line above:

THREADS = 10

ACCESSID = SYSADM

ACCESSIDPW = SYSADM

DBNAME = MYDB

OUTPUTDIR = c:\upgrade\output\Change_Assistant_job_directory

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

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

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

This step runs LONGTOLOBALTER3.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-19: Running Long to LOB Script 4

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

This step runs LONGTOLOBALTER7.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-23: Running Long to LOB Script 8

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

This step runs CHARACTERLENGTHSEMANTICSALTER2.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-27: Running Character Length Script 3

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

Properties

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

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

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

Properties

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

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

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

Properties

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

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

This step runs CHARACTERLENGTHSEMANTICSALTER6.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 2-20-31: Running Character Length Script 7

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

Properties

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

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

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

Properties

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

Task 2-20-33: Auditing Character Length Semantics

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

Properties

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

Task 2-20-34: Reviewing Conversion Reports

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

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

To review the conversion reports for Oracle, examine the log files from running the LONGTOLOBALTER*.SQL scripts. If the database is Unicode, also examine the log files for the CHARACTERLENGTHSEMANTICS*.SQL scripts. Review the output from the step “Auditing Long to LOB Conversion.” L2LAUDIT.SQR reports on any unconverted long raw columns. The tablename, columnname, and column data type are listed. For unicode databases, review the output from the step “Auditing Character Length Semantics.” CLSAUDIT.SQR reports on any unconverted character length columns (Unicode only). Correct any errors listed on the log files or conversion reports before proceeding with the upgrade.

Properties

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

Task 2-20-35: Updating Database Options

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

Properties

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

Task 2-21: Backing Up After PeopleTools Upgrade

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

Properties

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

CHAPTER 3

Run and Review Compare Reports

This chapter discusses:

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

Understanding Compare Reports

Now that your Copy of Production database is at the same PeopleTools release as your new release, you can compare the two databases to see the differences. In this chapter you run and review compare reports to make decisions regarding your upgrade. Be sure you have plenty of space to run these reports, as some can be rather large.

Task 3-1: Preparing for Application Changes

This section discusses:

- Exporting Project Definitions
- Importing Project Definitions
- Dropping Tables and Views

Task 3-1-1: Exporting Project Definitions

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

The script for your upgrade is:

```
DLUPX08E.DMS
```

Properties

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

Task 3-1-2: Importing Project Definitions

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

The script for your upgrade is:

```
DLUPX08I.DMS
```

Properties

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

Task 3-1-3: Dropping Tables and Views

This step will drop tables, views or both, on the Copy of Production database. Some tables and views need to be dropped from the database prior to compare, copy, or generating DDL scripts. Some common reasons include:

- When a record was a view in a prior release and will be a table in the new release, the view must be dropped before the new tables are created.
- Records used as Application Engine state records for upgrade conversion code must exist on the database as an exact version of the record definition. You do not want these tables to be altered without deleting the obsolete columns. To make that happen, drop the table on the database at this point in the upgrade.
- Some records that have many fields and long row lengths will exceed database limitations if they are altered without deleting obsolete columns. If the table is considered a "temporary" table for batch processing, PeopleSoft assumes it will contain no relevant data at this point in the upgrade process. Dropping the table at this point in the upgrade will eliminate the row length problems that could occur later in the upgrade.

If for some reason any of these tables or views do not exist in your database, and you receive SQL errors, it is OK and you can proceed with your upgrade.

The script name for your upgrade path is:

```
DLEPUPM07.DMS
```

Properties

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

Task 3-2: Renaming Tables

This section discusses:

- Understanding Renamed Tables
- Running the RNEPUPM01MSS Script
- Running the RNEPUPM01DB2 Script
- Running the RNEPUPM02DB2 Script
- Running the RNEPUPM01DBX Script
- Running the RNEPUPM02DBX Script
- Running the RNEPUPM01IFX Script
- Running the RNEPUPM01ORA Script
- Running the RNEPUPM01SYB Script
- Running the RNEPPLM01MSS Script
- Running the RNEPPLM01DB2 Script
- Running the RNEPPLM02DB2 Script
- Running the RNEPPLM01DBX Script
- Running the RNEPPLM02DBX Script
- Running the RNEPPLM01ORA Script
- Running the RNEPPLM01IFX Script
- Running the RNEPPLM01SYB Script

Understanding Renamed Tables

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

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

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

Task 3-2-1: Running the RNEPUPM01MSS Script

RNEPUPM01MSS.SQL will rename tables on the Copy of Production database. This script is for SQLServer databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-2: Running the RNEPUPM01DB2 Script

RNEPUPM01DB2.SQL will drop the views related to the tables being renamed on the Copy of Production database. This script is for DB2 z/OS databases and will run in the initial and Move to Production passes.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Properties

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

Task 3-2-3: Running the RNEPUPM02DB2 Script

RNEPUPM02DB2.SQL will rename tables on the Copy of Production database. This script is for DB2 z/OS databases and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-4: Running the RNEPUPM01DBX Script

RNEPUPM01DBX.SQL will drop views related to the tables being renamed on the Copy of Production database. This script is for DB2 UDB databases on UNIX, Linux, or Windows and will run in the initial and Move to Production passes.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Properties

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

Task 3-2-5: Running the RNEPUPM02DBX Script

RNEPUPM02DBX.SQL will rename tables on the Copy of Production database. This script is for DB2 UDB databases on UNIX, Linux, or Windows and will run in the initial and Move to Production passes.

Properties

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

Task 3-2-6: Running the RNEPUPM01IFX Script

RNEPUPM01IFX.SQL will rename tables on the Copy of Production database. This script is for Informix databases and will run in initial and Move to Production passes.

Properties

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

Task 3-2-7: Running the RNEPUPM01ORA Script

RNEPUPM01ORA.SQL will rename tables on the Copy of Production database. This script is for Oracle databases and will run in initial and Move to Production passes.

Properties

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

Task 3-2-8: Running the RNEPUPM01SYB Script

RNEPUPM01SYB.SQL will rename tables on the Copy of Production database. This script is for Sybase databases and will run in initial and move to production passes.

Properties

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

Task 3-2-9: Running the RNEPPLM01MSS Script

This section discusses:

- Understanding RNEPPLM01MSS
- Running the RNEPPLM01MSS Script Automatically
- Skipping the RNEPPLM01MSS Step

Understanding RNEPPLM01MSS

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM01MSS Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM01MSS Step” for instructions on how to mark this task complete. RNEPPLM01MSS.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01MSS Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01MSS Script” can run automatically.

To run the RNEPPLM01MSS script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01MSS Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01MSS Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure below to update your job so that “Running the RNEPPLJ01MSS Script” will not be run.

To skip the RNEPPLM01MSS step:

1. In Change Assistant, select the step Running the RNEPPLM01MSS Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-10: Running the RNEPPLM01DB2 Script

This section discusses:

- Understanding RNEPPLM01DB2
- Running the RNEPPLM01DB2 Script Automatically
- Skipping the RNEPPLM01DB2 Step

Understanding RNEPPLM01DB2

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM01DB2 Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM01DB2 Step” for instructions on how to mark this task complete. RNEPPLM01DB2.SQL will drop the views related to the tables being renamed on the Copy of Production database.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Running the RNEPPLM01DB2 Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01DB2 Script” can run automatically.

To run the RNEPPLM01DB2 script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01DB2 Script
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01DB2 Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure below to update your job so that “Running the RNEPPLJ01DB2 Script” will not be run.

To skip the RNEPPLM01DB2 step:

1. In Change Assistant, select the step Running the RNEPPLM01DB2 Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-11: Running the RNEPPLM02DB2 Script

This section discusses:

- Understanding RNEPPLM02DB2
- Running the RNEPPLM02DB2 Script Automatically
- Skipping the RNEPPLM02DB2 Step

Understanding RNEPPLM02DB2

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM02DB2 Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM02DB2 Step” for instructions on how to mark this task complete. RNEPPLM02DB2.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM02DB2 Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM02DB2 Script” can run automatically.

To run the RNEPPLM02DB2 script automatically:

1. In Change Assistant, select the step Running the RNEPPLM02DB2 Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02DB2 Step

If you are upgrading from 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that “Running the RNEPPLJ021DB2 Script” will not be run.

To skip the RNEPPLM02DB2 step:

1. In Change Assistant, select the step Running the RNEPPLM02DB2 Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-12: Running the RNEPPLM01DBX Script

This section discusses:

- Understanding RNEPPLM01DBX
- Running the RNEPPLM01DBX Script Automatically
- Skipping the RNEPPLM01DBX Step

Understanding RNEPPLM01DBX

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM01DBX Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM01DBX Step” for instructions on how to mark this task complete. RNEPPLM01DBX.SQL will drop the views related to the tables being renamed on the Copy of Production database.

Note. You may encounter errors in this script due to applied product incidents or customizations. For example you may get an error because this script tries to drop a view that you do not have but is part of available maintenance. Ignore these errors and proceed with the upgrade.

Running the RNEPPLM01DBX Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01DBX Script” can run automatically.

To run the RNEPPLM01DBX script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01DBX Script
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM01DBX Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that “Running the RNEPPLJ01DBX Script” will not be run.

To skip the RNEPPLM01DBX step:

1. In Change Assistant, select the step Running the RNEPPLM01DBX Script.

2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-13: Running the RNEPPLM02DBX Script

This section discusses:

- Understanding RNEPPLM02DBX
- Running the RNEPPLM02DBX Script Automatically
- Skipping the RNEPPLM02DBX Step

Understanding RNEPPLM02DBX

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM02DBX Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM02DBX Step” for instructions on how to mark this task complete. RNEPPLM02DBX.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM02DBX Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM02DBX Script” can run automatically.

To run the RNEPPLM02DBX script automatically:

1. In Change Assistant, select the step Running the RNEPPLM02DBX Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02DBX Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that “Running the RNEPPLJ021DBX Script” will not be run.

To skip the RNEPPLM02DBX step:

1. In Change Assistant, select the step Running the RNEPPLM02DBX Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-14: Running the RNEPPLM01ORA Script

This section discusses:

- Understanding RNEPPLM01ORA
- Running the RNEPPLM01ORA Script Automatically
- Skipping the RNEPPLM02ORA Step

Understanding RNEPPLM01ORA

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM02ORA Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM02ORA Step” for instructions on how to mark this task complete. RNEPPLM02ORA.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01ORA Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01ORA Script” can run automatically.

To run the RNEPPLM01ORA script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01ORA Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02ORA Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that “Running the RNEPPLJ021ORA Script” will not be run.

To skip the RNEPPLM02ORA step:

1. In Change Assistant, select the step Running the RNEPPLM02ORA Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-15: Running the RNEPPLM01IFX Script

This section discusses:

- Understanding RNEPPLM01IFX
- Running the RNEPPLM01IFX Script Automatically
- Skipping the RNEPPLM02IFX Step

Understanding RNEPPLM01IFX

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM02IFX Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM02IFX Step” for instructions on how to mark this task complete. RNEPPLM02IFX.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01IFX Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01IFX Script” can run automatically.

To run the RNEPPLM01IFX script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01IFX Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02IFX Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that “Running the RNEPPLJ021IFX Script” will not be run.

To skip the RNEPPLM02IFX step:

1. In Change Assistant, select the step Running the RNEPPLM02IFX Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-2-16: Running the RNEPPLM01SYB Script

This section discusses:

- Understanding RNEPPLM01SYB
- Running the RNEPPLM01SYB Script Automatically
- Skipping the RNEPPLM02SYB Step

Understanding RNEPPLM01SYB

If you are upgrading from PeopleSoft 8.80 and you applied the Supply Planning bolt-on or you are upgrading from PeopleSoft 8.8 SP1, proceed to “Running the RNEPPLM02SYB Script Automatically”. If you are upgrading from PeopleSoft 8.80 and are implementing the EPM Planning integration, proceed to “Skipping the RNEPPLM02SYB Step” for instructions on how to mark this task complete. RNEPPLM02SYB.SQL will rename tables on the Copy of Production database.

Running the RNEPPLM01SYB Script Automatically

Follow this procedure to edit your template so that “Running the RNEPPLM01SYB Script” can run automatically.

To run the RNEPPLM01SYB script automatically:

1. In Change Assistant, select the step Running the RNEPPLM01SYB Script.
2. Open the Step Properties dialog box.
3. Change the Type from *Manual - Stop* to *SQL Script*, and click OK.
4. Click OK.
5. Ensure the step is still highlighted and select Edit, Run (or F4).

Skipping the RNEPPLM02SYB Step

If you are upgrading from PeopleSoft 8.80 and implementing the EPM Planning integration, you do not need to run this script. Follow this procedure to update your job so that “Running the RNEPPLJ021SYB Script” will not be run.

To skip the RNEPPLM02SYB step:

1. In Change Assistant, select the step Running the RNEPPLM02SYB Script.
2. Select Edit, Complete (or F7).

Properties

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

Task 3-3: Copying Select Tables

This section discusses:

- Running the DLCGGLU20E Script
- Running the DLCGGLU20I Script

Task 3-3-1: Running the DLCGGLU20E Script

The DLCGGLU20E/I scripts save the contents of PSRECFIELDDB into a temporary table (PS_FS_UPG_RECFLDDB) to be used by data conversion programs. PSRECFIELDDB is a PeopleTools table that contains all Records and the fields on those records. Running the DLCGGLU20E script at this point in the upgrade will preserve the prior release record/field structure in the temporary table.

Note. Move to Production Note: The export can only run during the initial test pass. It is only during the initial pass that you have old release record structures in the new release PSRECFIELDDB table. You will need to preserve the .dat file DLCGGLU20.dat located in your PSHOME\DATA directory. It will need to exist in the PSHOME\DATA directory during your Move to Production Passes.

Properties

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

Task 3-3-2: Running the DLCGGLU20I Script

The DLCGGLU20I script imports the data into the PS_FS_UPG_RECFLDDB temporary table.

Note. Move to Production Note: The import needs to run in both initial and MTP passes. The export script, DLCGGLU20E script will only run in the initial test pass. This script requires the DLCGGLU20.dat file generated during the initial pass. The .DAT file should be located in your PSHOME\DATA directory.

Properties

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

Task 3-4: Running New Release Compare Reports

This section discusses:

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

Understanding the New Release Compare

In this task you will compare your customizations to the new release objects by running a project compare against the Demo database.

Task 3-4-1: Preserving Local Message Node

In this step add your Local Message Node to the UPGCUST project before the project compare between the Copy of Production and Demo database.

To add Local Message Node:

1. Run the following SQL in your Copy of Production database to identify your Local Message Node:


```
SELECT MSGNODENAME FROM PSMGNOEDEDEFN WHERE LOCALDEFAULTFLG = 'Y'
```
2. Open Application Designer from your Copy of Production database.
3. Open project UPGCUST.
4. Select Insert, Definitions Into Project.
5. Select Definition Type of Message Node.
6. Enter the Message Node name that was returned from the SQL you ran above.
7. Select the displayed Message Node.
8. Click Insert.
9. Save project UPGCUST.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-4-2: Modifying New Release Compare Options

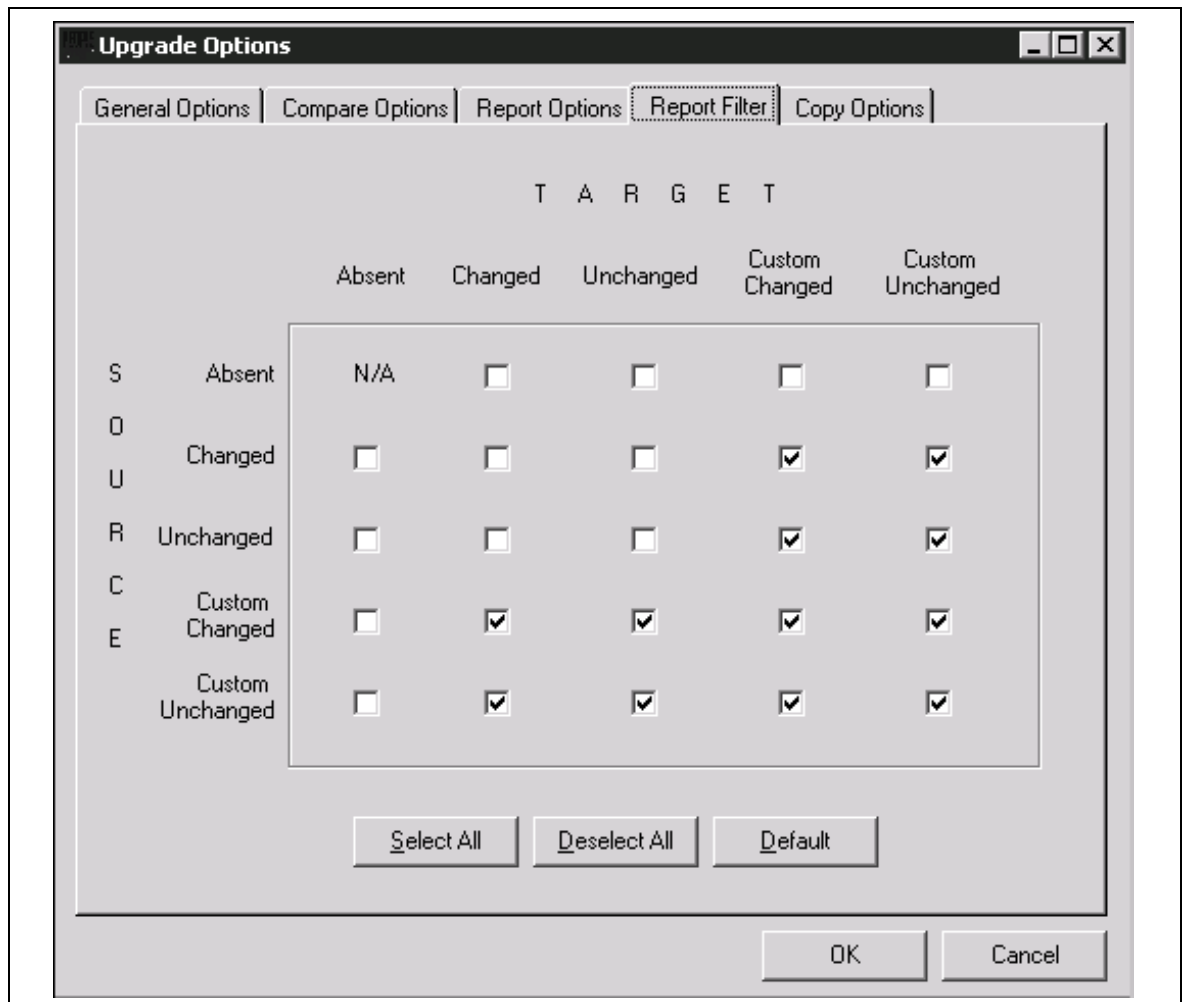
For compare steps, PeopleSoft Change Assistant templates are delivered with the default reports filter turned on in the compare options. This limits the size of the reports and keeps them manageable. Before you start the compares, review the Change Assistant template step properties for each compare step in this task and modify the compare options based on your requirements.

If you decide not to modify the compare options, the objects are still compared. However, the results are only available online in Application Designer. They are not written to the compare reports. The compare reports are tools to help you review changed objects. However, based on the report filters you select, you may need to review the action flags for other objects in the compare project in Application Designer.

For example, you can modify the compare options so the report contains customized objects that are present in your Copy of Production database but absent from the Demo database. Alternatively, you can review these objects online, through Application Designer, after the compare.

To modify upgrade compare options:

1. Highlight the compare step you want to review and right-click.
2. Select Step Properties.
The Step Properties dialog box appears.
3. Click Upgrade.
The Compare and Report dialog box appears.
4. Click Options.
5. Select the Report Filter tab.
The default options include your custom changes on the reports.
6. Change the default options as necessary and click OK.



Upgrade Options page, Report Filter tab

7. In the Compare and Report dialog box, click OK.
8. In the Step Definitions dialog box, click OK.
9. Repeat steps 1 through 8 for each compare step in the task you want to review and change.
10. Select File, Save Job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-4-3: Running New Release UPGCUST Compare

This step executes a project compare of all comparable objects in the UPGCUST project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 3-4-4: Running New Release UPGCUSTIB Compare

This step executes a database compare of all Integration Broker objects and generates the UPGCUSTIB project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 3-4-5: Resetting Take Action Flags in UPGCUST

This step turns *off* all Take Action flags in the UPGCUST project after the compare. You will analyze the compare results and adjust the upgrade flags in the next step.

The script for your upgrade is:

```
DLUPX98.DMS
```

See Appendix: “Using the Comparison Process.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-4-6: Running UPGCUSTIB Filter Script

This step removes all objects from the UPGCUSTIB project that are not marked **Changed* or **Unchanged* in your Copy of Production environment. It is used to isolate only custom objects in the UPGCUSTIB project.

The script name for your upgrade is:

```
DLUPX95.DMS
```

See Appendix: “Using the Comparison Process.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-4-7: Resetting Flags for ChartField Objects

This step turns Take Action flags on in the UPGCUST project for objects modified by the ChartField Configuration process. If you have added a new ChartField, you need to review and adjust the flags for all the new objects you have created to support the new ChartField, such as records, views, pages, and components. The script below sets the flag for most of those objects, but you may have used a different name than expected. If you have not added a new ChartField, but have relabeled, resized, renamed, or activated/inactivated a delivered ChartField, the script below will include all those objects and no additional action is required.

The script for your upgrade is:

```
DLEPFAU01.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-5: Reviewing New Release Compare Reports

This section discusses:

- Reviewing New Release Changes
- Reviewing NonComparable Objects

Task 3-5-1: Reviewing New Release Changes

In this step, review the UPGCUST and UPGCUSTIB projects to evaluate how changes in the new release affect your customizations.

The UPGCUST and UPGCUSTIB projects exist in your Copy of Production database and contain all the objects you customized in the old release. These projects may include object definitions that are on your Copy of Production database but are not on the Copy of Current Demo database. If these are custom objects that you intend to keep in your upgraded system, you will want to ensure they are set to copy in the UPGCUST or UPGCUSTIB project. Compare reports are viewable when you open the projects in Application Designer. You can use these reports to determine your copy action for each object in the projects. Currently all Upgrade Flags are deselected, meaning no action will take place. Analyze the UPGCUST and UPGCUSTIB projects and select the Upgrade Flags for the customizations you wish to retain.

If the Target column has the value *Absent* it can indicate one of two possible conditions. If PeopleSoft originally delivered the object definition, then it can be considered obsolete in the new release. This value can also indicate that you originally created the object definition for some custom functionality. To ensure the integrity and functionality of the system, delete obsolete PeopleSoft-delivered objects. If you have made a customization to an obsolete object, refer to the product's Release Notes to assess the functionality of the customization and determine where to reapply it in the new release.

See Appendix: "Using the Comparison Process."

Warning! Pay close attention to the compare results for URLs, permission lists, and message nodes. It is highly likely that you will want to keep any customizations that you have made to these objects. You will want to migrate your customized local message node. Please be sure to select the Upgrade Flags from within Application Designer to retain these customizations.

Note. Steps in the database and/or third-party software installation documentation can result in PeopleSoft-delivered objects being identified in the compare reports as **Changed* in the Source column. You should investigate all instances where objects are identified as **Changed* in the Source column to determine their origin and determine a plan of action based on the findings for each object.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 3-5-2: Reviewing NonComparable Objects

The UPGNONCOMP project is delivered in your Demo database. It contains object definitions that cannot be compared using Application Designer. The UPGNONCOMP project for your upgrade may contain some or all objects of the following object types: trees, access groups, roles, dimensions, cube definitions, and cube instance definitions. These object definitions are required for your upgraded database to function correctly. You need to review this project to see whether you customized any of the objects. You then need to reapply those customizations later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

CHAPTER 4

Apply Application Changes

This chapter discusses:

- Understanding Application Changes
- Customizing the New Release
- Running New Release Upgrade Copy
- Updating Database Overrides
- Backing Up After the Upgrade Copy
- Configuring ChartFields
- Modifying Trigger Tables
- Modifying the Database Structure
- Loading Data for Data Conversion
- Restoring New Release Demo
- Applying Updates Before Data Conversion
- Configuring Scheduler and Server
- Backing Up Before Data Conversion
- Running Data Conversion
- Backing Up After Data Conversion
- Finalizing the Database Structure
- Loading Data to Complete System Setup
- Loading Stored Statements
- Updating Language Data
- Completing PeopleTools Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports

Understanding Application Changes

Earlier in the upgrade, you made various application changes. Now it is time to apply these application changes to your Copy of Production database.

Task 4-1: Customizing the New Release

This section discusses:

- Understanding New Release Customizations
- Copying the UPGCUST Project
- Reviewing Copy Results

Understanding New Release Customizations

In this task, the UPGCUST project is copied from the Copy of Production database to the Demo database.

Note. If you are running Sybase, check the configuration parameter for open objects. If this parameter is set too low, you may encounter the following error: `ct_connect(): network packet layer: internal net library error during the compare or copy process`. If you encounter this error, you need to increase the value of this parameter accordingly.

Task 4-1-1: Copying the UPGCUST Project

This step copies your customized PeopleTools and application objects from the Copy of Production database to your Demo database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-1-2: Reviewing Copy Results

Review the results of the project copies that were performed in this task. For each of the projects copied, review the copy logs for any errors. Also, verify in Application Designer that each of the projects copied shows the Done options are checked for those objects you expected to be copied.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. For example, if you chose not to copy a record definition, but neglected to clear the PeopleCode Upgrade check box for that record, you will receive errors when trying to copy the PeopleCode. Application Designer maintains PeopleTools integrity during the copy and will not copy PeopleCode for records that do not exist.

Review any errors you receive during the copy process and determine whether they are acceptable cases or unacceptable errors that need correction. In the example above, either the PeopleCode error is acceptable because you do not intend to copy the record definition, or the error is unacceptable and you should copy the record and then copy the PeopleCode for that record again.

You may get messages similar to “Warning: FIELDNAME is a key field and has been appended to the end of the RECORDNAME record.” This is an acceptable message and you can ignore it.

The following error occurs when copying a Portal Registry Structure that has a different PORTAL_OBJNAME but the same PORTAL_URLTEXT as an existing registry object.

Duplicate Key. Portal: *portalname*, Obj name: *objectname*, CP: *nodename*, URL (1st 50⇒ char): *URL*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2: Running New Release Upgrade Copy

This section discusses:

- Exporting Selected PeopleTools Tables
- Importing Selected PeopleTools Tables
- Copying the UPGCUSTIB Project
- Swapping PeopleTools Tables
- Creating the UPGIBCOPY Project
- Copying the UPGIBCOPY Project
- Updating Target Values
- Copying the UPGNONCOMP Project
- Reviewing Project Copy Results
- Exporting New Release Objects
- Importing New Release Objects
- Resetting Object Version Numbers
- Backing Up New Release Demo Again

Task 4-2-1: Exporting Selected PeopleTools Tables

Depending on your upgrade path you will need to export one or more PeopleTools tables to preserve values on your Copy of Production database. This step exports PeopleTools tables in the Copy of Production before the upgrade copy has occurred.

The script for your upgrade path is:

```
DLUPX96E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-2-2: Importing Selected PeopleTools Tables

Depending on your upgrade path you will need to import one or more PeopleTools tables to preserve values on your Copy of Production database. This step imports PeopleTools tables into the Demo database before the upgrade copy occurs.

The script for your upgrade path is:

```
DLUPX96I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2-3: Copying the UPGCUSTIB Project

This step copies your customized Integration Broker objects from the Copy of Production database to your Demo database.

See Customizing the New Release, Reviewing Copy Results.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2-4: Swapping PeopleTools Tables

This step swaps the base language for tables that contain PeopleTools Managed Object data and related language data on your Demo database. This is in preparation for the next step, “Exporting New Release Objects.” This script should only be run if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
PT_RELEASE_SWAP.DMS
```

If you would like to automate this step, follow the procedure below.

To make this step automated:

1. Select the step Swapping PeopleTools Tables in Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from ManualStop to DataMoverUser.

4. Click OK twice.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	Non-English Base Language

Task 4-2-5: Creating the UPGIBCOPY Project

In this step, you create the UPGIBCOPY project and use it to upgrade your Integration Broker objects to the new release.

To create the UPGIBCOPY project:

1. Launch PeopleTools and sign on to the New Release Demo database.
2. From Application Designer, select File, New...
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project...
5. Select *Messages* from the Object Type drop-down list box.
6. Click Insert, and then click Select All.
7. Click Insert.
8. Repeat steps 5, 6, and 7 for the following object types:
 - Services
 - Service Operations
 - Service Operation Handlers
 - Service Operating Versions
 - Service Operation Routings
 - IB Queues
9. Click Insert, and then click Close.
10. Select File, Save All.
11. Enter the project name UPGIBCOPY.

Warning! You must name the project UPGIBCOPY or the next step will fail.

12. Click OK.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2-6: Copying the UPGIBCOPY Project

In this step, copy all objects in the project, UPGIBCOPY. This project consists of PeopleSoft-delivered Integration Broker objects as well as any customizations you may have selected to copy to the New Release Demo in a previous step.

See Copying the UPGCUSTIB Project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-2-7: Updating Target Values

This step updates the Message Node table on the Demo database to keep the assignment of the Local Node defined in the Copy of Production. The update uses the copy of the Message Node table taken earlier in the upgrade.

The script for your upgrade path is:

```
DLUPX97.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2-8: Copying the UPGNONCOMP Project

In this step, copy the non-compare project, UPGNONCOMP. This project consists of object types you cannot compare and object types not included in your compare project. In a previous step, you reviewed this PeopleSoft-delivered project and modified the Upgrade check box for any objects you did not want to copy.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-2-9: Reviewing Project Copy Results

Review the results of the UPGCUSTIB, UPGIBCOPY, and UPGNONCOMP project copy steps that were performed earlier in this task. Review each copy log for any errors and verify in Application Designer that the Done options are checked for the objects in each of the projects. To verify Done options for UPGIBCOPY and UPGNONCOMP, you would log in to the Demo database, whereas to verify Done options for UPGCUSTIB, you would log in to your Copy of Production database.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. Review any errors you received during the copy process to determine whether they are acceptable cases or unacceptable errors that need corrective action.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2-10: Exporting New Release Objects

This step exports the new release objects and your customizations that you copied to the Demo database in an earlier step, to a file.

The script name for your upgrade path is:

`PT_RELEASE_EXPORT.DMS`

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-2-11: Importing New Release Objects

This step imports the new release objects and your customizations into your Copy of Production database.

The script name for your upgrade path is:

`PT_RELEASE_IMPORT.DMS`

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-2-12: Resetting Object Version Numbers

In this step, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Note. You will rerun the VERSION Application Engine program later in the upgrade. If you want to preserve the log files generated by Change Assistant from this run, you will need to manually rename the files after completing this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-2-13: Backing Up New Release Demo Again

Back up your New Release Demo database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remainder of the tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-3: Updating Database Overrides

This section discusses:

- Understanding Database Overrides
- Set Index Parameters After Copy
- Set Tablespace Names After Copy
- Set Record Parameters After Copy
- Create New Tablespaces

Understanding Database Overrides

In this task, you update PeopleTools tables with DDL information from your physical database DDL. You may have overwritten information about where tables exist in your database during the copy project steps of this upgrade. The following steps synchronize your PeopleTools table definitions with your database again.

In the new release, certain tables have moved from 4K to 32K page size tablespaces. Make sure these tables are created/alterd in the 32K tablespaces. See the reference below for a complete list of tables.

See Appendix, “Reviewing Tablespaces”

Task 4-3-1: Set Index Parameters After Copy

This step updates index overrides stored in the PSIDXDDLPRM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

SETINDEX.SQR

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	Oracle DB2 z/OS	All

Task 4-3-2: Set Tablespace Names After Copy

This step updates tablespace names stored in the PSRECTBLSPC table. In addition, the values stored in the DDLSPACENAME field are updated with current values found in the system catalog. If you modified tablespace names from the PeopleSoft-delivered names, this process makes those same changes in the PeopleSoft record definition. It also corrects any tablespace names that were reset with values from the Demo database during the copy project step. The process then lists any tablespaces defined in the PeopleTools tables that are not currently on your database. Use this report to create new tablespaces later in this task. The name of the process is:

SETSPACE.SQR

Note. This step updates both the database and tablespace names in the PSRECTBLSPC table for DB2 z/OS sites. The report produced by this process lists database/tablespace combinations that were not defined in the DB2 system catalog. The report may show your Demo database and tablespace names instead of your Copy of Production database and tablespace names. You will correct this situation when you create new tablespaces.

See Create New Tablespaces.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 4-3-3: Set Record Parameters After Copy

This step updates table overrides stored in the PSRECDDLPRM table. The values stored in the PARMVALUE field are updated with the current values found in the system catalog. The name of the process is:

SETTABLE.SQR

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	Oracle	All

Task 4-3-4: Create New Tablespaces

This section discusses:

- Prerequisites
- Creating PeopleSoft Delivered Tablespaces
- Creating Custom Tablespaces

Prerequisites

Before you perform this step, you must make sure your database administrator has created all new tablespaces that will be used in new tables.

Note. DB2 z/OS sites need to create databases as well as tablespaces at this time.

Creating PeopleSoft Delivered Tablespaces

If you use PeopleSoft-delivered tablespace names, be aware that there may be new ones in this release. The report that you produced when you set tablespace names after copying provides a list of tablespaces that are missing from your database.

See Set Tablespace Names After Copy.

You need to create all the tablespaces on the report listed as missing on the database. Once you create all the tablespaces, you can rerun the SETSPACE.SQR; the report should show that no additional modifications are needed.

Note. For DBX sites, create all the tablespaces on the report listed as missing on the database in addition to the corresponding index (IDX) tablespace.

PeopleSoft delivered a shell SQL script containing the DDL commands to create all the PeopleSoft-delivered tablespaces. Edit the script to create just the new tablespaces and to set up the script for your environment.

Note. PeopleSoft reassigned some tables to larger tablespaces because they now require a 32-KB buffer pool. You must manually edit the Create Table statements in the upgrade scripts to replace the tablespace names with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool.

The script name is:

EPDDL.SQL (EPDDL.U.SQL for DB2 z/OS Unicode)

Important! For DB2 UNIX/NT sites, the script name is EPDDL.DMS.SQL for ANSI, and EPDDL.DMSU.SQL for Unicode.

DB2 z/OS sites must also consider how database names are assigned. After the upgrade/copy is completed, some of the PeopleTools metadata tables in your Copy of Production database will contain the database values from the Demo database. Review the SETSPACE SQR report for those tables that are reported as not defined in the database. If the report shows your Demo database names instead of your Copy of Production database names you can reset them with the following SQL:

```
UPDATE PSRECTBLSPC SET DBNAME = 'Copy of Production dbname'
WHERE DBNAME = 'Demo dbname'
```

Creating Custom Tablespaces

If you will use custom tablespaces, create those tablespaces now. Choose one of the following two methods to get the information into PeopleTools:

- Update PeopleTools for each record you will put into a custom tablespace. You can do this directly through Application Designer, or you can update PSRECTBLSPC directly by using the appropriate SQL for your site, as follows:

DB2 z/OS sites:

```
UPDATE PSRECTBLSPC
SET DBNAME = 'new dbname', DDLSPACENAME = 'new tablespacename'
WHERE DBNAME = 'current dbname'
AND DDLSPACENAME = 'current tablespacename';
```

All other sites:

```
UPDATE PSRECTBLSPC
SET DDLSPACENAME = 'new tablespacename'
WHERE DDLSPACENAME = 'current tablespacename';
```

To update each table individually, add the following clause to the predicate of the above statement, making sure you use the record name in this clause:

```
AND RECNAME = record name
```

The SETSPACE report contains the table name. The record name will not have the “PS_” prefix.

You can double-check that you created all tablespaces by rerunning the SETSPACE.SQR report. If you created all tablespaces for records defined in PeopleTools, the report will be empty.

- When you edit the Create and Alter scripts, you can change the SQL to create the tables in the correct tablespaces. Later in this task you will set tablespace names, which will update PeopleTools with the correct tablespaces or database/tablespace in DB2 z/OS. The report should be empty at that time.

Note. For DB2 z/OS sites, the SETSPACE report may list some database/tablespace combinations as “Table Undefined - DB/TS OK” when in fact the database name is one that was defined for your Demo database. This occurs if your Demo and Copy of Production databases are in the same DB2 subsystem. The SETSPACE.SQR detected that the database/tablespace combinations do exist in the subsystem and are therefore valid. Make sure that you update these database/tablespace names to match those that exist in your Copy of Production, using the instructions above.

Note. During the Move to Production pass, you will create these tablespaces when you populate tablespace data. You can reuse this script, or you can create a new script for your production environment. To reuse the script you have created for this task, save it and copy it into the PS_HOME\SCRIPTS directory that you use during the Move to Production pass.

See the Enterprise PeopleTools Installation for DB2 UDB for z/OS for your new release, “Creating a Database,” Correcting Invalid Database/Tablespace Combinations.

See Modifying the Database Structure, Editing the Create and Alter Scripts.

See Modifying the Database Structure, Setting Tablespace Names.

See “Apply PeopleTools Changes,” Populating Tablespace Data.

See “Apply Changes to Production Database,” Performing the Move to Production.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	Oracle Informix DB2 z/OS DB2 UNIX/NT	All

Task 4-4: Backing Up After the Upgrade Copy

Back up your database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-5: Configuring ChartFields

This section discusses:

- Understanding ChartFields
- Updating Inactive ChartFields
- Copying UPG CF CONFIG Project Definition
- Building the UPG CF CONFIG Script
- Running the UPG CF CONFIG Script
- Copying UPG CF RENAME Project Definition
- Building the UPG CF RENAME Script

- Running the UPG CF RENAME Script
- Exporting Configuration Defaults
- Importing Configuration Defaults
- Running Configuration by Project Process
- Updating Asset Management ChartField SQC
- Exporting ChartField Configuration
- Importing ChartField Configuration

Understanding ChartFields

In this task you will apply your existing ChartField configuration to the new PeopleSoft objects that have been copied into your database. You will accomplish this by running the Configuration by Project process. The process will dynamically create the project UPG_CFDBCOMP containing the new objects, and use this project in running ChartField Configuration by Project.

Since this task simply applies your existing configuration actions with a Complete status to the new objects, you will also need to run the Full Configuration process after completing the upgrade in the following cases:

- You need to make changes to your current PeopleSoft ChartField configuration that did not exist in the previous release (for example, activate an additional ChartField, relabel a ChartField and so forth).
- You have licensed new products and you have not yet run the Full Configuration process to configure those products.

See *PeopleSoft Enterprise 9.0 Application Fundamentals PeopleBook* “Configuring ChartFields.”

Task 4-5-1: Updating Inactive ChartFields

This step updates the PSDBFIELD table to reflect which ChartFields were previously active or inactive in your Copy of Production database before the upgrade.

The script name is for your upgrade is:

DLEPFAU40.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-5-2: Copying UPG CF CONFIG Project Definition

This step copies the project definition from the Demo database to the Copy of Production database. This will only copy the project definition, not the objects in the project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5-3: Building the UPG CF CONFIG Script

This step generates the UPG_CF_CONFIG.SQL script that contains SQL to alter existing tables. This SQL will create and alter tables, and create views.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5-4: Running the UPG CF CONFIG Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5-5: Copying UPG CF RENAME Project Definition

This step copies the project definition from the Demo database to the Copy of Production database. This will only copy the project definition, not the objects in the project. This project contains records with the column FIELDNAME added in the new release to allow the CF Configuration process to do a Rename ChartField action.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5-6: Building the UPG CF RENAME Script

This step generates the UPG_CF_RENAME.SQL script that contains SQL to alter existing tables. This SQL will create and alter tables, and create views.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5-7: Running the UPG CF RENAME Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-5-8: Exporting Configuration Defaults

This script exports ChartField configuration data from the Demo database. This data is considered system data needed for the ChartField configuration steps that follow. The script name for your upgrade path is:

DLCGFAQ19E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-5-9: Importing Configuration Defaults

This script imports the ChartField configuration data into the Copy of Production database. The script name for your upgrade path is:

DLCGFAQ19I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-5-10: Running Configuration by Project Process

This step runs the AE process UPG_CFCONFIG. This process applies all existing ChartField configuration actions on table FS_CF_ACT_LOG with a CF_STATUS of C (Complete) to the objects in project UPG_CFDBCOMP. Project UPG_CFDBCOMP is created by the process and contains records from the upgrade compare project UPGDBCOMP1 and pages from the upgrade compare project UPGDBCOMP2.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-5-11: Updating Asset Management ChartField SQC

This step runs the SQR AMCFBULD, which updates the file AMCHARTS.SQC. Once the process completes successfully, you will find a new AMCHARTS.SQC in your TEMP directory. Move AMCHARTS.SQC into your production SQR directory.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Asset Management	All	All

Task 4-5-12: Exporting ChartField Configuration

To avoid running the ChartField Configuration process again in the Move to Production passes, this step exports the data updated by this process from your first Copy of Production database. The script name for your path is:

MVCGFAU25E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 4-5-13: Importing ChartField Configuration

This script imports the data into the new Copy of Production Database. The script name for your path is:

MVCGFAU25I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 4-6: Modifying Trigger Tables

This section discusses:

- Understanding Modifying Trigger Tables
- Building the Trigger Sync Script
- Running the Trigger Sync Script

Understanding Modifying Trigger Tables

In this task, you alter without delete some tables on which the triggers on another set of tables depend. This particular task must occur outside of the standard Modifying Database Structure tasks due to restrictions that the table naming conventions impose on the build order of these tables.

Task 4-6-1: Building the Trigger Sync Script

This step generates the SQL script to alter without delete a set of tables on which the triggers on another set of tables depend. The script name for your upgrade path is:

UPG_SPL_DELSYNCH.SQL

Note. If you are upgrading from PeopleSoft 8.80, this step may produce warnings, since the records being altered would be new for your install.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-6-2: Running the Trigger Sync Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7: Modifying the Database Structure

This section discusses:

- Understanding Modifying the Database Structure
- Backing Up for DB2
- Building the Upgrade Tables Script
- ReCreating Upgrade Tables

- Creating the ALLTEMPTABS Project
- Building the Create Temp Tables Script
- Creating the ALLTABS Project
- Building the Create and Alter Scripts
- Editing the Create and Alter Scripts
- Creating Temporary Tables
- Creating Tables
- Altering Tables
- Creating Indexes
- ReCreating Triggers
- Reviewing the Create Indexes Log
- Creating Indexes for Data Conversion
- Creating Upgrade Views
- Setting Index Parameters
- Setting Temp Table Tablespace Names
- Setting Tablespace Names
- Setting Record Parameters
- Generating a DB2 UNIX RUNSTATS Script
- Updating Statistics for DB2 UNIX
- Updating Statistics for DB2 zOS
- Updating Statistics for Informix
- Updating Statistics for Oracle

Understanding Modifying the Database Structure

In this task you create and run various scripts and processes that will modify your database structure, including creating new tables and indexes, altering tables that have changed, and re-creating modified indexes.

Note. In the Change Assistant job, some of the steps may complete without error, but display a Warning icon indicating that warning messages exist in the log file.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release, “Error Handling.”

Task 4-7-1: Backing Up for DB2

If you are using the DB2 z/OS platform, back up your database now. This enables you to restart your upgrade from this point if you should experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	DB2 z/OS	All

Task 4-7-2: Building the Upgrade Tables Script

This step generates the SQL script to drop and re-create all the tables in the project named UPGCONVERT. These tables will be used during data conversion by Application Engine programs. They can be safely dropped at this time because they do not contain application data required by your PeopleSoft system.

The script name for your upgrade path is:

UPGCONVERT_CRTTBL.SQL

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-3: ReCreating Upgrade Tables

This step runs the SQL script you generated to re-create all the tables in the project named UPGCONVERT.

The script name for your upgrade path is:

UPGCONVERT_CRTTBL.SQL

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-4: Creating the ALLTEMPTABS Project

This step creates a project named ALLTEMPTABS and inserts all records of the type *Temporary Table*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-5: Building the Create Temp Tables Script

This step generates the SQL script to drop and re-create all the records of type Temporary Table in the database. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

ALLTEMPTABS_CRTTBL.SQL

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-6: Creating the ALLTABS Project

This step creates a project named ALLTABS and inserts all records of the type *Table*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-7: Building the Create and Alter Scripts

This step generates the SQL script to create all new records of the type *Table*. The script name is:

ALLTABS_CRTTBL.SQL

This step generates the SQL script to alter all existing records of the type *Table*. This script is referred to as Alter Without Deletes. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Columns that will eventually be deleted will still exist on the tables after this script is executed. The script name is:

ALLTABS_ALTTBL.SQL

This step also generates the SQL script to create new indexes and to re-create modified indexes as needed for the tables in the first two scripts. The script name is:

ALLTABS_CRTIDX.SQL

Note. This step also creates the script ALLTABS_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, because all database triggers will be created in the “Finalizing the Database Structure” task.

Note. For DB2 z/OS sites, if this step takes an exceptionally long time, performing a RUNSTATS on the system catalog tablespace SYSDBASE may improve performance.

See Finalizing the Database Structure.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-8: Editing the Create and Alter Scripts

In this step, you will edit the SQL create and alter scripts for tablespace names and sizing. The script names for your upgrade path are:

```
ALLTEMPTABS_CRTTBL.SQL
ALLTABS_CRTTBL.SQL
ALLTABS_ALTTBL.SQL
ALLTABS_CRTIDX.SQL
```

If you are not using the PeopleSoft tablespace names, you will need to review and modify the scripts above. When the new record was copied to the Copy of Production database, the PeopleSoft default tablespace name was copied as well. When you performed the step, “Create New Tablespaces,” you were given the option to correct the tablespace names online or to wait and edit the scripts. After you have completed running these scripts you will run the programs that synchronize the PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleTools definition. Have your database administrator review these scripts and modify the tablespace names appropriately.

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors. After the upgrade is complete, you may want your database administrator to review and make adjustments to the amount of free space left in some of the tables or tablespaces.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 4-7-9: Creating Temporary Tables

This step runs the SQL script you generated to create all the records of the type *Temporary Table*. The script name for your upgrade path is:

```
ALLTEMPTABS_CRTTBL.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-10: Creating Tables

This step runs the SQL script you generated to create all the records of the type *Table*. This step creates new table structures in your database. The script name for your upgrade path is:

ALLTABS_CRTTBL.SQL

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-11: Altering Tables

This step runs the SQL script you generated to alter the existing records of type *Table*. This step alters existing PeopleSoft table structures to comply with your new PeopleSoft release.

The script name for your upgrade path is:

ALLTABS_ALTTBL.SQL

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-12: Creating Indexes

This step runs the SQL script you generated to create indexes on records of the type *Table*. This step creates or modifies indexes as required.

The script name for your upgrade path is:

ALLTABS_CRTIDX.SQL

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-13: ReCreating Triggers

This step executes the script CREATETRGR.DMS, which will re-create all PeopleSoft triggers in the database. The triggers on PeopleSoft tables were invalidated when the tables were altered and need to be re-created.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-7-14: Reviewing the Create Indexes Log

When Change Assistant runs the create indexes script to create indexes, it will not stop when it encounters errors. When you view the log file, you will see that some indexes cannot be created due to unique index constraints. The data causing those indexes to fail will be updated during the task, “Running Data Conversion.” The indexes will then create successfully during the task, “Finalizing the Database Structure.”

Review the errors in the log file. Unique constraint errors are acceptable. If you see any other types of index creation errors, such as space problems, you must correct them before you continue with the upgrade. If you do not correct the errors, it may degrade your performance during data conversion.

The log file name for your upgrade path is:

ALLTABS_CRTIDX.LOG

See Running Data Conversion.

See Finalizing the Database Structure.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-15: Creating Indexes for Data Conversion

During this step, you will create indexes to improve performance during data conversion. These indexes are only used for the purposes of data conversion. They are not required for regular operation of the products, therefore they were not created in previous steps nor are they delivered with the record definitions on the Demo database. In this step you are asked to manually create those indexes that apply to you (not using Application Designer).

It is important to follow the following naming convention so the Alter with Deletes script you run in the task “Finalizing Database Structure” will drop these indexes automatically. Use PS[X]Record Name where X is any letter A-Z. For example, if you have to create an index for table PS_COUNTRY_TBL a proper index name would be PSUCOUNTRY_TBL. If an additional index is required for that same table, you can then name it (for example) PSYCOUNTRY_TBL. However, it is important to ensure that the new name of the index you are creating is not defined in the database already.

Not all listed indexes are required for all customers. Reading the comments with each listed index will help you determine if the index is applicable to your specific upgrade. Work with your database administrator to create a script that will build the indexes in your Copy of Production. You can then modify the Change Assistant Template to automate this step (for the initial pass and all future passes too). To do that, go to the Upgrade Template view, then right-click on the step and edit the step properties. Add your script name, without the file extension, in the Script/Procedure field and change the Type to SQL Script.

After reading the comments to determine whether the index is applicable to your situation, create or modify the following indexes in your Copy of Production database:

Table	With Columns	Comments
PS_BI_LINE	ORDER_NO BUSINESS_UNIT_OM ORDER_INT_LINE_NO SCHED_LINE_NBR	This index should be non-unique.
PS_CM_ACCTG_LINE	TRANSACTION_GROUP BUSINESS_UNIT_OM BUSINESS_UNIT ORDER_NO ORDER_INT_LINE_NO SCHED_LINE_NO INV_ITEM_ID SEQ_NBR SHIP_ID CHARGE_TYPE CM_BOOK	This index should be non-unique. This improves the performance of the data conversion code where BUSINESS_UNIT_OM has been added as an additional key on CM_ACCTG_LINE.
PS_CM_DEplete	BUSINESS_UNIT INV_ITEM_ID DT_TIMESTAMP SEQ_NBR	This index should be non-unique. It prevents full table scan during insertion into table CM_UNDEplete.
PS_CUST_CONVER_DTL	CONVR_QUALIFIER_CD BUSINESS_UNIT CUST_ID CONVR_QUAL_FIELD ITEM_LINE	This index should be non-unique. ARM05 will use this table to update all ITEM records where a CUST_CONVER_DTL exists. (CONVR_QUAL_FIELD is ITEM when CONVR_QUALIFIER_CD = 'I').

Table	With Columns	Comments
PS_INTFC_BI	ORDER_NO BUSINESS_UNIT_OM ORDER_INT_LINE_NO SCHED_LINE_NBR	This index should be non-unique.
PS_INTFC_BI_CMP	BUSINESS_UNIT_OM ORDER_NO ORDER_INT_LINE_NO SCHED_LINE_NBR TRANS_TYPE_BI	This index should be non-unique.
PS_ITEM	VAT_ENTITY	This index should be non-unique. It is only used when processing VAT in Receivables. It will improve performance for several steps in section ARM05.
PS_ITEM_ACTIVITY	ITEM ITEM_LINE GROUP_BU GROUP_ID	This index should be non-unique. It will significantly improve performance for step ARY01.Step06 in populated fields TRAN_FROM_BU and TRAN_FROM_CUSTID.
PS_MASTER_ITEM_TBL	INV_ITEM_ID	This index should be non-unique. Field INV_ITEM_ID on table MASTER_ITEM_TBL is used in joins and selects throughout the data conversion code.
PS_PENDING_ITEM	ITEM ITEM_LINE GROUP_BU GROUP_ID	This index should be non-unique. It will significantly improve performance for step ARY01.Step06 in populated fields TRAN_FROM_BU and TRAN_FROM_CUSTID.
PS_PENDING_ITEM	VAT_ENTITY	This index should be non-unique. It is only used when processing VAT in Receivables. It will improve performance for several steps in section ARM01.
PS_PYMNT_ADVICE	BANK_SETID BANK_CD BANK_ACCT_KEY PYMNT_ID	This index should be non-unique. It will significantly improve performance for step APK01-A.Step02.

Table	With Columns	Comments
PS_SF_OUTPUT_LIST	BUSINESS_UNIT PRODUCTION_ID	This index should be non-unique. These fields are used to populate the main loop table used in the Product Configurator pegging update conversion.
PS_SF_PRDNID_HEADR	BUSINESS_UNIT PRODUCTION_ID PROD_STATUS	This index should be non-unique. Fields BUSINESS_UNIT, PRODUCTION_ID, and PROD_STATUS on table SF_PRDNID_HEADR are used in multiple updates in the Manufacturing data conversion code for Yield by Operation functionality.
PS_SF_PRDNID_HEADR	BUSINESS_UNIT PRODUCTION_ID PROD_STATUS BUSINESS_UNIT_OM ORDER_NO ORDER_INT_LINE_NO	This index should be non-unique. These fields are used to populate the main loop table used in the Product Configurator pegging update conversion.
PS_SUT_DFLT_TBL	SUT_APPL_FLG	This index should be non-unique. The translate values for field SUT_APPL_FLG on table SUT_DFLT_TBL has been changed.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-16: Creating Upgrade Views

This step will create the views included in the project definition UPGVIEWS. These views are only needed for the manual setup tasks between here and running data conversion as well as data conversion itself.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-17: Setting Index Parameters

This step updates index overrides stored in the PSIDXDDLPARM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

SETINDEX.SQR

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle DB2 z/OS	All

Task 4-7-18: Setting Temp Table Tablespace Names

This step populates the PeopleTools table PSRECTBLSPC with the table name, database name, and tablespace name information for the temporary table instances created on the database in a previous step. This information will be required by processes that perform in-stream RUNSTATS (%UpdateStats) on the temporary table instances. The name of the process is:

SETTMPIN.SQR

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-7-19: Setting Tablespace Names

This step populates all tablespace information in the PSRECTBLSPC table. The values stored in the DDLSPACENAM field are updated with current values found in the system catalog. If you modified tablespace names when you edited the SQL script that created your new tables from the PeopleSoft-delivered names, this will make those same changes in the PeopleSoft record definition. The name of the process is:

SETSPACE.SQR

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 4-7-20: Setting Record Parameters

This step updates table overrides stored in the PSRECDDLPRM table. The values stored in the PARMVALUE field are updated with the current values found in the system catalog. The name of the process is:

SETTABLE.SQR

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-7-21: Generating a DB2 UNIX RUNSTATS Script

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update the statistics on DB2 UNIX/NT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-7-22: Updating Statistics for DB2 UNIX

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again. Run the RUNSTATS.SQL script created in the previous step to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-7-23: Updating Statistics for DB2 zOS

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-7-24: Updating Statistics for Informix

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 4-7-25: Updating Statistics for Oracle

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-8: Loading Data for Data Conversion

This section discusses:

- Swapping Languages on System Data
- Exporting Application Messages
- Importing Application Messages
- Exporting Record Groups
- Importing Record Groups
- Exporting the System Setup Data
- Importing the System Setup Data
- Exporting the PW Pagelet Data

- Importing the PW Pagelet Data
- Exporting the Pagelet Wizard Data
- Importing the Pagelet Wizard Data
- Exporting Upgrade Defaults
- Importing Upgrade Defaults
- Exporting Application Data
- Importing Application Data
- Exporting Data Conversion Driver Data
- Importing Data Conversion Driver Data

Task 4-8-1: Swapping Languages on System Data

This script swaps the base language for tables that contain system data on your Demo database and have related language data, in preparation for the system data exports in the next step. This script should be run only if your Copy of Production has a base language other than English. The script name for your upgrade path is:

DLEPLASWAP.DMS

If you want to make this step automated, select the step Swap Languages on System Data in Change Assistant, open the Step Properties dialog box, change the Type from ManualStop to DataMoverUser, and click OK twice.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	Non-English Base Language

Task 4-8-2: Exporting Application Messages

This step exports Application Messages data from the Demo database. The script name for your upgrade path is:

DLUPX01E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-8-3: Importing Application Messages

This step imports Application Message data into your Copy of Production database. Message Sets 0-999 are overlaid during the PeopleTools Upgrade. Application Message Sets 1000-19,999 are overlaid with this task. If you have added custom messages in this set range, you must add those messages again at the end of the upgrade. To prevent this from happening again in future maintenance or upgrades, add your custom messages in a set range of 20,000 or greater.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

DLUPX01I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-8-4: Exporting Record Groups

This step exports Record Group data from the Demo database. The script name for your upgrade path is:

DLUPX02E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-8-5: Importing Record Groups

This step imports Record Group data and populates Set Control data in your Copy of Production database. The following records are related to Record Groups and Set Control data:

- REC_GROUP_REC
- REC_GROUP_TBL
- SET_CNTRL_TBL
- SET_CNTRL_GROUP
- SET_CNTRL_REC
- SETID_TBL

The import script deletes from, and then reloads, the Record Group tables, REC_GROUP_REC and REC_GROUP_TBL. These are the tables that are modified when you use PeopleTools, Utilities, Administration, Record Group. The script then rebuilds the related setID tables, PS_SET_CNTRL_GROUP and PS_SET_CNTRL_REC. The PS_SET_CNTRL_TBL and PS_SETID_TBL tables contain the setIDs you use in your system; this script does not update PS_SET_CNTRL_TBL. However, it does check for orphan setID references in PS_SET_CNTRL_REC and adds the missing setIDs to PS_SETID_TBL.

If you have moved a PeopleSoft-delivered record into a custom added record group, and deleted the record from the PeopleSoft-delivered record group, this script will put the record back into the PeopleSoft-delivered record group and remove it from the custom added record group.

If you have created a new record group, it will be deleted in this step if all of its records are assigned to PeopleSoft-delivered record groups in the new release. To continue using your custom record group, you will need to re-create it in the Reapply Customizations task.

This script creates an output file and uses it to create a temporary table. To run successfully, the Configuration Manager input and output Data Mover directories should be the same.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

DLUPX02I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-8-6: Exporting the System Setup Data

This script exports the contents of the Message, Strings, Stored Statements, Record Group, data conversion driver, EDI, and Mass Change tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran other scripts to load this data and in some cases had to reapply customizations. This script exports the entire contents of these tables, including customizations, so that you will not need to reapply them after the Move to Production. The script name for your upgrade path is:

MVAPPEXP.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 4-8-7: Importing the System Setup Data

This script imports the data exported in the previous step into your New Copy of Production database during your Move to Production passes. This script replaces many scripts that you ran in the initial pass. It will move all data in these tables so that any customizations you have added to these tables during your initial pass will be moved to your New Copy of Production database. Also, it will rebuild the Set Control tables using the Record Groups from the Copy of Production database and your current Set Control values on the New Copy of Production database. The script name for your upgrade path is:

MVAPPIMP.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 4-8-8: Exporting the PW Pagelet Data

This script exports the application-specific Pagelet Wizard pagelet definition, header, footer, and category tables from the Demo database in the initial pass. The script name is:

DLUPX14E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-8-9: Importing the PW Pagelet Data

This script imports the application-specific data for the Pagelet Wizard pagelet definition, header, footer, and category tables into your Copy of Production database during the initial pass. This data is needed for the data conversion. The script name is:

DLUPX14I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-8-10: Exporting the Pagelet Wizard Data

This script exports the contents of the Pagelet Wizard tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran programs and scripts to load this data and in some cases had to make changes. This script exports the entire contents of these tables, including changes, so that you will not need to reapply them after the Move to Production. This data is needed for the data conversion. The script name is:

MVUPX16E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 4-8-11: Importing the Pagelet Wizard Data

This script imports the Pagelet Wizard tables from the Copy of Production database into the New Copy of Production during your Move to Production passes. This script replaces processes that you ran in the initial pass. It will move all data in the affected tables so that any changes you have made during your initial pass will be moved to your New Copy of Production database. This data is needed for the data conversion. The script name is:

MVUPX16I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 4-8-12: Exporting Upgrade Defaults

This script exports the upgrade default data values and mapping during your Move to Production passes. This is the data that you set up during the chapter “Prepare Your Database” of your initial upgrade pass. You will load this information into your New Copy of Production later in the Move to Production upgrade pass. The script name for your upgrade path is:

MVEP88EXP.DMS

See “Prepare Your Database.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 4-8-13: Importing Upgrade Defaults

This script imports the upgrade default data values and mapping that you set up during the chapter “Prepare Your Database,” of your initial upgrade pass. The script name for your upgrade path is:

MVEP88IMP.DMS

See “Prepare Your Database.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 4-8-14: Exporting Application Data

This script exports data from the Demo database for various application system data tables. The script name for your upgrade path is:

DLEPUPM33E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 4-8-15: Importing Application Data

This script imports data into your Copy of Production database. These tables are various application system data tables that contain data required for some data conversion programs. The remaining application system data will be loaded after tables are altered to delete obsolete columns. The script name for your upgrade path is:

DLEPUPM33I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-8-16: Exporting Data Conversion Driver Data

This step exports data conversion Application Engine driver data from the Demo database. The script name for your upgrade path is:

DLUPX03E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-8-17: Importing Data Conversion Driver Data

This step imports data conversion Application Engine driver data into your Copy of Production database.

The script name for your upgrade path is:

DLUPX03I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-9: Restoring New Release Demo

Restore your New Release Demo database from the backup you took in Chapter 1 earlier in the upgrade. The backup was taken before projects were copied and scripts were run against the Demo database. This is done to restore the environment to the original Demo database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-10: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your Demo database. Now is a great time to check PeopleSoft Customer Connection again for any new postings, and apply them now. Before data conversion, you should also verify that you have the most current UPGCONVERT.EXE.

This is just one place that you can apply updates. There are other places in the upgrade process where applying updates may be applicable as well. How you apply the update varies depending on where you are in the upgrade.

See Appendix: “Applying Fixes Required for Upgrade.”

Important! Apply all fixes listed under the product line/release, even if you have not licensed the product the fix is listed under. There are many interdependencies between products and database objects. If you do not apply the fix, you may be introducing another error in a different area of the conversion code.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade Change Packages using the “Download Change Package” functionality in Change Assistant.
2. Use Change Assistant to install and apply the updates into your Demo database for this upgrade pass. Review the documentation included with each update prior to applying the update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release.

3. The project is now loaded on your Demo database. You should run a project compare to make sure the objects in the fix will not overwrite any of your customizations. If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.
4. If you are performing a Move to Production upgrade pass, first migrate the Change Packages into the Source database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the Change Package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply it to the Source database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release, “Applying Updates.”

5. Migrate the Change Packages into the Target database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Target database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-11: Configuring Scheduler and Server

You can manually run data conversion jobs on the server. Refer to the appendix “Improving Performance” for instructions. If you choose to run data conversion manually, configure and start your process scheduler and application servers now.

Tips for configuring and starting the application server:

- Make sure the application server domain being configured points to the Target database for this pass of the upgrade.
- Set a different JSL port for each database instance.

See the Enterprise PeopleTools installation guide for your database platform for the new release.

See Appendix: “Improving Performance.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-12: Backing Up Before Data Conversion

Back up your database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remainder of the tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-13: Running Data Conversion

This section discusses:

- Reviewing Data Conversion Tips
- Running Data Conversion for Group 1
- Running Data Conversion for Group 2
- Running Data Conversion for Group 3
- Running Data Conversion for Group 4

Note. In this task you will populate new tables and columns. Earlier, you altered tables and added all new and modified columns. You did not, however, remove obsolete columns. The following steps will move data from the obsolete columns to the new columns and tables. Later in this chapter, in the task “Finalizing the Database Structure,” you will generate and run SQL to delete those obsolete columns. The Upgrade Driver Application Engine program, UPG_DATACONV, will run all upgrade data conversions.

Task 4-13-1: Reviewing Data Conversion Tips

This section discusses:

- Upgrade Driver Program – UPG_DATACONV
- Data Conversion Documentation
- Running Data Conversion Concurrently
- Writing Data Conversion for Your Non-PeopleSoft Records
- Data Conversion Errors Expected During the Initial Upgrade Pass
- Restarting Data Conversion

Upgrade Driver Program – UPG_DATACONV

UPG_DATACONV is an Application Engine program designed to run all upgrade data conversions. Each time the program is run during an upgrade pass, Change Assistant passes a group number parameter to the program. The program then reads the table PS_UPG_DATACONV, selecting all rows with that group number and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. You can review the sections that are called by the Upgrade Driver program by accessing the Define Upgrade Drivers page on the Demo database.

Data Conversion Documentation

Each section called by the Upgrade Driver program contains comments describing the underlying conversion. By running the UDATA CNV.SQR report you can find which sections are called by the Upgrade Driver program and what they are doing.

See Appendix: “Using Data Conversion Utilities.”

Running Data Conversion Concurrently

Each data conversion step in this task corresponds to a group number as defined in the Define Upgrade Drivers page. Each group is independent of the others unless otherwise documented, allowing the groups to be run concurrently. PeopleSoft recommends that you run data conversion in the order it appears in your template during the initial upgrade pass to determine processing times. This is why the Change Assistant templates are delivered with the data conversion steps’ “Run Concurrently” property set to “No.” To reduce overall processing time during your Move to Production passes, you may decide to run some or all conversion steps concurrently. To run steps concurrently, reset the “Run Concurrently” property to “Yes” in your Change Assistant template.

Note. Group 1 data conversion, run later in this task, can not be run concurrently with any of the other groups. It must be completed first before running any other data conversion.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release.

Writing Data Conversion for Your Non-PeopleSoft Records

The data conversion code delivered for this upgrade was written to handle only PeopleSoft-delivered records. You may have added your own records to the system. To convert data in the underlying tables, you may need to create your own Application Engine library. The Upgrade Driver program can call an Application Engine library section that you create. To have the Upgrade Driver program call your custom section during this task, you will need to add the section on the Define Upgrade Drivers page.

See Appendix: “Using Data Conversion Utilities.”

Data Conversion Errors Expected During the Initial Upgrade Pass

During your initial upgrade pass you can expect to have data conversion programs fail. This is because your PeopleSoft installation is unique, which makes it difficult to write data conversions that will work for everyone all of the time. Your database may be larger than most, you may have customized PeopleSoft-defined records, or you may not have copied all object deletions onto your Copy of Production. These differences will cause data conversion to fail. You must fix each problem on your initial Copy of Production and restart the Application Engine program. Your fixes will be automatically copied to your New Copy of Production during the Move to Production passes and data conversion will run smoothly.

If you have customized records that are delivered from PeopleSoft, you may need to make changes to the Application Engine programs to handle these customizations. For example, here are two situations in which you may need to customize data conversion code:

- If you added fields to a PeopleSoft-delivered record, you may need to add your additional fields to the conversion code for those records.
- If a PeopleSoft-delivered record you customized will be deleted, you may need to add your own conversions to move the data to a new location.

Use the Find In feature of Application Designer to determine which Application Engine programs affect your customized records.

To use the Find In feature:

1. Create a project and add all Application Engine programs and related objects that have a name starting with *UPG* and save the project.
2. Select Edit, Find In.
3. Enter each customized record name in the Find What field and your project name in the Project field.
4. Click Find.

The results will appear in the output window

Document any changes you make to data conversion programs. This way, if a new version of the program is delivered through PeopleSoft Customer Connection, you will know exactly what changes you have made. You can then reapply the changes to the new version of the program.

If your database is large, you may have data conversion programs that fail due to running out of space as you move data from one table to another. This problem can happen on all RDBMS platforms, but is more of a problem on those platforms using tablespaces. If your data conversion terminates abnormally with a space error, examine the Application Engine SQL statements that caused the problem. Determine where the data is coming from and how much will be moved. Have your database administrator adjust the allocated space accordingly. The data conversion can then be restarted.

If you get a data conversion error because a field does not exist on a table, and the field is not one you have customized, check your field renames. If a field that appears on a record that is deleted in the new PeopleSoft release but was not deleted in your compare and copy, your table will be out of sync with what is expected by data conversion. If you had deleted the record, the rename would not happen on the physical table and the field would have the old name. This is what the data conversion program expects. If you did not delete the record, the field was renamed during the altering of tables and the data conversion program will terminate abnormally. Edit the Application Engine SQL to use the name, which is now on your table, and then restart the data conversion.

See Appendix: "Using the Comparison Process."

Restarting Data Conversion

Before restarting a data conversion step, rename the log file. Change Assistant uses the same log file name each time you start or restart an Application Engine program. This means that the restarted Application Engine program will replace the original log file if it is not renamed.

If your data conversion program fails, fix the problem on your Copy of Production and restart the program. When you set the data conversion step to Restart in your Change Assistant job, it will rerun the program using the PROCESS_INSTANCE and RUN_CNTL_ID from the initial run and the conversion will restart right after the last committed SQL command. Application Engine keeps track of data committed to the database in the table PS_AERUNCONTROL, keyed by PROCESS_INSTANCE and RUN_CNTL_ID.

See Finalizing the Database Structure.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-13-2: Running Data Conversion for Group 1

This step runs the UPG_DATACONV Application Engine program for Group 1. For additional documentation for Group 1, run the UDATACNV report.

Group 1 must execute successfully before any other groups (if applicable) can run. If there are other groups and you decide to run groups concurrently, Group 1 must complete before you launch any other groups.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-13-3: Running Data Conversion for Group 2

This step runs the UPG_DATACONV Application Engine program for Group 2. If you want to see additional documentation for Group 2, then run the UDATACNV report.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-13-4: Running Data Conversion for Group 3

This step runs the UPG_DATACONV Application Engine program for Group 3. If you want to see additional documentation for Group 3, then run the UDATACNV report.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-13-5: Running Data Conversion for Group 4

This step runs the UPG_DATACONV Application Engine program for Group 4. If you want to see additional documentation for Group 4, then run the UDATACNV report.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-14: Backing Up After Data Conversion

Back up your database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15: Finalizing the Database Structure

This section discusses:

- Understanding Final Database Structure
- Building the UPG SPL SYNCH Script
- Running the UPG SPL SYNCH Script
- Building the Alter with Deletes Scripts
- Altering Tables with Deletes
- Creating Indexes Again
- Creating Triggers
- Running the AE SYNCIDGEN Process
- Creating All Views

Understanding Final Database Structure

Now that Data Conversion is completed, this task will alter the tables to remove obsolete columns, and create final indexes and views.

Task 4-15-1: Building the UPG SPL SYNCH Script

This step generates the UPG_SPL_SYNCH.SQL script that contains SQL to alter existing tables. This SQL will alter tables using the Table Rename option.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-2: Running the UPG SPL SYNCH Script

In this step, you run the SQL script generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-3: Building the Alter with Deletes Scripts

This step uses the previously created project ALLTABS and generates three SQL scripts: one that will alter tables to drop obsolete columns, one that will also create any remaining indexes that could not be created with the first alter, and one that will create triggers. The script names are:

```
ALLTABS_DEL_ALTTBL.SQL
ALLTABS_DEL_CRTIDX.SQL
ALLTABS_DEL_CRTRTG.SQL
```

Important! All indexes should create when the ALLTABS_DEL_CRTIDX.SQL script is run. When a unique index fails to create, it is probably due to a data conversion issue. If a unique index fails to create, you must resolve the issue and not simply remove the index. To prevent this issue, you can back up tables in the ALLTABS_DEL_ALTTBL.SQL script that will be dropping recfields that have data. This way, if you have an issue you may have the old fields and data you need to correct it.

Note. For DB2 z/OS sites, if this step takes an exceptionally long time, performing a RUNSTATS on the system catalog tablespace SYSDBASE may improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-4: Altering Tables with Deletes

This step executes the script, ALLTABS_DEL_ALTTBL.SQL, which was generated in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-5: Creating Indexes Again

This step executes the script ALLTABS_DEL_CRTIDX.SQL, which was generated in the previous step. All indexes should create at this time.

Important! Review the log to find any unique indexes that might have failed to create. All indexes should create at this time, so those errors are not acceptable and should be corrected. When a unique index fails to create, it is probably due to a data conversion issue.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-6: Creating Triggers

This step executes the script ALLTABS_DEL_CRTTRG.SQL, which was generated in a previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-7: Running the AE SYNCIDGEN Process

This step executes the AE_SYNCIDGEN Application Engine program. Mobile applications use Sync IDs to give each row a unique identifier. For any tables with the Sync ID column set to the default value of zero, the AE_SYNCIDGEN program will populate the column with the next valid Sync ID value.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-8: Creating All Views

This step runs CREATEVW.DMS to re-create all views in the Copy of Production database. The script will try to create every view in Application Designer. If there is an error on one view, it will keep going until it gets to the end of the list.

Important! Review the log to find any views that failed to create. All views should create at this time, so those errors are not acceptable and should be corrected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-16: Loading Data to Complete System Setup

This section discusses:

- Exporting Strings
- Importing Strings
- Exporting EDI Statements
- Importing EDI Statements
- Exporting Mass Change Data
- Importing Mass Change Data
- Exporting XML Service Information
- Importing XML Service Information
- Exporting Related Language System Data
- Importing Related Language System Data
- Exporting Application System Data
- Importing Application System Data
- Exporting Converted Application Base Data
- Importing Converted Application Base Data
- Exporting Notification Template Table
- Importing Notification Template Table
- Exporting Approval Framework System Data
- Importing Approval Framework System Data
- Exporting Common Portal System Options
- Importing Common Portal System Options
- Exporting Setup Data
- Importing Setup Data

Task 4-16-1: Exporting Strings

This script exports Strings data from the Demo database. The script name for your upgrade path is:

DLUPX04E.DMS

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-16-2: Importing Strings

This script imports Strings data into the Copy of Production database. The script name for your upgrade path is:

DLUPX04I.DMS

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-16-3: Exporting EDI Statements

This script exports EDI Statements from the Demo database. The script name for your upgrade path is:

DLUPX05E.DMS

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-16-4: Importing EDI Statements

This script imports the EDI Statements into the Copy of Production database. The script name for your upgrade path is:

DLUPX05I.DMS

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-16-5: Exporting Mass Change Data

This script exports Mass Change tables from the Demo database. The script name for your upgrade path is:

DLUPX06E.DMS

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-16-6: Importing Mass Change Data

This script imports Mass Change tables into the Copy of Production database. The script name for your upgrade path is:

DLUPX06I.DMS

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-16-7: Exporting XML Service Information

This script exports XML service data from the Demo database. The script name for your upgrade path is:

DLUPX13E.DMS

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-16-8: Importing XML Service Information

This script imports XML service data into the Copy of Production database. The script name for your upgrade path is:

DLUPX13I.DMS

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-16-9: Exporting Related Language System Data

This script exports system data from various application-related language tables in your Demo database into a Data Mover *.DAT file. In a later step, this data will be loaded into your Copy of Production. The script name for your upgrade path is:

DLEPLASYSE.DMS

Note. During Move to Production passes you can reuse the data files that are created by this export script. Preserve this DAT file, and set the 'Type of Upgrade' property in the Change Assistant template to Initial Upgrade for this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	Any installed in addition to English

Task 4-16-10: Importing Related Language System Data

This script will delete old related language system data from related language tables. The script then imports the data exported by the scripts above. The script name for your upgrade path is:

DLEPLASYSI.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	Any installed in addition to English

Task 4-16-11: Exporting Application System Data

This script exports system data from various application tables from the Demo database into a Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

DLEPSYSE.DMS

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, change the Type of Upgrade from Both to Initial Upgrade in the step properties and save the job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 4-16-12: Importing Application System Data

This script imports the application system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

DLEPSYSI.DMS

Note. Some of the data will be imported using the *ignore dups* option. These data loads will give the message “Error: duplicate SQL rows” and then give a “Successful completion” message. These error messages can be ignored because duplicate data is expected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-16-13: Exporting Converted Application Base Data

To avoid running the ChartField Configuration process again in the Move to Production passes, this setup will export selected data updated by this process from your first Copy of Production Database. The tables exported in this script have been updated by some data conversions. The script name for your path is:

MVCGUPY27E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	All	All	All

Task 4-16-14: Importing Converted Application Base Data

This script imports your ChartField Configuration data into the new Copy of Production database. The script name for your path is:

MVCGUPY27I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 4-16-15: Exporting Notification Template Table

This script exports the notification template information from the Demo database into a Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

DLCGUPY39E.DMS

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve this DAT file, and set the properties in the template for Initial Upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 4-16-16: Importing Notification Template Table

This script imports the system data, exported in the above step, into the Copy of Production database. The script name for your upgrade path is:

DLCGUPY39I.DMS

Note. Run this script using bootstrap mode.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-16-17: Exporting Approval Framework System Data

This script exports the approval framework system data from the Demo database into a Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

DLCGUPY41E.DMS

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve this DAT file, and set the properties in the template for Initial Upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 4-16-18: Importing Approval Framework System Data

This script imports the system data, exported earlier in this task, into the Copy of Production database. The script name for your upgrade path is:

DLCGUPY41I.DMS

Note. Run this script using bootstrap mode.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-16-19: Exporting Common Portal System Options

This script exports the contents of the Common Portal System Options table from the Demo database. The script name for your upgrade path is:

DLEOX01E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	All	All	All

Task 4-16-20: Importing Common Portal System Options

This script imports the Common Portal System Options data into your Copy of Production database. The script name for your upgrade path is:

DLEOX01I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-16-21: Exporting Setup Data

This script exports setup data from the Demo database. The script name for your upgrade path is:

DLUPX16E.DMS

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	All

Task 4-16-22: Importing Setup Data

This script imports setup data into the Copy of Production database. The script name for your upgrade path is:

DLUPX16I.DMS

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-17: Loading Stored Statements

This section discusses:

- Running the STORECP Script
- Running the STOREFP Script
- Running the STOREGL Script
- Running the STOREIN Script
- Running the STORELC Script
- Running the STOREMG Script
- Running the STOREPO Script

Task 4-17-1: Running the STORECP Script

STORECP.DMS loads stored statements for COBOL programs owned by the Product Configurator product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Product Configurator	All	All

Task 4-17-2: Running the STOREFP Script

STOREFP.DMS loads stored statements for COBOL programs owned by the Flow Production product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Flow Production	All	All

Task 4-17-3: Running the STOREGL Script

STOREGL.DMS loads stored statements for COBOL programs owned by the General Ledger product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	General Ledger	All	All

Task 4-17-4: Running the STOREIN Script

STOREIN.DMS loads stored statements for COBOL programs owned by the Inventory product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Inventory	All	All

Task 4-17-5: Running the STORELC Script

STORELC.DMS loads stored statements for COBOL programs for Global products and is loaded for several products that support VAT processing.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Billing General Ledger Payables eSettlements	All	All

Task 4-17-6: Running the STOREMG Script

STOREMG.DMS loads stored statements for COBOL programs owned by the Manufacturing product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Manufacturing	All	All

Task 4-17-7: Running the STOREPO Script

STOREPO.DMS loads stored statements for COBOL programs run by the Purchasing product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Purchasing	All	All

Task 4-18: Updating Language Data

This section discusses:

- Understanding Updating Language Data
- Run the TSRECPOP Script

Understanding Updating Language Data

In this task, you run scripts to modify data in PeopleTools related language tables.

Note. For DB2 z/OS customers, PeopleSoft recommends that you run RUNSTATS against the system catalog tables at this time.

Task 4-18-1: Run the TSRECPOP Script

In this step, the TSRECPOP script initializes and modifies the data in PeopleTools related language architecture tables.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-19: Completing PeopleTools Conversion

The PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with a group number of 02 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-20: Updating Object Version Numbers

In this task, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Note. Do not update statistics after you complete this task.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21: Running the Final Audit Reports

This section discusses:

- Run the Final DDDAUDIT Report
- Run the Final SYSAUDIT Report
- Create the FNLALTAUD Project
- Run the Final Alter Audit
- Review the Final Audits
- Run a Final SETINDEX Report
- Run a Final SETTABLE Report

Task 4-21-1: Run the Final DDDAUDIT Report

DDDAUDIT is an SQR that compares your production SQL data tables with the PeopleTools record definitions to uncover inconsistencies. You can expect some errors from this report. You will review the output from the report in another step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21-2: Run the Final SYSAUDIT Report

SYSAUDIT is an SQR that identifies *orphaned* PeopleSoft objects. For example, SYSAUDIT will identify a module of PeopleCode that exists but does not relate to any other objects in the system. SYSAUDIT also identifies other inconsistencies within your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21-3: Create the FNLALTAUD Project

In this step, you create the FNLALTAUD project and use it to run your final Alter Audit. Creating this new project now ensures that all the records in your system are audited, including SQL tables and temp tables. This project also includes any custom records that you have created in your system.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21-4: Run the Final Alter Audit

Run the PeopleTools alter record process on all tables in your system to check whether the PeopleTools definitions are synchronized with the underlying SQL data tables in your database. PeopleSoft calls this process an Alter Audit. Alter Audit compares the data structures of your database tables with the PeopleTools definitions to uncover inconsistencies. Alter Audit then creates an SQL script with the DDL changes needed to synchronize your database with the PeopleTools definitions.

The Alter Audit script is built using the FNLALTAUD project created in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21-5: Review the Final Audits

The Alter Audit process creates SQL scripts that correct any discrepancies between your PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies noted by running the generated scripts with your platform-specific SQL tool. The script names are:

```
FNLALTAUD_ALTTBL.SQL
FNLALTAUD_CRTIDX.SQL
```

Note. The Alter Audit process also creates the script FNLALTAUD_CRTRTG.SQL, which re-creates all database triggers. You do not need to run this script, since all database triggers were created in a previous task.

See Finalizing the Database Structure.

Note. For Informix sites, if your database has Application Functions, you use SQL to drop and re-create these functions and their associated indexes, even though the underlying tables and indexes have not changed.

Note. For Microsoft SQL Server and DB2 UNIX platforms, if your database has tables containing the MSSCONCATCOL or DBXCONCATCOL column, you will see SQL alter the tables and re-create their associated indexes, even though the underlying tables and indexes may not have changed.

Review the output from the SYSAUDIT and DDDAUDIT reports and correct any discrepancies.

Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from the Application Designer are not automatically deleted from the system tables. PeopleSoft takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Your SYSAUDIT report may have some errors due to references to obsolete PeopleSoft-owned objects. For instance, if PeopleSoft deletes a Permission List, and you have a Role that still refers to that Permission, then it will appear on the SYSAUDIT report.

See the Enterprise PeopleTools PeopleBook: Data Management for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21-6: Run a Final SETINDEX Report

The SETINDEX SQR updates index overrides stored in the PSIDXDDLPRM table. The SQR updates the values stored in the PARMVALUE field with current values found in the system catalog. Running SETINDEX cleans up fragmentation issues that may have occurred during data conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS Oracle	All

Task 4-21-7: Run a Final SETTABLE Report

The SETTABLE SQR updates table overrides stored in the PSRECDDLPRM table. The SQR updates the values stored in the PARMVALUE field with the current values found in the system catalog. Running SETTABLE will clean up fragmentation issues that may have occurred during data conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

CHAPTER 5

Complete Database Changes

This chapter discusses:

- Understanding Database Changes
- Configuring the Upgrade Environment
- Reapplying Customizations
- Setting Up Security
- Completing Portal Data Conversion
- Backing Up Before Manual Changes
- Completing ChartField Configuration
- Reviewing PeopleTools Functionality
- Preparing the Content Provider Registry
- Updating the Portal Options Data
- Setting Country Codes
- Completing Credit Card Encryption
- Rebuilding Verity Search Indexes
- Reconciling Notification Templates
- Reviewing Approval Workflow Framework
- Completing Promotions
- Completing Billing Setup
- Configuring Order Management
- Configuring Attachments
- Completing Strategic Sourcing Setup
- Completing Services Procurement Setup
- Configuring PayBill Management
- Preparing Treasury Setup
- Reviewing Electronic Layouts for Banks
- Completing Setup for Projects
- Setting Sync IDs
- Setting Resource Management

- Performing Payables Setup
- Completing Receivables Changes
- Updating eSettlements
- Updating the General Ledger
- Setting Up Commitment Control
- Completing Asset Management Setup
- Completing Contracts Setup
- Setting VAT Processing
- Stamping the Database
- Reviewing Change Control
- Backing Up Before Testing
- Testing Your Copy of Production

Understanding Database Changes

Many changes were made in the previous chapters of this documentation. In this chapter, you complete these changes so that you can begin testing your Copy of Production. By testing your Copy of Production, you ensure that you can still operate day-to-day processes on your new PeopleSoft release.

Task 5-1: Configuring the Upgrade Environment

This section discusses:

- Configure Application Server
- Configure Portal

Task 5-1-1: Configure Application Server

Running Portal requires a fully functional application server domain. In this step, you configure your application server.

Note. If you configured your application server earlier in the upgrade, you can skip this step.

Tips for configuring and starting the application server:

- Make sure that the Application Server domain you configure points to the Target database for this pass of the upgrade.
- Set a different JSL port for each database instance.

See the Enterprise PeopleTools installation guide for your database platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-1-2: Configure Portal

PeopleSoft applications are accessed through the Portal. You need to grant users access to complete the upgrade process. You must install and configure the Portal to complete the upgrade.

Note. If you configured your Portal earlier in the upgrade, you can skip this step.

You also must define a password in Node Definition for Single Signon to work properly. If you do not define a password, the signon page appears when trying to access a report directly, instead of the report itself. To avoid this issue, follow the procedure below to assign a password.

To assign a password:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Click Search.
3. Select the database's default local node.
The default local node shows a *Y* in the Default Local Node column.
4. On the Node Info page, select *Password* as the Authentication Option.
5. Enter a password in the Password field.
6. Enter the password again in the Confirm Password field.
7. Save the Node Definition.
8. Reboot the application server and web server.

See the Enterprise PeopleTools installation guide for your database platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-2: Reapplying Customizations

This section discusses:

- Understanding the Reapplication
- Performing Customized Object Adjustment
- Registering Portal Navigation Objects

Understanding the Reapplication

In this task, you work with your customized objects to ensure that they are properly integrated into your upgraded database.

Task 5-2-1: Performing Customized Object Adjustment

When you reviewed your upgrade compare reports, you decided whether to take the Source or Target version of the objects. If you took the PeopleSoft version of an object instead of your own customized version, you may need to customize the new objects to get the blend of new standard features and your custom features. In complex cases, this may take several iterations. You need to make manual adjustments to the objects to apply these customizations.

Once you reapply all of your customizations, you should run the DDDAUDIT and SYSAUDIT reports to make sure that you did not introduce any problems into your system.

Reapply any Mass Change or EDI customizations.

See “Prepare Your Database,” Identifying Customizations.

Be aware that you must not overwrite PeopleSoft-loaded data. The customizations, extracted during an earlier step, must be manually applied now.

In another step, you applied the PeopleSoft-delivered record group assignments.

See “Apply Application Changes,” Loading Data for Data Conversion, Importing Record Groups.

If you maintain any custom record group assignments, reapply them to your Copy of Production database now.

During Move to Production passes, you will not need to reapply these customizations. The changes you make now will be copied to any subsequent Copy of Production database using Data Mover scripts.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-2-2: Registering Portal Navigation Objects

You must register your customized objects, such as menus and components, in order to access them in Portal. You can use the Registration Wizard or the Menu Import process to grant access to the appropriate components. Make sure that you register your components for all of your portals (for example, Customer, Supplier, Employee, and so forth). Also, make sure that you select the node name that matches the database. Do not use the Local node.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer for your new release, “Using the Registration Wizard.”

See the Enterprise PeopleTools PeopleBook: Internet Technology for your new release, “Administering Portals.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-3: Setting Up Security

This section discusses:

- Understanding Security
- Set Up Security
- Synchronize CREF Permissions
- Grant Access to Personalize Homepage

Understanding Security

In this task you perform steps to set up security, grant access to the user ID, set up permissions lists, and grant access to navigation and homepages.

Task 5-3-1: Set Up Security

This section discusses:

- Understanding Security Setup
- Updating Permissions and Roles: Services Procurement Customers

Understanding Security Setup

Select the PeopleTools, Security folder now to add the new PeopleTools and application menus, delete old menus, and set up appropriate operator security for your system.

Many menu additions and deletions have occurred. Examine the menu compare report and the PeopleSoft Demo database for details of the required security changes, then decide which of your roles and permission lists should have access to each of the new menus.

Many tasks in this chapter instruct you to select a specific menu within the new PeopleSoft release. To perform these tasks, set up appropriate security for each of the menus referenced in each of the tasks.

See the PeopleSoft Enterprise Portal Solutions PeopleBook: Enterprise Portal Application Technology for your new release, information on PeopleSoft-delivered security.

Note. Move to Production: If you changed the user profiles in your production system after you froze your PeopleTools, you must manually apply the changes to your Copy of Production database before the end of the final Move to Production.

Updating Permissions and Roles: Services Procurement Customers

Services Procurement broke out the approval permission list, EPSP5000, into separate permissions for each type of approval. Permission list EPSP5000 was previously associated with the SP_APPROVER role that allowed approval access to several functional areas including requisitions, work orders, time, expenses, progress logs, and invoicing. The table below lists the break out of the EPSP5000 approval permission list (EPSP5000 through EPSP5050). It also shows several new permissions that were added as a result of new features.

8.8x Permission List	Renamed/New Permission List
EPSP5000	EPSP5000 – Services Requisition Approval EPSP5010 – Services Work Order Approval EPSP5020 – Services Time Approval EPSP5030 – Services Progress Log Approval EPSP5040 – Services Invoice Approval EPSP5050 – Services Expense Approval
	EPSP5500 – Services Resource Identifier
EPSP8600–Supplier Administrator (8.8 SP1)	EPSP8600 – Supplier Administrator
	EPSP9500 – Services Integration Analyst

Three new approval roles have been added for the specific functions of approving time, expenses, and invoicing. Other roles have also been added as a result of new functionality. You will want to realign the permissions and roles for all your approval users and users of the new features.

8.8x Roles	Modified/New Roles
SP_APPROVER SP_PLOG_APPROVER* SP_WO_APPROVER*	SP_APPROVER SP_PLOG_APPROVER SP_WO_APPROVER SP_EXPENSE_APPROVER SP_TIME_APPROVER SP_INV_APPROVER
SP_DEVELOPER	OBSOLETE
	SP_INTEGRATION_SUPERVISOR
	SP_RESOURCE_IDENTIFY
SP_SUPPLIER_ADMINISTRATOR (8.8 SP1)	SP_SUPPLIER_ADMINISTRATOR
SP_PROVIDER_CONTACT_BY_LOC (8.8 SP1)	SP_PROVIDER_CONTACT_BY_LOC*
	SP_sup_inv_approver_byinvoice*

* Indicates the role is used for workflow routing purposes only. No permission lists are added to these roles in the specified release.

Note. The SP_APPROVER role should still be used for requisition approvals.

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-3-2: Synchronize CREF Permissions

This section discusses:

- Understanding Content Reference Permissions
- Running the Portal Security Synchronization Process

Understanding Content Reference Permissions

As part of the PeopleTools 8.4x Portal architecture, Portal Registry Structures reference permission lists. At this point, however, the Portal Registry Structures copied from the Demo database do not reference any permission lists on the Copy of Production database. This synchronization program will match the existing permission lists to the appropriate Registry Structures and update it.

Note. The user ID that invokes this process must have the security role Portal Administrator. Otherwise, the process may terminate abnormally.

Note. Your Process Scheduler must be running in order to perform this task.

Running the Portal Security Synchronization Process

Follow the steps below to run the Portal security synchronization process.

To run the security synchronization process:

1. From your browser, sign on to your Target database.
2. Select PeopleTools, Portal, Portal Security Sync.
3. Click Add a New Value.
4. Enter the run control ID *UPG_PORTAL_SYNC_BOTH*.
5. Click Add.
6. Keep the default value for the default portal registry name in the Portal Name field (for example: *EMPLOYEE*, *CUSTOMER*, or *SUPPLIER*).
7. Click Save.
8. Click Run.
9. In the Process Scheduler page, check that you set your parameters correctly.

10. Click OK.
11. Click the Process Monitor link to monitor the program's process.
12. Repeat steps 6 through 11 for each Portal name used in the database for your specific applications.

With each repetition, in step 6 change the Portal Name field to one of the following: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, *MOBILE*, and so on.

13. Review any messages received during the running of this process with your Portal Administrator.

See the Enterprise PeopleTools PeopleBook: Internet Technology for your new release.

Note. If the permission lists for your upgrade user do not allow you access to a component, you will encounter this error when running the security synchronization process for that page: **Security synchronization failed for Portal Object**. This error may indicate other problems with the component or folder, but you should check your security first.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-3-3: Grant Access to Personalize Homepage

This section discusses:

- Understanding Access to Portal Homepage
- Updating Homepage Personalization Permission List
- Adding the Portal User Role

Understanding Access to Portal Homepage

You must complete this step if you use any of the Portal Pack products or pagelets. In order to add, remove, or change the layout of the homepage, you must grant homepage personalization security access to all non-guest users.

Updating Homepage Personalization Permission List

To update the homepage personalization permission list:

1. Using PeopleSoft Data Mover, sign on to the Target database.
2. Open the Data Mover script *PS_HOME\SCRIPTS\PORTAL_HP_PERS.DMS*.
3. Run this script against the Target database.
4. Close Data Mover.

Adding the Portal User Role

To add the Portal User Role to the user IDs:

1. Using PeopleSoft Data Mover, sign on to the Target database.
2. Open the Data Mover script *PS_HOME\SCRIPTS\PORTAL_ADD_ROLE.DMS*.

3. Run this script against the Target database.
4. Close Data Mover.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, manually remove the role PAPP_USER from any GUEST user ID, because a GUEST user should not be personalizing the common homepage.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-4: Completing Portal Data Conversion

This section discusses:

- Reviewing Pagelet and Collection Log
- Enabling Pagelet Publishing

Task 5-4-1: Reviewing Pagelet and Collection Log

This section discusses:

- Correct Logged Issues
- Run UPGPT846PP Again

This step explains how to correct logged issues for Navigation Collections, Portal Registry objects, and Pagelet Wizard objects.

Note. Perform this step only if there are logged issues that need to be resolved for Navigation Collections, Portal Registry Objects, or Pagelet Wizard objects reported from the UPGPT846PP process.

Correct Logged Issues

Review the log from running the data conversion UPGPT846PP Application Engine program in the task titled, "Completing PeopleTools Conversion." Correct the issues from the log using the instructions in the MAIN section comments of the UPGPT846PP program. These instructions were reported in the chapter 2 task "Converting PeopleTools Objects" in the "Report Conversion Details" step.

Run UPGPT846PP Again

In this step, you run the UPGPT846PP process again.

Note. The Application Engine process UPGPT846PP can be run repeatedly, if necessary, as you resolve data issues.

To run UPGPT846PP again:

1. Run the Application Engine conversion process UPGPT846PP with the upgrade user ID.

The program can be run from the command line with the following:

```
$PS_HOME\bin\client\winx86\psae -CD dbname -CT dbtype -CS dbservername -CO =>
oprid -CP oprpswd -R 1 -AI UPGPT846PP
```

2. Review the log file according to the instructions in the previous step.
3. If there are any remaining issues, correct them and rerun UPGPT846PP.
4. Repeat steps 2 and 3, if necessary, until there are no remaining issues for Navigation Collections, Portal Registry objects, or Pagelet Wizard objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4-2: Enabling Pagelet Publishing

This step enables the creation of homepage pagelets for Navigation Collections and Pagelet Wizard. The script name for your upgrade path is:

```
PTPP_PORTAL_PACK.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5: Backing Up Before Manual Changes

Back up your Copy of Production database now. This enables you to restart your upgrade from this point should you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-6: Completing ChartField Configuration

This section discusses:

- Running the Configuration Steps Report
- Performing Manual Configuration Steps

Task 5-6-1: Running the Configuration Steps Report

Follow the procedure below to run the Configuration Steps Crystal report.

To run the Configuration Steps Crystal report:

1. Select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Reports, Configuration Steps.
2. Run the Configuration Steps Crystal report for CF Configuration ID: INSTALL_PRODUCT.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-6-2: Performing Manual Configuration Steps

These steps are outlined on the Configuration Steps report run in the previous step. These steps must be completed before using the system.

See *PeopleSoft Enterprise 9.0 Application Fundamentals PeopleBook* “Configuring ChartFields.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-7: Reviewing PeopleTools Functionality

The PeopleSoft Enterprise PeopleBooks detail the current PeopleTools functionality. There are many new features delivered in the new release that you may wish to use. You should now review the PeopleSoft Enterprise PeopleBooks and PeopleTools Installation Guide to configure your environment properly. This may include, but is not limited to, configuring and starting a process scheduler, report server, and reviewing portal settings.

See the Enterprise PeopleTools installation guide for your database platform on your new release.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

- If you applied a PeopleTools patch earlier in the upgrade, review the patch documentation and run any steps that you have not already performed during the upgrade. Check your Change Assistant output directory if you do not know whether a script was already run during the upgrade process.
- PeopleTools has updated the styles that define the look of the user interface. The classic (old) style sheet, as well as two new styles, are delivered with this release of PeopleTools. PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. After the PeopleTools portion of the upgrade, PeopleSoft sets the classic style as the default, but you can update to one of the new user interface styles.

See Appendix: “Changing the User Interface.”

Note. The new user interface styles are supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If you are using any other browser or release, the system uses the classic style as the default.

- PeopleTools uses Verity release 5.0 to implement free text search. Verity 5.0 is not compatible with the version of Verity that was used in previous PeopleTools releases. Check the necessary application patches that may be required in order to use the new version of Verity.

See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).

- Integration Broker was rewritten in PeopleTools 8.48. If you use Integration Broker, you will need to perform setup configuration and review the explanation of metadata mapping.

See Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-8: Preparing the Content Provider Registry

You should perform this task if you use Enterprise Portal 8.4 or higher running on PeopleTools 8.4x with full or partial navigation load access method. This means you do not use a single link to access your content provider databases, but instead you load some or all of the portal registry structures from the content provider database into your Enterprise Portal database. PeopleSoft refers to Content Provider databases as the application databases that contain the transaction content. Your Copy of Production database is your Content Provider database for this task.

When you upgrade a content provider database, the registry structures are updated, old registry structures are removed, and new registry structures are added. These changes need to be copied to the Enterprise Portal database by updating the portal registry structures in your Enterprise Portal database to match what is in the Content Provider database. Follow the detailed instructions in the appendix referenced below.

See Appendix: “Upgrading the Content Provider Registry.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-9: Updating the Portal Options Data

In this step you update the PeopleTools Portal Options data.

Note. Only perform this step if your upgraded database is on PeopleTools 8.46 or greater.

This step sets the portal options prefix and Owner ID. These values are used when creating Pagelet Wizard definitions and Navigation Collection objects.

To set the Portal Options Prefix and Owner ID:

1. From your browser, sign on to your New Copy of Production database.
2. Select PeopleTools, Portal, Portal Utilities, System Options.
3. Update the value for the Registry Object Prefix with a 1– to 4–character prefix that is unique to your organization.

Note. Do *not* use PAPP, PAPX, PAPQ, PAPI, PRTL, EO, or PT. Do *not* use any product line specific prefix (such as CR, HC, EP, or CI). Do *not* use a blank value.

4. Enter the Owner ID value with your organization's specific owner ID.

Note. The Owner ID is a translate value on the PeopleTools field OBJECTOWNERID. Do *not* use any delivered product Owner ID. If you do not have an Owner ID, then either create one, or leave the Owner ID value as a blank space.

5. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 5-10: Setting Country Codes

This section discusses:

- Understanding Country Codes

- Adding New Country Codes
- Modifying Existing Country Codes

Understanding Country Codes

PeopleSoft provides the 239 ISO 3166 compatible country codes as part of system data. However, PeopleSoft also provides an interface through which you can customize the country codes (either add new ones or modify existing ones). Since the COUNTRY_TBL record is considered system data, it was repopulated with the current countries as PeopleSoft has defined them. As a result, any additional countries you may have added and any other customizations you may have made to this table were deleted.

If you have customized country code entries, perform the following steps using the results from the SQL query in the task titled Reviewing Country Data.

See “Prepare Your Database,” Reviewing Country Data.

Task 5-10-1: Adding New Country Codes

Follow the steps below to add new country codes.

To add new country codes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Location, Country.
2. Select the Add a New Value tab.
3. Enter the new Country code and click Add.
4. Using the query results from the task Reviewing Country Data, enter the values for Description, Short Description and 2-Character Country Code.

If the country is a European Union member, select the EU Member State check box.

See “Prepare Your Database,” Reviewing Country Data.

5. Select the Address Format tab.
6. Indicate the labels you would like to have displayed to the users affiliated with this country.

The example below shows what is entered for USA.

Note. The Available check box indicates whether the label is available for displaying to the user.

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | Copy URL

Country Description | **Address Format**

Country: USA United States

Available	Label	Available	Label
☒ Address 1	Address 1:	☐ Number 1	
☒ Address 2	Address 2:	☐ Number 2	
☒ Address 3	Address 3:	☐ House Type	
☐ Address 4		☐ Field 1 Label	
☒ City	City:	☐ Field 2 Label	
☒ County	County:	☐ Field 3 Label	
☒ State	State:	☐ Postal Search	
☒ Postal	Postal:		

Save Return to Search Notify Add Update/Display

[Country Description](#) | [Address Format](#)

Address Format page

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-10-2: Modifying Existing Country Codes

In this step, you modify your existing country codes.

To modify existing country codes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Location, Country.
 2. Enter the country code you wish to modify and click Search.
 3. Update the necessary fields based on the query results from the task, "Reviewing Country Data."
- See "Prepare Your Database," Reviewing Country Data.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-11: Completing Credit Card Encryption

This section discusses:

- Understanding Credit Card Encryption
- Reviewing Credit Card Encryption Status
- Running Credit Card Encryption

Understanding Credit Card Encryption

In this task you must upgrade your existing credit card data. First, you must ensure that your credit card data has already been encrypted.

Task 5-11-1: Reviewing Credit Card Encryption Status

Before running credit card encryption, you must check to see if the credit card data has already been encrypted as part of a release bundle applied to an earlier release.

To check to see if the credit card data has been encrypted:

1. Select Set Up Financials/Supply Chain, Upgrade, Upgrade Credit Card Numbers.
2. Add a Run Control ID.
3. If the generate random key button is disabled, it means that some of the data has already been converted.

This could be the result of implementing a bundle containing the new encryption functionality, or by previously performing a partial upgrade conversion. In this case, the encryption key has already been set and the existing data has been encrypted with it, so you will not be able to generate a new key.

4. If the key is disabled, skip the following step “Running Credit Card Encryption”.
5. If the key is active, complete the rest of this task.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-11-2: Running Credit Card Encryption

In the new PeopleSoft release, a stronger credit card encryption has been provided. Therefore, all stored credit card numbers within the system must be upgraded to use the triple-DES algorithms and 168-bit encryption keys.

To complete credit card encryption upgrade:

1. Select Set Up Financials/Supply Chain, Upgrade, Upgrade Credit Card Numbers.
2. Click the Generate Random Key button.

Note. If this button is disabled, it means that some of the data has already been converted, probably as the result of implementing a bundle containing the new encryption functionality, or by previously performing a partial upgrade conversion. In this case, the encryption key has already been set and the existing data has been encrypted with it, so you will not be able to generate a new key.

3. Click the Run button.

This will either encrypt or re-encrypt each field in the grid depending on the state of the current value.

4. Once all values are set to *No Action* the upgrade has completed.

Note. If the process fails for any reason, or you see values other than *No Action*, after it completes, you can restart the process by using the Process Scheduler Restart functionality and it will pick up where it left off. If for any reason you cannot restart the process this way, you can start the process from the beginning by clicking Run on this page. It will bypass any value that has already been processed.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-12: Rebuilding Verity Search Indexes

In this task, you rebuild your Verity search indexes.

Note. In this PeopleSoft release, the indexes CS_DOCUMENTS_ADH and CS_DOCUMENTS_PO have been combined into one index, CS_DOCUMENTS. You may need to update your application server and process scheduler configurations to reflect this change.

To rebuild Verity search indexes:

1. Select Set Up Financials/Supply Chain, Common Definitions, Search Indexes, Build Search Index.
2. Add a run control/index combination for every index you want to rebuild, if a run control does not exist.

3. Submit the process with build option Create New/Rebuild.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-13: Reconciling Notification Templates

In this task you will reconcile any updates to component and generic notification templates with changes you may have made to customize these templates. You should review the notification text and variables.

To access component notification template information, select PeopleTools, Workflow, Notifications, Notification Templates.

To access component notification template variables, select PeopleTools, Workflow, Notifications, Template Variables.

To access generic template information, navigate to PeopleTools, Workflow, Notifications, Generic Templates.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-14: Reviewing Approval Workflow Framework

The approval workflow framework has been enhanced in the new PeopleSoft release to offer more scalability. As a result, there have been some changes to how approval processes are defined and the performance of the approval workflow engine. If your product uses the approval workflow framework, review the following reference and, if applicable, any product-specific PeopleBook documentation regarding your use of the framework.

See PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook, “Using Workflow and Managing Approvals”.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-15: Completing Promotions

This section discusses:

- Updating Tree Statistics

Task 5-15-1: Updating Tree Statistics

Follow the steps below to optimize the performance of your Product Tree structures.

To optimize Trees:

1. Select Set Up Financials/Supply Chain, Product Related, Promotions Management, Update Tree Statistics.
2. Create a run control ID if needed.
3. Add a row for every setID/Customer Tree and setID/Product Tree combination in your system.
4. Click Run to submit the update process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Promotions Management	All	All

Task 5-16: Completing Billing Setup

This section discusses:

- Creating Recommended Manual Indexes
- Defining Payment Terms for Paid Invoices

Task 5-16-1: Creating Recommended Manual Indexes

Billing has published recommended index modifications that may apply to your installation. These index options are dependent on your installation and therefore cannot be included in the delivered application. You can find the latest information posted on Customer Connection for report ID 1556219000.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 5-16-2: Defining Payment Terms for Paid Invoices

There is a new option defined at the Billing business unit level that allows you to define a payment term for invoices that are fully paid and that do not have a discount for early payment. This ensures that the discount for early payment is not applied during the Accounts Receivable payment application process. If you do not define a payment term, it could result in outstanding credits in Accounts Receivable.

To define the payment term:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Billing, Billing Options.
2. Enter a setID value.
3. Enter a value in the field Pay Terms for Fully Paid Bill from the prompt list.
4. Repeat steps 2 and 3 for every valid setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 5-17: Configuring Order Management

This section discusses:

- Repricing Orders with Product Kits
- Adding Order Source Codes
- Defining AutoNumbering for Reservation Backorder
- Defining AutoNumbering for Alternate Sources of Supply
- Defining Default Hold Reason Code
- Defining Hold Code Security by Role

Task 5-17-1: Repricing Orders with Product Kits

In this PeopleSoft release, product kit components and configured kit components are now considered in estimated shipment/freight calculations. For existing sales orders with product kit components, the shipping weight and volume and quantity fields were calculated as part of data conversion. However, the estimated shipment/freight was not automatically upgraded as this may have a financial impact to previously quoted sales orders. To obtain the correct estimated shipment/freight calculation for existing product kits, the orders will need to be repriced online or via the batch job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-17-2: Adding Order Source Codes

In this PeopleSoft release, Vendor Managed functionality has been added to Inventory and those generated orders will be identified by a source code value of *VMI*. You will need to update the order source codes to include *VMI* as a valid source code if you have not done so already.

To add source codes values to the source code table:

1. Select Set Up Financials/Supply Chain, Product Related, Order Management Foundation, Order Source Codes.
2. Add the source code *VMI* as follows:
 - a. For each setID, enter *VMI* in the Source Code field.
 - b. Click Add.
 - c. Enter *01/01/1900* as the Effective Date.
 - d. Enter *Vendor Managed Inventory Orders* for the description.
 - e. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-17-3: Defining AutoNumbering for Reservation Backorder

This section discusses:

- Understanding Reservation Backorder Auto-Numbering
- Setting Up Auto-Numbering for Reservation Backorder Plans
- Setting Up Auto-Numbering for Reservation Backorder Rules

Understanding Reservation Backorder Auto-Numbering

You can choose how to fulfill your orders using reservation backorder rules and plans. If you want to auto-number these plans and rules, rather than defining them explicitly, set up the automatic numbering scheme for each type. Use the following steps to set up rules and plans.

Setting Up Auto-Numbering for Reservation Backorder Plans

To verify and set up auto-numbering for reservation backorder plans:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.

2. For Number Type, select Back Order / Reservation Plan.
3. Click Search.

If no data is returned, you do not have auto-numbering set up for reservation backorder plans.

4. To set up auto-numbering for Reservation Backorder plans:
 - a. Click Add a New Value.
 - b. Enter a valid setID.
 - c. For Field Name, select TRFT_RULE_CD
 - d. Enter a three-character value in the Start Seq field.
 - e. Add values for Max Length, Description and Last Number Issued.
 - f. Select the Default option.
 - g. Save the auto-numbering rule, if applicable.
 - h. Repeat these steps for every setID.

Setting Up Auto-Numbering for Reservation Backorder Rules

To verify and set up auto-numbering for reservation backorder rules:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
 2. For Number Type, select Back Order / Reservation Rule.
 3. Click Search.
- If no data is returned, auto-numbering is not set up for reservation backorder rules.
4. To set up auto-numbering for Reservation Backorder Rules:

- a. Click Add a New Value.
- b. Enter a valid setID.
- c. For Number Type, select Back Order / Reservation Rule.
- d. Click Add.
- e. For the Field Name, select *TRFT_SET_ID*.
- f. Enter a three-character value in the Start Seq field.
- g. Enter values for Max Length, Description, and Last Number Issued.
- h. Select the Default option, if applicable.
- i. Save the auto-numbering rule.
- j. Repeat these steps for every setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-17-4: Defining AutoNumbering for Alternate Sources of Supply

This section discusses:

- Understanding Alternate Source of Supply Auto-Numbering
- Setting Up Auto-Numbering for Supply Plans
- Setting Up Auto-Numbering for Alternate Sources of Supply Rules

Understanding Alternate Source of Supply Auto-Numbering

You can choose to source your orders based on purchase order, requisition, material stock request, or production order. To determine how to source your orders, you need a sourcing arbitration plan. To control what sources are available to your orders, you need defined sourcing rules. If you want to auto-number these plans and rules (rather than explicitly defining names for them), set up the automatic numbering scheme for each type (plans and rules).

Complete the steps below to set up and verify your auto-numbering schemes.

Setting Up Auto-Numbering for Supply Plans

To verify and set up auto-numbering for alternate sources of supply plans:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. For Number Type, select Alt Source of Supply Plan.
3. Click Search.

If no data is returned, you do not have auto-numbering set up for Alternate Sources of Supply Arbitration Plans.

4. To set up auto-numbering for Alternate Sources of Supply Arbitration Plans:
 - a. Click Add a New Value.
 - b. Enter a valid setID.
 - c. For Number Type, select Alt Sources of Supply Plan.
 - d. Click Add.
 - e. For the Field Name, select TRFT_RULE_CD.
 - f. Enter a three-character value in the Start Seq field.
 - g. Enter values for Max Length, Description, Last Number Issued.
 - h. Select the Default option.
 - i. Save the auto-numbering rule, if applicable.
 - j. Repeat the steps for each setID.

Setting Up Auto-Numbering for Alternate Sources of Supply Rules

To verify and set up auto-numbering for Alternate Sources of Supply Rules:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. For Number Type, select Alt Sources of Supply Rule.

3. Click Search.

If no data is returned you do not have auto-numbering set up for Alternate Sources of Supply Rules.

4. To set up auto-numbering for Alternate Sources of Supply Rules:

- a. Click Add a New Value.
- b. Enter a valid setID.
- c. For Number Type, select Alt Sources of Supply Rule.
- d. Click Add.
- e. For the Field Name, select TRFT_SET_ID.
- f. Enter a three-character value in the Start Seq field.
- g. Enter values for Max Length, Description, Last Number Issued.
- h. Select the Default option.
- i. Save the auto-numbering rule, if applicable.
- j. Repeat these steps for each setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-17-5: Defining Default Hold Reason Code

This section discusses:

- Defining a Hold Reason Code
- Setting the Hold Reason Code as Default

Defining a Hold Reason Code

A default hold reason code value must be set for automation hold processing for each Order Management business unit. This user-defined default value is used whenever a system generated hold code is applied. Before the default value can be set, the reason code value must be added to the list of valid reason codes.

See PeopleSoft Enterprise Order Management 9.0 PeopleBook, Setting Up PeopleSoft Order Management Business Units, Setting Up Order Management Business Units, Establishing Hold Processing.

To add a new reason code value:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes.
2. Select the Add a New Value tab.
3. Enter a setID value.
4. Select Reason Type Order/Quote Hold.
5. Enter a value for Reason Code.
6. Click Add.

7. Enter an effective date and description.
8. Click Save.
9. Repeat steps 4 through 8 for every valid setID.

Setting the Hold Reason Code as Default

After at least one Order/Quote Hold reason code has been added, you can set the default value on the Order Management business units.

To set the default hold reason code:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Order Management, Order Management Definition.
2. Enter an Order Management business unit.
3. Click Search.
4. Click the Hold Processing link at the bottom of the page.
5. In the Automatic Hold box, select a value for the Hold Reason Code field.
6. Click Save.
7. Repeat steps 2 through 6 for every valid business unit.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-17-6: Defining Hold Code Security by Role

In prior releases, there was no security surrounding the application or removal of holds associated with quotes and orders. Now you must assign hold codes to user roles to control what holds a role can manage.

See PeopleSoft Enterprise Order Management 9.0 PeopleBook, Implementing PeopleSoft Order Management, Implementing Order Management Options, Defining Hold Code Security by Role

To add a hold code to a user role:

1. Select Set Up Financials/Supply Chain, Security, Hold Security by Role.
2. Click the Add a New Value tab.
3. Enter a setID.
4. Enter a Role Name.
5. Click Add.
6. Add a row for each hold code value that the role can manage.
 - a. Check the Add Authority check box if the role has the authority to add quote and order holds.
 - b. Check the Release Authority check box if the role has the authority to release quote and order holds.

- c. Check the Delete OM Hold check box if the role has the authority to delete quote and order holds.
7. Click Save.
8. Repeat steps 3 through 7 for each valid setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-18: Configuring Attachments

This section discusses:

- Understanding Attachments
- Configuring an Attachment Server
- Converting Order Management Attachments

Understanding Attachments

The attachment handling functionality for Order Management has changed in this release to utilize more of the built-in PeopleTools attachment functionality. The URL Maintenance functionality is no longer used for these products. If you used attachments prior to this upgrade, you will need to perform some additional configuration to enable the new functionality.

Task 5-18-1: Configuring an Attachment Server

If you use attachments with other products, you may already have servers set up as a result of the upgrade. You need to confirm that a server has been selected as your default server and that your attachments reside on that server. If you did not use attachments with other products, you have two choices; you can either configure an FTP server to store your attachments, or you can have your attachments stored within the database (referred to as the database server below).

To review or configure a defined attachment server, select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments. Your defined servers will appear on this page if they have already been defined. You can choose to use any of the servers as your attachment server. If you choose an FTP server, you will need to move your attachments from their current location to the PATHNAME indicated on the page for the FTP server. Alternatively, you could configure your current attachment location as an FTP server (a task your system administrator should help you with).

If you do not have any servers defined, you may choose to define an FTP server or a database server as your attachment server. If you choose the database server, the remaining information appears by default when you add it to the list. There is no additional configuration required. If you choose an FTP server, you will need to know information such as the FTP user name and password, the FTP server name, and the FTP directory location if it is not where the FTP login immediately defaults to. This information should be obtainable from your system administrator.

Once your servers are defined, choose one server to be the Active Server. The Active Server is used as the location for any new attachments after the upgrade is completed. Note that this only affects attachments from this point forward. Any previously attached files will continue to be accessed from the server on which they were stored.

Note. The term “Active Server” is used to define the specific server that can now create attachments. Other servers may be operational and can be utilized for retrieving existing attachments.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-18-2: Converting Order Management Attachments

This section discusses:

- Understanding Converting Attachments
- Converting Remaining Attachments

Understanding Converting Attachments

In this step, you run a report that returns any converted attachments with invalid file names that contain illegal characters. You are provided with a set of manual steps to convert invalid file attachments to the new naming conventions. This report also updates information about the successfully converted attachments used by the file attachment utility based on the server information you have created for your Active Server.

The following subdirectories are tied to the indicated Order Management components and indicate where the attachments for those components will reside on your Active Server. You must migrate your attachments to their appropriate locations on the Active Server for these attachments to be accessible within the online system.

Component	Description	Subdirectory
CUST_ATT	Customer Attachments	Customer
ORDENT_FORM	Order Entry Form	SalesOrder
PROD_ATT	Product Attachments	Product
RMA_FORM	RMA Header	RMA
SCON_HDR_ATT	Buying Agreement Header Attachment	BuyingAgreement
SCON_LINE_ATT	Buying Agreement Line Attachment	BuyingAgreement

Converting Remaining Attachments

To convert remaining attachments:

1. Select Set Up Financials/Supply Chain, Upgrade, Create Upgrade Reports.
2. Run the Attachment Exceptions report, UVEPP105.SQR.

The report lists the name of the converted attachment and the invalid file name.

3. For every entry in the report, follow the appropriate steps below.
4. For Buying Agreements, select Order Management, Buying Agreements, Create/Update Buying Agreement.
 - a. Select the Find an Existing Value tab.
 - b. Enter the SetID and Buying Agreement ID provided in the report and click Search.
 - c. For Buying Agreement Header Attachments, select the Attachments link from the Header Menu drop-down list to access Header Attachments.
 - d. For Buying Agreement Line Attachments, select the line number provided in the report and then select the Attachments link from the Line Menu drop-down list to access Line Attachments.
5. For Customers, select Customers, Customer Information, General Information.
 - a. Select the Find an Existing Value tab.
 - b. Enter the SetID and Customer ID provided in the report and click Search.
 - c. Select the Attachments link from the General Info Links drop-down list to access Attachment Information.
6. For Orders, select Order Management, Quotes and Orders, Create/Update Order.
 - a. Select the Find an Existing Value tab.
 - b. Enter the business unit and order number provided in the report and click Search.
 - c. For Order Header Attachments, select the Notes/Attachments link from the Header Menu drop-down list to access Header Notes/Attachment.
 - d. For Order Line Attachments, select the line number provided in the report and then select the Notes/Attachments link from the Line Menu drop-down list to access Line Notes/Attachment.
 - e. For Order Schedule Attachments, select the line number provided in the report and then select the Shipment Schedules hyperlink.
 - f. Select the schedule number provided in the report.
 - g. Select the Notes/Attachments link from the Schedule Menu drop-down list to access Schedule Notes/Attachment.
7. For Products, select Products, Identify Product Details, Attachments.
 - a. Enter the SetID and Product ID provided in the report.
 - b. Click Search.
8. For RMA, select Customer Returns, Create/Update RMA.
 - a. Select the Find an Existing Value tab.
 - b. Enter the business unit and RMA number provided in the report and click Search.
 - c. For RMA Header Attachments, select the Header Notes/Attachments hyperlink to access RMA Header Notes/Attachments.
 - d. For RMA Line Attachments, select the RMA Line hyperlink for the line number provided in the report.
 - e. Select the Line Notes/Attachments hyperlink to access RMA Line Notes/Attachments.

9. Modify the invalid entry to a valid filename.
10. Save the page.
11. Rename the attachment to match the name you updated on the attachments page.
12. Migrate the attachment to the attachment server using the table in the previous step as a guideline for where the attachment should be located.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Order Management	All	All

Task 5-19: Completing Strategic Sourcing Setup

This section discusses:

- Defining User Lists for Event and Plan Approvals
- Defining Sourcing Approval Processes
- Defining Auto Numbering for Sourcing Plan ID

Task 5-19-1: Defining User Lists for Event and Plan Approvals

A plan approval process has been introduced in the new PeopleSoft release. You must use this process if you are creating and submitting any sourcing plans. You also need to re-create your user list definition for the Event Approval process. You must complete this step before defining the Event and Plan Approval processes in the next step.

To define a user list:

1. Select Set Up Financials/Supply Chain, Common Definitions, Approvals, Maintain User List.
2. Add a user list called *Event Approver* if it does not already exist.

User List Definition

User List: Event Approver

*Description: Sourcing Event Approver

User List Source

☒ Role Role Name: Event Approver

☐ SQL Definition

☐ Query

☐ Application Class

User List Definition page

3. Enter a description if it does not already exist.
4. Select the Role radio button.
5. Enter Event Approver or a custom role name you have created for your organization in the Role Name field.
6. Click Save.
7. Repeat steps 1 through 6 substituting *Plan Approver* for *Event Approver*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Strategic Sourcing	All	All

Task 5-19-2: Defining Sourcing Approval Processes

Once you have defined your approval user lists, you need to create approval process definitions to which these user lists will be associated. In this step, you will define the approval process definitions which utilize the user lists created in the previous step.

Note. You need to create approval process definitions for each default setID corresponding to a Sourcing business unit.

To define the Event Approval process definition:

1. Select Set Up Financials/Supply Chain, Common Definitions, Approvals, Set Up Process Definitions.
2. Add a new approval process definition for each setID.

This approval process ID must be *Event Approval* and the Definition ID must be the setID you are creating the approval process for in order for the event submittal process to work. However, the criteria information may be customized to fit your business needs. You may define different approval criteria for paths and steps. You may or may not want to define a criteria at each and every level, depending on your business process.

Setup Process Definitions page

3. Enter the Admin Role.
4. Click the Definition Criteria link to update Criteria Type.

Criteria Definition page

5. Click OK to return back to the Setup Process Definitions page and then click Save.
6. In the Paths section, click on the Path Details link to add path information if any.
7. Click the Criteria link to add the criteria for the approval path, if any.
8. Click OK to return back to the Approval Path Definition page.
9. Click OK button to return to the Setup Process Definitions page and then click Save.
10. In the Steps section, click on the Step Details link to add approval step details.
11. Click the Criteria link to enter the approval criteria for the step.
12. Click OK to return to the Approval Step Definition page.
13. Click OK to return to the Setup Process Definitions page and then click Save.
14. To insert additional stages, paths or steps, click the add (+) button related to the appropriate section and repeat steps 4 through 13 to add details and criteria where needed.
15. Create the *Plan Approval* process definition by repeating steps 1 through 14 substituting Plan Approval for Event Approval.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Strategic Sourcing	All	All

Task 5-19-3: Defining Auto Numbering for Sourcing Plan ID

Complete the steps below to set up and verify your auto-numbering schemes for sourcing plans.

To verify and set up auto-numbering for sourcing plans:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. For Number Type, select Sourcing Plan ID.
3. Click Search.

If no data is returned, you do not have auto-numbering set up.

4. To set up auto-numbering:
 - a. Click Add a New Value.
 - b. Enter a valid setID.
 - c. For Number Type, select Sourcing Plan ID.
 - d. Click Add.
 - e. For the Field Name, select AUC_PLAN_ID.
 - f. Enter a three-character value in the Start Seq field.
 - g. Enter values for Max Length, Description and Last Number Issued.
 - h. Select the Default option.
 - i. Save the auto-numbering rule.
 - j. Repeat the steps for each setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Strategic Sourcing	All	All

Task 5-20: Completing Services Procurement Setup

This section discusses:

- Understanding the sPro Upgrade
- Running the PostUpgrade sPro Queries

- Reviewing the PostUpgrade sPro Queries
- Activating HCM Integration in sPro
- Defining Default Business Unit
- Defining Requester Defaults
- Defining Service Coordinator Defaults
- Adding Replacement Work Order Approval
- Setting Auto Numbering for Timesheets
- Setting Auto Numbering for Progress Logs
- Reconciling Notification Templates
- Reviewing Time and Progress Log Templates
- Reviewing Vendor Setup Information

Understanding the sPro Upgrade

In this release, expenses have been decoupled from time. Additionally, work order amounts are now broken into labor and expense amounts for better tracking against tolerance checks. For customers upgrading from prior releases, tolerance checking is still based on the total work order amount. Furthermore, where expenses have been entered, users navigating to the work order page will see a message saying “Expense Amount Not Available” because the data conversion process is not able to determine how much should be allocated to labor versus expenses for tolerance checking purposes.

The display of requisition and work order skills matrix/competencies information has changed in this release. For existing transactions, the competencies will be displayed and stored in the long text field and the skills matrix grid will be blank. For new transactions, all the competencies will be stored in the skills matrix grid.

Work order will track distributions by percentage or actual allocation in the new release. During the upgrade process, a default value Percent Allocation was automatically assigned to all existing work orders in order for you to continue to use your existing transactions going forward.

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*.

Task 5-20-1: Running the PostUpgrade sPro Queries

In this step, you run the Services Procurement post-upgrade queries.

To run the post-upgrade queries:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following queries:

```
sPro Time Template for OT Rules, UPG_SPQ707
sPro Time Template Calendars, UPG_SPP708
sPro Activity by Service Type, UPG_SPP710
sPro Activities by Service, UPG_SPQ711
sPro Service Activities, UPG_SPP714
sPro Service Activity X-Ref, UPG_SPP715
sPro WO Approval Process, UPG_SPP716
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-2: Reviewing the PostUpgrade sPro Queries

This section discusses:

- Reviewing Query UPG_SPQ707
- Reviewing Query UPG_SPP708
- Reviewing Query UPG_SPP710
- Reviewing Query UPG_SPQ711
- Reviewing Query UPG_SPP714
- Reviewing Query UPG_SPP715
- Reviewing Query UPG_SPP716

Reviewing Query UPG_SPQ707

This report lists all the time templates that use Overtime. The previously existing overtime rules will no longer be used. Use the output of this query in conjunction with query UPG_SPP708 results to recreate new time reporting rules in the “Reviewing Time and Progress Log Templates” task.

See the reference below for more information on creating and setting up overtime rules.

See *PeopleSoft Services Procurement 9.0 PeopleBook*

Reviewing Query UPG_SPP708

This report lists all the time reports grouped by time reporting period. Use this information to create calendars and time reporting rules, and attach them to the appropriate time templates in the “Reviewing Time and Progress Log Templates” task. All new time reporting transactions require this setup.

Reviewing Query UPG_SPP710

This is an informational report that lists the activities by service type that were added as part of the upgrade process for customers who are not integrated with Project Costing. Prior to this release, project activities were used in the timesheets. Now, non-project activities need to be defined and mapped to service types. The upgrade process converted all the existing activities on timesheets to activities by service type.

Reviewing Query UPG_SPQ711

This is an informational report that lists the activities by service that were added as part of the upgrade process. Prior to this release, project activities defined as Milestone were used to create deliverables-based work orders with a settlement option of Milestone. Now, milestone activities are defined in Services Procurement and are associated with a service. These activities are then used by work orders. The upgrade process inserted milestone activities used by the work order into activities by service for the service used by the work order.

Reviewing Query UPG_SPP714

This report is an informational report that lists all of the service activities defined in the system. In your prior release, resource-based activities were defined as project activities for Services Procurement customers who are not integrated with Project Costing. Similarly, deliverables-based activities with settlement option of Milestone, were also defined as project activities.

These activities are now defined in Services Procurement as service activities. The upgrade process inserted these original activities into the services activities table with new activity IDs to avoid possible duplicates. This report lists the new activity ID along with the original activity description. You can use the results of this query along with the results from query UPG_SPP715 to cross-reference the new service activities with the original project activities.

Reviewing Query UPG_SPP715

This is an informational report mapping the old project activity IDs to the new service activity IDs that were created during the upgrade process.

You can use the results of this query along with the results from query UPG_SPP714 to cross-reference the new service activities with the original project activities.

Reviewing Query UPG_SPP716

This report lists the setIDs for which work order approval process definitions must exist.

You will use the results of this query to create work order approval process definitions in the “Defining Work Order Approval Process” task.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-3: Activating HCM Integration in sPro

This task applies to customers who currently use or will be using Services Procurement with PeopleSoft Enterprise Human Capital Management (HCM) integration. If you are using Services Procurement and do not plan to integrate with HCM, you may skip this task.

Services Procurement is now integrated with HCM to utilize common employee and job information. If you are currently using Services Procurement and HCM *and* you want to take advantage of the sPro/HCM integration features after the upgrade is complete, you will need to review or update HCM-related fields on your existing requisitions and work orders as described in this step.

For existing requisitions, you have two options:

- Leave the HCM fields blank for existing requisitions as these can be overridden or filled when a work order is created or submitted. There is no impact even if you check the HCM Person Integration option on the Services Procurement Installation Options page after the upgrade.
- Fill in the HCM fields on existing requisitions through scripts. PeopleSoft is unable to provide scripts as many of the HCM fields are business unit-dependent and certain fields are regulated by region.

In addition, for existing work orders, if the HCM integration is switched on after upgrade:

- You will be asked to fill in the required HCM fields when submitting work orders if existing work orders are in open status and are not yet submitted.
- You will need to update the HCM fields on the SPF_WORDERREC_1 table through your own custom scripts if existing work orders have been submitted or approved. When a work order is released, a check is made to see if the HCM flag is on. If it is on, then a message is published to HCM when a work order is released. Because there is no HCM data, HCM will return an error.
- Finally, you will also need to take action on work orders that have already been released as there are no corresponding Person and Job entries in HCM for the service provider associated with the work order. These work orders can be reassigned, replaced or cancelled, or closed or terminated. Services Procurement sends messages to HCM when these actions happen. However, you will need to manually create the HCM Person and Job entries and then update the SPB_PERSON_TBL table, the SPF_WORDERREC_1 table (for resource-based work orders), or the SPF_WO_TRK_RSRC table (for deliverable-based work orders).

See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-4: Defining Default Business Unit

If you have previously defined a default business unit for your users, you may skip this step. A default business unit is used throughout Services Procurement to derive setIDs for certain setup data or transactions. In order to select a service type while defining service requester or service coordinator defaults, a default business unit must first be defined in the user preferences. If you have not defined a default business unit for your users, it is highly recommended that you do so.

To define a default business unit:

1. Select Services Procurement, Maintain Users, Maintain User Preferences.
2. Enter the User ID whose preferences you want to modify and click Search.
3. Click the Overall Preference link.
4. Enter a default business unit.
5. Click Save.
6. Repeat for each user.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-5: Defining Requester Defaults

A Service Requester may have certain information that does not vary often when creating requisitions and work orders. Defining requester defaults will auto-populate the requester's most commonly used information on the work order and requisition at create time. This step has you define those defaults.

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*.

To define requester defaults:

1. Select Services Procurement, Maintain Users, Service Requester Defaults.
2. Enter the Requester's User ID of the user you wish to update.
3. If a Service is defined without a Service Type, select the Service Type applicable for the Service.
4. Select the May Enter Work Order and May Extend Work Order check boxes to allow the user to add new work orders.
5. Select the Authorized to Source to Preferred Suppliers check box if user is authorized to do so.
6. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-6: Defining Service Coordinator Defaults

A Service Coordinator may have certain information that does not vary often when creating work orders. Defining service coordinator defaults will automatically enter the service coordinator's most commonly used information on the work order when it is created. In this step, you define those defaults.

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*.

To define service coordinator defaults:

1. Select Services Procurement, Maintain Users, Service Coordinator Defaults.
2. Enter the Service Coordinator's User ID of the user you want to update.
3. Enter the information to be defaulted when creating a work order.
4. If a Service is defined without a Service Type, select the Service Type applicable for the Service.
5. Enter the Notification options.
6. Select the May Enter Work Order or May Extend Work Order check boxes to allow the user to add or extend work orders.
7. Select the Authorized to Delegate check box if the user is authorized to do so.
8. Select the Authorized to Change Sourcing Rules check box if the user is authorized to do so.
9. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-7: Adding Replacement Work Order Approval

The replacement work order approval process is new in this PeopleSoft release. In this step, you will add a replacement work order process definition and associate it with the approval user list you previously created in your prior PeopleSoft release. Evaluate the results from query UPG_SPP716 to determine the setIDs for which new work order approval process definitions should be created. You need to create new approval process definitions for only those setIDs that do not have an existing approval process. Do not create new approval process definitions for those setIDs that already have one. Instead, follow the steps below if you are updating an existing approval process definition.

To add the replacement work order stage to an existing SP_WORKORDER approval process:

1. Select Set up Financials/Supply Chain, Common Definitions, Approvals, Setup Process Definitions.
2. Select the most current effective-dated SP_WORKORDER
3. Save the approval process definition with a new effective date.

See the example below:

Setup Process Definitions

Definition Criteria | Alert Criteria | Save As | Approval Process Viewer | Preview

Process ID: SP_WORKORDER *Admin Role: SP_ADMINISTRATOR ☐ Default Process Definition

Definition ID: US001 *Status: Active ☒ User Auto Approval

Effective Date: 01/01/1900 Priority: 1 ☐ Route to Requester

Description:

Stages Find | View All First 1 of 3 Last

*Stage Number: 1 Description: Replace Work Order

Paths Find | View All First 1 of 1 Last

Description: Replace Work Order *Source: Static Details Criteria

Steps Customize | Find | View All First 1 of 1 Last

Description	Approver User List	Details	Criteria
10 Approver	WorkOrder Approver		

Expand/Collapse All

Setup Process Definitions page

4. Add a new stage.
5. Click the Alert Criteria link to add criteria for alerts.

Criteria Definition

*Criteria Type: User Entered

☒ All Criteria Needed to Satisfy

▼ User Entered Criteria Find | View All | First 1 of 1 Last

Description: Replace Work Order

▼ Field Criteria

Record: SPF_WORDERREC Field Name: SP_WO_TYPE

	*Criteria Operator	Value	Value
1	Equals	P	

▼ Monetary Criteria

Amount Record: SPF_WORDERREC Amount Field: POAMOUNT

Currency Field: CURRENCY_CD

Operator: Greater Than

Amount: 1,000.000 Amount:

Currency Code: USD

Rate Type: CRRNT

OK Cancel Apply

Criteria Definition page

- Click the OK button to return back to the Setup Process Definitions page and click Save.
- In the Paths section, click the Paths Details link to add path information.

Approval Path Definition

 [Criteria](#)

Approval Path: 1

*Step Source:

Description:

Long Description:

☐ Skip Prior Steps for Requester

Timeout Options					Customize	Find	First 1 of 1 Last	
	*Escalate Option	Hours	Days	Reassign To	User List			
1	Notify Participant							

Approval Path Definition page

- Click the Criteria link to add the criteria for the approval path, if any.

Criteria Definition

*Criteria Type: User Entered

☒ All Criteria Needed to Satisfy

▼ User Entered Criteria Find | View All | First 1 of 1 Last

Description: Replace Work Order

▼ Field Criteria

Record: SPF_WORDERREC Field Name: SP_WO_TYPE

	*Criteria Operator	Value	Value
1	Equals	P	

▼ Monetary Criteria

Amount Record: SPF_WORDERREC Amount Field: POAMOUNT

Currency Field: CURRENCY_CD

Operator: Greater Than

Amount: 1,000.000 Amount:

Currency Code: USD

Rate Type: CRRNT

OK Cancel Apply

Criteria Definition page

9. Click the OK button to return to the Approval Path Definition page.
10. Click OK.
11. In the Steps section, click the Steps Details link to add approval step details.

Approval Step Definition

 [Criteria](#) |  [Self-Approval Criteria](#)

Sequence Number: 10

Description:

Approvers

Approver User List:

Approver Role Name:

Approver Requirements

☐ All Approvers Required

☒ Some Approvers Required Number of Approvers Needed:

Approver Requirements

☐ Self Approval

Reviewers

Reviewer User List:

Approval Step Definition page

- Click the Criteria link to enter the approval criteria for the step.

Criteria Definition

*Criteria Type: User Entered

☒ All Criteria Needed to Satisfy

User Entered Criteria Find | View All First 1 of 1 Last

Description: Replace Work Order

Field Criteria

Record: SPF_WORDERREC Field Name: SP_WO_TYPE

	*Criteria Operator	Value	Value
1	Equals	P	

Monetary Criteria

Amount Record: SPF_WORDERREC Amount Field: POAMOUNT

Currency Field: CURRENCY_CD

Operator: Greater Than

Amount: 1,000.000 Amount:

Currency Code: USD

Rate Type: CRRNT

OK Cancel Apply

Criteria Definition page

13. Click the OK button to return to the Approval Step Definition page.
14. Click OK.
15. Change the status of the approval process definition to *Active*.
16. Click Save to save your process definition.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-8: Setting Auto Numbering for Timesheets

If you have not already done so, set up the automatic numbering scheme for the Services Procurement Timesheet number type.

To set up auto-numbering:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. Enter a valid setID and select Services Procurement Timesheet as the number type.
3. Click Add a New Value.

4. For the Field Name, select the default *TIME_SHEET_ID*.
5. Enter the start sequences, maximum length, description, and last number issued information.
6. Click Save.
7. Repeat steps 2 through 6 for every setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-9: Setting Auto Numbering for Progress Logs

If you have not already done so, set up the automatic numbering scheme for the Service Progress Logs number type.

To set up auto-numbering:

1. Select Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.
2. Enter a valid setID and select Service Progress Logs as the number type.
3. Click Add a New Value.
4. For the Field Name, select the default *PLOG_ID*.
5. Enter the start sequences, maximum length, description, and last number issued information.
6. Click Save.
7. Repeat steps 2 through 6 for every setID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-10: Reconciling Notification Templates

The notification templates for the following components have been modified:

- SPF_BID
- SPF_BIDRESPONSE
- SPF_CBID_RSP_COMP
- SPF_CLIBID_COMP
- SPF_CBID_RSP_COMP
- SPF_RBID_RSP_COMP

- SPF_SUBMITTAL
- SPF_INV_APPROVE
- SPF_INV_MANAGE
- SPF_REQ_LN_STTS – Templates FILLED and CANCEL2

The notification templates for the following components are new:

- SPA_APR_ROSTER
- SPA_EXP_APR_ROSTER
- SPA_EXPENSE2
- SPA_MANAGE_PLOGS
- SPA_TIME (replaces SPS_TIME_ENTRY2)
- SPA_TIME_APPROVAL
- SPF_DEFN_REQ_RATES
- SPF_WO_APPR_CMP
- SPF_WORDER_ROSTER
- SPF_WORK_ORDER_CMP (replaces SPF_WORDERCOMP)

Reconcile the notification template text and the notification template variables for the components mentioned above.

To access the notification template information:

1. Log in as Administrator.
2. Select PeopleTools, Workflow, Notifications, Notification Templates.

To access the notification template variable information:

1. Log in as Administrator.
2. Select PeopleTools, Workflow, Notifications, Template Variables.

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-11: Reviewing Time and Progress Log Templates

This section discusses:

- Updating Set Control Value for Time Template Record Group
- Creating Calendars for Time Reporting
- Creating Time Reporting Rules

- Associating Calendars and Rules to Time Templates

Updating Set Control Value for Time Template Record Group

In the current release, the Services Time Reporting feature was enhanced to meet a broader set of reporting needs. SetID rather than business unit now groups time templates. Existing service templates were modified during the upgrade to convert business units to setIDs. Evaluate the results from the pre-upgrade query, UPG_SPP706, against the upgraded data to ensure that your service templates meet your requirements. For each business unit that was converted to a setID as identified in the query, you will need to manually change the setID for the service time templates record group (SP_12) to be the same as the set control value.

To manually change the setID for each converted business unit:

1. Log in as Administrator.
2. Select PeopleTools, Utilities, Administration, TableSet Control.
3. Enter the set control value (for example, business unit) in the search criteria.
4. Find the service time templates record group, SP_12.
5. Change the existing setID value to the value of the set control value.
6. Click Save.
7. Repeat steps 3 through 6 for each business unit identified in the UPG_SPP706 query results.

Creating Calendars for Time Reporting

If you have not set up any calendars, you will need to create them and associate them to the time template. You will use the results from the post-upgrade query UPG_SPP708 to assist you in creating the calendars.

To create a calendar:

1. Log in as an Administrator.
2. Select Services Procurement, Define Services Procurement.
3. Select System-Wide Definitions from the General Setup folder and click on the Calendar Builder link.
4. Create a new calendar.
5. Enter a description, begin date, end date, and long description.
6. Enter the fiscal year if different from the default value.
7. Select the calendar type based on the distinct time periods from query UPG_SPP708 (for example: daily, weekly, bi-weekly, and so forth). Note that there may be additional options depending on the calendar type you select.
8. Click Generate to populate the Detail Periods grid.
9. Click Save.
10. Repeat for each distinct time period as identified in the query results.

Creating Time Reporting Rules

This step is optional if you have time templates that don't use overtime.

The current release uses time reporting rules for calculating different payouts. If your previous time templates are set up for overtime reporting, you will need to create new time reporting rules for each setID identified in the two post-upgrade queries UPG_SPQ707 and UPG_SPP708 to allow you to continue to report overtime. These new time reporting rules will replace the previous overtime reporting rules. Refer to the sample data provided in the new release Demo database for a time reporting rule that uses daily overtime.

To set up time reporting rules:

1. Log in as Administrator.
2. Select Services Procurement, Define Services Procurement.
3. Select Time and Expense Setup from the Settlement Setup folder.
4. Click Time Reporting Rules.
5. Create a new time reporting rule ID for each overtime rule and setID listed in the query results from UPG_SPQ707 and UPG_SPP708.

Based on your time reporting needs, some of the old overtime rules may be consolidated into the new time reporting rule.

6. Enter values for effective date, description, and default TRC (time reporting code).
7. Select the rule scope of Date, Day of Week, or Time Period.
8. Select the rule type of Time Quantity or TRC List.
9. Enter the information as it appears for the rule scope selected in the grid.
10. Click Save.

Note. If you do not have the TRCs set up for Overtime, you must first define the Overtime TRC.

Associating Calendars and Rules to Time Templates

Use the results from query UPG_SPP708 to review and attach calendars and time reporting rules to the appropriate time templates.

To review and attach calendars to time templates:

1. Log in as an Administrator.
2. Select Services Procurement, Define Services Procurement.
3. Select Time and Expense Setup from the Settlement Setup folder.
4. Click Service Time/Progress Template.
5. Enter the name of the template that you want to edit.
6. To attach the calendar, select the Service Calendar from the prompt.
7. To associate a time reporting rule, select the Time Reporting Rule ID from the prompt.
8. Enter the remaining information as needed.
9. Click Save.

See *PeopleSoft Enterprise 9.0 Services Procurement PeopleBook*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-20-12: Reviewing Vendor Setup Information

Services Procurement now looks to the common vendor setup tables to obtain the minority-owned and women-owned vendor attributes. You will use the results of query UPG_SPM709 that you created in the Chapter 1 step, “Review the PreUpgrade sPro Queries,” to reconcile any exceptions found.

To correct any discrepancies found:

1. Select Vendors, Vendor Information, Add/Update, Vendor.
2. Enter a vendor ID from the query results.
3. Select the Identifying Information tab.
4. Scroll to the bottom of the page and expand the Additional Reporting Elements option.
5. Modify the type of contract as needed.
6. Modify the women-owned business option as needed.

Note. Currently, only the “minority institution” contractor type and the women-owned business flag are mapped to the minority-owned and women-owned fields on Services Procurement’s Services Supplier Info page. All other reporting attributes are not supported by Services Procurement at this time.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Services Procurement	All	All

Task 5-21: Configuring PayBill Management

This section discusses:

- Updating PayBill Management Product ID

Task 5-21-1: Updating PayBill Management Product ID

In this step, you update the Pay/Bill Management Product ID for each Contract Profile.

To update the Pay/Bill Management Product ID:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Contract Profile.
2. Enter the Business Unit you want to update.

3. Under Product ID, select the appropriate value from the prompt list.
4. Repeat this step for each Contract Profile.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Pay/Bill Management	All	All

Task 5-22: Preparing Treasury Setup

This section discusses:

- Rerunning Auto Position Process
- Updating Market Exchange Codes
- Setting Up New Facilities
- Setting Up Document Sequencing
- Adding the Issue Date for Securities
- Adding CUSIP for Security

Task 5-22-1: Rerunning Auto Position Process

In this step, you rerun Auto Position processes for all deals. This will process every deal to calculate the cashflows, position and accounting events, reflecting any changes to the deals during upgrade.

To re-run the Auto Position process:

1. Select Deal Management, Capture Deals, Deal Position Update.
2. Select the Process All Outstanding Deals switch and run the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management Risk Management	All	All

Task 5-22-2: Updating Market Exchange Codes

In the new PeopleSoft release, a Country field has been added to the Market/Exchange Codes page. You need to populate this field appropriately with the name of the country to which the market or exchange belongs.

To update market/exchange codes:

1. Select Setup Financials/Supply Chain, Product Related, Treasury, Market/Exchange Codes.
2. Select each Market/Exchange and populate the Country fields appropriately.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Cash Management Deal Management Risk Management	All	All

Task 5-22-3: Setting Up New Facilities

This section discusses:

- Creating New Facilities
- Updating Existing Instruments

Creating New Facilities

In the new PeopleSoft release, two new facility types have been introduced: commercial paper and line of credit. In order to use the new functionalities, new facilities must be created using these new facility types.

To create new facilities:

1. Select Deal Management, Administer Deals, Facilities for Issuing Debt.
2. Add a new facility, selecting the appropriate facility type.

Updating Existing Instruments

Before the new PeopleSoft release, commercial paper and line of credit deals were not explicitly defined. To enable this new feature, the commercial paper or line of credit attribute check boxes must be selected for existing instruments.

To update existing instruments:

1. Select Deal Management, Administer Deals, Define Instruments.
2. Select the instrument to be updated.
3. On the Instrument Detail tab, select either the commercial paper or line of credit attribute at the bottom of the page.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 5-22-4: Setting Up Document Sequencing

If you have document sequencing enabled, you need to make sure the document type field is populated for each accounting template.

To update the accounting template with a document type:

1. Select Cash Management, Treasury Accounting, Accounting Templates.
2. Open the appropriate accounting template and specify a documentation type for the template.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 5-22-5: Adding the Issue Date for Securities

The issue date field needs to be populated for all upgrade paths.

To add issue dates for securities:

1. Select Deal Management, Administer Deals, Securities.
2. Open the appropriate security and add an issue date.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 5-22-6: Adding CUSIP for Security

CUSIP ID has been made a required field in the new PeopleSoft release. It needs to be populated for all securities.

Note. Complete this step only if you license Deal Management.

To update this field:

1. Select Deal Management, Administer Deals, Securities.
2. Open the appropriate security and add the CUSIP.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Deal Management	All	All

Task 5-23: Reviewing Electronic Layouts for Banks

In the new PeopleSoft release, Electronic Layouts have been added to Collection and Payment Methods on External Accounts. After the initial upgrade, you should review the layouts for each payment method for each account. Payments may be settled through either Pay Cycle Manager or the Financial Gateway, and at least one layout must be the *default* layout that will be used for all defaulting logic.

To update Electronic Layouts:

1. Select Banking, Bank Accounts, External Accounts.
2. Select the Collection Methods – Review the Electronic Layout grid.
3. Add new Electronic Layouts or modify existing layouts, if applicable.
4. Select the Payment Methods – Review the Electronic Layout grid.
5. Add new Electronic Layouts or modify existing layouts, if applicable.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Cash Management Deal Management Risk Management	All	All

Task 5-24: Completing Setup for Projects

This section discusses:

- Setting Up Analysis Type and Analysis Group
- Linking Project Status to Process Status
- Setting Unit of Measure for Hours and Days
- Setting Project Calendar
- Running Summary Refresh
- Calculating Team Member Duration
- Setting Default Project Manager Role

- Reviewing Rate Template Mapping

Task 5-24-1: Setting Up Analysis Type and Analysis Group

Many analysis types and analysis groups are integral to project processes. The upgrade delivers any additions or changes to the required analysis types and analysis groups under the Projects-owned setIDs of SHARE, MODEL and MFG. However, other setIDs were not updated because of the risk of overwriting any changes you may have made to these user-configurable variables. You will need to analyze the system-defined analysis types and analysis groups found under the SHARE setID and determine which additions or changes to migrate to any other setID that you use for Projects processing.

Here are the tables and the navigation to access them for further analysis:

- Projects Analysis Groups — PS_PROJ_AN_GRP_TBL: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Groups.
- Projects Analysis Types — PS_PROJ_ANTYPE_TBL: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Types.
- Projects Analysis Group Mapping — PS_PROJ_AN_GRP_MAP: Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Analysis Groups.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 5-24-2: Linking Project Status to Process Status

This section discusses:

- Assigning a Processing Status to Each Status Type
- Defining Project Status Defaults
- Creating Project Status Based on Project Processing Status

Assigning a Processing Status to Each Status Type

The processing status of a project is now based on the project status. For each status type defined in the system, you need to assign a processing status to that status type. If you do not have any status types defined in your system, you may skip this step.

To assign a processing status to each status type:

1. Select Set Up Financials/Supply Chain, Product Related, Project Costing, Project Options, Status Types. Make sure you are in Change History mode.

The Status Types page appears:

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | Help

Menu

- Project Options
 - Integration
 - Templates
 - Project Types
 - Status Types
 - Project Type Status Path
 - Project Roles
 - Phase Types
 - Events
 - Project Status Defaults
- Activity Options
- Transaction Options
- Pricing Structure
- Sharing Structure
- Promotions
- Management
- Proposal Management
- Receivables
- Resource Management
- Services Procurement
- Sourcing
- Staffing

Status Types

SetID: SHARE Project Status: A

Status Type

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 *Status: Active

*Status Description: Approved

Processing Status: Active

Status Control

Find | View All First 1 of 1 Last

Analysis Type:

Control Action:

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct Histc

Status Types page

- For each defined status type, select the appropriate processing status.
You will receive an informational message indicating that you are changing the project to Processing Status linkage on an existing effective-dated row. You can ignore this message.
- Click OK and then Save your changes.
- When you have finished updating each existing status type, you should have at least one status type with the processing status *Active*, one with the processing status *Pending*, and one with the processing status *Inactive*. If you do not have a status type with any one of these three processing statuses, you must create a new status type with the processing status that is missing.

Defining Project Status Defaults

For each SetID defined in the system, define the default project status for new projects. If you do not have any status types defined in your system, you may skip this step.

To define project status defaults:

- Select Set Up Financials/Supply Chain, Product Related, Project Costing, Project Options, Project Status Defaults.

The Project Status Defaults page appears:

Project Status Defaults

SetID: SHARE

Defaults

Effective Date: 01/01/1900 Status: Active

Specify the Default Status for each Processing Status. These defaults will be used for auto-generated projects from Resource Management, Customer Contracts, Grants, and Proposal Management. Project Portfolio Management and Program Management will use these defaults for projects in the "Costing" or "Declined" stages only.

Processing Status	Default Project Status
Active	Approved
Inactive	Closed
Pending	Proposed

Specify the Default Project and Processing Status for Auto-Generated projects created from Approved Requests in Project Portfolio Management and Program Management.

Processing Status: Active

Default Project Status: Approved

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

Project Status Defaults page

- For each processing status, select the default project status.

Creating Project Status Based on Project Processing Status

Project status is now required in the Project Costing. Therefore, you should create project statuses for all existing projects that do not have a project status. A project status should be created based on the processing status of the project.

To create project statuses:

- Select Set Up Financials/Supply Chain, Upgrade, Project Costing Post-Upgrade.

The Project Costing Post Upgrade page appears:

Project Costing Post Upgrade

Run Control ID: upg_post_pc

Buttons: Report Manager, Process Monitor, Run

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

Project Costing Post Upgrade page

- Create a new run control.
- Click Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 5-24-3: Setting Unit of Measure for Hours and Days

In this task, you set the Unit of Measure for hours and days at the Projects Business Unit level. Several new analytics and reports calculate the number of hours or days within a project. Therefore, the Unit of Measure for hours and days must be established. The Hours Unit of Measure for each Projects Business Unit defaults to MHR during the upgrade process. The Days Unit of Measure defaults to MDY. If these default settings are correct in your installation, you may skip this step.

If MHR is not the correct Unit of Measure for hours or MDY is not the correct Unit of Measure for days, you need to update the Projects Business Unit table using the database query/update tool of your choice. Update the value *xxx* in the UOM_HOURS field and *yyy* in the DAYS_UOM field on the PS_BUS_UNIT_TBL_PC table. *XXX* represents the Unit of Measure you have defined for hours and *YYY* represents the Unit of Measure you have defined for days.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 5-24-4: Setting Project Calendar

In order to utilize the Program Management scheduling functionality, a Project Calendar must be assigned to all Projects and Project Business Units. The Project Calendar may be any Business Calendar that defines the daily scheduled hours and all holidays. The upgrade process sets the Project Calendar to “01.” If your standard Business Calendar is “01,” skip this step.

Note. Complete this step only if you license Projects and Program Management.

If your standard Business Calendar is not “01,” update the Projects Business Unit Options table and the Projects tables using the database query or update tool of your choice. Use the table below to update your tables and fields.

Table	Field	Value
PS_BUS_UNIT_OPT_PC	HOLIDAY_LIST_ID	‘xxxxxxxxxx’ represents the Business Calendar you have defined for scheduling.
PS_PROJECT	HOLIDAY_LIST_ID	‘xxxxxxxxxx’ represents the Business Calendar you have defined for scheduling.

Properties

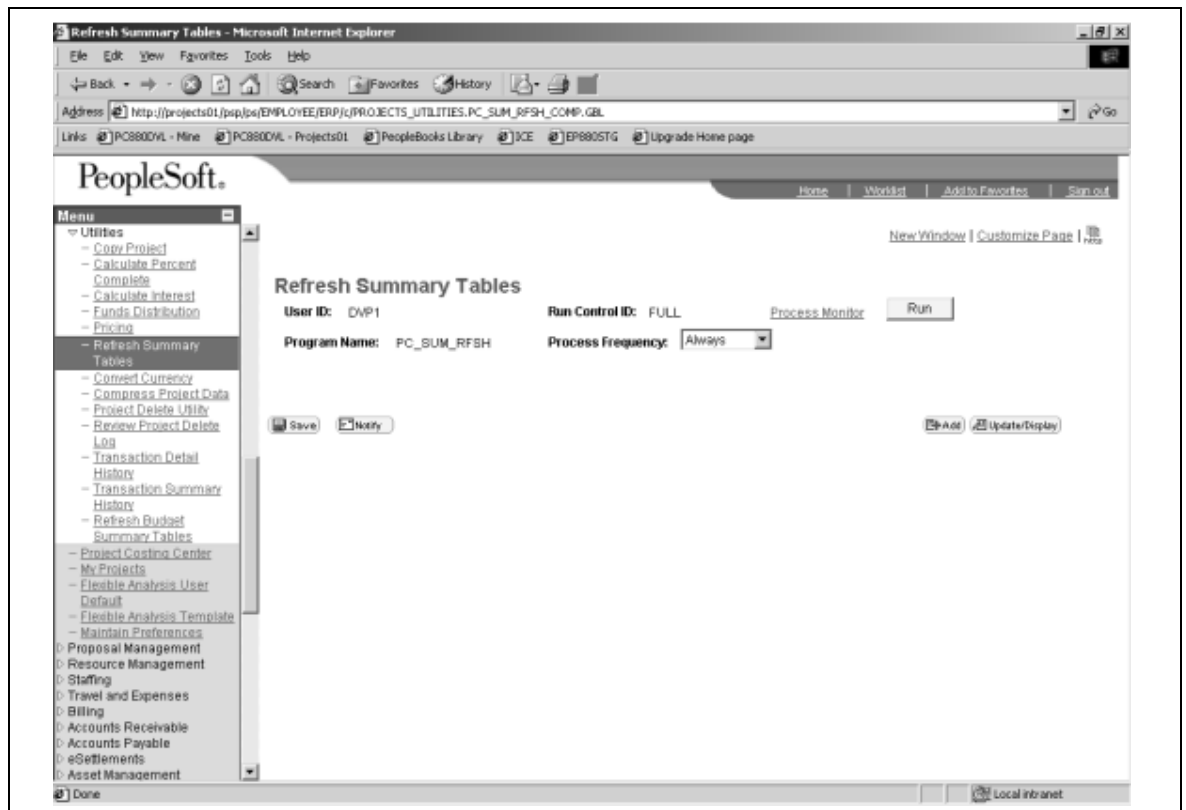
Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing Program Management	All	All

Task 5-24-5: Running Summary Refresh

In order to clear out any anomalous data that may be present in your system and to make sure the flexible analysis works correctly, you must run a full refresh on the summary tables now.

To run summary refresh:

1. Select Project Costing, Utilities, Refresh Summary Tables.
2. Add a new run control ID, or use an existing one.



Refresh Summary Tables page

3. Click Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 5-24-6: Calculating Team Member Duration

In order to use the Program Management resource scheduling functionality, the duration of each team member's role on a project needs to be calculated. This duration is used in the Master Resource Schedule feature. If you are not planning to use resource scheduling, you may skip this step.

Note. Complete this step only if you license Projects and Program Management.

To calculate resource duration:

1. Select Set Up Financials/Supply Chain, Upgrade, Program Mgmnt Post-Upgrade.

The Program Management Post-Upgrade page appears.



Program Management Post-Upgrade page

2. Add a new run control ID.
3. Click Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing Program Management	All	All

Task 5-24-7: Setting Default Project Manager Role

In this task, set the default project manager role at the Project Business Unit Options level. During the upgrade conversion, all existing project business units were updated with the default project manager role PROJ MANAGER. If this is the appropriate default role for project managers, you may skip this step.

If your installation uses a different role for project managers, you should update each project business unit option with the appropriate default project manager role.

To update the default project manager role:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Options.
2. Update the Project Manager Role field with the appropriate role for your installation.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing Program Management	All	All

Task 5-24-8: Reviewing Rate Template Mapping

In the new PeopleSoft release, Rate Templates are converted to Rate Sets. During this conversion the original Rate Template IDs were either renamed to new Rate set IDs or split into new Rate Sets, which are then contained in a new Rate Plan. The cross-reference between Rate Templates and Rate Sets/Rate Plans are retained in the UPG_PC_RT_TMP table.

To review mapping between Rate Templates and Rate Sets/Rate Plans:

1. Use the query tool of your choice to display all rows in UPG_PC_RT_TMP.
2. Use the following table to review the mapping:

Field	Definition
BUSINESS_UNIT	Business Unit
PC_TEMPLATE_ID	Original Rate Template ID
TEMPLATE_TYPE	Rate Template Type
TEMPLATE_ID	New Rate Set ID
RATE_PLAN	New Rate Plan ID

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Costing	All	All

Task 5-25: Setting Sync IDs

Sync IDs for Mobile Time and Expense provide a unique key to a record that can be used by the sync server to identify data rows online and on a mobile device. Before Mobile Time and Expense can be functional, you must run the Sync ID utility to populate all records in the database with the Sync ID field.

Note. To complete this task, you need to use PeopleSoft Internet Architecture (PIA). If you do not have your PIA environment established for this upgrade pass, the task can be postponed until you have established your PIA environment. You will need to complete this task for your functional testing as well as the Move to Production.

To run the Sync ID Utility:

1. In the appropriate SQL Tool for your platform, run the following statement:

```
UPDATE PSXLATITEM SET SYNCID = 0
```

This will clear out the duplicate SYNCIDs from this Translate table.

2. Open Application Designer.
3. Select File, Open.
4. Select *Project* from the dropdown list.
5. In the Name field, verify whether MTE_RELATED_CONTENT exists.
6. If MTE_RELATED_CONTENT exists, open the project and verify that all of the following objects exist:

```
TE_ADD_NEW_EXPENSE
TE_ALERT_AREA_MSG
TE_EXP_RPT_SIG
TE_GEN_INFO_HTML
TE_GROSS_UP_EST
TE_RS_RETURN
TE_START_EXP
TE_START_RS
TE_TIME_RPT_SIGNATURE
TE_TITLE_BAR
```

Note. If all of these objects exist, skip the remaining steps.

7. If MTE_RELATED_CONTENT does not exist, select File, Save Project As....
8. Enter *MTE_RELATED_CONTENT*.

9. Click OK.
10. Navigate to the Insert Menu.
11. Select Definitions into Project.
12. Select *HTML* in the Definitions Type drop-down list box.
13. Insert the following HTML objects into the Project:

```

TE_ADD_NEW_EXPENSE
TE_ALERT_AREA_MSG
TE_EXP_RPT_SIG
TE_GEN_INFO_HTML
TE_GROSS_UP_EST
TE_RS_RETURN
TE_START_EXP
TE_START_RS
TE_TIME_RPT_SIGNATURE
TE_TITLE_BAR

```

14. Select *Style Sheets* in the Definitions Type drop-down list box.
15. Insert the following Style Sheet objects into the project: *PSSTYLEDEF*.
16. Save the project and confirm that all listed objects above are in the Project *MTE_RELATED_CONTENT*.
17. Run the Sync ID utility by selecting PeopleTools, Utilities, Administration, Set SyncIDs.
18. Select Set Sync IDs.

This process will take a while to complete.

Note. Once the Sync IDs are set, the application servers must be recycled by a System Administrator. Please have the System Administrator shut down all application servers, delete all cache, and restart all application servers.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Mobile Time and Expense	All	All

Task 5-26: Setting Resource Management

This section discusses:

- Loading Holidays

Note. If you do not license Resource Management, you can skip this task.

Note. To complete this task, you need to use PeopleSoft Internet Architecture (PIA). If you do not have your PIA environment established for this upgrade pass, the task can be postponed until you have established your PIA environment. You will need to complete this task for your functional testing as well as the Move to Production.

Task 5-26-1: Loading Holidays

In earlier releases of Resource Management, when the holidays process runs it creates holiday entries in the resource calendar with TASK_TYPE as *HOLIDAY*. In the new PeopleSoft release a new TASK_TYPE as *SCHEDULED_HOLIDAY* has been introduced. You must run the Load Holidays process at the end of the upgrade in order to properly assign holidays to the correct task category.

This step deletes all calendar entries where task type is set to “HOLIDAY” for the future date and creates new entries in the calendar with new task type as “SCHEDULED_HOLIDAY”.

To run the Load Holiday process:

1. Select Set Up Financials/Supply Chain, Common Definitions, Resource Data, Load Holidays.
2. Add a new Run Control ID.
3. Click Save.
4. Click the Run button to access the Process Scheduler Request page.
5. Select the appropriate Server Name and click OK to run the process.
6. Check the Process Monitor to verify that the process ran to completion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Resource Management	All	All

Task 5-27: Performing Payables Setup

This section discusses:

- Setting Up Match Rules and Rule Control
- Setting Up Document Association Rules
- Setting Definitions Terms and Templates
- Running the Matching Process
- Running Document Tolerance Checking
- Verifying Procurement Withholding ChartFields

Task 5-27-1: Setting Up Match Rules and Rule Control

This section discusses:

- Understanding Setting Up Match Rules and Rule Control
- Adding a New Match Rule Type
- Adding or Updating Match Rules
- Adding or Updating Match Rule Control

Understanding Setting Up Match Rules and Rule Control

If you have added or customized Match Rules, you would have documented your customizations when you executed match rules and transactions.

See “Prepare Your Database,” Executing Match Rules and Transactions.

You must now add your new or customized Match Rules back after data conversion.

In the current release, the rules have to be tied to a rule type. The delivered rule types are DATA ENTRY, MERCH – QTY, MERCH – UNIT, MERCH – AMT, SUMMARY-GLOBAL, and SYSTEM. If for your customized rule, none of these rule types are applicable, you can create a new rule type and tie the customized rule to this new rule type.

Adding a New Match Rule Type

To add a new match rule type:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rule Type.

The Match Rule Type page appears.

Match Rule Type

Match Rule Type: DATAENTRY

*Description: Data Entry

☒ Workflow Flag

☒ Send Email Notification Notification Reminder Days: 10

▼ User List Source

☒ Role Role Name: Accounts Payable Manager

☐ SQL Definition SQL Object Identifier:

☐ Query Query Name:

Allowed Match Actions			Customize Find View All First 1-2 of 2 Last	
Action	Allow on Rule Control	Allow on Workbench		
Exception	☒	☐	+	-
Override	☐	☒	+	-

Save Return to Search Previous in List Next in List Notify Add Update/Display

Match Rule Type page

2. Enter a description for the new match rule type.

See *PeopleSoft Enterprise 9.0 Source-To-Settle Common Information PeopleBook*, “Defining Procurement Options,” Establishing Matching and Document Association Rules

Adding or Updating Match Rules

To add or update match rules:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rules.
2. To update an existing match rule ID, enter the match rule ID and click Search.
3. To add a new match rule ID, click Add.

Rule Definition | Workbench | Workflow

Match Rule ID: 110 **Description:** Unmatched receipt doesn't meet assoc rule

Long Description: Available receipts (not matched, not on hold, and not cancelled) for the purchase order specified on the voucher line, however no document association was made

Rule Properties

***Match Rule Type:** Data Entry

Match Rule Level: Line Summary **Match Level Data Record:** AP_VCHR_LN_SUM [Edit SQL](#)

Match Rule SQL Object: AP_MTCH_110

☐ Use Tolerance at Rule Control

Message

Message Set Number: 7500 **Message Number:** 216 [View Message](#)

Rule Applies To

Association Name	Description		
VPR	VOUCHER-PO-RECEIVER	+	-

Rule Definition page

See *PeopleSoft Enterprise 9.0 Source-To-Settle Common Information PeopleBook*, “Defining Procurement Options,” Establishing Matching and Document Association Rules

Adding or Updating Match Rule Control

To add or update Match Rule Control:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Match Rule Control.

The Match Rule Control page appears.

Match Rule Control

SetID: SHARE Match Rule: STANDARD
 *Description: Standard match rules *Currency Code: USD
 Long Description: Match rules for Amount Only orders, two way, three way, ERS three-way, four way, receipt only and ERS receipt only matching.

Match Rule Configuration Find First 1 of 1 Last
 Effective Date: 01/01/1900 Delete Rules Clear Rules Populate Rules +

Match Rules Customize Find View All First 1-10 of 38 Last
 Rules Tolerances ERS

	Delete	Match Rule ID	Description	If Rule is True Take Action	*Continue to Next Rule		
1	☐	RULE_S100	Invalid Match Control ID	Exception	Continue If False	+	-
2	☐	RULE_S110	Credit Adjustment Quantity > PO Matched Quantity	Exception	Continue If False	+	-
3	☐	RULE_S111	Credit Adjustment Amount > PO Matched Amount	Exception	Continue If False	+	-
4	☐	RULE_S120	Credit Adjustment Quantity > Receiver Match Qty	Exception	Continue If False	+	-
5	☐	RULE_S121	Credit Adjustment Amount > Receiver Match Amount	Exception	Continue If False	+	-

Match Rule Control page

- Add or update any of your customizations that you made to the Match Rule Control.

See *PeopleSoft Enterprise 9.0 Source-To-Settle Common Information PeopleBook*, “Defining Procurement Options,” *Establishing Matching and Document Association Rules*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 5-27-2: Setting Up Document Association Rules

This section discusses:

- Adding and Updating Document Association Rules
- Associating a Document Association With a Business Unit
- Configuring Payables Installation Options

Receipt Aware Criteria is renamed in this release to Document Association Rules.

Adding and Updating Document Association Rules

If you have added or customized Receipt Aware Criteria, you would have documented your customizations when you executed match rules and transactions.

See “Prepare Your Database,” Executing Match Rules and Transactions.

You must now add your new or customized Receipt Aware Criteria back after data conversion.

To add or update Document Association rules:

1. Select Set Up Financials/Supply Chain, Product Related, Procurement Options, Vouchers, Document Association Rules.
2. Enter the SetID and Document Association of the rule you want to update and click Search.
3. Click Add to add a new Document Association Rule.

Document Association Rules

SetID: SHARE
 Document Association: STANDARD
 Description: Standard Association Rules

Document Association							Customize	Find	View All	First	1-5 of 5	Last
		Rule	Voucher	Receiver	Amount Only	User Criteria						
1		Equal	Quantity	Qty Accept	☐	User Criteria	+	-				
2		Equal Sum	Quantity	Qty Accept	☐	User Criteria	+	-				
3		Equal	Quantity	Qty Accept	☐	User Criteria	+	-				
4		Equal Sum	Quantity	Qty Accept	☐	User Criteria	+	-				
5		User Criteria	Quantity	Qty Accept	☐	User Criteria	+	-				

Document Association Rules page

Associating a Document Association With a Business Unit

Once Document Association rules have been established, they have to be tied to the Payables Business Unit. This is most important. If not configured correctly, Document Association (Receipt association) will not work during matching.

To associate a Document Association with a business unit:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Payables, Payables Definition.
2. Select the business unit that needs to have a Document Association and click Search.

Definition Tax Options Voucher Build **Matching** Payments Numbering Summary Invoice

Business Unit: US001 US001 NEW YORK OPERATIONS

Matching Criteria

Document Association: STANDARD Standard Association Rules

Match Delay Days: 0

☒ Matching for Voucher Approval

☒ Copy Gross Amount to Voucher

Matching page

3. Select the Document Association that you want to associate to this business unit.
4. Save the page.

Configuring Payables Installation Options

In this release, the System is delivered with three Association definitions:

- VPR
- VP
- VR

The name of this delivered group is DEFAULT. You need to attach the DEFAULT group to the payables installation options. This is an important task. If not configured at the installation level, matching will match without applying any rules.

To attach the DEFAULT group to the payables installation options:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Click the Payables tab.
3. Select the Document Association Group DEFAULT.

Payables page

4. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 5-27-3: Setting Definitions Terms and Templates

This section discusses:

- Understanding Definitions, Terms, and Templates
- Setting Up Accounting Entry Templates

Understanding Definitions, Terms, and Templates

In this step you will set up accounting entry templates, assigning account numbers to all templates.

Setting Up Accounting Entry Templates

The following new account types have been loaded in as part of the Upgrade Project:

- AR Rebate Control
- Reconciled Cash Advance
- Tolerance Miscellaneous Charge
- Rebate Agreement

You must assign an account number for each type for *all* of your Accounting Entry Templates.

To set up accounting entry templates:

1. If you need to define new Accounts, select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values, ChartField Values, Account.
Add your new accounts for each new accounting type: AR Rebate Control, Reconciled Cash Advance, Tolerance Miscellaneous Charge, and Rebate Agreement.
2. To add the accounts to the templates, select Set Up Financials/Supply Chain, Common Definitions, Accounting Entry Template, Templates.
 - a. Enter a SetID and click Search.
 - b. Select an Accounting Template.
The Accounting Entry Template page appears.
 - c. Add an account and other ChartField values, if needed, to the new accounting types.

Note. You must make your changes in CORRECT HISTORY mode in order for the new account types to appear in the page.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 5-27-4: Running the Matching Process

To view the existing vouchers that are currently in *Exception* or *Overridden* status on the Matching Workbench, you need to run the matching process against those vouchers. After you set up the match rules and document association rules, you should run the matching process. This will pick up all the vouchers that are currently in *Ready*, *Exception*, or *Overridden* status. After the matching process runs successfully, you can view vouchers on the Matching Workbench component. You must run the matching process for all the business units.

To run the matching process:

1. Select Accounts Payable, Batch Processes, Vouchers, Matching.
2. Add a new run control.
3. Enter a description.
4. Set the Match action to *Matching*.
5. From the options drop-down list, select All Business Units.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 5-27-5: Running Document Tolerance Checking

Review the Document Tolerance definition set on Define Doc Tolerance by selecting Set Up Financials/Supply Chain, Product Related, Procurement Options.

To identify exception vouchers to be processed, run the following query against your database:

```
UPG_APY02
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 5-27-6: Verifying Procurement Withholding ChartFields

During the upgrade new Setup tables were populated due to enhancements to Withholding/1099. The data that was populated came from the Withhold Entity page. You must check the Withholding ChartFields defined under the Procurement Control to ensure that the tableset sharing is the same. If it is not then you must go back to Procurement Control and change the ChartField.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payables eSettlements	All	All

Task 5-28: Completing Receivables Changes

This section discusses:

- Running Customer Follow Up Query
- Adding a Cash Control Journal Generator Template
- Updating Existing Conversations

Note. If you do not have Receivables, you can skip this task.

Task 5-28-1: Running Customer Follow Up Query

The new customer conversation functionality requires you to provide a business unit when creating follow up letters. In this step you will run a query to know which operators need to update their existing run controls for conversation follow up letters. The query should be used to notify users that they should update the run control with the business units they need to process when creating follow up letters. As the clean up effort continues, the query can be run as needed to identify which operators and run controls have not been updated.

To run the UPG_ARU10 query:

1. Select Reporting Tools, Query, Query Viewer.
2. Run the following query:

UPG_ARU10

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Receivables	All	All

Task 5-28-2: Adding a Cash Control Journal Generator Template

If you are a Receivables customer running Cash Clearing, you must create a new journal generator template in order to journalize cash clearing entries. For information on how to set up a journal generator template, see the reference below. A cash clearing template for Receivables is delivered in demo data and can be referred to when setting up the new journal generator template.

See *PeopleSoft Enterprise 9.0 Receivables PeopleBook*

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Receivables	All	All

Task 5-28-3: Updating Existing Conversations

In the new PeopleSoft release, customer conversations have been enhanced to group conversations by business unit. This allows AR Receivable specialists to create follow up letters by business unit. Earlier in the upgrade, all existing conversations with follow up letters were created. If there is a need to create a follow up letter from an existing conversation, a business unit value *must* be populated on the conversation before creating the letter. Online functionality populates the business unit field at Save time based on the user's default business unit on the User Preferences page. If the user's default business unit is different than the business unit of the customer conversation, you can update the user preferences page with the correct business unit.

To update the default business unit for an operator:

1. Select Financials/Supply Chain, Common Definitions, User, Preferences, Define User Preferences.
2. Select the user that will access the conversation.
3. Select Overall Preferences Hyperlink.
4. Select the business unit to be populated on the conversation.
5. Save the page.

To update an existing conversation:

1. Select Customers, Conversations, Update Conversations.
2. Select a customer conversation.
3. Change the status to Open.
4. Save the page.

Note. In the new PeopleSoft release, all conversations require a contact ID. Conversations that are updated will require you to select a contact ID for the conversation. Click the Edit Entry button on the Conversation Entries scroll to select a valid contact ID.

5. After the conversation has been updated with the correct business unit, the default business unit on the User Preferences page can be changed back to its original value.
6. If this procedure cannot be implemented, you can update the conversation records with a SQL script.

For a reference the following records should be updated with the desired business unit value:

```
CUST_CONVER.BUSINESS_UNIT
CUST_CONVER_LNG.BUSINESS_UNIT
CUST_CONVER_ATT.BUSINESS_UNIT
CUST_CONVER_DTL.BUSINESS_UNIT
CUST_CONVER_HDR.BUSINESS_UNIT
CUS_CNV_HDR_LNG.BUSINESS_UNIT
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Receivables	All	All

Task 5-29: Updating eSettlements

This section discusses:

- Validating Buyer Registration
- Validating Agreement Registration

Task 5-29-1: Validating Buyer Registration

Follow the steps in the procedure below to validate the buyer registration payment method assignment.

To validate the buyer registration payment method assignment:

1. Select eSettlements, Buyer Information, Review Buyer Details.
2. Select the buyer that you want to review.
3. Review the bank data on the Bank Information page and ensure that the payment method is correct.
4. If the payment method of the Bank Information page needs to be corrected, then in the BSP model, select the correct payment method on the Buyer Information – Bank Information page. In the BD model, navigate to the Payables Business Unit Options, for the buyer, and select the correct payment method on the Payment Options page.
5. If the value you want does not appear in the drop-down list box, then the payment method is not valid for this particular bank account. To address this problem, follow these steps:
 - a. Go to the Bank setup pages and add the desired payment method to the bank account.
 - b. Return to this page to assign the new payment method to the buyer.

The screenshot displays the 'Buyer Registration Information' page with the 'Bank Information' tab selected. The page shows the following details:

- Buyer:** BUY01 Dean Jones & Bishop
- Bank:** USA BANK
- Bank Account:** EFT Account
- Payment Method:** Electronic Funds Transfer

Below the details, a message states: 'Buyer Creation / Modification initiates several background processes and can take a minute or so to run. Please be patient.' A 'Modify Buyer' button is visible. At the bottom, there are links for 'Registration', 'Address', 'Bank Information', 'Approval Rules', and 'ChartField Configuration'.

Buyer Registration Information page

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eSettlements	All	All

Task 5-29-2: Validating Agreement Registration

In this step, you review and validate the buyer Agreement Registration payment method assignment.

To validate the Agreement Registration payment method assignment:

1. Select eSettlements, Buyer Information, Review Agreement Details.
2. Choose the agreement that you want to review.

Note. The user profile of your current user ID must have the Buyer Administration Role type assigned to one of its roles and the proper security for all buyers to access agreements.

3. Review the bank data on the Buyer page and ensure that the payment method is correct.
4. If the payment method is not correct, correct the payment method now.
5. If the value you want does not show up in the drop-down list box, then the payment method is not valid for this particular bank account. To address this problem, follow these steps:
 - a. Go to the bank setup pages and add the desired payment method to the bank account.
 - b. Return to this page to assign the new payment method to the buyer.

The screenshot displays the 'Agreement Registration Buyer Information' page. On the left is a 'Menu' pane with a search bar and a tree view containing 'eSettlements', 'Buyer Information' (with sub-items 'Review Buyer Details', 'Review Agreement Details', and 'Review User Profiles'), 'Invoices', 'eSettlements Center', 'Application Diagnostics', and 'Data Expansion Tool'. The 'Review Agreement Details' option is highlighted. The main area has three tabs: 'Buyer', 'Buyer Notifications', and 'Supplier'. The 'Buyer' tab is active, showing the following sections:

- Agreement Reference:** Buyer: BUY01 (Buyer One), Supplier: BOOKS4U (Books for You), Location: 1.
- Buyer Processing Options:** A checkbox for 'Standard Vouchers Allowed' is checked. A 'Supplier Ref ID' field is empty.
- Comments:** A text area for comments with up/down arrow controls.
- Bank Information:** Fields for 'Bank Code' (USA BANK), 'Bank Account' (EFT Account), and 'Payment Method' (Electronic Funds Transfer).
- Self-Service Invoice Options:** An 'Invoice Verification Option' dropdown set to 'No Invoices'.

At the bottom are 'Save' and 'Cancel Agreement' buttons. In the top right corner, there are links for 'New Window' and 'Help'.

Agreement Registration Buyer Information page

See Also

PeopleSoft Enterprise 9.0 eSettlements PeopleBook

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eSettlements	All	All

Task 5-30: Updating the General Ledger

This section discusses:

- Understanding the General Ledger
- Modifying Accounting Entry Definitions
- Setting Up Adjustment Year
- Setting Up Adjustment Period Default
- Modifying Adjustment Period Defaults
- Setting Up Adjustment Periods
- Cleaning Up Adjustment Periods

Understanding the General Ledger

This task assists you in updating the General Ledger. If you have not licensed General Ledger, you can skip this task.

Task 5-30-1: Modifying Accounting Entry Definitions

This section discusses:

- Understanding Accounting Entry Definitions Modifications
- Identifying Invalid Accounting Entry Definition Field Mappings
- Correcting Accounting Entry Definition

Understanding Accounting Entry Definitions Modifications

The Accounting Entry Definition maps the subsystem accounting entry table fields to fields on the journal line table. In the new PeopleSoft release, fields from the subsystem accounting entry table can no longer be larger than the target journal fields.

Identifying Invalid Accounting Entry Definition Field Mappings

Any invalid field mappings must be corrected for Journal Generator to successfully run.

To identify invalid Accounting Entry Definition field mappings:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following queries:

Journal Reference Mapping, UPG_GLY01

Journal Description Mapping, UPG_GLY02
Open Item Key Mapping, UPG_GLY03

Correcting Accounting Entry Definition

If any of these queries return records, you need to correct the corresponding accounting entry definitions.

To correct the Accounting Entry Definition:

1. Select General Ledger, Journals, Subsystem Journals, Accounting Entry Definition.
2. Use the output from the above queries to populate the SetID and Accounting Definition Name fields on the search page.
3. Click Search.
4. Correct the invalid field mapping by either removing the mapped entry, choosing another field, or remapping the field.

Note. On the journal line table, Journal Reference field size is 10, Journal Description field size is 30, and Open Item Key field size is 30. The sizes for the mapped fields you use on the Accounting Entry Definitions should be smaller than the fields on the journal lines.

5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-30-2: Setting Up Adjustment Year

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Fields with No Adjustment Year
- Correcting Fields with No Adjustment Year

Understanding Adjustment Period Modifications

In the new PeopleSoft release, the Adjustment Period setup was enhanced to support an adjustment year for each adjustment period. Prior to this, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Fields with No Adjustment Year

To identify fields with no adjustment year set:

1. Select Reporting Tools, Query, Query Manager.

2. Run the query **No Adjustment Period Default**, UPG_GLP01.

The query output lists values for the following fields:

- PeopleSoft Product
- Business Unit
- Ledger Group

Correcting Fields with No Adjustment Year

To correct fields with no adjustment year, identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update.
2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.
3. Click Search.
4. Adjustment Year is a required field. Set the adjustment year to an appropriate value for each Adjustment Period entry where this field is missing.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 5-30-3: Setting Up Adjustment Period Default

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Fields with No Adjustment Period Default
- Correcting Fields with No Adjustment Period Default

Understanding Adjustment Period Modifications

In the new PeopleSoft release, the Adjustment Period setup was enhanced to support an adjustment year for each adjustment period. Prior to this, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Fields with No Adjustment Period Default

To identify whether no Adjustment Period default has been set for a given business unit and ledger group:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query **No Adjustment Period Default**, UPG_GLP02.

The query output lists values for the following fields:

- PeopleSoft Product
- Business Unit
- Ledger Group

Correcting Fields with No Adjustment Period Default

To correct fields with no adjustment period default, identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update.
2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.
3. Click Search.
4. One Adjustment Period entry must be marked as the default. Select the adjustment period that is to be the default and check the Default check box.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 5-30-4: Modifying Adjustment Period Defaults

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Multiple Adjustment Period Defaults
- Correcting Multiple Adjustment Period Defaults

Understanding Adjustment Period Modifications

In the new PeopleSoft release, the Adjustment Period setup was enhanced to support an adjustment year for each adjustment period. Prior to this, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Multiple Adjustment Period Defaults

To identify where multiple Adjustment Period defaults exist:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query **Multiple Adj Period Defaults**, UPG_GLP03.

The query output lists values for the following fields:

- PeopleSoft Product
- Business Unit
- Ledger Group
- Accounting Period
- Fiscal Year
- Default Flag

Correcting Multiple Adjustment Period Defaults

To correct the multiple adjustment period defaults identified by the query in the previous step:

1. Select Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update.
2. Use the output from the query you ran in the previous step to populate the PeopleSoft Product, Business Unit, and Ledger Group fields on the search page.
3. Click Search.
4. For each Business Unit and Ledger Group, there can be only one Adjustment Period entry marked as the default. Select the Adjustment Period that is to be the default and clear the remaining entries.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 5-30-5: Setting Up Adjustment Periods

This section discusses:

- Understanding Adjustment Period Modifications
- Identifying Open Period Setup with No Adjustment Periods
- Correcting Open Period Setup with No Adjustment Periods

Understanding Adjustment Period Modifications

In the new PeopleSoft release, the Adjustment Period setup was enhanced to support an adjustment year for each adjustment period. Prior to this, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Open Period Setup with No Adjustment Periods

To identify Open Period setup without any adjustment periods:

1. Select Reporting Tools, Query, Query Manager.

2. Run the query **No Adjustment Period Default**, **UPG_GLP04**.

The query output lists values for the following fields:

- PeopleSoft Product
- Business Unit
- Ledger Group

Correcting Open Period Setup with No Adjustment Periods

To correct Open Period setup with no adjustment periods, identified by the query in the previous step:

1. Select **Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Open Periods, Open Period Update**.
2. Use the output from the query you ran in the previous step to populate the **PeopleSoft Product**, **Business Unit**, and **Ledger Group** fields on the search page.
3. Click **Search**.

The Adjustment Period grid will be pre-populated with the adjustment periods that have been defined for the detail calendar that is associated with the Business Unit and Ledger Group. The adjustment year will be set for each entry. The adjustment periods will all be closed and no default adjustment period will be set.

Note. When associating a ledger group with a business unit, a calendar ID is specified. A detail calendar defines the number and duration of accounting periods in a fiscal year. It also identifies the adjustment periods for the calendar.

4. Update the adjustment period entries as needed by updating the adjustment year and open adjustment periods, and setting a default. One Adjustment Period entry must be marked as the default. Select the Adjustment Period that is to be the default and check the **Default** check box.
5. Save the page.

Note. Even if you make no changes, you must click the **Save** button in order to save the adjustment period data that has been pre-populated by the system.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 5-30-6: Cleaning Up Adjustment Periods

Understanding Adjustment Period Modifications

In the new PeopleSoft release, the Adjustment Period setup was enhanced to support an adjustment year for each adjustment period. Prior to this, there was only one open fiscal year for adjustment purposes. For each business unit and ledger group, a user can identify which adjustment periods and fiscal year combinations are open or closed as the accounting cycle evolves. The user also sets a default adjustment period for each business unit and ledger group.

The upgrade data conversion process sets the adjustment year and default flag for the adjustment periods from existing Open Period data. Manual updates are needed to correct any missing data or duplicate data conditions.

Identifying Adjustment Periods for Cleanup

To identify adjustment periods that need to be cleaned up:

1. Select Set Up Financials/Supply Chain, Upgrade, Adjustment Period Post-Upgrade.
2. The Adjustment Periods grid will be populated with adjustment periods that have no corresponding Open Period setup. These are orphaned rows and they need to be deleted. Analyze the entries and determine which adjustment periods you want to delete.

Note. If the Adjustment Periods grid has no rows, then there is no data to delete. No further action is required.

Deleting Orphaned Adjustment Periods

To delete the orphaned adjustment periods:

1. Click the Select All icon to select every adjustment period on the list for deletion. Or, you can click the Clear All icon to reverse this action and select rows individually.
2. To delete the selected rows, click the Delete button.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	General Ledger	All	All

Task 5-31: Setting Up Commitment Control

This section discusses:

- Checking Funding Source Allocations
- Setting Up Wait Time for Budget Check

Task 5-31-1: Checking Funding Source Allocations

This section discusses:

- Understanding Duplicate Funding Source Allocation
- Identifying Duplicate Funding Source Allocation
- Correcting Duplicate Funding Source Allocation

Note. Perform this step only if you use Funding Source in Commitment Control and have defined Funding Source allocations.

Understanding Duplicate Funding Source Allocation

A duplicate Funding Source allocation is a Funding Source allocation with duplicate funding source values on the allocation details grid of the Funding Source Allocation page.

In the new PeopleSoft release, the Budget Processor was enhanced to handle the Funding Source distribution. But the Budget Processor will *not* be able to handle the Funding Source distribution based on a duplicate Funding Source allocation. Any duplicate Funding Source allocations have to be corrected to avoid the duplicate funding source values on the details grid. Otherwise, the Budget Processor will terminate abnormally when involved in Funding Source distribution.

Identifying Duplicate Funding Source Allocation

To identify all the duplicate Funding Source allocations:

1. Select Reporting Tools, Query, Query Manager.
2. Run the query Duplicate Funding Source Alloc, UPG_GLQ01.

The query output lists values for the following fields:

- Business Unit
- Ledger Group
- ChartField Value
- Funding Source
- Duplicate Count

Correcting Duplicate Funding Source Allocation

To correct a duplicate Funding Source allocation identified by the query in the previous step:

1. Select Commitment Control, Define Control Budgets, Funding Source Allocation.
2. Use the output from the query you ran in the previous step to populate the Business Unit, Ledger Group, and ChartField Value fields on the search page.
3. Click Search.
4. Delete the duplicate funding source rows on the details grid, or change the duplicate funding source values to some not-yet-used values for this allocation.
5. Save your changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-31-2: Setting Up Wait Time for Budget Check

The On-Line Budget Checking option allows you to specify the maximum time (in minutes) a user would have to wait after running an online budget check.

See *PeopleSoft Enterprise 9.0 Application Fundamentals PeopleBook* “Setting Installation Options for PeopleSoft Applications”

To set the maximum wait time for the On-Line Budget Checking option:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Click the Commitment Control link.
3. Under the On-Line Budget Checking option, in the Maximum Wait Time edit box, enter the maximum waiting time.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	eProcurement Expenses General Ledger Grants Management Payables Project Costing Purchasing Receivables	All	All

Task 5-32: Completing Asset Management Setup

This section discusses:

- Setting Up Asset Attributes
- Running Asset Attributes

Task 5-32-1: Setting Up Asset Attributes

In this release, Asset Attributes are added to Asset and Profile tables. Asset Type is a required field and this field value must be populated before using the system.

To set up Asset Type and Asset Subtype:

1. Select Set Up Financials/Supply Chain, Upgrade, Define AM Asset Attributes – post.
2. Select the setID that is associated with the profile.

The Define AM Asset Attributes page appears:

Define AM Asset Attributes

Attributes

SetID: SHARE [Get Profiles](#)

Customize | Find | View All | First 1 of 1 Last

Asset Profile ID	Description	Asset Type	Asset Subtype
1			

Save Add Update/Display

Define AM Asset Attributes page

- Click the Get Profile link.

This populates the grid with all the Asset Profile IDs for the selected setID.

Define AM Asset Attributes

Attributes

SetID: SHARE

Customize | Find | View All | First 1-10 of 18 Last

Asset Profile ID	Description	Asset Type	Asset Subtype
1	AUTO	Automobile	Fleet
2	BLDG	Building	Facility
3	COMPUTERS	Computer	Hardware
4	CRESpace	Corporate Real Estate Space	Facility
5	DSPLAYUNIT	Display Shelves	Equipment
6	FURNITURE	Furniture & Fixtures	Furniture
7	IMPAIR	Profile for Impairment	Other
8	LAND	Land	Intangible
9	LEASED CAR	Leased Car	Fleet
10	LEASED EQT	Leased Eqt	Equipment

Save Add Update/Display

Define AM Asset Attributes page with Profile IDs

- For each Asset Profile ID, select an appropriate value in the Asset Type and Asset Subtype fields.

Note. To assign asset subtypes on this page, you need to set them up first. To set up asset subtypes, select Set Up Financials/Supply Chain, Product Related, Asset Management, Physical Definitions, Asset Subtype Properties.

- Click Save.

6. Repeat steps 2 through 5 for all setIDs.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Asset Management	All	All

Task 5-32-2: Running Asset Attributes

After setting up Asset Attributes for all the profiles, run the Asset Attribute post upgrade Application Engine, UPG_AM_PSP10. This populates the Asset and Profile tables with Asset Attribute data. Asset type will be populated to Others for the non-profile assets.

This Application Engine also populates the tables ASSET, BOOK, BUS_UNIT_TBL_AM, BU_BOOK_TBL, and ASSET_WARRANTY with the record default values for the new fields.

To run this Application Engine, select Set Up Financials/Supply Chain, Upgrade, Run Asset Attribute-post.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Asset Management	All	All

Task 5-33: Completing Contracts Setup

This section discusses:

- Understanding Completing Contracts Setup
- Updating Limits Totals
- Running the Limit Amount Report
- Setting Up Billing Summarization
- Reviewing Contracts Rate Plans

Understanding Completing Contracts Setup

In this task, you complete the setup for Contracts. This involves updating limit totals, running the limit amount report, setting up billing summarization, and attaching rated plans.

See *PeopleSoft Enterprise Contracts 9.0 PeopleBook*.

Task 5-33-1: Updating Limits Totals

For all existing contract lines with a limit amount greater than zero, the limit amount has been moved from the Limit Amount field on the contract detail line (CA_DETAIL.LIMIT_AMOUNT) to the Funded / Billing Limit amount field on the new contract limit and fee detail line table (CA_LMT_FEE_DTL.LIMIT_AMT_BIL). Additional information that will now be tracked on the contract limit and fee detail line includes the total amount processed against the limit and the total amount that is in excess of the limit, as well as various dates such as the date on which the limits process was last run and the date on which the limit was reached.

In order to ensure that all fields on the new rows in the contract limit and fee detail line are updated correctly, you must run the new Limits process, specifying the *Recalculate Totals Only* option.

To update Limits totals:

1. Select Customer Contracts, Update Contract Progress, Process Limits.
2. Enter a run control ID.
3. Select the *Recalculate Totals Only* and *Process Billing* options.

Note. The Process Billing Option will be available based on whether you have selected to separate Billing and Revenue. The option to separate Billing and Revenue is found by selecting Set Up Financials / Supply Chain, Install, Installation Options, Contracts, Other Installed Options Group Box.

4. Specify additional selection criteria as needed, and click Run.
5. Specify the server, and then click OK.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 5-33-2: Running the Limit Amount Report

After updating the Limits totals, you should now run the Limit Amount report to ensure that your limits have been converted and updated correctly. To run the report, select Customer Contracts, Reports, Limit Amount. Note that the selection criteria for the Limit Amount report have changed for the new PeopleSoft release. This includes the ability to specify whether the report should be run to allow only transactions with an excess to be reported or to allow only transactions with a remaining amount to be reported.

If you select *remaining amount*, you must then specify the maximum remaining percent, which allows only transactions that are within a certain percentage of reaching the limit to be reported. This option is essentially replacing the *%of Limit Already Billed* option. However, because of the addition of the *Report By* option, it does not make sense to upgrade the existing percentage field to the new maximum percentage field.

Because of this, you should review all the new selection criteria prior to running the new limits report for the first time.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Contracts	All	All

Task 5-33-3: Setting Up Billing Summarization

You may have some Amount-based Contract lines for which you deleted the summarized Bill Plan lines and replaced them with individual Bill Plan lines in the Chapter 1 task Processing Bill Plans.

Note. If you do not want to set up summarization for the Contract lines for which you deleted summarized Bill Plan lines in the Chapter 1 task Processing Bill Plans, or you did not have any Contract lines that required summarized Bill Plan lines to be deleted, you can skip this step.

To set up Bill Plans for summarization:

1. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Configuration ID.
2. Define summarization IDs.

Note. SUM_GROUP_ID, SUM_GROUP_TYPE, SUM_TEMPLATE_ID must be defined on any summarization IDs that will be used on Fixed Fee Bill Plans (Milestone, Immediate, Percent Complete).

3. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Group.
4. Define summarization group types and identifiers.
5. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Template, General Definitions.
6. Define summarization templates.
7. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Template, Group Header.
8. Define summarization group headers.
9. Select Set Up Financials/Supply Chain, Product Related, Billing, Summarization Template Config, Summarization Template, Group Detail.
10. Define summarization group detail.
11. Select Customer Contracts, Review Billing, Plans.
12. Open the appropriate Bill Plans and assign summarization templates to the Bill Plan lines.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Billing	All	All

Task 5-33-4: Reviewing Contracts Rate Plans

In the new PeopleSoft release, Contract Header Burden Plans are converted into rate plans. If there is a contract line rate template and more than one applicable burden plan for that contract line, then all rate information was removed from the contract line during the upgrade. Because it was not possible to know which of the possible burden plans should be combined with the rate template to create a new rate plan, all rate information was removed from these contract lines so that further analysis could be performed. This situation would occur if there is more than one activity linked to a contract line and each activity had a different burden plan prior to conversion, or more than one project is linked to a contract line and each project had a different burden plan (with no activity level burden plans). You can review the list of contract lines that meet this criteria in the record UPG_PC_CONT_TMP, which was populated during the conversion.

To review the list of contract lines that meet this criteria:

1. Use the query tool of your choice to display all rows on UPG_PC_CONT_TMP.
2. Use the table below to review the list:

Field	Definition
CONTRACT_NUM	Contract Number
CONTRACT_LINE_NUM	Contract Line Number

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Contracts	All	All

Task 5-34: Setting VAT Processing

This section discusses:

- Updating VAT Defaults
- Updating VAT Entity Report Options

Task 5-34-1: Updating VAT Defaults

In the new PeopleSoft release, a new declaration point, Declaration at Accounting Date, has been added. You may specify this new declaration point as the default for both goods and services throughout the VAT defaulting hierarchy. You may also specify that VAT be recorded on advance payments when the declaration point for the advanced payment is accounting date.

To update VAT defaults:

1. Select Set Up Financials/Supply Chain, Common Definitions, VAT and Intrastat, Value Added Tax, VAT Defaults.
2. Select the VAT Driver, VAT Entity Registration.
3. For each VAT Entity, for each country, complete the following steps:
 - a. Select the *VAT on Adv Pay — Acctg in AP* check box if you want VAT to be recorded on advance payments in Accounts Payable when the declaration point for the advance payments is set to At Accounting Date.
 - b. Clear the *VAT on Adv Pay — Acctg in AP* check box if you do NOT want VAT to be recorded on advance payments in Accounts Payable when the declaration point for the advance payments is set to At Accounting Date.
 - c. Select the *VAT on Adv Pay — Acctg in AR* check box if you want VAT to be recorded on advance payments in Accounts Receivable when the declaration point for the advance payments is set to At Accounting Date.
 - d. Clear the *VAT on Adv Pay — Acctg in AR* check box if you want VAT to be recorded on advance payments in Accounts Receivable when the declaration point for the advance payment is set to At Accounting Date.
4. Return to the Search dialog for VAT defaults.
5. For each of the following VAT drivers, for each country, set the default VAT Declaration Point for Goods to At Accounting Date (optional):
 - VAT Entity Registration
 - Order Management Business Unit
 - Billing Business Unit
 - Receivables Options
 - Asset Management Business Unit
 - Purchasing Options
 - Payables Options
 - Customer
 - Customer Location
 - Vendor
 - Vendor Location
 - Bill Source
 - Bill Type
 - Voucher Origin
 - Control Group
6. For each of the following VAT drivers, for each country, set the default VAT Declaration Point for Services to At Accounting Date (optional):
 - VAT Entity Registration
 - Order Management Business Unit
 - Receivables Options

- Purchasing Options
- Payables Options
- Customer
- Customer Location
- Vendor
- Vendor Location
- Bill Source
- Bill Type
- Voucher Origin
- Control Group

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-34-2: Updating VAT Entity Report Options

In the new PeopleSoft release, a new VAT Transaction report has been added which assists in reconciling and auditing your VAT return. This report is based on the existing VAT report definitions and is run from the existing VAT Return and Report run control component. However, before you can run this report for any given VAT Entity, you must link the report to the VAT Entity.

To link the VAT report to the VAT entity:

1. Select Set Up Financials/Supply Chain, Common Definitions, VAT and Intrastat, Value Added Tax, VAT Entity.
2. For each VAT Entity, for each registration country, complete the following:
 - a. Click on the VAT Report Details link.
 - b. Within the VAT Reports scroll area, click on the plus button to add a new row.
 - c. For the new row, select *Application Engine* for Process Type.
 - d. Select *LC_RPT_VAT* for the process name.
 - e. Click OK to return to the main VAT Entity page.
3. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-35: Stamping the Database

In this step, you set the database to the release level of the Demo database. The values you enter here appear whenever you view the Help, About PeopleTools dialog.

To stamp the database:

1. Launch Application Designer on your Copy of Production database using the new PeopleSoft release.
2. Select Tools, Upgrade, Stamp Database...
3. Fill in all three of the PeopleSoft Release fields with the appropriate value for your product line and release number:
4. In the Service Pack field, enter the service pack number to which you are upgrading. For example, if you are upgrading to SP2, enter the number 2. If you are upgrading to a release that is not at a service pack level, enter 0.
5. Click Stamp.
6. Close Application Designer.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

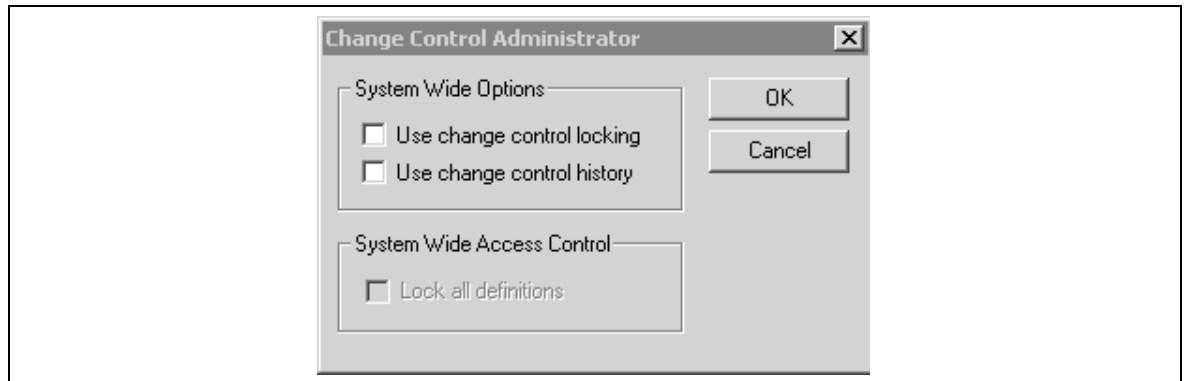
Task 5-36: Reviewing Change Control

Earlier in the upgrade process, in the beginning of the chapter “Apply PeopleTools Changes,” the Change Control feature was disabled. In this step, you re-enable Change Control, if your site uses this functionality.

To turn on Change Control:

1. Sign on to the Target database using Application Designer.
2. Select Tools, Change Control, Administrator.

The following dialog box appears:



Change Control Administrator dialog box

3. Set Use change control locking and Use change control history according to your site specifications.

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are only executed during the initial pass, and the feature is only disabled during the initial pass. If you enable the feature at this point, it will remain enabled during future test Move to Production passes.

See “Apply PeopleTools Changes,” Turning Off Change Control.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 5-37: Backing Up Before Testing

Back up your Copy of Production database now. This enables you to restart your upgrade from this point, should you experience any database integrity problems during the remaining tasks in the upgrade process.

See Appendix: “Planning for Upgrade Testing.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-38: Testing Your Copy of Production

In this task, you test your Copy of Production. Testing your Copy of Production will ensure that you can still operate your day-to-day processes on your new release. After you have reviewed your DDDAUDIT and SYSAUDIT, verify that the system is working properly by reviewing the system online. After you are comfortable that the system is working properly, you can perform the Test Move to Production upgrade pass.

See Appendix: “Planning for Upgrade Testing.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 6

Apply Changes to Production Database

This chapter discusses:

- Understanding the Move to Production
- Testing the Move to Production
- Testing Once More
- Performing the Move to Production
- Completing the Upgrade Survey

Understanding the Move to Production

Once you complete all of the necessary tasks to launch your system into production, you are ready to begin your Test Move to Production passes or to move your system into production.

Task 6-1: Testing the Move to Production

This section discusses:

- Understanding the Move to Production Test
- Understand Move to Production
- Creating a New Change Assistant Job

Understanding the Move to Production Test

Everything you have done to this point is the initial pass of the upgrade process. Now you are ready to start the Test Move to Production pass. The initial pass is very time consuming and requires a lot of analysis at different steps of the process and to troubleshoot issues. The Test Move to Production pass is a different series of steps, which includes a subset of the previous tasks, and takes advantage of the tasks performed during the first upgrade pass.

You should perform as many test moves to production as necessary to work out any issues and to be comfortable with the process. During each Test Move to Production you will be able to refine the process so that you can save time and avoid manual processes. These test passes will also let you know how long the process takes so you can plan your production downtime for your move to production weekend.

Task 6-1-1: Understand Move to Production

The following text is a high level view of what you will be doing in the Move to Production test pass. The remaining steps in this task will prepare your test environment. For example, you may need to move some scripts generated in the initial pass to a new Change Assistant staging directory. Next you will create a new Change Assistant job, setting the Type of Upgrade to Move to Production. That will give you a job with steps filtered with only those steps that apply to the Move to Production (MTP) test pass. From that point forward, you will simply follow the steps as they exist in your new job.

One of those first steps will be to take a Copy of Production. This second Copy of Production is sometimes referred to as the “New Copy of Production.” The first Copy of Production, or “old” Copy of Production, will now be the Source database (it was the Target database in the initial test pass). The New Copy of Production is now the Target database.

The steps executed in the MTP pass vary in several ways. Many of the tasks and steps in the initial test pass will be replaced in the MTP pass with Data Mover export and import scripts. In the initial pass, some steps required you to make functional decisions and take time to manually set up data. That data can be copied from the first database to the next, saving you setup time and eliminating the chance for manual error or typos.

Also, the MTP pass does not repeat the database compare/copy steps. You made the decisions once; there is no need to repeat these steps. Instead, a Data Mover script, MVPRDEXP, will export all the tables that contain the PeopleTools objects like records and PeopleCode from the first database. Another Data Mover script, MVPRDIMP, will import those tables into the second database. Anything you have done to PeopleTools objects while executing or testing the first pass—copied objects from DMO, reapplied customizations, applied updates from the PeopleSoft Customer Connection website—will be moved to the second Copy of Production with these scripts.

Another important difference with the MTP pass is the handling of SQL scripts that create and alter tables. In the initial pass, you generated the SQL scripts, sometimes edited the SQL script, and then executed the SQL scripts. In the MTP pass, you may be able to skip the generation steps and use the SQL you previously generated. This is another way to save time in your critical go-live window and is the ultimate goal, but it is an incremental process to get to that point.

In the first MTP pass, everyone must regenerate the SQL. There are small differences between the initial and MTP passes that require the SQL to be regenerated in at least one MTP pass. The Change Assistant Templates are delivered with the steps set this way.

In subsequent MTP passes, you may choose to “turn off” the generation steps if possible. If you have not changed any records at the end of one MTP pass, then you can reuse the SQL in your next pass. If you have done anything to change records, you should generate SQL again. This can include things like applying PeopleTools upgrades (for example, 8.47 to 8.48), or applying updates from the PeopleSoft Customer Connection website that involve record changes, or making additional customizations to records.

If you choose to skip some of these steps, do one of the following: mark the step complete in your job, or change the step properties in the template, so the step will never show up in your MTP filtered job again. To change the step properties, double-click on the step to open the Step Properties dialog, and change the Type of Upgrade to Initial Upgrade. In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. Change Assistant will look for the SQL scripts in the output directory set on the job’s Database Configuration, so make sure it will find them when it tries to run them.

The steps that are eligible for this treatment will contain Move To Production documentation notes indicating such.

Note. If you have made any changes to your trees, tree structures, or PS/Query objects since the upgrade began, you may want information on how to preserve those changes.

See Appendix: “Preserving Queries and Tree Objects.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-1-2: Creating a New Change Assistant Job

You need to create a new Change Assistant Job for each test Move to Production pass.

To create a new Change Assistant job:

1. PeopleSoft recommends that you use new output and stage directories for each new test pass. Create those directories now.
2. From Change Assistant, select Tools, Options and specify the new output and staging directories on the Change Assistant Options page.
3. Select File, Open Environment and select the environment.
4. Review the configuration on the General Settings window.
The Database Type, Language and SQL Query Executable will be the same as your previous job. Make changes to the PS_HOME settings, if necessary, and select Next.
5. Specify the Source Database setup information and click Next.
This is the Copy of Production database from your previous pass.
6. Specify the Target Database setup information and click Next.
This is the new Copy of Production database.
7. Review the environment configuration on the Confirm Selections window and click Next to save the changes to the environment.
8. Select File, New Job.
9. Select the template on the Use Template window and click OK.
10. On the Type of Upgrade window, select Move to Production.
11. Click OK.
A new upgrade job using the naming convention of *Template_Environment_Move to Production* is created.
12. Highlight the job name and select Edit, Set Documentation Directory, then select the directory where the documentation is located and click OK.
If you have been using documentation printed from the filtered view on the jobs, print the documentation again. The steps for Move to Production are different than in the initial pass.
13. Select View, Documentation.
14. Select View, Expand All to display all the steps in the job that apply to your upgrade.
The job will contain steps that were not in the initial upgrade pass and will exclude some steps that were in the initial upgrade pass based on the step properties.

Now you are ready to run the job.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-2: Testing Once More

As in any implementation project, you must consider planning, resources, development, and training. Testing also needs to be an integral part of your implementation project. Testing your database once more, after you have completed the upgrade, ensures that you can still operate your day-to-day processes on your new PeopleSoft release.

The level of testing in this task will focus primarily on the strategies to employ before moving into production.

See Appendix: “Planning for Upgrade Testing.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 6-3: Performing the Move to Production

When you are ready, you can move the system into production. Take your system out of production and perform all of the steps involved in testing the Move to Production against your production database.

See Testing the Move to Production

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

Task 6-4: Completing the Upgrade Survey

We are interested in feedback on your upgrade experience and any thoughts and/or suggestions you have on how we can improve the process in the future. Note that this survey should only be accessed once you have completed your upgrade and are in production on the new release.

See Also

<http://www.peoplesoft.com/go/upgradesurvey>

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	All	All	All

CHAPTER 7

Appendices

Understanding Appendices

The appendices portion of this documentation contains information you may need for your upgrade. The appendices have been referenced throughout the upgrade documentation for further understanding of the upgrade you are performing. PeopleSoft recommends that you read each appendix as it is referenced in the documentation.

APPENDIX A

Applying Fixes Required for Upgrade

This appendix discusses:

- Preparing to Apply Fixes
- Applying Fixes During Installation
- Applying Fixes After Copying Project
- Applying Fixes After Data Conversion
- Applying Fixes Between Upgrade Passes
- Applying Fixes in Move to Production

Task A-1: Preparing to Apply Fixes

This appendix gives general instructions for applying a Required for Upgrade fix for your upgrade. If the directions given in a particular fix are different from those given here, then follow the instructions in the fix.

It is important that you run your upgrade using the latest versions of all upgrade software. In Customer Connection, check the Upgrade page and the Updates and Fixes page to ensure that you have all of the latest code.

Ideally, you should follow the steps below to apply the various files and fixes.

To apply files and fixes:

1. Install the new release from the CD.
2. Apply any additional scripts and projects from the Customer Connection Upgrade page to your new release codeline (and to the New Release Demo database, if applicable).
3. Apply any other Required for Upgrade fixes from Customer Connection's Updates and Fixes to your new release codeline (and to the New Release Demo database, if applicable).
4. Run your initial pass of the upgrade.
5. Before you begin each subsequent upgrade pass, check the Upgrade page for new versions of any files you previously applied. Then check Updates and Fixes for any new Required for Upgrade fixes.

Your initial upgrade pass will differ from your subsequent test Move to Production passes. Some of the upgrade tasks and steps are common to both the initial upgrade pass and the Move to Production pass. For this reason, you may find Required for Upgrade fixes that do not apply to the upgrade pass that you are currently performing. The details provided with each fix will help you determine whether to apply the fix and when to apply it. The fix will also tell you what to do if you have already passed the step for which the fix is needed.

How you apply a fix depends on where you are in the upgrade process. This appendix explains how to apply a typical fix, and is organized by the various points within the upgrade where you will apply fixes.

Task A-2: Applying Fixes During Installation

In the chapter, “Install the Software” of *Getting Started on Your PeopleSoft Upgrade*, you should first download and apply all files and objects from the Upgrade page on Customer Connection. Then you must download all Required for Upgrade fixes from Updates and Fixes on Customer Connection. You can use the instructions in this section to apply any additional fixes that are posted, until you reach the task, “Running New Release Compare Reports.”

If a fix contains a project that needs to be copied from a file, apply it to your New Release Demo database during installation. If the project contains changes for Records or Fields, those objects will be updated during the normal compare and copy steps in the upgrade. You will not have to build objects in the project separately or consider whether it will have impact on customizations. You will do that with the rest of the objects during the upgrade. Apply as many of the fixes as you can at this time.

To apply script fixes during installation:

1. Download Required for Upgrade Change Package(s) using the “Download Change Package” functionality in Change Assistant.
2. Use Change Assistant to install/apply the update(s) into your New Release Demo database. Review the documentation included with each update prior to applying each update. There may be manual steps that need to be performed in order to successfully apply the update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, “Applying Updates.”

Task A-3: Applying Fixes After Copying Project

It is best not to apply fixes during the Compare and Copy tasks in the “Run and Review Compare Reports” and “Apply Application Changes” chapters of the initial upgrade pass. It can also be cumbersome to apply record and field changes during the Creating and Altering of tables in the “Complete Database Changes” chapter. It is, therefore, best to wait until just before the “Running Data Conversions” task in the “Apply Application Changes” chapter to apply additional fixes. Most of the fixed objects will be data conversion code, delivered in projects.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade Change Package(s) using the “Download Change Package” functionality in Change Assistant.
2. Use Change Assistant to install/apply the update(s) into your New Release Demo database for this upgrade pass. Review the documentation included with each update prior to applying each update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, “Applying Updates.”
3. The project is now loaded on your New Release Demo database. You should run a project compare to make sure the objects in the fix will not overwrite any of your customizations. If

you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.

4. If you are performing a Move to Production upgrade pass, first migrate the Change Package(s) into the Source database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the Change Package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply them to your Source database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, “Applying Updates.”

5. Migrate the Change Package(s) into the Target database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Target database.

Task A-4: Applying Fixes After Data Conversion

At this point, you have already converted all of your data for the upgrade pass, and you cannot apply Application Engine program fixes and use them in this upgrade pass. You should refer to the fix instructions to determine what to do in each case. Often, the instructions say that you need to restore your database from a pre-conversion backup and rerun data conversion to get the benefits of the fix. Since this is the only way you can get the fix onto your current Copy of Production, you may decide to allow the error and not apply the fix until you do a test Move to Production. Then after you have completed that test pass, you can test the affected function. However, you should not do this if your next pass is your final Move to Production, and you are going into production with the resulting database. You should always test your upgraded database between test passes if changes have been made to procedures, scripts, or programs. You do not want any surprises during the final Move to Production.

Task A-5: Applying Fixes Between Upgrade Passes

You can apply fixes just before you start a test Move to Production pass in the same way you would in the step above, Apply Fixes After Copying Project. In those instructions, you apply the fix to your New Release Demo database and compare it to the Copy of Production. Make sure that you do the database comparison in order to verify that the fix does not wipe out any customizations you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database. Then apply the fix to your Copy of Production, which you will use as the Source database in the test Move to Production. The fix will then get moved to your New Copy of Production when you run the MVPRDEXP.DMS and MVPRDIMP.DMS scripts in the “Apply PeopleTools Changes” chapter.

Task A-6: Applying Fixes in Move to Production

Once you have started a test Move to Production, do not apply any fixes until just before data conversion. Apply any fixes using the step above, Applying Fixes After Copying Project. In those instructions you apply the fix to your New Release Demo database and compare it to your Copy of Production. Instead of using the original Copy of Production as the Target, you must now use your New Copy of Production, the one defined as the Target in your Move to Production Change Assistant job. Be sure to do the database comparison to verify that the fix does not wipe out any customizations you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database, then copy the project to your New Copy of Production.

APPENDIX B

Changing the User Interface

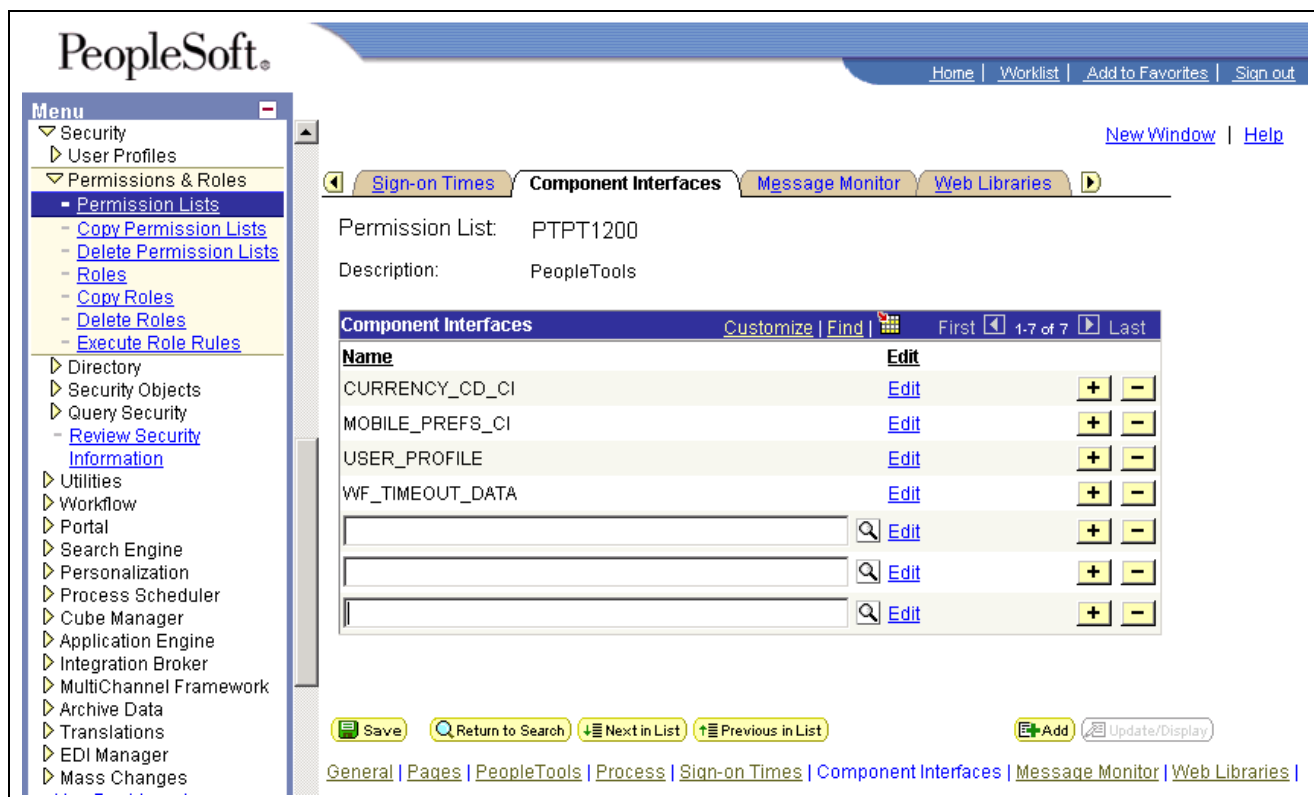
This appendix discusses:

- Change the User Interface
- Change the User Interface for Mobile

Task B-1: Change the User Interface

Three user interface options were delivered with your current release of PeopleSoft 8.x. The classic style, the style seen in previous releases of your PeopleSoft application, is set as your default style. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The classic style, shown below, is set as your default style delivered with your PeopleSoft release.



The classic style user interface option

The following example represents the light blue style.

The screenshot shows the PeopleSoft web interface with a light blue theme. The left-hand menu is expanded, showing the 'Permissions & Roles' section with 'Permission Lists' selected. The main content area displays the 'Component Interfaces' for 'PTPT1200' (PeopleTools). The table lists several interfaces with 'Edit' links and '+' and '-' buttons. The bottom navigation bar includes links for 'General', 'Pages', 'PeopleTools', 'Process', 'Sign-on Times', 'Component Interfaces', 'Message Monitor', and 'Web Libraries'.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Help

Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries

Permission List: PTPT1200
Description: PeopleTools

Component Interfaces		Customize	Find	First	1-7 of 7	Last
Name	Edit					
CURRENCY_CD_CI	Edit				+	-
MOBILE_PREFS_CI	Edit				+	-
USER_PROFILE	Edit				+	-
WF_TIMEOUT_DATA	Edit				+	-
	Edit				+	-
	Edit				+	-
	Edit				+	-

Save Return to Search Next in List Previous in List Add Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries |

The light blue style user interface option

This example represents the dark blue style.

The screenshot shows the PeopleSoft web interface with a dark blue theme. The layout is identical to the light blue version, but the color scheme is darker. The left-hand menu is expanded, showing the 'Permissions & Roles' section with 'Permission Lists' selected. The main content area displays the 'Component Interfaces' for 'PTPT1200' (PeopleTools). The table lists several interfaces with 'Edit' links and '+' and '-' buttons. The bottom navigation bar includes links for 'General', 'Pages', 'PeopleTools', 'Process', 'Sign-on Times', 'Component Interfaces', 'Message Monitor', and 'Web Libraries'.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Help

Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries

Permission List: PTPT1200
Description: PeopleTools

Component Interfaces		Customize	Find	First	1-7 of 7	Last
Name	Edit					
CURRENCY_CD_CI	Edit				+	-
MOBILE_PREFS_CI	Edit				+	-
USER_PROFILE	Edit				+	-
WF_TIMEOUT_DATA	Edit				+	-
	Edit				+	-
	Edit				+	-
	Edit				+	-

Save Return to Search Next in List Previous in List Add Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries |

The dark blue style user interface option

See the Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer for your new release.

To change your styles, you must delete the substyle sheets associated with the classic style and replace them with either the light or dark blue substyle sheet.

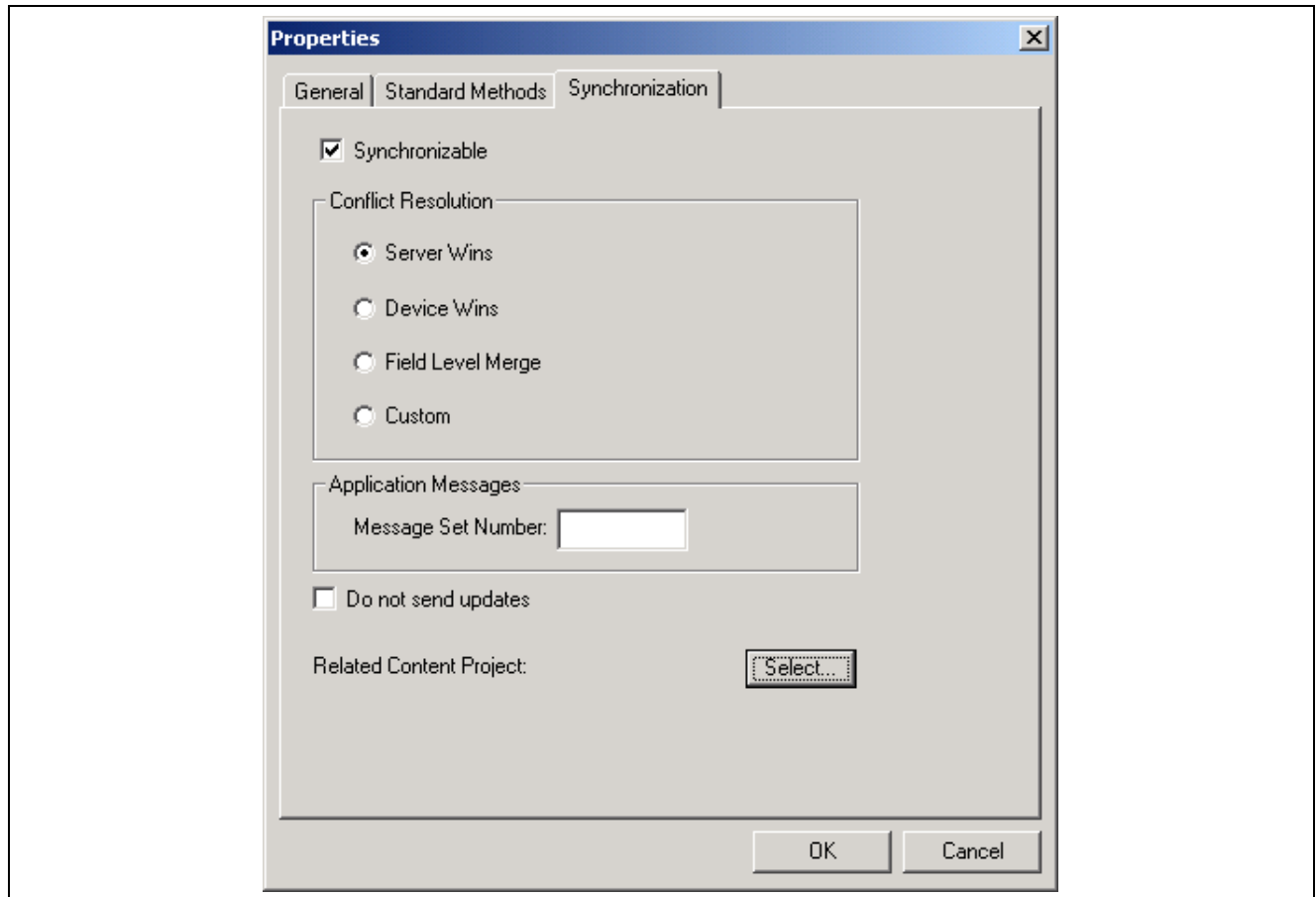
Note. The new user interface looks are supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If using a browser and release other than these, the system defaults to the classic style.

To enable one of the new user interface looks:

1. In Application Designer, open the stylesheet PSSTYLEDEF.
2. Click on the PSALTERNATE Sub Style Sheet, and press Delete.
3. Select Insert, Insert Sub Style Sheet.
4. Select PSALTERNATE_LIGHTBLUE or PSALTERNATE_DARKBLUE.
5. Repeat steps 1 through 4 for the PTSTYLEDEF and PSACE Sub Style Sheets, making sure to use the same extension (_LIGHTBLUE or _DARKBLUE) as you did for PSALTERNATE.
6. Select Save.
7. Open the stylesheet PSQUERYSTYLEDEF.
8. Click on the PTQUERYSTYLESUB Sub Style Sheet, and press Delete.
9. Select Insert, Insert Sub Style Sheet.
10. Select PTQUERYSTYLESUB_LIGHTBLUE or PTQUERYSTYLESUB_DARKBLUE. Use the same extension as you did in Step 4.
11. Select Save.

Task B-2: Change the User Interface for Mobile

You use Related Content Projects to synchronize extraneous PeopleTools objects to a mobile device. In particular, you can use a Related Content Project to synchronize a new or customized stylesheet to the mobile device. Related Content Projects are associated with a Component Interface. PeopleSoft recommends that you associate a given Related Content Project with a synchronizable Component Interface that is common to your mobile application.



The Synchronization tab

To change the user interface look for mobile applications:

1. Follow the procedure above to add the new or customized stylesheet to a PeopleTools Project.
2. In Application Designer, open a synchronizable Component Interface that is common to your mobile application.
3. Open the Properties dialog box from the pop-up menu.
4. Select Synchronization.
5. Click Select for the Related Content Project.
6. Find and highlight the desired project and click Select.
7. Select Save.

The stylesheet will be synchronized to the mobile device during the next Bootstrap or Update Applications synchronization.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces for your new release.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent for your new release.

APPENDIX C

Improving Performance

This appendix discusses:

- Understanding Performance Improvement
- Planning Your Upgrade for Performance
- Performing the Upgrade
- Improving Performance for Your Platform
- Consulting the Global Support Center

Understanding Performance Improvement

Performance is always a challenge when you are upgrading. Much of the data currently in your database will be affected. No other batch processing works quite like it. Upgrade performance is sensitive to your unique environment and data. These performance recommendations are designed to help you improve performance during your upgrade.

Task C-1: Planning Your Upgrade for Performance

Review the following guidelines to help plan for better upgrade performance:

- Provide as much hardware, memory, and disk space as you can.
- Run long processes on a dedicated server, not the client. Configure that server similarly to your production environment.
- Size the Copy of Production database (Target) like your production database — allow for growth.
- Use a dedicated workstation, configured like the production environment.
- Provide an application server and process scheduler for the Target database on the new PeopleSoft release.
- Look for fragmented tables. Resize or reorganize the initial and next extends accordingly.
- Know which tables are your largest. This information will be valuable during the upgrade.

Task C-2: Performing the Upgrade

This section discusses:

- Verifying the Database Structure Task
- Creating and Altering SQL Scripts
- Performing Data Conversion

Task C-2-1: Verifying the Database Structure Task

When performing the “Modifying the Database Structure” task, perform all recommended update statistics, so the optimizer can make a good decision.

Task C-2-2: Creating and Altering SQL Scripts

The following list provides tips to use when performing the “Modifying the Database Structure” task.

- Perform all recommended update statistics, so the optimizer can make a good decision.
- Look for large tables that are being altered. Create separate scripts for each of these tables and run the script concurrently with your other alter scripts. You can run these concurrently even if you are using the Alter by Rename build option because each table creation uses an independent temporary table name in the new PeopleSoft release (PSYrecname).
- Run your create table script concurrently with the alter tables without deletes script.
- Some indexes will not create during alter without deletes because of a unique key violation. You can expect this because index structures have changed. The data in these indexes will be corrected during data conversion. You can create the index as a non-unique key for data conversion. Create this non-unique index, without the field that caused the error, so that data conversion does not have to update the index as well as the data pages as it corrects the data in this field.

Task C-2-3: Performing Data Conversion

PeopleSoft delivers the Change Assistant templates to run the steps on the client by default. The server can run Application Engine programs. You may want to run these programs on the server to increase performance. Change Assistant uses the PSEMHUB and PSEMAgent to execute jobs to the server. You will need to configure and start your Environment Management Hub and Agent, enter the Environment Management information into the Change Assistant options, set your Change Assistant mode, check the Perform Server Processing check box, and modify the run location of the steps you wish to run on the server. Consider running data conversion application engine programs concurrently as they were designed with no dependencies between programs. Any exceptions to this are noted in the documentation. If you would like to take advantage of concurrent processing, modify the step properties and set the Run Concurrently option to Yes.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release.

Task C-3: Improving Performance for Your Platform

This section discusses:

- Using Oracle
- Using DB2

Task C-3-1: Using Oracle

You should use the cost-based optimizer during the upgrade. The application engine scripts use MetaSQL to run the update statistics command at various times during data conversion. If you are running the rule-based optimizer, you will not take advantage of these statements.

When running the alter scripts, remember the Oracle hint `/*APPEND*/`. This command will improve the performance of your alter script if you are doing an “Alter by Rename.” This hint performs like an Oracle Direct Load Insert and does not capture redo or recovery information. The syntax is as follows:

```
INSERT /*+ APPEND */ INTO TABLENAME (FIELD1, FIELD2, ...
```

Make sure your database administrator has turned autoextend on. Autoextend allows tablespaces to grow larger than their set maximum size and will be useful during the upgrade process since tablespaces grow several times larger than they would in production.

Alter the tablespace for PSIMAGE and increase it to 200 MB; autoextend on the next 10 MB; set the maxsize to *unlimited*.

Task C-3-2: Using DB2

Perform all recommended update statistics on the system catalog as well as the application tablespaces.

Interspersed throughout the Application Engine data conversion programs are steps that make a dynamic call for RUNSTATS to be performed against selected tables. An example of how this is used follows:

- Step01 - Start with an empty Temp_Table_TAO.
- Step02 - INSERT 60,000 rows into the Temp_Table_TAO.
- Step03 - Application Engine Step calls %UpdateStats(Temp_Table_TAO).
- Step04 - You can now perform SQL against Temp_Table_TAO using new statistics.

This will allow you to use indexes when processing against Temp_Table_TAO. If DB2 z/OS is not configured correctly, Application Engine programs skip these steps and the performance of the SQL steps that follow will suffer.

In order to take advantage of the %UpdateStats feature, at least one of these conditions must be met:

- You implemented the DSNUTILS stored procedure.
- You followed the enhanced installation path.

See the Enterprise PeopleTools Installation for DB2 UDB for z/OS for your new release.

Note. If you disable the %UpdateStats feature of Application Engine, it will adversely affect the performance of your data conversion programs, because statistics will not update when the tables are loaded with large volumes of data.

Task C-4: Consulting the Global Support Center

If you do have a problem with your upgrade, contact the Global Support Center (GSC). PeopleSoft will be able to give you a solution to the problem faster if you supply the following information:

- Include details about the table row counts and indexes available on the tables involved in the processing:
 - Include indexes in your physical database, not those defined in Application Designer.
 - Mention any additional indexes that you custom-added; they could be getting in the way.
- Include RDBMS (Oracle, SQL Server, or DB2, and so on) and RDBMS release (for example, Oracle 7.3 or 8.16).
- If you are running on Oracle, specify whether you are running in cost-based or rule-based mode.
- Include the PeopleSoft upgrade path for both PeopleTools and the application.
- Provide trace files: PeopleTools trace and RDBMS-specific trace files, SQL explains, and so on.

APPENDIX D

Planning for Upgrade Testing

This appendix discusses:

- Understanding Testing Techniques
- Deciding When to Test
- Evaluating Your Testing Requirements
- Defining Your Testing Strategy
- Determining the Testing Conditions
- Developing Your Test Plan
- Developing Test Scripts
- Reviewing Tips and Techniques

Understanding Testing Techniques

As with any project, testing is a critical part of your upgrade project. With proper testing, you can ensure that you upgrade successfully and you are ready for your Move to Production.

Upgrades vary in complexity and scale from release to release and customer to customer, so the testing periods and the activities required to perform testing vary from upgrade to upgrade. Because PeopleSoft cannot anticipate how every organization uses the system to fit their own business practices, including customizations and data setup, PeopleSoft does not deliver upgrade test scripts. However, there are some general testing guidelines that you can follow to assist with your upgrade testing. In this section, you will find information that will help you plan your testing efforts.

Task D-1: Deciding When to Test

An effective testing strategy involves an understanding of the stages of a PeopleSoft upgrade and where, within these stages, testing should be performed. You can take more than one approach and use more than one method to test your upgrade.

Task D-2: Evaluating Your Testing Requirements

To evaluate your testing requirements, you need the following information:

- The number of products and modules you currently have in your production database.
- The number of customizations you have in your production database.
- The functional design and business requirements addressed by each customization.
- Your online, batch, and reporting business processes that you want to include in testing.

Task D-3: Defining Your Testing Strategy

This section discusses:

- Understanding Your Testing Strategy
- Evaluating Unit Testing
- Evaluating System Testing
- Evaluating Integration Testing
- Evaluating Parallel Testing
- Evaluating Performance Testing
- Evaluating User Acceptance Testing
- Evaluating Regression Testing

Understanding Your Testing Strategy

Once you evaluate your testing requirements, you can determine what types of testing you need. You should define the tests to be performed for the project and the goals of each test—including roles and responsibilities, test-case management, control points, and success criteria. In addition, you should define and document the scope of each type of testing. Use the definitions below to determine the levels of testing required in your organization.

To ensure upgrade success, be sure to train upgrade members before the upgrade. It is critical to have educated testers to ensure adequate test coverage of new functionality.

Task D-3-1: Evaluating Unit Testing

In this stage of testing, you have completed your upgrade tasks and your database is now at the new release level. However, you should unit test before you use the new system. Unit testing validates data, business rules, and business process requirements. In addition, it ensures that business processes work as designed and your database is ready for full functionality testing. The processes for performing unit testing are described below:

- Test individual online transactions and batch processes on the upgraded database.
- Validate data converted during the upgrade.
- Verify that you can access existing data and enter new data successfully.

- Test customizations reapplied to the upgraded database.
- Each customization is tested individually along with all related processes.
- Business processes are not tested.
- Test scripts are not required.
- Test – Document – Resolve issues – Retest.

Task D-3-2: Evaluating System Testing

System testing ensures that all business functions and processes execute appropriately from the customer's view. Business processes are tested from beginning to end during system testing; this is sometimes referred to as end-to-end testing. The processes for performing system testing are described below:

- Create system test environment via a test Move to Production.
- Test inbound and outbound interfaces and related business processes.
- Test online business processes using relevant security (that is, user IDs, roles, and permission lists).
- Test batch business processes.
- Test reporting processes (SQR, PS/Query, nVision, and Crystal).
- Test customizations to business processes.
- Perform using test scripts.
- Compare expected results to actual results.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task D-3-3: Evaluating Integration Testing

After system testing, you perform integration testing. In this stage, you test business processes and groups of related business processes within the application to determine that they function as designed. In addition, you ensure that any design flaws are resolved before user testing. The following list of activities describes integration testing:

- Create integration test environment via a test Move to Production.
- Test specific business processes.
- Test integration between modules and business processes.
- Perform using test scripts.
- Compare expected results to actual results.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task D-3-4: Evaluating Parallel Testing

Parallel testing validates that the current production system and the upgraded database generate the expected results for specific business events. Parallel testing is optional, but frequently used to ensure that the new release will generate the same results given the same testing scenarios. The processes for performing parallel testing are described below:

- Create a parallel test environment via a test Move to Production.

The Copy of Production should be taken before the major business processes/events are executed so that the same processes can be run during the parallel test.

- Retain any output from production processes for later comparison.
- Run the same business processes/events in the upgraded database.
- Compare results generated in the production system with the results generated using the upgraded database.
- Perform using test scripts.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task D-3-5: Evaluating Performance Testing

You conduct performance testing to determine if the system can accomplish stated objectives within a specified time period. Performance of the current production system is often used as a baseline. The processes for performing performance testing are described below:

- Define performance objectives for each business process included in the scope of the test.
- Perform business process.
- Monitor performance.
- Compare actual performance and acceptance criteria.
- Perform using test scripts.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task D-3-6: Evaluating User Acceptance Testing

User acceptance testing determines if day-to-day users can complete daily work activities within the system with an acceptable level of effort. For example, run through business processes such as hiring, terminating, and paying an employee in Human Resources or creating, editing, and posting journals in Financials. The processes for performing user acceptance testing are described below:

- Functional resources should execute test scenarios (with their appropriate production security access to ensure they have access to all the components, pages, and processes used in their daily functions).
- Perform using test scripts.
- User testing should not be performed with developer or Super User access.
- Test – Document – Resolve issues – Retest – Test – Document – Sign off.

Task D-3-7: Evaluating Regression Testing

You perform regression, or re-testing, if problems were found and resolved or changes were made during any of the previous tests. This stage of testing validates the test Move to Production and Move to Production parts of the upgrade. When all the tests have received sign-off, you will use the initial Copy of Production to upgrade the production database/environment. You then perform a test move into the production environment and customers confirm that the test move executed successfully. At this point you conduct regression testing. The following tips will assist you with regression testing:

- Ensure that no new defects have been introduced during the move.
- Execute a predefined set of scripts to confirm the test move.

- Performed by Functional Resources before *Go Live*.
- Rerun scripts from previous testing.

Task D-4: Determining the Testing Conditions

After you identify the types of testing to include in your upgrade, determine conditions for each stage of testing. Be sure to test the actual test Move to Production to resolve any technical issues in the upgrade process itself in addition to performing functional application testing. Perform the following actions for each testing type:

- Determine criteria for successful completion.
- Determine which tests you can run concurrently and which you must run serially.
- Set up test plans and test scripts you will need.
- Define the testing environment.
- Define issue resolution procedures.
- Define change control and migration procedures.
- Define which third-party tools you must install and configure.
- Identify database maintenance procedures, for example, backup and refresh.
- Evaluate the need for a testing tool to aid in the testing process.

Task D-5: Developing Your Test Plan

If you have test plans from your implementation or previous upgrades, consider modifying them for this upgrade project, ensuring that you incorporate features and functions delivered with the new release. Use existing test plans and scripts wherever possible. Identify modifications during the fit/gap analysis and complete script generation during the initial upgrade. Based on the objectives and scope defined in your test strategy, identify the following items for each type of testing:

- Test procedures
- Assumptions
- Timing
- Deliverables
- Acceptance criteria
- Roles and responsibilities
- Resource requirements
- Training requirements
- Test environment
- Data requirements
- Issue and change control tracking procedures

- Testing Tools

Task D-6: Developing Test Scripts

The process of developing test scripts can assist with detecting problems in the requirements or design of an application. It requires thinking through the entire operation of the application. For this reason, you may find it useful to start preparing test scripts early in the upgrade cycle and, if possible, base them on existing test scripts from your implementation project or previous upgrade.

If you have test scripts from your original implementation, recycle them and modify them to accommodate new functionality. That way, you can be sure to cover your critical end-to-end business processes. You will also want to focus additional testing time on your customizations to verify that they have upgraded successfully.

If you do not have test scripts from your implementation, you can create them by documenting what you currently do within the system.

Create a test script for each business process to define the Action or Event, Input, and the expected result to determine if a feature of an application is working correctly. Functional people who are aware of current processes should write your test scripts. However, when writing test scripts, assume the person testing does not know how to use the system. Use the following procedure for developing test scripts:

- Test scripts should contain specifics, such as test identifier, test name, objective, test conditions and setup, input data requirements, steps, and expected results.
- Write as a step-by-step guide, stating what data should be entered, when, and where.
- Organize by module, business process, and process cycles.
- Create with full production security in mind.
- Create early in the upgrade process.

Make sure that your tests are consistent with the following tips:

- Action
 - Include the script name, description, and purpose.
 - Include the navigation steps within the PeopleSoft system.
 - Include navigation steps outside the PeopleSoft system.
- Input
 - Include security requirements: what User ID, Role, and Permission List should be used to perform the test.
 - Specify key data elements: entering new or accessing existing data.
- Results
 - Include the exact results.
 - Print screens to support the results and print the report output.

Task D-7: Reviewing Tips and Techniques

This section discusses:

- Reducing the Time of Upgrade Process
- Performing Testing on Up to Date Data
- Performing Test Move to Production
- Tracking Issues
- Reviewing Testing Tools
- Discussing Change Control
- Discussing Back Up Procedures
- Evaluating Unexpected Results
- Evaluating Reasons for Failure

Task D-7-1: Reducing the Time of Upgrade Process

All testing can be performed at the end, including running the tests on the current system to obtain results for comparison. One way to reduce the overall timeframe of an upgrade is to execute the tests on the current system while the upgrade is in progress. This way you will have the results ready when the upgraded database is to be tested. This can be achieved by taking two copies of the production database at the start of the upgrade. Only one copy is upgraded, while the other remains at current release. The testing time is now reduced to only performing the tests on one database.

After each test Move to Production, you may want to turn over the upgraded database to the testing team while the technical team begins a new iteration of the test Move to Production. Conducting the two efforts in parallel may decrease the overall time required to upgrade. Any issues that are found by the testing team can be incorporated into the newly upgraded database as soon as it is available.

One approach that may be used for the Move to Production is to run the production database and upgraded database in parallel to ensure that key business processes operate as expected. Although this may require dual maintenance of data during the parallel testing period, it may minimize the impact of the actual Move to Production. If you are interested in using this method, once you have performed a test Move to Production to your satisfaction, schedule the production cutover weekend. Then, perform the next test Move to Production during that weekend. Bring the existing production system back up and run the upgraded database concurrently. If, after comparing the outcome of your critical business processes, you are satisfied with the results, simply set the upgraded database to your production system. If you are not satisfied with the results, make the necessary adjustments and perform another test Move to Production.

Task D-7-2: Performing Testing on Up to Date Data

The previous technique will mean that testing is performed on *old* data. The copies of production may have been taken some weeks or months in the past. It will confirm that the data you started with has upgraded successfully. However, it may be required to perform the tests on the most recent data set as follows:

- Take a copy of production and upgrade
- Perform all phases of testing on the upgrade version up to unit testing
- Determine that the database is ready for full functionality testing

Task D-7-3: Performing Test Move to Production

Performing a test Move to Production is a good technique for assuring database readiness as follows:

- Take two up to date copies of the production database.
- Perform the test Move to Production steps to upgrade one of the databases.
- Execute test scripts on the remaining database.
- Perform tests on the upgraded database and compare results.

Task D-7-4: Tracking Issues

You should implement a method for tracking the tests and issues discovered during testing. Tracking issues and resolutions on a central document serves as a communication tool and minimizes duplication effort. The following tips should be considered while tracking issues:

- Categorize issues:
Critical, Major, Minor, Cosmetic
- Use a central document repository or tracking tool

Task D-7-5: Reviewing Testing Tools

SQA Robot :

- Records key strokes (like a macro recorder) into Visual Basic scripts.
- Useful for regression testing.
- SQA Manager—can be used to simulate multiple users.

Test Director by Mercury/Interactive:

- Tool that manages test scripts—tracks execution and defects.
- Useful for regression testing.

Task D-7-6: Discussing Change Control

Make sure that you have a procedure for implementing changes during the testing stage. You may have several databases, if server space permits. All changes should be made in a master database. If an issue is found during testing, the resolution should be applied to the master database and promoted via pre-defined migration procedures. Remember that a master database will also be required to perform the Move to Production.

Task D-7-7: Discussing Back Up Procedures

The following tips should be considered when backing up your data:

- Back up at baseline before testing (use a backup technique that will allow you to restore individual tables).
- Back up at key points for point in time testing.
- Implement refresh procedures to avoid duplicate data.

Task D-7-8: Evaluating Unexpected Results

In the event you receive unexpected results and you cannot determine their cause, attempt to replicate any issues you encounter in your Copy of Production database on a delivered Demo database. If the issue does occur on Demo, it should be reported to the Global Support Center. Check PeopleSoft Customer Connection to see if a fix has been posted to resolve the issue.

See PeopleSoft Customer Connection (Updates + Fixes).

Task D-7-9: Evaluating Reasons for Failure

The list below identifies reasons why your test plan might have failed:

- Testing strategy was poorly defined
- Test plans were poorly defined
- Test scripts were poorly defined
- Lack of resources and resource commitment
- Lack of understanding of the upgrade process

APPENDIX E

Preserving Queries and Tree Objects

This appendix discusses:

- Understanding Preserve Queries and Trees
- Preparing the Database
- Creating a New Project
- Comparing the New Project
- Copying the Project
- Testing the Project
- ReExporting the PeopleTools Tables

Understanding Preserve Queries and Trees

This appendix contains information for preserving queries, trees, and tree structures. At the beginning of your upgrade, you should have informed your end-users and development team that your PeopleSoft system was frozen, meaning that no changes should have been made to any PeopleTools tables or objects including queries, trees, and tree structures. The freeze on PeopleTools changes is important because you will lose any changes to these objects made during an upgrade to PeopleTools tables. Occasionally, however, end-users may have to make critical changes to trees, tree structures, and PS/Query objects. If this has happened in your system, you can perform a process to preserve those additions and changes to trees, tree structures, and queries. You will have to work with your end-users and developers to obtain a list of queries, trees, and tree structures that you need to preserve.

You will run through the test Move to Production (MTP) steps several times for practice and testing purposes. Please note that you have the option to perform the preserving queries and trees procedure during each of your test Move to Production runs, but you must perform it during the last run of the test Move to Production. If you do not perform this procedure during your last run to preserve the trees, tree structures, and queries that have been changed since the beginning of your upgrade, they will be lost.

Note. The process outlined in this appendix to preserve trees and queries should be performed prior to data conversion so that any additional conversion would be taken care of by the appropriate data conversion programs.

This appendix includes instructions to prepare your database and create a project on which to preserve your queries, trees, and tree structure changes.

Task E-1: Preparing the Database

In this step, you create a new copy of your current production database, perform steps on the new copy, and run scripts against the new copy to update the release level.

To prepare the database:

1. At the beginning of the test Move to Production, you should make a new copy of your current production database. To preserve queries and trees, you need to make not only that Copy of Production but also an additional copy of your current production database. For clarity, PeopleSoft refers to this additional copy of your production database as the Tree/Query Copy of Production database. So now you should have a Copy of Production database and a Tree/Query Copy of Production database.
2. Perform the test Move to Production on your Copy of Production database.
3. To obtain the queries and trees that you want to preserve, the Tree/Query Copy of Production database needs to be at the same release level as the Copy of Production database on which you just completed the test Move to Production. To update your Tree/Query Copy of Production to the same release, you run release scripts against this database. PeopleSoft refers to this as “reling up” the database. Use the Custom Compare template to “rel up” your database. Select the Product Line *PEOPLETOOLS* when configuring your Change Assistant job.

Task E-2: Creating a New Project

Now that your Tree/Query Copy of Production is at the same release as your Copy of Production database, you create a project in the Tree/Query Copy of Production that contains all of the queries and trees that you wish to preserve.

To create a new project:

1. Using PeopleTools 8.4x, sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch Application Designer.
2. Select File, New...
3. Select *Project* for Object Type.
4. Select File, Save Project and enter a project name; for example, *PRESERVED*.
5. Select the Upgrade tab in Application Designer.

Note. Queries and trees do not appear in projects under the Development tab in Application Designer. To see the queries and trees that you will insert into the *PRESERVED* project in the next step, you must make sure that you are using the Upgrade view of Application Designer.

6. Select Insert, Definitions into Project...
7. Select Queries from the Definition Type drop-down list box and click Insert.
8. Using your list of identified queries that need to be preserved, highlight each one of those queries from the Application Designer list.

You can highlight more than one by holding down the Control (CTRL) key while you click the name of the query.

9. After you have highlighted all of the queries that you want to preserve, click Insert, then click Close.
Under the PRESERVED project name in the Upgrade view of Application Designer, you will see Queries as an object type in the project.
10. Double-click on queries under the PRESERVED project to see a listing of all of the queries to preserve in the right-hand window of Application Designer.
11. Select File, Save Project.
12. Repeat steps 6 through 11 for trees and tree structures.
Now your PRESERVED project should contain all of the queries, trees, and tree structures that you want to preserve.

Task E-3: Comparing the New Project

In this step, you compare the queries, trees, and tree structures that are in your PRESERVED project against your Copy of Production database. Because the tree objects in your PRESERVED project are not comparable objects in Application Designer, you must manually compare the tree objects that you want to preserve. During the query and tree structure compare process, the Application Upgrade utility sets the project flags. These flags determine whether the following actions will occur:

- Changes will be performed on the Copy of Production (Target) database when you perform the export and copy.
- Changes will be tagged as *Copy* or *Delete* operations.
- The project flags will be set to automatically take these actions or not.

These settings are determined based on whether or not the objects in the project currently exist on the Copy of Production (Target) database.

To compare the new project:

1. Using PeopleTools 8.4x, sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch Application Designer.
2. Select File, Open...
3. For Definition, select Project and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Compare and Report.
6. Sign on to your Copy of Production.
7. From the Object Type box, select *Queries and Tree Structures*.
8. Click Options...
9. Select *PeopleSoft Vanilla* for the Target Orientation.
10. Select *Project* for the Compare Type.
11. Verify that the Compare Report output directory is set to the correct location.
12. Select the Report Filter tab and set the report filter check boxes appropriately for your compare.
13. Click OK.

14. Select Compare.
15. Review the compare reports for queries and tree structures. In addition, perform a manual compare of the trees that you want to preserve. Based on the results of this review, set the Action and Upgrade check box appropriately in the PRESERVED project.

Task E-4: Copying the Project

In the following steps, you copy the PRESERVED project to the Target database. This is the Copy of Production database on which you ran the test Move to Production.

To copy the project:

1. Using PeopleTools 8.4x, sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch Application Designer.
2. Select File, Open...
3. For Definition, select *Project* and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Upgrade, Copy.
6. Sign on to your Copy of Production database.
7. Make sure that the Reset Done Flags and Copy Project check boxes are selected.
8. Click Select All.
9. Click Copy.
10. Using the Upgrade view of the PRESERVED project in Application Designer, review the Done flags in the project to make sure that all of the objects that you wanted to preserve were copied to the Target database.

Task E-5: Testing the Project

Now that the queries, trees, and tree structures that you wanted to preserve are in the Copy of Production database, you must test and re-test and make any necessary changes if the test results are not what you expected.

Task E-6: ReExporting the PeopleTools Tables

Once you are satisfied with the test results, you must re-export the PeopleTools tables to actually preserve the queries, trees, and tree structures. During your test Move to Production, you ran MVPRDEXP.DMS to export the PeopleTools tables. You will use the output files created from running this job as input files during your Move to Production. Because these files were created before copying the queries, trees, and tree structures that you wanted to preserve, the files do not contain the preserved objects, so you must run the MVPRDEXP.DMS script again. Running the MVPRDEXP.DMS script again ensures that you have the most current PeopleTools tables.

To re-export the PeopleTools tables:

1. As a PeopleSoft user, launch Data Mover against your Copy of Production database and run the following script:

`\PS_HOME\SCRIPTS\MVPRDEXP.DMS`

2. Use the output files created during your final Move to Production.

APPENDIX F

Reviewing Tablespaces

Understanding Tablespace Review

This appendix lists the tables that previously existed in 4K pagesize tablespaces that now reside 32K pagesize tablespaces in the new release.

Task F-1: Reviewing Table Names

Task F-1-1: Reviewing 8.8x Table Names

Review the following 8.8x tables. .

- BL_EXS_DFLT_AET
- CP_EXPR
- CP_EXPR_FORMAT
- CP_INTRN_VAR
- CP_MESSAGE
- CP_MESSAGE_LANG
- CP_RULE_D_LANG
- CP_RULE_DETL
- CP_RULE_HT_LANG
- CP_RULE_HTML
- CP_USERCD_HDR
- OMBI_INTFC_AET
- TR_ATTACHMENTS
- UPG_CP_LONG_AET

APPENDIX G

Upgrading the Content Provider Registry

This appendix discusses:

- Understanding the Content Provider Registry Upgrade
- Copying Your Enterprise Portal Database
- Upgrading Enterprise Portal PeopleTools
- Updating Registry Permission Lists
- Creating the Portal Project
- Comparing the Portal Project
- Reviewing the Portal Project
- Copying the Portal Project
- Copying Portal Project to Production
- Deleting Obsolete Folders
- Updating Registry Folder Permissions

Understanding the Content Provider Registry Upgrade

You should perform this task if you use the Enterprise Portal 8.4 or higher running on PeopleTools 8.4x with the full navigation load access method. This means you do not use a single link to access your content provider database, but instead load some or all of the portal registry structures from the content provider database into your Enterprise Portal database. PeopleSoft refers to its application databases that contain the transaction content as Content Provider databases. Your Copy of Production database is your Content Provider database for this task.

When you upgrade a content provider database, the registry structures are updated, removed and added. These changes need to be copied to the Enterprise Portal database. This task will update the portal registry structures in your Enterprise Portal database to match what is in the Content Provider database. This is accomplished by the following:

- Upgrade the PeopleTools on a copy of the Enterprise Portal database.
This allows a project compare to run between the Enterprise Portal and the Content Provider database.
- Create a portal project in the Enterprise Portal database containing all of the existing Content Provider registry structures.
Copy the portal project (definition only) to the Content Provider database.

- Create a portal project in the Content Provider database containing all of the current Content Provider registry structures, then merge the project definition copied from the Enterprise Portal database into this project.

You will have a complete list of all registry structures for the Content Provider, including what is current and what should be deleted.

- Compare the complete list of registry structures in the Content Provider database to what exists in the Enterprise Portal, using project compare.

This marks the missing registry structures as delete and the updated or added registry structures as copy in the portal project definition.

- Copy the portal project from the Content Provider database to the Enterprise Portal database.

This deletes, updates, and adds registry structures to the Enterprise Portal database which syncs it up with what is current in the Content Provider database.

If you use Enterprise Portal 8 SP2, PeopleSoft recommends that you upgrade your Enterprise Portal to the latest available release.

If you do upgrade your Enterprise Portal database, you must be on PeopleTools 8.46 or higher.

Note. If you use Enterprise Portal 8.4 you *do not* need to upgrade to Enterprise Portal 8.8. You can still upgrade to PeopleTools 8.46.

Enterprise Portal 8.1x – Managing Information Architecture contains additional information on this topic.

See PeopleSoft Customer Connection (Support, Documentation, Documentation Updates, Enterprise, Portal Products, Enterprise Portal).

In this appendix, you load your new Portal Registry definitions from your Copy of Production database to a copy of your Enterprise Portal database.

Note. You must complete the tasks in the appendix for each of your separately installed Enterprise Portal databases that correspond to one of the four Portal Registry definitions: EMPLOYEE, CUSTOMER, SUPPLIER, and PARTNER. If your installed Enterprise Portal uses all the registries, then complete this task for each of the portal registries using the same copy of the single Enterprise Portal database.

In the first task of this appendix, you create a copy of your Enterprise Portal database. You use this copy for all subsequent steps for the initial and test Move to Production upgrade passes. For the final Move to Production, do not make a copy. Instead perform the steps on the production Enterprise Portal database.

This document uses the term “target Enterprise Portal database” to refer to the Enterprise Portal database used in the upgrade steps. Use the table below to determine the correct copy of your Enterprise Portal database for each pass:

Upgrade Pass	Target Enterprise Portal Database
Initial pass	Copy of the Enterprise Portal database
Test Move to Production	Copy of the Enterprise Portal database
Final Move to Production	Enterprise Portal production database

Task G-1: Copying Your Enterprise Portal Database

You initially upgrade the Content Provider registry on a copy of your Enterprise Portal database, then test the results of the upgrade. During your test Move to Production, you perform this task against another Copy of the Enterprise Portal.

Create a copy of your current Enterprise Portal production database now. Use this database as your target Enterprise Portal database.

Note. During your final Move to Production, you copy the registry definitions directly to your Enterprise Portal production database. Therefore, you do not need to execute this step during your final Move to Production.

Task G-2: Upgrading Enterprise Portal PeopleTools

During the initial upgrade pass, your Enterprise Portal database must run on the same PeopleTools release level as your Copy of Production database so that you can do the compare step. Because you do not need to run the compare step during your Move to Production passes, you can skip this task during Move to Production passes.

If the release level of PeopleTools on your target Enterprise Portal database is not the same as your Copy Production database release level, upgrade your PeopleTools now.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts, Release, Enterprise, PeopleTools).

Task G-3: Updating Registry Permission Lists

This section discusses:

- Understanding Registry Permission Lists Updates
- Updating Portal Registry
- Deleting the Database Cache

Understanding Registry Permission Lists Updates

This task applies only to the initial upgrade pass.

Earlier in this upgrade you copied portal registry data from the Demo database to your Copy of Production database. You must update this registry data to include your permission list changes. After updating the portal registry permission lists, delete the database cache.

This process takes between a few minutes and a few hours, depending on the volume of the portal data.

Note. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

Note. You must have a process scheduler started for your Copy of Production database.

Task G-3-1: Updating Portal Registry

Follow the steps below to update your portal registry permission lists.

To update the portal registry permission lists:

1. On your Copy of Production database, select PeopleTools, Portal, Portal Security Sync.
2. Select the Add a New Value tab.
3. Add a run control as follows:
 - a. Enter a value for the run control ID. The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER).
 - b. Click Add.
4. Enter a value for the portal name.

This value must match the portal registry name you used to replace the *XXXX* in the run control ID.
5. Click Save.
6. Click Run.
7. Set up the process scheduler information and click OK.
8. Click the Process Monitor link to view the progress of the process.

Task G-3-2: Deleting the Database Cache

Follow the steps below to delete the database cache.

To delete the database cache:

1. Delete the Copy of Production database application server cache.
2. Stop and restart the Copy of Production database web server service.

Task G-4: Creating the Portal Project

This section discusses:

- Understanding Portal Project Creation
- Creating the Target Enterprise Portal Project
- Cleaning the Target Enterprise Portal Project
- Deleting the Target Enterprise Portal Database Cache
- Copying the Target Enterprise Portal Project Definition
- Creating the Copy of Production Portal Project
- Cleaning the Copy of Production Portal Project
- Deleting the Copy of Production Database Cache

Understanding Portal Project Creation

This task applies only to the initial upgrade pass. In this task, you create and modify a project on your target Enterprise Portal database. Then you copy the project definition to the Copy of Production database, where you further modify the project.

Task G-4-1: Creating the Target Enterprise Portal Project

Follow the steps below to create the target Enterprise Portal project.

To create the target Enterprise Portal project:

1. Launch Application Designer and sign on to your target Enterprise Portal database.
2. Select Insert, Definitions into Project...
3. Select the following values:
 - a. In the Definition Type field, select *Portal Registry Structures*.
 - b. Leave the Portal Name field blank.
 - c. In the Owner ID field, select *All Owners*.
 - d. Do not select any values in the Related Definitions field.

Insert into Project

Definition Type:

Selection Criteria

Portal Name:

Type:

Owner ID:

Related Definitions

- Include Children
- Include HTML
- Include Templates

Insert

Close

New Search

Select All

Definitions matching selection criteria:

Portal Name	Type	Object Name

Insert into Project dialog box

4. Click Insert.
5. Click Select All, and then click Insert again.
6. Click Close.
7. From Application Designer, select File, Save Project As....

8. Enter the project name *PORTAL_PA84X_REGISTRY*.
9. Close Application Designer.

Task G-4-2: Cleaning the Target Enterprise Portal Project

In this step, you clean the target Enterprise Portal Project so that it contains only the existing Content Provider registry structure content references.

To clean the target Enterprise Portal project:

1. In your Enterprise Portal database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.

Warning! Do not follow the instructions on the Clean Portal Project page. Instead, follow the instructions below.

2. Add the run control ID *CLEAN_PORTAL_XXXXXXXX* where *XXXXXXXX* represents the portal definition name: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER* or *PARTNER* for example.
3. In the Project Name field, enter the project name *PORTAL_PA84X_REGISTRY*.
4. Enter a value in the Portal Name field; *EMPLOYEE* for example.
5. Enter a value in the Content Provider Name field; *CRM* for example.

Note. Before running the Clean Portal Project you must enter the node URI text for the message node that you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task G-4-3: Deleting the Target Enterprise Portal Database Cache

In this step, you delete the target Enterprise Portal database cache.

To delete the target Enterprise Portal database cache:

1. On your target Enterprise Portal database, launch Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the target Enterprise Portal database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task G-4-4: Copying the Target Enterprise Portal Project Definition

In this step, you copy the target Enterprise Portal project definition to your Copy of Production database.

To copy the target Enterprise Portal project definition:

1. Using PeopleSoft Data Mover, sign on to your target Enterprise Portal database.
2. Run the following Data Mover script:

```
PS_HOME\SCRIPTS\UVUPX10E.dms
```

3. Close Data Mover.
4. Using PeopleSoft Data Mover, sign on to the Copy of Production database.
5. Run the following Data Mover script:

```
PS_HOME\SCRIPTS\UVUPX10I.dms
```

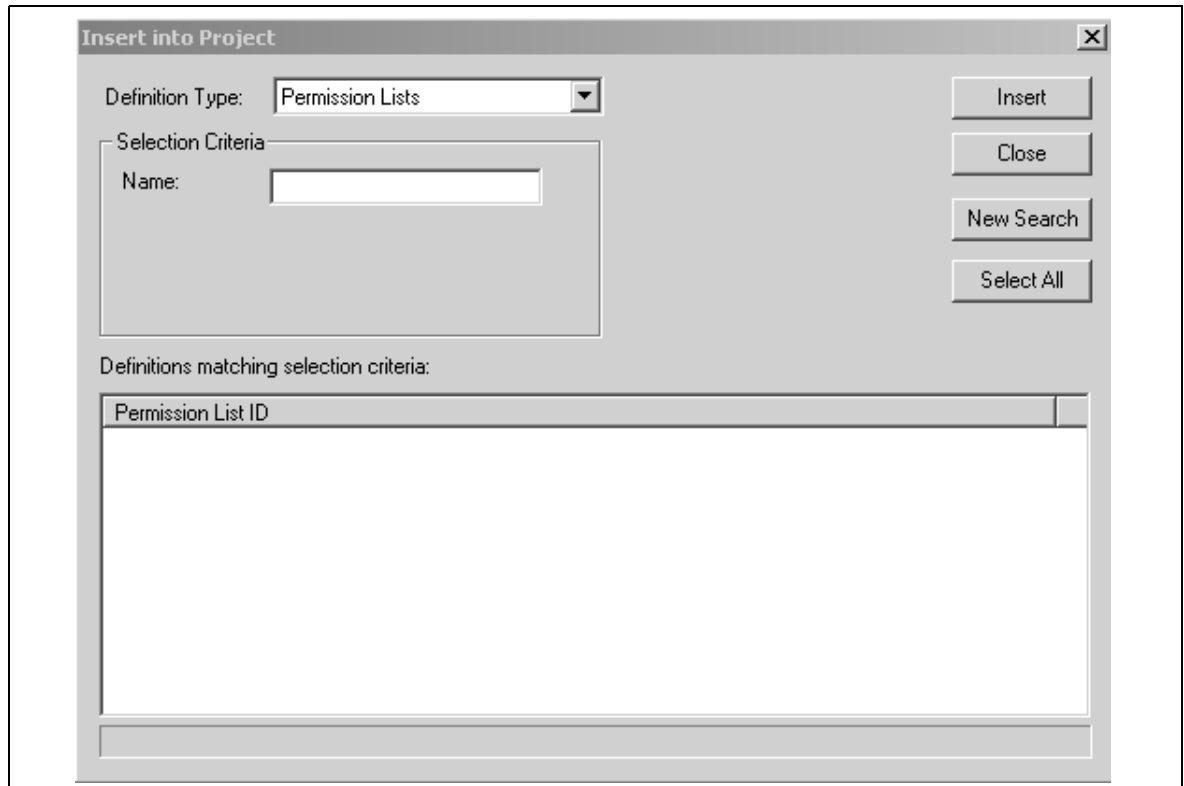
6. Close Data Mover.

Task G-4-5: Creating the Copy of Production Portal Project

Create a project containing all Portal Registry data on your Copy of Production database.

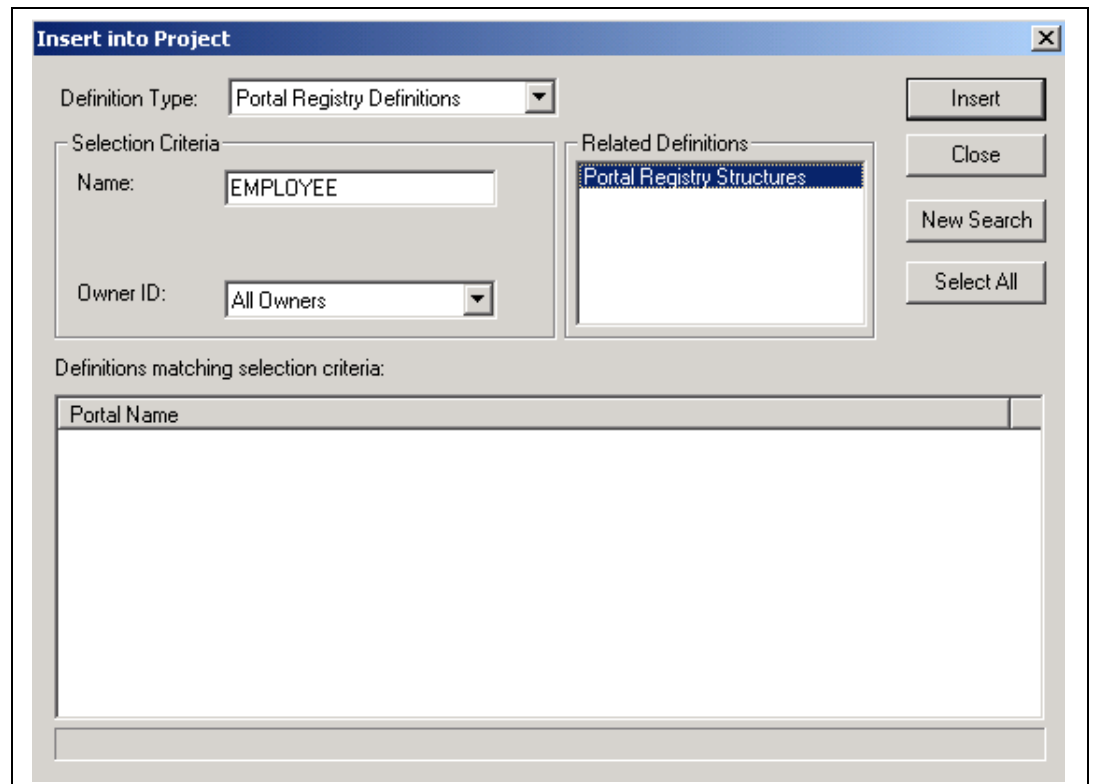
To create the Copy of Production Portal project:

1. Launch Application Designer and sign on to your Copy of Production database.
2. Select Insert, Definitions into Project....
3. In the Definition Type field, select *Permission Lists*.



Insert into Project dialog box: Definition Type Permission Lists

4. Click Insert.
5. Click Select All, and then click Insert again.
6. Select the following values:
 - a. In the Definition Type field, select *Portal Registry Definitions*.
 - b. In the Name field, enter the Enterprise Portal database's default portal name (EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER).
 - c. In the Owner ID field, select *All Owners*.
 - d. In the Related Definitions field, select *Portal Registry Structures*.



Insert into Project dialog box with Portal Registry Structures selected

7. Click Insert.
8. Click Select All, then click Insert again.
9. Click Close.
10. From Application Designer, select File, Save Project As....
11. Enter the appropriate new project name from the table below. This project is referred to as the Portal Project:

Portal Name	Project Name
EMPLOYEE	PORTAL_APP84X_EMPLOYEE
CUSTOMER	PORTAL_APP84X_CUSTOMER
PARTNER	PORTAL_APP84X_PARTNER
SUPPLIER	PORTAL_APP84X_SUPPLIER

12. Click OK.
13. From Application Designer, select File, Merge Projects...
14. Enter the project name *PORTAL_PA84X_REGISTRY*.
This merges the objects from the PORTAL_PA84XREGISTRY project into your newly created Portal Project.
15. Select File, Save Project to save the updated Portal Project.
16. Close Application Designer.

Task G-4-6: Cleaning the Copy of Production Portal Project

In this step, you clean the Copy of Production Portal project so that it contains only the Content Provider registry data.

Important! Before using the Copy of Production Portal project, you must run the Clean Portal Project on the Copy of Production database. Follow the directions on the Clean Portal Project Page.

To clean the Copy of Production Portal project:

1. In your Copy of Production database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.
2. Add the run control ID, *CLEAN_PORTAL_XXXXXXXX*, where *XXXXXXXX* represents the portal definition name; *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, or *PARTNER*, for example.
3. In the Project Name field, enter the Portal Project name that you created in the Creating the Copy of Production Portal Project step (*PORTAL_APP84X_[your portal name here]*).
4. Enter a value in the Portal Name field; *EMPLOYEE*, for example.
5. Enter a value in the Content Provider Name field; *CRM*, for example.

Important! Before running the Clean Portal Project, you must enter the Node URI text for the Message Node you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task G-4-7: Deleting the Copy of Production Database Cache

In this step, you delete the Copy of Production database cache.

To delete the Copy of Production database cache:

1. On your Copy of Production database, start Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the Copy of Production database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task G-5: Comparing the Portal Project

This task applies only to the initial upgrade pass.

In this step, you compare the Portal project that you created in the previous step and then review the compare results. This will enable you to adjust the portal project as necessary before copying it into the Enterprise Portal database.

To compare the Portal Project:

1. Launch Application Designer and sign on to your Copy of Production database.
2. Select Tools, Compare and Report....
3. Enter the Portal Project name that you specified in the Creating the Copy of Production Portal Project step (PORTAL_APP84X_[your portal name here]).
4. Enter the database name of your target Enterprise Portal database, and the user ID and password.
5. Click the Options button.
6. In the Compare Type field, select *Project*, and click OK.
7. Select all object types and click OK.
8. Close Application Designer.

Task G-6: Reviewing the Portal Project

This task applies only to the initial upgrade pass.

Review the Portal project (PORTAL_APP84X_[your portal name here]) on the Copy of Production database, looking for customizations that you have applied to your database. Object definitions that you changed have **Changed* or **Unchanged* in the Target column of the compare report. The * indicates that the change was not made by PeopleSoft. Review each of these objects carefully. If PeopleSoft delivered the object, the Source column of the report will read *Changed*. Note the changes that you made to the object. After you complete the upgrade, when you test the system, you can decide whether you still need the customization. You can reapply the customization at that time.

See Appendix: “Using the Comparison Process.”

Task G-7: Copying the Portal Project

This section discusses:

- Understanding Portal Project Copying
- Copying the Portal Project
- Deleting the Enterprise Portal Database Cache

Understanding Portal Project Copying

This task applies only to the initial upgrade pass.

In this step, you copy the project from your Copy of Production database to your target Enterprise Portal database.

Task G-7-1: Copying the Portal Project

Follow the steps below to copy the Portal Project to the Enterprise Portal database.

Important! Before exporting the Portal Project from the Content Provider database, you must successfully clean the Copy of Production Portal Project. If you proceed with this step without cleaning the project, you will overwrite critical Enterprise Portal data.

See [Creating the Portal Project](#), [Cleaning the Copy of Production Portal Project](#).

To copy the Portal Project:

1. Launch Application Designer and sign on to your Copy of Production database.
2. Select File, Open...
3. In the Definition field, select *Project* and click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To Database...
6. Enter the name of your target Enterprise Portal database, and the user ID and password.
7. Click Select All.
8. Click Copy.

This may take a few minutes.

9. Close Application Designer.

Note. You do not need to create or alter any records or views.

Task G-7-2: Deleting the Enterprise Portal Database Cache

In this step, you delete the Enterprise Portal database cache.

To delete the Enterprise Portal database cache:

1. Delete the target Enterprise Portal database application server cache.
2. Stop and restart the target Enterprise Portal database web server service.

Task G-8: Copying Portal Project to Production

This section discusses:

- [Understanding Portal Project to Production Copying](#)

- Copying the Portal Project to File
- Copying the Portal Project from File
- Deleting the Enterprise Portal Database Cache Again

Understanding Portal Project to Production Copying

You must perform this step during both your test and final Move to Production upgrade passes.

Task G-8-1: Copying the Portal Project to File

Follow the steps below to copy the Portal Project to file.

Note. If your Copy of Production and target Enterprise Portal databases run on the same PeopleTools release and database platform, you can copy the project directly to the target Enterprise Portal database from within the Copy of Production Application Designer and skip the rest of this step.

To copy the Portal Project to file:

1. Launch Application Designer and sign on to your Copy Production database.
2. Select File, Open....
3. In the Definition field, select *Project* and the click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To File....
6. Click the Browse button for the Export Directory.
7. Select a temporary directory and then click OK.
8. Click Select All.
9. Click Copy.
This may take a few minutes.
10. Close Application Designer.

Task G-8-2: Copying the Portal Project from File

In this step, you copy the Portal Project from file.

To copy the Portal Project from file:

1. Launch Application Designer and sign on to your target Enterprise Portal database.
2. Select Tools, Copy Project, From File....
3. Browse to the Copy of Production database server's temporary directory.
If you cannot access the Copy of Production database server's temporary directory, then copy the Portal Project folder and files from the temporary directory to the target Enterprise Portal database server's *PS_HOME\PROJECTS* directory, and browse to that directory.
4. Select the Portal Project name that you just copied to file in the previous step.
5. Click Open.

6. Click Select All.
7. Set the project language options as follows:
 - a. Click Options.
 - b. In the Copy Options tab, select *English*, and *COMMON*.
 - c. If your Enterprise Portal database is a multi-language database, then also select the languages that you have installed on your Enterprise Portal database.
 - d. Click OK.
8. Click Copy.
9. Select the Upgrade tab and view the Output window.

All objects should have copied successfully.
10. Close Application Designer.

Note. After the copy, you do not need to create or alter any records or views on the target Enterprise Portal database.

Task G-8-3: Deleting the Enterprise Portal Database Cache Again

In this step, you delete the Enterprise Portal database cache.

To delete the Enterprise Portal database cache:

1. Delete the target Enterprise Portal database's application server cache.
2. Stop and restart the target Enterprise Portal database web server service.

Task G-9: Deleting Obsolete Folders

This section discusses:

- Understanding Obsolete Folder Deletion
- Deleting Obsolete Folders on Enterprise Portal 8.4
- Deleting Obsolete Folders on Enterprise Portal 8.8

Understanding Obsolete Folder Deletion

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

In this step, you delete folders on your target Enterprise Portal database that the Portal Registry Structures no longer reference. The process that you run depends on your version of Enterprise Portal.

Task G-9-1: Deleting Obsolete Folders on Enterprise Portal 8.4

Follow this procedure to delete obsolete folders on Enterprise Portal 8.4.

To delete obsolete folders on Enterprise Portal 8.4:

1. Using PeopleSoft Data Mover, sign on to your target Enterprise Portal database.

2. Run the following Data Mover script, located in the Enterprise Portal PS_HOME\SCRIPTS directory:

PORTAL_REG_FOLDER_DEL.DMS
3. Close Data Mover.

Task G-9-2: Deleting Obsolete Folders on Enterprise Portal 8.8

Follow this procedure to delete obsolete folders on Enterprise Portal 8.8 or higher.

To delete obsolete folders on Enterprise Portal 8.8 or higher:

1. On your target Enterprise Portal database, navigate accordingly:
 - a. For Enterprise Portal 8.8: Portal Administration, Navigation, Run Folder Cleanup.
 - b. For Enterprise Portal 8.9 or higher: Portal Administration, Navigation, Delete Empty Folders.
2. Add a run control as follows:
 - a. Enter a value for the run control ID. The run control ID is *FOLDER_CLEAN_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
 - b. Click Add.
3. Enter a value in the Portal Name field.

This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task G-10: Updating Registry Folder Permissions

This section discusses:

- Understanding Registry Folder Permissions Updates
- Updating the Enterprise Portal Registry Folder Permissions
- Deleting the Enterprise Portal Cache

Understanding Registry Folder Permissions Updates

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, you must update the folder permissions to reflect the changes. After you update the folder permissions, you must delete the target Enterprise Portal database cache files to propagate the changes.

Task G-10-1: Updating the Enterprise Portal Registry Folder Permissions

Follow this procedure to update your Enterprise Portal registry folder permissions.

Note. This process will take between a few minutes to a few hours, depending on the volume of portal data. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

To update the Enterprise Portal folder permissions:

1. On your target Enterprise Portal database, select PeopleTools, Portal, Portal Security Sync.
2. Add a run control as follows:
 - a. Enter a value for the run control ID.
The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
 - b. Click Add.
3. Enter a value in the Portal Name field.
This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task G-10-2: Deleting the Enterprise Portal Cache

In this step delete the Enterprise Portal cache.

To delete the Enterprise Portal cache:

1. Delete the target Enterprise Portal database application server cache.
2. Stop and restart the target Enterprise Portal database web server service.

APPENDIX H

Using Data Conversion Utilities

This appendix discusses:

- Understanding Data Conversion Utilities
- Using the Upgrade Driver Program
- Using the Upgrade Drivers Page
- Reviewing the Data Conversion Report

Understanding Data Conversion Utilities

This appendix contains information regarding the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table.

Task H-1: Using the Upgrade Driver Program

In order to run all data conversions in the correct sequence, PeopleSoft has provided the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table. This program runs the Application Engine sections defined in the table PS_UPG_DATACONV. The PS_UPG_DATACONV table contains a list of all of the Application Engine sections that you need to run and in what sequence they should be run.

Task H-2: Using the Upgrade Drivers Page

This section discusses:

- Understanding Upgrade Drivers Page
- Accessing the Upgrade Drivers Page
- Adding New Upgrade Drivers Section Page
- Inactivating Upgrade Drivers Section

Understanding Upgrade Drivers Page

Before you run data conversion, you may need to change what the Upgrade Driver program runs. You can add, remove, or deactivate Application Engine sections through the Upgrade Drivers page.

You do not have an active portal on your Copy of Production during data conversion, so you need to view and update the Data Conversion Definitions on your Demo database and then copy the updated data to your Copy of Production database.

Task H-2-1: Accessing the Upgrade Drivers Page

To access the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Enter your upgrade path:
4. Click Search.

You are now on the Upgrade Drivers page. The following are descriptions for each section of the Upgrade Drivers page.

Upgrade Drivers									
Customize Find View All First 1-25 of 86 Last									
Upgrade Path	Program Name	Group #	Section	Sequence	Active Flag	Description	Comments		
CR80	UPG_CDM	1	CDMA010	10	Active	General Preparation	Comments	+	-
CR80	UPG_CDM	1	CDMX140	20	Active	Upgrade Basic Data Tables	Comments	+	-
CR80	UPG_CP	2	CPA00	100	Active	Upgrade Constraint	Comments	+	-
CR80	UPG_CP	2	CPA01	105	Active	Upgrade User Cd Detl	Comments	+	-

Upgrade Drivers page

- Upgrade Path. This field contains the upgrade path on which the section will be run.
- Program Name. This is the Application Engine program that contains the section.
- Group #. This is the group number. All sections with the same group number will be run during the same run of the UPG_DATACONV Application Engine program.
- Section. This is the section that will be called from the UPG_DATACONV Application Engine program.
- Sequence. This is the order in which the sections will be called during the run of UPG_DATACONV for the group number.
- Active Flag. This field determines whether the section will be run. If the value of this field is *Active*, the section will be run. If the value is *Inactive*, it will not be run. If you need to remove a section, change the value in this field to *Inactive*.
- Description.
- Comments.

Task H-2-2: Adding New Upgrade Drivers Section Page

Follow the instructions below to add a new section to the Upgrade Drivers page.

Note. To add a new section, the Application Engine program and section must exist on the Demo database.

To add a new section to the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.

2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Select Add a New Value.
4. Click Add.
5. Enter values for Upgrade Path and Program Name.
6. Enter a value for Group #.

Note. Each group number corresponds to a data conversion step in the Change Assistant template. If you select a group number that already exists in the PS_UPG_DATACONV table, your section will be executed when Change Assistant runs the data conversion step that corresponds to the group number you selected. Alternatively, if you assign a group number to your new section that does not already exist in PS_UPG_DATACONV, you must add a new step to your Change Assistant template. The new template step will have the same properties as the other data conversion steps, except for the group number specified in the step properties Parameters box.

7. Enter values for Section and Sequence.
The Description and Comments fields are optional.
8. Click Save.
9. When you have completed all changes, sign on to your Demo database using Data Mover and run the following script to export the updated data conversion data:

```
DLUPX03E.DMS
```

10. Sign on to your Copy of Production database using Data Mover and run the following script to load the updated data conversion data:

```
DLUPX03I.DMS
```

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release, Appendix: “Using a Change Assistant Template.”

Task H-2-3: Inactivating Upgrade Drivers Section

Follow the instructions below to deactivate a section on the Upgrade Drivers page. Once deactivated, the section will not run as part of data conversion.

To inactivate a section on the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Enter your upgrade path:
4. Click Search.
5. Find the row with the Program Name and Section you want to remove and change the value of the Active Flag field to *Inactive*.
6. Click Save.
7. When you have completed all changes, sign on to your Demo database using Data Mover and run the following script to export the updated data conversion data:

```
DLUPX03E.DMS
```

8. Sign on to your Copy of Production database using Data Mover and run the following script to load the updated data conversion data:

DLUPX03I.DMS

Task H-3: Reviewing the Data Conversion Report

Each of the upgrade data conversion sections contains comments that describe the processing performed by the section. PeopleSoft has delivered an SQR to list all of these comments by the group and sequence numbers that determine how they run. The name of this report is UDATAACNV.

To run UDATAACNV:

1. Using SQRW, run SQR UDATAACNV on your Copy of Production database.
2. When prompted for Upgrade Path, enter:
3. When prompted for Group Number, enter the two-digit group number to report on, or enter 0 to see the comments for all groups.

APPENDIX I

Using the Comparison Process

This appendix discusses:

- Understanding the Comparison Process
- Understanding Upgrade Compare Reports

Task I-1: Understanding the Comparison Process

This section discusses:

- Reviewing Source and Target Columns
- Reviewing the Action Column
- Reviewing the Upgrade Column
- Putting it All Together

During the upgrade you run a compare process and then review the resulting reports. The compare process first compares every property of an object definition on the source database to the properties of object definitions on the target database. PeopleSoft tracks object changes using the contents of the PSRELEASE table, and the value of two fields, LASTUPDDTTM and LASTUPDOPRID, used in the PeopleTools tables.

- The PSRELEASE table maintains the Comparison Release Level. This table contains rows of data for every release level at which the database has ever existed. The first column in this table, RELEASEDTTM, contains a date/time stamp identifying when each release level was “stamped.” The second column, RELEASELABEL, identifies the release level. The format of a release label is *M XX.XX.XX.YYY*, where *M* is the market code, *XX* is an integer from 0 to 99, and *YYY* is an integer from 0 to 999. A release label has two parts: the PeopleSoft release number (*M XX.XX.XX*) and the customer release number (*YYY*). Each time you customize your production database, you can stamp it with a new customer release level to help you track your changes over time. You should not change any portion of the PeopleSoft release number unless specifically instructed to do so.
- The LASTUPDDTTM field in our *PSobjectDEFN* tables—such as PSRECDEFN, PSPNLDEFN, and so on—stores a date/time stamp of when each object was last modified.
- The LASTUPDOPRID field stores the operator ID of the user who made the modification. If PeopleSoft made the modification, the proprietary ID *PPLSOFT* is used.

Note. Maintain Security prevents you from creating an operator named PPLSOFT.

If an object definition is defined differently in the source database than in the target, the compare process will check to see whether either object definition has changed since the comparison release. If the object’s LASTUPDDTTM value is greater than the RELEASEDTTM value for the comparison release level (stored in PSRELEASE), the object has changed. If the object’s LASTUPDDTTM

value is equal to or less than RELEASEDTM, the object has not changed (since the comparison release). Whether the compared object has changed or not, if it has *ever* been changed prior to the comparison release by someone other than PeopleSoft (LASTUPDOPRID $\neq$ 'PPLSOFT'), the object is identified as a customization.

After you run a compare report, you see the following information when you open an object type in the upgrade project from the Upgrade Tab of Application Designer. This is called the Application Designer Upgrade Definition window.

Task I-1-1: Reviewing Source and Target Columns

The status of each object is reported as it appears on the Source database and the Target database. The following table explains the various status types:

Status Type	Definition
Unknown	The object has not been compared. This is the default status for all objects inserted manually into a project and the permanent status of all non-comparison objects.
Absent	The object was found in the other database, but not in this one. When upgrading to a new PeopleSoft release, all of our new objects should have Absent status in the Target database and all of your new objects should have Absent status in the Source database.
Changed	The object has been compared, its LASTUPDOPRID value is <i>PPLSOFT</i> , and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In other words, PeopleSoft modified the object since the comparison release.
Unchanged	The object has been compared, its LASTUPDOPRID value is <i>PPLSOFT</i> , and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In other words, PeopleSoft last modified the object prior to the comparison release.
*Changed	The object has been compared, its LASTUPDOPRID value is not <i>PPLSOFT</i> , and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In this case, the customer has modified the object since the comparison release.

Status Type	Definition
*Unchanged	The object has been compared, its LASTUPDOPRID value is not <i>PPLSOFT</i> , and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In this case, the customer last modified the object prior to the comparison release.
Same	The object has been compared and is defined as the same in both databases. When an object in one database has this status, so will its counterpart in the other database. This status would never be seen when performing a database comparison because in that case, the project is only populated with objects defined differently. However, it can occur when performing a project comparison because in a project comparison, the project contents are static; the project is not repopulated based on the comparison results.

Task I-1-2: Reviewing the Action Column

The default actions for each object that you compared are reported in the Action column. The compare sets the action column based on what you need to do to make the Target database consistent with the Source. You should not change these actions. You can decide whether or not to accept each action by setting the Upgrade value. Action types include:

Action Type	Definition
Copy	Object will be added to the Target database
Copy Prop (Records and Fields only)	Object will be added to the Target database
Delete	Object will be deleted from the Target database.
None	No action will be taken on this object.

The PeopleSoft system assigns one of these action types to every object in a comparison project and in the compare reports. However, these actions are not necessarily carried out during the copy process. The value of the Upgrade column for each object makes that determination.

Task I-1-3: Reviewing the Upgrade Column

The Upgrade values for each object – Yes or NO – determine whether the object action will be carried out during the copy process. The upgrade orientation you assign during the compare process determines these settings. You can orient the Upgrade to keep PeopleSoft changes or to retain your changes in the target database. Whichever orientation you choose, you will still have the option to set each Upgrade value individually before launching the copy process.

You may find that after the compare process, your project contains objects that show up as Unchanged on the Demo database and Changed on the Copy of Production and the Upgrade column is not checked. What this status combination means is that the PeopleSoft object on your Copy of Production was changed more recently than on the Demo database. In these instances, PeopleSoft recommends that you accept the Demo database version of the object.

Task I-1-4: Putting it All Together

The following chart summarizes every possible Status, Action, and Upgrade value that could be set by the compare process to a single object:

Source Status	Target Status	Action	PeopleSoft Vanilla	Keep Customizations
(Any)	Absent	COPY	YES	YES
Absent	Changed or Unchanged	DELETE	YES	YES
	Changed* or Unchanged*	DELETE	NO	NO
Changed	Changed or Unchanged	COPY	YES	YES
	Changed* or Unchanged*	COPY	YES	NO
Unchanged	Changed	COPY	NO	NO
	Unchanged	COPY	YES	YES
	Changed* or Unchanged*	COPY	YES	NO
Changed*	Changed or Unchanged	COPY	NO	YES
	Changed* or Unchanged*	COPY	YES	YES
Unchanged*	Changed or Unchanged	COPY	NO	YES
	Changed*	COPY	NO	NO
	Unchanged*	COPY	YES	YES

Task I-2: Understanding Upgrade Compare Reports

This section discusses:

- Reviewing Report Columns
- Using Reports

When you run the compare process, it creates reports to help you understand what objects differ between the Source and Target databases, and how they differ. If you have documentation of your database modifications, you should retrieve it before reviewing these reports. This will help you understand how the Target objects

have changed and enable you to better compare the Target version of the object with the Source version. If you are upgrading to a new PeopleSoft release, you should also review the Release Notes for your product. These notes will identify and explain object changes in the New Release Demo database.

Upgrade reports can be a little intimidating at first glance, until you understand what data you are looking for and how best to use it. This section includes the following topics:

- Report columns
- Using reports

Task I-2-1: Reviewing Report Columns

For the most part, the columns in upgrade reports correspond with the columns you see in Application Designer's upgrade definition window. Moving from left to right, you see the Name of the object, then other key columns that vary by object type, then the Source and Target status, the Action value and Upgrade flag (*Yes* or *No*).

After these columns are three more that are not included in Application Designer. The first is Attribute. This tells you the type of difference that was found between the two objects. For example, record field Attribute values include *Use/Edit*, which identifies key or audit differences, and Default Field Name (*Def. Fldnm*), which identifies differences in a default value. Lastly, there is a Source column and a Target column. These wide columns display the actual differences between the object definitions. For example, on a *Use/Edit* attribute recfield difference, the Source column might contain *Xlat Table Edit* while the Target column is empty. This means the Source record field has a translate table edit while the Target record field does not.

If you are unsure of the meaning of any value in the last three report columns, open the PeopleTool that edits the particular object. The values in these columns correspond directly to dialog options in the tool.

Task I-2-2: Using Reports

PeopleSoft delivers several cross-reference reports that you can run to provide information about the inter-relationships between various objects. PeopleSoft delivers these reports in the form of SQRs (found in PS_HOME\SQR), Crystal Reports (found in PS_HOME\CRW\ENG), and Queries.

The cross-reference reports include:

Object Type(s)	Report Name	Report Description
Applications and Fields	XRFAPFL	Lists all application windows, such as General Tables, in alphabetical order, as well as the fields within each window. For each field, the report details the Field Name, Field Type, Length, and Format, as well as all the record and page definitions that contain the field (within the window).
Fields Referenced by PeopleCode Programs	XRFFLPC	Lists all PeopleCode programs in alphabetical order by associated record definition/field. The report includes type of field and lists all fields referenced in the PeopleCode program.

Object Type(s)	Report Name	Report Description
Fields and Panels	XRFFLPN	Lists all fields in alphabetical order. The report includes the names of all record and page definitions in which each field is used, as well as the Long Name of each field.
Records and Fields	XRFFLRC	Lists all fields in alphabetical order. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field, and includes the names of all record definitions that contain the field.
Field Listing	XRFIELDS	Lists all fields in alphabetical order. The report includes Field Type, Length, Format, Long Name and Short Name.
Menu Listing	XRFMENU	Lists application windows in alphabetical order. The report details all menus within each window, and all page definitions within each menu. It also includes the associated search record definition name and detail page definition name.
Panel Listing	XRFPANEL	Lists all page definitions in alphabetical order.
PeopleCode Programs and Field References	XRFPCL	Lists record definitions that contain fields with PeopleCode program attributes. The report includes the Field Name, as well as the associated record definitions and fields referenced in the PeopleCode program.
Panels with PeopleCode	XRFPNPC	Lists all pages that contain fields with PeopleCode attributes. For each page, the report includes the name of the record definition(s) that contain the field as well as the Field Name and Type.
Fields and Records	XRFRCL	Lists all fields in alphabetical order by associated record definition name. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field.

Object Type(s)	Report Name	Report Description
Records and Panels	XRFRCPN	Lists all record definitions in alphabetical order. The report includes the menu and page definitions associated with each record definition.
Window Listing	XRFWIN	Lists all application windows in alphabetical order.

In addition to using our standard cross-reference reports, you can also generate ad hoc reports to extract the exact combination of information you need. Or, you can create permanent custom reports for information you extract on a regular basis.

PeopleSoft recommends that you mark your upgrade reports using a color-coding system to help you quickly identify what you need to do to certain objects.

If you have several people reviewing sections of the reports, a good documentation policy is to have everyone on your review cycle initial and date the action defaults and overrides they select.

You may also find it easier to change some objects manually after the upgrade, rather than copying the new versions from the source.

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