

---

# Enterprise PeopleTools 8.49 Upgrade

---

**April 2007**

Enterprise PeopleTools 8.49  
Upgrade  
SKU utools849\_042507\_upt849  
Copyright © 2007, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

### **U.S. GOVERNMENT RIGHTS**

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee’s responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

### **Open Source Disclosure**

Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle’s PeopleSoft products and the following disclaimers are provided.

#### *Apache Software Foundation*

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright © 2000-2003. The Apache Software Foundation. All rights reserved. Licensed under the Apache License, Version 2.0 (the “License”); you may not use this file except in compliance with the License. You may obtain a copy of the License at <http://www.apache.org/licenses/LICENSE-2.0>.

Unless required by applicable law or agreed to in writing, software distributed under the License is distributed on an “AS IS” BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the License for the specific language governing permissions and limitations under the License.

### *OpenSSL*

Copyright © 1998-2005 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

### *Helma Project*

Copyright © 1999-2004 Helma Project. All rights reserved. THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

### *Sarissa*

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

### *ICU*

ICU License - ICU 1.8.1 and later COPYRIGHT AND PERMISSION NOTICE Copyright © 1995-2003 International Business Machines Corporation and others. All rights reserved.

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, provided that the above copyright notice(s) and this permission notice appear in all copies of the Software and that both the above copyright notice(s) and this permission notice appear in supporting documentation. THE SOFTWARE IS PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT OF THIRD PARTY RIGHTS. IN NO EVENT SHALL THE COPYRIGHT HOLDER OR HOLDERS INCLUDED IN THIS NOTICE BE LIABLE FOR ANY CLAIM, OR ANY SPECIAL INDIRECT OR CONSEQUENTIAL DAMAGES, OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN AN ACTION OF CONTRACT, NEGLIGENCE OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE. Except as contained in this notice, the name of a copyright holder shall not be used in advertising or otherwise to promote the sale, use or other dealings in this Software without prior written authorization of the copyright holder.

All trademarks and registered trademarks mentioned herein are the property of their respective owners.

*Sun's JAXB Implementation – JSDK 1.5 relaxngDatatype.jar 1.0 License*

Copyright © 2001, Thai Open Source Software Center Ltd, Sun Microsystems. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE REGENTS OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

*W3C IPR SOFTWARE NOTICE*

Copyright © 2000 World Wide Web Consortium, (Massachusetts Institute of Technology, Institut National de Recherche en Informatique et en Automatique, Keio University). All Rights Reserved.

Note: The original version of the W3C Software Copyright Notice and License could be found at <http://www.w3.org/Consortium/Legal/copyright-software-19980720>.

THIS SOFTWARE AND DOCUMENTATION IS PROVIDED "AS IS," AND COPYRIGHT HOLDERS MAKE NO REPRESENTATIONS OR WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE OR THAT THE USE OF THE SOFTWARE OR DOCUMENTATION WILL NOT INFRINGE ANY THIRD PARTY PATENTS, COPYRIGHTS, TRADEMARKS OR OTHER RIGHTS. COPYRIGHT HOLDERS WILL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF ANY USE OF THE SOFTWARE OR DOCUMENTATION.

# Contents

## Preface

- About This Documentation.....xi**
- Understanding This Preface.....xi
- Audience.....xi
- Organization.....xi
- Typographical Conventions and Visual Cues.....xii
- Related Information.....xiii

## Chapter 1

- Plan Your Upgrade.....1**
- Understanding the Planning Process.....1
- Organizing Your PeopleTools Upgrade.....1
- Reviewing Upgrade Step Properties.....3

## Chapter 2

- Prepare Your Database.....5**
- Understanding the Database Preparation.....5
- Updating Statistics.....5
- Running Initial Audit Reports.....6
  - Understanding Running Initial Audit Reports.....6
  - Run the Initial DDDAUDIT Report.....6
  - Run the Initial SYSAUDIT Report.....6
  - Run the Initial Alter Audit.....7
  - Review the Initial Audits.....11
- Reporting Row Count for Tables.....12
- Verifying Upgrade User.....13
- Preparing Your Database .....13
  - Understanding Database Preparation.....14
  - Verify Database Integrity.....14
  - Drop PeopleTools Tables.....14
  - Shrink Images.....15
  - Purge Message Queues.....16
  - Delete Pagelet Wizard Data.....16

### Chapter 3

<b>Install the Software</b> .....	<b>19</b>
Understanding the Installation Files.....	19
Installing the New Release .....	19
Understanding the New Release.....	20
Shut Down Servers.....	20
Save Customized Configuration Files.....	20
Backup PeopleTools Directories.....	21
Install Software from CD.....	21
Apply PeopleTools Patch.....	21
Set Up Application and Batch Servers.....	22
Set Up the Web Server.....	22
Set Up Pure Internet Architecture.....	23
Installing the Change Assistant.....	23
Creating a Change Assistant Job.....	24
Set Up Change Assistant.....	24
Set Configuration Manager Profile.....	25
Finalize Documentation.....	26

### Chapter 4

<b>Apply PeopleTools Changes</b> .....	<b>29</b>
Understanding PeopleTools Changes.....	30
Performing Script Modifications.....	30
Understanding Script Modifications.....	30
Run a DBTSFIX Report.....	30
Edit the DBTSFIX Output Scripts.....	31
Edit the GRANT Script.....	32
Edit the PSLANGUAGES Script.....	32
Edit the TLSUPGNONCOMP Script.....	32
Edit the PTxxxTLS Scripts.....	32
Edit the DDLDB2 Script.....	33
Edit the DDLDBX Script.....	33
Edit the DDLORA Script.....	34
Edit the DDLIFX Script.....	34
Edit the MSGTLSUPG Script.....	34
Edit the Integration Broker Script.....	34
Edit Multilingual Step Properties.....	35
Updating PeopleTools System Tables .....	36
Understanding Updating PeopleTools System Tables.....	36

Clean Up Message Data.....	36
Update System Catalog Views.....	37
Update PeopleTools System Tables.....	37
Grant Privileges to the CONNECT ID.....	38
Update PeopleTools Patch Information.....	38
Rerun Update Statistics for DB2 zOS.....	38
Rerun RUNSTATS Report for DB2 UNIX NT.....	39
Rerun Update Statistics for DB2 UNIX NT.....	39
Rerun Update Statistics for Informix.....	39
Rerun Update Statistics for Oracle.....	39
Turning Off Change Control.....	40
Loading Model Definition Data.....	40
Understanding Model Definition Data Load Process.....	40
Load Model Definitions for DB2 zOS.....	41
Load Model Definitions for DB2 UNIX NT.....	41
Load Model Definitions for Oracle.....	41
Load Model Definitions for Informix.....	41
Load Model Definitions for Microsoft.....	41
Load Model Definitions for Sybase.....	42
Loading Message Data.....	42
Reviewing PeopleTools Objects.....	42
Exporting and Copying Projects.....	44
Understanding Exporting and Copying Projects.....	44
Export and Copy PPLTLS84CUR Project.....	44
Export and Copy PPLTLS84CURML Project.....	45
Export and Copy PPLTLSML Project.....	46
Export and Copy PPLTLS84CURDEL Project.....	47
Export and Copy PATCH84X Project.....	47
Export and Copy PATCH84XML Project.....	48
Populating Tablespace Data.....	49
Populate Tablespace Data.....	49
Update Tablespace Names.....	49
Building Updated PeopleTools Project.....	50
Generate Updated PeopleTools Script.....	50
Edit the Updated PeopleTools Script.....	50
Run the Updated PeopleTools Script.....	51
Migrating Records to New Tablespaces.....	51
Understanding Migration of Records to New Tablespaces.....	51
Export and Copy the PT84TBLSPC Project.....	51
Build the Tablespace Alter Script.....	52

Edit the Tablespace Alter Script.....	52
Run the Tablespace Alter Script.....	53
Loading Base Data.....	53
Loading Language Data.....	53
Populate Languages.....	54
Load Language Data.....	54
Loading PeopleTools Data.....	54
Load NonComparable Objects.....	55
Load English Messages.....	55
Load English String Data.....	55
Load Stored Statements Data.....	55
Loading PeopleTools Definition Group.....	56
Converting PeopleTools Objects .....	56
Update REN Server Configuration.....	56
Populate MCF Data.....	57
Convert Portal Objects.....	57
Convert Query Prompt Headings.....	58
Encrypt Connector Passwords.....	58
Load Conversion Data.....	58
Report Conversion Details.....	59
Run Data Conversion.....	59
Complete PeopleTools Conversion.....	59
Creating All Views .....	60
Converting Integration Broker.....	60
Understanding Converting Integration Broker.....	60
Updating Integration Broker Defaults.....	60
Creating Integration Broker Objects.....	61
Saving Application Messaging Objects.....	61
Exporting Node Transactions.....	61
Preparing Integration Broker Deletes.....	62
Deleting Application Messaging Objects.....	62
Deleting Node Transactions.....	62
Creating All Triggers.....	62
Regenerating Sync IDs.....	63
Updating Object Version Numbers.....	63
Backing Up After PeopleTools Upgrade.....	63

<b>Chapter 5</b>	
<b>Complete Database Changes.....</b>	<b>65</b>
Understanding Database Changes.....	65
Updating Language Data.....	65
Understanding Updating Language Data.....	65
Run the TSRECPOP Script.....	65
Booting Servers.....	66
Setting Up Security.....	66
Understanding Security.....	66
Synchronize CREF Permissions.....	66
Reviewing PeopleTools Functionality.....	68
Running the Final Audit Reports.....	69
Run the Final DDDAUDIT Report.....	69
Run the Final SYSAUDIT Report.....	69
Create the FNLALTAUD Project.....	70
Run the Final Alter Audit.....	70
Review the Final Audits.....	70
Reviewing Change Control.....	71
<b>Chapter 6</b>	
<b>Appendices.....</b>	<b>73</b>
Understanding Appendices.....	73
<b>Appendix A</b>	
<b>Changing the User Interface.....</b>	<b>75</b>
Change the User Interface.....	75
Change the User Interface for Mobile.....	77
<b>Appendix B</b>	
<b>Performance Tips and Techniques.....</b>	<b>79</b>
Understanding Performance Tips and Techniques.....	79
Plan Your Upgrade for Performance.....	79
Improve Performance for Your Platform.....	79
Oracle.....	80
DB2.....	80
Consult the Global Support Center.....	80

Contents

**Index .....81**

# About This Documentation

This preface discusses:

- Understanding This Preface
- Audience
- Organization
- Typographical Conventions and Visual Cues
- Related Information

---

## Understanding This Preface

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 products and documentation, including PeopleSoft documentation conventions.

---

## 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 on-site 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.

Oracle recommends that you complete training before performing this upgrade.

See Oracle's PeopleSoft Customer Connection (Oracle University).

---

## Organization

This documentation is divided into chapters, each containing tasks that represent major milestones in the upgrade process. The chapter names are noted below:

- Plan Your Upgrade
- Prepare Your Database
- Install the Software
- Apply PeopleTools Changes
- Complete Database Changes

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

---

## Typographical Conventions and Visual Cues

To help you locate and understand information easily, Oracle uses a few simple conventions in describing your interaction with the upgrade process.

Convention	Description
Monospace	Indicates messages you may receive during the upgrade process. Monospace also indicates examples of SQL scripts or queries you run during the upgrade, for example: <code>select distinct DDLSPACENAME from PSRECDEFN.</code>
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or panel.
ALL CAPS	File or directory names are represented with all caps; for example, BAT, BIN, CBLBIN.
Menu, Panel	Commas (,) between menu and panel references indicate that the panel exists on the menu. For example, select Use, Process Definitions indicates that you can select the Process Definitions panel from the Use menu.
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press W.

Convention	Description
Cross-references	<p>See sections found at the end of a task or step refer you to additional documentation that will help you implement the task at hand. We highly recommend you reference this documentation.</p> <p>See Also sections refer you to additional documentation where there is more information regarding the subject. The title and section of the PeopleBook are separated by commas; the title of the PeopleBook is in <i>italics</i>.</p>
Topic list	Contains a list of all topics in the section.

---

**Note.** Text in this format indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by Important!, the note is crucial and includes information that you need to perform for the system to function properly.

---

## Related Information

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

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

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

- *Updates and Fixes Database.* The updates and fixes database (Patch Fix Search page) on Oracle's PeopleSoft Customer Connection website will have other information posted after shipment of this release that may not be included in these instructions. If you find any items categorized as required at upgrade or installation, you should detach any associated files and be ready to implement them at the appropriate time.

See PeopleSoft Customer Connection (Update + Fixes, Required at Install or Upgrade).

---

**Important!** Before upgrading, it is imperative that you check the updates and fixes database on PeopleSoft Customer Connection for updates to the upgrade. We continually post new updates there.

---



# CHAPTER 1

## Plan Your Upgrade

This chapter discusses:

- Understanding the Planning Process
- Organizing Your PeopleTools Upgrade
- Reviewing Upgrade Step Properties

---

### Understanding the Planning Process

In this chapter, you will plan your upgrade and review step properties for the upgrade process.

---

### Task 1-1: Organizing Your PeopleTools Upgrade

In this task, you gather documentation you will need for your PeopleSoft PeopleTools upgrade.

---

**Important!** You should apply this upgrade to your Demo database before applying it to other environments. This ensures that your Demo database is up-to-date with the current PeopleSoft PeopleTools release and provides an environment for additional testing.

---

Before you begin, review the following information to organize your Upgrade process:

- Review the PeopleSoft PeopleTools Release.  
Make sure to download the most recent version of the PeopleSoft PeopleTools document.  
See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts).
- Have your *PeopleTools Installation Guide* for your relational database management system (RDBMS) nearby.  
The Installation guide contains useful information that can help you with your upgrade process.  
See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes).
- Review the PeopleTools Release Notes.  
Read the PeopleTools Release Notes, prior to starting your upgrade, to determine what has changed in the system and to familiarize yourself with the new features. The Release Notes also indicate whether you need to upgrade any other portions of your system, such as your RDBMS software or batch files.

Make sure you have the most current version of the Release Notes. We strongly encourage you to read the entire document before beginning the upgrade process. It is important to be aware of any new support policies as well as any new features.

---

**Note.** If you skipped any PeopleSoft PeopleTools maintenance releases, download and read the Release Notes corresponding to the release(s) you skipped in addition to the Release Notes for this PeopleSoft PeopleTools release.

---

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

- Review Supported Platform information.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Implementation Guide, Supported Platforms).

Make sure your entire environment is still supported by Oracle. Check all categories that apply to your workstations, servers, third-party software, and language preferences. Our support policies evolve to incorporate the newest releases of database software and third-party software. In some cases, when we move to support the most recent version of a particular product, we drop support for a previous version. Always make sure you are on a supported environment prior to beginning an upgrade.

- Download Required for Upgrade Fixes.

Before you start applying this upgrade, check the list of required fixes. It is very important that you download all fixes in the “required for upgrade” view for PeopleSoft PeopleTools.

See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).

- Freeze Development.

Freeze development on your production database during this upgrade.

- Workstation Requirements.

For the upgrade workstation, the suggested minimum RAM is 256 MB.

---

**Important!** You will need to use a supported Windows client workstation for your new PeopleSoft PeopleTools release to upgrade.

---

- Performance Recommendations.

Plan for performance issues before beginning your upgrade.

See Appendix: “Performance Tips and Techniques.”

## Properties

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

## Task 1-2: Reviewing Upgrade Step Properties

When you open the upgrade template using PeopleSoft Change Assistant, you will see various properties for each step. Oracle includes several of those properties in this upgrade documentation. At the end of each upgrade step, you will see a description of the properties used during that step. The following graphic provides an example of the information you will see in the upgrade documentation:

### Properties

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

Example of properties information

There are three possible descriptions of Database Orientation: *Source*, *Target*, and *Copy of Current Demo*.

- *Source* indicates that the step runs on the Source database. This is not applicable for PeopleSoft PeopleTools-only upgrades.
- *Target* indicates that the step runs on the Target database. This is your upgrade database.
- *Copy of Current Demo* indicates that the step runs on the Copy of Current Demo database. This is not applicable for PeopleSoft PeopleTools-only upgrades.

There are three possible descriptions you will see for Initial or MTP: *Initial* (Upgrade), *MTP* (Move To Production), or *Both*.

- *Initial* indicates that this step runs in the Initial pass of the upgrade only. This is not applicable for PeopleSoft PeopleTools-only upgrades.
- *MTP* indicates that this step runs only in Move to Production upgrade passes. The step is not applicable to the Initial pass. This is not applicable for PeopleSoft PeopleTools-only upgrades.
- *Both* indicates that this step runs in both the Initial and Move to Production upgrade passes.

Two descriptions can be seen for Products: *All* and specific product names.

- *All* indicates that you run the step regardless of which products you are upgrading.
- Specific product name(s) indicates that you run the step only if you are upgrading the product(s) specified. You will specify which products you are upgrading when you set up your Change Assistant job configuration.

The two possibilities for Platform descriptions are *All* and specific platform names.

- *All* indicates that you run the step regardless of which platform your database uses.
- Specific platform names indicate that you run the step only if your database uses the specified platform. You specified which platform you are using when you set up your Change Assistant job configuration. The following are platform names that will appear:
  - DB2 z/OS
  - DB2 UNIX/NT
  - Informix
  - MS SQL Server

- Oracle
- Sybase

---

**Note.** For the sake of brevity, this documentation sometimes refers to DB2 UDB for UNIX, Linux, and Windows as DB2 UNIX/NT. In addition, DB2 UDB for z/OS is abbreviated as DB2 z/OS.

---

There are two possible descriptions you will see for Languages: *All* and specific language names.

- *All* indicates that you will run this step regardless of which language your database uses.
- Specific language names indicate that you will run this step only if your database uses the language specified. You specified which languages are installed on your database when you set up your Change Assistant job configuration.

For more information about properties, refer to the Enterprise PeopleTools PeopleBook documentation.

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

### Properties

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

# CHAPTER 2

## Prepare Your Database

This chapter discusses:

- Understanding the Database Preparation
- Updating Statistics
- Running Initial Audit Reports
- Reporting Row Count for Tables
- Verifying Upgrade User
- Preparing Your Database

---

### Understanding the Database Preparation

In this chapter, you start preparations for the technical portion of the upgrade. Preparation tasks include updating statistics, cleaning audits, and running and reviewing pre-upgrade reports. These tasks do not use the new installed PeopleSoft version. Use your current codeline and PeopleSoft PeopleTools version to perform these tasks.

---

### Task 2-1: 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: “Performance Tips and Techniques.”

#### Properties

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

## Task 2-2: Running Initial Audit Reports

This section discusses:

- Understanding Running Initial Audit Reports
- Run the Initial DDDAUDIT Report
- Run the Initial SYSAUDIT Report
- 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 2-2-1: Run the Initial DDDAUDIT Report

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

Using SQR from your current (old) PeopleSoft release, run the DDDAUDIT against the Target database to ensure that you are starting with a clean database. You can find this SQR script in the PS\_HOME\SQR directory. For instructions on how to run DDDAUDIT, refer to the reference below.

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 2-2-2: Run the Initial SYSAUDIT Report

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

Using SQR from your current (old) PeopleSoft release, run SYSAUDIT against the Target database to ensure that you are starting with a clean database. You can find this SQR script in the PS\_HOME\SQR directory. For instructions on how to run SYSAUDIT, refer to the reference below.

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

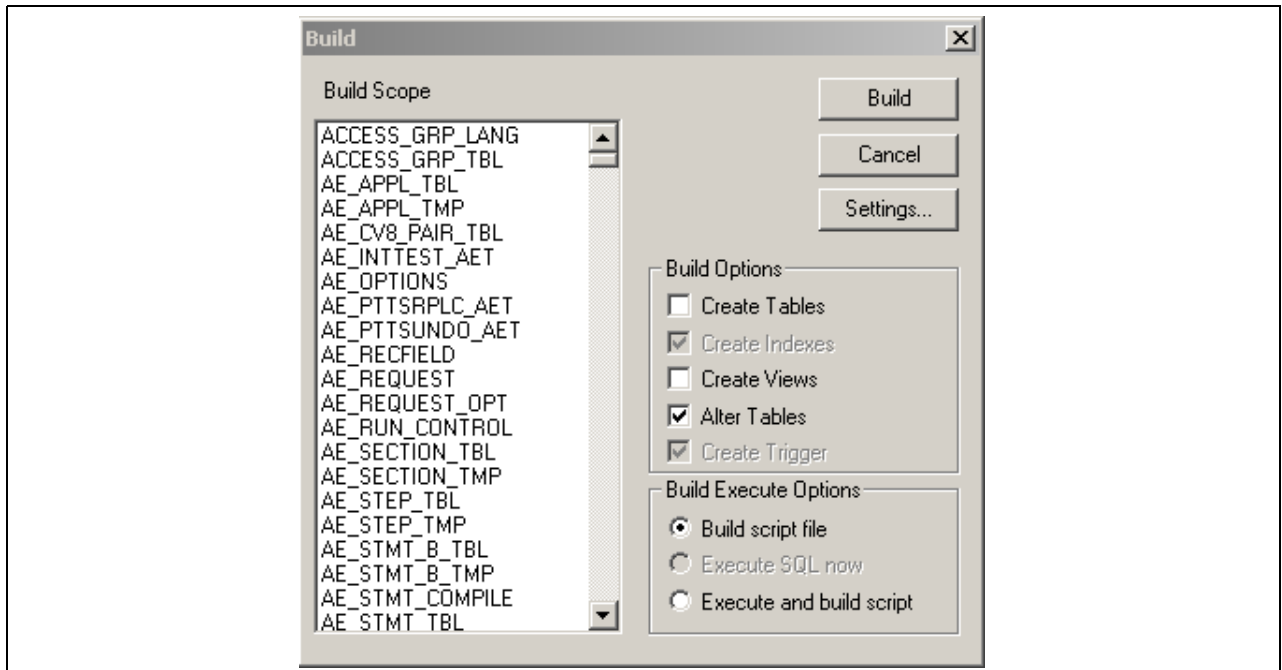
### Task 2-2-3: Run the Initial Alter Audit

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

To run Alter Audit:

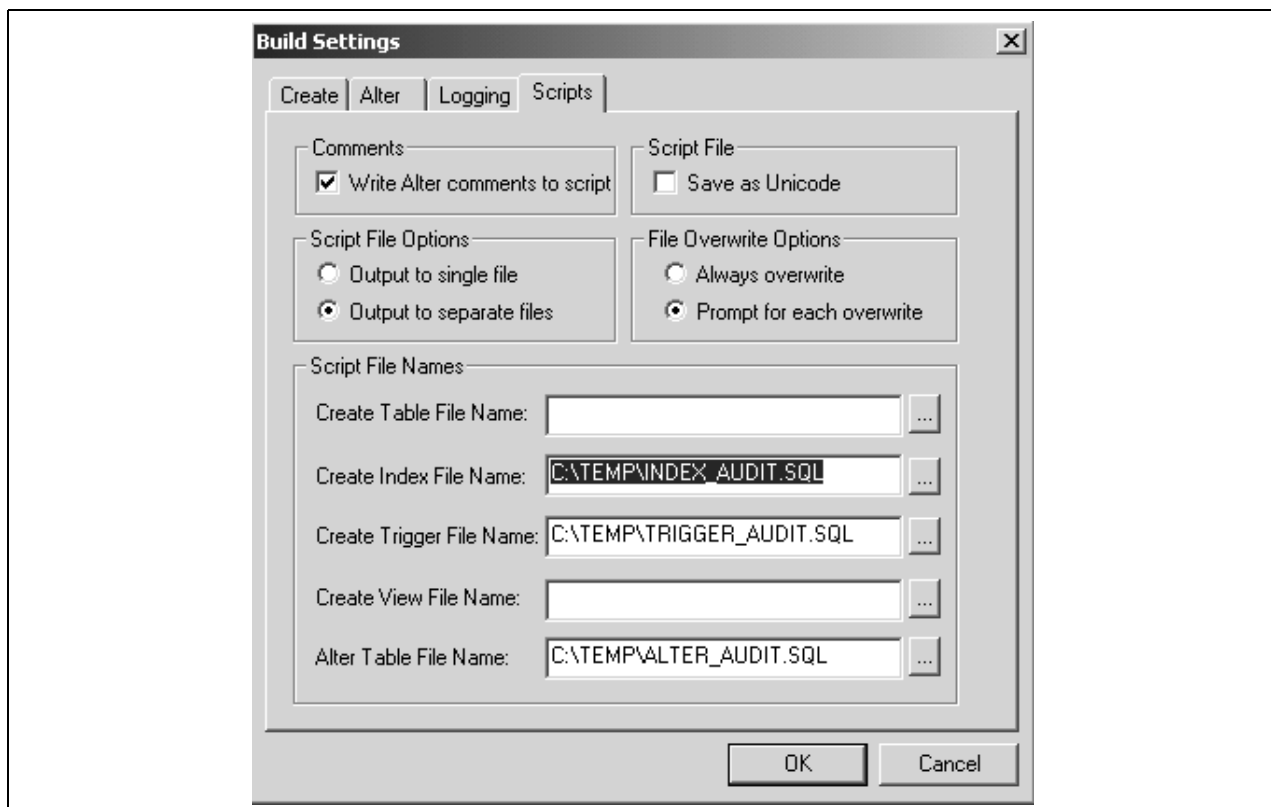
1. Launch PeopleSoft PeopleTools and sign in to the Target database.
2. From Application Designer, select File, New...
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project...
5. Select Records from the Definition Type drop-down list box.
6. Select Table from the Type drop-down list box.
7. Click Insert, and then click Select All.
8. Click Insert, and then click Close.
9. Select File, Save All.
10. Enter a project name of your choice.
11. Click OK.
12. Select Build, Project...

The Build dialog box appears:



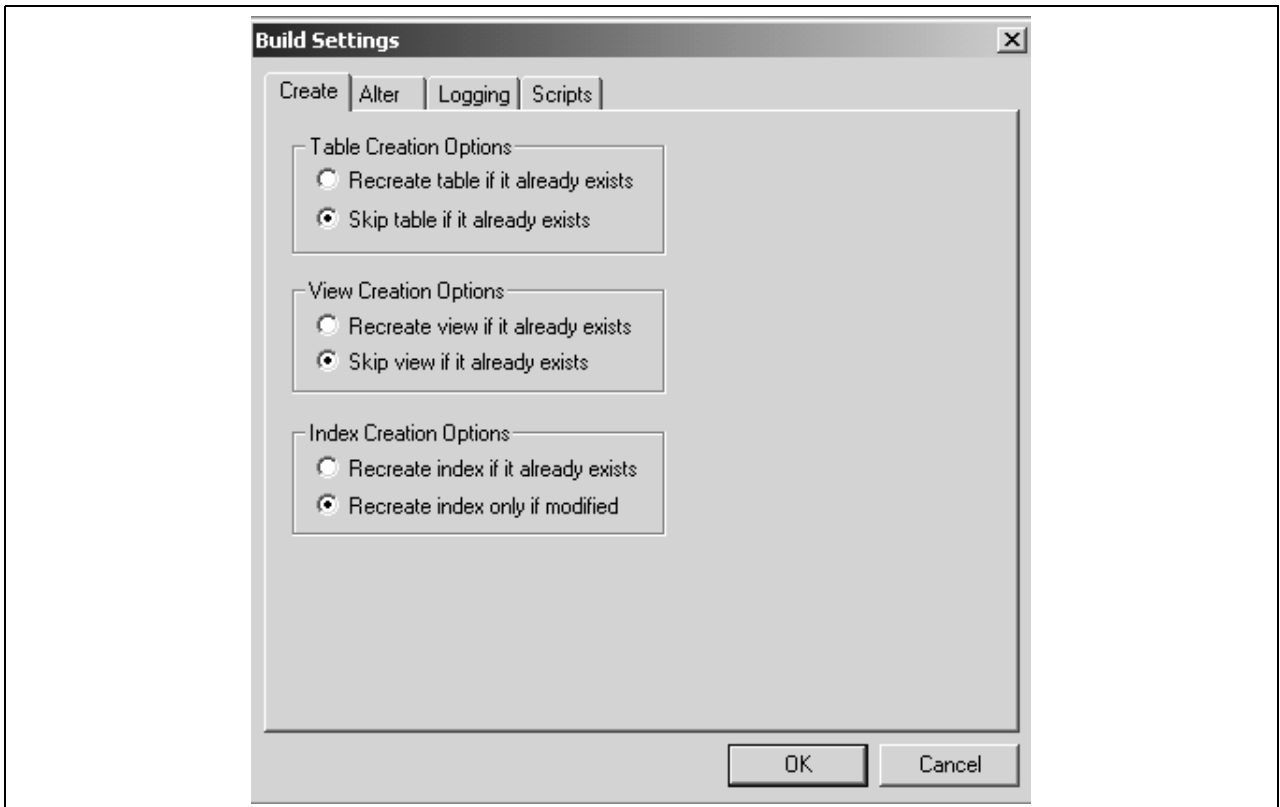
Build dialog box

13. Under Build Options, select Alter Tables.  
Create Indexes and Create Trigger are automatically selected.
14. Under Build Execute Options, select Build script file.
15. Click Settings...  
The Build Settings dialog box appears.
16. Select the Scripts tab.



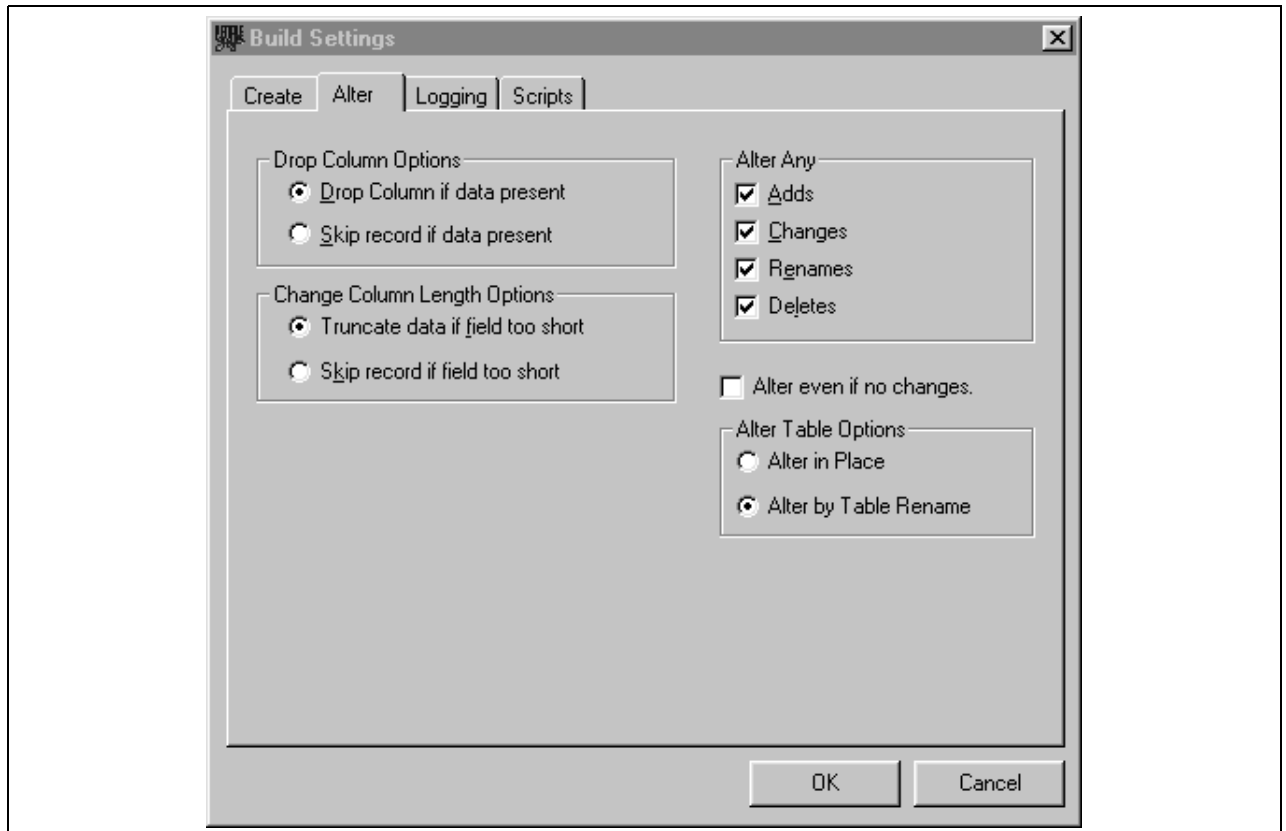
Build Settings dialog box: Scripts tab

17. Under Comments, select Write Alter comments to script.
18. Under Script File Options, select Output to separate files and enter script names.
19. Select the Create tab.



Build Settings dialog box: Create tab

20. Under Index Creation Options, select Recreate index only if modified.
21. Select the Alter tab.



Build Settings dialog box: Alter tab

22. Ensure that the following fields are set correctly:

- Under the Alter Any option section, the Adds, Changes, Renames, and Deletes check boxes should be selected.
- Drop Column Options should be set to Drop Column if data present.
- Change Column Length Options should be set to Truncate data if field too short.

23. Click OK.

The Build dialog box reappears.

24. Click Build on the Build Dialog.

25. Click Close when complete.

## Properties

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

## Task 2-2-4: Review the Initial Audits

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

Review the output from the SYSAUDIT 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. Oracle takes this precaution in case you have customized information that you want to preserve. When you review your DDDAUDIT listing, these tables are listed as a discrepancy between the PeopleSoft application and the database.

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

The Alter Audit produces your named scripts from the previous step. These scripts contain SQL that corrects any discrepancies between your PeopleSoft PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies.

---

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

---



---

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

---

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

## Properties

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

---

## Task 2-3: 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.

Using your current (old) PeopleSoft release, run the Application Engine program UPGCOUNT from the command line on your client workstation against the Target database. The command line command is as follows:

```
\PS_HOME\bin\client\winx86\psae -CT dbtype -CS server -CD dbname -CO oprid -CP =>
oprpswd -R UPG -AI UPGCOUNT
```

---

**Note.** The -CS option applies to Informix and Sybase installations only.

---

## Properties

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

---

## Task 2-4: 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 PeopleSoft PeopleTools. If you skip this step, or if your user has insufficient PeopleSoft administrator privileges, you will not be able to complete your upgrade. You cannot complete this step later in the upgrade process. Perform the following steps to grant administrator privileges now.

---

To grant your upgrade user PeopleSoft administrator privileges:

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

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 2-5: Preparing Your Database

This section discusses:

- Understanding Database Preparation
- Verify Database Integrity
- Drop PeopleTools Tables

- Shrink Images
- Purge Message Queues
- Delete Pagelet Wizard Data

## Understanding Database Preparation

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

### Task 2-5-1: Verify Database Integrity

Use the command specific to your database platform environment to perform a database consistency check on your Target database to ensure that it is clean and to minimize any potential upgrade errors due to possible database corruption.

Platform	Command
Microsoft SQL Server	DBCC CHECKDB
Sybase	DBCC CHECKDB

### Properties

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

### Task 2-5-2: Drop PeopleTools Tables

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

Drop the following tables:

- PS\_PSMCFQUEUESLANG

---

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

---

- PSOPTSTATUS

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

## Properties

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

### Task 2-5-3: Shrink Images

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

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

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

---

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

---

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

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

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

To manually save images greater than 32 KB:

1. In 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 2-5-4: Purge Message Queues

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

Run the following Data Mover script, found in the %PS\_HOME\SCRIPTS directory of your old release codeline, on your Target database to purge your message queues:

```
APPMSGPURGEALL.DMS
```

### Properties

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

### Task 2-5-5: Delete Pagelet Wizard Data

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

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

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

Run the script *only* if both of the following conditions are met:

- Your current production application release database is *already* on PeopleSoft PeopleTools 8.46 or greater.
- The PS\_EOPPB\_LINKPATHS table exists on the Target database.

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

```
PTPPB_EOPPB.DMS
```

### Properties

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



## CHAPTER 3

# Install the Software

This chapter discusses:

- Understanding the Installation Files
- Installing the New Release
- Installing the Change Assistant
- Creating a Change Assistant Job

---

## Understanding the Installation Files

In this task, you will install the software required for this upgrade. You will download the *PeopleTools 8.4x Installation Guide* for your database platform from Oracle's PeopleSoft Customer Connection website. At this time, we recommend that you download and apply all files and objects from the Upgrade page on the PeopleSoft Customer Connection website. These fixes will bring you up-to-date with any changes made to the upgrade process.

You will also install the PeopleSoft Change Assistant on any workstation you plan to use during the remainder of the upgrade. You must install the PeopleSoft Change Assistant at this time. The written documentation will not make sense from this point forward without the use of the PeopleSoft Change Assistant. To properly use the PeopleSoft Change Assistant, you also need to download the appropriate template for your upgrade from the PeopleSoft Customer Connection website.

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

---

## Task 3-1: Installing the New Release

This section discusses:

- Understanding the New Release
- Shut Down Servers
- Save Customized Configuration Files
- Backup PeopleTools Directories
- Install Software from CD
- Apply PeopleTools Patch
- Set Up Application and Batch Servers

- Set Up the Web Server
- Set Up Pure Internet Architecture

## Understanding the New Release

Download the Enterprise PeopleTools Installation Guide, for your platform on your new release.

See Oracle's PeopleSoft Customer Connection (Implement Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes).

Using the PeopleSoft Customer Connection website is an essential part of a successful PeopleSoft application installation. The updates and fixes database (Patch Fix Search page) on the PeopleSoft Customer Connection website contains an up-to-date record of any modifications and fixes you will need to be aware of for the upgrade. If you find any items categorized as required at upgrade or installation, you should detach any associated files and be ready to implement them at the appropriate time.

See PeopleSoft Customer Connection (Update + Fixes, Required at Install or Upgrade).

### Task 3-1-1: Shut Down Servers

Shut down any application servers, web servers, and process scheduler servers. Make sure that there are no lingering threads from any application server domains. Such threads can interfere with successfully installing new application server files. If there are any threads remaining after you shutdown the domains, you need to manually remove them.

---

**Note.** AIX: Run the slibclean utility as the root user to remove unused shared libraries from memory.

---

#### Properties

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

### Task 3-1-2: Save Customized Configuration Files

If you have any customized configuration files (such as psappsrv.cfg, psconfig.sh, pspt, psctl.mak, psrun.mak, \$ORACLE\_HOME/opmn/conf/opmn.xml, and so on), copy them to another directory so that they are not overwritten during the upgrade process. This enables you to preserve any tuned variables.

Configuration files are typically overwritten when you install the new release using the PeopleSoft Installer.

---

**Note.** You may want to print the old configuration files, so that you can easily refer to them in subsequent steps.

---

#### Properties

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

### Task 3-1-3: Backup PeopleTools Directories

Back up your existing PeopleTools directories. Clone your existing directories and place them in a separate area on your application server, web server, batch server, and file server.

#### Properties

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

### Task 3-1-4: Install Software from CD

This step must be performed for all your PeopleSoft servers, which include the application server, batch server, web server, and file server. Install the PeopleTools software to all your PeopleSoft servers from the PeopleTools CD-ROM. Run the PeopleSoft Installer and install the software to the same PS\_HOME directory where you installed the previous PeopleTools 8.4x software, where x represents the PeopleTools release level from which you are upgrading.

---

**Note.** If you customized your existing PeopleTools files, the customizations are overwritten with the new PeopleTools files when you install the software.

---

Windows-based Servers only: If you are installing PeopleTools in languages other than English, select *PeopleTools Language Pack* and/or *PeopleTools Language Pack Development Kit* from the CD-ROM Installation.

---

**Note.** DB2 z/OS: To transfer files to the Batch Server, run Server Transfer (PSTRANS.EXE). This will transfer the files from the file server to the batch server then recompile and relink COBOL.

---

See the Enterprise PeopleTools installation guide, “Using the PeopleSoft Installer,” for your database platform on your new release.

#### Properties

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

### Task 3-1-5: Apply PeopleTools Patch

As part of the PeopleSoft PeopleTools upgrade, you may incorporate the application of a PeopleSoft PeopleTools patch into the upgrade process. Apply the patch for the new PeopleSoft PeopleTools release you are installing; do not apply a patch for a different PeopleSoft PeopleTools release. If you are applying a PeopleSoft PeopleTools patch, you need to apply the changes to all your servers at this time.

The patches are located on the PeopleSoft Customer Connection website (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Patches and Fixes). Review the documentation delivered with the patch to fully understand the fixes.

Run \PA84XXX\setup.XXX, provide the same license code that was used to install the PeopleTools 8.4X CD, and install the patched components to all of the appropriate PeopleSoft servers (application server, batch server, database server, file server, web server) on top of your existing high level PeopleSoft directory.

---

**Note.** If the patch includes database changes, you will apply the database changes later during this upgrade.

---



---

**Note.** DB2 z/OS: To transfer files to the batch server, run Server Transfer (PSTRANS.EXE). This will transfer the files from the file server to the batch server then recompile and relink COBOL.

---

See the Enterprise PeopleTools installation guide, “Using the PeopleSoft Installer,” for your database platform on your new release.

### Properties

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

## Task 3-1-6: Set Up Application and Batch Servers

Re-create your application server and batch server domains. A PeopleSoft PeopleTools-only upgrade may contain revised application server and batch server templates with new parameters. You will not be able to benefit from the new parameters if you do not re-create the domain(s). Use the appropriate PSADMIN template (small, medium, or large), and specify the values contained in your previous configuration files so that you can retain your tuned variables. If you have not tuned the domain, keep the defaults. Do not boot your application and batch servers at this time.

---

**Note.** Oracle platforms do not need to regenerate the shared libraries with PeopleSoft PeopleTools-only upgrades.

---



---

**Note.** If you are upgrading PeopleSoft PeopleTools and you have a PeopleSoft application COBOL modules, you must recompile all COBOL. Ensure that the following COBOL runtime files in your client and server bin directories match those of your NetExpress installation: cblints.dll, cblrtss.dll, cblvios.dll, and COB32API.DLL.

---

### Properties

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

## Task 3-1-7: Set Up the Web Server

Be sure to uninstall any previous Oracle’s PeopleSoft Pure Internet Architecture installations on the web server. After you uninstall any previous PeopleSoft Pure Internet Architecture installations (and *before* you reinstall), reboot the server. This will ensure that any previous files are removed from the system.

Depending on your web server platform, complete the following steps to uninstall previous PeopleSoft Pure Internet Architecture sites for either UNIX or Windows:

- For WebLogic, shut down WebLogic and follow the uninstall instructions in the PeopleSoft Enterprise PeopleTools Installation Guide for your database platform. Alternatively, delete the contents of one of the following directories:
  - For PeopleSoft PeopleTools 8.43.x or earlier: `weblogic_home\wlserver6.1\config\peoplesoft_domain\*`
  - For PeopleSoft PeopleTools 8.44.x or later: `PS_HOME\webserv\peoplesoft_domain\*`
- For WebSphere, shut down WebSphere and follow the uninstall instructions in the PeopleSoft Enterprise PeopleTools Installation Guide for your database platform.
- For Oracle Application Server (OAS), shut down OAS and follow the uninstall instructions for the OC4J component and OAS in the PeopleSoft Enterprise PeopleTools Installation Guide for your database platform.

See PeopleSoft Enterprise PeopleTools Installation Guide, for your platform.

### Properties

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

## Task 3-1-8: Set Up Pure Internet Architecture

In this task you set up PeopleSoft Pure Internet Architecture.

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

---

**Note.** Make sure you stop the server before performing the PeopleSoft Pure Internet Architecture install or uninstall and, to be safe, reboot the machine between the uninstall and the reinstall.

---

If you are using OAS and have customized your OAS installation, run the following commands after setting up PeopleSoft Pure Internet Architecture:

```
$ORACLE_HOME/opmn/bin/opmnctl reload
$ORACLE_HOME/dcm/bin/dcmctl updateconfig
```

### Properties

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

---

## Task 3-2: Installing the Change Assistant

Now that PeopleSoft PeopleTools is installed, you need to install the PeopleSoft Change Assistant for your new release on any workstation that you will use to perform portions of the upgrade.

Follow the instructions in the *Enterprise PeopleTools 848 Installation Guide for your database platform: Installing PeopleSoft Change Assistant* to install PeopleSoft Change Assistant. Review the *Enterprise PeopleTools PeopleBook for your release: Software Updates* for information on how to navigate through the Change Assistant, how to set up your upgrade templates, and how to run your upgrade process.

Once Change Assistant has been installed, open it by selecting Start, Programs, PeopleSoft 8.4, Change Assistant.

---

**Note.** If an older version of Change Assistant is already installed on the workstation, remove the older version. Then install the new Change Assistant.

---

## Properties

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

---

## Task 3-3: Creating a Change Assistant Job

This section discusses:

- Set Up Change Assistant
- Set Configuration Manager Profile
- Finalize Documentation

On the PeopleSoft Customer Connection upgrade documentation page for the new release, you will find the PeopleSoft upgrade templates. Using PeopleSoft Change Assistant, you can open the appropriate template and create a job for your initial upgrade pass.

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

### Task 3-3-1: Set Up Change Assistant

To run an upgrade using Change Assistant, you need to configure Change Assistant and create an upgrade job.

To set up Change Assistant:

1. Launch Change Assistant.
2. Configure the Change Assistant options:
  - a. Select Tools, Options.
  - b. On the Change Assistant tab, select the Perform PeopleTools Only Upgrade mode.
  - c. Fill in the rest of the information on this tab and the other active tabs.
  - d. Click OK.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates, “Installing and Configuring Change Assistant,” for your new release.

3. Import the upgrade template into Change Assistant:

- a. Select File, Import Template.
- b. Enter or browse to the directory containing the upgrade template and select PeopleTools\_Only\_Upgrade.xml.
- c. Click Import.
4. Define the upgrade environment information for the upgrade:
  - a. Select File, New Environment.
  - b. Name the environment for this upgrade pass.
  - c. Click OK.
  - d. Then, fill in all the required information on each screen.

See PeopleSoft Customer Connection, (Updates + Fixes, Documentation Updates, Enterprise, PeopleTools, Change Assistant, Using Change Assistant for Application Upgrades).

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

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

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates, “Configuring Change Assistant for Upgrades,” for your new release.

6. Set the documentation directory in Change Assistant:
  - a. Left click on the upgrade job title and select Set Documentation Directory.
  - b. Enter or browse to the directory containing the HTML documentation for this upgrade and click OK.

Change Assistant displays the HTML upgrade documentation in the documentation pane.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates, “Configuring Change Assistant for Upgrades,” for your new release.

## Properties

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

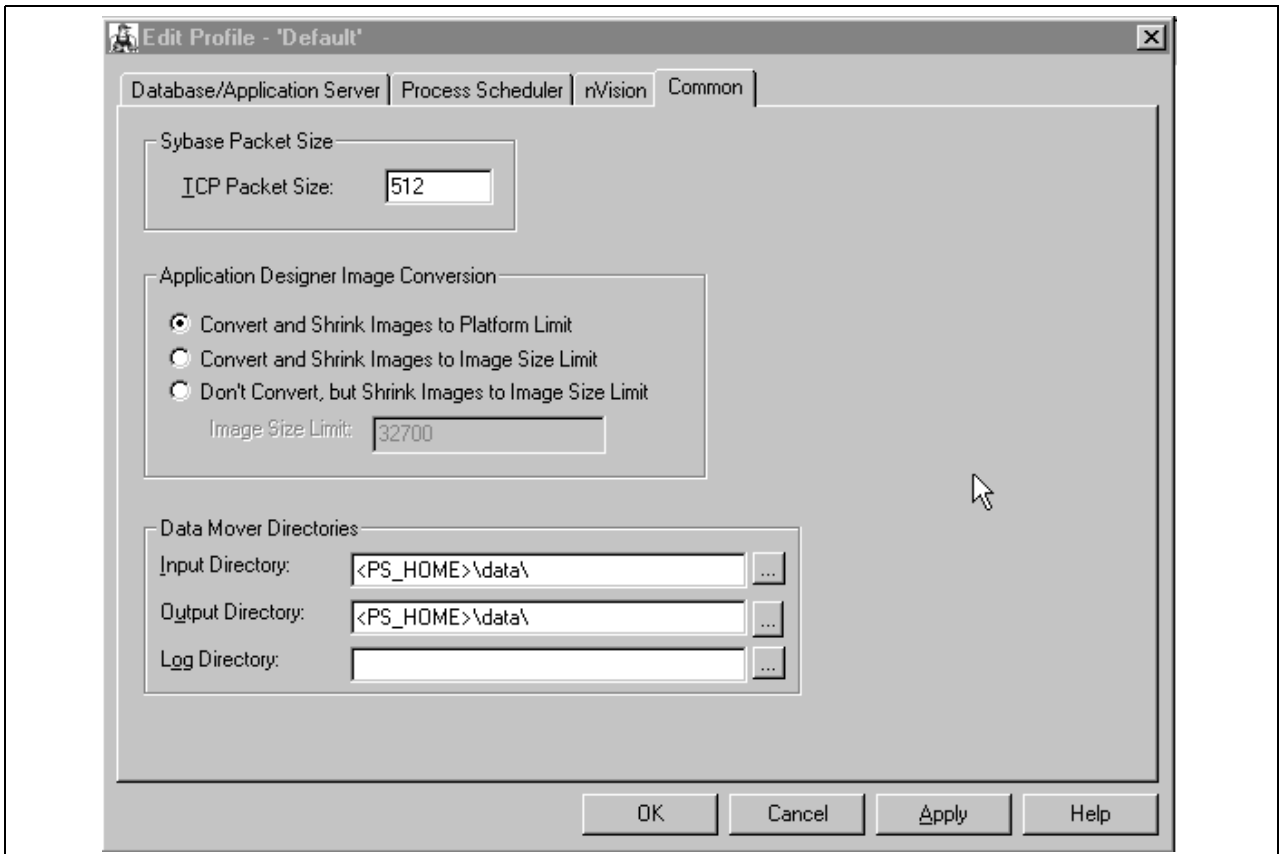
## Task 3-3-2: Set Configuration Manager Profile

When you created your Change Assistant job, some of the workstation Configuration Manager profiles were edited by Change Assistant. Now you need to verify the other settings that are used during the upgrade. These are settings on the workstation and you will need to do this for each workstation you may use during the upgrade.

To set the profile:

1. Open Configuration Manager.
2. On the Profile tab, select the Default Profile, and click on Edit.
3. In the Edit Profile - 'Default' dialog box, select the Common tab.

On the Profile tab, select the Default profile, click on Edit and go to the Common tab.



Edit Profile - Default: Common tab

4. Verify that the Input Directory is *PS\_HOME\data\*, substituting *PS\_HOME* with your directory. The Output Directory must be the same.
5. The Log Directory is set by Change Assistant and should be left as is.
6. Select the Process Scheduler tab and verify your SQR settings. Change Assistant will use these settings to launch SQR.

## Properties

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

## Task 3-3-3: Finalize Documentation

Since Change Assistant filters the steps of the upgrade to be specific to your environment, you will want to finalize the filtered documentation using Change Assistant. If you try to follow the delivered nonfiltered version of the upgrade documentation, you will see steps interspersed that do not pertain to your specific upgrade environment.

To save filtered documentation:

1. Select Edit, Finalize Documentation.
2. Click OK.

A dialog box appears stating that finalizing was completed and displaying the final document name.

3. PeopleSoft Change Assistant loads the documentation into the HTML browser that you previously specified in the Change Assistant Options Dialog box. It saves the documentation file to the same folder that was set as your documentation directory.

## Properties

<b>Database Orientation</b>	<b>Initial or MTP</b>	<b>Products</b>	<b>Platforms</b>	<b>Languages</b>
Target	Both	All	All	All



## CHAPTER 4

# Apply PeopleTools Changes

This chapter discusses:

- Understanding PeopleTools Changes
- 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 All Views
- Converting Integration Broker
- Creating All Triggers
- Regenerating Sync IDs
- Updating Object Version Numbers
- Backing Up After PeopleTools Upgrade

---

## Understanding PeopleTools Changes

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

---

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

---

---

### Task 4-1: Performing Script Modifications

This section discusses:

- Understanding Script Modifications
- 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 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

### 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.

#### Task 4-1-1: 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 4-1-2: 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 Oracle-delivered applications. To maintain the tablespace schema used at your site, the DBTSFIX.SQR script will revise the upgrade scripts with the database and tablespace information from your database (the Target database). Tables assigned to tablespaces PSIMAGE or PSIMGR in the upgrade scripts are the exception to this approach. Note that Oracle has reassigned some tables to PSIMAGE or PSIMGR because they now require a 32-KB buffer pool. You must manually edit the “Create Table” statements in the upgrade scripts to replace the tablespace name PSIMAGE or PSIMGR with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool. The database name must also be replaced with the value corresponding to the tablespace you are using.

---

**Properties**

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

**Task 4-1-3: 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 4-1-4: 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 4-1-5: 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 4-1-6: 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 of the scripts in the PS\_HOME\SCRIPTS directory on the file server that conform to this file naming convention:

```
PTxxxTLS.DMS
PTxxxTLsyyy.DMS
```

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

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

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

## Properties

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

## Task 4-1-7: 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 Oracle in this script.

## Properties

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

## Task 4-1-8: 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 Oracle in this script.

## Properties

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

## Task 4-1-9: 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 Oracle in this script.

### Properties

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

## Task 4-1-10: 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 Oracle in this script.

### Properties

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

## Task 4-1-11: 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 4-1-12: 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 PeopleSoft PeopleTools 8.48. Service namespace information, a low-level user on the node, and a low-level permission list for service operations, need to be specified. Consult with your Integration Broker specialist for assistance.

---

**Note.** If you are upgrading from PeopleSoft PeopleTools 8.48 or later, this step and all of the steps in the task “Converting Integration Broker” do not need to be run because the Integration Broker conversion has already been performed. You need to 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	Both	All	All	All

## Task 4-1-13: Edit Multilingual Step Properties

In this step, you will edit the Change Assistant step properties for the multilingual PeopleSoft 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	Both	All	All	All Non-English

---

## Task 4-2: 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 PeopleTools Patch Information
- 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 PeopleSoft PeopleTools system tables by running various scripts.

---

**Important!** From this point forward, run all steps using the new release of PeopleSoft PeopleTools unless otherwise indicated.

---

#### Task 4-2-1: Clean Up Message Data

If you are upgrading from PeopleSoft 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 PeopleSoft PeopleTools 8.47 or earlier, perform this step to clean out obsolete message data. Message functionality and structure changed as of PeopleSoft 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 PeopleSoft 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 PeopleSoft 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 PeopleSoft 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 PeopleSoft PeopleTools releases, and assist in running the script automatically.

---

Follow this procedure to edit your template so that 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 that 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 4-2-2: Update System Catalog Views

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

### Properties

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

## Task 4-2-3: 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 PeopleSoft 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 PeopleSoft PeopleTools release number.

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

If you created RELxxxDBTSFIX (in which xxx is a PeopleSoft PeopleTools release) earlier in your upgrade, the procedure will look at your Output folder and will know to run RELxxxDBTSFIX. If you did not run DBTSFIX, 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 4-2-4: 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 4-2-5: Update PeopleTools Patch Information

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

---

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

---

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

Review the PeopleSoft 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 4-2-6: Rerun Update Statistics for DB2 zOS

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

**Properties**

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

**Task 4-2-7: 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 4-2-8: 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 4-2-9: 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 4-2-10: 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 4-3: 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.

See “Complete Database Changes,” Reviewing Change Control.

## Properties

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

---

## Task 4-4: 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 4-4-1: 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 4-4-2: 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 4-4-3: 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 4-4-4: 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 4-4-5: 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 4-4-6: 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 4-5: Loading Message Data

This step loads system messages in the message catalog.

## Properties

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

---

## Task 4-6: Reviewing PeopleTools Objects

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

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

---

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

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

---

---

**Note.** If you are applying this PeopleSoft PeopleTools-only upgrade to your Demo database, you do not need to run this task. You will need to run this task when you are applying this upgrade to other environments.

---

To review PeopleSoft PeopleTools objects:

1. Apply the PeopleSoft PeopleTools-only upgrade to your Demo database before applying it to other environments.  
You will use this Demo database as the Source database in the compare process.
2. 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.
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 languages loaded into your database.
  - k. Select 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.

---

- 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 PeopleSoft PeopleTools definitions when you copy the PeopleSoft PeopleTools projects in a later task. You must not make any modifications that will affect PeopleSoft PeopleTools objects when reimplementing your customizations after the upgrade.

## Properties

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

---

## Task 4-7: 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.

Oracle 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 PeopleSoft PeopleTools projects with the take action flags set as they originally were set when the database was delivered.

---

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

---

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

### Task 4-7-1: Export and Copy PPLTLS84CUR Project

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

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

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

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

## Properties

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

## Task 4-7-2: Export and Copy PPLTLS84CURML Project

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

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

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

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

## Properties

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

### Task 4-7-3: Export and Copy PPLTLSML Project

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

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

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

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

## Properties

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

### Task 4-7-4: Export and Copy PPLTLS84CURDEL Project

This process deletes specified PeopleSoft PeopleTools objects from your database.

#### Properties

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

### Task 4-7-5: Export and Copy PATCH84X Project

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

---

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

---

See “Install the Software,” Installing the New Release.

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 PeopleSoft PeopleTools release of the patch project.

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

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

### Properties

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

## Task 4-7-6: Export and Copy PATCH84XML Project

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

---

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

---

See “Install the Software,” Installing the New Release.

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 PeopleSoft PeopleTools release of the patch project.

This should correspond to the PeopleSoft 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	Both	All	All	All Non-English

## Task 4-8: Populating Tablespace Data

This section discusses:

- Populate Tablespace Data
- Update Tablespace Names

### Task 4-8-1: 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 Oracle-delivered names, this step makes those same changes in the PeopleSoft record definition.

#### Properties

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

### Task 4-8-2: Update Tablespace Names

The SETSPACE.SQR script identifies the tables with an invalid database name/tablespace combination. However, the PeopleSoft PeopleTools Metadata tables in your Target database contain the database/tablespace values from the Demo (Source) database. This also occurs if your Demo and Target databases are in the same DB2 subsystem after the upgrade/copy is completed. The 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 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 Target.
- 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 Oracle-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 4-9: Building Updated PeopleTools Project

This section discusses:

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

### Task 4-9-1: 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 4-9-2: 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 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 4-9-3: 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 4-10: 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 4-10-1: Export and Copy the PT84TBLSPC Project

This process copies the records that moved to different tablespaces in the new release of PeopleSoft PeopleTools. The upgrade copy options are set to Copy From Source for record DDL to pick up the new tablespace information.

## Properties

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

## Task 4-10-2: 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 PeopleSoft 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 4-10-3: 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 4-10-4: 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 4-11: Loading Base Data**

These Data Mover scripts (DMSs) initialize and modify the data in various PeopleSoft PeopleTools tables required for the system to execute properly. This step runs scripts conforming to the PTxxxTLS.DMS and PTxxxTLSyyy.DMS naming conventions, where xxx represents a PeopleSoft PeopleTools release number and yyy represents a three-letter language code, that are greater than your current PeopleSoft PeopleTools release. For some upgrades, no data scripts are required. In this case, Change Assistant continues to the next step without producing a log file.

**Properties**

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

**Task 4-12: Loading Language Data**

This section discusses:

- Populate Languages
- Load Language Data

## Task 4-12-1: 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	Both	All	All	All

## Task 4-12-2: 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	Both	All	All	All Non-English

---

## Task 4-13: Loading PeopleTools Data

This section discusses:

- Load NonComparable Objects
- Load English Messages
- Load English String Data
- Load Stored Statements Data

## Task 4-13-1: Load NonComparable Objects

This step runs the TLSUPGNONCOMP.DMS script. This script loads the TLSUPGNONCOMP project and all PeopleSoft PeopleTools-owned object definitions that cannot be delivered using Copy Project to File.

### Properties

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

## Task 4-13-2: 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	Both	All	All	All

## Task 4-13-3: 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	Both	All	All	All

## Task 4-13-4: 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 PeopleSoft PeopleTools-delivered COBOL.

### Properties

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

---

## Task 4-14: 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	Both	All	All	All

---

## Task 4-15: 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
- Complete PeopleTools Conversion

### Task 4-15-1: 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 PeopleSoft PeopleTools MultiChannel Framework (MCF) and Reporting Window output option. The program converts standard REN server configurations to the new format, including MCF cluster information. All REN server configuration information is now stored within the database. You must upgrade old REN server configurations before attempting to boot with the new version of PeopleSoft PeopleTools. If you did not have any REN servers configured prior to starting the upgrade, then the UPGMCF843 program does not make any changes. If one of your configurations cannot be converted, error messages will be written in the Application Engine message log.

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 4-15-2: Populate MCF Data

This step runs the Application Engine program MCF\_UPGR\_SND, which populates the PS\_MCFEM\_MAIL\_DSCR table with data. In PeopleSoft PeopleTools 8.44, the REPLY\_TO header functionality was added. The field PS\_MCFEM\_MAIL\_DSCR.MCF\_REPLY\_TO is populated with the values stored in PS\_MCFEM\_MAIL\_MAIN.MCF\_EMAIL\_SENDER.

## Properties

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

## Task 4-15-3: 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 PeopleSoft 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	Both	All	All	All

## Task 4-15-4: 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 change the heading manually. In these cases, the following error is written to the log file:

```
The prompt heading HEADING for Query QUERY is duplicated. Please manually correct.=>
(108, 1108)
```

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

### Properties

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

## Task 4-15-5: 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 4-15-6: Load Conversion Data

This step imports PeopleSoft PeopleTools data conversion Application Engine driver data into your database.

## Properties

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

## Task 4-15-7: Report Conversion Details

This step runs the PTU CONV.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 4-15-8: Run Data Conversion

The Upgrade Driver Application Engine program, PTUPG CONVERT, runs additional PeopleSoft PeopleTools upgrade data conversions. The program then reads the table PS\_PTUPG CONVERT, selecting all rows with the group number of 01 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. Review the output file generated in the previous step for more details on the conversions run in this step.

## Properties

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

## Task 4-15-9: Complete PeopleTools Conversion

The PeopleSoft PeopleTools Upgrade Driver Application Engine program, PTUPG CONVERT, runs additional PeopleSoft PeopleTools upgrade data conversions. The program then reads the table PS\_PTUPG CONVERT, 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 PTU CONV.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 4-16: Creating All Views**

In this step, you will run the CREATEVW.DMS script to re-create all of your views.

**Properties**

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

---

**Task 4-17: 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 PeopleSoft PeopleTools 8.48 or later, this task does not need to be run because the Integration Broker conversion has already been performed. You need to 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 4-17-1: 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	Both	All	All	All

## Task 4-17-2: Creating Integration Broker Objects

The PeopleSoft PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleSoft PeopleTools upgrade data conversions. The program then reads the table PS\_PTUPGCONVERT, selecting all rows with a group number of 03 and ordering them by the row sequence number. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the sequence number order. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

## Properties

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

## Task 4-17-3: Saving Application Messaging Objects

This step copies the PTUPGIBCLONE project to the *PS\_HOME*\projects directory. This project was created by the UPGPT848IBUG Application Engine program and contains objects that were successfully converted. The objects are copied to file as a precautionary measure because they will be deleted from the upgrade database.

After running this step, save the exported project in a permanent location where it can be accessed post-upgrade in case there is a need to review or import the old objects.

## Properties

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

## Task 4-17-4: Exporting Node Transactions

This step runs PTUPG\_TRX\_EXPORT.DMS to save out the old preconversion node transaction data. The generated .dat file is written to the 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	Both	All	All	All

**Task 4-17-5: 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	Both	All	All	All

**Task 4-17-6: Deleting Application Messaging Objects**

This step copies the PTUPGIBDELETE project definition from file. Since the actions in the project are set to Delete, this will delete the obsolete preconversion object definitions from the upgrade database.

**Properties**

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

**Task 4-17-7: 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	Both	All	All	All

**Task 4-18: Creating All Triggers**

This task uses a DMS to create all triggers. Database triggers are database objects that are used to update tables with version information for PeopleSoft Mobile and Optimization functionality.

**Properties**

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

---

**Task 4-19: Regenerating Sync IDs**

This task executes the AE\_SYNCIDGEN Application Engine program to regenerate synchronization IDs. PeopleSoft PeopleTools uses synchronization IDs to give each row a unique identifier.

**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.

**Properties**

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

---

**Task 4-21: Backing Up After PeopleTools Upgrade**

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.

**Properties**

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



## CHAPTER 5

# Complete Database Changes

This chapter discusses:

- Understanding Database Changes
- Updating Language Data
- Booting Servers
- Setting Up Security
- Reviewing PeopleTools Functionality
- Running the Final Audit Reports
- Reviewing Change Control

---

## Understanding Database Changes

You made various changes in the previous chapters, and now it is time to complete these changes and test your upgraded database. You will run reports to audit your database and then turn Change Control back on.

---

## Task 5-1: 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 5-1-1: Run the TSRECPOP Script

In this step, the TSRECPOP script initializes and modifies the data in PeopleSoft PeopleTools-related language architecture tables.

## Properties

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

---

## Task 5-2: Booting Servers

Clear your client workstation browser cache and boot your application servers, web servers, and process scheduler servers.

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

---

**Note.** After applying this release, the Help, About dialog box will show the version of PeopleTools to which you upgraded.

---

## Properties

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

---

## Task 5-3: Setting Up Security

This section discusses:

- Understanding Security
- Synchronize CREF Permissions

### 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: Synchronize CREF Permissions

This section discusses:

- Understanding Content Reference Permissions
- Running the Portal Security Synchronization Process

## Understanding Content Reference Permissions

As part of the PeopleSoft PeopleTools 8.4x Portal architecture, Portal Registry Structures reference permission lists. At this point, however, the Portal Registry Structures copied from the PPLTLS84CUR project do not reference any permission lists on the Upgrade 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 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 in to your Target database.
2. Select PeopleTools, Portal, Portal Security Sync.
3. Click Add a New Value.
4. Enter the run control ID *UPG\_PORTAL\_SYNC\_BOTH*.
5. Click Add.
6. Keep the default value for the default portal registry name in the Portal Name field (for example: *EMPLOYEE*, *CUSTOMER*, or *SUPPLIER*.)
7. Click Save.
8. Click Run.
9. In the Process Scheduler page, check that you set your parameters correctly.
10. Click OK.
11. Click the Process Monitor link to monitor the program's process.
12. Repeat steps 6 through 11 for each Portal name used in the database for your specific applications.  
With each repetition, in step 6 change the Portal Name field to one of the following: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, *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	Both	All	All	All

---

## Task 5-4: Reviewing PeopleTools Functionality

The PeopleSoft Enterprise PeopleBooks detail the current PeopleSoft PeopleTools functionality. There are many new features delivered in the new release that you may want to use. You should now review the PeopleSoft 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 Oracle's PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

You should review the following considerations:

- If you applied a PeopleSoft PeopleTools patch earlier in the upgrade, review the patch documentation and run any steps that you have not already performed during the upgrade.

Check your Change Assistant output directory if you do not know whether a script was already run during the upgrade process.

- You must reimplement any workflow that you want to use in the new release.
- Oracle 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 PeopleSoft PeopleTools. The PeopleSoft PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. After the PeopleSoft PeopleTools portion of the upgrade, Oracle 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.

---

- PeopleSoft 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 PeopleSoft PeopleTools releases. Check the necessary application patches that may be required to use the new version of Verity.

See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).

- As a result, performing PS/nVision drill-down operations on reports that were created prior to upgrade would fail. This is mainly because drill-down hyperlinks are by design hard coded into PS/nVision reports. A simple search and replace utility has been provided that can be used to replace old hyperlinks with new ones. This Microsoft Excel macro is located at %PS\_HOME%\EXCEL\UpdateNvsDrill.xls.

- Integration Broker was rewritten in PeopleSoft PeopleTools 8.48.

If you use Integration Broker, you will need to perform setup configuration and review the explanation of metadata mapping.

See Enterprise PeopleTools PeopleBook: Integration Broker, Appendix: “Understanding Migrated Integration Metadata,” for your new release.

### Properties

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

---

## Task 5-5: 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

### Task 5-5-1: Run the Final DDDAUDIT Report

DDDAUDIT is an SQR that compares your production SQL data tables with the PeopleSoft PeopleTools record definitions to uncover inconsistencies. You can expect some errors from this report. You will review the output from the report in another step.

#### Properties

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

### Task 5-5-2: 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 5-5-3: 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. This project also includes any custom records that you have created in your system.

## Properties

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

### Task 5-5-4: Run the Final Alter Audit

Run the PeopleSoft PeopleTools alter record process on all tables in your system to check whether the PeopleSoft PeopleTools definitions are synchronized with the underlying SQL data tables in your database. This process is called an Alter Audit. An Alter Audit compares the data structures of your database tables with the PeopleSoft PeopleTools definitions to uncover inconsistencies. The Alter Audit then creates an SQL script with the DDL changes needed to synchronize your database with the PeopleSoft PeopleTools definitions.

The Alter Audit script is built using the FNLALTAUD project created in the previous step.

## Properties

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

### Task 5-5-5: Review the Final Audits

The Alter Audit process creates SQL scripts that correct any discrepancies between your PeopleSoft PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies noted by running the generated scripts with your platform-specific SQL tool. The script names are:

```
FNLALTAUD_ALTTBL.SQL
```

```
FNLALTAUD_CRTIDX.SQL
```

---

**Note.** The Alter Audit process also creates the script FNLALTAUD\_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, since all database triggers were created in a previous task.

---

---

**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. Oracle takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Your SYSAUDIT report may have some errors due to references to obsolete PeopleSoft-owned objects. For instance, if a PeopleSoft Permission List is deleted, 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

---

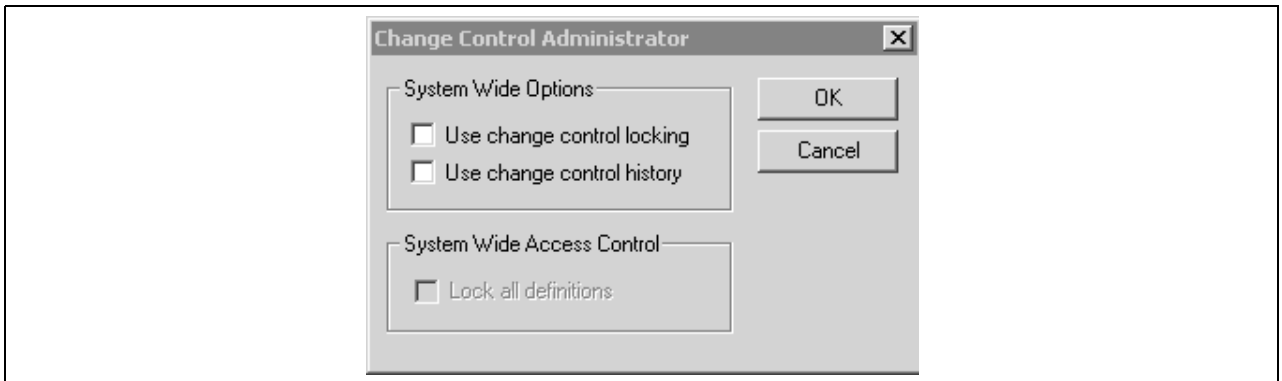
## Task 5-6: Reviewing Change Control

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

- Set Use change control locking and Use change control history according to your site specifications. See “Apply PeopleTools Changes,” Turning Off Change Control.

### Properties

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

## CHAPTER 6

# 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

## Changing the User Interface

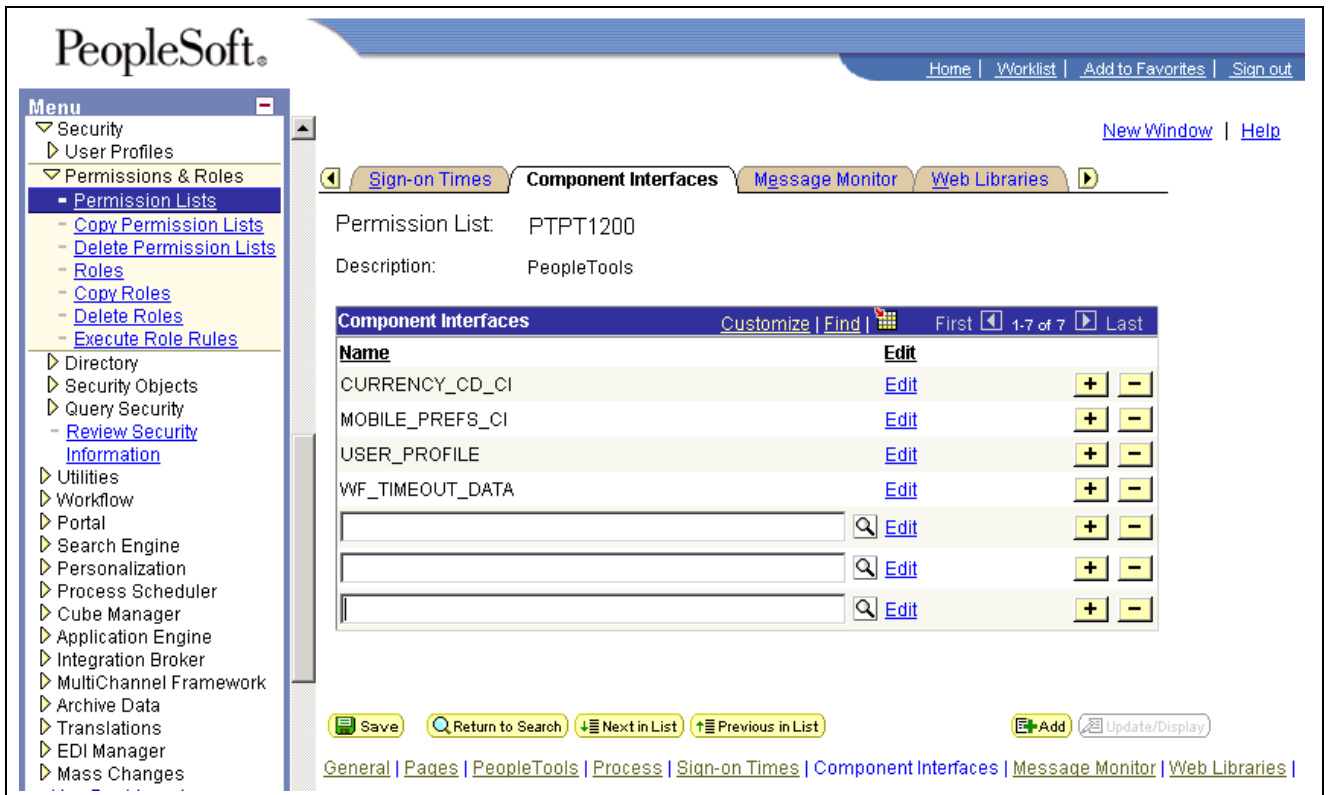
This appendix discusses:

- Change the User Interface
- Change the User Interface for Mobile

### Task A-1: Change the User Interface

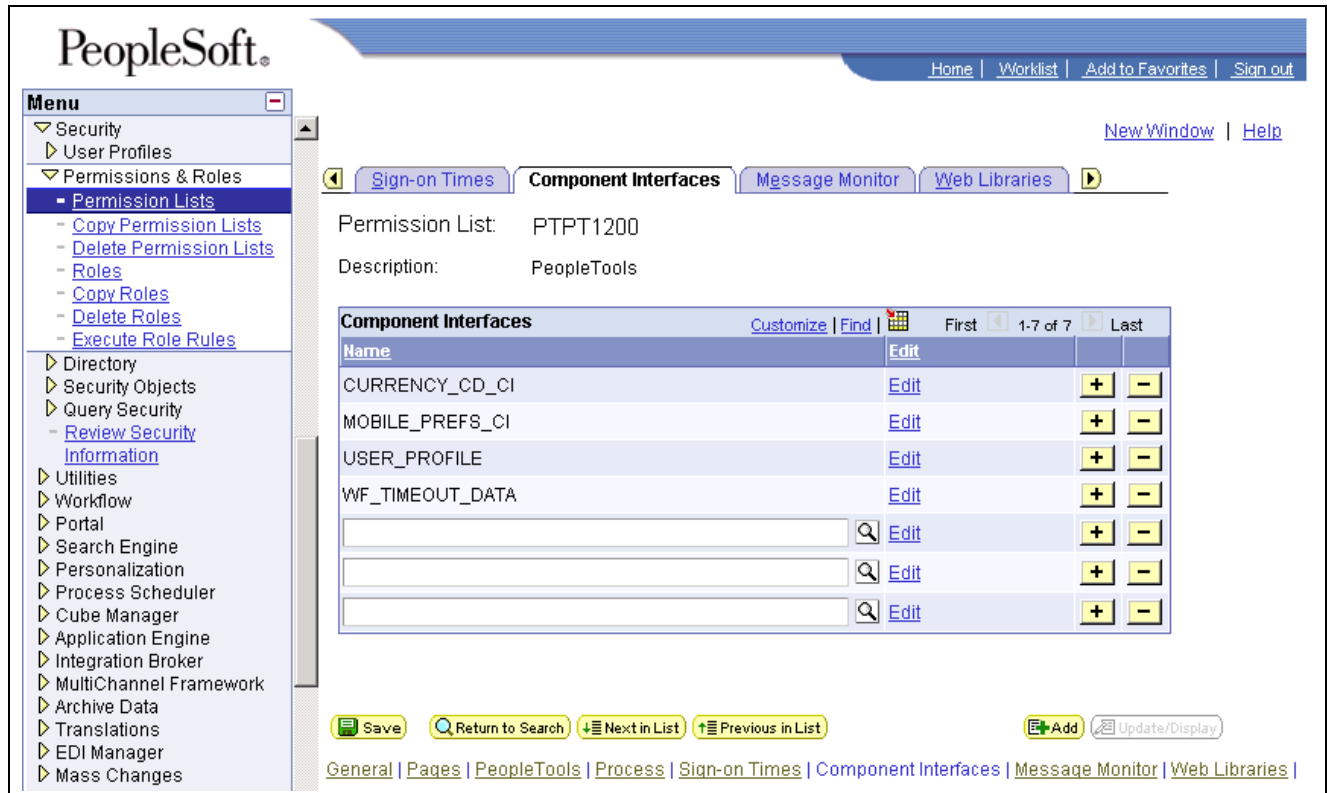
Three user interface options were delivered with your current release of PeopleSoft 8.x. The classic style, the style seen in previous releases of your PeopleSoft application, is set as your default style. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The classic style, shown below, is set as your default style delivered with your PeopleSoft release.



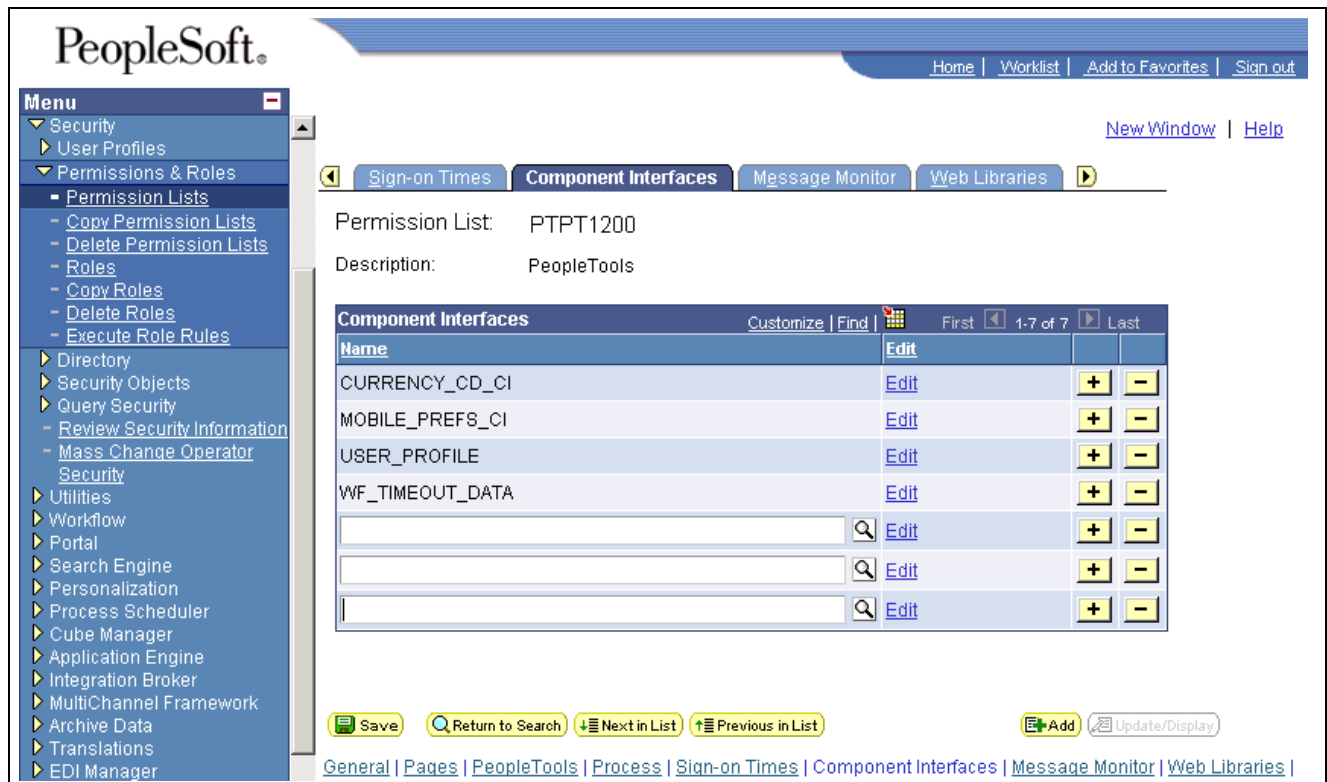
The classic style user interface option

The following example represents the light blue style.



The light blue style user interface option

This example represents the dark blue style.



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. Select the PSALTERNATE Sub Style Sheet, and click 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. Select the PTQUERYSTYLESUB Sub Style Sheet, and click 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. Click Save.

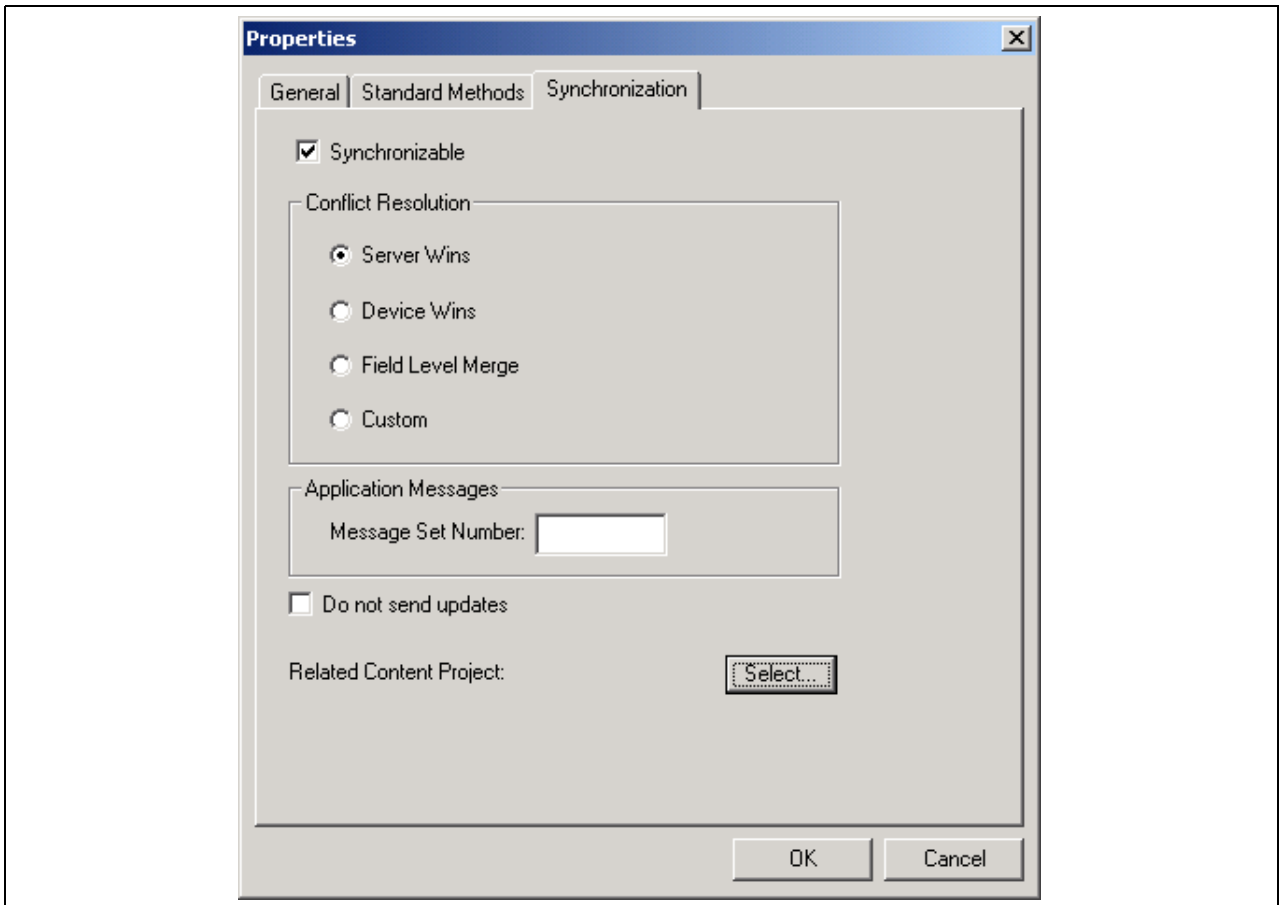
---

## Task A-2: Change the User Interface for Mobile

You use related content projects to synchronize extraneous PeopleSoft 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. Oracle recommends that you associate a given related content project with a synchronizable component interface that is common to your mobile application.

To change the user interface look for mobile applications:

1. Follow the procedure in the previous task, “Change the User Interface,” 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 the Synchronization tab.



Properties dialog box: Synchronization tab

5. Click Select at the Related Content Project field.
6. Find and highlight the desired project and click Select.
7. Click OK.

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 B

# Performance Tips and Techniques

This appendix discusses:

- Understanding Performance Tips and Techniques
- Plan Your Upgrade for Performance
- Improve Performance for Your Platform
- Consult the Global Support Center

---

## Understanding Performance Tips and Techniques

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 B-1: Plan 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.
- 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 B-2: Improve Performance for Your Platform

This section discusses:

- Oracle

- DB2

## Task B-2-1: 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 on autoextend. Autoextend enables tablespaces to grow larger than their set maximum size and will be useful during the upgrade process because 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 B-2-2: DB2

Perform all recommended update statistics on the system catalog as well as the application tablespaces.

Review the DEFINE NO option for index creation. Warning messages are generated when creating indexes on empty tables if this option is set.

See Enterprise PeopleTools Installation Guide for DB2 UDB for z/OS, “Creating a Database,” Creating Indexes, for your new release.

---

## Task B-3: Consult the Global Support Center

If you do have a problem with your upgrade, contact the Global Support Center (GSC). Oracle 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 the RDBMS—Oracle, SQL Server, DB2, and so on—and the release (for example, Oracle 7.3, 8.16, and so on).
- If you are running on Oracle, specify whether you are you running in cost-based or rule-based mode.
- Include your PeopleSoft PeopleTools upgrade path (for example, PeopleSoft PeopleTools 8.40 to 8.41).
- Provide trace files: Tools trace and RDBMS-specific trace files, SQL Explains, and so on.

# Index

## A

- AE\_SYNCIDGEN program 63
- Alter Audit
  - final, reviewing 70
  - final, running 70
  - running initial 7
- application messaging
  - objects, deleting 62
  - objects, saving 61
- application servers
  - backing up PeopleTools directories 21
  - booting 66
  - granting administrator permissions 13
  - installing PeopleTools software 21
  - setting up 22
  - shutting down 20
  - updating REN servers 56
- applying PeopleTools patch 21
- audits
  - Alter Audit 7
  - DDDAUDIT, final 69
  - DDDAUDIT, initial 6
  - final 69
  - initial 6
  - SYSAUDIT, final 69
  - SYSAUDIT, initial 6

## B

- backing up
  - after PeopleTools upgrade 63
  - PeopleTools directories 21
- base data, loading 53
- batch servers
  - backing up PeopleTools directories 21
  - installing PeopleTools software 21
  - setting up 22
- booting servers 66
- building
  - tablespace alter script 52

## C

- Change Assistant
  - creating jobs 24
  - editing multilingual step properties 35
  - finalizing documentation 26

- installing 23
- reviewing upgrade step properties 3
- setting a profile in Configuration Manager 25
- setting up 24
- understanding 19
- change control
  - reviewing 71
  - turning off 40
- common components Pagelet Wizard data, deleting 16
- configuration files 20
- Configuration Manager 25
- connect ID, granting privileges to 38
- connector passwords, encrypting 58
- contacting global support 80
- content reference permissions, synchronizing 66
- conversion
  - loading data 58
  - reporting details 59
  - running data conversion 59
- converting
  - Integration Broker 60
  - PeopleTools objects 56
  - Portal objects 57
  - query prompt headings 58
- Copy of Current Demo database 3
- Copy of Production database
  - backing up 63
- copying
  - PATCH84X project 47
  - PATCH84XML project 48
  - PPLTLS84CUR project 44
  - PPLTLS84CURDEL project 47
  - PPLTLS84CURML project 45
  - PPLTLSML project 46
  - projects 44
  - PT84TBLSPC project 51
- creating
  - Change Assistant jobs 24
  - FNLALTAUD project 70
  - Integration Broker objects 61
  - RUNSTATS.DAT 39
  - triggers 62

views, all 60  
 customized configuration files 20

**D**

## data

base data, loading 53  
 conversion data, loading 58  
 data conversion, running 59  
 English messages, loading 55  
 English string data, loading 55  
 language data, loading 54  
 language data, updating 65  
 MCF data, populating 57  
 PeopleTools data, loading 54  
 stored statements data, loading 55

## data conversion

loading data for PeopleTools 58  
 reporting details 59  
 running for PeopleTools changes 59

## data model definitions, loading

DB2 UNIX/NT 41  
 DB2 z/OS 41  
 Informix 41  
 Oracle 41  
 SQL Server 41  
 Sybase 42  
 understanding 40

## database servers

installing PeopleTools software 21

## database servers, backing up 63

## databases

Copy of Current Demo 3  
 Demo 1  
 performance tips 79  
 preparing for the upgrade 13  
 verifying integrity 14

## DB2 UNIX/NT

loading data model definitions 41  
 performance tips 80  
 rerunning RUNSTATS 39  
 updating statistics 39

## DB2 z/OS

loading data model definitions 41  
 performance tips 80  
 updating statistics 38

## DBTSFIX output scripts

editing 31  
 running 37

## DBTSFIX script, running 30

## DDDAUDIT script

final, running 69

running initial 6

## DDLDB2 script

editing 33  
 running 41

## DDLDBX script

editing 33  
 running 41

## DDLIFX script

editing 34  
 running 41

## DDLMS script, running 41

## DDLORA script

editing 34  
 running 41

## DDLSYB script, running 42

## deleting

application messaging objects 62  
 node transactions 62

## deleting common components Pagelet

Wizard data 16

## Demo database

upgrading 1

## development, freezing 2

## documentation, finalizing in Change

Assistant 26

## downloading fixes 2

## dropping PeopleTools tables 14

**E**

## editing

DBTSFIX output scripts 31

DDLDB2 script 33

DDLDBX script 33

DDLIFX script 34

DDLORA script 34

GRANT script 32

Integration Broker script 34

MSGTLSUPG script 34

multilingual step properties 35

PPLTLS84CURTABLES script 50

PSLANGUAGES script 32

PTxxxTLS scripts 32

tablespace alter script 52

TLSUPGNONCOMP script 32

## encrypting connector passwords 58

## exporting

node transactions 61

PATCH84X project 47

PATCH84XML project 48

- PPLTLS84CUR project 44
- PPLTLS84CURDEL project 47
- PPLTLS84CURML project 45
- PPLTLSML project 46
- projects 44
- PT84TBLSPC project 51

**F**

- file servers
  - backing up PeopleTools directories 21
  - editing PTxxxTLS scripts 32
  - installing PeopleTools software 21
- final audit reports, running 69
- finalizing documentation 26
- fixes, downloading 2
- FNLALTAUD project, creating 70
- freezing development 2

**G**

- generating
  - PPLTLS84CURTABLES script 50
- global support, contacting 80
- GRANT script
  - editing 32
  - running 38
- granting
  - privileges to connect ID 38

**I**

- images, shrinking 15
- Informix
  - loading data model definitions 41
  - updating statistics 39
- initial audits
  - reviewing 11
  - running 6
- installing
  - Change Assistant 23
  - new release 19
  - PeopleTools patch 21
  - PeopleTools software 21
- Integration Broker
  - converting 60
  - defaults, updating 60
  - deletes, preparing 62
  - objects, creating 61
- Integration Broker script, editing 34

- interface, *See* user interface

**L**

- languages
  - loading data 54
  - populating 54
  - updating data 65
- loading
  - base data 53
  - conversion data 58
  - data model definitions 40
  - English messages 55
  - English string data 55
  - language data 54
  - message data 42
  - noncomparable objects 55
  - PeopleTools data 54
  - PeopleTools definition security
    - group 56
  - stored statements data 55
  - system messages 42

**M**

- message data
  - loading 42
  - loading English messages 55
- message data, cleaning up 36
- message queues, purging 16
- migrating records 51
- model definitions, *See* data model definitions
- MSGTLSUPG script, editing 34
- MultiChannel Framework (MCF) data 57
- multilingual step properties, editing 35

**N**

- new release, installing 19
- node transactions
  - deleting 62
  - exporting 61

**O**

- object version numbers, updating 63
- Oracle
  - loading data model definitions 41
  - performance tips 80
  - updating statistics 39

organizing upgrade 1

## P

Pagelet Wizard, deleting common components data 16  
 passwords, encrypting connector passwords 58  
 patch information, updating 38  
 PATCH84X project 47  
 PATCH84XML project 48  
 PeopleSoft PeopleTools  
   release, reviewing 1  
 PeopleSoft Pure Internet Architecture 23  
 PeopleTools  
   conversion, completing 59  
   data, loading 54  
   definition security group, loading 56  
   directories, backing up 21  
   functionality 68  
   objects, converting 56  
   objects, reviewing 42  
   patch, applying 21  
   script 50  
   software, installing 21  
   tables, dropping 14  
   updating patch information 38  
   updating system tables 36  
   upgrade, backing up after 63  
 performance  
   improving your database platform 79  
   planning the upgrade 79  
   tips and techniques 79  
 Portal  
   converting objects 57  
   running security synchronization 67  
 PPLTLS84CUR project 44  
 PPLTLS84CURDEL project 47  
 PPLTLS84CURML project 45  
 PPLTLS84CURTABLES script  
   editing 50  
   generating 50  
   running 51  
 PPLTLSML project 46  
 preparing  
   for the upgrade 13  
   Integration Broker deletes 62  
 process schedulers  
   booting 66  
   shutting down 20  
 production database

identifying empty tables 12

projects

  exporting and copying 44  
   PATCH84X 47  
   PATCH84XML 48  
   PPLTLS84CUR 44  
   PPLTLS84CURDEL 47  
   PPLTLS84CURML 45  
   PPLTLSML 46  
   PT84TBLSPC 51  
 properties table 3  
 PSLANGUAGES script  
   editing 32  
   running 54  
 PT84TBLSPC project 51  
 PTUPGCONVERT program 59  
 PTxxxTLS scripts  
   editing 32  
   running 53

## Q

query prompt headings, converting 58

## R

records

  migrating 51  
 regenerating synchronization IDs 63  
 release, new 19  
 REN servers, updating configuration 56  
 reporting conversion details 59  
 reviewing  
   Alter Audit, final 70  
   change control 71  
   initial audits 11  
   PeopleSoft PeopleTools release 1  
   PeopleTools functionality 68  
   PeopleTools objects 42  
   upgrade step properties 3  
 running  
   AE\_SYNCIDGEN program 63  
   Alter Audit, final 70  
   Alter Audit, initial 7  
   audits 69  
   data conversion, for PeopleTools changes 59  
   DBTSFIX output scripts 37  
   DBTSFIX script 30  
   DDDAUDIT script, final 69  
   DDDAUDIT script, initial 6

- DDLDB2 script 41
- DDLDBX script 41
- DDLIFX script 41
- DDLMS script 41
- DDLORA script 41
- DDLSYB script 42
- GRANT script 38
- initial audits 6
- Portal security synchronization 67
- PPLTLS84CURTABLES script 51
- PSLANGUAGES script 54
- PTUPGCONVERT program 59
- PTxxxTLS scripts 53
- row count report 12
- SYSAUDIT script, final 69
- SYSAUDIT script, initial 6
- tablespace alter script 53
- TLSUPGNONCOMP script 55
- TSRECPOP script 65
- UPGCOUNT script 12
- RUNSTATS.DAT, creating 39

## S

- saving
  - application messaging objects 61
- saving customized configuration files 20
- scripts
  - DBTSFIX, editing 31
  - DBTSFIX, running 30
  - DDDAUDIT 6
  - DDLDB2, editing 33
  - DDLDB2, running 41
  - DDLDBX, editing 33
  - DDLDBX, running 41
  - DDLIFX, editing 34
  - DDLIFX, running 41
  - DDLMS, running 41
  - DDLORA, editing 34
  - DDLORA, running 41
  - DDLSYB, running 42
  - GRANT 38
  - GRANT, editing 32
  - Integration Broker 34
  - MSGTLSUPG 34
  - PeopleTools 50
  - PPLTLS84CURTABLES 50
  - PSLANGUAGES 54
  - PSLANGUAGES, editing 32
  - PTxxxTLS scripts 53
  - PTxxxTLS scripts, editing 32

- SYSAUDIT 6
- TLSUPGNONCOMP 55
- TLSUPGNONCOMP, editing 32
- TSRECPOP 65
- UPGCOUNT 12
- security
  - loading PeopleTools definition security group 56
  - running Portal security synchronization 67
  - setting up 66
  - synchronizing content reference permissions 66
- servers
  - application servers 22, 66
  - batch servers 22
  - booting 66
  - database servers 63
  - file servers 21, 32
  - process schedulers 66
  - REN servers 56
  - shutting down 20
  - web servers 22, 66
- setting
  - Change Assistant profile 25
- setting up
  - application servers 22
  - batch servers 22
  - Change Assistant 24
  - PeopleSoft Pure Internet Architecture 23
  - security 66
  - web servers 22
- shrinking images 15
- shutting down servers 20
- SQL Server
  - loading data model definitions 41
- starting servers 66
- statistics
  - DB2 UNIX/NT, updating 39
  - DB2 z/OS, updating 38
  - Informix, updating 39
  - Oracle, updating 39
  - updating 5
- stopping servers 20
- stored statements data, loading 55
- string data, loading 55
- support, contacting 80
- Sybase
  - loading data model definitions 42

- synchronization IDs, regenerating 63
- synchronizing content reference
  - permissions 66
- SYSAUDIT script
  - running final 69
  - running initial 6
- system
  - messages, loading 42
- system catalog views, updating 37

**T**

- tables
  - moving to new tablespaces 53
  - PeopleTools system tables, updating 36
  - PeopleTools, dropping 14
  - running row count report 12
- tablespaces
  - alter script 53
  - alter script, building 52
  - alter script, editing 52
  - migrating records to 51
  - populating data 49
  - updating names 49
- TLSUPGNONCOMP script
  - editing 32
  - running 55
- triggers, creating 62
- TSRECPOP script 65
- turning off change control 40

**U**

- updating
  - Integration Broker defaults 60
  - language data 65
  - PeopleSoft object version numbers 63
  - PeopleTools patch information 38
  - PeopleTools system tables 36
  - REN server configuration 56
  - statistics for DB2 UNIX/NT 39
  - statistics for DB2 z/OS 38
  - statistics for Informix 39
  - statistics for Oracle 39
  - statistics, initial 5
  - system catalog views 37
  - tablespace names 49
- updating statistics
  - DB2 UNIX/NT 39
  - DB2 z/OS 38
  - Informix 39

- Oracle 39
- UPGCOUNT script, running 12
- upgrade
  - installing new release 19
  - organizing 1
  - PeopleTools, backing up after 63
  - planning for performance 79
  - preparing for 13
  - reviewing step properties 3
  - upgrading Demo database 1
  - user, verifying 13
- user interface
  - changing for desktop computers 75
  - changing for mobile devices 77

**V**

- verifying
  - database integrity 14
  - upgrade user 13
- version numbers, updating 63
- views, creating 60

**W**

- web servers
  - backing up PeopleTools directories 21
  - booting 66
  - installing PeopleTools software 21
  - setting up 22
  - shutting down 20