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PeopleSoft HCM and Campus Solutions 8.9 MP1 to HCM 9.1 Feature Pack 2 Upgrade

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PeopleSoft HCM and Campus Solutions 8.9 MP1 to HCM 9.1 Feature Pack 2
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About This Documentation

Understanding This Documentation

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

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

Prerequisites

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

Audience

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

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

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

Oracle recommends that you complete training before performing an upgrade.

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

Organization

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

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

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Typographical Conventions

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

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the upgrade. Monospace also indicates messages that you may receive during the upgrade process.
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading *See Also* refer you to additional documentation that has more information regarding the subject.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
Note. Note text.	Text that begins with *Note* indicates information that you should pay particular attention to as you work with your PeopleSoft system.
Important! Important note text.	A note that begins with *Important!* is crucial and includes information about what you need to do for the system to function properly.
Warning! Warning text.	A note that begins with *Warning!* contains crucial configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these products and product families:

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- Oracle’s PeopleSoft Application Designer
- Oracle’s PeopleSoft Change Assistant
- Oracle’s PeopleSoft Data Mover
- Oracle’s PeopleSoft Process Scheduler
- Oracle’s PeopleSoft Pure Internet Architecture
- Oracle’s PeopleSoft Customer Relationship Management
- Oracle’s PeopleSoft Financial Management
- Oracle’s PeopleSoft Human Capital Management
- Oracle’s PeopleSoft Enterprise Learning Management
- Oracle’s PeopleSoft Pay/Bill Management
- Oracle’s PeopleSoft PeopleTools
- Oracle’s PeopleSoft Enterprise Performance Management
- Oracle’s PeopleSoft Portal Solutions
- Oracle’s PeopleSoft Staffing Front Office
- Oracle’s PeopleSoft Supply Chain Management

Note. This documentation refers to both Oracle’s PeopleSoft Portal Solutions and to PeopleSoft PeopleTools portal or portal technologies. PeopleSoft Portal Solutions is a separate application product. The PeopleSoft PeopleTools portal technologies consist of PeopleSoft Pure Internet Architecture and the PeopleSoft PeopleTools portal technology used for creating and managing portals.

See http://www.oracle.com/us/products/applications/peoplesoft-enterprise/index.html for a list of PeopleSoft products.

Related Information

Oracle provides additional information that may help with your upgrade. The following information is available on My Oracle Support:

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

  Go to My Oracle Support and search for the Release Notes for your product and release level.

- *Installation Guides.* Before you begin your upgrade, ensure that you have installed PeopleSoft PeopleTools and completed the installation of your PeopleSoft application, if applicable.

  To find the installation documentation for PeopleSoft PeopleTools or for your PeopleSoft application, go to My Oracle Support and search for the installation guide for your product and release level.

- *Upgrade Documentation.* The upgrade documentation on My Oracle Support contains information posted after shipment of this release that may not be included in these upgrade instructions. Always check My Oracle Support for the most current documentation and information.

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Important! Before upgrading, it is imperative that you check My Oracle Support for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

To find updates to the upgrade documentation, go to My Oracle Support and search for the upgrade documentation for your product and release level.

- *Getting Started on Your PeopleSoft Upgrade.* Before beginning a PeopleSoft upgrade, you must complete the tasks in the document *Getting Started on Your PeopleSoft Upgrade*. This document guides you through planning your upgrade as well as installing the software necessary to upgrade to the new PeopleSoft product release. If you did not complete the tasks in this documentation, do so now.

  Go to My Oracle Support and search for *Getting Started on Your PeopleSoft Upgrade*.

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

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CHAPTER 1

Planning Your Application Upgrade

This chapter discusses:

- Understanding Application Upgrade Planning
- Understanding Your Upgrade
- Preparing Your Upgrade Job
- Identifying Customizations
- Backing Up Demo Databases

Understanding Application Upgrade Planning

You must make a copy of your production database before you start preparations for the technical portion of the upgrade. Unless otherwise noted, run these tasks on your Copy of Production database (not the New Release Demo database). In this chapter, you will also prepare your upgrade job and identify any customizations you have made to your database.

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

Task 1-1: Understanding Your Upgrade

This section discusses:

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

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Understanding PeopleSoft Upgrades

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

Task 1-1-1: Verifying the Software Installation

Before continuing with the upgrade, you must complete all of the tasks in *Getting Started on Your PeopleSoft Upgrade*, "Starting Your Upgrade." Verify that the following tasks are complete:

- Installing the new release.
- Applying PeopleSoft PeopleTools patches.
- Installing PeopleSoft Change Assistant.
- Making a Copy of Production Database.
- Retrieving and applying upgrade files.
- Creating and configuring an upgrade job.
- Setting the Configuration Manager profile.
- Reviewing upgrade step properties.

Properties

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

Task 1-1-2: Defining Upgrade Databases

The following databases will be used during your upgrade:

- The New Release Demo database always refers to the database delivered with your new PeopleSoft release.

  It contains the new and changed database objects that you want to add. The New Release Demo database is also referred to as the Demo database later in the upgrade.

- The Copy of Production database refers to the copy of your production database, into which you will add the new and changed objects for this release from the New Release Demo database.

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

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

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Properties

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

Task 1-1-3: Increasing Database Space

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

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

See Appendix: "Sizing Tables for the Upgrade."

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

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

Properties

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

Task 1-1-4: Reviewing Upgrade Notes and Tips

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

- Performance Recommendations

  Before beginning your upgrade, you should plan for performance issues as outlined in the *Getting Started on Your PeopleSoft Upgrade* documentation.

- Tax Update Status for Payroll Sites

  PeopleSoft HCM 9.1 Feature Pack 2 is current through Tax Update 11–E.

  Oracle recommends that you run your upgrade using your Copy of Production at the same Tax Update level as the HRMS New Release Demo database. If your New Release Demo database is not at the same Tax Update level as listed above, follow the recommendations in the appendix "Upgrading with Tax Updates."

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Note. If you are unsure of what tax update level you are on, from your Copy of Production select Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Tax Update, and note the latest date that is listed.

- Upgrading Approvals for Job Openings and Job Offers

  This upgrade will not upgrade the approvals for job openings and job offers. To upgrade your approvals after completing this upgrade, see My Oracle Support for the Approval Documentation. If you do not want to use the documentation from My Oracle Support, all job openings and job offers must already be approved or not started before beginning this upgrade.

- Reviewing PeopleSoft HRMS Record Changes

  Many record changes in the new PeopleSoft release will affect the data in your system. These changes will be made through data conversion. To fully understand these changes, please review the appendixes referenced below.

  See Appendix: "Reviewing Benefits Changes."

  See Appendix: "Reviewing HRMS Changes."

- Upgrading PeopleSoft Time and Labor Rules

  Your custom PeopleSoft Time and Labor Rules will be manually recompiled during your initial upgrade pass only. You should not create any new custom rules in your production database after you have created your Copy of Production database for the initial pass until after you have completed your final Move to Production and have gone live with the new PeopleSoft release. If you do create new PeopleSoft Time and Labor Rules in production, you should manually create them again in your upgraded Copy of Production database from the previous pass before starting your next pass. This is the database that will be the source database for your Move to Production pass.

- Reviewing PeopleSoft Time and Labor Integration with Absence

  If you use PeopleSoft Time and Labor with PeopleSoft Absence Management, make sure you read the appendix "Reviewing Time and Labor Integration with Absence" to understand how the integration has changed technically and functionally.

- Microsoft SQL Server Column Statistics

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

Properties

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

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Task 1-2: Preparing Your Upgrade Job

This section discusses:

- Modifying the DB2 Scripts
- Editing the Language Swap Scripts
- Editing the RNHCUPK02 Script for Your Platform
- Evaluating Upgrade Steps for Your Upgrade Job
- Modifying Compare Report Options
- Optimizing the Create and Alter Process

Task 1-2-1: Modifying the DB2 Scripts

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

Note. You can find these scripts in the new release PS_APP_HOME directory.

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

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

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

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

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

```
DLUPX02I.DMS
DLUPX13I.DMS
DLUPX96I.DMS
```

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

In several steps in the upgrade process, project definitions are copied into the database. Any DB2 z/OS scripts that are built from these projects need to be modified before running them. When the SQL scripts are built after copying the projects, the database/tablespace names are the default values. These values need to be changed to the Target database-specific values.

Set the steps that run the generated scripts (typically, the "Running the xxx Script" step following a "Building/Generating the xxx Script/Project" step) in your PeopleSoft Change Assistant job to a manual stop, and edit the scripts for correct database/tablespace information. To set a step as a manual stop in PeopleSoft Change Assistant, highlight the step and select Edit, Stop from the menu bar.

In chapter 5, “Applying Application Changes,” set the step Re-Creating Upgrade Tables (in the task Modifying the Database Structure) as a manual stop and edit the UPGCONVERT_CRTTBL.SQL script.

```
DLHCGCHS10I.DMS
```

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```
DLHCGCHS11I.DMS
DLHCGCHS12I.DMS
DLHCGCHS13I.DMS
DLHCGCHS14I.DMS
DLHCGCHS15I.DMS
DLHCLASYSI.DMS
DLHCSYSI.DMS
DLHCUPP01I.DMS
DLHCUPS04I.DMS
UVHCGPP60I.DMS
RNHCUPK02DB2.SQL
```

Properties

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

Task 1-2-2: Editing the Language Swap Scripts

This step should only be completed if your Copy of Production has a base language other than English.

Later in the upgrade, you will swap system data tables and PeopleSoft PeopleTools managed object tables that have related languages on your New Release Demo database. This ensures that the tables are translated correctly when you copy to your Copy of Production. In this step, you must edit the swap scripts to set your New Release Demo database language to the same language as your Copy of Production.

Follow the edit instructions in each script.

Note. You can find your application script in the PS_APP_HOME directory. The PT_RELEASE_SWAP.DMS script is in the PS_HOME directory.

The swap scripts for your path are:

```
DLHCLASWAP.DMS
PT_RELEASE_SWAP.DMS
```

Properties

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

Task 1-2-3: Editing the RNHCUPK02 Script for Your Platform

Edit the SQL rename script *for your platform* to comment out the index/rename commands for the tables that may not exist in your database. You will find these commands at the bottom of your script.

The script for your upgrade path is:

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```
RNHCUPK02xxx.SQL
```

Where “xxx” represents your platform.

Properties

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

Task 1-2-4: Evaluating Upgrade Steps for Your Upgrade Job

In this step, evaluate steps in your upgrade job that need editing in order to meet your project requirements.

- Editing the Create and Alter Scripts: If you are reusing any create and alter scripts from a prior upgrade pass during any Move to Production passes, review the scripts to determine if the appropriate edits have been made. If they have been made, then at this time, the step Editing the Create and Alter Scripts may be marked as complete.
- Running the RNHCUPK03 Script and Running RNHCUPK03 Script on Copy of Current Demo: Determine if these steps are needed in your upgrade. If they are needed follow the step instructions to automate it.

Properties

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

Task 1-2-5: Modifying Compare Report Options

For compare steps, PeopleSoft Change Assistant templates are delivered with the default reports filter turned on in the compare options. This limits the size of the reports and keeps them manageable. Before you start the compares, review the PeopleSoft Change Assistant job for each compare step listed below and modify the compare options based on your requirements.

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

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

To modify upgrade compare options:

1. Highlight the “Running the UPGCUST Compare” step and right-click.
2. Select Step Properties.

   The Step Properties dialog box appears.
3. Click Upgrade.

   The Compare and Report dialog box appears.

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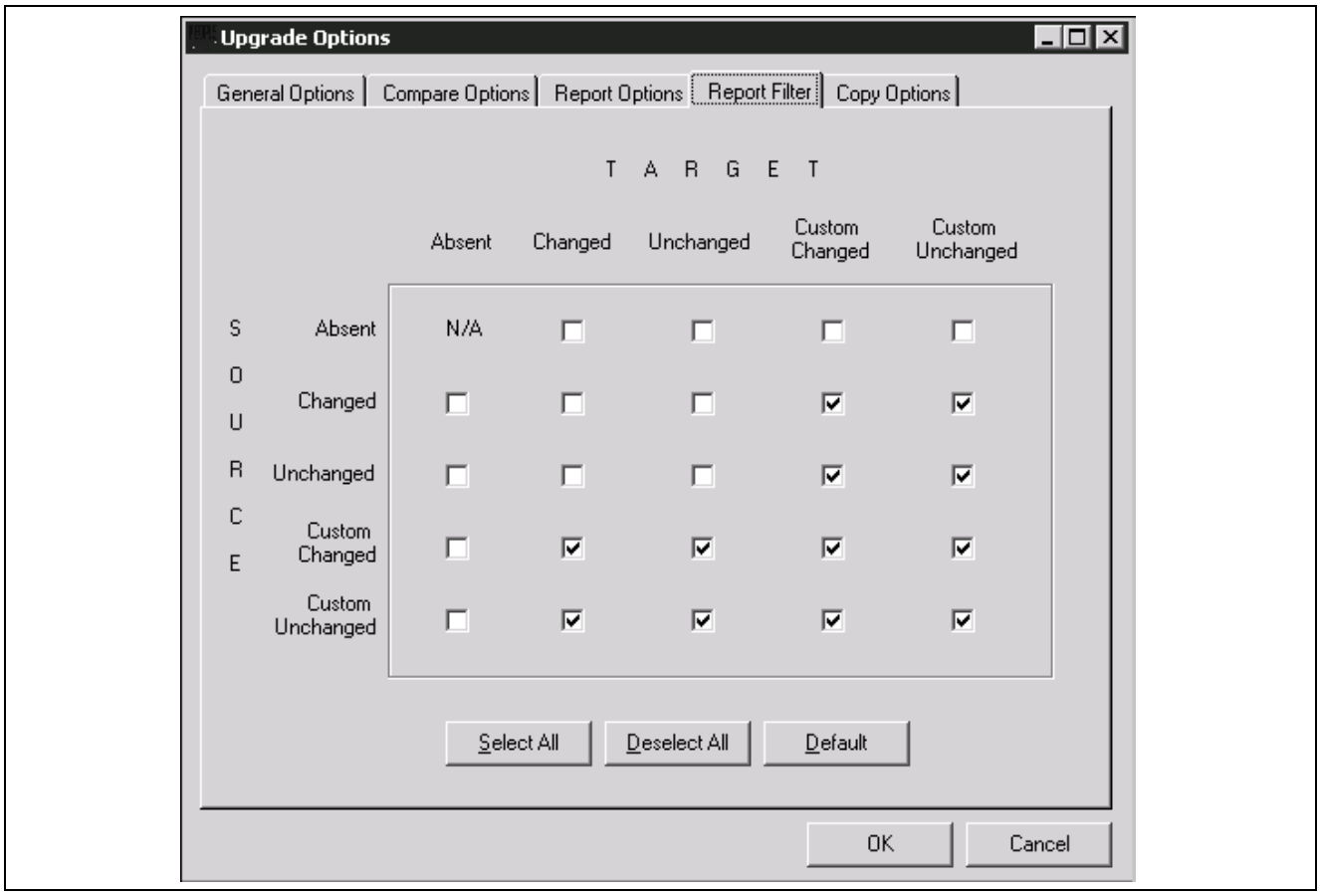
4. Click Options.
5. Select the Report Filter tab.

   The default options include your custom changes on the reports.
6. Change the default options as necessary and click OK.

   This example shows the Report Filter page of the Upgrade Options dialog box, with several options selected.



Upgrade Options page, Report Filter tab

7. In the Compare and Report dialog box, click OK.
8. In the Step Definitions dialog box, click OK.
9. Repeat steps 2 through 8 for the Running the New Release UPGCUST Compare and Creating the UPGIB Project steps.
10. Select File, Save Job.

Properties

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

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Task 1-2-6: Optimizing the Create and Alter Process

During the initial pass, you generate and sometimes edit, then execute the SQL scripts to create and alter tables. In the Move to Production pass, you may be able to skip the SQL script generation steps and use the SQL that you previously generated and edited. This practice may save time in your critical go-live window and is the ultimate goal, but it is an incremental process to get to that point.

In the first Move to Production pass, everyone must generate the SQL scripts. There are small differences between the initial and Move to Production passes that require the SQL to be regenerated in at least one Move to Production pass. The PeopleSoft Change Assistant templates are delivered with the steps set this way.

In subsequent Move to Production passes, you may choose to turn off the generation steps if possible. If you have not changed any records at the end of one Move to Production pass then you can use that SQL in your next pass. If you have done anything to change records, you need to generate the SQL scripts again. This includes changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.50 or 8.51), applying updates from My Oracle Support that involve record changes, or making additional customizations to records.

If you chose to skip regenerating the scripts, mark each step complete in your PeopleSoft Change Assistant job. You can also modify the step properties in the template so the step will never show up in any future Move to Production job.

To modify the step properties:

1. Double-click the step to open the step properties dialog box.
2. Change the Type of Upgrade to *Initial Upgrade*.

In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. PeopleSoft Change Assistant looks for the SQL scripts in the output directory set on the job's Database Configuration. Therefore, ensure that PeopleSoft Change Assistant will find the SQL scripts when it tries to run them.

The steps you may choose to skip regenerating the scripts are:

- Creating New Tablespaces
- Creating the Upgrade Projects
- Editing the Create and Alter Scripts

Properties

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

Task 1-3: Identifying Customizations

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

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Important! If you use any of the features listed above, you must analyze your data because the upgrade replaces the data in the Target database with the delivered data in the New Release Demo database.

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

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

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

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

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

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

Review the tables that will be overwritten in the scripts listed in this table:

Tables	Script
Message Catalog	**DLUPX01E.DMS**
SQR Strings	**DLUPX04E.DMS**
EDI	**DLUPX05E.DMS**
Mass Change	**DLUPX06E.DMS**
XML Service Information	**DLUPX13E.DMS**
Setup Manager, Verity Based Indexes, and Optimization Models	**DLUPX16E.DMS**
Pagelet Wizard	**DLUPX14E.DMS**

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

```
DLHCLASYSE.DMS
DLHCLASYSI.DMS
```

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

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Tables	Scripts
Mass Change	**MVAPPEXP.DMS** **MVAPPIMP.DMS**
EDI	**MVPRDEXP.DMS** **MVPRDIMP.DMS**
Strings	**MVAPPEXP.DMS** **MVAPPIMP.DMS**
Messages	**MVAPPEXP.DMS** **MVAPPIMP.DMS**
XML Service Information	**MVPRDEXP.DMS** **MVPRDIMP.DMS**
Setup Manager, Verity Based Indexes, and Optimization Models	**MVAPPEXP.DMS** **MVAPPIMP.DMS**
Pagelet Wizard	**MVUPX16E.DMS**

See Also

"Applying Application Changes," Loading Data for Data Conversion.

"Applying Application Changes," Loading Data to Complete System Setup.

Properties

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

Task 1-4: Backing Up Demo Databases

This section discusses:

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

Task 1-4-1: Backing Up the Copy of Current Demo

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

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Properties

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

Task 1-4-2: Backing Up the New Release Demo

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

Properties

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

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CHAPTER 2

Preparing Your Database for Upgrade

This chapter discusses:

- Understanding Database Preparation
- Applying Upgrade Planning Files
- Editing Upgrade Planning DB2 Scripts
- Running Upgrade Planning Scripts
- Updating Statistics
- Running Initial Audit Reports
- Verifying Global Payroll
- Running Application Audits
- Preparing Approvals for Upgrade
- Preparing the Benefits Upgrade
- Auditing Global Payroll Settings
- Making Functional Decisions
- Reviewing Table Row Counts
- Preparing Your Database
- Renaming Records and Fields
- Comparing Customizations
- Preparing for the Application Upgrade
- Backing Up After Preparing Your Database

Understanding Database Preparation

In this chapter, you begin preparations for the upgrade. Unless otherwise noted, run these tasks on your Copy of Production database (not the New Release Demo database). These tasks do not use the new PeopleSoft release. You should use your current codeline and current PeopleSoft PeopleTools release to perform these tasks unless instructed otherwise.

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

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Task 2-1: Applying Upgrade Planning Files

This section discusses:

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

Understanding Applying Upgrade Planning Files

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

Task 2-1-1: Applying the UPGOPT Project

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

To apply the UPGOPT project:

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

   This copies the UPGOPT project onto your Copy of Production database.
6. Using your current codeline, launch PeopleSoft Data Mover and sign in to your Copy of Production database.
7. Run the following script to load Access Groups and the Upgrade Query Tree:

   PS_APP_HOME\SCRIPTS\UPGOPT_HC89.DMS

Properties

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

Task 2-1-2: Building the UPGOPT Project

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

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To build the UPGOPT project:

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

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

Properties

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

Task 2-1-3: Setting Up Upgrade Planning Security

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

To set up security:

1. Select PeopleTools, Security, Permissions and Roles, Permission Lists.
2. Enter the permission list for the users who will be reviewing and setting up functional requirements for the upgrade, then click Search.
3. On the Pages tab, select or insert the menu *UPG_DEFINE_DEFAULTS* and click Edit Components.
4. Select all of the items in the menu.
5. Click OK.
6. Click Save.
7. Select PeopleTools, Security, Permissions and Roles, Permission Lists.
8. Select the permission list for the users that review and set up functional requirements for the upgrade.

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9. Select the Query tab.
10. Select Access Group Permissions.
11. Add one row with the tree name UPG_QUERY_TREE and the access group UPG_ACCESS_GROUP.
12. Select OK, Save.

Properties

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

Task 2-2: Editing Upgrade Planning DB2 Scripts

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

Note. You can find the scripts in the old release PS_APP_HOME directory.

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

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

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

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

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

```
PUUPX07.DMS
PUHCHRS10.DMS
```

Properties

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

Task 2-3: Running Upgrade Planning Scripts

This section discusses:

- Understanding Running Upgrade Planning Scripts
- Importing GPCE Upgrade Default Options

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Understanding Running Upgrade Planning Scripts

In this task, you run scripts that will load data needed to complete the task Making Functional Decisions later in the upgrade.

Task 2-3-1: Importing GPCE Upgrade Default Options

In this step, you import the PeopleSoft Global Payroll Country Extension (GPCE) upgrade default options defined during the previous pass for use during the Move to Production.

The script name for your upgrade is:

```
PUHCGPP01I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 2-4: Updating Statistics

Run this task to improve the 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 Getting Started on Your PeopleSoft Upgrade, Appendix: “Improving Performance.”

Properties

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

Task 2-5: Running Initial Audit Reports

This section discusses:

- Understanding Running Initial Audit Reports
- Running the Initial DDDAUDIT Report
- Running the Initial SYSAUDIT Report
- Running the Initial SYSAUD01 Report
- Creating the INITALTAUD Project

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- Running the Initial Alter Audit
- Reviewing the Initial Audits

Understanding Running Initial Audit Reports

In this task, you run and review your initial DDDAUDIT, SYSAUDIT, SYSAUD01, and Alter Audit reports. Running these reports ensures that your database is as clean as possible for the remainder of the upgrade.

Task 2-5-1: Running 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.

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

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

See Reviewing 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 2-5-2: Running 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.

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

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

See Reviewing 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 2-5-3: Running the Initial SYSAUD01 Report

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.52 or higher.

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SYSAUD01 is an SQR script used to identify “orphaned” PeopleSoft objects. SYSAUD01 also identifies other inconsistencies within your database.

In this step, SYSAUD01 is run using SQR from your current (old) PeopleSoft release against the Copy of Production to ensure that you are starting with a clean database.

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

See Reviewing 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 2-5-4: Creating the INITALTAUD Project

This section discusses:

- Understanding Creating the INITALTAUD Project
- Running the Step Creating the INITALTAUD Project Automatically
- Creating the INITALTAUD Project

Understanding Creating the INITALTAUD Project

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

If your old PeopleSoft PeopleTools release is 8.44 or later, you can run this step automatically in PeopleSoft Change Assistant. To run this step automatically, proceed to “Running the Step Creating the INITALTAUD Project Automatically.” If your old PeopleSoft PeopleTools release is earlier than 8.44, proceed to “Creating the INITALTAUD Project.”

Note. If you are performing an application-only upgrade, this step is already delivered as an automated step.

Running the Step Creating the INITALTAUD Project Automatically

To run the step Creating the INITALTAUD Project automatically:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Running Initial Audit Reports, right-click the step Creating the INITALTAUD Project, and then select Step Properties.
3. In the Step Properties dialog box, change the value in the Type field from *ManualStop* to *CreateProject*.
4. Click OK.
5. Select Edit, Run.

Creating the INITALTAUD Project

To create the INITALTAUD project:

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

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

11. Click OK.

Properties

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

Task 2-5-5: Running 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.

Properties

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

Task 2-5-6: Reviewing 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, SYSAUD01, and DDDAUDIT reports and correct any discrepancies. When application tables are deleted from PeopleSoft 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.

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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 the scripts INITALTAUD_ALTTBL.SQL, INITALTAUD_CRTIDX.SQL, and INITALTAUD_CRTTRG.SQL. 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.

Note. You will rerun the DDDAUDIT, SYSAUDIT, and SYSAUD01 SQR scripts later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to rename the files manually after completing this task.

Note. Additionally, you may choose to clean up the discrepancies listed in these audits directly in production if they are also an issue in your production database.

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 2-6: Verifying Global Payroll

Complete this step if you have Oracle's PeopleSoft Global Payroll installed.

As part of performing the upgrade process, it is important that all Payroll activities are in a state of completion. Verify that all calendar group IDs were finalized, and that any payroll dependent interfaces were also processed; such as transactions sent to Banking, General Ledger, or other third-party vendors. Also, make sure that you do not have any packages that are in the process of being upgraded from one database to another. All packager-related processing needs to be completed before starting the upgrade process.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Core	All	All

Task 2-7: Running Application Audits

This section discusses:

- Running Upgrade Reports
- Running the Contract Pay Audit Report
- Correcting Garnishment Payee Data
- Running the Pending Absence Data Report
- Reviewing Career Planning Mobility

Task 2-7-1: Running Upgrade Reports

This section discusses:

- Running Upgrade Reports
- Running the US Custom Garnishment Rules Audit Report
- Running the Institution Report for France

Running Upgrade Reports

In this step, you run upgrade reports that list erroneous data that you need to clean up before starting the upgrade.

To run the application audit reports:

1. From your web browser, sign in to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Reports.
3. Select the appropriate reports.

   Note. Reports are identified and explained in the remainder of this task. You will need to perform this step for all reports identified below.

4. Select Add a New Value.
5. Enter the run control *UPGRADE*.
6. Click the Run button.
7. Click the Process Monitor link to monitor the program's process.
8. Repeat the steps above for all reports identified in the remainder of this task.

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Running the US Custom Garnishment Rules Audit Report

Run the U.S. Custom Garnishment Rules Audit Report, PUPYS04.SQR.

This report has the same layout as the Garnishment Rules Report, except it lists only U.S. rules maintained by you.

If there are any rules listed in this report, you have two options:

- You may decide that you no longer need the custom rule, in which case you will have to update all active garnishment orders to replace your rule with another rule later in the upgrade.
- You may decide that you still need your custom rule, in which case you will have to re-create that rule later in the upgrade.

If there are no rules listed in this report, you do not have any U.S. custom garnishment rules and do not have to take any action.

See Appendix: "Understanding Garnishments Changes."

Running the Institution Report for France

Run the Institution Report for France, PUFRS01.SQR.

Run this report if you have implemented PeopleSoft Human Resources for France. This report lists institutions associated with more than one pension code.

A given institution should be attached to only one pension code. In the current application, the institutions listed in this report are attached to several pension codes.

To update the Pension/Contingency Funds definitions:

1. Select Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Pension/Contingency Funds.
2. On the Pension/Contingency Funds page, review the Pension/Contingency Funds definitions and remove any duplicate institution names so that each institution name appears in only one Pension/Contingency Funds definition.
3. Rerun the report to verify that all institutions are attached to only one pension code.

Properties

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

Task 2-7-2: Running the Contract Pay Audit Report

Use report PUPYP05.SQR to review contract payment data.

Important! Complete this step *only* if you license PeopleSoft HRMS E&G. Otherwise you can skip this step.

This report gives you a better understanding of what will occur during data conversion. The report lists all rows from the CONTRACT table. Therefore, one employee may have one or more contracts and/or one contract may have one or more effective dates. The following fields are listed in the report and drive the data conversion:

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- Contract Status: This is a temporary field and will not be stored after the upgrade. This field determines the value of the contract number, creation of new tables, and updates of additional pay tables. The status can be one of the following:
  - Active: Appears for contracts whose payments have started and are not complete.
  - Future: Appears for contracts that did not start (the payment begin date is greater than the last confirmed pay end date).
  - Complete: Appears for contracts that are complete (payment end date is equal to or less than the last confirmed pay end date).
- Work Schedule: Is used during data conversion and is stored in the pay group of the employee.
- Holiday Schedule: Is used during data conversion and is stored in the JOB record of the employee.
- Contract ID: This is actually the contract number. In the new release, each new contract has a unique contract number. During the upgrade, existing data is converted as follows:
  - If a contract is *Active* or *Complete* the Contract ID is the empl rcd + 1.
  - If the contract is *Future* the Contract ID will be a maximum of the empl rcd + empl rcd + 2.
  - If an employee has more than one *Complete* contract all the contracts will have the same Contract ID.
  - If an employee has more than one *Future* contract all the contracts will have the same Contract ID.

If you need to make any changes to the current contract data follow the procedure below.

To make changes:

1. Select Workforce Administration, Job Information, Contract Administration, Update Contract Pay NA.
2. Enter EmplID from the report.
3. Click Search.
4. Insert a new effective date and update contract information and/or contract actuals.
5. Click Save.

Properties

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

Task 2-7-3: Correcting Garnishment Payee Data

This section discusses:

- Understanding Garnishment Payee Data
- Running the Garnishment Payee Audit Report
- Updating Garnishment Orders
- Updating Payee Information in the Payee Table

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Understanding Garnishment Payee Data

If you are using PeopleSoft Accounts Payable Interface and running the Extract Non-Tax Deductions program, you have to ensure that the payee defined in the active garnishment order is set up in the Payee Table. The extract program will not be able to create an invoice if the payee is missing from the Payee Table.

To verify garnishment payee data, you should run the Garnishment Payee Audit report.

The report has two sections:

- Active garnishment orders (orders with the status Approved or Received)
- Inactive garnishment orders (orders with any status other than Approved or Received)

If there are any active orders listed in the report, you will have to correct the data. You can correct the data either by correcting the payee data on the garnishment order, or you can add payee information to the Payee Table.

If there are any inactive orders listed in the report, you can decide either to leave the data as is, or to correct the data. Leaving inactive orders without updating them is acceptable. Inactive orders will not be processed after the upgrade; therefore, you will not need to create an invoice. However, if you decide to correct the history, you can proceed with updates the same way as for active orders.

If there are no orders listed in the report, your data is clean and you do not have to take any action.

See Appendix: “Understanding Garnishments Changes.”

Running the Garnishment Payee Audit Report

Run the Garnishment Payee Audit Report, PUPYS03.SQR.

This report lists all garnishment orders with a payee that does not exist in the Payee Table.

To run the Garnishment Payee Audit Report:

1. From your web browser, sign in to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Reports.
3. Select the Garnishment Payee Audit Report
4. Click Run.
5. Click the Process Monitor link to monitor the program’s process.

Updating Garnishment Orders

To update an order with the correct payee data:

1. From your web browser, sign in to the Copy of Production database.
2. Select Payroll for North America, Employee Pay Data <country>, Deductions, Create Garnishments where country is, for example, CAN, USA, or USF.
3. Enter the employee ID and the company from the report.
4. Click Search.
5. If there is more than one garnishment order for the same employee, select the row with the garnishment ID from the report.
6. Click the Garnishment Spec Data 2 tab.
7. Update any of the following fields: SetID, VendorID, or Address.
8. Click Save.

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9. Repeat steps 3–8 for each garnishment order you want to update.

Updating Payee Information in the Payee Table

To add payee information to the Payee Table:

1. From your web browser, sign in to the Copy of Production database.
2. Select Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table.
3. Select the Add a New Value tab.
4. Enter the SetID and VendorID from the report.
5. Click Add.
6. Enter all required information for the payee you are setting up.
7. Click Save.
8. Repeat steps 3–7 for each payee you want to add.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 2-7-4: Running the Pending Absence Data Report

This section discusses:

- Understanding the Pending Absence Data Report
- Running the Pending Absence Data Audit Report
- Running Time Administration

Understanding the Pending Absence Data Report

In this step, you run the pending Absence data audit report. This step applies only if you use PeopleSoft Time and Labor and you have North American Payroll Employees. This report runs the SQR PUTLK01.

For information about changes resulting from the integration of PeopleSoft Time and Labor with PeopleSoft Absence Management, see the appendix “Reviewing Time and Labor Integration with Absence.”

Running the Pending Absence Data Audit Report

To run the pending Absence data audit report:

1. From your web browser, sign in to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Reports, Pending Absence Data Report.
3. Click Add a New Value.
4. Enter the run control *UPG_TL_ABSENCE*.
5. Click Run.
6. Click the Process Monitor link to monitor the program’s process.

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If there are any pending absences, you need to run Time Administration. If you see any data in the pending Absence data SQR report, this indicates that there are absences that have been reported and Time Administration has not been run. You need to run Time Administration for the employees and for the dates that show in the report, by following the steps below. Make sure you have access to run Time Administration.

Running Time Administration

To run Time Administration:

1. Select Time and Labor, Process Time, Request Time Administration.
2. Click Add a New Value.
3. Enter the run control *UPG_TL*.
4. Add the employees in the SQR report.
5. Enter the end date.
6. Click Run.
7. Click the Process Monitor link to monitor the program's process.

Once the Time Administration process has run to completion, run the SQR again, following the steps in Running the Pending Absence Data Audit Report above.

If you still see data in the SQR report, you need to run Time Administration again. If you run Time Administration again, you can enter the run control or select *UPG_TL* from the list of run control IDs. Perform as many iterations as needed, until there is no more data in the SQR report.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Time and Labor	All	All

Task 2-7-5: Reviewing Career Planning Mobility

Information about an employee's ability to relocate will now be stored in each employee's Profile Management PERSON profile. In prior releases, there were no limits to the number of preferences or obstacles. In the new release, obstacles to mobility are limited to one and International and U.S. geographic preferences are limited to three. The following query lists any career plans with more than the new limits. Review each of these career plans before beginning the upgrade. The extra data will be deleted during the upgrade. To determine which data is kept, delete the preferences and obstacles that you do not want upgraded. If you do not remove the extra instances, the upgrade will remove the data.

To run the Career Planning Mobility query report:

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

See *PeopleSoft HR 9.1 PeopleBook: Plan Careers and Successions.*

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Properties

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

Task 2-8: Preparing Approvals for Upgrade

This section discusses:

- Understanding Approvals Upgrade
- Upgrading Appraisal Approvals
- Completing eProfile Approvals
- Completing ePerformance Approvals
- Completing Time and Labor Approvals

Understanding Approvals Upgrade

You will have to complete all PeopleSoft ePerformance approval transactions and PeopleSoft eProfile Promotions, transfers, reporting changes, and PeopleSoft Time and Labor approval transactions currently in process before upgrading to the new Approvals Framework.

Task 2-8-1: Upgrading Appraisal Approvals

Appraisals that have been created, but not submitted, and use one of the delivered rule sets for approval will be upgraded to the new Approvals Framework. The upgrade will update these appraisal records, as well as any others that have not been submitted, to use the new framework when submitted for approval.

During the upgrade, the new release approving manager user list will be set to the equivalent old release direct reports access type used for EP_APPRAISAL_ORG. This upgrade will only take place if one of the following access types is configured:

- By SupervisorId
- By Department Manager
- By Reports To Position
- By Part Posn Mgmt Supervisor
- By Part Posn Mgmt Dept Mgr

If you have configured your transaction to use “By Department Security Tree” or “By Group Id,” the approving manager user list will not be updated, since these access types will not be pre-configured for the approval framework.

Transactions that have been created, but not submitted, and use a customized rule set will not be upgraded to the new approval process. You will not be able to submit the appraisal because it will not have an approval process id after the upgrade. To determine which transactions are affected, run the following sql:

```
SELECT * FROM PS_EP_APPR WHERE APPR_RULE_SET NOT IN 'EP_APPRAISAL_ADM', 'EP_⇒
```

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```
APPRAISAL', ' ')  AND EP_APPROVAL_STATUS = 'OPEN'
```

If you have used customized rule sets, you will need to complete the following steps after the upgrade.

1. Review the new Approval Framework definitions for PeopleSoft ePerformance and determine if the custom rule set can be used:
   a. Can you use the delivered approval transaction registry for PeopleSoft ePerformance instead of the customized rule set?
   b. Can you use one of the delivered approval process definitions for PeopleSoft ePerformance instead of the customized rule set?
2. If the answer to *a* is *Yes*, reset your template or document type to use the new delivered approval process definition that you want to use.
3. If the answer to either *a* or *b* is *No*, then you must create the Approval Framework definition to replace the custom rule set. Then reset your template or document type to use the new approval process definition that you created.
4. Once you have completed either step 2 or step 3, you will run the following 2 SQL statements to update table PS_EP_APPR to set the new values for the approval process definition:

```
• UPDATE PS_EP_APPR SET EOAWDEFN_ID = (SELECT EOAWDEFN_ID
  FROM PS_EP_REVW_TYPE_TBL B
  where B.EP_REVIEW_TYPE = PS_EP_APPR.EP_REVIEW_TYPE
  AND B.APPR_RULE_SET = PS_EP_APPR.APPR_RULE_SET
  AND B. EOAWDEFN_ID <> ' ')
  AND EP_APPROVAL_STATUS = 'OPEN'
  AND APPR_RULE_SET NOT IN
  ('EP_APPRAISAL_ADM',
  'EP_APPRAISAL'.
  ' ');
```

```
• UPDATE PS_EP_APPR SET EOAWDEFN_ID = (SELECT EOAWDEFN_ID
  FROM PS_EP_TMPL_DEFN_TBL B
  where B.EP_REVIEW_TYPE = PS_EP_APPR.EP_REVIEW_TYPE
  AND B.APPR_RULE_SET = PS_EP_APPR.APPR_RULE_SET
  AND B. EOAWDEFN_ID <> ' ')
  AND EP_APPROVAL_STATUS = 'OPEN'
  AND APPR_RULE_SET NOT IN
  ('EP_APPRAISAL_ADM',
  'EP_APPRAISAL'.
  ' ');
```

Properties

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

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Task 2-8-2: Completing eProfile Approvals

You need to complete approvals, promotions, transfers, and reporting changes currently in process before upgrading to the new release. In this step, you run a series of queries to determine which transactions need to be completed and then complete them. If you do not complete these transactions, the data cannot be added to the new approval framework.

To run the eProfile Approvals query reports:

1. Select Reporting Tools, Query, Query Manager.
2. Run the following query reports:
   - UPG_EL_PROMOTIONS to determine which promotions need to be completed or cancelled.
   - UPG_EL_TRANSFERS to determine which transfers need to be completed or cancelled.
   - UPG_EL_REPORTINGS to determine which reporting changes need to be completed or cancelled.

See *PeopleSoft Enterprise eProfile 8.9 PeopleBook.*

Properties

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

Task 2-8-3: Completing ePerformance Approvals

You need to complete approvals currently in process before upgrading to the new release. In this step, you run a query to determine which transactions need to be completed and then complete them. If you do not complete these transactions, the data cannot be added to the new approval framework.

To run the ePerformance Approvals query report:

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

   UPG_EP_APPROVALS

See *PeopleSoft Enterprise ePerformance 8.9 PeopleBook.*

Properties

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

Task 2-8-4: Completing Time and Labor Approvals

In the new PeopleSoft release, PeopleSoft Time and Labor adopts the Approval Workflow Engine. The new engine allows you to set up multiple levels of approvals, notifications, and workflows.

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The new system utilizes new architecture. Therefore, *no upgrade is provided*. It is necessary for you to complete any pending transactions in your current workflow system prior to the upgrade. The Approval Workflow Engine is *not* backwards compatible with any other approvals and workflow mechanisms previously delivered.

If you do not resolve pending transactions, the pending rows in the Report and Payable Time will be denied and respectively rejected during data conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Time and Labor	All	All

Task 2-9: Preparing the Benefits Upgrade

This section discusses:

- Preparing Benefits Administration
- Preparing COBRA Administration

Task 2-9-1: Preparing Benefits Administration

This step is performed by the Benefits Administrator. Run this step if you are licensed for PeopleSoft Benefits Administration.

You need to create events for all pending data changes that could affect Benefits eligibility because data conversion cannot convert pending data change "triggers." To create events, perform a single Event Maintenance (EM) run (using any single arbitrary existing EM schedule; the smaller the schedule the less impact this will have on your timeline). Then review all Benefits Administration messages to ensure that all pending activity has been successfully processed to events in at least a "prepared" status. The events do not have to be finalized or closed. After running Event Maintenance, confirm that no more pending changes exist by verifying on the BAS Activity page that the BAS Activity grid is empty.

Properties

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

Task 2-9-2: Preparing COBRA Administration

This step is to be performed by the Benefits Administrator. Run this step if you are using the COBRA Administration module within PeopleSoft Base Benefits.

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You need to create events for all pending data changes that could trigger COBRA qualification because data conversion cannot convert pending data change "triggers." To create events, perform a COBRA process run. Then review all COBRA Administration messages to ensure that all pending activity has been processed to events. The events do not have to be finalized or closed. After running the COBRA process, confirm that no more pending changes exist by verifying that the COBRA Activity grid is empty on the COBRA Activity page.

Properties

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

Task 2-10: Auditing Global Payroll Settings

This section discusses:

- Understanding Global Payroll Settings
- Verifying PIN Element Numbers

Understanding Global Payroll Settings

In this task you verify your PIN Element Numbers.

Note. Complete this task only if you have PeopleSoft Global Payroll installed.

Task 2-10-1: Verifying PIN Element Numbers

PIN (Element) Numbers in the range of 1 to 10000 are reserved for use by the PeopleSoft system. Do not create PINs in this range. An online validation in the Installation table setup component ensures that the Last Used Element Number cannot be set to a value less than 10000. Please verify that you did not create or renumber any elements so that the PIN (Element) Number is less than 10001. If you have, you need to renumber these elements (using the Packager) so that the PIN (Element) Number is greater than 10000.

Note. Your previous PeopleSoft release was shipped with the Last Element Number set to 10000. Any new elements you created would have been assigned a PIN (Element) Number above 10000. In order for you to have created or renumbered any elements where that PIN (Element) Number has a value less than 10000, you would have had to change the field PIN_NUM_LAST on the PS_INSTALLATION table through SQL.

See Also

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Core	All	All

Task 2-11: Making Functional Decisions

This section discusses:

- Understanding Making Functional Decisions
- Assigning Upgrade Default Values
- Defining GP Country Extensions Upgrade Defaults
- Exporting GPCE Upgrade Default Options

Understanding Making Functional Decisions

In this task, you choose the default values that will be assigned to fields by conversion programs during the upgrade.

Task 2-11-1: Assigning Upgrade Default Values

This section discusses:

- Understanding Upgrade Default Values
- Opening the Upgrade Defaults Dialog Box
- Assigning Profile Management Options
- Assigning HR Default Values

Understanding Upgrade Default Values

This upgrade contains many new fields that need default values. In addition, current values will need to be mapped to new values. In this step, you choose your default values that will be assigned to fields by conversion programs during the upgrade. You will also structure some of the mapping to the way in which you will use the system.

Opening the Upgrade Defaults Dialog Box

To open the Upgrade Defaults dialog box:

1. From your web browser, sign in to the Copy of Production database using your current release of PeopleSoft PeopleTools.
2. Select Set Up HRMS, Upgrade, Define Defaults, Product Defaults.

   The Upgrade Defaults dialog box appears.
3. Follow the instructions in the remainder of this task to complete the Upgrade Default pages.

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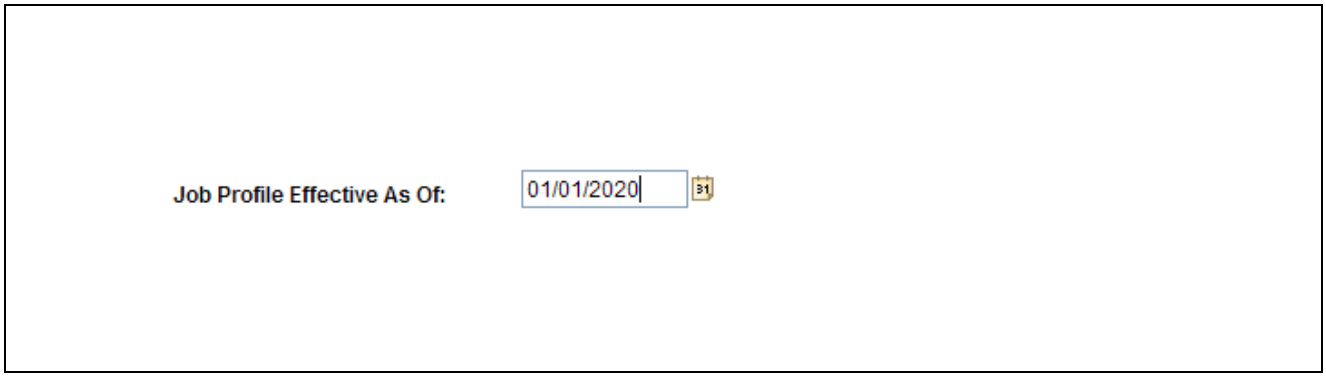
Assigning Profile Management Options

In this step, you determine the default values to be used in data conversion for the PeopleSoft Profile Management upgrade. If no values are supplied, the defaults described below will be applied by the conversion program.

To set Profile Management options:

1. Select the Profile Management tab.

   The Profile Management tab appears, as shown in the following example:



Profile Management Tab

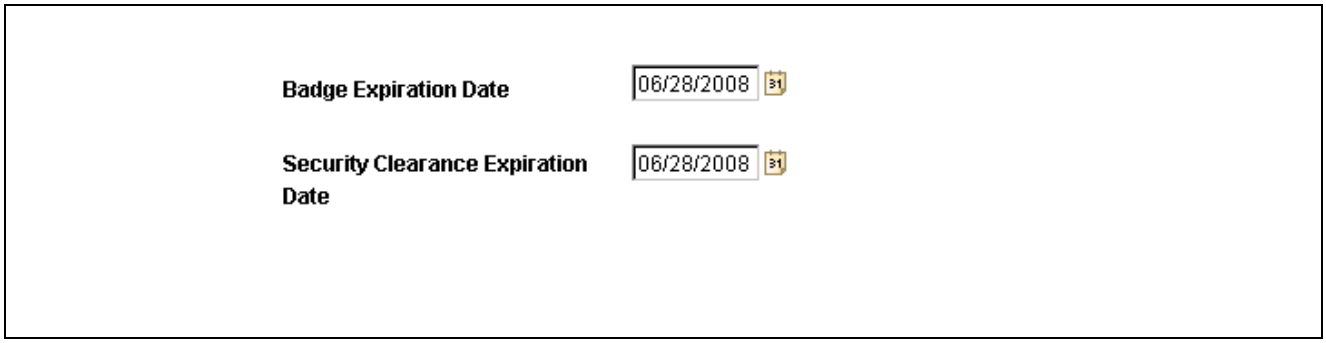
2. Set the Job Profile Description Effective As Of field to the effective date that you want to use.

   In the new release, the Job Profiles description field can have only one effective date per job profile. It will default to the most current effective date for the *As Of* date specified. If no date is less than or equal to the date specified, the profile will not be converted. For this reason, it is recommended that a date of *3000-01-01* be used to ensure that all profiles are converted and that the current effective date for the profile is used.

Assigning HR Default Values

In the new release, the EXPIRATION_DATE field is added to the BADGE_TBL record. The EXPIRATION_DATE field also exists on the new Employee Security Clearance record, HR_EE_SEC_CLR. Application errors may occur when the expiration date is before the effective date. To avoid potential errors, specify values for the Badge Expiration Date and Security Clearance Expiration Date fields on the Define HR Defaults page.

The following is an example of the Define HR Defaults page:



Define HR Defaults page

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Properties

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

Task 2-11-2: Defining GP Country Extensions Upgrade Defaults

This section discusses:

- Defining the Global Payroll Country Extensions PSHOME
- Selecting New Licensed Global Payroll Country Extensions

Defining the Global Payroll Country Extensions PSHOME

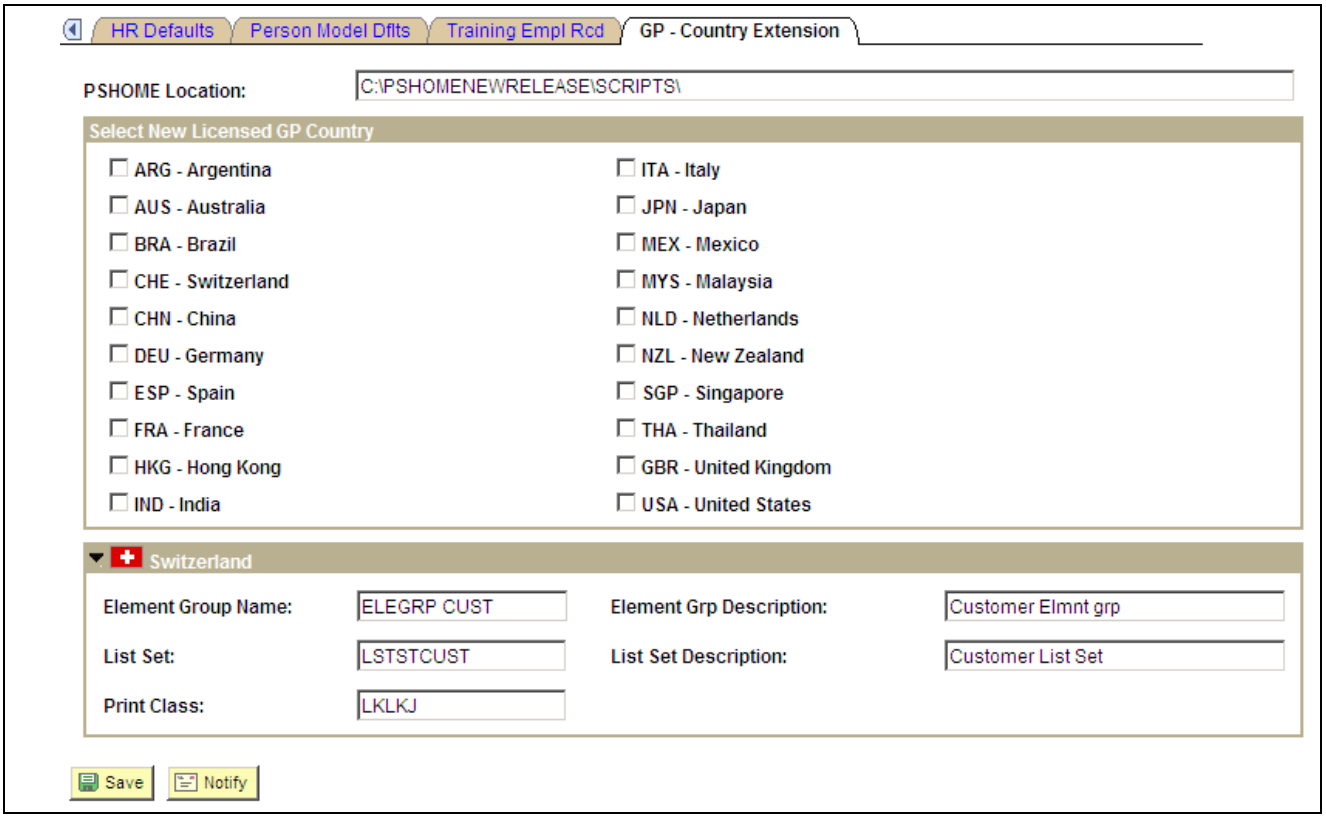
In this step, you define PSHOME for PeopleSoft Global Payroll Country Extensions.

Note. Use the PSHOME in your *NEW* release, not in your old release.

To define PSHOME:

1. Select Set Up HRMS, Upgrade, Define Defaults, Product Defaults, GP - Country Extension.

   The GP - Country Extension page appears, as shown in the following example:



GP - Country Extension page

2. Define the PSHOME in the PSHOME Location field.

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Note. For the PSHOME location, give only the PSHOME location. For example: C:\PSHOME. The "\scripts\" will be appended during the save.

Note. For PeopleSoft Global Payroll customers, the OutputDir value in PSPRCS.CFG of the Source database should be configured to the same value as the InputDir of the Target database.

Selecting New Licensed Global Payroll Country Extensions

In this step, select any additional PeopleSoft Global Payroll Country Extensions that you are licensing in your new PeopleSoft release.

To select the PeopleSoft Global Payroll Country Extensions:

1. Select Set Up HRMS, Upgrade, Define Defaults, Product Defaults, GP - Country Extensions.
2. Select the check box next to the Global Payroll Country Extensions you are licensing in the new release.

   This page does *NOT* indicate the PeopleSoft Global Payroll Country Extensions that you currently have installed. Select *only* the new PeopleSoft Global Payroll Country Extensions that you are licensing in the new release. You *do not* need to select the PeopleSoft Global Payroll Country Extensions that you already license.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 2-11-3: Exporting GPCE Upgrade Default Options

In this step, you export the PeopleSoft Global Payroll Country Extension upgrade default options defined previously for use during Move to Production.

The script name for your upgrade is:

```
PUHCGPP01E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

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Task 2-12: Reviewing Table Row Counts

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

Properties

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

Task 2-13: Preparing Your Database

This section discusses:

- Understanding Database Preparation
- Verifying Database Integrity
- Cleaning the PSOBJCHNG Table
- Purging Message Queues
- Dropping PeopleTools Tables
- Cleaning Up PeopleTools Data
- Dropping Temporary Tablespaces
- Shrinking Images

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 2-13-1: Verifying Database Integrity

Have a database consistency check performed on your Target database to ensure that it is clean and to minimize any potential upgrade errors due to possible database corruption. Work with your database administrator to ensure that the check that is run is similar to the one shown for your database platform in the following table.

This table lists database platforms and commands to run a database consistency check:

Platform	Command
DB2 UNIX/NT	`db2dart`
Informix	`oncheck`
Microsoft SQL Server	`DBCC CHECKDB`

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Platform	Command
Oracle	`dbv`
Sybase	`DBCC CHECKDB`

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT Informix MS SQL Server Oracle Sybase	All

Task 2-13-2: Cleaning the PSOBJCHNG Table

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

```
DELETE FROM PSOBJCHNG
```

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

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

Properties

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

Task 2-13-3: Purging 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.

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

```
APPMSGPURGEALL.DMS
```

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

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Properties

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

Task 2-13-4: Dropping 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:

- PSOPTIONS_TMP
- PSLANGUAGES_TMP
- 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 2-13-5: Cleaning Up PeopleTools Data

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.46 or higher. In this step, you modify or delete PeopleSoft PeopleTools data prior to performing the PeopleSoft PeopleTools upgrade. This is necessary so that tables can be altered and indexes can be created successfully later in the upgrade.

Use the following instructions for your specific PeopleSoft PeopleTools release:

- If you are upgrading from PeopleSoft PeopleTools 8.46, 8.47, 8.48, or 8.49:

  PSLOCALEORDER has three fields defined: ISO_LOCALE, SEQNUM, and ISO_LOCALE_CHILD. This table is used internally by PeopleSoft PeopleTools to prioritize locales when consuming a remote WSRP service description. Priority is defined by the SEQNUM field.

  See the PeopleTools: PeopleTools Portal Technologies PeopleBook, Appendix: “Language Support for Consuming and Producing Remote Portlets.”

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As of PeopleSoft PeopleTools 8.50, a unique index with the keys ISO_LOCALE and SEQNUM will be created for the PSLOCALEORDER table. You need to ensure that PSLOCALEORDER does not contain any duplicates so that the unique index can be created successfully later in the upgrade. To determine whether you have any rows of data that share the same set of values for ISO_LOCALE and SEQNUM, run the following SQL:

```
SELECT ISO_LOCALE, SEQNUM, COUNT(SEQNUM) AS NUMBER_OF_DUPLICATE_ROWS FROM⇒
 PSLOCALEORDER GROUP BY ISO_LOCALE, SEQNUM HAVING COUNT(SEQNUM) > 1;
```

This SQL will return the number of duplicate rows that share the same set of values for ISO_LOCALE and SEQNUM. If any rows are returned, decide which row of data you want to keep and delete the other rows. After deleting the duplicate rows, re-run the above SQL to verify that no further duplicates exist.

Note. You may skip the cleanup of the PSLOCALEORDER table in Move to Production upgrade passes.

- If you are upgrading from PeopleSoft PeopleTools 8.50 or 8.51:

  PSCUBRUNCNTL is the run control table that stores the set of parameters required for running the process to build Essbase cube. The run control table should be keyed by user ID and run control ID.

  See the PeopleTools: PeopleSoft Process Scheduler PeopleBook, Submitting and Scheduling Process Requests, Understanding Run Control IDs.

  Prior to PeopleSoft PeopleTools 8.52, CUB_OUTLINEID, CUB_CONNECTID, ANALYSIS_DB_APP, and ANALYSIS_DB_NAME were incorrectly defined as keys, causing non-unique run control IDs to be created. As of PeopleSoft PeopleTools 8.52, a unique index with the keys OPRID and RUN_CNTL_ID will be created for the PSCUBRUNCNTL table. You need to ensure that PSCUBRUNCNTL does not contain any duplicates so that the unique index can be created successfully later in the upgrade. To determine whether you have any rows of data that share the same set of values for OPRID and RUN_CNTL_ID, run the following SQL:

  ```
  SELECT OPRID, RUN_CNTL_ID, COUNT(RUN_CNTL_ID) AS NUMBER_OF_DUPLICATE_ROWS FROM⇒
   PSCUBRUNCNTL GROUP BY OPRID, RUN_CNTL_ID HAVING COUNT(RUN_CNTL_ID) > 1;
  ```

  This SQL will return the number of duplicate rows that share the same set of values for OPRID and RUN_CNTL_ID. If any rows are returned, decide which row of data you want to keep and delete the other rows. After deleting the duplicate rows, re-run the above SQL to verify that no further duplicates exist.

Properties

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

Task 2-13-6: Dropping Temporary Tablespaces

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.51. In this step, you will drop temporary tablespaces prior to performing the PeopleSoft PeopleTools upgrade.

If you are upgrading from PeopleSoft PeopleTools 8.51, drop the PSTBSPC and PSTBSP32 tablespaces, if they exist, from the PSPTDMO database, or from the database where the PeopleTools tables are stored.

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Properties

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

Task 2-13-7: Shrinking 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 PeopleSoft 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 PeopleSoft Application Designer, insert your images into a project.

   Select Insert, Definitions into Project.

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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 “Applying PeopleTools Changes,” Updating PeopleTools System Tables.

Properties

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

Task 2-14: Renaming Records and Fields

This section discusses:

- Understanding Renaming Records and Fields
- Running the RNHCUPK03 Script
- Running the RNHCUPK01 Script
- Retaining the Target Rename Log Files
- Running RNHCUPK03 Script on Copy of Current Demo
- Running RNHCUPK01 Script on Copy of Current Demo

Understanding Renaming Records and Fields

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

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

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

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

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

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

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

Task 2-14-1: Running the RNHCUPK03 Script

This script contains renames that were introduced during maintenance. Depending on the maintenance applied to your database, the renames may not need to be run. Review each rename in the script. Remove any renames where the old record.field does not exist in your Target database.

This rename should only run during the initial upgrade pass, not during the Move to Production passes.

If you want to automate this step, follow the procedure below:

1. Select the step Running the RNHCUPK03 Script in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

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

Task 2-14-2: Running the RNHCUPK01 Script

This script will rename records, fields, and recfields on the Copy of Production database. These renames should only execute during the initial upgrade pass, not during the Move to Production passes.

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Properties

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

Task 2-14-3: Retaining the Target Rename Log Files

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

Properties

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

Task 2-14-4: Running RNHCUPK03 Script on Copy of Current Demo

This script contains renames that were introduced during maintenance. Depending on the maintenance applied to your database, the renames may not need to be run. Review each rename in the script. Remove any renames where the old record.field does not exist in your Copy of Current Demo database.

This rename should only run during the initial upgrade pass, not during the Move to Production passes.

If you want to automate this step, follow the procedure below:

1. Select the step Running the RNHCUPK03 Script in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

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

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Task 2-14-5: Running RNHCUPK01 Script on Copy of Current Demo

The RNHCUPK01.DMS script will rename records, fields, and recfields on the Copy of Current Demo database. These renames should only execute during the initial upgrade pass, not the Move to Production passes. Run this script in PeopleSoft Data Mover user mode.

Properties

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

Task 2-15: Comparing Customizations

This section discusses:

- Running the UPGCUST Compare
- Running the UPGCUST Filter Script
- Reviewing the UPGCUST Compare Log
- Restoring the Copy of Current Demo

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

Task 2-15-1: Running the UPGCUST Compare

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

- Feed categories
- Feed data types
- Feed definitions
- File reference type codes
- IB queues
- Java portlet user preferences
- Message catalog entries
- Messages
- Message schemas

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- Portal registry user favorites
- Portal registry user home pages
- Related content layouts
- Related content services
- Related content service configurations
- Related content service definitions
- Service operation routings
- Service operations
- Service operations handlers
- Service operation versions
- Services
- WSDL

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

PeopleSoft Global Payroll Australia customers who have upgraded from PeopleSoft Human Resource Management System 7.5 using either "Human Resource Management System 7.5 to 8.8 SP1 Upgrade" or "PeopleSoft Enterprise HRMS and Student Administration Australia 7.6 to HRMS and Campus Solutions 8.9 MP1 Upgrade," and who are now upgrading to PeopleSoft HRMS 9.1, need to read the appendix "Reviewing Global Payroll Australia Historical Data".

See Appendix: "Reviewing Global Payroll Australia Historical Data."

Properties

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

Task 2-15-2: Running the UPGCUST Filter Script

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

The script name for your upgrade is:

```
PUUPX99.DMS
```

See Appendix: "Using the Comparison Process."

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Properties

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

Task 2-15-3: Reviewing the UPGCUST Compare Log

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

Properties

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

Task 2-15-4: Restoring the Copy of Current Demo

Restore your Copy of Current Demo database from the backup made earlier in the upgrade. The backup was made before rename scripts ran against the Copy of Current Demo. This is done to restore the environment to an Oracle-delivered demo implementation. If no rename scripts were run against the Copy of Current Demo, then skip this step since no changes were made to the database.

Properties

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

Task 2-16: Preparing for the Application Upgrade

This section discusses:

- Creating a Copy of Translate Values
- Creating a Copy of RecField Definitions
- Loading the Alter Analyzer Data
- Deleting Old Pagelet Wizard Data

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Task 2-16-1: Creating a Copy of Translate Values

This script creates a temporary table PS_UPG_XLAT_TMP containing translation values from the PSXLATITEM for the field values that will be used during the data conversion.

The script name for your path is:

```
PUHCHRS10.DMS
```

Properties

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

Task 2-16-2: Creating a Copy of RecField Definitions

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

```
PUUPX07.DMS
```

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

Properties

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

Task 2-16-3: Loading the Alter Analyzer Data

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. In this step, you run the PTALTDATLOAD Application Engine program for the Move to Production pass. This process preserves the database structure from your current release into temporary tables to be used later in the upgrade.

Properties

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

Task 2-16-4: Deleting Old Pagelet Wizard Data

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

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

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

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

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

```
PTPPB_EOPPB.DMS
```

To run the step automatically:

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

Properties

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

Task 2-17: Backing Up After Preparing Your Database

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

Properties

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

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CHAPTER 3

Applying PeopleTools Changes

This chapter discusses:

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

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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 3-1: Verifying the Upgrade User

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

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

The following two conditions must be satisfied for the Upgrade User to access tools like Application Designer and Data Mover.

1. Verify that at least one of the Permission Lists the Upgrade User is tied to also exists in the New Release Demo database.
   a. Run the following query on your Target database to determine the Permission Lists tied to the Upgrade user:

```
SELECT DISTINCT A.CLASSID FROM PSROLECLASS A, PSROLEUSER B, PSOPRDEFN C
WHERE A.ROLENAME = B.ROLENAME
AND B.ROLEUSER = C.OPRID
AND C.OPRID = 'Upgrade User'
```

   b. Run the following query on the New Release database for the list of Permission Lists defined in it:

```
SELECT DISTINCT CLASSID FROM PSCLASSDEFN
```

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c. Verify that at least one of the values returned by the first query is present in the list returned by the second query.

2. This Permission List should have access enabled to tools like Application Designer and Data Mover in the New Release Demo database. To verify this:

   a. Log in to the New Release Demo database's PIA.

   b. Select PeopleTools, Security, Permissions & Roles, Permission Lists.

   c. Enter the above Permission Lists name in the search box and click Search.

   d. Select the PeopleTools tab.

   e. Check the Application Designer Access and Data Mover Access check boxes if not already checked.

   f. Click Save.

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

Properties

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

Task 3-2: Performing Script Modifications

This section discusses:

- Understanding Script Modifications
- Updating the Configuration Manager Profile
- Running a DBTSFIX Report
- Editing the DBTSFIX Output Scripts
- Editing the GRANT Script
- Editing the PTxxxTLS Scripts
- Editing the DB2 Scripts
- Editing Move to Production Import Scripts
- Editing the Move to Production Password
- Editing the DDL Parameters
- Preparing for the Integration Broker Conversion
- Preparing for a PeopleTools Patch
- Editing Application Tablespace Step Properties
- Editing Multilingual Step Properties
- Editing Data Type Steps

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Understanding Script Modifications

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

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

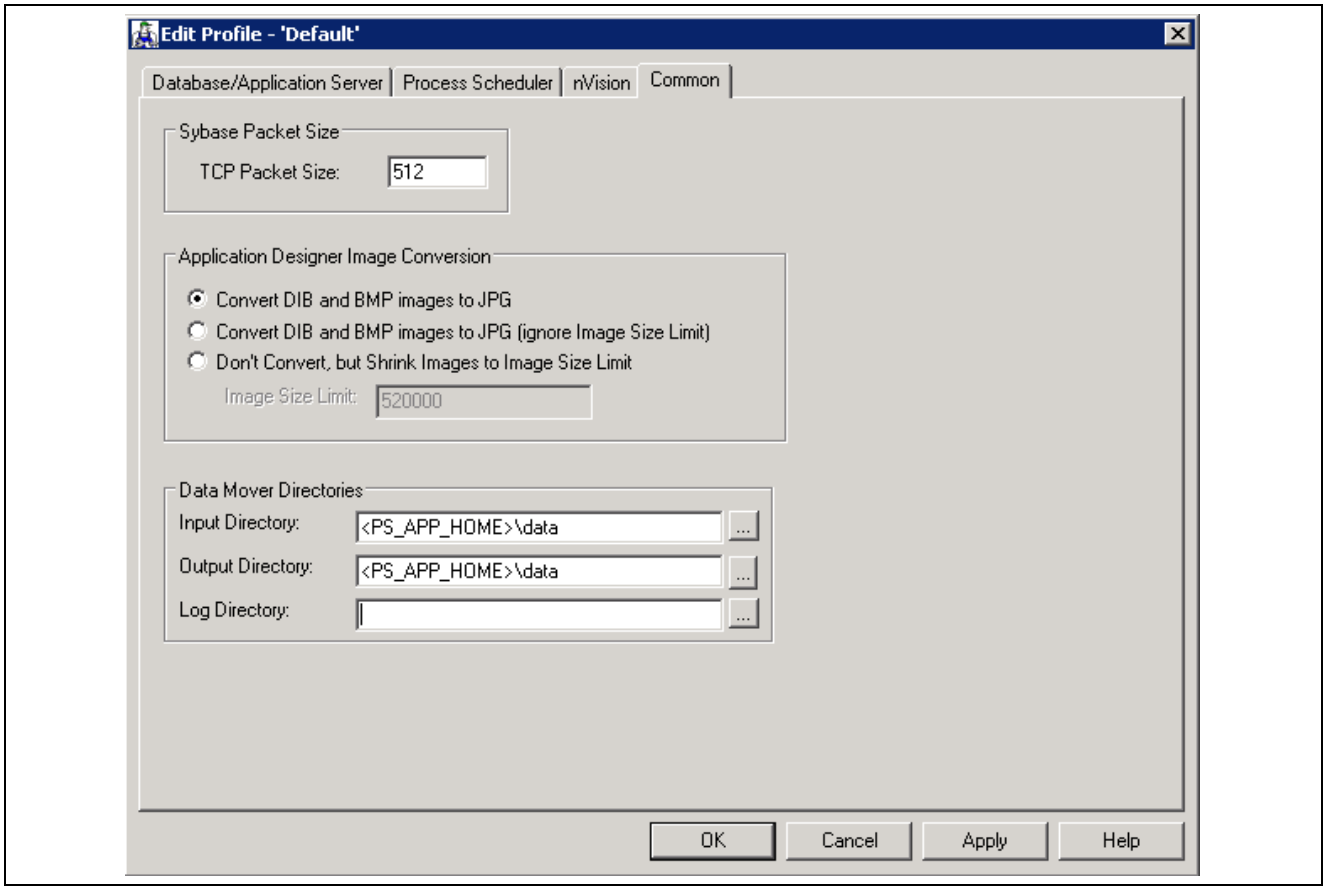
Task 3-2-1: Updating the Configuration Manager Profile

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

To update the profile:

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

   The following is an example of the Common tab.



Edit Profile - Default dialog box: Common tab

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Note. As illustrated in the example above, the Input Directory must be *PS_APP_HOME*\data\, substituting *PS_APP_HOME* with your directory. The Output Directory must be the same.

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

Properties

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

Task 3-2-2: Running 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 REL*xxx*DBTSFIX.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 REL*xxx*DBTSFIX.SQL script in which *xxx* represents a release number (for example, 800, 810, 811, 812, and so on) associated with your particular path.

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 3-2-3: Editing the DBTSFIX Output Scripts

Edit the generated REL*xxx*DBTSFIX 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 PeopleSoft 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.

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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 3-2-4: Editing 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 3-2-5: Editing the PTxxxTLS Scripts

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

To edit the PT*xxx*TLS scripts:

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

   PT*xxx*TLS.DMS
   PT*xxx*TLS*yyy*.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';
   ```


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Properties

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

Task 3-2-6: Editing the DB2 Scripts

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

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

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

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

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

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

```
DB2TMPIDXCREATE.SQL
MSGTLSUPG.DMS
PSLANGUAGES.DMS
pt_languagedata.dms
pt_licensecode.dms
PT_RELEASE_IMPORT.DMS
tlsupgnoncomp.dms
DB2ALLCCSIDUPD.SQL
DLHCUPS04I.DMS
```

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

In chapter 5, “Applying Application Changes,” set the step Re-Creating Upgrade Tables (in the task Modifying the Database Structure) as a manual stop and edit the UPGCONVERT_CRTTBL.SQL script.

Properties

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

Task 3-2-7: Editing Move to Production Import Scripts

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

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

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

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

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

```
MVAPPIMP.DMS
MVPRDIMP.DMS
MVHCPYS05I.DMS
```

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

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

See "Applying Changes to the Production Database," Performing the Move to Production.

Properties

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

Task 3-2-8: Editing the Move to Production Password

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

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

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


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Properties

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

Task 3-2-9: Editing the DDL Parameters

Edit the *PS_HOME*\SCRIPTS\DDL*xxx*.DMS script for your database platform, as specified in the table below:

Script	Platform
DDLDB2.DMS	DB2 z/OS
DDLDBX.DMS	DB2 UNIX/NT
DDLINF.DMS	Informix
DDLORA.DMS	Oracle

At the bottom of this script, there will be 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 in this script.

Properties

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

Task 3-2-10: Preparing for the Integration Broker Conversion

This section discusses:

- Understanding Integration Broker Conversion
- Editing PTIBUPGRADE.DMS
- Editing PTUPGIBDEL.SQL
- Editing the Change Assistant Template

Understanding Integration Broker Conversion

In this step, you edit various Integration Broker scripts that are run during the upgrade. You also need to modify PeopleSoft Change Assistant step properties with an updated script name so that the upgrade does not error out on an incorrect script name.

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PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier. You must perform this step if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier.

Editing PTIBUPGRADE.DMS

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.

Editing PTUPGIBDEL.SQL

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 modify it as follows.

To modify the PTUPGIBDEL.SQL script:

1. Search for the string `?--- End of PT8.`*xx* `---?` in which *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading.
2. Delete the entire portion of the script below this string.
3. Save the script as *PS_HOME*\SCRIPTS\PTUPGIBDEL8*xx*.SQL in which *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading, 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.

Editing the Change Assistant Template

Follow this procedure to edit your PeopleSoft Change Assistant template so that the correct script is run.

To edit the template:

1. In PeopleSoft Change Assistant, in the task Performing Updates to PeopleTools System Tables, right-click the step Cleaning Up Message Data, and then select Step Properties.
2. Change the Script/Procedure value from *PTUPGIBDEL8xx* to the specific name that you used in step 3 of the procedure Editing PTUPGIBDEL.SQL, without the .SQL extension.
3. Click OK.

Properties

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

Task 3-2-11: Preparing for a PeopleTools Patch

This section discusses:

- Understanding Preparing for a PeopleTools Patch
- Upgrading Without a PeopleTools Patch
- Upgrading With a PeopleTools Patch

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Understanding Preparing for a PeopleTools Patch

You may be upgrading using a patched PeopleSoft PeopleTools release. In this step, you modify your PeopleSoft Change Assistant upgrade job depending on whether you are applying a PeopleSoft PeopleTools patch or not. Follow the instructions in the appropriate section below.

Upgrading Without a PeopleTools Patch

If you are *not* applying a PeopleSoft PeopleTools patch as part of the upgrade process, mark the following steps as complete in your upgrade job in PeopleSoft Change Assistant. These steps are not applicable when upgrading to an unpatched version of PeopleSoft PeopleTools:

- "Applying PeopleTools Changes," Performing Updates to PeopleTools System Tables, Updating PeopleTools Patch Information
- "Applying PeopleTools Changes," Copying Projects, Copying the PATCH85X Project
- "Applying PeopleTools Changes," Copying Projects, Copying the PATCH85XML Project

To set the patch steps as complete:

1. In PeopleSoft Change Assistant, select the step.
2. Select Edit, Complete, or press F7.

Upgrading With a PeopleTools Patch

If you are applying a PeopleSoft PeopleTools patch as part of the upgrade process, review the patch documentation and perform any additional database upgrade instructions, other than running PTPATCH.DMS, that may be listed prior to the copy of the patch project. Do not run PTPATCH.DMS at this time, as PTPATCH.DMS will be run later in the upgrade.

Additionally, verify whether a database project was delivered with the patch. Perform the following steps only if you are applying a PeopleSoft PeopleTools patch that includes a database project.

To prepare for applying a PeopleSoft PeopleTools patch:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Copying Projects, right-click the step Copying the PATCH85X Project, and then select Step Properties.
3. In the Step Properties dialog box, change the #PROJECT value in the Parameters field from *PATCH85X* to the actual name of the PeopleTools patch project (e.g., PATCH850).

   85*X* represents the PeopleSoft PeopleTools release of the patch project, which should correspond to the PeopleSoft PeopleTools release to which you are upgrading.
4. Click OK.
5. If you license multiple languages and translatable changes were delivered in the patch, perform the following steps:

   a. In the task Copying Projects, right-click the step Copying the PATCH85XML Project, and then select Step Properties.

   b. In the Step Properties dialog box, change the #PROJECT value in the Parameters field from *PATCH85XML* to the actual name of the PeopleTools patch project (e.g., *PATCH850ML*).

      85*X* represents the PeopleSoft PeopleTools release of the patch project, which should correspond to the PeopleSoft PeopleTools release to which you are upgrading.

   c. Click the Upgrade button, and then click the Options button.

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d. On the Copy Options tab, deselect any languages that you do not license.

Common and English should remain deselected.

e. Click OK three times.

Properties

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

Task 3-2-12: Editing Application Tablespace Step Properties

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

See "Applying Application Changes," Updating Database Overrides, Creating New Tablespaces.

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

- `HCDDL.SQL` for Oracle or DB2 z/OS ANSI
- `HCDDLU.SQL` for DB2 z/OS Unicode
- `HCDDLDMS.SQL` for DB2 UNIX/NT ANSI
- `HCDDLDMSU.SQL` for DB2 UNIX/NT Unicode

Once you have determined which script to run during Move to Production, modify your upgrade job with the correct script name.

To update the step Creating Application Tablespaces with the correct script name:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Populating Tablespace Data, right-click the step Creating Application Tablespaces and then select Step Properties.
3. In the Script/Procedure field, change *xxDDL* to the name of the script that you want to run and click OK.
4. Select File, Save.

Properties

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

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Task 3-2-13: Editing Multilingual Step Properties

In this step, you edit the PeopleSoft Change Assistant step properties for the multilingual PeopleSoft PeopleTools project copy step (or steps). Copy only the translated objects for the languages that 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, Bulgarian, Croatian, Czech, Danish, Finnish, French, Greek, Hebrew, Hungarian, Malay, Norwegian, Polish, Romanian, Russian, Serbian, Slovak, Slovenian, Turkish, or UK English—perform the following instructions for the step "Copying the PPLTLSML Project." If you license any of these languages—Canadian French, Dutch, German, Italian, Japanese, Korean, Portuguese, Simplified Chinese, Spanish, Swedish, Traditional Chinese, or Thai—perform the following instructions for the step "Copying the PPLTLS84CURML Project."

To edit multilingual step properties:

1. In PeopleSoft 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 PeopleSoft Change Assistant.

See Copying the PPLTLS84CURML Project.

See Copying the PPLTLSML Project.

Properties

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

Task 3-2-14: Editing Data Type Steps

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

To set the Data Conversion steps as complete:

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

See Converting Database Data Types.

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Properties

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

Task 3-3: Performing Updates to PeopleTools System Tables

This section discusses:

- Understanding Updating PeopleTools System Tables
- Cleaning Up Message Data
- Updating System Catalog Views
- Updating PeopleTools System Tables
- Granting Privileges to the CONNECT ID
- Exporting Installation Data
- Updating the Product License Code
- Updating the Database for Timestamp
- Updating PeopleTools Patch Information
- Creating Temporary Performance Indexes
- Exporting PeopleTools System Tables
- Importing PeopleTools System Tables
- Resetting the Database Options Flag
- Rerunning Update Statistics for DB2 zOS
- Rerunning the RUNSTATS Report for DB2 UNIX NT
- Rerunning Update Statistics for DB2 UNIX NT
- Rerunning Update Statistics for Informix
- Rerunning Update Statistics for Oracle
- Saving Transparent Data Encryption Information

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 on your Copy of Production database, unless otherwise indicated.

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Task 3-3-1: Cleaning Up Message Data

This step runs PTUPGIBDEL8*xx*.SQL, where *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading. Message functionality and structure changed as of PeopleSoft PeopleTools 8.48, and the old data is obsolete.

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier. You must perform this step to clean out obsolete message data if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier.

Properties

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

Task 3-3-2: Updating System Catalog Views

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

Properties

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

Task 3-3-3: Updating 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, REL*xxx*.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. PeopleSoft Change Assistant determines which REL*xxx* scripts to run based on the PeopleSoft PeopleTools release of your Source and Target databases.

If you created `REL`*xxx*`DBTSFIX` (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 `REL`*xxx*`DBTSFIX`. If you did not run `DBTSFIX`, PeopleSoft Change Assistant will run `REL`*xxx*.

Note. Before running this step, verify that the *PS_HOME* values are set correctly in the PeopleSoft 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 PeopleTools: Change Assistant PeopleBook for your new release.

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Properties

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

Task 3-3-4: Granting 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-in.

Properties

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

Task 3-3-5: Exporting Installation Data

This step runs PT_INSTALLDATA.DMS, which exports data that was loaded into the New Release Demo during installation.

Properties

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

Task 3-3-6: Updating the Product License Code

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

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

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

```
PS_HOME\SCRIPTS\DBnameDBplatform.DMS
```

DBname is the name of the Demo database that you installed and *DBplatform* represents the code used for the database platform, as shown in the following table:

Database Platform	Code Used
Microsoft SQL Server	MSS
DB2 UDB z/OS	DB2
DB2 UDB UNIX/NT	DBX

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Database Platform	Code Used
Oracle	ORA
Informix	INF
Sybase	SYB

This step runs PT_LICENSECODE.DMS, which updates your upgrade database with the same license code and license group that was used to install the New Release Demo database. You will be able to access the pages and Application Engine programs that you licensed after running the script.

Properties

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

Task 3-3-7: Updating the Database for Timestamp

This step runs *PS_HOME*/scripts/UPGDBOPTIONS_ENABLETIMESTAMP.SQL. This script updates the database to indicate that the new TIMESTAMP data types are now enabled. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

Properties

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

Task 3-3-8: Updating PeopleTools Patch Information

This step runs PTPATCH.DMS, which updates 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.

Properties

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

Task 3-3-9: Creating Temporary Performance Indexes

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

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Properties

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

Task 3-3-10: Exporting PeopleTools System Tables

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

The script name for your upgrade path is:

```
MVPRDEXP.DMS
```

Properties

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

Task 3-3-11: Importing PeopleTools System Tables

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

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

- Copying Projects
- Renaming Records and Fields
- Running Upgrade Compare Reports
- Running Project Compare Reports
- Running the Upgrade Copy

If your RDBMS uses tablespaces, edit this script for the proper DDL information.

The script name for your upgrade path is:

```
MVPRDIMP.DMS
```


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Properties

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

Task 3-3-12: Resetting the Database Options Flag

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

Properties

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

Task 3-3-13: Rerunning 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-3-14: Rerunning the 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

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Properties

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

Task 3-3-15: Rerunning 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-3-16: Rerunning 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-3-17: Rerunning 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.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

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Properties

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

Task 3-3-18: Saving Transparent Data Encryption Information

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. If you have defined encrypted fields within PeopleSoft PeopleTools for Oracle's Transparent Data Encryption (TDE) feature, note that all metadata field definitions are delivered from PeopleSoft applications without any encryption attributes enabled. PeopleSoft applications will not deliver any metadata indicating that encryption is enabled for any field for an initial installation database file, project, or a PeopleSoft PeopleTools or PeopleSoft application patch. If you customize any fields by adding TDE encryption, you will need to keep track of the fields and their associated record definitions and ensure that you maintain the desired encryption status throughout any upgrades that you perform.

If you have TDE enabled, run *PS_HOME*\scripts\preupgtdeprocess.sql. This script clears the TDE encryption algorithm currently defined in the PeopleSoft metadata. The script also creates two projects, ENCRYPTEDFLDSB and ENCRYPTEDTBLSB. The project ENCRYPTEDFLDSB contains fields that currently have distinct encrypted columns and the project ENCRYPTEDTBLSB contains recfields that currently have distinct encrypted columns, as indicated in the Oracle database catalog.

You will need the information in the projects and the log file that results from running this script in order to reimplement TDE after the upgrade.

See "Completing Database Changes," Enabling Oracle Transparent Data Encryption.

Properties

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

Task 3-4: Turning Off Change Control

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

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

See "Completing Database Changes," Reviewing Change Control.

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Properties

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

Task 3-5: Loading Model Definition Data

This section discusses:

- Understanding Loading Model Definition Data
- Loading Model Definitions for DB2 zOS
- Loading Model Definitions for DB2 UNIX NT
- Loading Model Definitions for Oracle
- Loading Model Definitions for Informix
- Loading Model Definitions for Microsoft
- Loading Model Definitions for Sybase

Understanding Loading Model Definition Data

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 3-5-1: Loading Model Definitions for DB2 zOS

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 3-5-2: Loading 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.

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Properties

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

Task 3-5-3: Loading 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 3-5-4: Loading 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 3-5-5: Loading 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 3-5-6: Loading 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

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Task 3-6: Loading Message Data

This step runs the MSGTLSUPG.DMS script, which loads system messages in the message catalog.

Properties

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

Task 3-7: Reviewing PeopleTools Objects

Run this task to identify any PeopleSoft PeopleTools objects that you have customized. This task only identifies the customized PeopleSoft 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.

To review PeopleSoft PeopleTools objects:

1. Open the PPLTLS84CUR project on your Target database.
   a. Launch PeopleSoft Application Designer and sign in to the Target database.
   b. Select Tools, Compare and Report..., From File...
   c. Navigate to *PS_HOME*\projects and select the PPLTLS84CUR project.

   Note. It is OK to have the project definition overwritten by the project that is being copied from file.
2. Verify that all object types are selected.
3. Select Options.
4. Select a value for Target Orientation.
5. For Comparison, use one of these options:
   - For Comparison by Release, select the highest release in the list.
   - For Compare by Date, select a date.
6. Under Compare Languages, select Common and English.
7. If you have non-English languages loaded, select the other languages that are loaded into your database.

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8. On the Report Options tab, deselect the Generate Output to Tables check box.
9. On the Report Filter tab, click Default.

   This will cause only customizations to appear on the compare reports.
10. Click OK.
11. Click Compare to start the compare process.
12. Evaluate the compare reports to identify whether the delivered objects conflict with any of your customizations.

    Note. To preserve the PPLTLS84CUR compare reports, you must perform one of the following actions: rename the reports, move the reports to a different folder, or reset the Compare Report Output Directory.

    To reset the Compare Report Output Directory, in PeopleSoft Application Designer, select Tools, Options. On the General tab, change the path specified for the Report Output Directory.

    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	Initial	All	All	All

Task 3-8: Copying Projects

This section discusses:

- Understanding Copying Projects
- Copying the PPLTLS84CUR Project
- Copying the PPLTLS84CURML Project
- Copying the PPLTLSML Project
- Copying the PPLTLS84CURDEL Project
- Copying the PATCH85X Project
- Copying the PATCH85XML Project

Understanding Copying Projects

In this task, you copy projects. The copy process overwrites all customizations, which can include configuration settings stored on the PeopleSoft PeopleTools objects.

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Oracle recommends that you verify the results of all copied projects. After a project has been copied, each object is identified with a check mark in the Done column. You can view these results from the Upgrade tab in PeopleSoft 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 PeopleTools: PeopleSoft Application Designer Developer's Guide PeopleBook for your new release.

Task 3-8-1: Copying the 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	Initial	All	All	All

Task 3-8-2: Copying the 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.

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Properties

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

Task 3-8-3: Copying the 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.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	Arabic Bulgarian Croatian Czech Danish Finnish French Greek Hebrew Hungarian Malay Norwegian Polish Romanian Russian Serbian Slovak Slovenian Turkish UK English

Task 3-8-4: Copying the PPLTLS84CURDEL Project

This process deletes specified PeopleSoft PeopleTools objects from your database.

The copy process detects whether any deleted fields are in use on other objects, such as records. You may see the following kind of warning during the copy:

```
Field FIELDNAME is in use on at least one record.
```

You must clean up any objects that reference deleted fields after the upgrade. When the PeopleSoft PeopleTools upgrade process deletes a field, it no longer exists in the new release, but you may still have objects that reference the deleted field. After fixing any objects that reference the field, delete the field from your system.

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Properties

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

Task 3-8-5: Copying the PATCH85X Project

This process copies specified objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PATCH85X project contains all PeopleSoft PeopleTools objects that have been updated in the patch. Earlier in the upgrade, you modified the step properties of this step with the appropriate patch project name.

See “Applying PeopleTools Changes,” Performing Script Modifications, Preparing for a PeopleTools Patch.

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.

Properties

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

Task 3-8-6: Copying the PATCH85XML Project

This process copies language-specific PeopleSoft PeopleTools objects to your database that are necessary for the proper operation of PeopleSoft PeopleTools. The PATCH85XML project contains all translatable PeopleSoft PeopleTools objects that have been updated in the patch. Earlier in the upgrade, you modified the step properties of this step with the appropriate patch project name and the appropriate languages.

See “Applying PeopleTools Changes,” Performing Script Modifications, Preparing for a PeopleTools Patch.

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.

Properties

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

Task 3-9: Populating Tablespace Data

This section discusses:

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- Creating Application Tablespaces
- Creating Application Tablespaces for Informix
- Populating Updated Tablespace Data
- Updating Tablespace Names

Task 3-9-1: Creating Application Tablespaces

This step creates any new tablespaces needed for the upgrade. Earlier in the upgrade, you modified the step properties of this step with the appropriate script name.

See "Applying PeopleTools Changes," Performing Script Modifications, Editing Application Tablespace Step Properties.

Properties

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

Task 3-9-2: Creating Application Tablespaces for Informix

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

See ”Applying Application Changes,” Updating Database Overrides, Creating New Tablespaces.

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

```
HCDDL.SH
```

FTP the script to the server. Sign in as the database owner (Informix user) and run the script to create the new tablespaces.

Properties

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

Task 3-9-3: Populating Updated 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 delivered names, this step makes those same changes in the PeopleSoft record definition.

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

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-9-4: Updating Tablespace Names

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

- Generate the alter/create scripts and globally edit the scripts, changing the database/tablespace values to those of your Copy of Production database.
- 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 delivered tablespaces, you can omit the references to DDLSPACENAME in the SQL statement above.

Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

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Properties

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

Task 3-10: Building the Updated PeopleTools Project

This section discusses:

- Generating the Updated PeopleTools Script
- Editing the Updated PeopleTools Script
- Running the Updated PeopleTools Script

Task 3-10-1: Generating the 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 3-10-2: Editing 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 PeopleSoft Change Assistant output directory for this upgrade path.

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Properties

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

Task 3-10-3: Running 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 3-11: Migrating Records to New Tablespaces

This section discusses:

- Understanding Record Migration to New Tablespaces
- Copying the PT84TBLSPC Project
- Building the Tablespace Alter Script
- Editing the Tablespace Alter Script
- Running the Tablespace Alter Script

Understanding Record Migration to New Tablespaces

In this task you migrate the tables delivered in the PT84TBLSPC project to the correct tablespaces. Prior to starting this task, you may find it useful to compare the PT84TBLSPC project to find out which tables were assigned to a different tablespace in the new release.

Task 3-11-1: Copying 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.

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Note. For Oracle platforms, PeopleSoft PeopleTools uses the storage parameters and tablespace information from the database catalog instead of PSRECTBLSPC when generating a script from building a project. Contact your database administrator to manually migrate a table to a different tablespace.

Properties

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

Task 3-11-2: Building 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:

```
TABLESPACEALTERTABLES.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 Informix	All

Task 3-11-3: Editing the Tablespace Alter Script

In this step, you edit the TABLESPACEALTERTABLES.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 PeopleSoft 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.

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Properties

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

Task 3-11-4: Running the Tablespace Alter Script

This step runs the TABLESPACEALTERTABLES.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 Informix	All

Task 3-12: Loading Base Data

These PeopleSoft 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 PT*xxx*TLS.DMS and PT*xxx*TLS*yyy*.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, PeopleSoft 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 3-13: Loading Language Data

This section discusses:

- Populating the Language Table
- Loading the Language Data

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Task 3-13-1: Populating the Language Table

This step runs the PSLANGUAGES.DMS script. This script populates the PSLANGUAGES table with Verity Locale data and other language-specific data.

Properties

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

Task 3-13-2: Loading the Language Data

This step runs pt_languagedata.dms, which updates your upgrade database with the list of installed languages from the New Release Demo database. The PeopleSoft Data Mover import script used to create the New Release Demo database contained an update statement similar to the following:

```
UPDATE PSLANGUAGES SET INSTALLED=1 WHERE LANGUAGE_CD = 'xxx';
```

Properties

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

Task 3-14: Loading PeopleTools Data

This section discusses:

- Loading Noncomparable Objects
- Loading English Messages
- Loading English String Data
- Loading Stored Statements Data

Task 3-14-1: Loading 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.

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Properties

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

Task 3-14-2: Loading English Messages

This step runs the MSGTLENG.DMS script, which loads English messages into your database.

Properties

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

Task 3-14-3: Loading English String Data

This step runs the PTSTRENG.DMS script, which loads English string data into the STRINGS_TBL table.

Note. The non-English language data was loaded in the task Loading Base Data.

Properties

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

Task 3-14-4: Loading 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

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Task 3-15: Loading PeopleTools Definition Group

This task runs the PTDEFNSEC.DMS script that loads the PeopleTools definition security group. This ensures that the definition security group is updated with the PeopleTools objects introduced in this release.

Properties

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

Task 3-16: Converting PeopleTools Objects

This section discusses:

- Updating the REN Server Configuration
- Populating MCF Data
- Converting Portal Objects
- Converting Query Prompt Headings
- Encrypting Connector Passwords
- Loading Conversion Data
- Reporting Conversion Details
- Running PeopleTools Data Conversion

Task 3-16-1: Updating the 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. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.42 or earlier.

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*/APPSERV/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.

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Properties

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

Task 3-16-2: Populating 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. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

Properties

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

Task 3-16-3: Converting 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. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

There may be 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).`

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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 PeopleTools: PeopleTools Portal Technologies PeopleBook for your new release.

Properties

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

Task 3-16-4: Converting 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 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. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

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 PeopleTools: PeopleSoft Query PeopleBook for your new release.

Properties

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

Task 3-16-5: Encrypting Connector Passwords

This step runs the Application Engine program UPGRDPASSWDS, which encrypts the password property field for the POP3Target, FTPTarget, GetMailTarget, and JMSTarget connectors. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

Properties

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

Task 3-16-6: Loading Conversion Data

This step runs the PTUPGCONV.DMS script, which imports PeopleSoft PeopleTools data conversion Application Engine driver data into your database.

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Properties

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

Task 3-16-7: Reporting Conversion Details

This step runs the PTUCONV.SQR script. It details which sections will be called by the Upgrade Driver program and what they are doing. Each of the upgrade data conversion sections contains comments that describe the processing done by the section. The information contained in the report is used to evaluate the conversions run in the next step and any actions that are required as a result of the conversion.

Properties

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

Task 3-16-8: Running PeopleTools Data Conversion

The 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 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 3-17: Creating PeopleTools Views

This section discusses:

- Creating Updated PeopleTools Views

Task 3-17-1: Creating Updated PeopleTools Views

This step creates all views defined in the PPLTLS84CUR project. These are PeopleTools views that have changed and are required for tasks later in the upgrade.

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Note. If you are performing an application-only upgrade, this step does not run in the initial pass of the upgrade; it only runs during the MTP pass(es).

Properties

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

Task 3-18: Converting Integration Broker

This section discusses:

- Understanding Converting Integration Broker
- Updating Integration Broker Defaults
- Creating Integration Broker Objects
- Saving Application Messaging Objects
- Exporting Node Transactions
- Preparing Integration Broker Deletes
- Deleting Application Messaging Objects
- Deleting Node Transactions

Understanding Converting Integration Broker

PeopleSoft Change Assistant will display and run the steps in this task only if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier.

Task 3-18-1: Updating Integration Broker Defaults

This step runs the PTIBUPGRADE.DMS script. This script populates the default values specified earlier in the upgrade.

Properties

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

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Task 3-18-2: 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	Initial	All	All	All

Task 3-18-3: Saving Application Messaging Objects

This step copies the PTUPGIBCLONE project to the *PS_HOME*\projects directory. This project was created by the UPGPT848IBUG Application Engine program and contains objects that were successfully converted. The objects are copied to file as a precautionary measure 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	Initial	All	All	All

Task 3-18-4: 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 PeopleSoft Data Mover output directory defined in PeopleSoft Configuration Manager, which should be your *PS_HOME*\data directory.

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

Properties

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

Task 3-18-5: Preparing Integration Broker Deletes

This step copies the PTUPGIBDELETE project to your *PS_HOME*\projects directory in preparation for deleting the obsolete pre-conversion object definitions from the upgrade database. This project was created by the UPGPT848IBUG Application Engine program and contains the same objects as PTUPGIBCLONE.

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Properties

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

Task 3-18-6: Deleting Application Messaging Objects

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

Properties

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

Task 3-18-7: Deleting Node Transactions

This step runs PTUPG_TRX.DMS, which removes obsolete node transaction data associated with the obsolete objects in the PTUPGIBDELETE project. This script was generated by the UPGPT848IBUG Application Engine program.

Properties

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

Task 3-19: Converting Integration Broker Objects

In this task, the 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 04 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 that are run in this step.

Properties

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

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Task 3-20: Updating Process Request Tables

This task runs the MGRPRCSTBL Application Engine program, which updates existing processes with the correct values for your environment.

Properties

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

Task 3-21: Clearing the Rowset Cache

This step runs CLEAR_ROWSET_CACHE.DMS, which removes RowsetCache objects from the database. The structure of RowsetCache objects may not be compatible across PeopleSoft PeopleTools releases. New RowsetCache objects will automatically be generated after the old RowsetCache objects have been cleared out. This will ensure proper operation of your application with the new PeopleSoft PeopleTools release.

Properties

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

Task 3-22: Setting Object Version Numbers

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

Note. You will rerun the VERSION application engine program later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to rename the files manually after completing this task.

Properties

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

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Task 3-23: Converting Database Data Types

This section discusses:

- Understanding Converting Database Data Types
- Backing Up Before Platform Changes
- Running the Long Data Audit
- Validating the Microsoft Database
- Reviewing Microsoft Settings
- Creating the Microsoft Conversion Project
- Generating the Microsoft Conversion Script
- Running the Microsoft Conversion Script
- Granting Permissions to the CONNECT ID
- Running the Microsoft Conversion Report
- Validating the Oracle Database
- Creating Oracle Audit Tables
- Auditing Duplicate Length Constraints
- Auditing Disabled Constraints
- Reviewing Oracle Settings
- Generating Oracle Conversion Scripts
- Running Long to LOB Script 1
- Running Long to LOB Script 2
- Running Long to LOB Script 3
- Running Long to LOB Script 4
- Running Long to LOB Script 5
- Running Long to LOB Script 6
- Running Long to LOB Script 7
- Running Long to LOB Script 8
- Auditing the Long to LOB Conversion
- Running CLS Drop Indexes Script 1
- Running CLS Drop Indexes Script 2
- Running CLS Drop Indexes Script 3
- Running CLS Drop Indexes Script 4
- Running CLS Drop Indexes Script 5
- Running CLS Drop Indexes Script 6

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- Running CLS Drop Indexes Script 7
- Running CLS Drop Indexes Script 8
- Running Character Length Script 1
- Running Character Length Script 2
- Running Character Length Script 3
- Running Character Length Script 4
- Running Character Length Script 5
- Running Character Length Script 6
- Running Character Length Script 7
- Running Character Length Script 8
- Running CLS Rebuild Indexes Script 1
- Running CLS Rebuild Indexes Script 2
- Running CLS Rebuild Indexes Script 3
- Running CLS Rebuild Indexes Script 4
- Running CLS Rebuild Indexes Script 5
- Running CLS Rebuild Indexes Script 6
- Running CLS Rebuild Indexes Script 7
- Running CLS Rebuild Indexes Script 8
- Auditing Character Length Semantics
- Reviewing Conversion Reports
- Updating Database Options

Understanding Converting Database Data Types

As of PeopleSoft PeopleTools 8.48, new database data types are supported for Microsoft SQL Server 2005 or later and Oracle 9i or later. These data type changes are mandatory for PeopleSoft application releases 9.0 or later. However, if you are either already using the new data types in conjunction with a PeopleSoft application release that is 9.0 or later, or are upgrading to a PeopleSoft application release that is earlier than 9.0, you should *not* run this task and should have already marked the steps in this task as complete in the PeopleSoft Change Assistant template. Do *not* run this task unnecessarily.

For Microsoft SQL Server 2005 and later, the data types VARCHAR, NVARCHAR, VARBINARY(MAX), and VARCHAR(MAX) are now supported. Databases on Microsoft SQL Server 2000 and earlier will not use these new data types. The data types as defined in PeopleSoft Application Designer are not changed; only the database-level definition will be different:

- Records with fields defined as PeopleSoft CHAR(N) will now use VARCHAR(N).
- Records with fields defined as PeopleSoft NCHAR(N) will now use NVARCHAR(N).
- Records with fields defined as PeopleSoft Long Character(N) will now use VARCHAR(N) if N is <=4000 and VARCHAR(MAX) if N is > 4000 for non-Unicode.

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- Records with fields defined as PeopleSoft Long Character(N) will now use NVARCHAR(N) if N is <=4000 and VARCHAR(MAX) if N is > 4000 for Unicode databases.
- Records with fields defined as PeopleSoft IMAGE will now use VARBINARY(MAX).

For Oracle 9i or later, the data types CLOB and BLOB are now supported. In addition, the Character Length Semantics feature is also supported for Unicode databases when creating PeopleSoft CHAR fields and LONG CHARACTER fields with specified lengths less than 1334:

- Records with fields defined as PeopleSoft IMAGE or PeopleSoft LONG CHARACTER with Raw Binary will now use BLOB.
- Records with fields defined as PeopleSoft LONG CHARACTER with no length specified, length greater than 1333 (UNICODE), or length greater than 1333 (ANSI) will now use CLOB.

Task 3-23-1: Backing Up Before Platform Changes

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

Important! For Oracle platforms, contact your database administrator to update the statistics on the database catalog. This will improve performance for subsequent steps in the upgrade. Typically only the users sys and sysdba have the authority to perform this task.

The following command updates the statistics on the database catalog:

```
EXEC DBMS_STATS.GATHER_SCHEMA_STATS('SYS');
```

Properties

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

Task 3-23-2: Running the Long Data Audit

This step runs LONGS-AUDIT.SQL, which audits for any fields exceeding the actual data length for PeopleSoft long character columns. You will review the output in a later step.

Properties

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

Task 3-23-3: Validating the Microsoft Database

This step runs DBSETTINGS.SQL, which checks the Microsoft SQL Server version. The data type conversion is supported only with Microsoft SQL Server 2005 or later. You will review the output in a later step.

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Properties

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

Task 3-23-4: Reviewing Microsoft Settings

If you are upgrading to a PeopleSoft 9.0 or later application release, the data type update *and* a minimum of Microsoft SQL Server 2005 are required. You will run a conversion process that will substitute the old data types for new ones. The data type conversion is supported for Microsoft SQL Server 2005 or later with PeopleSoft PeopleTools 8.48 or later and an application release 9.0 or later. Examine the log file from the step Validating the Microsoft Database to ensure that you are running a supported version of Microsoft SQL Server. Do *not* perform the rest of this task if you do not meet the qualifications.

Examine the log file from the step Running the Long Data Audit to determine if there are any fields shorter than length 4000 in the database that exceed the actual data length defined for the PeopleSoft long character fields. Prior to PeopleSoft PeopleTools 8.48, all PeopleSoft long character fields were created using the TEXT SQL Server data type, and no matter the length defined by the PeopleSoft Application Designer, the data in the field could grow as much as the TEXT limits on SQL Server. After the data type conversion, the length specified in PeopleSoft Application Designer will be enforced for all fields shorter than length 4000, except for those with length zero. If your data is larger than the length defined in PeopleSoft Application Designer, then you must correct the length using PeopleSoft Application Designer or change the data itself using your SQL query tool. You must decide whether you want a change in the field length definition or a change in the data. The log file created by LONGS-AUDIT.SQL will only show all of the fields that contain data exceeding a length between 1 and 4000 and will be empty if this condition does not occur with no other action to take.

Resolve these problems before continuing to the next step, otherwise the conversion process will fail. If necessary, contact your DBA for assistance in modifying the fields. If no fields are listed in the log file, no further action is needed and you may proceed with the upgrade.

Note. During Move to Production passes, copy MSSNEWTYPE_ALTER.SQL from your initial pass upgrade's output directory and place it into the output directory for your Move to Production pass. This script is only generated during the initial pass. Edit the script and correct the database name on the first line of the script to point to the Target database for the pass.

Properties

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

Task 3-23-5: Creating the Microsoft Conversion Project

This step runs MSSNEWTYPE.SQL, which generates and populates the MSSNEWTYPE project. The project contains all of the records that need to be modified to use the newly supported data types.

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Properties

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

Task 3-23-6: Generating the Microsoft Conversion Script

This step generates the SQL script MSSNEWTYPE_ALTER.SQL to alter the records in the MSSNEWTYPE project. The generated script will alter the tables with the new data types.

Properties

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

Task 3-23-7: Running the Microsoft Conversion Script

This step runs the generated script from the previous step. This will alter the existing tables to use the new data types. All of the tables will be copied into their new representation using the new data types and all of the additional padding blanks derived from the use of the old data types will be truncated.

Properties

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

Task 3-23-8: Granting Permissions to the CONNECT ID

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

Properties

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

Task 3-23-9: Running the Microsoft Conversion Report

This step runs CONVERSION-AUDIT.SQL, which audits for all unconverted fields. You will review the output in a later step.

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Properties

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

Task 3-23-10: Validating the Oracle Database

This step runs the DBSETTINGS.SQL script, which queries the database to determine the value of the NLS_LENGTH_SEMANTICS parameter. You will review the output in a later step.

There are two possible conversions that may occur depending on whether or not the database is Unicode. The Long to LOB conversion will apply to all databases, Unicode or ANSI. CHARACTER LENGTH SEMANTICS (CLS) only applies to Unicode databases. The CLS conversion has a dependency on the init.ora parameter NLS_LENGTH_SEMANTICS. The init.ora parameter NLS_LENGTH_SEMANTICS=CHAR, must be enabled for PeopleSoft Unicode databases prior to executing the conversion. If the database being converted is ANSI, then this setting is not necessary.

Properties

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

Task 3-23-11: Creating Oracle Audit Tables

This step runs PRECNVADT1A.SQL, which drops and re-creates some temporary tables required by the pre-conversion audit SQRs.

If the tables being dropped, CHECK_CONSTRAINTS, DUPLICATE_CONSTRAINTS, and DROP_CONSTRAINTS, don't exist, the execution of this script will generate the following error, which can safely be ignored:

```
ORA-00942: table or view does not exist
```

Properties

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

Task 3-23-12: Auditing Duplicate Length Constraints

This step runs PRECNVADT1.SQR, which checks for duplicate length constraints. This condition can generally exist if the database was created using the Oracle Import utility and CONSTRAINTS=Y was enabled, which is the default setting. You will review the output in a later step.

Note. If this SQR needs to be rerun for any reason, you *must* run PRECNVADT1A.SQL before rerunning PRECNVADT1.SQR.

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Properties

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

Task 3-23-13: Auditing Disabled Constraints

This step runs PRECNVADT2.SQR, which checks for 'not_validated' constraints. Although this condition should not exist in a production database, it may have occurred if data was imported with external utilities, such as SQL Loader. You will review the output in a later step.

Properties

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

Task 3-23-14: Reviewing Oracle Settings

The data type conversion is only supported for Oracle 9i or later when you are upgrading to PeopleSoft PeopleTools 8.48 or later and to a PeopleSoft application release that is 9.0 or later. Do *not* perform the rest of this task if you do not meet the qualifications.

For Unicode databases, examine the log file from the step Auditing Duplicate Length Constraints. If there are any duplicate length constraints, those duplicate constraints must be dropped. Run the utility SQL script, *PS_HOME*\scripts\GENDROPDUPCONSTRAINTS.SQL, to generate the script DROPDUPCONSTRAINTS.SQL, containing an ALTER TABLE *TABLE_NAME* DROP CONSTRAINT for every duplicate constraint found. Run the DROPDUPCONSTRAINTS.SQL to resolve the duplicate length constraints.

For Unicode databases, examine the log file from the step Auditing Disabled Constraints. If there are any disabled or non-validated constraints, these constraints should be re-validated. Run the utility SQL script, *PS_HOME*\scripts\GENREVALIDATECONSTRAINTS.SQL to generate the script REVALIDATECONSTRAINTS.SQL, containing an ALTER TABLE *TABLE_NAME* ENABLE VALIDATE CONSTRAINT *CONSTRAINT_NAME* for every invalid constraint found. Run the REVALIDATECONSTRAINTS.SQL to enable the constraints.

For Unicode databases, examine the log file from the step "Validating the Oracle Database" to determine if the values in the init.ora file are set properly. For Unicode databases, the NLS_LENGTH_SEMANTICS parameter needs to have a value of *CHAR*. This indicates that CHARACTER LENGTH SEMANTICS is enabled and the conversion can continue. If you need to enable Character Length Semantics, work with your database administrator to modify the init.ora for the Target database's SID and set NLS_LENGTH_SEMANTICS to *CHAR*. Then stop and restart the database SID for the setting to take effect.

Note. The NLS_LENGTH_SEMANTICS parameter should be set to *CHAR only* at this point in the upgrade, and should not be set to *CHAR* earlier in the upgrade. If it is set at the time of database creation, the data type conversion scripts will fail with an ORA-30556 error due to the existence of functional indexes on the table.

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Properties

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

Task 3-23-15: Generating Oracle Conversion Scripts

Work with your database administrator to set the following init.ora parameters for the Target database's system identifier (SID). Stop and restart the database SID for the following settings to take effect:

1. Set the following init.ora parameters:

```
db_block_size=8192
db_cache_size=325165824
db_file_multiblock_read_count=8
job_queue_processes=10
shared_pool_size=425829120
pga_aggregate_target=5871947670
parallel_max_servers=8
workarea_size_policy=AUTO
```

Note. If you are using Oracle 10.2.0.5 or higher, you may use the parameters SGA_TARGET=300M and SGA_MAX_SIZE=350M instead of SHARED_POOL_SIZE, DB_CACHE_SIZE, and DB_BLOCK_BUFFERS.

---

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure that you have at least six redo logs sized at 500 MB each.

The Oracle data types script generation program is a Java program which connects to an Oracle database. The prerequisites are Java and the Oracle JDBC Drivers.

The Java JDK required for this conversion program to run (Version 1.5) will automatically be picked up by the .bat file if the *PS_HOME* environment variable is set.

To verify whether the *PS_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %PS_HOME%;
```

   This should return a path, for example:

```
c:\PSOFT\PT852
```

2. If the *PS_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET PS_HOME=PS_Home_location
```

The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the %ORACLE_HOME% environment variable is set.

To verify whether the *ORACLE_HOME* environment variable is set:

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1. At the workstation command prompt, enter the following:

   ```
   echo %ORACLE_HOME%;
   ```

   This should return a path, for example:

   ```
   c:\oracle\product\10.2.0\client_1;
   ```

2. If the *ORACLE_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

   ```
   SET ORACLE_HOME=Oracle_Home_location
   ```

The Oracle data types script generation program is executed using the *PS_HOME*\utility\PSORADataTypesConversion.BAT file, which requires six input parameters:

- THREADS: The number of Java threads that the conversion script generation spawns to generate the scripts. We recommend 10 threads for running this program on Windows.
- ACCESSID: The access ID for the database to be converted.
- ACCESSIDPW: The access password for the database to be converted.
- DBNAME: The database name.
- OUTPUTDIR: A directory path to redirect the generated conversion scripts to a user-specified directory. This must be set to the PeopleSoft Change Assistant output directory for your upgrade pass. PeopleSoft Change Assistant will run the generated scripts later in the upgrade.
- ORACLEVERSION: The version of Oracle Connectivity that you are using (9, 10, or 11).

Example:

```
PS_HOME\utility\PSORADataTypesConversion.bat 10 SYSADM SYSADM MYDB c:\upgrade⇒
\output\Change_Assistant_job_directory 11
```

In the example command line above:

- THREADS = 10
- ACCESSID = SYSADM
- ACCESSIDPW = SYSADM
- DBNAME = MYDB
- OUTPUTDIR = c:\upgrade\output\Change_Assistant_job_directory
- ORACLEVERSION = 11

Open a command prompt window on the client workstation and execute the Oracle data types script generation program *PS_HOME*\utility\PSORADataTypesConversion.bat. The program will display and write a log (PsOraCnv.log) to the directory specified by the OUTPUTDIR parameter indicating the status of the conversion program. Review PsOraCnv.log and ensure that the conversion scripts were generated cleanly.

For ANSI databases, only LONGTOLOBALTER conversion scripts are generated. For Unicode databases, four sets of scripts are generated: LONGTOLOBALTER conversion scripts, CLSDROPINDEXES scripts, CHARACTERLENGTHSEMANTICSALTER scripts, and CLSREBUILDINDEXES scripts.

After successfully running the conversion program, verify that the generated SQL scripts are located in the staging PeopleSoft Change Assistant output directory for your upgrade pass. Later in the upgrade, PeopleSoft Change Assistant will automatically run the SQL scripts later in the upgrade from the PeopleSoft Change Assistant output directory for your upgrade pass.

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Properties

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

Task 3-23-16: Running Long to LOB Script 1

This step runs LONGTOLOBALTER1.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-17: Running Long to LOB Script 2

This step runs LONGTOLOBALTER2.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-18: Running Long to LOB Script 3

This step runs LONGTOLOBALTER3.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-19: Running Long to LOB Script 4

This step runs LONGTOLOBALTER4.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-20: Running Long to LOB Script 5

This step runs LONGTOLOBALTER5.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-21: Running Long to LOB Script 6

This step runs LONGTOLOBALTER6.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-22: Running Long to LOB Script 7

This step runs LONGTOLOBALTER7.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-23: Running Long to LOB Script 8

This step runs LONGTOLOBALTER8.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-24: Auditing the Long to LOB Conversion

This step runs L2LAUDIT.SQR to report on the output of the long to LOB conversion. You will review the report output in a later step.

Properties

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

Task 3-23-25: Running CLS Drop Indexes Script 1

This step runs CLSDROPINDEXES1.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-26: Running CLS Drop Indexes Script 2

This step runs CLSDROPINDEXES2.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-27: Running CLS Drop Indexes Script 3

This step runs CLSDROPINDEXES3.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-28: Running CLS Drop Indexes Script 4

This step runs CLSDROPINDEXES4.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-29: Running CLS Drop Indexes Script 5

This step runs CLSDROPINDEXES5.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-30: Running CLS Drop Indexes Script 6

This step runs CLSDROPINDEXES6.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-31: Running CLS Drop Indexes Script 7

This step runs CLSDROPINDEXES7.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-32: Running CLS Drop Indexes Script 8

This step runs CLSDROPINDEXES8.SQL, which was generated using PSORADataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-33: Running Character Length Script 1

This step runs CHARACTERLENGTHSEMANTICSALTER1.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-34: Running Character Length Script 2

This step runs CHARACTERLENGTHSEMANTICSALTER2.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-35: Running Character Length Script 3

This step runs CHARACTERLENGTHSEMANTICSALTER3.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-36: Running Character Length Script 4

This step runs CHARACTERLENGTHSEMANTICSALTER4.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-37: Running Character Length Script 5

This step runs CHARACTERLENGTHSEMANTICSALTER5.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-38: Running Character Length Script 6

This step runs CHARACTERLENGTHSEMANTICSALTER6.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-39: Running Character Length Script 7

This step runs CHARACTERLENGTHSEMANTICSALTER7.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-40: Running Character Length Script 8

This step runs CHARACTERLENGTHSEMANTICSALTER8.SQL, which was generated using PSORADataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-41: Running CLS Rebuild Indexes Script 1

This step runs CLSREBUILDINDEXES1.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-42: Running CLS Rebuild Indexes Script 2

This step runs CLSREBUILDINDEXES2.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-43: Running CLS Rebuild Indexes Script 3

This step runs CLSREBUILDINDEXES3.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-44: Running CLS Rebuild Indexes Script 4

This step runs CLSREBUILDINDEXES4.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-45: Running CLS Rebuild Indexes Script 5

This step runs CLSREBUILDINDEXES5.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-46: Running CLS Rebuild Indexes Script 6

This step runs CLSREBUILDINDEXES6.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-47: Running CLS Rebuild Indexes Script 7

This step runs CLSREBUILDINDEXES7.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-23-48: Running CLS Rebuild Indexes Script 8

This step runs CLSREBUILDINDEXES8.SQL, which was generated using PSORADataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-49: Auditing Character Length Semantics

This step runs CLSAUDIT.SQR to report on the output of the character length semantics conversion. You will review the report output in a later step.

Properties

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

Task 3-23-50: Reviewing Conversion Reports

To review the conversion report for Microsoft, examine the log file from the step “Running the Microsoft Conversion Report.” It contains a list of unconverted columns on tables along with its old data type. Fields on tables with no PeopleSoft Application Designer definition will be included in this log. Any unresolved errors from the step “Running the Microsoft Conversion Script” will also be included. If you are using these tables, it is possible to update them manually to use the new data types with a SQL query tool or with an ETL tool. Be very cautious when changing a table, as this could result in data loss or affected functionality. Once any underlying problems have been resolved, you may rerun all of the previous steps in this task to reconvert any remaining objects listed by the audit report.

Note. During Move to Production passes for Microsoft, you must manually convert any remaining objects. During Move to Production passes, the record definition differs from the database table structure, so do *not* build the record with PeopleSoft Application Designer.

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To review the conversion reports for Oracle, examine the log files from running the LONGTOLOBALTER*.SQL scripts. If the database is Unicode, also examine the log files for the CHARACTERLENGTHSEMANTICS*.SQL scripts. Review the output from the step “Auditing the Long to LOB Conversion.” L2LAUDIT.SQR reports on any unconverted long raw columns. The table name, column name, and column data type are listed. For Unicode databases, review the output from the step “Auditing Character Length Semantics.” CLSAUDIT.SQR reports on any unconverted character length columns (Unicode only). Correct any errors listed on the log files or conversion reports before proceeding with the upgrade. You can manually convert any tables listed in the audit, or resolve errors that led to the unconverted columns and rerun the conversion.

Properties

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

Task 3-23-51: Updating Database Options

This step runs UPGDBOPTIONS_ENABLE.SQL. This script updates the database to indicate that the new data types are now enabled.

Properties

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

Task 3-24: Converting Oracle Time Data Types

This section discusses:

- Understanding Oracle Time Data Types Conversion
- Backing Up Before Converting Data Types
- Creating Conversion Audit Tables
- Auditing Date to Timestamp Conversion
- Generating Timestamp Conversion Scripts
- Running Drop Indexes Script 1
- Running Drop Indexes Script 2
- Running Drop Indexes Script 3
- Running Drop Indexes Script 4

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- Running Drop Indexes Script 5
- Running Drop Indexes Script 6
- Running Drop Indexes Script 7
- Running Drop Indexes Script 8
- Running Alter Timestamps Script 1
- Running Alter Timestamps Script 2
- Running Alter Timestamps Script 3
- Running Alter Timestamps Script 4
- Running Alter Timestamps Script 5
- Running Alter Timestamps Script 6
- Running Alter Timestamps Script 7
- Running Alter Timestamps Script 8
- Running Rebuild Indexes Script 1
- Running Rebuild Indexes Script 2
- Running Rebuild Indexes Script 3
- Running Rebuild Indexes Script 4
- Running Rebuild Indexes Script 5
- Running Rebuild Indexes Script 6
- Running Rebuild Indexes Script 7
- Running Rebuild Indexes Script 8

Understanding Oracle Time Data Types Conversion

In PeopleSoft PeopleTools 8.50 and higher, the TIMESTAMP data type is now supported for the PeopleSoft TIME and DATETIME field types. These data type changes are mandatory, and the DATE data type will no longer be used for the TIME and DATETIME fields.

PeopleSoft Change Assistant will display and run the steps in this task *only* if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

Task 3-24-1: Backing Up Before Converting Data Types

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

Important! Contact your database administrator to update the statistics on the database catalog. This will improve performance for subsequent steps in the upgrade. Typically, only the users sys and sysdba have the authority to perform this task.

The following command updates the statistics on the database catalog:

```
EXEC DBMS_STATS.GATHER_SCHEMA_STATS('SYS');
```

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Properties

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

Task 3-24-2: Creating Conversion Audit Tables

This step runs PRETSCNVADT1A.SQL, which drops and re-creates some temporary tables required by the pre-conversion audit SQRs. If the tables being dropped, DERIVEDPSSQLTABLEANDINDEX, DROP_FUNCIDX_CANDIDATES, and DERIVEDTABLESWITHFUNCINDEXES, don't exist, the execution of this script will generate the following error, which you can safely ignore:

```
ORA-00942: table or view does not exist
```

Properties

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

Task 3-24-3: Auditing Date to Timestamp Conversion

This step runs TSCAUDIT.SQR, which reports which columns by table are candidates for DATE to TIMESTAMP data type conversion.

Note. If this SQR needs to be rerun for any reason, you must run PRETSCNVADT1A.SQL before rerunning TSCAUDIT.SQR.

Properties

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

Task 3-24-4: Generating Timestamp Conversion Scripts

This section discusses:

- Understanding Timestamp Conversion Scripts
- Setting Parameters for the Database System Identifier
- Verifying Environment Variables
- Setting the Script Generation Parameters
- Executing the Script Generation Program

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Understanding Timestamp Conversion Scripts

If you are performing your initial upgrade pass, complete all sections in this step to generate timestamp conversion scripts.

Important! During Move to Production passes, copy the DROPINDEXESn.SQL, ALTERTIMESTAMPSn.SQL, and REBUILDINDEXESn.SQL scripts from your initial upgrade pass output directory and place them in the output directory for your Move to Production pass. Edit the REBUILDINDEXESn.SQL scripts and replace the database name in the create index statement with the Move to Production database name, if needed. These scripts can only be generated correctly during the initial pass. You can skip the remaining sections of this step, which only apply to the initial upgrade pass.

You must manually convert any objects that are missed by the conversion; for example, those due to maintenance on records applied on the old release.

Setting Parameters for the Database System Identifier

Work with your database administrator to set init.ora parameters for the Target database's system identifier (SID). You must stop and restart the database SID for these settings to take effect.

To set the parameters:

1. Set the following init.ora parameters:

```
db_block_size=8192
db_cache_size=325165824
db_file_multiblock_read_count=8
job_queue_processes=10
shared_pool_size=425829120
pga_aggregate_target=5871947670
parallel_max_servers=8
workarea_size_policy=AUTO
```

Note. If you are using Oracle 10g or higher, you may use the parameters SGA_TARGET=300M and SGA_MAX_SIZE=350M instead of SHARED_POOL_SIZE, DB_CACHE_SIZE, and DB_BLOCK_BUFFERS.

---

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure that you have at least six redo logs sized at 500 MB each.

Verifying Environment Variables

The Oracle data types script generation program is a Java program that connects to an Oracle database. The prerequisites are Java and the Oracle JDBC Drivers.

The Java JDK required for this conversion program to run (Version 1.5) will automatically be picked up by the .bat file if the *PS_HOME* environment variable is set.

To verify whether the *PS_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %PS_HOME%;
```

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This should return a path, for example:

```
c:\PSOFT\PT850
```

2. If the *PS_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET PS_HOME=PS_Home_location
```

The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the *ORACLE_HOME* environment variable is set.

To verify whether the *ORACLE_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %ORACLE_HOME%;
```

This should return a path, for example:

```
c:\oracle\product\10.1.0\client_1;
```

2. If the *ORACLE_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET ORACLE_HOME=Oracle_Home_location
```

Setting the Script Generation Parameters

You execute the Oracle data types script generation program using the *PS_HOME*\utility \PSORATimestampConversion.bat file, which requires six input parameters. Set the following parameters:

- ACCESSID: The access ID for the database to be converted.
- ACCESSIDPW: The access password for the database to be converted.
- DBNAME: The database name.
- OUTPUTDIR: A directory path to redirect the generated conversion scripts to a user-specified directory. This must be set to the PeopleSoft Change Assistant output directory for your upgrade pass. PeopleSoft Change Assistant will run the generated scripts later in the upgrade.
- SCRIPTQTY: The number of concurrent scripts to generate. This parameter is mandatory. The recommendation is 8.
- ORACLEVERSION: The version of Oracle Connectivity that you are using (9, 10, or 11).

Example:

```
PS_HOME\utility\PSORATimestampConversion.bat SYSADM SYSADM MYDB c:\upgrade\output⇒
\Change_Assistant_job_directory 8 11
```

In the example command line above:

- ACCESSID = SYSADM
- ACCESSIDPW = SYSADM
- DBNAME = MYDB
- OUTPUTDIR = c:\upgrade\output\Change_Assistant_job_directory
- SCRIPTQTY = 8
- ORACLEVERSION = 11

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Executing the Script Generation Program

Open a command prompt window on the client workstation and execute the Oracle data types script generation program *PS_HOME*\utility\PSORATimestampConversion.bat.

The program will display and write a log (PsTSOraCnv.log) to the directory specified by the OUTPUTDIR parameter indicating the status of the conversion program. Review PsOraCnvTS.log and ensure that the conversion scripts were generated cleanly.

For all databases, ANSI or Unicode, the following three sets of scripts are generated:

- DROPINDEXESn.SQL
- ALTERTIMESTAMPSn.SQL
- REBUILDINDEXESn.SQL

After successfully running the conversion script generation program, verify that the generated SQL scripts are located in the PeopleSoft Change Assistant output directory for your upgrade pass. Later in the upgrade, PeopleSoft Change Assistant will automatically run the SQL scripts from the PeopleSoft Change Assistant output directory for your upgrade pass.

Properties

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

Task 3-24-5: Running Drop Indexes Script 1

This step runs DROPINDEXES1.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-6: Running Drop Indexes Script 2

This step runs DROPINDEXES2.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-24-7: Running Drop Indexes Script 3

This step runs DROPINDEXES3.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-8: Running Drop Indexes Script 4

This step runs DROPINDEXES4.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-9: Running Drop Indexes Script 5

This step runs DROPINDEXES5.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-10: Running Drop Indexes Script 6

This step runs DROPINDEXES6.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-24-11: Running Drop Indexes Script 7

This step runs DROPINDEXES7.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-12: Running Drop Indexes Script 8

This step runs DROPINDEXES8.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-13: Running Alter Timestamps Script 1

This step runs ALTERTIMESTAMPS1.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-14: Running Alter Timestamps Script 2

This step runs ALTERTIMESTAMPS2.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-24-15: Running Alter Timestamps Script 3

This step runs ALTERTIMESTAMPS3.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-16: Running Alter Timestamps Script 4

This step runs ALTERTIMESTAMPS4.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-17: Running Alter Timestamps Script 5

This step runs ALTERTIMESTAMPS5.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-18: Running Alter Timestamps Script 6

This step runs ALTERTIMESTAMPS6.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-24-19: Running Alter Timestamps Script 7

This step runs ALTERTIMESTAMPS7.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-20: Running Alter Timestamps Script 8

This step runs ALTERTIMESTAMPS8.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-21: Running Rebuild Indexes Script 1

This step runs REBUILDINDEXES1.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-22: Running Rebuild Indexes Script 2

This step runs REBUILDINDEXES2.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-24-23: Running Rebuild Indexes Script 3

This step runs REBUILDINDEXES3.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-24: Running Rebuild Indexes Script 4

This step runs REBUILDINDEXES4.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-25: Running Rebuild Indexes Script 5

This step runs REBUILDINDEXES5.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-26: Running Rebuild Indexes Script 6

This step runs REBUILDINDEXES6.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

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Properties

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

Task 3-24-27: Running Rebuild Indexes Script 7

This step runs REBUILDINDEXES7.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-28: Running Rebuild Indexes Script 8

This step runs REBUILDINDEXES8.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-25: Backing Up After the PeopleTools Upgrade

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

Properties

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

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Task 3-26: Configuring the Scheduler and Server

Tips for configuring and starting the application server:

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

Tips for configuring and starting the process scheduler: Do not enable load balancing, setup a distribution server, or configure a report node for the Process Scheduler at this point in time of the upgrade. PeopleSoft Change Assistant parses the generated log files for errors within a single specified output directory. Review the Process Scheduler log/output directory that is defined within the PeopleSoft Change Assistant environment for any database with the Enable Process Scheduler check box selected.

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

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

Note. In addition, verify your PeopleSoft Change Assistant environment settings for the process scheduler and application server. Modify them as needed to match the servers that you just started.

Properties

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

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CHAPTER 4

Running and Reviewing Compare Reports

This chapter discusses:

- Understanding Compare Reports
- Preparing for Application Changes
- Running the Alter Analyzer Loader
- Renaming Tables
- Running New Release Compare Reports
- Reviewing New Release Compare Reports

Understanding Compare Reports

Now that your Copy of Production database is at the same PeopleSoft PeopleTools release as your new release, you can compare the two databases to see the differences. In this chapter you run and review compare reports to make decisions regarding your upgrade. Be sure that you have plenty of space to run these reports, as some can be rather large.

Task 4-1: Preparing for Application Changes

This section discusses:

- Exporting Project Definitions
- Importing Project Definitions

Task 4-1-1: Exporting Project Definitions

In this step, you export from your Demo database the project definitions that will be used later in this upgrade. This step is run in the initial and Move to Production passes; therefore, during the Move to Production pass, the export is not run against the Demo database. You will import these definitions in the next step.

The script for your upgrade is:

```
DLUPX08E.DMS
```

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Properties

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

Task 4-1-2: Importing Project Definitions

In this step you will import the project definitions into your Copy of Production database. These projects will be used later in this upgrade.

The script for your upgrade is:

```
DLUPX08I.DMS
```

Properties

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

Task 4-2: Running the Alter Analyzer Loader

In this step, you run the PTALTDATLOAD Application Engine program. This process preserves the database structure from your current release in temporary tables to be used later in the upgrade.

Properties

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

Task 4-3: Renaming Tables

This section discusses:

- Understanding Renamed Tables
- Running the RNHCUPK02MSS Script
- Running the RNHCUPK02DB2 Script
- Running the RNHCUPK02DBX Script
- Running the RNHCUPK02IFX Script
- Running the RNHCUPK02ORA Script

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- Running the RNHCUPK02SYB Script

Understanding Renamed Tables

These SQL scripts rename tables, at the database level, to temporary table names. They do not change the Record Definition. These temporary tables will be used in the data conversion programs in a later step.

Near the end of the upgrade tasks, you will run a DDDAUDIT report again. On the report, these temporary tables will be listed in the section listing: “SQL Table defined in the Database and not found in the Application Designer.” Either at that point or later, when you are comfortable with the results of the data conversion, you can drop these temporary tables.

In some database platforms, the related indexes and views must be dropped before the table can be renamed. Oracle has included drop statements for these objects that exist on the Demo version of the database. However, the list of related objects may be different in your environment because of customizations or applied product incidents. You may encounter errors in these scripts because of these differences—for example, the script might try to drop an index or view that you do not have or it cannot rename a table because there are more related objects that need to be dropped. You can ignore these errors and proceed with the test pass. Simply modify these scripts to work for your database and you will not encounter these errors in your next test pass.

Task 4-3-1: Running the RNHCUPK02MSS Script

The RNHCUPK02MSS.SQL script renames tables on the Copy of Production database. This script is for Microsoft SQL Server databases and runs in the initial and Move to Production passes.

Properties

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

Task 4-3-2: Running the RNHCUPK02DB2 Script

The RNHCUPK02DB2.SQL script renames tables on the Copy of Production database. This script is for DB2 z/OS databases and runs in the initial and Move to Production passes.

Properties

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

Task 4-3-3: Running the RNHCUPK02DBX Script

The RNHCUPK02DBX.SQL script renames tables on the Copy of Production database. This script is for DB2 UDB databases and runs in the initial and Move to Production passes.

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Properties

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

Task 4-3-4: Running the RNHCUPK02IFX Script

The RNHCUPK02IFX.SQL script renames tables on the Copy of Production database. This script is for Informix databases and runs in the initial and Move to Production passes.

Properties

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

Task 4-3-5: Running the RNHCUPK02ORA Script

The RNHCUPK02ORA.SQL script renames tables on the Copy of Production database. This script is for Oracle databases and runs in the initial and Move to Production passes.

Properties

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

Task 4-3-6: Running the RNHCUPK02SYB Script

The RNHCUPK02SYB.SQL script renames tables on the Copy of Production database. This script is for Sybase databases and runs in the initial and Move to Production passes.

Properties

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

Task 4-4: Running New Release Compare Reports

This section discusses:

- Understanding the New Release Compare
- Preserving the Local Message Node

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- Comparing Converted New Release Objects
- Running the New Release UPGCUST Compare
- Creating the UPGIB Project

Understanding the New Release Compare

In this task you will compare your customizations to the new release objects by running a project compare against the Demo database.

Task 4-4-1: Preserving the Local Message Node

In this step, you run the PTUPGMSGNODE Application Engine process to preserve the Local Message Node in the UPGCUST project before the project compare between the Copy of Production and Demo databases.

Properties

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

Task 4-4-2: Comparing Converted New Release Objects

This step populates the UPGCUST project with object types that previously existed as non-comparable system data in the old release and are now comparable in the new release. They are marked **Changed* or **Unchanged* in your Copy of Production environment. Only custom objects should remain in the UPGCUST project.

This step compares the following object types:

- Feed category
- Feed data type
- Feed definition
- Related content layout
- Related content service
- Related content service configuration
- Related content service definition

Properties

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

Task 4-4-3: Running the New Release UPGCUST Compare

This step executes a project compare of comparable objects in the UPGCUST project.

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Properties

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

Task 4-4-4: Creating the UPGIB Project

This step creates a project on your New Release Demo database called UPGIB and executes a database compare of Integration Broker objects. This project will be used to copy new release Integration Broker objects to the Copy of Production and to delete obsolete Integration Broker objects from the Copy of Production.

Properties

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

Task 4-5: Reviewing New Release Compare Reports

This section discusses:

- Reviewing New Release Changes
- Reviewing Additional Upgrade Projects

Task 4-5-1: Reviewing New Release Changes

In this step, analyze the UPGCUST project and related compare reports. Select the Upgrade Flags for the customizations you wish to retain. This project may include object definitions that are on your Copy of Production database but not on the Copy of Current Demo database. Compare reports are viewable when you open the project in PeopleSoft Application Designer. You can use these reports to determine your copy action for each object in the project. By default, all Upgrade Flags in the project are deselected, meaning no action will take place.

If the Target column has the value *Absent* it can indicate one of two possible conditions. If Oracle originally delivered the object definition, then it can be considered obsolete in the new release. This value can also indicate that you originally created the object definition for some custom functionality. To ensure the integrity and functionality of the system, delete obsolete Oracle-delivered objects. If you have made a customization to an obsolete object, refer to the product's Release Notes to assess the functionality of the customization and determine where to reapply it in the new release.

See Appendix: "Using the Comparison Process."

Warning! Carefully review the compare results for URLs, permission lists, and message nodes. It is highly likely that you will want to keep any customizations that you have made to these objects. You will want to migrate your customized local message node. Please be sure to select the Upgrade Flags from within PeopleSoft Application Designer to retain these customizations.

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Note. Steps in the database or third-party software installation documentation can result in Oracle-delivered objects being identified in the compare reports as **Changed* in the Source column. You should investigate all instances where objects are identified as **Changed* in the Source column to determine their origin and determine a plan of action based on the findings for each object.

Properties

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

Task 4-5-2: Reviewing Additional Upgrade Projects

In this step, analyze the UPGIB project and related compare reports, and the UPGNONCOMP project.

The UPGIB project is created in your Demo database by running a full database compare. It contains Integration Broker object definitions. The database compare produces compare reports that you can view by opening the project in PeopleSoft Application Designer. You can use these reports to determine your copy action for each object in the project. Analyze the UPGIB project and select the Upgrade Flags for the customizations you wish to retain.

If the Source column has the value *Absent* it can indicate one of two possible conditions. If Oracle originally delivered the object definition, then the object can be considered obsolete in the new release. Or, this value can indicate that you originally created the object definition for custom functionality. To ensure the integrity and functionality of the system, delete obsolete Oracle-delivered objects. If you have made a customization to an obsolete object, refer to the Release Notes for that product to assess the functionality of the customization and to determine where to reapply it in the new release.

The UPGNONCOMP project is delivered in your Demo database. It contains object definitions that cannot be compared using PeopleSoft Application Designer. The UPGNONCOMP project for your upgrade may contain some or all objects of the following object types: trees, access groups, roles, dimensions, cube definitions, and cube instance definitions. These object definitions are required for your upgraded database to function correctly. You need to review this project to see whether you customized any of the objects. You then need to reapply those customizations later in the upgrade.

See Appendix: “Using the Comparison Process”

Properties

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

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CHAPTER 5

Applying Application Changes

This chapter discusses:

- Understanding Application Changes
- Running the New Release Upgrade Copy
- Updating Database Overrides
- Backing Up After the Upgrade Copy
- Preparing for Data Conversion Analysis
- Running the SQL Rename Tool
- Modifying the Database Structure
- Loading Data for Data Conversion
- Applying Updates Before Data Conversion
- Running the Data Conversion Analyzer
- Backing Up Before Data Conversion
- Running Data Conversion
- Backing Up After Data Conversion
- Finalizing the Database Structure
- Loading Data to Complete System Setup
- Loading Stored Statements
- Running Final Update Statistics
- Completing Application Processes
- Updating Language Data
- Completing the PeopleTools Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports
- Restoring the New Release Demo
- Upgrading Global Payroll Country Extensions

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Understanding Application Changes

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

Task 5-1: Running the New Release Upgrade Copy

This section discusses:

- Exporting Selected PeopleTools Tables
- Importing Selected PeopleTools Tables
- Copying the UPGCUST Project
- Reviewing Copy Results
- Swapping PeopleTools Tables
- Updating Target Values
- Copying the UPGIB Project
- Copying the UPGNONCOMP Project
- Reviewing Project Copy Results
- Exporting New Release Objects
- Importing New Release Objects
- Resetting Object Version Numbers

Task 5-1-1: Exporting Selected PeopleTools Tables

Depending on your upgrade path you will need to export one or more PeopleSoft PeopleTools tables to preserve values on your Copy of Production database. This step exports PeopleSoft PeopleTools tables in the Copy of Production before the upgrade copy has occurred.

The script for your upgrade path is:

```
DLUPX96E.DMS
```

Properties

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

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Task 5-1-2: Importing Selected PeopleTools Tables

Depending on your upgrade path you will need to import one or more PeopleSoft PeopleTools tables to preserve values on your Copy of Production database. This step imports PeopleSoft PeopleTools tables into the Demo database before the upgrade copy occurs.

The script for your upgrade path is:

```
DLUPX96I.DMS
```

Properties

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

Task 5-1-3: Copying the UPGCUST Project

This step copies your customized PeopleSoft PeopleTools and application objects from the Copy of Production database to your Demo database.

Properties

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

Task 5-1-4: Reviewing Copy Results

Review the results of the project copies that were performed in this task. For each of the projects copied, review the copy logs for any errors. Also, verify in PeopleSoft Application Designer that each of the projects copied shows the Done options are checked for those objects you expected to be copied.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. For example, if you chose not to copy a record definition, but neglected to deselect the PeopleCode Upgrade check box for that record, you will receive errors when trying to copy the PeopleCode. PeopleSoft Application Designer maintains PeopleSoft PeopleTools integrity during the copy and will not copy PeopleCode for records that do not exist.

Review any errors you receive during the copy process and determine whether they are acceptable cases or unacceptable errors that need correction. In the example above, either the PeopleCode error is acceptable because you do not intend to copy the record definition, or the error is unacceptable and you should copy the record and then copy the PeopleCode for that record again.

You may get messages similar to “Warning: FIELDNAME is a key field and has been appended to the end of the RECORDNAME record.” This is an acceptable message and you can ignore it.

The following error occurs when copying a Portal Registry Structure that has a different PORTAL_OBJNAME but the same PORTAL_URLTEXT as an existing registry object.

```
Duplicate Key. Portal: portalname, Obj name: objectname, CP: nodename, URL (1st 50⇒
 char): URL
```

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Properties

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

Task 5-1-5: Swapping PeopleTools Tables

This step swaps the base language for tables that contain PeopleSoft PeopleTools Managed Object data and related-language data on your Demo database. This is in preparation for the step, “Exporting New Release Objects.” This script should only be run if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
PT_RELEASE_SWAP.DMS
```

If you would like to automate this step, follow the procedure below.

To make this step automated:

1. Select the step Swapping PeopleTools Tables in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

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

Task 5-1-6: Updating Target Values

This step updates the Message Node table on the Demo database to keep the assignment of the Local Node defined in the Copy of Production. The update uses the copy of the Message Node table taken earlier in the upgrade.

The script for your upgrade path is:

```
DLUPX97.DMS
```

Properties

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

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Task 5-1-7: Copying the UPGIB Project

This step copies new release Integration Broker objects from the Demo database to your Copy of Production database. This step also deletes obsolete Integration Broker objects from your Copy of Production database.

Properties

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

Task 5-1-8: Copying the UPGNONCOMP Project

In this step, copy the non-compare project, UPGNONCOMP. This project consists of object types you cannot compare and object types not included in your compare project. In a previous step, you reviewed this Oracle-delivered project and modified the Upgrade check box for any objects you did not want to copy.

Properties

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

Task 5-1-9: Reviewing Project Copy Results

Review the results of the UPGIB and UPGNONCOMP project copy steps that were performed earlier in this task. Review each copy log for any errors and verify in PeopleSoft Application Designer that the Done options are checked for the objects in each of the projects.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. Review any errors you received during the copy process to determine whether they are acceptable cases or unacceptable errors that need corrective action.

Properties

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

Task 5-1-10: Exporting New Release Objects

This step exports the new release objects and your customizations that you copied to the Demo database in an earlier step, to a file.

The script name for your upgrade path is:

```
PT_RELEASE_EXPORT.DMS
```

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Properties

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

Task 5-1-11: Importing New Release Objects

This step imports the new release objects and your customizations into your Copy of Production database.

The script name for your upgrade path is:

```
PT_RELEASE_IMPORT.DMS
```

Properties

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

Task 5-1-12: Resetting Object Version Numbers

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

Note. You will rerun the VERSION Application Engine program later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to manually rename the files after completing this step.

Properties

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

Task 5-2: Updating Database Overrides

This section discusses:

- Understanding Database Overrides
- Setting Index Parameters After Copy
- Setting Tablespace Names After Copy
- Creating New Tablespaces

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Understanding Database Overrides

In this task, you update PeopleSoft PeopleTools tables with DDL information from your physical database DDL. You may have overwritten information about where tables exist in your database during the copy project steps of this upgrade. The following steps synchronize your PeopleSoft PeopleTools table definitions with your database again.

In the new release, certain tables have moved from 4K to 32K page size tablespaces. Make sure that these tables are created or altered in the 32K tablespaces. See the reference below for a complete list of tables.

See Appendix, “Reviewing Tablespaces.”

Task 5-2-1: Setting Index Parameters After Copy

This step updates index overrides stored in the PSIDXDDLPARM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

```
SETINDEX.SQR
```

Properties

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

Task 5-2-2: Setting Tablespace Names After Copy

This step updates tablespace names stored in the PSRECTBLSPC table. In addition, the values stored in the DDLSPACENAME field are updated with current values found in the system catalog. If you modified tablespace names from the delivered names, this process makes those same changes in the PeopleSoft system record definition. It also corrects any tablespace names that were reset with values from the Demo database during the copy project step. The process then lists any tablespaces defined in the PeopleSoft PeopleTools tables that are not currently on your database. Use this report to create new tablespaces later in this task. The name of the process is:

```
SETSPACE.SQR
```

Note. This step updates both the database and tablespace names in the PSRECTBLSPC table for DB2 z/OS sites. The report produced by this process lists database/tablespace combinations that were not defined in the DB2 system catalog. The report may show your Demo database and tablespace names instead of your Copy of Production database and tablespace names. You will correct this situation when you create new tablespaces.

See Creating New Tablespaces.

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Properties

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

Task 5-2-3: Creating New Tablespaces

This section discusses:

- Prerequisites
- Creating Delivered Tablespaces
- Creating Custom Tablespaces

Prerequisites

Before you perform this step, you must make sure that your database administrator has created all new tablespaces that will be used in new tables.

Note. DB2 z/OS sites need to create databases as well as tablespaces at this time.

Creating Delivered Tablespaces

If you use delivered tablespace names, be aware that there may be new ones in this release. The report that you produced when you set tablespace names after copying provides a list of tablespaces that are missing from your database.

See Setting Tablespace Names After Copy.

You need to create all the tablespaces on the report listed as missing on the database. Once you create all the tablespaces, you can rerun the SETSPACE.SQR; the report should show that no additional modifications are needed.

Oracle delivered a shell SQL script containing the DDL commands to create all the delivered tablespaces. Edit the script to create just the new tablespaces and to set up the script for your environment.

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

- HCDDL.SQL for Oracle or DB2 z/OS ANSI
- HCDDLU.SQL for DB2 z/OS Unicode
- HCDDLDMS.SQL for DB2 UNIX/NT ANSI
- HCDDLDMSU.SQL for DB2 UNIX/NT Unicode
- HCDDL.SH for Informix

Note. For DBX sites, create all the tablespaces on the report listed as missing on the database in addition to the corresponding index (IDX) tablespace.

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Note. For DB2 z/OS only, some tables were reassigned to larger tablespaces because they now require a 32-KB buffer pool. You must manually edit the Create Table statements in the upgrade scripts to replace the tablespace names with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool.

DB2 z/OS sites must also consider how database names are assigned. After the upgrade/copy is completed, some of the PeopleSoft PeopleTools metadata tables in your Copy of Production database will contain the database values from the Demo database. Review the SETSPACE SQR report for those tables that are reported as not defined in the database. If the report shows your Demo database names instead of your Copy of Production database names you can reset them with the following SQL:

```
UPDATE PSRECTBLSPC SET DBNAME = 'Copy of Production dbname'
WHERE DBNAME = 'Demo dbname'
```

Creating Custom Tablespaces

If you will use custom tablespaces, create those tablespaces now. Choose one of the following two methods to get the information into PeopleSoft PeopleTools:

- Update PeopleSoft PeopleTools for each record you will put into a custom tablespace. You can do this directly through PeopleSoft Application Designer, or you can update PSRECTBLSPC directly by using the appropriate SQL for your site, as follows:

  DB2 z/OS sites:

  ```
  UPDATE PSRECTBLSPC
  SET DBNAME = 'new dbname', DDLSPACENAME = 'new tablespacename'
  WHERE DBNAME = 'current dbname'
  AND DDLSPACENAME = 'current tablespacename';
  ```

  All other sites:

  ```
  UPDATE PSRECTBLSPC
  SET DDLSPACENAME = 'new tablespacename'
  WHERE DDLSPACENAME = 'current tablespacename';
  ```

  To update each table individually, add the following clause to the predicate of the above statement, making sure you use the record name in this clause:

  ```
  AND RECNAME = record name
  ```

  The SETSPACE report contains the table name. The record name will not have the “PS_” prefix.

  You can double-check that you created all tablespaces by rerunning the SETSPACE.SQR report. If you created all tablespaces for records defined in PeopleSoft PeopleTools, the report will be empty.

- When you edit the Create and Alter scripts, you can change the SQL to create the tables in the correct tablespaces. Later in this task you will set tablespace names, which will update PeopleSoft PeopleTools with the correct tablespaces or database/tablespace in DB2 z/OS. The report should be empty at that time.

Note. For DB2 z/OS sites, the SETSPACE report may list some database/tablespace combinations as “Table Undefined - DB/TS OK” when in fact the database name is one that was defined for your Demo database. This occurs if your Demo and Copy of Production databases are in the same DB2 subsystem. The SETSPACE.SQR detected that the database/tablespace combinations do exist in the subsystem and are therefore valid. Make sure that you update these database/tablespace names to match those that exist in your Copy of Production, using the instructions above.

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Note. During the Move to Production pass, you will create these tablespaces when you populate tablespace data. You can reuse this script, or you can create a new script for your production environment. To reuse the script you have created for this task, save it and copy it into the *PS_APP_HOME*\SCRIPTS directory that you use during the Move to Production pass.

See the PeopleTools installation guide for DB2 UDB for z/OS for your new release, “Creating a Database,” Correcting Invalid Database/Tablespace Combinations.

See Modifying the Database Structure, Editing the Create and Alter Scripts.

See Modifying the Database Structure, Setting Tablespace Names.

See “Applying PeopleTools Changes,” Populating Tablespace Data.

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

Properties

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

Task 5-3: Backing Up After the Upgrade Copy

This section discusses:

- Backing Up Your Database After Upgrade Copy
- Backing Up the New Release Demo Again

Task 5-3-1: Backing Up Your Database After Upgrade Copy

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

Properties

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

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Task 5-3-2: Backing Up the New Release Demo Again

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

Properties

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

Task 5-4: Preparing for Data Conversion Analysis

This section discusses:

- Populating the Initial Alter Analyzer Repository
- Populating the MTP Alter Analyzer Repository
- Copying the EOUF_UPGRADE_FRAMEWORK Project
- Building the EOUF_UPGRADE_FRAMEWORK Project
- Running the EOUF_UPGRADE_FRAMEWORK Script

Task 5-4-1: Populating the Initial Alter Analyzer Repository

This task runs the PTALTANLYZR Application Engine program. This program determines how the database structure is different between your current release and the new release.

Properties

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

Task 5-4-2: Populating the MTP Alter Analyzer Repository

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. This task runs the PTALTANLYZER Application Engine program for the Move to Production pass. This program determines how the database structure is different between your current release and the new release.

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Properties

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

Task 5-4-3: Copying the EOUF_UPGRADE_FRAMEWORK Project

This step copies the EOUF_UPGRADE_FRAMEWORK project from the Source database to the Target database. The EOUF_UPGRADE_FRAMEWORK project contains all objects that need to exist in the database in order for the Data Conversion analyzer to run properly.

Run this step only in the Initial pass. The project is copied in the task Preparing for Application Changes during the Move to Production passes.

See "Running and Reviewing Compare Reports," Preparing for Application Changes.

Properties

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

Task 5-4-4: Building the EOUF_UPGRADE_FRAMEWORK Project

This step generates the SQL script to create and alter tables and views delivered in the EOUF_UPGRADE_FRAMEWORK project. The tables are altered to add new columns, rename existing columns, change columns that have modified properties, and delete columns. The script re-creates views and modified indexes. New indexes are also created.

The script for your upgrade path is:

```
EOUF_UPGRADE_FRAMEWORK.SQL
```

Properties

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

Task 5-4-5: Running the EOUF_UPGRADE_FRAMEWORK Script

This step runs the script generated in the previous step.

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Properties

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

Task 5-5: Running the SQL Rename Tool

This section discusses:

- Understanding the SQL Rename Tool
- Running the SQL Rename Tool for RNHCUPK02

Understanding the SQL Rename Tool

In this task, the EOUFEXTRENAM Application Engine program populates the Alter Analyzer tables with additional information contained in the SQL scripts that you ran in the Renaming Tables task of the "Running and Reviewing Compare Reports" chapter. This information is used by EOUF0009.SQR to generate a Table Analysis Report.

See Appendix: “Using Data Conversion Utilities.”

Task 5-5-1: Running the SQL Rename Tool for RNHCUPK02

This step runs the EOUFEXTRENAM Application Engine program. This process creates data to track the renames that were performed in the Copy of Production. The data is used later in the upgrade.

Properties

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

Task 5-6: Modifying the Database Structure

This section discusses:

- Understanding Modifying the Database Structure
- Backing Up for DB2
- Building the Upgrade Tables Script
- Re-Creating Upgrade Tables
- Creating the Upgrade Projects

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- Building the Alter Temporary Tables Script
- Building the Optional Temporary Tables Script
- Creating the ALLTEMPTABS Project
- Building the Create Temporary Tables Script
- Creating the ALLTABS Project
- Building the Create and Alter Scripts
- Recycling Tablespace Version Numbers
- Editing the Create and Alter Scripts
- Re-Creating Required Temporary Tables
- Re-Creating Optional Temporary Tables
- Creating Temporary Tables
- Creating Tables
- Altering Tables
- Creating Indexes
- Re-Creating Triggers
- Reviewing Tablespace and Index States
- Reviewing the Create Indexes Log
- Dropping Indexes for Data Conversion
- Creating Indexes for Data Conversion
- Setting Index Parameters
- Setting Temporary Table Tablespace Names
- Setting Tablespace Names
- Generating the DB2 UNIX RUNSTATS Script
- Updating Statistics for DB2 UNIX
- Updating Statistics for DB2 zOS
- Updating Statistics for Informix
- Updating Statistics for Oracle

Understanding Modifying the Database Structure

In this task you create and run various scripts and processes that will modify your database structure, including creating new tables and indexes, altering tables that have changed, and re-creating modified indexes.

Note. In the PeopleSoft Change Assistant job, some of the steps may complete without error, but display a Warning icon indicating that warning messages exist in the log file.

See the PeopleTools: Change Assistant PeopleBook for your new release, “Error Handling.”

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Task 5-6-1: Backing Up for DB2

If you are using the DB2 z/OS platform, back up your database now. This enables you to restart your upgrade from this point if you should experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

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

Task 5-6-2: Building the Upgrade Tables Script

This step generates the SQL script to drop and re-create all the tables in the project named UPGCONVERT. These tables will be used during data conversion by Application Engine programs. They can be safely dropped at this time because they do not contain application data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCONVERT_CRTTBL.SQL
```

Properties

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

Task 5-6-3: Re-Creating Upgrade Tables

This step runs the SQL script you generated to re-create all the tables in the project named UPGCONVERT.

The script name for your upgrade path is:

```
UPGCONVERT_CRTTBL.SQL
```

Properties

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

Task 5-6-4: Creating the Upgrade Projects

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

In this step, you run the EOUFPOPPROJ Application Engine program. This program generates multiple project definitions and inserts record definitions into the generated projects in your Copy of Production database. Later in the upgrade, create and alter SQL scripts are generated for each of the projects created in this step.

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Properties

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

Task 5-6-5: Building the Alter Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step generates the SQL script to drop and re-create the records of the type Temporary Table in the UPGCRTTMPTBL project. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCRTTMPTBL_CRTTBL.SQL
```

Note. This step is required.

Properties

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

Task 5-6-6: Building the Optional Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step generates a SQL script to drop and re-create the Temporary Table record type in the UPGCRTTMPTBLOPT project. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCRTTMPTBLOPT_CRTTBL.SQL
```

Note. This step is optional.

Properties

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

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Task 5-6-7: Creating the ALLTEMPTABS Project

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step creates a project named ALLTEMPTABS and inserts all records of the type *Table*.

Properties

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

Task 5-6-8: Building the Create Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step generates the SQL script to drop and re-create all the records of type Temporary Table in the database. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
ALLTEMPTABS_CRTTBL.SQL
```

Properties

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

Task 5-6-9: Creating the ALLTABS Project

This step creates a project named ALLTABS and inserts all records of the type *Table*.

Properties

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

Task 5-6-10: Building the Create and Alter Scripts

This step generates the SQL script to create all new records of the type *Table*. The script name is:

```
ALLTABS_CRTTBL.SQL
```

This step generates the SQL script to alter all existing records of the type *Table*. This script is referred to as Alter Without Deletes. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Columns that will eventually be deleted will still exist on the tables after this script is executed. The script name is:

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```
ALLTABS_ALTTBL.SQL
```

This step also generates the SQL script to create new indexes and to re-create modified indexes as needed for the tables in the first two scripts. The script name is:

```
ALLTABS_CRTIDX.SQL
```

Note. This step also creates the script ALLTABS_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, because all database triggers will be created in the "Finalizing the Database Structure" task.

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

See Finalizing the Database Structure.

Properties

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

Task 5-6-11: Recycling Tablespace Version Numbers

The PeopleSoft PeopleTools alter processing for DB2 z/OS was designed to prevent DB2 from creating an excessive number of tablespace versions by carefully controlling which table alters are committed per tablespace. However, it is possible that DB2 may still create the maximum number of tablespace versions when running the alter script if there are shared tablespaces already close to the maximum 255 version numbers.

To minimize the possibility that the alter script will stop with SQL code -4702 (exceeding the maximum number of tablespace versions), find any tablespaces that may be close to the maximum allowed version number and run the Reorg Tablespace and Modify Recovery utilities.

See the PeopleTools: Data Management PeopleBook for your new release, Administering PeopleSoft Databases on DB2 UDB for z/OS, "Working with Alters on DB2 z/OS."

Properties

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

Task 5-6-12: Editing the Create and Alter Scripts

In this step, you will edit the SQL create and alter scripts for tablespace names and sizing. The script names for your upgrade path are:

```
ALLTABS_CRTTBL.SQL
ALLTABS_ALTTBL.SQL
ALLTABS_CRTIDX.SQL
```

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The following scripts may or may not appear in your database. If these are present, edit them for tablespace names and sizing:

```
UPGCRTTMPTBL_CRTTBL.SQL
UPGCRTTMPTBLOPT_CRTTBL.SQL
ALLTEMPTABS_CRTTBL.SQL
```

If you are not using the PeopleSoft tablespace names, you will need to review and modify the scripts above. When the new record was copied to the Copy of Production database, the PeopleSoft default tablespace name was copied as well. When you performed the step, “Creating New Tablespaces,” you were given the option to correct the tablespace names online or to wait and edit the scripts. After you have completed running these scripts you will run the programs that synchronize the PeopleSoft PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleSoft PeopleTools definition. Have your database administrator review these scripts and modify the tablespace names appropriately.

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors. After the upgrade is complete, you may want your database administrator to review and make adjustments to the amount of free space left in some of the tables or tablespaces.

Oracle has provided a list of these new tables with information about how to size them relative to the size of your existing data. This information is meant to give you a rough estimate on an initial size, so you can execute the conversion programs without errors.

See Appendix: “Sizing Tables for the Upgrade.”

Properties

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

Task 5-6-13: Re-Creating Required Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step runs the SQL script you generated to create records of the type *Temporary Table* in the UPGCRTTMPTBL project. The script name for your upgrade path is:

```
UPGCRTTMPTBL_CRTTBL.SQL
```

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Properties

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

Task 5-6-14: Re-Creating Optional Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step runs the SQL script generated to create records of the type *Temporary Tables* in the UPGCRTTMPTBLOPT project.

The script name for your upgrade path is:

```
UPGCRTTMPTBLOPT_CRTTBL.SQL
```

Properties

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

Task 5-6-15: Creating Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step runs the SQL script you generated to create all the records of the type *Temporary Table*. The script name for your upgrade path is:

```
ALLTEMPTABS_CRTTBL.SQL
```

Properties

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

Task 5-6-16: Creating Tables

This step runs the SQL script you generated to create all the records of the type *Table*. This step creates new table structures in your database. The script name for your upgrade path is:

```
ALLTABS_CRTTBL.SQL
```


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Properties

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

Task 5-6-17: Altering Tables

This step runs the SQL script you generated to alter the existing records of type *Table*. This step alters existing PeopleSoft table structures to comply with your new PeopleSoft release.

The script name for your upgrade path is:

```
ALLTABS_ALTTBL.SQL
```

Note. PeopleSoft Change Assistant disables auto-commit when it runs SQL scripts. This is designed to prevent DB2 from creating an excessive number of tablespace versions.

Properties

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

Task 5-6-18: Creating Indexes

This step runs the SQL script you generated to create indexes on records of the type *Table*. This step creates or modifies indexes as required.

The script name for your upgrade path is:

```
ALLTABS_CRTIDX.SQL
```

Properties

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

Task 5-6-19: Re-Creating Triggers

This step executes the script CREATETRGR.DMS, which will re-create all PeopleSoft triggers in the database. The triggers on PeopleSoft tables were invalidated when the tables were altered and need to be re-created.

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Properties

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

Task 5-6-20: Reviewing Tablespace and Index States

After altering tables, DB2 may have placed tablespaces or indices in either an Advisory Reorg Pending (AREO*) or Rebuild Pending (RBDP) status depending on the nature of the change made to a particular table. Run the DB2 display database command to find any tablespaces or indices with either status. Resolve any AREO* or RBDP states by running the DB2 Reorg Tablespace utility before continuing with the upgrade.

See the PeopleTools: Data Management PeopleBook for your new release, Administering PeopleSoft Databases on DB2 UDB for z/OS, “Working with Alters on DB2 z/OS.”

Properties

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

Task 5-6-21: Reviewing the Create Indexes Log

When PeopleSoft Change Assistant runs the create indexes script to create indexes, it will not stop when it encounters errors. When you view the log file, you will see that some indexes cannot be created due to unique index constraints. The data causing those indexes to fail will be updated during the task, “Running Data Conversion.” The indexes will then create successfully during the task, “Finalizing the Database Structure.”

Review the errors in the log file. Unique constraint errors are acceptable. If you see any other types of index creation errors, such as space problems, you must correct them before you continue with the upgrade. If you do not correct the errors, it may degrade your performance during data conversion.

The log file name for your upgrade path is:

```
ALLTABS_CRTIDX.LOG
```

See Running Data Conversion.

See Finalizing the Database Structure.

Properties

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

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Task 5-6-22: Dropping Indexes for Data Conversion

Drop the following indexes using the SQL tool of your choice. These tables are changing key structure and data conversion cannot update the new columns if these old indexes exist. Some of these indexes may not exist because they did not create in the earlier “Creating Indexes” step. This is acceptable.

Table Name	Index Name
PS_JPM_JP_ITEMS	PS_JPM_JP_ITEMS

Properties

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

Task 5-6-23: Creating Indexes for Data Conversion

During this step, you will create indexes to improve performance during data conversion. These indexes are only used for the purposes of data conversion. They are not required for regular operation of the products, therefore they were not created in previous steps nor are they delivered with the record definitions on the Demo database. In this step you are asked to manually create those indexes that apply to you (not using PeopleSoft Application Designer).

It is important to follow the following naming convention so that the Alter with Deletes script you run in the task “Finalizing the Database Structure” will drop these indexes automatically. Use PS[X]Record Name where X is any letter A-Z. For example, if you have to create an index for table PS_COUNTRY_TBL a proper index name would be PSUCOUNTRY_TBL. If an additional index is required for that same table, you can then name it (for example) PSYCOUNTRY_TBL. However, it is important to ensure that the new name of the index you are creating is not defined in the database already.

Not all listed indexes are required for all customers. Reading the comments with each listed index will help you determine if the index is applicable to your specific upgrade. Work with your database administrator to create a script that will build the indexes in your Copy of Production. You can then modify the PeopleSoft Change Assistant template to automate this step (for the initial pass and all future passes too). To do that, go to the Upgrade Template view, then right-click on the step and edit the step properties. Add your script name, without the file extension, in the Script/Procedure field and change the Type to SQL Script.

After reading the comments to determine whether the index is applicable to your situation, create or modify the following indexes in your Copy of Production database:

Table	With Columns	Comments
PS_CM_ROLE	POSITION_NBR SETID EVAL_METHOD	This index should be non-unique. It will improve the performance of UPG_PM.HCPMS17 for PeopleSoft Profile Management customers.

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Table	With Columns	Comments
PS_JPM_JP_ITEMS	JPM_PROFILE_ID JPM_CAT_TYPE JPM_CAT_ITEM_ID JPM_CAT_ITEM_QUAL JPM_CAT_ITEM_QUAL2	This index should be non-unique. It will improve the performance of section UPG_PM.HCPMP50.
PS_PA_HST_SPL_EARN	COMPANY, PAYGROUP PAY_END_DT OFF_CYCLE PAGE_NUM LINE_NUM SEPCHK ERNCD_SPCL	This index should be non-unique. It will improve performance for section UPG_PA89.HCPAS01. Step010. Delete this index after data conversion.
PS_UPG_GRNOPR_TMP	STATE_GARN_LAW GARN_RULE_ID EFFDT GARN_STEP	This index should be non-unique. It will improve the performance of UPG_PY89.HCPYS05 for PeopleSoft North American Payroll customers.
PS_UPG_GRNRL_TMP	STATE_GARN_LAW GARN_RULE_ID EFFDT	This index should be non-unique. It will improve the performance of UPG_PY89.HCPYS05 for PeopleSoft North American Payroll customers.
PS_UPG_GRNXMP_TMP	STATE_GARN_LAW GARN_RULE_ID EFFDT GARN_EX_CALC	This index should be non-unique. It will improve the performance of UPG_PY89.HCPYS05 for PeopleSoft North American Payroll customers.
PS_UPG_VALCMBO_TBL	FDM_HASH	This index should be non-unique. It will improve performance for UPG_PY90.HCPYM01F. Step01
PS_UPGPER_ORG_ASGN	EMPLID, EMPL_RCD	This index should be non-unique. It will improve performance for UPG_HR89.HCHRK01.STEP20

Properties

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

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Task 5-6-24: Setting Index Parameters

This step updates index overrides stored in the PSIDXDDLPARM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

```
SETINDEX.SQR
```

Properties

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

Task 5-6-25: Setting Temporary Table Tablespace Names

This step populates the PeopleSoft PeopleTools table PSRECTBLSPC with the table name, database name, and tablespace name information for the temporary table instances created on the database in a previous step. This information will be required by processes that perform in-stream RUNSTATS (%UpdateStats) on the temporary table instances. The name of the process is:

```
SETTMPIN.SQR
```

Properties

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

Task 5-6-26: Setting Tablespace Names

This step populates all tablespace information in the PSRECTBLSPC table. The values stored in the DDLSPACENAM field are updated with current values found in the system catalog. If you modified tablespace names when you edited the SQL script that created your new tables from the delivered names, this will make those same changes in the PeopleSoft record definition. The name of the process is:

```
SETSPACE.SQR
```

Properties

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

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Task 5-6-27: Generating the DB2 UNIX RUNSTATS Script

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update the statistics on DB2 UNIX/NT.

Properties

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

Task 5-6-28: Updating Statistics for DB2 UNIX

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again. Run the RUNSTATS.SQL script created in the previous step to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

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

Task 5-6-29: Updating Statistics for DB2 zOS

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

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

Task 5-6-30: Updating Statistics for Informix

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script.

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Properties

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

Task 5-6-31: Updating Statistics for Oracle

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

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

Task 5-7: Loading Data for Data Conversion

This section discusses:

- Swapping Languages on System Data
- Exporting Application Messages
- Importing Application Messages
- Exporting Record Groups
- Importing Record Groups
- Exporting the System Setup Data
- Importing the System Setup Data
- Exporting the PW Pagelet Data
- Importing the PW Pagelet Data
- Exporting the Pagelet Wizard Data
- Importing the Pagelet Wizard Data
- Exporting the Feed Data
- Importing the Feed Data
- Exporting Upgrade Defaults
- Importing Upgrade Defaults
- Exporting Application Conversion Data

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- Importing Application Conversion Data
- Exporting Data Conversion Driver Data
- Importing Data Conversion Driver Data

Task 5-7-1: Swapping Languages on System Data

This script swaps the base language for tables that contain system data on your Demo database and have related-language data, in preparation for the system data exports in the next step. This script should be run only if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
DLHCLASWAP_FP2.DMS
```

If you want to make this step automated, follow the steps below.

To make this step automated:

1. Select the step Swapping Languages on System Data in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

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

Task 5-7-2: Exporting Application Messages

This step exports Application Messages data from the Demo database. The script name for your upgrade path is:

```
DLUPX01E.DMS
```

Properties

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

Task 5-7-3: Importing Application Messages

This step imports Application Message data into your Copy of Production database. Message Sets 0-999 are overlaid during the PeopleSoft PeopleTools Upgrade. Application Message Sets 1000-19,999 are overlaid with this task. If you have added custom messages in this set range, you must add those messages again at the end of the upgrade. To prevent this from happening in future maintenance or upgrades, add your custom messages in a set range of 20,000 or greater.

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Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

```
DLUPX01I.DMS
```

Properties

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

Task 5-7-4: Exporting Record Groups

This step exports Record Group data from the Demo database. The script name for your upgrade path is:

```
DLUPX02E.DMS
```

Properties

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

Task 5-7-5: Importing Record Groups

This step imports Record Group data and populates Set Control data in your Copy of Production database. The following records are related to Record Groups and Set Control data:

- REC_GROUP_REC
- REC_GROUP_TBL
- SET_CNTRL_TBL
- SET_CNTRL_GROUP
- SET_CNTRL_REC
- SETID_TBL

The import script deletes from, and then reloads, the Record Group tables, REC_GROUP_REC and REC_GROUP_TBL. These are the tables that are modified when you use PeopleTools, Utilities, Administration, Record Group. The script then rebuilds the related setID tables, PS_SET_CNTRL_GROUP and PS_SET_CNTRL_REC. The PS_SET_CNTRL_TBL and PS_SETID_TBL tables contain the setIDs you use in your system; this script does not update PS_SET_CNTRL_TBL. However, it does check for orphan setID references in PS_SET_CNTRL_REC and adds the missing setIDs to PS_SETID_TBL.

If you have moved an Oracle-delivered record into a custom added record group, and deleted the record from the Oracle-delivered record group, this script will put the record back into the Oracle-delivered record group and remove it from the custom added record group.

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If you have created a new record group, it will be deleted in this step if all of its records are assigned to Oracle-delivered record groups in the new release. To continue using your custom record group, you will need to re-create it in the Reapplying Customizations task.

This script creates an output file and uses it to create a temporary table. To run successfully, the PeopleSoft Configuration Manager input and output PeopleSoft Data Mover directories should be the same.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

```
DLUPX02I.DMS
```

Properties

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

Task 5-7-6: Exporting the System Setup Data

This script exports the contents of the Message, Strings, Stored Statements, Record Group, data conversion driver, EDI, and Mass Change tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran other scripts to load this data and in some cases had to reapply customizations. This script exports the entire contents of these tables, including customizations, so that you will not need to reapply them after the Move to Production. The script name for your upgrade path is:

```
MVAPPEXP.DMS
```

Properties

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

Task 5-7-7: Importing the System Setup Data

This script imports the data exported in the previous step into your New Copy of Production database during your Move to Production passes. This script replaces many scripts that you ran in the initial pass. It will move all data in these tables so that any customizations you have added to these tables during your initial pass will be moved to your New Copy of Production database. Also, it will rebuild the Set Control tables using the Record Groups from the Copy of Production database and your current Set Control values on the New Copy of Production database. The script name for your upgrade path is:

```
MVAPPIMP.DMS
```


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Properties

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

Task 5-7-8: Exporting the PW Pagelet Data

This script exports the application-specific Pagelet Wizard pagelet definition, header, footer, and category tables from the Demo database in the initial pass. The script name for your upgrade path is:

```
DLUPX14E.DMS
```

Properties

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

Task 5-7-9: Importing the PW Pagelet Data

This script imports the application-specific data for the Pagelet Wizard pagelet definition, header, footer, and category tables into your Copy of Production database during the initial pass. This data is needed for the data conversion. The script name for your upgrade path is:

```
DLUPX14I.DMS
```

Properties

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

Task 5-7-10: Exporting the Pagelet Wizard Data

This script exports the contents of the Pagelet Wizard tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran programs and scripts to load this data and, in some cases, had to make changes. This script exports the entire contents of these tables, including changes, so that you will not need to reapply them after the Move to Production. This data is needed for the data conversion. The script name for your upgrade path is:

```
MVUPX16E.DMS
```

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Properties

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

Task 5-7-11: Importing the Pagelet Wizard Data

This script imports the Pagelet Wizard tables from the Copy of Production database into the New Copy of Production during your Move to Production passes. This script replaces processes that you ran in the initial pass. It will move all data in the affected tables so that any changes you have made during your initial pass will be moved to your New Copy of Production database. This data is needed for the data conversion. The script name for your upgrade path is:

```
MVUPX16I.DMS
```

Properties

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

Task 5-7-12: Exporting the Feed Data

This script exports the application-specific Feed Definitions, Feed Data Type Definitions, and other Feed-related system data from the Demo database in the initial upgrade pass. The script name for your upgrade path is:

```
PTUPGPTFPEXP.DMS
```

Properties

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

Task 5-7-13: Importing the Feed Data

This script exports the application-specific Feed Definitions, Feed Data Type Definitions, and other Feed-related system data into your Copy of Production database during the initial upgrade pass. The script name for your upgrade path is:

```
PTUPGPTFPIMP.DMS
```


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Properties

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

Task 5-7-14: Exporting Upgrade Defaults

This script exports the upgrade default data values and mapping during your Move to Production passes. This is the data that you set up during the chapter “Preparing Your Database for Upgrade” of your initial upgrade pass. You will load this information into your New Copy of Production later in the Move to Production upgrade pass. The script name for your upgrade path is:

```
MVHC89EXP.DMS
```

See “Preparing Your Database for Upgrade.”

Properties

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

Task 5-7-15: Importing Upgrade Defaults

This script imports the upgrade default data values and mapping that you set up during the chapter “Preparing Your Database for Upgrade,” of your initial upgrade pass. The script name for your upgrade path is:

```
MVHC89IMP.DMS
```

See “Preparing Your Database for Upgrade.”

Properties

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

Task 5-7-16: Exporting Application Conversion Data

In this step, you will export data, from the Demo database, required for data conversion. The script name for your upgrade path is as follows:

```
DLHCUPP01E.DMS
```

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Properties

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

Task 5-7-17: Importing Application Conversion Data

In this step, you will import data into your Copy of Production database for use during data conversion. The script name for your upgrade path is:

```
DLHCUPP01I.DMS
```

Properties

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

Task 5-7-18: Exporting Data Conversion Driver Data

This step exports data conversion Application Engine driver data from the Demo database. The script name for your upgrade path is:

```
DLUPX03E.DMS
```

Properties

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

Task 5-7-19: Importing Data Conversion Driver Data

This step imports data conversion Application Engine driver data into your Copy of Production database.

The script name for your upgrade path is:

```
DLUPX03I.DMS
```

Properties

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

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Task 5-8: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your Demo database. Now you should check My Oracle Support again for any new postings, and apply them now.

See My Oracle Support, Knowledge Tab, search for your new PeopleSoft HCM Upgrade page.

This is just one place that you can apply updates. There are other places in the upgrade process where applying updates may be applicable as well. How you apply the update varies depending on where you are in the upgrade.

See Appendix: "Applying Fixes Required for Upgrade."

Important! Apply all fixes listed under the product line/release, even if you have not licensed the product the fix is listed under. There are many interdependencies between products and database objects. If you do not apply the fix, you may be introducing another error in a different area of the conversion code.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade Change Packages using the "Download Change Package" functionality in PeopleSoft Change Assistant.
2. Use PeopleSoft Change Assistant to install and apply the updates into your Demo database for this upgrade pass. Review the documentation included with each update prior to applying the update.

   See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your current release.
3. The project is now loaded on your Demo database. You should run a project compare to make sure the objects in the fix will not overwrite any of your customizations. If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.
4. If you are performing a Move to Production upgrade pass, first migrate the Change Packages into the Source database for this upgrade pass. If needed, first set up PeopleSoft Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the Change Package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply it to the Source database.

   See the PeopleTools: Change Assistant PeopleBook for your new release, "Applying Updates."
5. Migrate the Change Packages into the Target database for this upgrade pass. If needed, first set up PeopleSoft Change Assistant with the environment information for your Target database.

Properties

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

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Task 5-9: Running the Data Conversion Analyzer

In this task, you will run the EOUFANALYSIS Application Engine program. This program performs a detailed analysis of the data conversion code within the MAIN data conversion group for your upgrade path to determine the Source and Target Tables used in each Application Engine step. The data generated by this process is used later in the upgrade to calculate the table dependencies between the data conversion sections that are executed at runtime. Review the log file for any warnings or issues that were encountered in analyzing the data conversion code. Review the log file for any warnings regarding SQL that the analyzer was unable to process. You may want to resolve issues on customized data conversion to improve the performance of data conversion.

See Appendix: "Using Data Conversion Utilities."

See Running Data Conversion.

Properties

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

Task 5-10: Backing Up Before Data Conversion

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

Properties

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

Task 5-11: Running Data Conversion

This section discusses:

- Understanding Data Conversion
- Reviewing Data Conversion Tips
- Turning Trace On
- Performing Data Conversion Concurrently
- Turning Trace Off

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Understanding Data Conversion

In this task you will populate new tables and columns. Earlier, you altered tables and added all new and modified columns. You did not, however, remove obsolete columns. The following steps will move data from the obsolete columns to the new columns and tables. Later in this chapter, in the task "Finalizing the Database Structure," you will generate and run SQL to delete those obsolete columns.

Task 5-11-1: Reviewing Data Conversion Tips

This section discusses:

- Reviewing the Upgrade Driver Programs
- Using the Data Conversion Documentation
- Writing Data Conversion for Your Non-Oracle Records
- Reviewing Data Conversion Errors Expected During the Initial Upgrade Pass
- Restarting Data Conversion

Reviewing the Upgrade Driver Programs

UPG_DATACONV is an Application Engine program designed to run upgrade data conversions that are defined in the PRE and POST data conversion groups. Each time the program is run during an upgrade pass, PeopleSoft Change Assistant passes a group number parameter to the program. The program then reads the table PS_UPG_DATACONV, selecting all rows with that group number and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. You can review the sections that are called by the Upgrade Driver program by accessing the Define Upgrade Drivers page on the Demo database.

EOUFDATACONV is an Application Engine program designed to run upgrade data conversions that are defined in PS_UPG_DATACONV for the MAIN data conversion group. However, unlike UPG_DATACONV, EOUFDATACONV leverages dependency analysis to optimize the runtime of the data conversion. Multiple instances of the EOUFDATACONV Application Engine program are designed to be run in parallel to execute against a single set of dependency information.

Using the Data Conversion Documentation

Each section called by the Upgrade Driver program contains comments describing the underlying conversion. By running the UDATACNV.SQR report you can find which sections are called by the Upgrade Driver program and what they are doing.

See Appendix: "Using Data Conversion Utilities."

Writing Data Conversion for Your Non-Oracle Records

The data conversion code delivered for this upgrade was written to handle only Oracle-delivered records. You may have added your own records to the system. To convert data in the underlying tables, you may need to create your own Application Engine library. The Upgrade Driver program can call an Application Engine library section that you create. To have the Upgrade Driver program call your custom section during this task, you will need to add the section on the Define Upgrade Drivers page.

See Appendix: "Using Data Conversion Utilities."

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Reviewing Data Conversion Errors Expected During the Initial Upgrade Pass

During your initial upgrade pass you can expect to have data conversion programs fail. This is because your PeopleSoft software installation is unique, which makes it difficult to write data conversions that will work for everyone all of the time. Your database may be larger than most, you may have customized Oracle-defined records, or you may not have copied all object deletions onto your Copy of Production. These differences will cause data conversion to fail. You must fix each problem on your initial Copy of Production and restart the Application Engine program. Your fixes will be automatically copied to your New Copy of Production during the Move to Production passes and data conversion will run smoothly.

If you have customized records that are delivered from Oracle, you may need to make changes to the Application Engine programs to handle these customizations. For example, here are two situations in which you may need to customize data conversion code:

- If you added fields to an Oracle-delivered record, you may need to add your additional fields to the conversion code for those records.
- If an Oracle-delivered record that you customized will be deleted, you may need to add your own conversions to move the data to a new location.

Use the Find In feature of PeopleSoft Application Designer to determine which Application Engine programs affect your customized records.

To use the Find In feature:

1. Create a project and add all Application Engine programs and related objects that have a name starting with *UPG* and save the project.
2. Select Edit, Find In.
3. Enter each customized record name in the Find What field and your project name in the Project field.
4. Click Find.

   The results will appear in the output window.

Document any changes you make to data conversion programs. This way, if a new version of the program is delivered on My Oracle Support, you will know exactly what changes you have made. You can then reapply the changes to the new version of the program.

If your database is large, you may have data conversion programs that fail due to running out of space as you move data from one table to another. This problem can happen on all RDBMS platforms, but is more of a problem on those platforms using tablespaces. If your data conversion terminates abnormally with a space error, examine the Application Engine SQL statements that caused the problem. Determine where the data is coming from and how much will be moved. Have your database administrator adjust the allocated space accordingly. The data conversion can then be restarted.

In the appendix, “Sizing Tables for the Upgrade,” Oracle has provided the approximate number of rows that will be loaded into some tables.

If you get a data conversion error because a field does not exist on a table, and the field is not one you have customized, check your field renames. If a field that appears on a record that is deleted in the new PeopleSoft release but was not deleted in your compare and copy, your table will be out of sync with what is expected by data conversion. If you had deleted the record, the rename would not happen on the physical table and the field would have the old name. This is what the data conversion program expects. If you did not delete the record, the field was renamed during the altering of tables and the data conversion program will terminate abnormally. Edit the Application Engine SQL to use the name, which is now on your table, and then restart the data conversion.

See Appendix: “Using the Comparison Process.”

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See Appendix: “Sizing Tables for the Upgrade.”

Restarting Data Conversion

Processes run through the PeopleSoft Change Assistant Application Engine step type, do not automatically rename the old log files on restart. Therefore, before restarting a data conversion step that is run through the PeopleSoft Change Assistant Application Engine step type, rename the log file. PeopleSoft Change Assistant uses the same log file name each time you start or restart an Application Engine program. This means that the restarted Application Engine program will replace the original log file if it is not renamed.

Processes run through the PeopleSoft Change Assistant Process Scheduler step type, automatically rename the old log files and create a new log file on restart. The PeopleSoft Change Assistant Log Viewer only displays the logs from the current run process. However, logs from the previous (unsuccessful) runs are retained and accessible in the PeopleSoft Change Assistant Log Directory.

If your data conversion program fails, fix the problem on your Copy of Production and restart the program. When you set the data conversion step to Restart in your PeopleSoft Change Assistant job, it will rerun the program using the PROCESS_INSTANCE and RUN_CNTL_ID from the initial run and the conversion will restart right after the last committed SQL command. Application Engine keeps track of data committed to the database in the table PS_AERUNCONTROL, keyed by PROCESS_INSTANCE and RUN_CNTL_ID.

See Finalizing the Database Structure.

See Appendix: “Sizing Tables for the Upgrade.”

Properties

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

Task 5-11-2: Turning Trace On

Set the Application Engine tracing level to include TraceAE = 16384 for the Process Scheduler prior to running data conversion. This allows details on Application Engine execution time for SQL steps and PeopleCode SQL statements to be collected. This information can be analyzed and used to tune long-running data conversion steps, as reported through EOUF0005.SQR.

See Appendix: “Using Data Conversion Utilities,” Understanding EOUFDATACONV Reporting.

See the PeopleTools: Application Engine PeopleBook, Tracing Application Engine Programs.

Properties

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

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Task 5-11-3: Performing Data Conversion Concurrently

This step runs the EOUFDATACONV Application Engine program for the MAIN data conversion group. After this step completes, you may want to run additional optional reports to obtain information about the data conversion such as execution and duration timings to help you optimize data conversion for your next upgrade pass.

See Appendix: "Using Data Conversion Utilities," Reviewing EO Upgrade Framework Reporting.

Properties

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

Task 5-11-4: Turning Trace Off

Prior to data conversion, Application Engine tracing level 16384 was enabled for the Process Scheduler. After running data conversion, turn off the Application Engine tracing for the Process Scheduler.

See the PeopleTools: Application Engine PeopleBook, Tracing Application Engine Programs.

Properties

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

Task 5-12: Backing Up After Data Conversion

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

Properties

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

Task 5-13: Finalizing the Database Structure

This section discusses:

- Understanding the Final Database Structure
- Building the Alter with Deletes Scripts

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- Altering Tables with Deletes
- Creating Indexes Again
- Creating Triggers
- Running the AE SYNCIDGEN Process
- Creating All Views

Understanding the Final Database Structure

Now that data conversion is complete, this task will alter the tables to remove obsolete columns, and create final indexes and views.

Task 5-13-1: Building the Alter with Deletes Scripts

This step uses the previously created project ALLTABS and generates three SQL scripts: one that will alter tables to drop obsolete columns, one that will also create any remaining indexes that could not be created with the first alter, and one that will create triggers. The script names are:

```
ALLTABS_DEL_ALTTBL.SQL
ALLTABS_DEL_CRTIDX.SQL
ALLTABS_DEL_CRTTRG.SQL
```

Important! All indexes should be created when the ALLTABS_DEL_CRTIDX.SQL script is run. When a unique index fails to be created, it is probably due to a data conversion issue. If a unique index fails to be created, you must resolve the issue and not simply remove the index. To prevent this issue, you can back up tables in the ALLTABS_DEL_ALTTBL.SQL script that will be dropping recfields that have data. This way, if you have an issue you may have the old fields and data that you need to correct it.

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

Properties

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

Task 5-13-2: Altering Tables with Deletes

This step executes the script ALLTABS_DEL_ALTTBL.SQL, which was generated in the previous step.

Properties

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

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Task 5-13-3: Creating Indexes Again

This step executes the script ALLTABS_DEL_CRTIDX.SQL, which was generated in the previous step. All indexes should be created at this time.

Important! Review the log to find any unique indexes that might have failed to be created. All indexes should be created at this time, so those errors are not acceptable and should be corrected. When a unique index fails to be created, it is probably due to a data conversion issue.

Properties

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

Task 5-13-4: Creating Triggers

This step executes the script ALLTABS_DEL_CRTTRG.SQL, which was generated in a previous step.

Properties

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

Task 5-13-5: Running the AE SYNCIDGEN Process

This step executes the AE_SYNCIDGEN Application Engine program to regenerate synchronization IDs. PeopleSoft PeopleTools uses synchronization IDs to give each row a unique identifier. For any tables with the Sync ID column set to the default value of zero, the AE_SYNCIDGEN program will populate the column with the next valid Sync ID value.

Properties

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

Task 5-13-6: Creating All Views

This step runs CREATEVW.DMS to re-create all views in the Copy of Production database. The script will try to create every view in Application Designer. If there is an error on one view, it will keep going until it gets to the end of the list.

Important! Review the log to find any views that failed to be created. All views should be created at this time, so those errors are not acceptable and should be corrected.

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Properties

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

Task 5-14: Loading Data to Complete System Setup

This section discusses:

- Exporting Strings
- Importing Strings
- Exporting EDI Statements
- Importing EDI Statements
- Exporting Mass Change Data
- Importing Mass Change Data
- Exporting XML Service Information
- Importing XML Service Information
- Exporting Related-Language System Data
- Importing Related-Language System Data
- Exporting Application System Data
- Importing Application System Data
- Exporting Data for Your Upgrade Path
- Importing Data for Your Upgrade Path
- Exporting Common Portal System Options
- Importing Common Portal System Options
- Exporting Setup Data
- Importing Setup Data
- Setting Portal System Options
- Setting Menu Pagelet Values
- Exporting Generic Notifications
- Importing Generic Notifications
- Exporting Global Payroll Switzerland Tax Rates 1
- Exporting Global Payroll Switzerland Tax Rates 2
- Exporting Global Payroll Switzerland Tax Rates 3

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- Exporting Global Payroll Switzerland Tax Rates 4
- Exporting Global Payroll Switzerland Tax Rates 5
- Exporting Global Payroll Switzerland Tax Rates 6
- Importing Global Payroll Switzerland Tax Rates 1
- Importing Global Payroll Switzerland Tax Rates 2
- Importing Global Payroll Switzerland Tax Rates 3
- Importing Global Payroll Switzerland Tax Rates 4
- Importing Global Payroll Switzerland Tax Rates 5
- Importing Global Payroll Switzerland Tax Rates 6
- Exporting Centralized Authorization Configuration
- Importing Centralized Authorization Configuration

Task 5-14-1: Exporting Strings

This script exports Strings data from the Demo database. The script name for your upgrade path is:

```
DLUPX04E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 5-14-2: Importing Strings

This script imports Strings data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX04I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

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

Task 5-14-3: Exporting EDI Statements

This script exports EDI Statements from the Demo database. The script name for your upgrade path is:

```
DLUPX05E.DMS
```

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

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Properties

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

Task 5-14-4: Importing EDI Statements

This script imports the EDI Statements into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX05I.DMS
```

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

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

Task 5-14-5: Exporting Mass Change Data

This script exports Mass Change tables from the Demo database. The script name for your upgrade path is:

```
DLUPX06E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 5-14-6: Importing Mass Change Data

This script imports Mass Change tables into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX06I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

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Properties

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

Task 5-14-7: Exporting XML Service Information

This script exports XML service data from the Demo database. The script name for your upgrade path is:

```
DLUPX13E.DMS
```

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

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

Task 5-14-8: Importing XML Service Information

This script imports XML service data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX13I.DMS
```

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

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

Task 5-14-9: Exporting Related-Language System Data

This script exports system data from various application-related language tables in your Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into your Copy of Production. The script name for your upgrade path is:

```
DLHCLASYSE_FP2.DMS
```

Note. During Move to Production passes you can reuse the data files that are created by this export script. Preserve this DAT file, and set the Type of Upgrade property in the PeopleSoft Change Assistant template to Initial Upgrade for this step.

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Properties

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

Task 5-14-10: Importing Related-Language System Data

This script will delete old related-language system data from related-language tables. The script then imports the data exported by the scripts above. The script name for your upgrade path is:

```
DLHCLASYSI_FP2.DMS
```

Properties

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

Task 5-14-11: Exporting Application System Data

This script exports system data from various application tables from the Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

```
DLHCSYSE_FP2.DMS
```

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, change the Type of Upgrade from Both to Initial Upgrade in the step properties and save the job.

Properties

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

Task 5-14-12: Importing Application System Data

This script imports the application system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

```
DLHCSYSI_FP2.DMS
```

Note. Some of the data will be imported using the *ignore dups* option. These data loads will give the message “Error: duplicate SQL rows” and then give a “Successful completion” message. These error messages can be ignored because duplicate data is expected.

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Properties

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

Task 5-14-13: Exporting Data for Your Upgrade Path

This script exports system data from application tables from the Demo database into a PeopleSoft Data Mover *.DAT file that is needed for upgrading from your current release. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

```
DLHCUPK05E.DMS
```

Properties

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

Task 5-14-14: Importing Data for Your Upgrade Path

This script imports the application system data that is needed for upgrading from your current release, which was exported in the above step, into the Copy of Production database. The script name for your upgrade path is:

```
DLHCUPK05I.DMS
```

Properties

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

Task 5-14-15: Exporting Common Portal System Options

This script exports the contents of the Common Portal System Options table from the Demo database. The script name for your upgrade path is:

```
DLEOX01E.DMS
```

Properties

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

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Task 5-14-16: Importing Common Portal System Options

This script imports the Common Portal System Options data into your Copy of Production database. The script name for your upgrade path is:

```
DLEOX01I.DMS
```

Properties

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

Task 5-14-17: Exporting Setup Data

This script exports setup data from the Demo database. The script name for your upgrade path is:

```
DLUPX16E.DMS
```

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 5-14-18: Importing Setup Data

This script imports setup data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX16I.DMS
```

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

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

Task 5-14-19: Setting Portal System Options

This script enables the SWAN look and feel to your system, in addition to the new grid defaults. The script name for your upgrade path is:

```
DLUPX25.DMS
```

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Properties

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

Task 5-14-20: Setting Menu Pagelet Values

This script replaces the menu navigation pagelet with the "Top Menu Features" pagelet. The script name for your upgrade path is:

```
PTREMOVEMENUPGLT.DMS
```

Properties

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

Task 5-14-21: Exporting Generic Notifications

This step exports Generic Notification Templates data from the Demo database. The script name for your upgrade path is:

```
DLHCUPS04E.DMS
```

Properties

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

Task 5-14-22: Importing Generic Notifications

This step imports Generic Notification Templates data into your Copy of Production database.

The script name for your upgrade path is:

```
DLHCUPS04I.DMS
```

Properties

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

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Task 5-14-23: Exporting Global Payroll Switzerland Tax Rates 1

In this step, you export the GPCH_TX_RATES table from the Demo database. The script name for your upgrade path is:

```
DLHCGCHS10E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll Switzerland	All	All

Task 5-14-24: Exporting Global Payroll Switzerland Tax Rates 2

In this step, you export the GPCH_TX_RATES table from the Demo database. The script name for your upgrade path is:

```
DLHCGCHS11E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll Switzerland	All	All

Task 5-14-25: Exporting Global Payroll Switzerland Tax Rates 3

In this step, you export the GPCH_TX_RATES table from the Demo database. The script name for your upgrade path is:

```
DLHCGCHS12E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll Switzerland	All	All

Task 5-14-26: Exporting Global Payroll Switzerland Tax Rates 4

In this step, you export the GPCH_TX_RATES table from the Demo database. The script name for your upgrade path is:

```
DLHCGCHS13E.DMS
```

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll Switzerland	All	All

Task 5-14-27: Exporting Global Payroll Switzerland Tax Rates 5

In this step, you export the GPCH_TX_RATES table from the Demo database. The script name for your upgrade path is:

```
DLHCGCHS14E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll Switzerland	All	All

Task 5-14-28: Exporting Global Payroll Switzerland Tax Rates 6

In this step, you export the GPCH_TX_RATES table from the Demo database. The script name for your upgrade path is:

```
DLHCGCHS15E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll Switzerland	All	All

Task 5-14-29: Importing Global Payroll Switzerland Tax Rates 1

In this step, you import the GPCH_TX_RATES table into your Copy of Production database. The script name for your upgrade path is:

```
DLHCGCHS10I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Switzerland	All	All

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Task 5-14-30: Importing Global Payroll Switzerland Tax Rates 2

In this step, you import the GPCH_TX_RATES table into your Copy of Production database. The script name for your upgrade path is:

```
DLHCGCHS11I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Switzerland	All	All

Task 5-14-31: Importing Global Payroll Switzerland Tax Rates 3

In this step, you import the GPCH_TX_RATES table into your Copy of Production database. The script name for your upgrade path is:

```
DLHCGCHS12I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Switzerland	All	All

Task 5-14-32: Importing Global Payroll Switzerland Tax Rates 4

In this step, you import the GPCH_TX_RATES table into your Copy of Production database. The script name for your upgrade path is:

```
DLHCGCHS13I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Switzerland	All	All

Task 5-14-33: Importing Global Payroll Switzerland Tax Rates 5

In this step, you import the GPCH_TX_RATES table into your Copy of Production database. The script name for your upgrade path is:

```
DLHCGCHS14I.DMS
```

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Switzerland	All	All

Task 5-14-34: Importing Global Payroll Switzerland Tax Rates 6

In this step, you import the GPCH_TX_RATES table into your Copy of Production database. The script name for your upgrade path is:

```
DLHCGCHS15I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Switzerland	All	All

Task 5-14-35: Exporting Centralized Authorization Configuration

This step exports Centralized Authorization Configuration data from the Demo database. The script name for your upgrade path is:

```
DLUPX17E.DMS
```

Properties

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

Task 5-14-36: Importing Centralized Authorization Configuration

This step imports Centralized Authorization Configuration data into the Copy of Production database. The script name for your upgrade path is:

```
DLUPX17I.DMS
```

Properties

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

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Task 5-15: Loading Stored Statements

This section discusses:

- Understanding Loading Stored Statements
- Setting PSOPTIONS for COBOL
- Running the STOREBAS Script
- Running the STOREGP Script
- Running the STOREHRM Script
- Running the STOREPAY Script
- Running the STOREPEN Script
- Running the STOREPYI Script

Understanding Loading Stored Statements

This task loads all the new COBOL stored statements in your database. The STORE*.DMS scripts are located in the *PS_APP_HOME*\SRC\CBL\BASE directory. These scripts are only delivered if you have licensed the product and should only appear in the PeopleSoft Change Assistant job based on the product configuration in the environment definition.

The stored statements scripts are executed only in the initial pass. In the move to production passes, a different script will export the stored statement table, PS_SQLSTMT_TBL, from the first copy of production and import it into the second copy of production.

Task 5-15-1: Setting PSOPTIONS for COBOL

This step runs DB2ALLCCSIDUPD.SQL and updates PSOPTIONS.DB2ALLCCSIDOK. The purpose of the field PSOPTIONS.DB2ALLCCSIDOK is to control whether COBOL processing should be allowed for COBOL processes running under Windows NT/2000 or UNIX against a DB2 z/OS database where the DB2 subsystem zparm for SCCSID is not 37 (US English EBCDIC). A value of 'N' in this field will result in the COBOL process being terminated and value of 'Y' will allow the process to continue.

Note. Move to Production: PSOPTIONS is copied in the Move to Production pass with the MVPRDEXP/IMP scripts.

Properties

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

Task 5-15-2: Running the STOREBAS Script

In this step, you run STOREBAS.DMS. This script loads stored statements for COBOL programs owned by the PeopleSoft Benefits Administration product.

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Properties

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

Task 5-15-3: Running the STOREGP Script

In this step, you run STOREGP.DMS. This script loads stored statements for COBOL programs owned by the PeopleSoft Global Payroll product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll Core	All	All

Task 5-15-4: Running the STOREHRM Script

In this step you run STOREHRM.DMS. This script loads stored statements for COBOL programs.

Properties

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

Task 5-15-5: Running the STOREPAY Script

In this step, you run STOREPAY.DMS. This script loads stored statements for COBOL programs owned by the PeopleSoft Payroll for North America product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Payroll for North America	All	All

Task 5-15-6: Running the STOREPEN Script

In this step, you run STOREPEN.DMS. This script loads stored statements for COBOL programs owned by the PeopleSoft Pension Administration product.

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Properties

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

Task 5-15-7: Running the STOREPYI Script

In this step, you run STOREPYI.DMS. This script loads stored statements for COBOL programs owned by the PeopleSoft Payroll Interface product.

Properties

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

Task 5-16: Running Final Update Statistics

This section discusses:

- Generating Final RUNSTATS for DB2 UNIX
- Running Final Statistics for DB2 UNIX
- Running Final Statistics for DB2 zOS
- Running Final Statistics for Informix
- Running Final Statistics for Oracle

Task 5-16-1: Generating Final RUNSTATS for DB2 UNIX

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update statistics on DB2 UNIX/NT.

Properties

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

Task 5-16-2: Running Final Statistics for DB2 UNIX

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. Run the RUNSTATS.SQL script created in the previous step.

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Properties

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

Task 5-16-3: Running Final Statistics for DB2 zOS

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. 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 5-16-4: Running Final Statistics for Informix

Earlier in the upgrade process you updated your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes and testing. This step runs UPDATESTATS to update the statistics on your database.

Properties

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

Task 5-16-5: Running Final Statistics for Oracle

Earlier in the upgrade process you upgraded your statistics. Now that you have converted all of your data and modified all indexes, update your statistics again to improve performance of your post upgrade processes. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade and testing.

Properties

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

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Task 5-17: Completing Application Processes

This section discusses:

- Updating Names
- Refreshing Personal Data Table
- Exporting Setup Data for Rules
- Importing Setup Data for Rules
- Exporting Payroll Interface Tables
- Importing Payroll Interface Tables
- Exporting US Custom Garnishment Rules
- Importing US Custom Garnishment Rules
- Recompiling Template Built Rules
- Exporting Retro Pay Trigger Data
- Importing Retro Pay Trigger Data
- Rebuilding Security Join Tables

Task 5-17-1: Updating Names

In this step, you update the name fields in all records using all active country name formats. Run the Application Engine Program NAME_DISPLAY to refresh the table.

Properties

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

Task 5-17-2: Refreshing Personal Data Table

In this step, you refresh the Personal Data snapshot table used for reporting. Run the Application Engine program PERS_REFRESH to refresh the table.

Properties

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

Task 5-17-3: Exporting Setup Data for Rules

This step is run only during the Move to Production passes. It exports data from tables that were updated for Template Built and Custom Rules setup during the initial pass.

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Run the following script:

```
MVTLI01E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Time and Labor	All	All

Task 5-17-4: Importing Setup Data for Rules

This step is run only during the Move to Production passes. It will import data from tables that were updated for Template Built and Custom Rules setup during the initial pass.

Run the following script:

```
MVTLI01I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Time and Labor	All	All

Task 5-17-5: Exporting Payroll Interface Tables

This step is run only during the Move to Production passes. It exports all Payroll Interface definitions including data from tables that were updated in the chapter “Completing Database Changes,” Updating Payroll Interface Definitions task during the initial pass.

The script name for your path is:

```
MVHCPIP01E.DMS
```

Properties

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

Task 5-17-6: Importing Payroll Interface Tables

This step is run only during the Move to Production passes. It imports all Payroll Interface definitions including data from tables that were updated in the chapter “Completing Database Changes,” Updating Payroll Interface Definitions task during the initial pass.

The script name for your path is:

```
MVHCPIP01I.DMS
```


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Properties

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

Task 5-17-7: Exporting US Custom Garnishment Rules

This step is run only during the Move to Production passes. If you have created any U.S. garnishment rules, this script will export those rules from garnishment rules tables.

Note. If you have not created any U.S. garnishment rules, you do not have to run this task.

The script name for your path is:

```
MVHCPYS05E.DMS
```

See Appendix: "Understanding Garnishments Changes."

See "Completing Database Changes," Setting Up US Custom Garnishment Rules.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Payroll for North America	All	All

Task 5-17-8: Importing US Custom Garnishment Rules

This step is only run during the Move to Production passes. If you have created any U.S. garnishment rules and run the export script, this script will import those rules into garnishment rules tables.

Note. If you have not created any U.S. garnishment rules, you do not have to run this task.

The script name for your path is:

```
MVHCPYS05I.DMS
```

See Appendix: "Understanding Garnishments Changes."

See "Completing Database Changes," Setting Up US Custom Garnishment Rules.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Payroll for North America	All	All

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Task 5-17-9: Recompiling Template Built Rules

This step automatically recompiles all the Template Built Rules in your Time and Labor environment using a newly delivered batch process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Time and Labor	All	All

Task 5-17-10: Exporting Retro Pay Trigger Data

This step exports retro pay trigger data that was created in “Setting Up Retro Pay Trigger Data” in the Initial pass. This step runs only in the Move to Production passes.

The script name for your upgrade path is:

```
MVHCPYP01E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Payroll for North America	All	All

Task 5-17-11: Importing Retro Pay Trigger Data

This step imports retro pay trigger data created in “Setting Up Retro Pay Trigger Data” during the initial pass. Run this step only during the Move to Production passes.

The script name for your upgrade path is:

```
MVHCPYP01I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Payroll for North America	All	All

Task 5-17-12: Rebuilding Security Join Tables

In this task, you run the Application Engine program to rebuild the Operator Security Join table and the Transaction Side Security Join Tables so they are based on the most current information. You must run this step whether you use department level security or not.

During the initial upgrade pass you ran this process manually after updating your security. During Move to Production your security is automatically copied from your source database, allowing this process to be run automatically.

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Run the Application Engine program UPG_HC_SCRTY.

Properties

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

Task 5-18: Updating Language Data

This section discusses:

- Understanding Updating Language Data
- Running the TSRECPOP Script

Understanding Updating Language Data

In this task, you run scripts to modify data in PeopleSoft PeopleTools-related language tables.

Note. For DB2 z/OS customers, Oracle recommends that you run RUNSTATS against the system catalog tables at this time.

Task 5-18-1: Running 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	Initial	All	All	All

Task 5-19: Completing the PeopleTools Conversion

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 02 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

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Properties

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

Task 5-20: Updating Object Version Numbers

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

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

Properties

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

Task 5-21: Running the Final Audit Reports

This section discusses:

- Running the Final DDDAUDIT Report
- Running the Final SYSAUDIT Report
- Running the Final SYSAUD01 Report
- Creating the FNLALTAUD Project
- Running the Final Alter Audit
- Reviewing the Final Audits
- Running the Final SETINDEX Report

Task 5-21-1: Running the Final DDDAUDIT Report

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

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Properties

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

Task 5-21-2: Running the Final SYSAUDIT Report

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

Properties

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

Task 5-21-3: Running the Final SYSAUD01 Report

SYSAUD01 is an SQR that identifies *orphaned* PeopleSoft objects. SYSAUD01 also identifies other inconsistencies within your database.

Properties

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

Task 5-21-4: Creating the FNLALTAUD Project

In this step, you create the FNLALTAUD project and use it to run your final Alter Audit. Creating this new project now ensures that all the records in your system are audited, including SQL tables. This project also includes any custom records that you have created in your system.

Properties

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

Task 5-21-5: Running the Final Alter Audit

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

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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 5-21-6: Reviewing the Final Audits

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

```
FNLALTAUD_ALTTBL.SQL
FNLALTAUD_CRTIDX.SQL
```

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

See Finalizing the Database Structure.

Note. For Informix sites, if your database has Application Functions, you use SQL to drop and re-create these functions and their associated indexes, even though the underlying tables and indexes have not changed.

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

Review the output from the SYSAUDIT, SYSAUD01, and DDDAUDIT reports and correct any discrepancies.

Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from PeopleSoft Application Designer are not automatically deleted from the system tables. Oracle takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Similarly, your SYSAUDIT and SYSAUD01 reports may have some errors due to references to obsolete PeopleSoft-owned objects. Invalid references are not automatically cleaned up during the upgrade in case you have customizations that you want to modify. For instance, if a PeopleSoft Permission List is deleted, and you have a Role that still refers to that Permission List, then it will appear on the SYSAUDIT and SYSAUD01 reports.

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

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Properties

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

Task 5-21-7: Running the Final SETINDEX Report

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

Properties

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

Task 5-22: Restoring the New Release Demo

Restore your New Release Demo database from the backup made earlier in the chapter "Planning Your Application Upgrade.” The backup was taken before projects were copied and scripts were run against the New Release Demo. This is done to restore the environment to an Oracle-delivered Demo implementation. If your Copy of Production has a base language other than English, this restore will undo any changes you might have made on your New Release Demo (Source) in the tasks "Swapping PeopleTools Tables" and "Swapping Languages on System Data" in the chapter "Applying Application Changes."

Properties

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

Task 5-23: Upgrading Global Payroll Country Extensions

This section discusses:

- Understanding Global Payroll Country Extensions Upgrade
- Performing Manual Steps Before the GPCE Upgrade
- Exporting Global Payroll Country Extensions
- Importing Global Payroll Country Extensions
- Populating the Run Control Table

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- Creating GP Country Extension Rule Packages
- Creating and Exporting Licensed Rule Packages
- Creating and Exporting Unlicensed Rule Packages
- Verifying Rule Package Export Results
- Reapplying Element Customizations
- Stamping Modified Rules During Customization
- Creating and Exporting the Final Rule Package
- Verifying Final Rule Package Export Results
- Creating the Consolidated Non-Rule Package
- Creating New Country Extensions Non-Rule Packages
- Populating the Run Control Table Again
- Importing and Comparing the Licensed Rule Package
- Running the Licensed Compare Validation Report
- Reviewing the Compare and Validation Reports
- Upgrading the Licensed Rule Package
- Running the Licensed Upgrade Validation Report
- Verifying the Licensed Upgrade Validation Report
- Applying the Unlicensed Rule Package
- Running the Unlicensed Upgrade Validation Report
- Verifying the Unlicensed Package Upgrade Report
- Applying the Final Rule Package
- Running Final Package Upgrade Validation Report
- Verifying the Final Package Upgrade Report
- Importing Consolidated Non-Rule Package Elements
- Comparing the Consolidated Non-Rule Package
- Importing the Consolidated Non-Rule Package
- Upgrading the Consolidated Non-Rule Package
- Importing New License Non-Rule Package Elements
- Comparing the New License Non-Rule Packages
- Importing the New License Non-Rule Records
- Upgrading the New License Non-Rule Packages
- Saving Scripts and Data Files for GPCE

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Understanding Global Payroll Country Extensions Upgrade

In this task, you upgrade or add Oracle-delivered elements and system data for each PeopleSoft Global Payroll Country Extension (GPCE) using the Rule and Non-Rule Packager functionality delivered as part of PeopleSoft Global Payroll. You also apply additional steps for each country, when required.

The steps in this task are automated through PeopleSoft Change Assistant and will upgrade your PeopleSoft Global Payroll rules without any customizations. In the “Completing Database Changes” chapter, you have the opportunity to move over any rule customizations you wish to preserve.

Note. Perform this task only if you are upgrading PeopleSoft Global Payroll Country Extensions already installed on your Copy of Production database or you have a new license for PeopleSoft Global Payroll Country Extensions. If you do not use PeopleSoft Global Payroll or use only the PeopleSoft Global Payroll core product, you can skip this task.

Oracle uses the convention “xxx” to indicate the three-character country code as defined by ISO. To apply these instructions, replace “xxx” with the relevant country code.

The following table lists the country codes of the 20 countries that PeopleSoft Global Payroll supports:

Country Extension	Country Codes (ISO Codes)
Argentina	ARG
Australia	AUS
Brazil	BRA
China	CHN
France	FRA
Germany	DEU
Hong Kong	HKG
India	IND
Italy	ITA
Japan	JPN
Malaysia	MYS
Mexico	MEX
Netherlands	NLD
New Zealand	NZL
Singapore	SGP
Spain	ESP
Switzerland	CHE
Thailand	THA
United Kingdom	GBR
United States	USA

Task 5-23-1: Performing Manual Steps Before the GPCE Upgrade

This section discusses:

- Backing Up Before Global Payroll Country Extensions Upgrade
- Setting Up an NT Process Scheduler for UNIX

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Backing Up Before Global Payroll Country Extensions 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.

Setting Up an NT Process Scheduler for UNIX

If your PeopleSoft application runs on UNIX, executing these following tasks involves additional considerations. You need to set up an NT Process Scheduler to run the embedded PeopleSoft Data Mover scripts in this task.

See PeopleSoft Global Payroll 9.1 PeopleBook, “Using the Utilities,” Understanding the Global Payroll Utilities.

Note. The log output files for the GPCE tasks can be located in the Log/Output directory assigned while configuring a process scheduler. For example, C:\PS_HOME\appserv\prcs\db name\log_output. The log files will help in understanding any errors encountered during any of the GPCE tasks.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-2: Exporting Global Payroll Country Extensions

In this step, the data for the installed Global Payroll countries is exported from the Target database. This information is used to create the licensed rule and unlicensed rule package. This information is also used to create the non-rule package for the newly licensed country extensions.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-3: Importing Global Payroll Country Extensions

In this step, the data for installed Global Payroll countries is imported to the Source database. This information is used to import the licensed rule and unlicensed rule package. This information is also used to import the non-rule package for the newly licensed PeopleSoft Global Payroll Country Extensions.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-4: Populating the Run Control Table

In this step, the run control table GP_PKG_RUNCTL is populated. These values are used while exporting the licensed and unlicensed rule packages.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll All Countries	All	All

Task 5-23-5: Creating GP Country Extension Rule Packages

In this step, you create the definition for the licensed country extension rule package, UPGRULL, and the unlicensed country extension rule package, UPGRULU.

Note. This step overwrites any existing Rule Package definitions that have the name UPGRULL or UPGRULU.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-6: Creating and Exporting Licensed Rule Packages

In this step, you create and export the licensed country extensions rule packages. This step creates the following files in the PSHOME path you defined earlier in the upgrade:

```
UPGRULL_EXP.DMS
UPGRULL_IMP.DMS
GP_CLEANUP.DMS
UPGRULL_DAT.DAT
```

Note. This step does not create or export any files if you are only licensing a *new* country extension.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-7: Creating and Exporting Unlicensed Rule Packages

In this step, you create and export the unlicensed country extensions rule packages. This step creates the following files in the PSHOME path you defined earlier in the upgrade:

```
UPGRULU_EXP.DMS
UPGRULU_IMP.DMS
GP_CLEANUP.DMS
UPGRULLU_DAT.DAT
```

Note. This step does not create or export any files if you already have licenses to all 20 country extensions.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-8: Verifying Rule Package Export Results

Verify the rule packages exported by going to the directory PSHOME (which you defined earlier in the upgrade). If the export was successful, you will see the following files:

```
UPGRULL_EXP.DMS
UPGRULL_IMP.DMS
GP_CLEANUP.DMS
UPGRULL_DAT.DAT
```

Note. The files mentioned above will *not* be present if you are only licensing a new country extension.

```
UPGRULU_EXP.DMS
UPGRULU_IMP.DMS
GP_CLEANUP.DMS
UPGRULLU_DAT.DAT
```

Note. The files mentioned above will *not* be present if you already have licenses to all 20 country extensions.

If none of the files mentioned above are in the PSHOME directory, verify the log files generated in the steps “Creating and Exporting Licensed Rule Packages” and “Creating and Exporting Unlicensed Rule Packages.”

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-9: Reapplying Element Customizations

In this step, you reapply your element customizations. When you reviewed your upgrade compare reports, you decided whether to take the Source or Target version of the elements. If you have taken the Oracle-delivered version of an element over your own customized version, you may need to make some modifications to the new elements to ensure you maintain the elements functionality with your system. To reapply these customizations you must make manual adjustments to the elements. In complex cases, this may take several iterations.

When you reapply an element modification, it erases the corresponding GP_VERSION value on the element (GP_PIN) or the corresponding parent Element Definition record (for example, GP_VARIABLE or GP_FORMULA). Later in the upgrade, you will update these erased versions so you can identify those elements where you reapplied modifications.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Global Payroll All Countries	All	All

Task 5-23-10: Stamping Modified Rules During Customization

In this step, you stamp the modified rules with the new release for all elements you modified during the previous step. This process updates the GP_VERSION field with the updated release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Global Payroll All Countries	All	All

Task 5-23-11: Creating and Exporting the Final Rule Package

In this step, you create the final country extensions rule packages on the upgraded Copy of Production database. The package contains all Oracle-delivered, as well as all customized, rule elements for all 20 Global Payroll countries.

Note. If the final country extensions rule package has already been created and exported in a previous Move to Production pass, and no changes to the package are expected during your current pass, you do not have to repeat this step. You can apply the package that was exported during the previous Move to Production pass on the Target database.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Global Payroll All Countries	All	All

Task 5-23-12: Verifying Final Rule Package Export Results

Verify the export was successful by going to the PSHOME directory you defined earlier in the upgrade. The following files should exist:

```
GPCERUL_EXP.DMS
GPCERUL_IMP.DMS
GP_CLEANUP.DMS
GPCERUL_DAT.DAT
```

Note. Make sure to store the generated script and data files until the *final* upgrade pass is complete. They will be needed for all the upgrade passes.

If the files mentioned above are not in the PSHOME directory, verify the log files generated in the step "Creating and Exporting the Final Rule Package."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Global Payroll All Countries	All	All

Task 5-23-13: Creating the Consolidated Non-Rule Package

In this step, you create a consolidated non-rule package containing the upgrade system data for all PeopleSoft Global Payroll Country Extensions. The package definition UPGGPCE is delivered in the New Release Demo database. The package will contain related language records as well.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-14: Creating New Country Extensions Non-Rule Packages

Each PeopleSoft Global Payroll Country Extension delivers a non-rule package definition named XXXSYS, where "XXX" is the country's ISO code, that contains the install system data for that country extension. The package also contains related language records. In this step, you create and export the XXXSYS packages for all the country extensions that you are newly licensing on the New Release Demo database.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Global Payroll All Countries	All	All

Task 5-23-15: Populating the Run Control Table Again

In this step, the run control table GP_PKG_RUNCTL is populated. These values will be used when you import the licensed and unlicensed rule package.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-16: Importing and Comparing the Licensed Rule Package

In this step, you import and compare the licensed rule package, UPGRULL.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-17: Running the Licensed Compare Validation Report

In this step, you run the Licensed Package Compare Validation Report SQR.

The script for your upgrade path is:

```
UVGPX10.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

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Task 5-23-18: Reviewing the Compare and Validation Reports

In this step, you will review the Rule Package Compare Report that was generated in the previous step, for detailed information about which elements are in error or warning status. Also review the file to see which elements are being added or modified. This is a field-by-field compare report.

See *PeopleSoft Global Payroll 9.1 PeopleBook,* "Using the Utilities."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-19: Upgrading the Licensed Rule Package

In this step, you upgrade the licensed rule package, UPGRULL.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-20: Running the Licensed Upgrade Validation Report

In this step, you run the Licensed Package Upgrade Validation Report.

The script for your upgrade path is:

```
UVGPX20.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-21: Verifying the Licensed Upgrade Validation Report

In this step, verify the Licensed Package Upgrade Validation Report generated in the previous step.

Verify that the count of elements resulting in Error/Warnings is zero (0).

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-22: Applying the Unlicensed Rule Package

In this step, the unlicensed country extensions rule package is applied on the Copy of Production database during the initial pass.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-23: Running the Unlicensed Upgrade Validation Report

In this step, run the Unlicensed Package Upgrade Validation Report.

The script for your upgrade path is:

```
UVGPX20.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 5-23-24: Verifying the Unlicensed Package Upgrade Report

In this step, verify the Upgrade Validation report generated in the previous step.

Verify that the count of elements resulting in Error/Warnings is zero (0).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

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Task 5-23-25: Applying the Final Rule Package

The final country extensions rule package, GPCERUL, has to be applied on the New Copy of Production database during the Move to Production pass.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 5-23-26: Running Final Package Upgrade Validation Report

In this step, run the Final Package Upgrade Validation Report.

The script for your upgrade path is:

```
UVGPX20.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 5-23-27: Verifying the Final Package Upgrade Report

In this step, verify the Final Package Upgrade Validation report generated in the previous step.

Verify that the count of elements resulting in Error/Warnings is zero (0).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 5-23-28: Importing Consolidated Non-Rule Package Elements

This step imports the consolidated non-rule package, UPGGPCE.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-29: Comparing the Consolidated Non-Rule Package

This step compares the consolidated non-rule package, UPGGPCE.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-30: Importing the Consolidated Non-Rule Package

This step imports the consolidated non-rule package, UPGGPCE.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-31: Upgrading the Consolidated Non-Rule Package

This step upgrades the consolidated non-rule package, UPGGPCE.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-32: Importing New License Non-Rule Package Elements

This step imports the non-rule package, XXXSYS, for new licenses where “XXX” is each country’s ISO code.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-33: Comparing the New License Non-Rule Packages

This step compares the non-rule package, XXXSYS, for new licenses where “XXX” is each country’s ISO code.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-34: Importing the New License Non-Rule Records

This step imports the non-rule package record, XXXSYS, for new licenses where “XXX” is each country’s ISO code.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-35: Upgrading the New License Non-Rule Packages

This step upgrades the non-rule package, XXXSYS, for new licenses where “XXX” is each country’s ISO code.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 5-23-36: Saving Scripts and Data Files for GPCE

Save all generated .DAT, XXXIMP.DMS, and GP_CLEANUP.DMS files from this task as they will be needed in your Move to Production passes. These files are only generated during the initial pass. Copy the files to the <PSHOME>\dat and <PSHOME>\scripts directories respectively prior to starting any of the Move to Production passes.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

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CHAPTER 6

Completing Database Changes

This chapter discusses:

- Understanding Database Changes
- Configuring the Upgrade Environment
- Reapplying Customizations
- Setting Up Security
- Completing Portal Data Conversion
- Updating Department Security
- Backing Up Before Manual Changes
- Running the GPCE Delete Process
- Upgrading Global Payroll Country Extensions Manually
- Updating Payroll Interface Definitions
- Verifying Record and RecordField References
- Updating Jobs and Process for GP Packager
- Upgrading Rules
- Validating EE Garn Payee Data
- Setting Up US Custom Garnishment Rules
- Validating EE Garn Rule Data
- Setting Up Retro Pay Trigger Data
- Validating Pay Group Retro Setup
- Validating Budget Actuals
- Running the Encumbrance Process
- Reapplying Absence Management Direct Reports UI
- Updating the Employee ID Length
- Reviewing Recruiting Solutions
- Reviewing PeopleTools Functionality
- Enabling Oracle Transparent Data Encryption
- Preparing the Content Provider Registry
- Updating the Portal Options Data

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- Deleting Rename Data
- Stamping the Database
- Reviewing Change Control
- Backing Up Before Testing
- Testing Your Copy of Production

Understanding Database Changes

Many changes were made in the previous chapters of this documentation. In this chapter, you complete these changes so that you can begin testing your Copy of Production. By testing your Copy of Production, you ensure that you can still operate day-to-day processes on your new PeopleSoft release.

Task 6-1: Configuring the Upgrade Environment

This section discusses:

- Configuring the Web Server
- Configuring Portal

Task 6-1-1: Configuring the Web Server

Running PeopleSoft Portal requires a fully functional web server. In this step, configure your web server. Make sure that you also configure your web server for PeopleSoft PeopleBooks so that you can easily refer to the documentation while reviewing the new release.

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

Properties

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

Task 6-1-2: Configuring Portal

Running PeopleSoft Portal requires a fully functional application server domain. The application server was configured earlier in the upgrade. PeopleSoft applications are accessed through the portal. You need to grant users access to complete the upgrade process. You must install and configure the PeopleSoft Portal to complete the upgrade.

Note. If you configured your PeopleSoft Portal earlier in the upgrade, you can skip this step.

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You also must define a password on the Node Definitions page for Single Signon to work properly. If you do not define a password, the sign-on page appears when trying to access a report directly, instead of the report itself. To avoid this issue, follow the procedure below to assign a password.

To assign a password:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Click Search.
3. Select the database's default local node.

   The default local node shows a *Y* in the Default Local Node column.
4. On the Node Definitions page, select *Password* in the Authentication Option field.
5. Enter a password in the Node Password field.
6. Enter the password again in the Confirm Password field.
7. Enter the default user in the Default User ID field.
8. Save the node definition.
9. Reboot the application server and web server.

See the PeopleTools installation guide for your database platform.

Properties

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

Task 6-2: Reapplying Customizations

This section discusses:

- Understanding the Reapplication
- Performing Customized Object Adjustment
- Registering Portal Navigation Objects

Understanding the Reapplication

In this task, you work with your customized objects to ensure that they are properly integrated into your upgraded database.

Task 6-2-1: Performing Customized Object Adjustment

When you reviewed your upgrade compare reports, you decided whether to take the Source or Target version of the objects. If you took the Oracle-delivered version of an object instead of your own customized version, you may need to customize the new objects to get the blend of new standard features and your custom features. In complex cases, this may take several iterations. You need to make manual adjustments to the objects to apply these customizations.

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Once you reapply all of your customizations, you should run the DDDAUDIT, SYSAUDIT, and SYSAUD01 reports to make sure that you did not introduce any problems into your system.

Reapply any Mass Change or EDI customizations.

See “Planning Your Application Upgrade,” Identifying Customizations.

Be aware that you must not overwrite Oracle-loaded data. The customizations, extracted during an earlier step, must be manually applied now.

In another step, you applied the Oracle-delivered record group assignments.

See “Applying Application Changes,” Loading Data for Data Conversion, Importing Record Groups.

If you maintain any custom record group assignments, reapply them to your Copy of Production database now.

During Move to Production passes, you will not need to reapply these customizations. The changes you make now will be copied to any subsequent Copy of Production database using PeopleSoft Data Mover scripts.

Properties

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

Task 6-2-2: Registering Portal Navigation Objects

You must register your customized objects, such as menus and components, to access them in PeopleSoft Portal. You can use the Registration Wizard or the Menu Import process to grant access to the appropriate components. Make sure that you register your components for all of your portals (for example, Customer, Supplier, Employee, and so forth). Also, make sure that you select the node name that matches the database. Do not use the Local node.

See the PeopleTools: PeopleSoft Application Designer Developer’s Guide PeopleBook for your new release, “Using the Registration Wizard.”

See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your new release, “Administering Portals.”

Properties

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

Task 6-3: Setting Up Security

This section discusses:

- Understanding Security
- Performing Security Setup

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- Synchronizing CREF Permissions
- Granting Access to Personalize the Homepage

Understanding Security

In this task you perform steps to set up security, grant access to the user ID, set up permissions lists, and grant access to navigation and homepages.

Task 6-3-1: Performing Security Setup

This section discusses:

- Understanding Security Setup

Understanding Security Setup

Select the PeopleTools, Security folder now to add the new PeopleSoft PeopleTools and application menus, delete old menus, and set up appropriate operator security for your system.

Many menu additions and deletions have occurred. Examine the menu compare report and the Demo database for details of the required security changes, then decide which of your roles and permission lists should have access to each of the new menus.

Many tasks in this chapter instruct you to select a specific menu within the new PeopleSoft release. To perform these tasks, set up appropriate security for each of the menus referenced in each of the tasks.

At this time, you need to review the two security views that are used for Global Security and Row Level Security. The following table lists the naming conventions that have been adopted in the new PeopleSoft HCM release:

List Type	Format
Data Permission	HCDP*XXXXXX* (Where *XXXXXX* can be any specification you choose.)
Component Permission Lists	HCCP*XXYYYY* (Where *XX* is the product code and *YYYY* is any specification you choose.)
Primary Permission Lists	HCPP*XXXXXX* (where *XXXXXX* is any specification you choose.)

If you decide to change your security to use this naming convention, you do not need to take any further action. However, if you do not intend to use the naming convention given above, then you need to modify the WHERE clause in the following two views to reference the naming convention you have decided to follow. The following table lists the views to reference (when modifying the WHERE clause) when using an alternate naming convention:

Security View	Function
OPRDEFN_SCRTY3	Data Permissions (Row Level Security)
OPRDEFN_SCRTY4	Primary Permissions (Global Security)

See the PeopleSoft Applications Portal PeopleBook: Portal and Site Administration for your new release, information on PeopleSoft-delivered security.

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Note. Move to Production: If you changed the user profiles in your production system after you froze your PeopleSoft PeopleTools, you must manually apply the changes to your Copy of Production database before the end of the final Move to Production.

Properties

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

Task 6-3-2: Synchronizing 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 Portal architecture, Portal Registry Structures reference permission lists. At this point, however, the PeopleSoft Portal Registry Structures copied from the Demo database do not reference any permission lists on the Copy of Production database. This synchronization program will match the existing permission lists to the appropriate Registry Structures and update it.

Note. The user ID that invokes this process must have the security role Portal Administrator. Otherwise, the process may terminate abnormally.

Note. Your PeopleSoft Process Scheduler must be running to perform this task.

Running the Portal Security Synchronization Process

Follow the steps below to run the PeopleSoft 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.

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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*, and so on.
13. Review any messages received during the running of this process with your Portal Administrator.

See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your new release.

Note. If the permission lists for your upgrade user do not allow you access to a component, you will encounter this error when running the security synchronization process for that page: `Security synchronization failed for Portal Object.` This error may indicate other problems with the component or folder, but you should check your security first.

Properties

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

Task 6-3-3: Granting Access to Personalize the Homepage

This section discusses:

- Understanding Access to the Portal Homepage
- Updating the Homepage Personalization Permission List
- Adding the Portal User Role

Understanding Access to the Portal Homepage

You must complete this step if you use any of the PeopleSoft Portal Pack products or pagelets. To add, remove, or change the layout of the homepage, you must grant homepage personalization security access to all non-guest users.

Updating the Homepage Personalization Permission List

To update the homepage personalization permission list:

1. Using PeopleSoft Data Mover, sign in to the Target database.
2. Open the PeopleSoft Data Mover script *PS_APP_HOME*\SCRIPTS\PORTAL_HP_PERS.DMS.
3. Run this script against the Target database.
4. Close PeopleSoft Data Mover.

Adding the Portal User Role

To add the Portal User Role to the user IDs:

1. Using PeopleSoft Data Mover, sign in to the Target database.
2. Open the PeopleSoft Data Mover script *PS_APP_HOME*\SCRIPTS\PORTAL_ADD_ROLE.DMS.
3. Run this script against the Target database.

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4. Close PeopleSoft Data Mover.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, manually remove the role PAPP_USER from any GUEST user ID, because a GUEST user should not be personalizing the common homepage.

Properties

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

Task 6-4: Completing Portal Data Conversion

This section discusses:

- Reviewing the Pagelet and Collection Log
- Enabling Pagelet Publishing

Task 6-4-1: Reviewing the Pagelet and Collection Log

This section discusses:

- Correcting Logged Issues
- Running UPGPT846PP Again

This step explains how to correct logged issues for Navigation Collections, Portal Registry objects, and Pagelet Wizard objects.

Note. Perform this step only if there are logged issues that need to be resolved for Navigation Collections, Portal Registry Objects, or Pagelet Wizard objects reported from the UPGPT846PP process.

Correcting Logged Issues

Review the log from running the data conversion UPGPT846PP Application Engine program in the task titled, "Completing the PeopleTools Conversion." Correct the issues from the log using the instructions in the MAIN section comments of the UPGPT846PP program. These instructions were reported in the chapter “Applying PeopleTools Changes” task Converting PeopleTools Objects in the Reporting Conversion Details step.

See “Applying Application Changes,” Completing the PeopleTools Conversion.

See “Applying PeopleTools Changes,” Converting PeopleTools Objects, Reporting Conversion Details.

Running UPGPT846PP Again

In this step, you run the UPGPT846PP process again.

Note. The Application Engine process UPGPT846PP can be run repeatedly, if necessary, as you resolve data issues.

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To run UPGPT846PP again:

1. Run the Application Engine conversion process UPGPT846PP with the upgrade user ID.

   The program can be run from the command line with the following:

   ```
   $PS_HOME\bin\client\winx86\psae -CD dbname  -CT dbtype -CS dbservername -CO ⇒
   oprid -CP oprpswd -R 1  -AI UPGPT846PP
   ```

2. Review the log file according to the instructions in the previous step.
3. If there are any remaining issues, correct them and rerun UPGPT846PP.
4. Repeat steps 2 and 3, if necessary, until there are no remaining issues for Navigation Collections, Portal Registry objects, or Pagelet Wizard objects.

Properties

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

Task 6-4-2: Enabling Pagelet Publishing

This step enables the creation of homepage pagelets for Navigation Collections and Pagelet Wizard. The script name for your upgrade path is:

```
PTPP_PORTAL_PACK.DMS
```

Properties

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

Task 6-5: Updating Department Security

This section discusses:

- Understanding Department Security
- Refreshing Operator Security
- Refreshing Transaction Records

Understanding Department Security

In this task you update the Operator Security Join table and the transaction side Security Join Tables so that they are based on the most current information. You need to run this step whether you use department level security or not.

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Task 6-5-1: Refreshing Operator Security

This process refreshes the Operator Security Join Table. You must run this process whenever a Security Type is modified, when a Security Tree is modified or added, or when a ROWSECCLASS is modified or added.

To refresh the Operator Security Join Table:

1. From your browser, sign on to your Copy of Production database, keeping the default browser address.
2. Select Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL.
3. Click Add a New Value.
4. Enter *UPGR_OPRSECURITY* on the Run Control selection panel and click Add.
5. On the Run Control page, keep all preset defaults for upgrading and click Run.
6. On the Process Scheduler Request page, click OK.
7. Monitor the process from the Process Monitor.
8. Select Set Up HRMS, Security, Core Row Level Security, Refresh SJT_OPR_CLS.
9. Enter *UPGR_OPRSECURITY* on the Run Control selection panel and click Search.
10. On the Run Control page, keep all preset defaults for upgrading and click Run.
11. On the Process Scheduler Request page, click OK.
12. Monitor the process from the Process Monitor

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook,* " Setting Up and Administering HCM Security."

Properties

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

Task 6-5-2: Refreshing Transaction Records

This process updates the transaction side Security Join Tables.

To refresh the transaction side Security Join Tables:

1. From your browser, sign on to your Copy of Production database, keeping the default browser address.
2. Select Set Up HRMS, Security, Core Row Level Security, Refresh Trans SJT Tables.
3. Click Add a New Value.
4. Enter *UPGR_OPRSECURITY* on the Run Control selection panel and click Add.
5. On the Run Control page, keep all preset defaults for upgrading and click Run.
6. On the Process Scheduler Request page, click OK.
7. Monitor the process from the Process Monitor.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook,* " Setting Up and Administering HCM Security."

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Properties

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

Task 6-6: Backing Up Before Manual Changes

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

Properties

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

Task 6-7: Running the GPCE Delete Process

This section discusses:

- Understanding Global Payroll Country Extension Delete Process
- Creating the Rule Delete Package Definition
- Creating the Rule Delete Package
- Preserving Rules Set for Deletion
- Exporting the Rule Delete Package
- Verifying Rule Delete Export Results
- Preparing to Apply the Rule Delete Process
- Importing and Comparing the Rule Delete Package
- Running the Delete Compare Validation Report
- Verifying the Delete Package Compare Report
- Upgrading the Rule Delete Package
- Running Delete Package Upgrade Validation Report
- Verifying the Delete Package Upgrade Report
- Completing the Rule Delete Process
- Finalizing the Rule Delete Process
- Updating Install Options on the Target Database

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- Setting the Store Option for System Elements
- Exporting HR Rate Codes
- Importing HR Rate Codes

Understanding Global Payroll Country Extension Delete Process

In this task you run steps for the PeopleSoft Global Payroll Country Extension (GPCE) delete process.

Task 6-7-1: Creating the Rule Delete Package Definition

In this step, a new rule package definition, UPGDEL, is created. This rule delete package contains all Oracle-delivered elements to be deleted from your Target database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-7-2: Creating the Rule Delete Package

In this step, the new rule package UPGDEL, is created.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-7-3: Preserving Rules Set for Deletion

In this step, you verify and change the elements that are set for deletion.

To verify and change elements to be deleted:

1. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package.
2. On the Find an Existing Value tab, search for UPGRULD.
3. Open the package definition.
4. Select the View Package Tab.

   A list of elements to be deleted appears.
5. If there are any *Oracle-delivered elements* that you do not want to delete, clear the Upgrade check box corresponding to that element.

   See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."
6. Click Save.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-7-4: Exporting the Rule Delete Package

This step exports the new rule package UPGDEL.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-7-5: Verifying Rule Delete Export Results

Verify that the rule delete package exported correctly in the previous step, by checking the message log. Ensure there are no errors in the log.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-7-6: Preparing to Apply the Rule Delete Process

In this step, the Target database is prepared to apply the rule delete package by executing the application engine UPG_GPCEDEL.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-7: Importing and Comparing the Rule Delete Package

In this step, the rule delete package UPGRULD is imported and compared.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-8: Running the Delete Compare Validation Report

In this step, run the Delete Compare Validation report.

The script for your upgrade path is:

```
UVGPX10.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-9: Verifying the Delete Package Compare Report

Verify the Delete Package Compare report generated in the previous step.

If a failure occurs review the following messages:

- Failure, Element does not exist: This indicates that you do not currently have that element in your database. No delete is required. No further action is necessary. The element can be left in failure status.
- Failure, Used in Rule Defn: This indicates that a child element to be deleted is referenced by one or more parent elements in your database. The elements can remain in failure status. The elements will not be deleted in the upgrade package step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-10: Upgrading the Rule Delete Package

In this step, the rule delete package is upgraded.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-11: Running Delete Package Upgrade Validation Report

In this step, run the Delete Package Upgrade Validation Report.

The script for your upgrade is:

```
UVGPX20.SQR
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-12: Verifying the Delete Package Upgrade Report

In this step, verify the Delete Package Upgrade Validation report generated in the previous step.

Verify the count of elements resulting in Error/Warnings is zero (0).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-13: Completing the Rule Delete Process

In this step, the deletion of the rule delete package is complete.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 6-7-14: Finalizing the Rule Delete Process

During the rule delete process, you decided to keep certain elements that were originally delivered by Oracle. In this step, the ownership of those rule elements is transferred to you.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 6-7-15: Updating Install Options on the Target Database

In this step, update the install options for the newly licensed country extensions on your Target database.

Note. Skip this step if you are not licensing *new* Global Payroll Country Extensions.

To update the install options:

1. Select Set Up HRMS, Install, Installation Table.
2. Click the Installed GP Countries link.
3. Select the check boxes corresponding to all the newly licensed Global Payroll Country Extensions.
4. Click OK.
5. Click Save.

Note. An error message will appear. You can ignore the message.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-16: Setting the Store Option for System Elements

In this step, a script selects the store option for system elements depending on which PeopleSoft Global Payroll Country Extensions are installed on your database. Some country extensions require the store option to be selected for certain system elements where the store option is not selected by default.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-7-17: Exporting HR Rate Codes

In this step, the new HR rate code elements referenced by the Global Payroll rate code element, are exported.

The script for your upgrade path is:

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UVHCGPP60E.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Global Payroll All Countries	All	All

Task 6-7-18: Importing HR Rate Codes

In this step, the new HR rate code elements referenced by a Global Payroll rate code element is imported. If the HR rate code present in the source database already exists in your database, this process will *not* override your data.

The script for your upgrade path is:

UVHCGPP60I.DMS

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-8: Upgrading Global Payroll Country Extensions Manually

This section discusses:

- Understanding the Manual Global Payroll Country Extensions Upgrade
- Applying the Licensed Rule Package
- Applying the Unlicensed Rule Package
- Creating the Final Rule Package
- Applying the Final Rule Package Manually
- Applying the Consolidated Non-Rule Package
- Applying Individual Non-Rule Packages
- Creating the Rule Delete Package
- Applying the Rule Delete Package
- Finalizing the Rule Delete Process Manually
- Updating Install Options Manually

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Understanding the Manual Global Payroll Country Extensions Upgrade

In this task, you customize the PeopleSoft Global Payroll Country Extension (GPCE) Rule Packager data you copied into your database earlier in the upgrade. The automated steps in the "Applying Application Changes" chapter have copied the PeopleSoft 9.1 Rule Packager data into your database without customizations. If there are customizations to your Rules that you would like to preserve, complete the manual steps in this task.

Note. Perform this task only if you are upgrading PeopleSoft Global Payroll Country Extensions already installed on your Copy of Production database or newly licensing PeopleSoft Global Payroll Country Extensions. If you do not use PeopleSoft Global Payroll or use only the PeopleSoft Global Payroll core product, you can skip this task.

Oracle uses the convention *XXX* to indicate the three-character country code defined by ISO. To apply these instructions, you have to replace *XXX* with the relevant country code.

The following table lists the country codes of the 17 countries that PeopleSoft Global Payroll supports:

Country Extension	Country Codes (ISO codes)
Australia	AUS
Brazil	BRA
France	FRA
Germany	DEU
Hong Kong	HKG
India	IND
Italy	ITA
Japan	JPN
Malaysia	MYS
Mexico	MEX
Netherlands	NLD
New Zealand	NZL
Singapore	SGP
Spain	ESP
Switzerland	CHE
United Kingdom	GBR
United States	USA

Task 6-8-1: Applying the Licensed Rule Package

This section discusses:

- Importing and Comparing the Licensed Country Extensions Rule Package
- Upgrading the Licensed Country Extension Rule Package

Note. You can skip this step if you are only licensing new country extensions and do not have any country extensions installed on your Copy of Production (Target) database, because you will not have a UPGRULL package.

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Note. Before proceeding with this step, ensure that the Process Scheduler is up and running. Remember to select the Compare Report option while applying UPGRULL.

Importing and Comparing the Licensed Country Extensions Rule Package

The licensed country extensions rule package has to be applied on the Copy of Production (Target) database during the Initial pass.

To import and compare the package:

1. Place the script files of the rule package UPGRULL in the *PS_HOME*/SCRIPTS directory of the Copy of Production (Target) database.

   The script files are:

   ```
   UPGRULL_IMP.DMS
   GP_CLEANUP.DMS
   ```

2. Place the data file UPGRULL_DAT.DAT in the *PS_HOME*/DATA directory of your Copy of Production (Target) database.
3. From your browser, sign in to the Copy of Production (Target) database.
4. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
5. On the Find an Existing Value tab, search for Package ID UPGRULL, and open the package.
6. Select the Package Processing tab and complete the following steps:
   a. Select the Import Packages check box.
   b. For the script location, enter the *PS_HOME*/SCRIPTS directory.
   c. Select the Compare Package check box.
   d. Select the Create Compare Report check box.
   e. Under Compare Processing, select the Update Statistics check box.
   f. Under Compare Report Print Options, select the Errors/Warnings, Modified, and New check boxes.
   g. Under Compare Processing, select the Update Statistics check box.
   h. Click Process.
7. On the Process Monitor page, verify that the process runs to success.
8. Review the Rule Package Compare Report PDF file that was generated for detailed information about which elements are in an error or warning status, and whether an element is being added or modified.

   This is a field-by-field compare report.

   See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."
9. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
10. On the Find an Existing Value tab, search for the Package ID UPGRULL and open the package.
11. All elements with a warning or error message will be sorted to the top of the list.

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You have to fix all the errors and review all the warnings. You can ignore any elements with *Action = Info Only* and the Upgrade check box is cleared and unavailable for selection, as these elements are informational only and will not be upgraded.

The compare process clears the Upgrade option for any elements contained in the PeopleSoft Rule Package with *Action = Upgrade* for which you have taken ownership and you have modified. Therefore you should do the following:

a. Document the modifications you made to the original element.

b. Select the Upgrade option to apply the current PeopleSoft-software settings of the element.

Note. You can ignore any PS Delivered/PS Modified warning messages.

You will reapply the modifications later in the upgrade. These updates are included in the Rule Package you apply during the Move to Production phase.

Note. There are some changes that you can make to Oracle-delivered elements that do not force you to take ownership of the element (as a result, the Upgrade option might still be selected for these elements). Oracle suggests that during this step you review all of the modifications you made to Oracle-delivered elements to determine whether you want to take the updated Oracle-delivered element definitions or retain your element modifications. Review the Upgrade Flags on the Rule Package and set them accordingly.

Upgrading the Licensed Country Extension Rule Package

To upgrade the package:

1. From your browser, sign in to the Copy of Production (Target) database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
3. On the Find an Existing Value tab, search for Package ID UPGRULL and open the package.
4. Select the Package Processing tab.
   a. Select the Upgrade Package check box.
   b. Under Upgrade Processing, select the Update Statistics check box.
   c. Under Continue Upgrade Processing, select With Warnings check box and leave the With Errors check box cleared.
   d. Click Process.
5. On the Process Monitor page, verify that the process runs to success.
6. Click the “Go back to Apply Rule Package” link.
7. On the Find an Existing Value tab, search for the Package ID UPGRULL and open the package.
8. Select the Package Elements tab.
9. Make sure that the first element displays *Success* in the Results column.

   Then scroll down until you see the first element that has the Upgrade check box selected and make sure that the Upgrade Status is *Done*.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-8-2: Applying the Unlicensed Rule Package

The unlicensed country extensions rule package has to be applied on the Copy of Production (Target) database during the Initial Pass.

Note. You can skip this step if you have already licensed all seventeen PeopleSoft Global Payroll Country Extensions in the old release, which means that you do not have any unlicensed country extension to upgrade.

Note. Before proceeding with this step, ensure that the Process Scheduler is up and running. You do not have to run the Compare Report while applying UPGRULU.

To apply the package:

1. Place all the script files of the rule package in the *PS_HOME*/SCRIPTS directory of the Copy of Production (Target) database. The script files are:

   ```
   UPGRULU_IMP.DMS
   GP_CLEANUP.DMS
   ```

2. Place the data file UPGRULU_DAT.DAT of the rule package in the *PS_HOME*/DATA directory of the Copy of Production (Target) database.
3. From your browser, sign in to the Copy of Production (Target) database.
4. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
5. Add the new Package ID *UPGRULU*.
6. Select the Package Processing tab and complete the following steps:
   a. Select the Import Packages check box.
   b. For the script location, enter the *PS_HOME*/SCRIPTS directory.
   c. Select the Compare Package check box.
   d. Leave the Create Compare Report check box cleared.
   e. Under Compare Processing, select the Update Statistics check box.
   f. Select the Upgrade Package check box.
   g. Under Upgrade Processing, select the Update Statistics check box.
   h. Under Continue Upgrade Processing, leave the With Errors check box cleared and select the With Warnings check box.
   i. Click Process.
7. On the Process Monitor page, verify that the job runs to success.

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8. Click the “Go back to Apply Rule Package” link.
9. Search for the Package ID UPGRULU and open the package.
10. Select the Package Elements tab.
11. Make sure that the first element displays *Success* in the Results column.

    Then scroll down until you see the first element that has the Upgrade check box selected and make sure that the Upgrade Status is *Done*.

    See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-8-3: Creating the Final Rule Package

This section discusses:

- Understanding the Final Country Extensions Rule Package
- Applying Element Customizations
- Stamping Modified Rules with a New Version
- Creating and Exporting the Final Country Extensions Rule Package

Understanding the Final Country Extensions Rule Package

In this step, you create the final country extensions rule packages on the upgraded Copy of Production (Source) database. The package will contain all Oracle-delivered as well as customized rule elements for all 17 Global Payroll countries.

Note. If the final country extensions rule package has already been created and exported in a previous Move to Production pass, and no changes to the package are expected in this pass, you do not have to repeat this task. You can reuse the package that was exported in the previous Move to Production pass for application on the Target database.

Applying Element Customizations

In this step, you reapply your element modifications to ensure that they are properly integrated into your upgraded database.

When you reviewed your upgrade compare reports, you had to decide whether to take the Source or Target version of the elements. If you have taken the PeopleSoft-software version of an element over your own modified version, you may need to do some modifications to the new elements to get the blend of new standard features and your custom features. In complex cases, this may take several iterations. You need to make manual adjustments to the elements to apply these modifications.

When you reapply an element modification, it blanks out the corresponding GP_VERSION value on the element (GP_PIN), or the corresponding parent Element Definition record (for example, GP_VARIABLE or GP_FORMULA), or both. In the next task, you will update these blank versions so you can identify the elements where you reapplied modifications.

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Stamping Modified Rules with a New Version

In this step, you stamp the modified rules with a new version. You complete version stamping for all elements that you modified during the previous step. This process updates the GP_VERSION field (on GP_PIN, or the parent Element Definition record, or both) with the updated version.

Note. This step must be repeated for each of your licensed country extensions, any new country extensions that you may have created, and also for All Countries if you have created any elements of your own where Country = ALL so that all your customized elements are stamped appropriately.

To stamp modified rules with the new version:

1. From your browser, sign in to your upgraded Copy of Production (Source) database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Version Stamping.
3. If you are stamping elements for a particular country extension, select *Specific Country* in the Used By field and enter the appropriate country in the Country field.
4. If you are stamping elements you have created or modified where Country = ALL, then select *All Countries* in the Used By field.
5. For the stamp type, select *Blank Version.*
6. In the New Version field, enter *9.10.00.00.*
7. Click the Stamp GP Records button.

   At this time, all elements that do not have a version number will be stamped with version C_9.10.00.00.

   Note. PeopleSoft software elements are always delivered with a version number.

   ---

8. Repeat this set of steps for each of your licensed country extensions, any new country extensions that you may have created, and also for All Countries if you have created any elements where Country = ALL.

Creating and Exporting the Final Country Extensions Rule Package

To define, create, and export the final country extensions rule package:

1. From your browser, sign in to your upgraded Copy of Production (Source) database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package.
3. Under Find an Existing Value, search for Package ID GPCERUL and open the package.
4. Select the Package Processing tab.
5. Select the Create Package, Create Scripts, and Export Package check boxes.
6. For the script location, enter the *PS_HOME*/SCRIPTS directory for the upgraded Copy of Production (Source) Database.
7. Click Process.
8. On the Process Monitor page, wait for the process to run successfully.

   Verify that the program completed with no errors by reviewing the message log. If you encounter any issues or need more information, refer to PeopleBooks.

   See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."

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9. Store the generated script and data files.

   There will be three scripts and one data file generated in the *PS_HOME*/SCRIPTS and the *PS_HOME*/DATA directories respectively.

   They are as follows:

   ```
   GPCERUL_EXP.DMS
   GPCERUL_IMP.DMS
   GP_CLEANUP.DMS
   GPCERUL_DAT.DAT
   ```

   Note. Store the generated script and data files until the final upgrade pass is complete. They will be needed in all the upgrade passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	MTP	Global Payroll All Countries	All	All

Task 6-8-4: Applying the Final Rule Package Manually

The final country extensions rule package GPCERUL has to be applied on the New Copy of Production (Target) database during the Move to Production pass.

Note. You do *not* have to run the Compare Report while applying GPCERUL.

Note. Before proceeding with this step, ensure that the Process Scheduler is up and running.

To apply the final rule package:

1. Place all the script files of the rule package in the *PS_HOME*/SCRIPTS directory of the New Copy of Production (Target) database. The script files are:

   ```
   GPCERUL_IMP.DMS
   GP_CLEANUP.DMS
   ```

2. Place the data file GPCERUL_DAT.DAT of the rule package in the *PS_HOME*/DATA directory of the New Copy of Production (Target) database.
3. From your browser, sign in to the New Copy of Production (Target) database.
4. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
5. Add the new Package ID *GPCERUL*.
6. Select the Package Processing tab and complete the following steps:
   a. Select the Import Packages check box.
   b. For the script location, enter the *PS_HOME*/SCRIPTS directory.
   c. Select the Compare Package check box.

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d. Leave the Create Compare Report check box cleared.

e. Under Compare Processing, select the Update Statistics check box.

f. Select the Upgrade Package check box.

g. Under Upgrade Processing, select the Update Statistics check box.

h. Under Continue Upgrade Processing, leave the With Errors check box cleared and select the With Warnings check box.

i. Click Process.

7. On the Process Monitor page, verify that the job runs successfully.
8. Click the “Go back to Apply Rule Package” link.
9. Search for Package ID GPCERUL and open the package.
10. Select the Package Elements tab.
11. Make sure that the first element displays *Success* in the Results column.

    Then scroll down until you see the first element that has the Upgrade check box selected and make sure that the Upgrade Status is *Done*. If you have issues or need more information, refer to PeopleBooks.

    Note. If there are errors, you will have to fix them and rerun the compare and upgrade process again.

    See *PeopleSoft Global Payroll 9.1 PeopleBook,* "Using the Utilities."

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 6-8-5: Applying the Consolidated Non-Rule Package

This section discusses:

- Preparing to Apply the Consolidated Country Extensions Non-Rule Package
- Importing the Consolidated Country Extensions Non-Rule Package Elements
- Comparing the Consolidated Country Extensions Non-Rule Package Elements
- Importing the Consolidated Country Extensions Non-Rule Package Records
- Upgrading the Consolidated Country Extensions Non-Rule Package

Note. Skip this step if you are only licensing new PeopleSoft Global Payroll Country Extensions and not upgrading any country extensions.

Preparing to Apply the Consolidated Country Extensions Non-Rule Package

Place the stored script and data files associated with the consolidated package in the *PS_HOME*/SCRIPTS and *PS_HOME*/DATA directories of the Target database, respectively. The script and data files required for this step are:

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```
UPGGPCE_ELEMENTS_IMP.DMS
UPGGPCE_RECORDS_IMP.DMS
UPGGPCE_ELEMENTS.DAT
UPGGPCE_RECORDS.DAT
```

Importing the Consolidated Country Extensions Non-Rule Package Elements

To import the consolidated country extensions non-rule package elements:

1. From your browser, sign in to the Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements.
3. Add the Package ID UPGGPCE.
4. Select the Package Records tab.
5. For the script location, enter the *PS_HOME*/SCRIPTS directory of your Target database.
6. Click the Import Package button.
7. On the Process Monitor page, verify that the process runs successfully.

Comparing the Consolidated Country Extensions Non-Rule Package Elements

To compare the consolidated country extensions non-rule package elements:

1. From your browser, sign in to the Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Compare Non-Rule Package.
3. Search for the Package ID UPGGPCE and open the package.
4. Select the Package Elements tab.
5. Click Compare.
6. A message box appears, indicating that the compare process has completed successfully. You can now proceed to import non-rule package records.

Note. You may also get a message box indicating that the package contains no elements. This is not an issue, and you can ignore the message as it is normal for some packages to not have associated elements.

Importing the Consolidated Country Extensions Non-Rule Package Records

To import the consolidated country extensions non-rule package records, do the following:

1. From your browser, sign in to the Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records.
3. Search for Package ID UPGGPCE and open the package.
4. Select the Package Records tab.
5. For the script location, enter the *PS_HOME*/SCRIPTS directory of your Target database.
6. Click the Record Import button.
7. On the Process Monitor page, verify that the process runs successfully.

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Upgrading the Consolidated Country Extensions Non-Rule Package

To upgrade the consolidated country extensions non-rule package:

1. From your browser, sign in to your Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Upgrade Non-Rule Package.
3. Search for the Package ID UPGGPCE and open the package.
4. Select the Package Records tab.
5. Click Upgrade.

   A message box displays “Upgrade Process Completed Successfully.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-8-6: Applying Individual Non-Rule Packages

This section discusses:

- Preparing to Apply Individual Country Extensions Non-Rule Packages
- Importing the Individual Country Extensions Non-Rule Package Elements
- Comparing the Individual Country Extensions Non-Rule Package Elements
- Importing the Individual Country Extensions Non-Rule Package Records
- Upgrading the Individual Country Extensions Non-Rule Package

Note. Skip this step if you are not licensing any new PeopleSoft Global Payroll Country Extensions. This step must be repeated once for each new PeopleSoft Global Payroll Country Extension you are licensing.

Preparing to Apply Individual Country Extensions Non-Rule Packages

Place the stored script and data files associated with the individual country extensions non-rule package in the *PS_HOME*/SCRIPTS and *PS_HOME*/DATA directories of the Target database, respectively. The script and data files required for this step are:

*XXX*SYS_ELEMENTS_IMP.DMS
*XXX*SYS_RECORDS_IMP.DMS
*XXX*SYS_ELEMENTS.DAT
*XXX*SYS_RECORDS.DAT

Importing the Individual Country Extensions Non-Rule Package Elements

To import the individual country extensions non-rule package elements:

1. From your browser, sign in to the Target database.

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2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements.
3. Add a Package ID *XXX*SYS.
4. Select the Package Records tab.
5. For the script location, enter the *PS_HOME*/SCRIPTS directory of your Target database.
6. Click the Import Package button.
7. On the Process Monitor page, verify that the process runs successfully.

Comparing the Individual Country Extensions Non-Rule Package Elements

To compare the individual country extensions non-rule package elements:

1. From your browser, sign in to the Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Compare Non-Rule Package.
3. Search for the Package ID *XXX*SYS and open the package.
4. Select the Package Elements tab.
5. Click Compare.
6. A message box appears indicating that the compare process has completed successfully. You can now proceed to import non-rule package records.

Note. You may also get a message box indicating that the package contains no elements. This is not an issue, and you can ignore the message as it is normal for some packages to not have associated elements.

Importing the Individual Country Extensions Non-Rule Package Records

To import the individual country extensions non-rule package records:

1. From your browser, sign in to the Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records.
3. Search for the Package ID *XXX*SYS and open the package.
4. Select the Package Records tab.
5. For the script location, enter the *PS_HOME*/SCRIPTS directory of your Target database.
6. Click the Record Import button.
7. On the Process Monitor page, verify that the process runs successfully.

Upgrading the Individual Country Extensions Non-Rule Package

To upgrade the individual country extensions non-rule package:

1. From your browser, sign in to your Target database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Upgrade Non-Rule Package.
3. Search for the Package ID *XXX*SYS and open the package.
4. Select the Package Records tab.

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5. Click Upgrade.

   A message box displays “Upgrade Process Completed Successfully.”

6. Repeat these steps for each new PeopleSoft Global Payroll Country Extension you are licensing.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-8-7: Creating the Rule Delete Package

This section discusses:

- Understanding Country Extensions Rule Delete Package
- Creating the Country Extensions Rule Delete Package Definition
- Creating the Country Extensions Rule Delete Package
- Exporting the Country Extensions Rule Delete Package

Note. Before proceeding with this step, ensure that the Process Scheduler is up and running.

Understanding Country Extensions Rule Delete Package

In this step, you create and export your upgrade rule delete package. The rule delete package includes all Oracle-delivered elements to be deleted from your Target database.

Creating the Country Extensions Rule Delete Package Definition

To create the rule delete package definition:

1. Sign in to your Copy of Production (Target) database using Application Designer.
2. Open the Application Engine UPG_GPCEDEL.
3. Run the Application Engine UPG_GPCEDEL from Application Designer using the run control ID *UPGDEL*.

   Note. Be sure that you are using the correct run control ID *UPGDEL*.

The Application Engine will create a package definition called UPGRULD.

Creating the Country Extensions Rule Delete Package

In this step, you create the country extensions rule delete package UPGRULD.

To create the rule delete package:

1. From your browser, sign in to the Copy of Production (Target) Database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package.
3. On the Find an Existing Value tab, search for UPGRULD and open the package definition.

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4. Select the Package Processing tab.
5. Select the Create Package check box.
6. Click Process.
7. On the Process Monitor page, wait for the process to run successfully.
8. Click the “Go back to Create/Export Rule Package” link.
9. On the Find an Existing Value tab, search for the Package ID UPGRULD and open the package.
10. Select the View Package tab.

    You will see a list of elements to be deleted.
11. If there are any Oracle-delivered elements that you do not want to delete, clear the Upgrade check box corresponding to that element. If you have issues or need more information, refer to PeopleBooks.

    See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."

    Note. The elements you want to keep will be owned by you in the new release.
12. Click Save.

Exporting the Country Extensions Rule Delete Package

In this step, you export the country extensions rule delete package UPGRULD.

To create scripts and export the rule delete package:

1. From your browser, sign in to the Copy of Production (Target) Database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package.
3. On the Find an Existing Value tab, search for UPGRULD and open the package definition.
4. Select the Package Processing tab.
5. Select the Create Scripts and Export Package check boxes.
6. For the script location, enter the *PS_HOME*/SCRIPTS directory for the New Release Demo database.
7. Click Process.
8. On the Process Monitor page, wait for the process to run successfully.

    Verify that there are no errors by checking the message log. If you have issues or need more information, refer to PeopleBooks.

    See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."
9. Store the generated script and data files.

    There will be three scripts and one data file generated in the *PS_HOME*/SCRIPTS and *PS_HOME*/DATA directories, respectively. They will be as follows:

    ```
    UPGRULD_EXP.DMS
    UPGRULD_IMP.DMS
    GP_CLEANUP.DMS
    UPGRULD_DAT.DAT
    ```

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Note. Store the generated script and data files until the final upgrade pass is complete. They will be needed in all the upgrade passes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Global Payroll All Countries	All	All

Task 6-8-8: Applying the Rule Delete Package

This section discusses:

- Preparing to Apply the Country Extensions Rule Delete Package
- Importing and Comparing the Country Extensions Rule Delete Package
- Upgrading the Country Extensions Rule Delete Package
- Completing the Rule Delete Process

Preparing to Apply the Country Extensions Rule Delete Package

Before applying the rule delete package, you have to run an Application Engine that prepares your database for rule deletion.

To prepare the database:

1. Sign in to the Target database using PeopleSoft Application Designer.
2. Open the Application Engine UPG_GPCEDEL
3. Run the Application Engine UPG_GPCEDEL from PeopleSoft Application Designer using the run control ID *UPGBGN*.

Note. Be sure that you are using the correct run control ID *UPGBGN*.

Importing and Comparing the Country Extensions Rule Delete Package

The country extensions rule delete package has to be applied on the Copy of Production (Target) database during all the passes.

Note. Before proceeding with this step, ensure that the Process Scheduler is up and running.

To import and compare the package:

1. Place all the script files of the rule package in the *PS_HOME*/SCRIPTS directory of the Copy of Production (Target) database. The script files are:

   ```
   UPGRULD_IMP.DMS
   GP_CLEANUP.DMS
   ```

2. Place the data file UPGRULD_DAT.DAT of the rule package in the *PS_HOME*/DATA directory of the Copy of Production (Target) database.

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3. From the browser, sign in to the Copy of Production (Target) database.
4. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
5. Open the UPGRULD package, as follows:
   - During the Initial pass, search for the UPGRULD package ID that already exists on the Target database and open the package.
   - During the Move to Production pass, add a new package ID UPGRULD and open the package.
6. Select the Package Processing tab and complete the following steps:
   a. Select the Import Packages check box.
   b. For the script location, enter the *PS_HOME*/SCRIPTS directory.
   c. Select the Compare Package check box.
   d. Select the Create Compare Report check box.
   e. Select the Errors/Warnings and Deleted check boxes, and leave the other options under Compare Report Print Options cleared.
   f. Under Compare Processing, select the Update Statistics check box.
   g. Click Process.

   Note. During the Initial pass, a message box will appear with the message "Source and the Target databases are the same for this import/compare/upgrade. The Source and Target databases are the same for the import or compare or upgrade process. Upgrading a package in the database it was created in can result in lost data." Click OK on the message box and continue.

   ---

7. On the Process Monitor page, verify that the job runs successfully.
8. Click the "Go back to Apply Rule Package" link.
9. Search for the Package ID UPGRULD and open the package.
10. Select the Package Elements tab.
11. View the elements with errors or warnings in the Results column.

    Many elements will be in error because they are still connected to other elements or referenced elsewhere. Identify the references to these elements and remove them, or if applicable you may clear the Update check box corresponding to the element to take ownership of the element.

    If a failure occurs, review the following information, make any needed changes, and rerun this step if required.

    - Failure, Element does not exist: This indicates that you do not currently have that element in your database, so no delete is required. No further action is necessary; the element can be left in failure status and the Upgrade check box can be left selected.

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- Failure, Used in Rule Defn: This indicates that a child element that is to be deleted is referenced by one or more parent elements in your database. These parent elements may be your own customized elements or they could be other elements that are included in the delete package. You can use the view element relationships functionality to determine how the child element to be deleted is currently referenced. If you want to proceed with the deletion, go to the parent element definitions and remove references to the child element. This process is known as unhooking. Once elements have been unhooked, compare your country extension delete package again and the compare results should no longer indicate a failure for the relevant child elements. If you do not want the elements to be deleted, no further action is necessary; the elements can remain in failure status and the Upgrade check boxes can be left selected. The elements will not be deleted in the upgrade package step.

  Review the Rule Package Compare Report PDF file that was generated for detailed information about which elements are in an error or warning status, as well as whether an element is being deleted. This is a field-by-field compare report. For more information on errors and warnings, see PeopleBooks.

  See *PeopleSoft Global Payroll 9.1 PeopleBook*, "Using the Utilities."

Note. Make sure the exact same elements are selected to be deleted for the Initial and Move to Production passes.

Note. Repeat the compare process until there are no more errors or you are confident that the errors may be ignored. To run the compare process only, repeat the same steps above, but do *not* select the Import Packages check box and enter the script location.

Upgrading the Country Extensions Rule Delete Package

To upgrade the Country Extensions Rule Delete Package:

1. From your browser, sign in to the Copy of Production (Target) database.
2. Select Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package.
3. Search for the UPGRULD package ID that already exists on the Target database and open the package.
4. Select the Package Processing tab and complete the following steps:
   a. Select the Upgrade Package check box.
   b. Under Upgrade Processing, select the Update Statistics check box.
   c. If you have errors reported during the compare process that you wish to ignore, select the With Errors check box under Compare Upgrade Processing.
   d. Under Continue Upgrade Processing, select the With Warnings check box.
   e. Click Process.
5. On the Process Monitor page, verify that the process runs successfully.
6. Click the “Go back to Apply Rule Package” link.
7. Search for the Package ID UPGRULD and open the package.
8. Select the Package Elements tab.
9. Make sure that the first element that has the Upgrade check box selected displays *Success* in the Results column and the Upgrade Status is *Done*.

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Completing the Rule Delete Process

After applying the rule delete package, you have to run an Application Engine that performs some further modifications on your database that completes the rule delete process. Not running the Application Engine could cause problems on your database.

To complete the rule delete process:

1. Sign in to the Target database using Application Designer.
2. Open the Application Engine UPG_GPCEDEL.
3. Run the Application Engine UPG_GPCEDEL from Application Designer using the run control ID *UPGEND*.

Note. Be sure that you are using the correct run control ID *UPGEND*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-8-9: Finalizing the Rule Delete Process Manually

During the rule delete process, you decided to keep certain elements that were originally delivered by Oracle. In this step, the ownership of those rule elements will be transferred to you. This step should be run in the *final* Move to Production pass only.

Note. Perform this step in the *final* Move to Production pass only.

To finalize the rule delete process:

1. Sign in to the Target database using PeopleSoft Application Designer.
2. Open the Application Engine UPG_GPCEDEL
3. Run the Application Engine UPG_GPCEDEL from Application Designer using the run control ID *UPGFIN*.

Note. Be sure that you are using the correct run control ID *UPGFIN*.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	MTP	Global Payroll All Countries	All	All

Task 6-8-10: Updating Install Options Manually

In this step, you update the install options for the newly licensed PeopleSoft Global Payroll Country Extensions on your Target database.

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Note. Skip this step if you are not licensing any new PeopleSoft Global Payroll Country Extensions.

To update the install options:

1. From your browser, sign in to the Target database.
2. Select Set Up HRMS, Install, Installation Table.
3. Click the Installed GP Countries link.
4. Select the check boxes corresponding to all of the newly licensed Global Payroll Country Extensions.
5. Click OK.
6. Click Save.

Note. You can ignore the message that appears when you click the Save button.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll All Countries	All	All

Task 6-9: Updating Payroll Interface Definitions

This section discusses:

- Understanding Updates to Payroll Interface Definitions
- Running Validate PI Field References Report
- Updating PS Table Definitions
- Updating Field Definition Table
- Updating Instance Table Definitions

Understanding Updates to Payroll Interface Definitions

In this task you perform steps to update the PeopleSoft Payroll Interface Definitions.

Note. Perform this task only if you have PeopleSoft Payroll Interface and currently have field entries that use record (table) names impacted by structural changes in the new PeopleSoft release.

A number of enhancements were made in the new PeopleSoft release that involved record structure changes that may impact PeopleSoft Payroll Interface. Some of your existing PeopleSoft Payroll Interface definitions may not be valid as a result of these changes. You must review your PeopleSoft Payroll Interface definitions and update PS Table, Field Definition Table, and Instance Table, if needed.

Before updating PeopleSoft Payroll Interface definitions, you need to do an analysis of structural changes in the new PeopleSoft release, to properly locate all impacted records and fields.

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Task 6-9-1: Running Validate PI Field References Report

In this step, you run a report that lists all invalid record and field references as a result of new and modified record structures.

To run the Validate PI Field References report:

1. From your browser, sign on to your Copy of Production database, keeping the default browser address.
2. Select Set Up HRMS, Upgrade, Reports, Validate PI Field References.
3. Click Add a New Value.
4. Enter the run control ID *UPG_PI_DEFN*.
5. Click Add.
6. From the Check PI Definitions page, click Run.
7. Analyze the data presented in the report to decide whether any changes to Payroll Interface definitions are needed.

The report has three different sections:

- Invalid references in PS Tables
- PI Field Tbl
- PI Instance Tbl

If the report lists any data in any section, proceed with updating the corresponding definitions in the following steps.

Properties

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

Task 6-9-2: Updating PS Table Definitions

In this step, you update any invalid references in PeopleSoft Tables.

To update PeopleSoft Table Definitions:

1. From your browser, sign on to your Copy of Production database, keeping the default browser address.
2. Select Set Up HRMS, Product Related, Payroll Interface, Interface Controls, PS Tables, Find an Existing Value.
3. Enter a Payroll Interface system ID listed in the PS Tables section of the Validate PI Field References report, if you see any.
4. Click Search.
5. Select Record (Table) Name listed in the PS tables section of the Validate PI Field References report.
6. On the PS Tables page, review and update the Field Details area.
7. Delete the fields from the Field Details of the records where they used to be.

   Then add the fields to the records where they were moved in this release.

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8. Repeat steps 2 through 7 for each record listed in the PS Tables section of the report.

Properties

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

Task 6-9-3: Updating Field Definition Table

In this step, you update any invalid references in the PI Field Definition Table.

To update the Field Definition Table:

1. Select Set Up HRMS, Product Related, Payroll Interface, Interface Controls, Field Definition Table, Find an Existing Value.
2. Enter a Payroll Interface system ID, Payroll Interface field ID, and process type for fields listed in the PI Field Tbl section of the Validate PI Field References report, if you see any.
3. Click Search.
4. On the Interface Field2 page, review and update the field definition.
5. Repeat steps 1 through 4 for each field listed in the PI Field Tbl section of the report.

Properties

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

Task 6-9-4: Updating Instance Table Definitions

In this step, you update any invalid references in the PI Instance Table.

To update Instance Table definitions:

1. Select Set Up HRMS, Product Related, Payroll Interface, Interface Controls, Instance Table, Find an Existing Value.
2. Enter a Payroll Interface system ID and instance ID listed in the PI Instance Tbl section of the Validate PI Field References report, if you see any.
3. Click Search.
4. Review and update the PeopleSoft Record Name and PeopleSoft Field1 Name fields.
5. Repeat steps 1 through 4 for each instance ID listed in the PI Instance Tbl section of the report.

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Properties

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

Task 6-10: Verifying Record and RecordField References

In this step, you run a report that lists any invalid record and record-field references in arrays, writable arrays, and trigger definitions. After records have been upgraded, some of the arrays, writable arrays, or trigger definitions could still be referring to old records or record-fields that no longer exist on the upgraded database. After running the report, you should modify these arrays, writable arrays, and trigger definitions so that they point to appropriate records or record-fields, or remove them completely if no longer needed.

For more information on making these modifications, see the PeopleSoft Global Payroll 9.1 PeopleBook as follows:

- For arrays, see Defining Data Retrieval Elements, Defining Array Elements.
- For triggers, see Setting Up Triggers, Setting Up Trigger Definitions.

To run the invalid record and record-field references report:

1. From your browser, sign on to the Target database.
2. Select Set Up HRMS, Upgrade, Reports, Invalid Rec/Rec-Field Refs.
3. Click Add a New Value.
4. In the Run Control field, enter *UPG_GP_INVALID_REC_FLD_REFS* and click Add.
5. Click Run.
6. On the Process Scheduler Request page, click OK.
7. Review the report and remove any invalid record and record-field references from the arrays, writable arrays, and trigger definitions accordingly.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Core	All	All

Task 6-11: Updating Jobs and Process for GP Packager

This section discusses:

- Understanding Updates for Global Payroll Packager
- Updating Job Definitions for GP Packager

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- Updating the Process Definition for GP Packager

Understanding Updates for Global Payroll Packager

In PeopleSoft 9.0, the SQR Report GP00PK01 has to be run on an NT Process Scheduler. Prior to PeopleSoft 9.0, the PeopleSoft Data Mover processes (GP_EXP, GP_IMP) had to be run on an NT Process Scheduler and this continues to be true. In PeopleSoft 9.0, the delivered job definitions run multiple PeopleSoft Global Payroll Packager processes to streamline the overall process. As a result, the job definitions that contain either the SQR report or the PeopleSoft Data Mover processes have to be scheduled to run on an NT Process Scheduler. You need to update the following definitions for PeopleSoft Global Payroll Packager:

- Job definitions
- Process definition

Task 6-11-1: Updating Job Definitions for GP Packager

The following job definitions need to run on an NT Process Scheduler.

- GPCMPRPT: Rules Package Compare Report
- GPCMPRU: Compare & Upgrade with Report
- GPCRSCTE: Create Package & Scripts & Export
- GPEXP: Export Rule Packages
- GPICMP: Import Rule Package & Compare
- GPICMPRU: Import & Compare & Upgrade with Report
- GPICMPU: Import & Compare & Upgrade
- GPIMP: Import Rule Packages
- GPSCTE: Create Scripts & Export Package

To update the job definitions above to run on an NT Process Scheduler:

1. Select PeopleTools, Process Scheduler, Jobs.
2. Open the page for one of the job definitions listed above.
3. Select the Job Definition Options tab.

   The Server Name field contains the value *PSNT*.
4. For the Server Name field, select the value of the NT Process Scheduler that was set up during your installation
5. Repeat steps 2 through 4 for each of the job definitions listed above.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Core	All	All

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Task 6-11-2: Updating the Process Definition for GP Packager

The process for SQR Report GP00PK01 also needs to have the server name of an NT Process Scheduler.

To update the process definition:

1. Select PeopleTools, Process Scheduler, Processes.
2. Click the Advanced Search link on the Search page.
3. Use the search criteria Process Type = SQR Report and Process Name = GP00PK01, and open the page.
4. Select the Process Definition Options tab.
5. For the Server Name field, select the value of the NT Process Scheduler that was set up during your installation

The PeopleSoft Data Mover processes (GP_EXP and GP_IMP) should continue to have the server name of an NT Process Scheduler.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Global Payroll Core	All	All

Task 6-12: Upgrading Rules

This section discusses:

- Understanding Rules Upgrade
- Customizing Template Built Rules
- Reviewing and Modifying User Exit Rules

Understanding Rules Upgrade

This task applies only if you are upgrading the PeopleSoft HCM Time and Labor product. Many SQL objects may have been modified for performance and functionality enhancements.

Task 6-12-1: Customizing Template Built Rules

This section discusses:

- Understanding Template-Built Rules Customizations
- Customized Template-Built Rules
- Rules Created from Actions and Conditions or SQL Objects

Understanding Template-Built Rules Customizations

In this step you customize your Template-Built Rules as well as review and make changes to rules created from Actions and Conditions or SQL objects. Your Template Built Rules were recompiled earlier in the upgrade.

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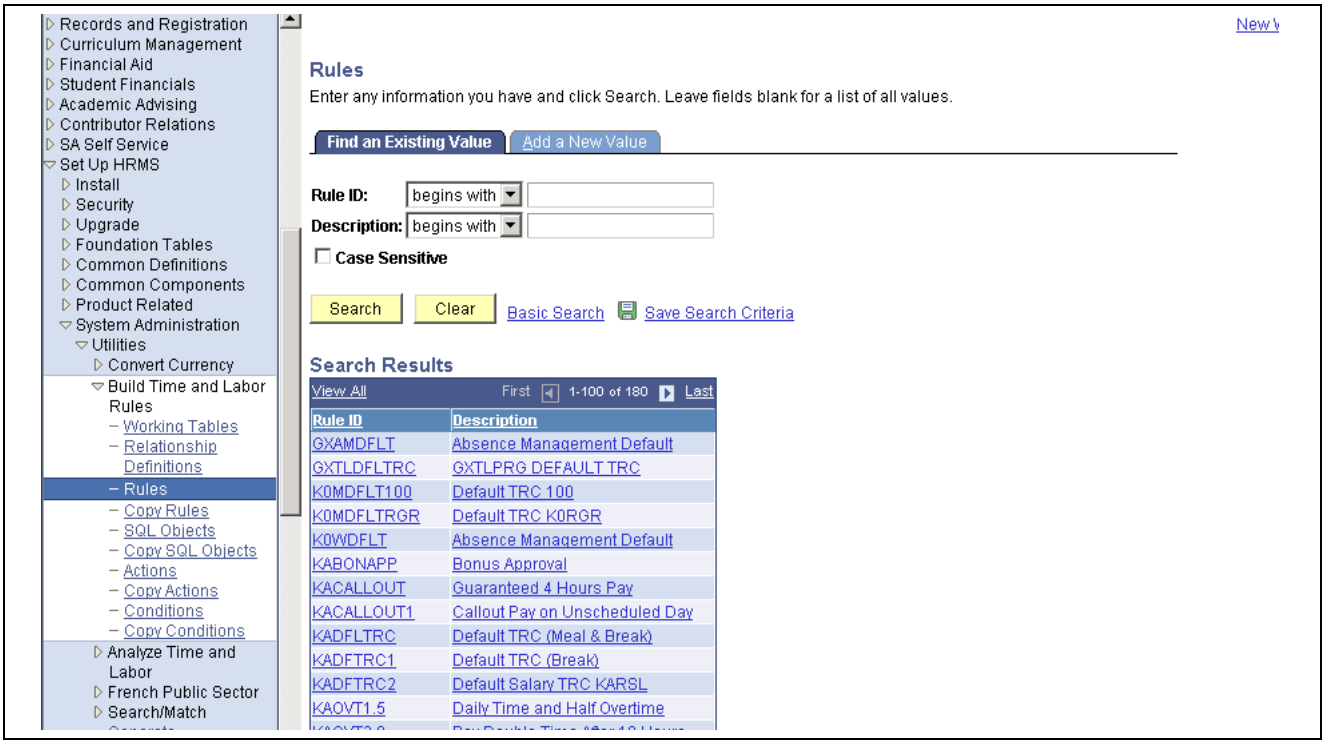
Customized Template-Built Rules

Changes to SQL statements have to be made on the Define Actions, Define Conditions, or SQL Objects pages. To review custom rules, select Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Rules, and enter the first few characters of the rule ID that will follow your naming convention for custom rules, as shown in the following example:



Rules page

Rules Created from Actions and Conditions or SQL Objects

For rules created from Actions and Conditions or SQL objects, you need to review and make necessary changes as mentioned in the Customized Template-Built Rules section above. If you used delivered rules objects (Actions and Condition, SQL Objects, or Temp Tables) in your custom rules without any modifications, you only need to recompile them.

To recompile custom Template-Built rules:

1. Select Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Rules.
2. On the Define Rule Header tab, click the Compile Rule button, as shown in the following example:

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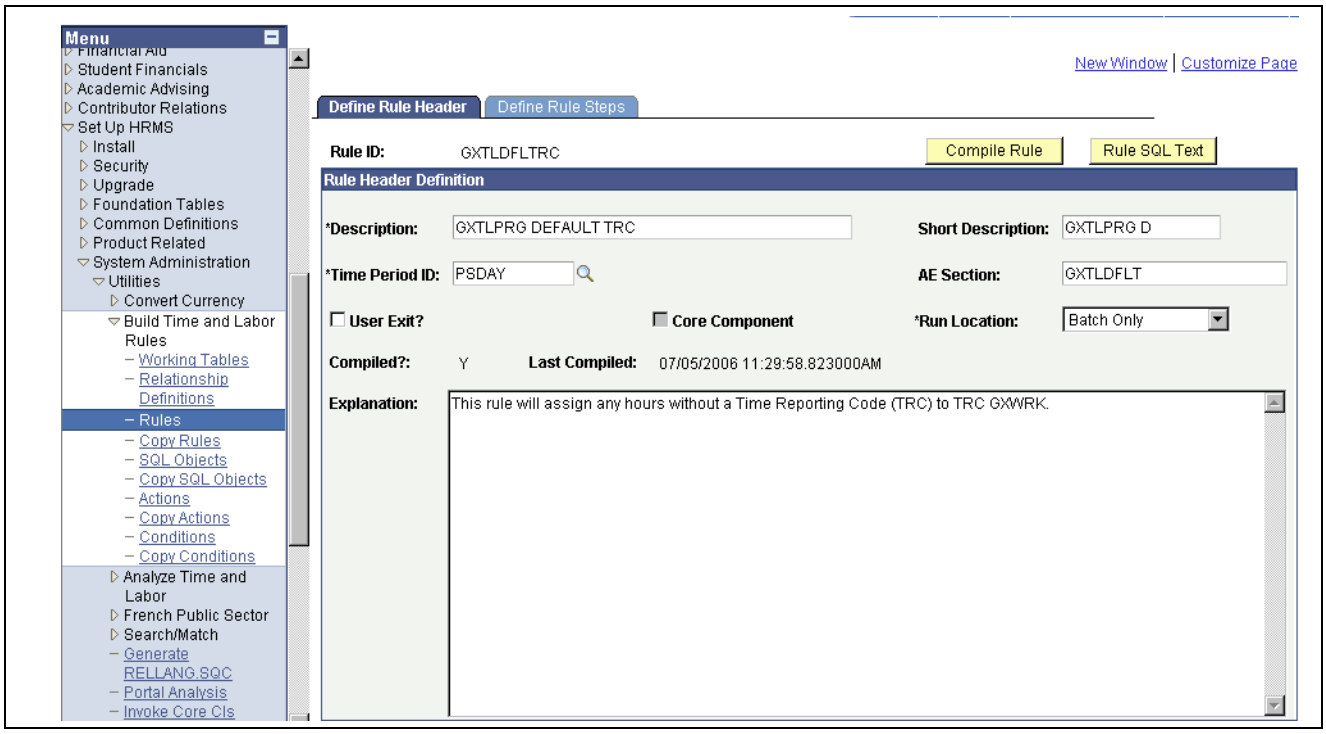

Define Rule Header page

If you have cloned delivered rules objects and modified them to be used in your custom rules, you need to review and modify these custom rules. You will need to either make changes directly in the current rules objects (cloned and modified in your previous PeopleSoft release) or clone PeopleSoft 9.0-delivered rules objects to modify. Then you will need to recompile these rules.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Time and Labor	All	All

Task 6-12-2: Reviewing and Modifying User Exit Rules

If you have created any rules as User-Exits, you need to review and modify them directly in the rules Application Engine library, TL_TA_RULES.

To review and modify User-Exit rules:

1. Launch PeopleSoft Application Designer.
2. Open the Application Engine program TL_TA_RULES.
3. On the Application Engine Definition page, look for the Application Engine section.
4. Modify your SQL steps, as appropriate, to accommodate any changes.
5. Click Save to save the Application Engine section.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Time and Labor	All	All

Task 6-13: Validating EE Garn Payee Data

This section discusses:

- Understanding EE Garn Payee Data Validation
- Running the EE Garn Payee Data Validation Report
- Updating Garn Payee Data

Understanding EE Garn Payee Data Validation

In this task you perform steps to update payee data on garnishment orders, if needed.

Note. Run this task only if you are using PeopleSoft AP Interface and run the Exporting Non-Tax Deductions program.

See Appendix: "Understanding Garnishments Changes."

Task 6-13-1: Running the EE Garn Payee Data Validation Report

In this step, you run a report that lists garnishment orders whose payee has either different invoicing and remitting Vendor ID or multiple locations.

To run the EE Garn Payee Data Validation Report:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Reports, EE Garn Payee Data Validation.
3. Click Add a New Value.
4. Enter the run control ID *UPG_GARN_PAYEE*.
5. Click Add.
6. On the EE Garn Payee Data page, click Run.
7. Analyze the data presented in the report to decide if any input is needed.

The report has four different sections:

- Active orders with different invoicing and remitting Vendor ID.
- Inactive orders with different invoicing and remitting Vendor ID.
- Active orders with multiple locations.
- Inactive orders with multiple locations.

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If there is any active order listed in the report, you are expected to review it and decide if you need to make any changes or not. The active orders have the status Approved or Received and they will continue to be processed after the upgrade. If the payee data is not correct, the Extract Non-Tax Deduction program will not create the invoice correctly or it will not create the invoice at all, depending on your setup.

This report will insert all active orders listed in the report into a new record that will be accessible in the online component. The next step provides instructions for accessing the online component and making the updates.

If there is any inactive order listed in the report, it is up to you to decide whether you want to make any updates to history data or not. Because these orders do not have Approved or Received status, they will not be processed in subsequent pay calculations and leaving them as is will not have any impact on creating the invoices.

The inactive orders will not be automatically inserted and available in the online component. If you decide you want to make the updates to history data, you can access the online component and manually add the orders you want to update. The next step provides instructions for accessing the online component and adding the history records.

This report will run in each upgrade pass, but it will only list the data that you need to review; for example, the initial pass listed 10 active orders, which you have reviewed and updated. The Move to Production passes will list additional orders only if you have created a new order between two passes that matches the report selection criteria; otherwise, it will be empty.

Note. If the final Move to Production pass lists any data in this report and you decide you need updates, you will do the updates directly in Create Garnishments or Payee Table in your production database before you go live.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-13-2: Updating Garn Payee Data

This section discusses:

- Understanding Updating Garn Payee Data
- Updating Active Garnishment Orders
- Updating Garnishment Orders After Final Move to Production Pass
- Adding Inactive Garnishment Orders

Understanding Updating Garn Payee Data

In this step, you update payee data on active garnishment orders, if needed, or add inactive garnishment orders that have payee data you want to update.

Updating Active Garnishment Orders

To update active orders:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Define Defaults, Upgrade EE Garnishment Orders.
3. Select the Upgrade Garn Spec tab.

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4. Review the data and update the Location and Remit Address fields, if needed.
5. Click Save.

There are several things to keep in mind when you are reviewing the data on this page:

- The orders are inserted here because they match certain criteria, but that does not mean the data really needs to be updated. For example, payee XYZ has two locations and two remit addresses. Order ABC has payee XYZ with location 1 and remit address 1, order DEF has payee XYZ with location 2 and remit address 2. Both orders will be listed on this page because their payee has multiple locations, but the location and remit address might be correct for each order. If that is true, you do not have to do anything; the conversion will use the pre-populated data to do updates in the next upgrade pass, but the data will not really change. If you think that order DEF should also have location 1 and/or remit address 1, you should make the update on this page and the conversion programs will use your input to update the data on the garnishment order in the next pass.
- You can only update the Location and Remit Address fields for the orders that are automatically inserted by the validation report onto this page.

  You will get an error message if you try to update any other field in the row.
- You can delete the row on this page, but when you run the report the next time, the validation will find all orders that match the selection criteria and insert the same row again, if it is still applicable.

  The same criteria will most likely still be applicable, unless you have changed the payee setup in the Payee Table between upgrade passes.
- The Used field on this page may have multiple values.

  This field is display only because it keeps track of why data is inserted, whether data passed through conversion, and whether data updated the real garnishment order or not. Review the translate values for this field to see details about each value. The rows created by the first section of the report will have the value *D* in the Used field because they have a payee with different invoicing and remitting vendors. The rows created by the third section of the report will have the value *L* in the Used field because they have a payee with multiple locations.
- If the payee has setup that matches both criteria, it will be listed and inserted into this page only once.

  You will have to ensure your input will correctly update data for both scenarios.
- In the following pass, the Used field will have a different value, depending on whether it actually updated the real order or not.

  The conversion program will update the value of this field to *U* when the orders are updated, which will happen if the Location and Remit Address fields have any values. The conversion program will update the value of this field to *X* when the orders are not updated, which will happen if the Location or Remit Address fields do not have any values.
- The Used field will be very important after running the final upgrade pass.

  If there is any row in the data with the value *D* or *L* in the Used field, you will have to access the garnishment order and do manual updates where applicable, because there will be no more upgrade conversion after the last validation. These entries would be created by the last validation report and most likely would be for the garnishment orders that were newly created in the Copy of Production since the last time you took the copy.

Updating Garnishment Orders After Final Move to Production Pass

To manually update garnishment orders after the final Move to Production pass:

1. Sign on to the Copy of Production database.

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2. Select Payroll for North America, Employee Pay Data <country>, Deductions, Create Garnishments where country is, for example, CAN, USA, or USF.
3. Enter the employee ID and company that needs manual updates.
4. Click Search.
5. If there is more than one garnishment order for the same employee, select the row with the garnishment ID that needs to be manually updated.
6. Select the Garnishment Spec Data 2 tab.
7. Update any of the following fields, as needed: SetID, Vendor ID, Location, Remit Address.
8. Click Save.

Adding Inactive Garnishment Orders

To add inactive orders:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Define Defaults, Upgrade EE Garnishment Orders.
3. Select the Upgrade Garn Spec tab.
4. Click the Add (+) button to insert a new row.
5. Enter values for the fields EmplID, Company, GarnishmentID, SetID, and VendorID from the inactive orders sections of the report for each order you want to update.

   Enter values for the Location and Remit Address fields from the available prompt lists, selecting the correct value for each order you are updating.
6. Click Save.

There are several things to keep in mind when you are adding new data on this page:

- All manually inserted rows will initially have the value *O* in the Used field, marking them as online entry.
- The system will not prevent you from entering any combination of data on this page.

  It does not check whether you are entering only inactive orders. It is your responsibility to decide what updates you are making and add corresponding data on this page.
- In the following pass, the Used field will get a different value, depending on whether it actually updated the real order or not.

  The conversion program will update the value of this field to *U* when the orders are updated, which will happen if the Location and Remit Address fields have any values. The conversion program will update the value of this field to *X* when the orders are not updated, which will happen if the Location or Remit Address fields do not have any values.
- The Used field will be very important after running the final upgrade pass.

  If there is any row in the data with the value *O* in the Used field, you will have to access the garnishment order and do manual updates where applicable, because there will be no more upgrade conversion after the last validation. Follow the above instructions on how to access the garnishment order and fix the data manually.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-14: Setting Up US Custom Garnishment Rules

This section discusses:

- Understanding US Custom Garnishment Rules Setup
- Creating US Custom Garnishment Rules
- Cloning US Custom Garnishment Rules

Understanding US Custom Garnishment Rules Setup

In this task you set up U.S. garnishment rules.

Note. Run this task only if you used to maintain any U.S. garnishment rules in prior releases, and you have decided that you will still need them after the upgrade.

In the new PeopleSoft release, there are two ways to set up garnishment rules:

- Create the U.S. custom rules by entering the data in the online component.
- Clone one of the existing rules and save it as a new custom rule.

In an ideal situation, manual setup of custom rules should be done only during the Initial pass. However, it is possible due to timing of the upgrade passes, that you have added more custom rules since the last pass. You can compare the US Custom Garnishment Rules Audit report from the previous and the current pass to see whether any custom rules have been added since the previous pass. If there are some new rules, and you decide you need them in the future, you can set them up during the Move To Production Pass, but this applies only to any new rules. The rules you have already set up in prior passes will be copied during the upgrade by running the export and import scripts for U.S. custom garnishment rules.

See Appendix: "Understanding Garnishments Changes."

See "Preparing Your Database for Upgrade," Running Application Audits, Running Upgrade Reports, Running US Custom Garnishment Rules Audit.

See Validating EE Garn Rule Data.

See "Apply Application Changes," Completing Application Processes, Exporting US Custom Garnishment Rules and Importing US Custom Garnishment Rules.

See *PeopleSoft Payroll for North America 9.1 PeopleBook.*

Task 6-14-1: Creating US Custom Garnishment Rules

In this step you create new garnishment rules by using the online component to enter the required data.

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To create a U.S. custom garnishment rule:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Product Related, Payroll for North America, Garnishments, Rules Table.
3. Click Add a New Value.
4. Enter values in the Law Source and Rule ID fields for the rule that you want to create.
5. Click Add.
6. Enter all required data on each tab of the component.

   You can use the U.S. Custom Garnishment Rule Audit report to find out what values you need to enter.
7. Click Save.
8. Repeat steps 3 through 7 for each U.S. garnishment rule that you need to set up.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-14-2: Cloning US Custom Garnishment Rules

In this step, you create a new garnishment rule by cloning an existing garnishment rule.

To clone any existing rule as new custom rule:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Product Related, Payroll for North America, Garnishments, Clone Rules.
3. Click Add a New Value.
4. Enter the run control ID *UPG_CLONE*.
5. Click Add.
6. Enter values in the Law Source, RuleID, and Effective Date fields for the rule you want to clone.
7. Enter values in the Law Source, Rule ID, and Effective Date fields for the new rule you want to create.
8. If you want to create more than one rule, insert a new row in the New Garnishment Rule group box.
9. Repeat steps 7 and 8 for each rule you want to create.
10. Click Run.

There are several things to keep in mind when cloning existing rules:

- You can repeat the cloning process many times, using different rules to create as many new rules as you want.
- The new rules will be exactly the same as the rule used for cloning, except for the values in the Source Law, Rule ID, and Effective Date fields, which you entered on the run control page of the cloning process.
- You should try to find the rule that has the same formula as you need in your new rule.

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If there is no rule with the identical formula, you can find a rule with the most similar formula and use it for cloning.

- After the rules are cloned, you can access the Garnishment Rules Tables and modify any of the cloned values.

  For example, you can update the formula steps by deleting old or adding new steps, or update exemption variables or any other field that you want to change.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-15: Validating EE Garn Rule Data

This section discusses:

- Understanding EE Garn Rule Data Validation
- Running the EE Garn Rule Data Validation Report
- Updating Garn Rule Data

Understanding EE Garn Rule Data Validation

In this task, you perform steps to review and update rule data on garnishments orders, if needed.

The purpose of this task is to find all orders that reference rules that do not exist in garnishment rules tables, because you might have some U.S. custom rules that you do not need. However, this task will not only check orders for U.S. custom rules, it will check orders for any rule that might not be defined in garnishment rules tables. We recommend that you run this task to check the validity of your data even if you do not have any U.S. custom rules.

See Appendix: “Understanding Garnishments Changes.”

See Setting Up US Custom Garnishment Rules.

See “Apply Application Changes,” Completing Application Processes, Exporting US Custom Garnishment Rules and Importing US Custom Garnishment Rules.

Task 6-15-1: Running the EE Garn Rule Data Validation Report

In this step, you run a report that lists garnishment orders whose rules do not exist in Garnishment Rules Tables.

To run the EE Garn Rule Data Validation Report:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Reports, EE Garn Rule Data Validation.
3. Click Add a New Value.

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4. Enter the run control ID *UPG_GARN_RULE*.
5. Click Add.
6. On the EE Garn Rule Data page, click Run.
7. Analyze the data presented in the report to decide how you will correct the data.

The report has two different sections:

- Active orders with rules missing in Garnishments Rules Tables.
- Inactive orders with rules missing in Garnishments Rules Tables.

After reviewing the report, you can decide how to fix the data depending on what type of rule is missing.

If the rule is a U.S. custom garnishment rule, you have the following two options:

- You can create the missing rule in Garnishments Rules Tables by following the instructions in Setting Up US Custom Garnishment Rules.
- You can update garnishments orders and replace the missing rule with the existing rule by following the instructions in the step below.

If the rule is a Canadian custom garnishment rule, you have following two options:

- You can create the missing rule in Garnishments Rules Tables CAN, which must be done in the Copy of Production before the tables are renamed.

  This way the Canadian custom rules will be copied during the conversion from renamed tables into a new structure of garnishments rules tables.
- You can update garnishments orders and replace the missing rule with the existing rule by following the instructions in the step below.

If there is any active order listed in the report, it is expected that you will fix the data using one of the above options. The active orders have the status Approved or Received. They will continue to be processed after the upgrade. If the rule is not defined in Garnishment Rules Tables, the pay calculation program will issue an error for the employee.

This report will insert all active orders listed in the report into a new record that will be accessible in the online component. The next step provides instructions for accessing the online component and making the updates. If you are planning to create the missing rule, simply ignore the entries created by the report.

If there is any inactive order listed in the report, it is up to you to decide whether you want to make any updates to history data or not. Because these orders do not have Approved or Received status, they will not be processed in following pay calculations, and leaving them as is will not have any impact on payroll calculations.

The inactive orders will not be automatically inserted and available in the online component. If you decide that you want to make updates to history data, you can access the online component and manually add the orders you want to update. The next step provides instructions for how to access the online component and add the history records. If you decide to create the missing rule, do not add any history rows into the online component.

This report will run in each upgrade pass, but it will only list the data that you need to review; for example, the initial pass listed 10 active orders, which you have reviewed and updated. The Move to Production passes will list additional orders only if you have created a new order between two passes that matches the report selection criteria; otherwise, it will be empty.

Note. If the final Move to Production pass lists any data in this report and you decide you need updates, you will do the updates directly in Create Garnishments, Garnishments Rules Tables, or Garnishments Rules Tables CAN in your production database before you go live.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-15-2: Updating Garn Rule Data

This section discusses:

- Understanding Updating Garn Rule Data
- Updating Active Garnishment Orders
- Updating Garnishment Orders After Final Move to Production Pass
- Adding Inactive Garnishment Orders

Understanding Updating Garn Rule Data

In this step, you update Garn Rule Data on active garnishments orders, if needed, or add inactive garnishment orders that have Garn Rule data that you want to update.

Updating Active Garnishment Orders

To update active orders:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Define Defaults, Upgrade EE Garnishment Orders.
3. Select the Upgrade Garn Rule tab.
4. Review the data and select values in the New Law Source and New Rule ID fields from the available prompt lists, selecting the correct value for each order you are updating.
5. Click Save.

There are several things to keep in mind when you are reviewing the data on this page:

- The orders are inserted here because they match certain criteria, but that does not mean you have to update the order and change the rule.

  You can add the missing rule into Garnishment Rules Tables and ignore the entries listed in this page. If you do not provide new values for the law source and rule ID, the conversion will not make any updates in the next pass.

- You can only update the New Law Source and New Rule ID fields for the orders that are automatically inserted by the validation report onto this page.

  You will get an error message if you are trying to update any other field in the row.

- You can delete the row in this page, but when you run the report the next time, the validation will find all orders that match the selection criteria and insert the same row again, if it is still applicable.

  The same criteria will most likely still be applicable, unless you have created the rule in Garnishments Rules Tables between upgrade passes.

- The Used field on this page may have multiple values.

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This field is display only because it keeps track of why data is inserted, whether data passed through conversion, and whether data updated the real garnishment order or not. Review translate values for this field to see details about each value. The rows created by the first section of the report will have the value *M* in the Used field.

- In the following pass, the Used field will have a different value, depending on whether it actually updated the real order or not.

  The conversion program will update the value of this field to *U* when the orders are updated, which will happen if the New Law Source and New Rule ID fields have any values. The conversion program will update the value of this field to *X* when the orders are not updated, which will happen if the New Law Source and New Rule ID fields do not have any values.

- The Used field will be very important after running the final upgrade pass.

  If there is any row in the data with the value *M* in the Used field, you will have to access the garnishment order and do manual updates where applicable, because there will be no more upgrade conversion after the last validation. These entries would be created by the last validation report and most likely would be for the garnishment orders that were newly created in the last Copy of Production since the last time you took the copy.

Updating Garnishment Orders After Final Move to Production Pass

To manually update garnishment orders after the final Move To Production pass:

1. Sign on to the Copy of Production database.
2. Select Payroll for North America, Employee Pay Data <country>, Deductions, Create Garnishments where <country> is, for example, CAN, USA, or USF.
3. Enter the employee ID and company that needs manual updates.
4. Click Search.
5. If there is more than one garnishment order for the same employee, select the row with the garnishment ID that needs to be manually updated.
6. Select the Garnishment Spec Data 6 tab.
7. If there is more than one assignment applicable to this garnishment, select the row with the rule that needs to be manually updated.
8. Update the following fields, as needed: Law Source, Rule ID.
9. Click Save.

Adding Inactive Garnishment Orders

To add inactive orders:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Define Defaults, Upgrade EE Garnishment Orders.
3. Select the Upgrade Garn Rule tab.
4. Click the Add (+) button to insert a new row.
5. Enter EmplID, Company, GarnishmentID, Law Source, and RuleID from the Inactive Orders section of the report for each order you want to update.

   Enter values in the New Law Source and New Rule ID fields from the available prompt lists, selecting the correct value for each order you are updating.

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6. Click Save.

There are several things to keep in mind when you are adding new data on this page:

- All manually inserted rows will initially have the value *O* in the Used field, marking them as online entry.
- The system will not prevent you from entering any combination of data on this page.

  It does not check whether you are entering only inactive orders. It is your responsibility to decide what updates you are making and add corresponding data on this page.
- In the following pass, the Used field will have a different value, depending on whether it actually updated the real order or not.

  The conversion program will update the value of this field to *U* when the orders are updated, which will happen if the New Law Source and New Rule ID fields have any values. The conversion program will update the value of this field to *X* when the orders are not updated, which will happen if the New Law Source or New Rule ID fields do not have any values.
- The Used field will be very important after running the final upgrade pass.

  If there is any row in the data with the value *O* in the Used field, you will have to access the garnishment order and do manual updates where applicable, because there will be no more upgrade conversion after the last validation. Follow the above instructions on how to access the garnishment order and fix the data manually.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-16: Setting Up Retro Pay Trigger Data

This section discusses:

- Understanding Retro Pay Trigger Data
- Reviewing Retro Pay Monitored Fields
- Setting Up Retro Pay Trigger Values
- Setting Up Retro Pay Trigger Programs

Understanding Retro Pay Trigger Data

In this task, you will set up the retro pay trigger programs that are assigned to the pay groups later in the upgrade. Complete all the steps in this task to complete the set up of the trigger data.

Note. Complete this task *only* if you are planning to use the retro pay functionality.

See *PeopleSoft Payroll for North America 9.1 PeopleBook,* "Processing Retro Pay."

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Task 6-16-1: Reviewing Retro Pay Monitored Fields

Review the retro pay monitored fields. Retro pay monitored fields are delivered with the new release. However, you must review the fields and make updates if necessary.

To review and update retro pay monitored fields:

1. Select Set Up HRMS, Product Related, Payroll for North America, Retroactive Payroll, Retro Pay Monitored Fields.
2. Select *ADDL_PAY_DATA* record from the search dialog.
3. Click Search.
4. Review the list of fields and add/remove any fields as required.
5. Save the page.
6. Repeat these steps for JOB records.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Payroll for North America	All	All

Task 6-16-2: Setting Up Retro Pay Trigger Values

In this step, you will set up retro pay trigger values.

You will need to set up at least one retro pay trigger value for each record: one for JOB and one for ADDL_PAY_DATA. The Retro Pay Trigger Value ID can be different for each record or it can be the same for both records.

To create retro pay trigger values:

1. Select Set Up HRMS, Product Related, Payroll for North America, Retroactive Payroll, Retro Pay Trigger Values.
2. Select Add a New Value at the Search dialog.
3. Specify a new Retro Pay Trigger Value ID. Select either JOB or ADDL_PAY_DATA record names.
4. Click Add.
5. Enter an effective date and description.
6. Enter field details as required in the Retro Pay Trigger Fields scroll area.

   If the JOB record was selected, available fields are from the JOB record. In this case, enter field name and select the Dependent on Field Value check box if the trigger is dependent on the field value. This opens a grid for entering field values.

   If the ADDL_PAY_DATA record was selected, available fields are from the ADDL_PAY_DATA record. In this case, enter either specific earnings codes or select the All Earnings Code check box. Enter the field name and select the Dependent on Field Value check box if the trigger is dependent on the field value. This opens a grid for entering field values.

   If needed, click the Add (+) button to insert a row to the Retro Pay Trigger Fields grid.

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7. Save the page.
8. Repeat the steps for every new retro pay trigger value.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Payroll for North America	All	All

Task 6-16-3: Setting Up Retro Pay Trigger Programs

In this step, you will set up retro pay trigger programs.

To set up retro pay trigger programs:

1. Select Set Up HRMS, Product Related, Payroll for North America, Retroactive Payroll, Retro Pay Trigger Program.
2. Select Add a New Value at the search dialog.
3. Specify a new Retro Pay Trigger Program ID.
4. Click Add.
5. Enter an effective date and description.
6. Enter retro pay trigger details as required in the Retro Pay Trigger Records grid:
   a. Select a Record Name value (either JOB or ADDL_PAY_DATA).
   b. Select Trigger Level.

      The default trigger level is Record. If you leave the trigger level as Record, all fields on that record will be trigger. If you select Field as the trigger level, you have to select a Retro Pay Trigger Value ID.

   c. Click the Add (+) button to add a row to the Retro Pay Trigger Records grid to add a second record if needed. Complete the steps above for the new record.
7. Save the page.
8. Repeat the steps for each new retro pay trigger program ID.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Payroll for North America	All	All

Task 6-17: Validating Pay Group Retro Setup

This section discusses:

- Understanding Pay Group Retro Setup

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- Running the Validate Pay Group Retro Setup Report
- Updating Pay Group Retro Data

Understanding Pay Group Retro Setup

In this task, you update the pay groups with the retro pay trigger program ID. In the new release, retro pay will not be calculated correctly if the retro pay trigger data is not set up and the retro pay trigger program ID is not assigned to the pay group.

Note. Complete this task only if you are planning to use the retro pay functionality.

See *PeopleSoft Payroll for North America 9.1 PeopleBook*, "Processing Retro Pay."

Task 6-17-1: Running the Validate Pay Group Retro Setup Report

In this step, run the Validate Pay Group Retro Setup report to list all pay groups that have retro pay program IDs defined but do not have retro pay trigger program IDs defined.

To run the Validate Pay Group Retro Setup Report:

1. Select Set Up HRMS, Upgrade, Reports, Validate Pay Group Retro Setup.
2. Click Add a New Value.
3. Enter the run control ID *UPG_RETRO*.
4. Click Add.
5. From the Validate Pay Group Retro Setup page, click Run.
6. Analyze the data presented in the report to decide if any changes to the pay groups are needed.

The Pay Group table is effective dated, but this report ignores effective dates and lists each pay group that matches selection criteria only once.

This report inserts all pay groups listed in the report into a new record, UPG_PYGRP_RETRO, that is accessible in the online component Pay Group Retro Trigger Program. The next step provides instruction for accessing the online component and making the updates. This report is run in each upgrade pass, but only lists the data that you need to review in each pass. For example, the Initial pass may list ten pay groups without retro pay trigger program IDs, which you have reviewed and updated. The Move to Production passes list additional pay groups only if you have created a new pay group between the two passes that match report selection criteria. If you did not create new pay groups, the report run in the Move to Production pass will be empty.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-17-2: Updating Pay Group Retro Data

This section discusses:

- Assigning the Retro Pay Trigger Program ID

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- Updating Pay Group After Final Move to Production Pass

Note. Updates to the Pay Group Table must be completed before you run first payroll calculations that involve retro payroll functionality. If you do not have too many pay groups, you can update the Pay Group Table after the upgrade is complete.

Assigning the Retro Pay Trigger Program ID

To assign the retroactive pay trigger program ID to the pay group:

1. Select Set Up HRMS, Upgrade, Define Defaults, Pay Group Retro Trigger Program.
2. Review the data and update retro pay trigger program IDs where needed.
3. Click Save.

There are several things to keep in mind when you are reviewing the data on this page:

- The pay group listed here has a retro pay program ID defined. This implies the pay group was set up to use retro pay functionality in the previous release. To continue to use retro pay functionality in the new release, you must add retro pay trigger program IDs to the pay group.
- The pay group may have multiple effective dated rows, however, not all the effective dated rows may have retro pay program IDs defined. The Validate Pay Group Retro Setup report lists pay groups and inserts data into the online component only once. However, when you assign retro pay trigger program IDs to the pay group during the upgrade, all effective dated rows that have a retro pay program ID defined are updated with the retro pay trigger program ID to avoid save errors in the future updates on the Pay Group Table.
- The Pay Group Retro Update Status field on this page may have multiple values. This field is display only. It is updated by different tasks through the upgrade process. The Validate Pay Group Retro Setup reports sets this field to *Created*. The Data Conversion sets this field to *Updated* for each pay group that was updated by the retro pay trigger program ID you have assigned here. The Data Conversion sets this field to *Not Updated* for each pay group that was not updated because you did not assign retro pay trigger program ID here.
- If you click Update Pay Group Now the Data Conversion for the Pay Group table will run. This avoids any delay between upgrade passes.

  Data Conversion in the Initial pass does not make any updates to the Pay Group Table because the set up needed for the conversion is done later in the upgrade process. If you are planning to test new retro pay functionality to run retro pay calculation after the Initial pass, you may invoke updates in the Initial pass by clicking Upgrade Pay Group Now. If you have no plans to test this functionality after the Initial pass it is recommended that you update pay groups through the Data Conversion in the Move to Production passes.

  The Data Conversion in Move to Production passes will use data set up done in the previous passes to update the Pay Group Table. If you click Upgrade Pay Group Now you invoke the Data Conversion again. Use of the Upgrade Pay Group Now button in the Move to Production passes is necessary if there are changes in listed pay groups and/or their association with retro pay trigger program IDs. If there are no changes, the Data Conversion will do exactly the same thing. Even though it will not cause any problems it is an extra step and should be avoided.

  If there are changes in the listed pay groups and/or their association with retro pay trigger program ID during the final Move to Production pass we recommend using the Update Pay Group Now button. There are no more Data Conversion processes at this point. If you want to make additional updates to the Pay Group Table, you either have to click the button or update the Pay Group Table after the final Move to Production is completed.

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Updating Pay Group After Final Move to Production Pass

To update the Pay Group Table after the final Move to Production pass:

1. Select Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table.
2. Enter the Company and Pay Group you want to update.
3. Select Correct History.
4. Click Search.
5. Select the Calc Parameters tab.
6. Enter Retro Pay Trigger Program ID.
7. Repeat the previous step for all effective dated rows that have a retro pay program defined.
8. Click Save.
9. Repeat for each pay group that needs to be updated.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-18: Validating Budget Actuals

In this task, you run a report listing Budget Actuals data after the data conversion. The report has three sections:

- Budget Actuals Encumbrance – Converted
- Budget Actuals Pre-Encumbrance – Converted
- Budget Actuals Requisition – Not Converted

Depending on your data, some sections of the report may be blank. The first two sections (Budget Actuals Encumbrance and Budget Actuals Pre-Encumbrance) list all encumbrance and pre-encumbrance data that were converted from the Budget Actuals table record structure to the new Budget Actuals table record structure. The last section lists the requisition data you used in your previous release. The requisition data is not converted because it is obsolete in the new PeopleSoft release.

To run the Budget Actuals Valdiation report:

1. Sign on to the Copy of Production database.
2. Select Set Up HRMS, Upgrade, Reports, Budget Actuals Validation.
3. Click Add a New Value.
4. Enter the run control ID UPG_BUDACT.
5. Click Add.
6. From the Budget Actuals Validation page, click Run.

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7. Analyze the data presented in the report.

Note. Complete this task only if you use PeopleSoft Commitment Accounting.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-19: Running the Encumbrance Process

Once the conversion of the Budget Actuals table is complete, you must run the batch encumbrance process for all companies for the current remaining fiscal year period. You have to review and correct all encumbrance error messages and then initiate the encumbrance General Ledger interface process. By completing this process, the system will be able to build all necessary references that link the Budget Actuals record with the Doc ID Cross Reference, Doc ID Summary, and Doc ID Archive records.

Note. Complete this task *only* if you use the Commitment Accounting Encumbrance Process.

See Also

PeopleSoft HR 9.1 PeopleBook: Manage Commitment Accounting.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Payroll for North America	All	All

Task 6-20: Reapplying Absence Management Direct Reports UI

In the new release, Absence Management uses the Direct Reports UI. Absence information was previously defined by selecting Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup and modifying the following components:

- GP_ABS_SSMGR_BAL_L
- GP_ABS_SSMGR_HIS_L
- GP_SS_MGR_ABS_L

Now, you define this information in the Configure Direct Reports UI page by modifying the following components:

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- GP_ABS_MGRSS_BAL
- GP_ABS_MGRSS_HIST
- GP_ABS_MGRSS_REQ

To make changes to the delivered Direct Reports UI configuration:

1. Select Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI.
2. Click the Configure button to modify any of the following components:
   - GP_ABS_MGRSS_BAL
   - GP_ABS_MGRSS_HIST
   - GP_ABS_MGRSS_REQ
3. Make the appropriate configuration changes.
4. Click Save.

Properties

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

Task 6-21: Updating the Employee ID Length

Following data conversion, you will need to review the EMPLID Field Length value in your new release before you use any transaction that creates new employee IDs. This field is used by the process that automatically generates new employee ID values. You should verify that the displayed value is equal to or greater than the length you have used for employee IDs in your previous release.

To review the EMPLID Field Length value:

1. Select Set Up HRMS, Install, Installation Table.
2. Select the Product Specific tab to access the Product Specific page, as shown in the following example:

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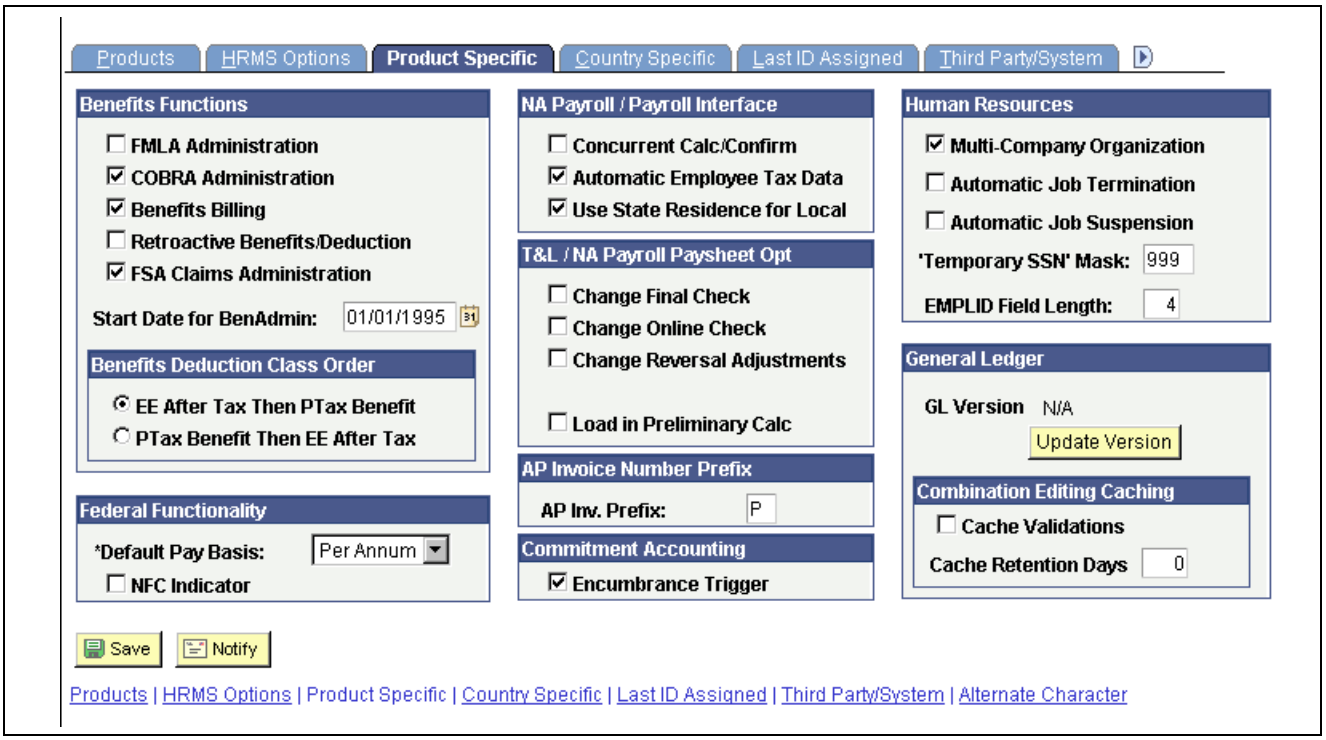

Product Specific tab

3. Update the EMPLID Field Length value, as needed
4. Click the Save button.

Note. You must restart the application server for any changed settings to take effect.

Properties

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

Task 6-22: Reviewing Recruiting Solutions

This section discusses:

- Reviewing Recruiting Solutions Table Definitions
- Reviewing Recruiting Solutions Saved Searches
- Reviewing Recruiting Solutions Interviews
- Reviewing Resume and Job Opening Template Sections
- Reviewing Answers to Screening Questions
- Reviewing Attachment URLs

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Task 6-22-1: Reviewing Recruiting Solutions Table Definitions

During the PeopleSoft Recruiting Solutions upgrade, some data cannot be upgraded into the new release. There is no action for you to take, as this data cannot fit into the new PeopleSoft Recruiting Solutions model. Some of these tables contain related language data. The following tables are affected:

- HRS_APP_ACM_LNG
- HRS_APP_CEV_LNG
- HRS_APP_SCH_LNG

Applicant, Job Opening, and Screening data structures for Competencies, Accomplishments, and School Education have been changed in the new PeopleSoft release to more closely align with Profile Management structures. The table below indicates where the data is converted to in the new PeopleSoft release. As part of the upgrade, the new data is converted to fit the delivered Profile Management Primary Person Profile Type of 'PERSON'. If you plan to use another profile type as your Primary Person Profile Type or you wish to change the structure of the delivered 'PERSON' Person Profile Type, you may need to review the upgrade scripts for the following tables.

This table indicates where the data is converted in the new PeopleSoft release:

Previous Release Information	New Release Information	Profile Type
Job Opening Competencies HRS_JO_COMP	HRS_JO_ITEMS	'PERSON'
Job Opening Accomplishments HRS_JO_ACMP	HRS_JO_ITEMS	'PERSON'
Applicant Competencies HRS_APP_CMP HRS_APP_CM_EVAL	HRS_APP_ITEMS	'PERSON'
Applicant Accomplishments HRS_APP_ACMP	HRS_APP_ITEMS	'PERSON'
Applicant School Education HRS_APP_SCHL HRS_APP_AREASDY	HRS_APP_ITEMS	'PERSON'
Job Opening Competencies History HRS_JO_CMP_HST	HRS_JOITEMSHST	'PERSON'
Job Opening Accomplishments History HRS_JO_ACMP_HST	HRS_JOITEMSHST	'PERSON'
Applicant School Education History HRS_APP_SCH_HST	HRS_APPITEMSHST	'PERSON'
Screening Competencies HRS_JO_SCR_CMP	HRS_JO_SCR_ITEM	'PERSON'

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Previous Release Information	New Release Information	Profile Type
Screening Competency Points HRS_JO_SCR_CMPP	HRS_JO_SCR_ITEM	'PERSON'
Screening Accomplishments HRS_JO_SCR_ACMP	HRS_JO_SCR_ITEM	'PERSON'

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Talent Acquisition Manager	All	All

Task 6-22-2: Reviewing Recruiting Solutions Saved Searches

During the PeopleSoft Recruiting Solutions upgrade, data in Applicant Saved Searches Accomplishments search criteria cannot be accurately converted due to changes in the record structure of the new PeopleSoft release. This is because Accomplishments have been separated out into various separate entities in the new release, such as Languages, Degrees, etc.

To preserve previous release Accomplishments Saved Search criteria, the data has been converted to the Languages search criteria area in the new release. After the upgrade, review any Saved Searches where data exists in Languages criteria for the search. It may be necessary to move or split the search criteria out of Languages and into one or more content type fields for these Saved Searches. The content type field in which the search criteria is placed (for example, Degrees vs. Memberships vs. Languages) will affect the area that is searched for matches. You may need to adjust and test your Saved Searches to return the same results you had in your previous release. To identify Saved Searches that need to be reviewed after you upgrade, use the following SQL. Run this SQL in your target database after your upgrade is complete.

```
SELECT HRS_OWNER_ID
, SEARCH_NAME
, JPM_CAT_TYPE
, HRS_SCH_CUSTCONT
, HRS_ROW_UPD_DTTM
FROM PS_HRS_SRCH_SAVED2
WHERE JPM_CAT_TYPE = 'LNG'
AND HRS_SCH_CUSTCONT <>"
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Talent Acquisition Manager	All	All

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Task 6-22-3: Reviewing Recruiting Solutions Interviews

During the PeopleSoft Recruiting Solutions upgrade, applicant interview data is upgraded to cater for the new Calendar Integration functionality in the new PeopleSoft release. While existing interview data is upgraded, there are no calendar entries generated for interview participants in the calendar software you may have chosen to integrate with. You may need to review interview data after the upgrade to use the new Calendar Integration functionality for existing interviews.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Talent Acquisition Manager	All	All

Task 6-22-4: Reviewing Resume and Job Opening Template Sections

Resume and Job Opening template data have been converted in the new PeopleSoft release as part of the data conversion process. In addition, Job Opening and Resume Template system data has been copied from your demo database as part of the Upgrade System Data updates. As a result, it is possible that more than one of the same Resume or Job Opening template sections will now exist in a given template. Oracle has provided the SQL statement below to assist in identifying where multiple template sections exist within the same template. Run the SQL below and manually update the templates to ensure that each section occurs only *once*. If the SQL does not return any data, no action is needed.

Run the following SQL statement to identify sections occurring more than once in a Resume Template:

```
SELECT HRS_RES_TMPL_ID, HRS_RES_SEC_NAME12, COUNT(*) from PS_HRS_RES_SECTION
GROUP BY HRS_RES_TMPL_ID, HRS_RES_SEC_NAME12 HAVING COUNT(*) > 1
```

Run the following SQL statement to identify sections occurring more than once in a Job Opening Template:

```
SELECT HRS_JO_TMPL_ID, HRS_JO_TMPL_SCTN12, COUNT(*) from PS_HRS_JO_TMPL_SCT
GROUP BY HRS_JO_TMPL_ID, HRS_JO_TMPL_SCTN12 HAVING COUNT(*) > 1
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Talent Acquisition Manager	All	All

Task 6-22-5: Reviewing Answers to Screening Questions

In the new PeopleSoft release, it is possible that answers to screening questions may be configured in such a way that no correct answer is defined. This may cause problems for applicants if these questions are included in the on-line Job Applications. Manually review all existing questions in your upgraded database to ensure that at least one correct answer exists for each question.

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Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Talent Acquisition Manager	All	All

Task 6-22-6: Reviewing Attachment URLs

In your previous PeopleSoft release, the URL for all attachments to Applicant Data (including references, resumes, and correspondence) is HRS_APP_ATCH, which was delivered pointing at the PeopleSoft PeopleTools record PSFILE_ATTDET. In the new PeopleSoft release, the URL points to the table HRS_ATTACHMENTS. Determine if you used the attachment functionality in your previous PeopleSoft Recruiting Solutions release. If you used this functionality, manually move the attachments to the correct table so they are available in the new release.

To manually move attachments:

1. Select PeopleTools, Utilities, Administration, Copy File Attachments.
2. Move the data from PSFILE_ATTDET to HRS_ATTACHMENTS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Talent Acquisition Manager	All	All

Task 6-23: Reviewing PeopleTools Functionality

The PeopleSoft 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 PeopleBooks and PeopleTools installation guide to configure your environment properly. This may include, but is not limited to, configuring and starting a process scheduler and a report server, and reviewing portal settings.

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

To review the PeopleSoft PeopleTools Release Notes, go to My Oracle Support and search for the PeopleSoft PeopleTools Release Notes for your new release.

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 PeopleSoft Change Assistant output directory if you do not know whether a script was already run during the upgrade process.
- Oracle has updated the styles that define the look of the user interface.

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Three user interface options were delivered with your current release of PeopleSoft 8.x. Pre-8.50 PeopleSoft PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. The classic and light blue styles are considered deprecated as of PeopleSoft PeopleTools 8.50. The dark blue style is set as the default during the PeopleSoft PeopleTools portion of the upgrade, but you have the option to change the user interface style.

See Appendix: "Changing the User Interface."

Note. The new user interface styles are used with the supported browsers for your PeopleSoft PeopleTools release. If you are using any other browser or release, the system uses the classic style as the default.

- PeopleSoft PeopleTools uses Verity to implement free text search.

  If a new release of Verity is required with the new PeopleSoft PeopleTools release, you need to check for the necessary application patches that may be required to use the new version of Verity.

  To check for required patches, go to My Oracle Support, select Patches & Updates, PeopleSoft, and search for PeopleTools Required for Upgrade patches for Verity.

- 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 the PeopleTools: PeopleSoft Integration Broker PeopleBook for your new release, Appendix: "Understanding Migrated Integration Metadata."

- In PeopleSoft PeopleTools 8.50, Microsoft SQL Server customers need to use a non-system administrator access ID. If you are upgrading from PeopleSoft PeopleTools 8.49 or earlier, enable and configure the access ID after completing the final pass of the upgrade.

  See the PeopleTools Installation for Microsoft SQL Server guide for your new release, Appendix: "Synchronizing the ACCESSID User."

- Review your PeopleSoft Portal settings, as the values may have changed during the upgrade.

  See the PeopleTools: PeopleTools Portal Technologies PeopleBook for your release, Appendix: "Understanding Changes in Portal Configuration Settings."

- As of PeopleSoft PeopleTools 8.51, Oracle database customers can now restrict the Access ID to the minimum privileges needed to run PeopleSoft applications. If you are upgrading from PeopleSoft PeopleTools 8.50 or earlier, restrict the Access ID privileges after completing the final pass of the upgrade.

  See the PeopleTools Installation for Oracle guide for your current release, "Creating a Database Manually on Windows" and "Creating a Database on UNIX," Creating PeopleSoft Database Roles.

Properties

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

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Task 6-24: Enabling Oracle Transparent Data Encryption

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. Oracle's Transparent Data Encryption (TDE) feature was disabled at the beginning of the upgrade. If you had TDE enabled prior to the upgrade, then after finishing the final Move to Production pass of the upgrade, you need to re-enable TDE by running scripts in the sequence specified in the following procedure.

To re-enable TDE:

1. Run *PS_HOME*\scripts\postupgtdeprocess1.sql.

   The script postupgtdeprocess1.sql performs similarly to the script preupgtdeprocess.sql, which you ran at the beginning of the upgrade, to find any tables that are encrypted, generate a list of fields that need to have the PeopleSoft metadata encryption attribute re-enabled, and create the ENCRYPTEDTBLSA project. The ENCRYPTEDTBLSB project is compared with the ENCRYPTEDTBLSA project, and the resulting list of differences between the recfields is input to the script postupgtdeprocess2.sql.

   See "Applying PeopleTools Changes," Performing Updates to PeopleTools System Tables, Saving Transparent Data Encryption Information.

2. Run *PS_HOME*\scripts\postupgtdeprocess2.sql.

   The script postupgtdeprocess2.sql generates four scripts, which you will run in the next step to reapply TDE to the records identified by the postupgtdeprocess1.sql. Review the generated scripts (particularly PSTDEREBUILDFUNCIDX.SQL) to make sure that the syntax, sizing, and tablespace information is intact and is not split at the end of a line. If necessary, modify the scripts as needed for your environment.

3. Run the scripts that were generated when you ran postupgtdeprocess2.sql in the following order:

   - PSTDEDROPFUNCIDX.SQL
   - PSTDEREENCRYPT.SQL
   - PSTDEREBUILDFUNCIDX.SQL
   - PSTDEREENCRYPTMETADATA.SQL

4. Run *PS_HOME*\scripts\postupgtdevalidation.sql.

   The script postupgtdevalidation.sql validates that all tables and columns that were encrypted before the upgrade have maintained encryption. It lists any records that contain encrypted fields but were not included in the ENCRYPTEDTBLSB project. It also sets the value for the TDE algorithm defined within PSOPTIONS.

See the PeopleTools: Data Management PeopleBook for your new release, Administering PeopleSoft Databases on Oracle, "Implementing Oracle Transparent Data Encryption."

Properties

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

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Task 6-25: Preparing the Content Provider Registry

You should perform this task if you use PeopleSoft Portal Solutions 8.4 or later running on PeopleSoft PeopleTools 8.50 or later with full or partial navigation load access method. This means that you do not use a single link to access your content provider databases, but instead, you load some or all of the portal registry structures from the content provider database into your PeopleSoft Portal Solutions database. Oracle refers to content provider databases as the application databases that contain the transaction content. Your Copy of Production database is your content provider database for this task.

When you upgrade a content provider database, the registry structures are updated, old registry structures are removed, and new registry structures are added. These changes need to be copied to the PeopleSoft Portal Solutions database by updating the portal registry structures in your PeopleSoft Portal Solutions database to match what is in the content provider database. Follow the detailed instructions in the appendix referenced below.

See Appendix: "Upgrading the Content Provider Registry."

Properties

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

Task 6-26: Updating the Portal Options Data

In this step you update the PeopleSoft PeopleTools Portal Options data.

Note. Only perform this step if your upgraded database is on PeopleSoft PeopleTools 8.46 or greater.

This step sets the portal options prefix and Owner ID. These values are used when creating Pagelet Wizard definitions and Navigation Collection objects.

To set the Portal Options Prefix and Owner ID:

1. From your browser, sign in to your New Copy of Production database.
2. Select PeopleTools, Portal, Portal Utilities, System Options.
3. Update the value for the Registry Object Prefix with a 1- to 4-character prefix that is unique to your organization.

   Note. Do *not* use PAPP, PAPX, PAPQ, PAPI, PRTL, EO, or PT. Do *not* use any product line specific prefix (such as CR, HC, EP, or CI). Do *not* use a blank value.

4. Enter the Owner ID value with your organization's specific owner ID.

   Note. The Owner ID is a translate value on the PeopleSoft PeopleTools field OBJECTOWNERID. Do *not* use any delivered product Owner ID. If you do not have an Owner ID, then either create one, or leave the Owner ID value as a blank space.

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5. Click Save.

Properties

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

Task 6-27: Deleting Rename Data

After completing the final Move to Production pass, delete all the data stored in the PSOBJCHNG table. Do not delete this data if you have not completed your final Move to Production pass. The application rename data stored in the PSOBJCHNG table must be deleted before starting your next PeopleTools-only upgrade. The build process looks in this table when running alter renames.

Run the following SQL on your Target database:

```
DELETE FROM PSOBJCHNG
```

Important! Perform this task only once, after you complete your final Move to Production pass.

Properties

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

Task 6-28: Stamping the Database

In this step, you set the database to the release level of the Demo database. The values that you enter here appear whenever you view the Help, About PeopleTools dialog.

To stamp the database:

1. Launch PeopleSoft Application Designer on your Copy of Production database using the new PeopleSoft release.
2. Select Tools, Upgrade, Stamp Database.
3. Fill in all three of the PeopleSoft Release fields with the appropriate value for your product line and release number:

   ```
   HRMS, 9.10
   ```

4. In the Service Pack field, enter the service pack number to which you are upgrading. For example, if you are upgrading to SP2, enter the number *2*. If you are upgrading to a release that is not at a service pack level, enter *0*.

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Note. If you are upgrading directly to a Feature Pack, enter 0.

5. Click Stamp.
6. Close PeopleSoft Application Designer.

Properties

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

Task 6-29: Reviewing Change Control

Earlier in the upgrade process, in the beginning of the chapter “Applying 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 in to the Target database using PeopleSoft Application Designer.
2. Select Tools, Change Control, Administrator.

   The following example shows the options available on the Change Control Administrator dialog box:

Change Control Administrator dialog box

3. Set “Use change control locking” and “Use change control history” according to your site specifications.

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are only executed during the initial pass, and the feature is only disabled during the initial pass. If you enable the feature at this point, it will remain enabled during future test Move to Production passes.

See “Applying PeopleTools Changes,” Turning Off Change Control.

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Properties

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

Task 6-30: Backing Up Before Testing

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

Properties

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

Task 6-31: Testing Your Copy of Production

In this task, you test your Copy of Production. Testing your Copy of Production will ensure that you can still operate your day-to-day processes on your new release. After you have reviewed your DDDAUDIT, SYSAUDIT, and SYSAUD01, verify that the system is working properly by reviewing the system online. After you are comfortable that the system is working properly, you can perform the Test Move to Production upgrade pass.

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

Properties

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

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CHAPTER 7

Applying Changes to the Production Database

This chapter discusses:

- Understanding the Move to Production
- Testing the Move to Production
- Testing Once More
- Performing the Move to Production

Understanding the Move to Production

Once you complete all of the necessary tasks to launch your system into production, you are ready to begin your Test Move to Production passes or to move your system into production.

Task 7-1: Testing the Move to Production

This section discusses:

- Understanding the Test Move to Production Passes
- Understanding the Test Move to Production Steps
- Creating a New Change Assistant Job

Understanding the Test Move to Production Passes

Everything you have done to this point is the initial pass of the upgrade process. Now you are ready to start the Test Move to Production pass. The initial pass is very time consuming and requires a lot of analysis at different steps of the process to troubleshoot issues. The Test Move to Production pass is a different series of steps, which includes a subset of the previous tasks, and takes advantage of the tasks performed during the first upgrade pass.

You should perform as many test moves to production as necessary to work out any issues and to be comfortable with the process. During each Test Move to Production you will be able to refine the process so that you can save time and avoid manual processes. These test passes will also let you know how long the process takes so you can plan your production downtime for your move to production weekend.

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Task 7-1-1: Understanding the Test Move to Production Steps

The following text is a high level view of what you will be doing in the Move to Production test pass. The remaining steps in this task will prepare your test environment. For example, you may need to move some scripts generated in the initial pass to a new PeopleSoft Change Assistant staging directory. Next you will create a new PeopleSoft Change Assistant job, setting the Type of Upgrade to Move to Production. That will give you a job with steps filtered with only those steps that apply to the Move to Production (MTP) test pass. From that point forward, you will simply follow the steps as they exist in your new job.

One of those first steps will be to take a Copy of Production. This second Copy of Production is sometimes referred to as the "New Copy of Production." The first Copy of Production, or "old" Copy of Production, will now be the Source database (it was the Target database in the initial test pass). The New Copy of Production is now the Target database.

The steps executed in the MTP pass vary in several ways. Many of the tasks and steps in the initial test pass will be replaced in the MTP pass with PeopleSoft Data Mover export and import scripts. In the initial pass, some steps required you to make functional decisions and take time to manually set up data. That data can be copied from the first database to the next, saving you setup time and eliminating the chance for manual error or typos.

Also, the MTP pass does not repeat the database compare/copy steps. You made the decisions once; there is no need to repeat these steps. Instead, a PeopleSoft Data Mover script, MVPRDEXP, will export all of the tables that contain the PeopleSoft PeopleTools objects like records and PeopleCode from the first database. Another PeopleSoft Data Mover script, MVPRDIMP, will import those tables into the second database. Anything you have done to PeopleSoft PeopleTools objects while executing or testing the first pass—copied objects from the Demo database, reapplied customizations, applied updates from the My Oracle Support website—will be moved to the second Copy of Production with these scripts.

Another important difference with the MTP pass is the handling of SQL scripts that create and alter tables. In the initial pass, you generated the SQL scripts, sometimes edited the SQL script, and then executed the SQL scripts. In the MTP pass, you may be able to skip the generation steps and use the SQL you previously generated. This is another way to save time in your critical go-live window and is the ultimate goal, but it is an incremental process to get to that point.

In the first MTP pass, everyone must regenerate the SQL. There are small differences between the initial and MTP passes that require the SQL to be regenerated in at least one MTP pass. The PeopleSoft Change Assistant templates are delivered with the steps set this way.

In subsequent MTP passes, you may choose to "turn off" the generation steps if possible. If you have not changed any records at the end of one MTP pass, then you can reuse the SQL in your next pass. If you have done anything to change records, you should generate SQL again. This can include changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.47 to 8.48), or applying updates from the My Oracle Support website that involve record changes, or making additional customizations to records.

If you choose to skip some of these steps, do one of the following: mark the step complete in your job, or change the step properties in the template, so that the step will never show up in your MTP filtered job again. To change the step properties, double-click on the step to open the Step Properties dialog, and change the Type of Upgrade to Initial Upgrade. In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. PeopleSoft Change Assistant will look for the SQL scripts in the output directory set on the job's Database Configuration, so make sure it will find them when it tries to run them.

The steps that are eligible for this treatment will contain Move To Production documentation notes indicating such.

Note. If you have made any changes to your trees, tree structures, or PS/Query objects since the upgrade began, you may want information on how to preserve those changes.

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See Appendix: “Preserving Queries and Tree Objects.”

Properties

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

Task 7-1-2: Creating a New Change Assistant Job

You need to create a new PeopleSoft Change Assistant job for each test Move to Production pass.

To create a new PeopleSoft Change Assistant job:

1. Oracle recommends that you use new output and stage directories for each new test pass. Create those directories now.
2. From PeopleSoft Change Assistant, select Tools, Options and specify the new output and staging directories on the Change Assistant Options page.
3. Select File, Open Environment and select the environment.
4. Review the configuration in the General Settings dialog box.

   The Database Type, Language and SQL Query Executable will be the same as your previous job. Make changes to the *PS_HOME* and *PS_APP_HOME* settings, if necessary, and select Next.
5. Specify the Source Database setup information and click Next.

   This is the Copy of Production database from your previous pass.
6. Specify the Target Database setup information and click Next.

   This is the new Copy of Production database.
7. Review the environment configuration on the Confirm Selections dialog box, and click Next to save the changes to the environment.
8. Select File, New Job.
9. In the Use Template dialog box, select the template and click OK.
10. In the Type of Upgrade dialog box, select Move to Production.
11. Click OK.

    A new upgrade job is created, using the naming convention “*Template_Environment*_Move to Production.”
12. Highlight the job name and select Edit, Set Documentation Directory, then select the directory where the documentation is located and click OK.
13. Select View, Documentation.
14. Select View, Expand All to display all the steps in the job that apply to your upgrade.

    The job will contain steps that were not in the initial upgrade pass and will exclude some steps that were in the initial upgrade pass, based on the step properties.

Now you are ready to run the job.

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Properties

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

Task 7-2: Testing Once More

As in any implementation project, you must consider planning, resources, development, and training. Testing also needs to be an integral part of your implementation project. Testing your database once more, after you have completed the upgrade, ensures that you can still operate your day-to-day processes on your new PeopleSoft release.

The level of testing in this task will focus primarily on the strategies to employ before moving into production.

Properties

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

Task 7-3: Performing the Move to Production

When you are ready, you can move the system into production. Take your system out of production and perform all of the steps involved in testing the Move to Production against your production database.

See Testing the Move to Production.

Properties

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

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CHAPTER 8

Appendices

Understanding Appendices

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

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APPENDIX A

Applying Fixes Required for Upgrade

This appendix discusses:

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

Task A-1: Preparing to Apply Fixes

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

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

Note. Because of interdependencies between products and product lines, you will need to download all fixes for all HRMS products and product lines, even if you are not licensed for them. If you do not need the program, the upgrade will detect it, but you can introduce an error by not applying it. This includes HRMS Commercial, HRMS Education and Government, and HRMS Federal Government product lines, as well as all products within the product lines.

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

To apply files and fixes:

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

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

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

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

Task A-2: Applying Fixes During Installation

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

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

To apply script fixes during installation:

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

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

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

Task A-3: Applying Fixes After Copying Project

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

To apply PeopleSoft project fixes before data conversion:

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

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

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

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

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

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

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

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

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

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

Task A-4: Applying Fixes After Data Conversion

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

Task A-5: Applying Fixes Between Upgrade Passes

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

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Task A-6: Applying Fixes in Move to Production

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

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APPENDIX B

Changing the User Interface

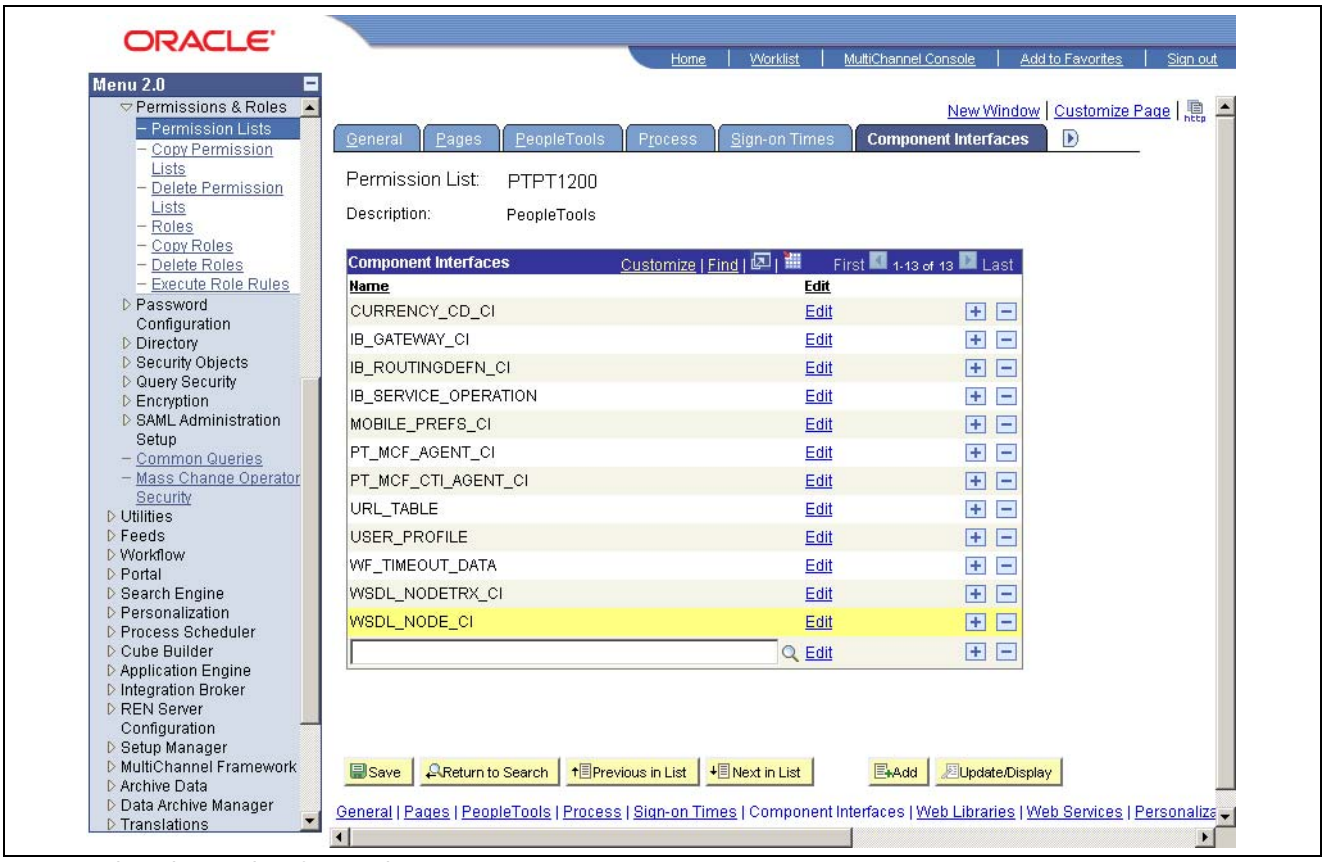
This appendix discusses:

- Changing the User Interface Style

Task B-1: Changing the User Interface Style

Three user interface options were delivered with your current release of PeopleSoft 8.x. The dark blue style is set as your default style. PeopleSoft 8.4 applications and pre-8.50 PeopleSoft PeopleTools system databases use the classic style, but all other applications use the new dark blue style. The classic and light blue styles are considered deprecated as of PeopleSoft PeopleTools 8.50. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The following example represents the classic style.



The classic style user interface option

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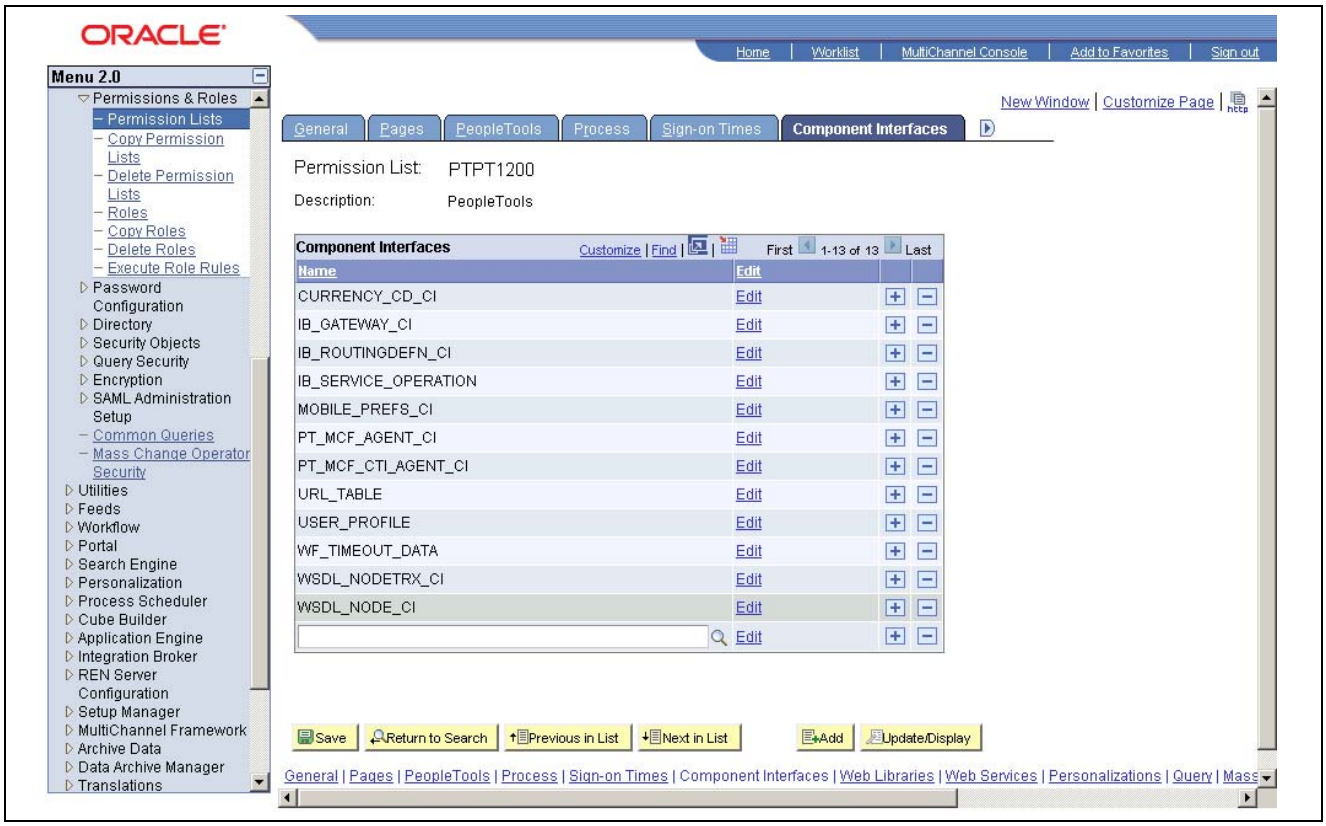
The following example represents the light blue style.



The light blue style user interface option

This example represents the dark blue style.

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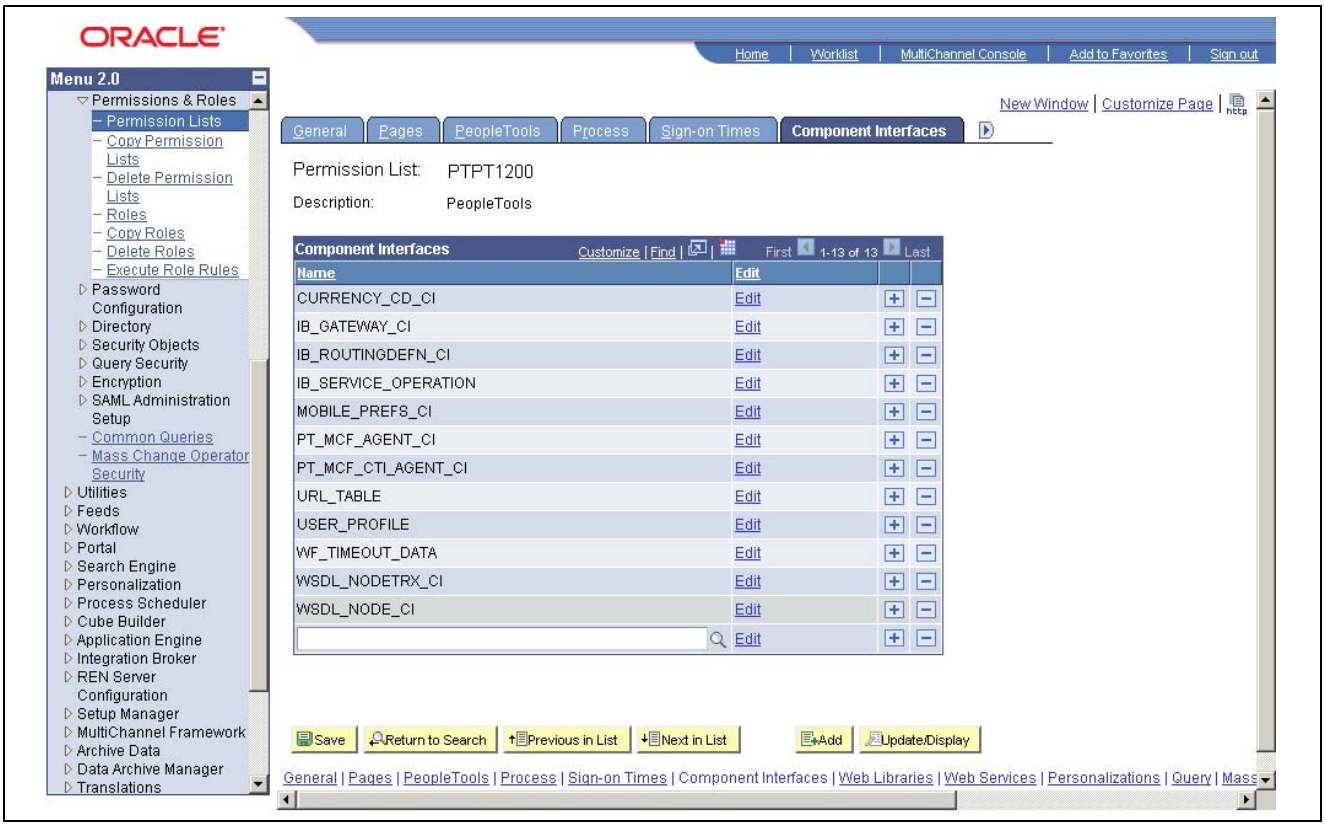

The dark blue style user interface option

See the PeopleTools: PeopleSoft Application Designer Developer's Guide PeopleBook for your new release.

To change your style, you must delete the sub-stylesheets associated with the dark blue style and replace them with either the classic or light blue sub-stylesheets.

Note. The new user interface styles are supported by Internet Explorer release 5 and later and Netscape Navigator release 6 and later. If you are using a browser and release other than these, the system defaults to the classic style.

To enable a deprecated user interface:

1. In PeopleSoft Application Designer, select File, Open.
2. In the Open Definition dialog box, select Style Sheet from the Definition drop-down list.
3. Enter the name *PSSTYLEDEF* in the Selection Criteria Name field, and select Open.
4. Highlight PSSTYLEDEF in the list, and select Open.
5. Click the PSALTERNATE sub-stylesheet and press DELETE.
6. Select Insert, Insert Sub Style Sheet.
7. Select PSALTERNATE_LIGHTBLUE or PSALTERNATE.
8. Repeat steps 5 through 7 for the PTSTYLEDEF and PSACE sub-stylesheets, making sure to select the same sub-stylesheet that you used in step 7.
9. Select File, Save.
10. Open the stylesheet PSQUERYSTYLEDEF, as you opened a stylesheet in steps 1 through 4.

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11. Click the PTQUERYSTYLESUB_DARKBLUE sub-stylesheet and press DELETE.
12. Select Insert, Insert Sub Style Sheet.
13. Select PTQUERYSTYLESUB_LIGHTBLUE or PTQUERYSTYLESUB.
    Use the same sub-stylesheet that you used in step 7.
14. Select File, Save.

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APPENDIX C

Preserving Queries and Tree Objects

This appendix discusses:

- Understanding Preserving Queries and Trees
- Preparing the Database
- Creating a New Project
- Comparing the New Project
- Copying the Project
- Testing the Project
- Re-Exporting the PeopleTools Tables

Understanding Preserving Queries and Trees

This appendix contains information for preserving queries, trees, and tree structures. At the beginning of your upgrade, you should have informed your end-users and development team that your PeopleSoft system was frozen, meaning that no changes should have been made to any PeopleSoft PeopleTools tables or objects including queries, trees, and tree structures. The freeze on PeopleSoft PeopleTools changes is important because you will lose any changes to these objects made during an upgrade to PeopleSoft PeopleTools tables. Occasionally, however, end-users may have to make critical changes to trees, tree structures, and PS/Query objects. If this has happened in your system, you can perform a process to preserve those additions and changes to trees, tree structures, and queries. You will have to work with your end-users and developers to obtain a list of queries, trees, and tree structures that you need to preserve.

You will run through the test Move to Production (MTP) steps several times for practice and testing purposes. Please note that you have the option to perform the preserving queries and trees procedure during each of your test Move to Production runs, but you must perform it during the last run of the test Move to Production. If you do not perform this procedure during your last run to preserve the trees, tree structures, and queries that have been changed since the beginning of your upgrade, they will be lost.

Note. The process outlined in this appendix to preserve trees and queries should be performed prior to data conversion so that any additional conversion would be taken care of by the appropriate data conversion programs.

This appendix includes instructions to prepare your database and create a project on which to preserve your queries, trees, and tree structure changes.

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Task C-1: Preparing the Database

In this step, you create a new copy of your current production database, perform steps on the new copy, and run scripts against the new copy to update the release level.

To prepare the database:

1. At the beginning of the test Move to Production, you should make a new copy of your current production database. To preserve queries and trees, you need to make not only that Copy of Production but also an additional copy of your current production database. For clarity, Oracle refers to this additional copy of your production database as the Tree/Query Copy of Production database. So now you should have a Copy of Production database and a Tree/Query Copy of Production database.
2. Perform the test Move to Production on your Copy of Production database.
3. To obtain the queries and trees that you want to preserve, the Tree/Query Copy of Production database needs to be at the same release level as the Copy of Production database on which you just completed the test Move to Production. To update your Tree/Query Copy of Production to the same release, you run release scripts against this database. Oracle refers to this as “reling up” the database. Use the Custom Compare template to “rel up” your database. Select the Product Line *PEOPLETOOLS* when configuring your PeopleSoft Change Assistant job.

Task C-2: Creating a New Project

Now that your Tree/Query Copy of Production is at the same release as your Copy of Production database, you create a project in the Tree/Query Copy of Production that contains all of the queries and trees that you wish to preserve.

To create a new project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, New...
3. Select *Project* for Object Type.
4. Select File, Save Project and enter a project name; for example, *PRESERVED.*
5. Select the Upgrade tab in PeopleSoft Application Designer.

   Note. Queries and trees do not appear in projects under the Development tab in PeopleSoft Application Designer. To see the queries and trees that you will insert into the PRESERVED project in the next step, you must make sure that you are using the Upgrade view of PeopleSoft Application Designer.
6. Select Insert, Definitions into Project...
7. Select Queries from the Definition Type drop-down list box and click Insert.
8. Using your list of identified queries that need to be preserved, highlight each one of those queries from the PeopleSoft Application Designer list.

   You can highlight more than one by holding down the Control (CTRL) key while you click the name of the query.

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9. After you have highlighted all of the queries that you want to preserve, click Insert, then click Close.

   Under the PRESERVED project name in the Upgrade view of PeopleSoft Application Designer, you will see Queries as an object type in the project.

10. Double-click on queries under the PRESERVED project to see a listing of all of the queries to preserve in the right-hand window of PeopleSoft Application Designer.
11. Select File, Save Project.
12. Repeat steps 6 through 11 for trees and tree structures.

    Now your PRESERVED project should contain all of the queries, trees, and tree structures that you want to preserve.

Task C-3: Comparing the New Project

In this step, you compare the queries, trees, and tree structures that are in your PRESERVED project against your Copy of Production database. Because the tree objects in your PRESERVED project are not comparable objects in PeopleSoft Application Designer, you must manually compare the tree objects that you want to preserve. During the query and tree structure compare process, the Application Upgrade utility sets the project flags. These flags determine whether the following actions will occur:

- Changes will be performed on the Copy of Production (Target) database when you perform the export and copy.
- Changes will be tagged as *Copy* or *Delete* operations.
- The project flags will be set to automatically take these actions or not.

These settings are determined based on whether or not the objects in the project currently exist on the Copy of Production (Target) database.

To compare the new project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, Open...
3. For Definition, select Project and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Compare and Report.
6. Sign in to your Copy of Production.
7. From the Object Type box, select *Queries and Tree Structures*.
8. Click Options…
9. Select *PeopleSoft Vanilla* for the Target Orientation.
10. Select *Project* for the Compare Type.
11. Verify that the Compare Report output directory is set to the correct location.
12. Select the Report Filter tab and set the report filter check boxes appropriately for your compare.
13. Click OK.

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14. Select Compare.
15. Review the compare reports for queries and tree structures. In addition, perform a manual compare of the trees that you want to preserve. Based on the results of this review, set the Action and Upgrade check box appropriately in the PRESERVED project.

Task C-4: Copying the Project

In the following steps, you copy the PRESERVED project to the Target database. This is the Copy of Production database on which you ran the test Move to Production.

To copy the project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, Open...
3. For Definition, select *Project* and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Upgrade, Copy.
6. Sign in to your Copy of Production database.
7. Make sure that the Reset Done Flags and Copy Project check boxes are selected.
8. Click Select All.
9. Click Copy.
10. Using the Upgrade view of the PRESERVED project in PeopleSoft Application Designer, review the Done flags in the project to make sure that all of the objects that you wanted to preserve were copied to the Target database.

Task C-5: Testing the Project

Now that the queries, trees, and tree structures that you wanted to preserve are in the Copy of Production database, you must test and re-test and make any necessary changes if the test results are not what you expected.

Task C-6: Re-Exporting the PeopleTools Tables

Once you are satisfied with the test results, you must re-export the PeopleSoft PeopleTools tables to actually preserve the queries, trees, and tree structures. During your test Move to Production, you ran MVPRDEXP.DMS to export the PeopleSoft PeopleTools tables. You will use the output files created from running this job as input files during your Move to Production. Because these files were created before copying the queries, trees, and tree structures that you wanted to preserve, the files do not contain the preserved objects, so you must run the MVPRDEXP.DMS script again. Running the MVPRDEXP.DMS script again ensures that you have the most current PeopleSoft PeopleTools tables.

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To re-export the PeopleTools tables:

1. As a PeopleSoft user, launch PeopleSoft Data Mover against your Copy of Production database and run the following script:

   ```
   \PS_HOME\SCRIPTS\MVPRDEXP.DMS
   ```

2. Use the output files created during your final Move to Production.

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APPENDIX D

Reviewing Batch Program Changes

Reviewing Batch Program Changes

Some of the batch processes have been rewritten from the previous version. Some were converted to Application Engine, while others were rewritten and renamed. The following table lists the batch programs (COBOL and SQR) that have been changed. Use this list when you review your batch process customization. If you know you have customized a particular program on this list, review the new program to verify whether you still need that customization.

This table lists the COBOL and SQR batch programs that have changed:

Program Name in Previous Release	New Release Program Environment	New Release Program Name
BEN101.SQR	Removed as obsolete, replaced by plan-type-specific model SQRs.	Replaced by BEN102.SQR, BEN103.SQR, BEN104.SQR, and BEN105.SQR.
BEN500.SQR	SQR Program re-delivered as an Application Engine.	BN_BEN500_AE
BEN100.SQR	Replaced by BEN100A.SQR and removed as obsolete.	Replaced by BEN100A.SQR and removed as obsolete.
BEN110.SQR	Split into two processes: BEN110 Application Engine "Snapshot Premium - Calculation" and BEN110.SQR "Snapshot Premium - Report."	Now invoked through Processing Job BEN110_J "Snapshot Premium - Reporting."
BEN702.SQR (Flat) BEN704.SQR (Age) BEN714.SQR (Service) BEN731.SQR (Salary)	Individual Rate Table reports were removed and consolidated into a new report.	Replaced by BEN741.SQR (Benefits Rate Table).

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APPENDIX E

Reviewing Benefits Changes

This appendix discusses:

- Reviewing Savings Management Enhancements
- Understanding Benefit Program Enhancement
- Reviewing Changes to Relationship Usage
- Reviewing Spending Account Changes
- Reviewing Consolidation of Benefit Rates
- Reviewing Consolidation of Coverage Calculations

Task E-1: Reviewing Savings Management Enhancements

Savings Extensions and Overrides has been renamed and redesigned to reflect its true Savings Management purpose. Limit types/Exception Reasons have been expanded to include Limit 401(a)/Adjust Eligible Earnings YTD, which allows the user to adjust eligible earnings used in 401(a) limit processing. The second Limit type/Exception reason is the Hardship Withdrawal 402(g) limit reduction, which was taken off of the 402(g) Catch up row. The corresponding Hardship Withdrawal Date, which regulates the Savings Plan suspension period after a hardship withdrawal, has been moved to a new Enrollment Suspension grid. Note that Exception Reason is more descriptive of how it affects the calculation; for example, Extend Limit, Reduce Limit, or Adjust Eligible Earnings YTD.

The upgrade is performed for all rows in Savings Management, PS_SAVINGS_MGT_EE, with Limit Type/Exception Reason 402(g) Catch-up and an existing Hardship Withdrawal Date. Review the new Limit Exception 402(g) Hardship, SAVINGS_MGT_EE, and Enrollment Suspension, ENROLL_EXCEPTN, rows generated from the Limit Exception 402(g) Catch-Up record, as described for upgrade.

Task E-2: Understanding Benefit Program Enhancement

Customers have asked for an “empty” Benefit Program, one with no Plans associated with it, for use in various administrative situations. For example, PeopleSoft Payroll for North America expects a payee to be assigned to a Benefit Program even if that individual is not being administered through Base Benefits. Assigning this person to an “empty” Program emphasizes the administrative nature of the assignment and prevents unintentional enrollments from being entered. To facilitate this, a new manual Benefit Program called PSX with an effective date of 1900-01-01 is being delivered as system data. (This is because the business validations performed by the Benefit Program Definition component prevent the user from directly creating such an “empty” program themselves.)

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Task E-3: Reviewing Changes to Relationship Usage

This section discusses:

- Understanding Changes to Relationship Usage
- Reviewing Cobra Event Rules
- Reviewing Dependent Relationship Rules
- Reviewing HIPAA Changes

Task E-3-1: Understanding Changes to Relationship Usage

For consistency in the use of Relationship codes, we are consolidating any relationships codes in the Translate Table that currently reflect gender into a single genderless code. For example, *Son* and *Daughter* are being consolidated into *Child*, since in general gender is available as a separately tracked personal attribute. All tables that contain the field Relationship will undergo data conversion to reflect the non-gender translate values.

Task E-3-2: Reviewing Cobra Event Rules

Cobra Event Rules (CBR_EVENT_BENEF) is being modified to use Covered Person Type instead of Relationships, in order to streamline and standardize the functionality with the existing functionality in the Benefits Administration product. You should validate the content of this record after upgrading, since the conversion of duplicate genderless Relationship rows might have impacted your production data.

Task E-3-3: Reviewing Dependent Relationship Rules

The Dependents Relationship Table (DEPBEN_TYPE_TBL) is specifically upgraded to convert to genderless relationship codes. To eliminate duplicates, only the most current rows for any grouping of old gender-specific translate values was converted. Customized rows that do not conflict with the new PeopleSoft-maintained non-gender values are converted, but overlapping rows are deleted. You should validate the content of this record after upgrading.

Task E-3-4: Reviewing HIPAA Changes

The EDI mapping table (BN_834_MAP_TBL) is specifically upgraded to convert to genderless relationship codes. Customized rows that do not conflict with the new PeopleSoft-maintained non-gender values are converted, but overlapping rows are deleted. You should validate the content after upgrading.

Task E-4: Reviewing Spending Account Changes

This section discusses:

- Understanding Spending Account Setup
- Reviewing Changes to Spending Account Pledge Limits
- Reviewing FSA Claims Processing Setup

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Task E-4-1: Understanding Spending Account Setup

A new field, Spending Account Type (BN_SPEND_ACCT_TYPE), has been added to the FSA Benefit Table. It is used to distinguish whether the Spending Account being created is a traditional Flexible Spending Account (which assumes claims management) or a newly supported Health Savings Account. The default value for this new field is *Flexible Spending Account.* During the Record-Alter step of applying the upgrade, all existing rows will receive this default value, since that is the only type of Spending Account that was previously supported. Further, for plan types 60, 61, 65, and 66, this attribute cannot be changed. This is because certain assumed functional and regional behaviors for these standard FSA plans are built into the code. For all other plan types, the Spending Account Type is open for assignment, although all benefit plans under a given plan type *must* have the same Spending Account Type. Note also that the system still has limitations about its ability to manage client-defined plan types within the 6X series.

A new field, Plan Contribution (PLAN_CONTRIBUTION), has also been added to the table. This concept is borrowed from Savings Plans and controls the requirements for employee contributions (Annual Pledge) when enrolled in a Spending Account. That is, once enrolled, this flag controls whether an employee contribution is required, is optional (perhaps because the employer is also contributing), or not allowed (as might be the case for a fully employer-paid HSA plan). To retain existing system behavior, the default for this field during the Record-Alter step is *Contribution Required.*

Task E-4-2: Reviewing Changes to Spending Account Pledge Limits

For Spending Accounts (6X plans) the Minimum and Maximum Employee Annual Contribution limits have been moved from the Benefit Program definition (from the Plan-level on PS_BEN_DEFN_PLAN) onto the Spending Account plan table (PS_FSA_BENEF_TBL). This provides better control over plan-specific limits. The data conversion performed on existing limit data is consequently a “best guess.” This is because the same 6X plan may appear in more than one Benefit Program, but with different plan-type-level limits. Thus, the existing limit definitions cannot be accurately mapped from their current plan-type level to the new individual benefit-plan level. The data conversion process will copy the lowest non-zero Minimum limit and the highest non-zero Maximum limit found for each Benefit Plan to the Spending Account Plan Table. As part of your implementation of this upgrade release, you need to review all of your existing 6X Spending Accounts and verify the limit information for them. Note that the default numeric value of 0 for either limit will be interpreted as unlimited (or limit not used). Note that in order to reduce the impact of this feature, the existing limit fields are not physically removed from the PS_BEN_DEFN_PLAN table, but rather simply hidden on all application pages, set to zero in the table, and ignored by all processing.

Task E-4-3: Reviewing FSA Claims Processing Setup

An FSA Admin Configuration tab has been added to the FSA Benefits Table setup to capture the information needed to properly implement the optional grace period, where overlapping periods exist for different calendar years and claims may be paid from either available remaining pledge. This information is only needed if FSA claims will be processed using the FSA Administration product.

Two new date fields, Service Date From and Through, are used to determine the service dates that are valid for claims submitted. The following online restrictions apply:

- Claims must have a service date within the service date range to be paid under the plan.
- The beginning service date will default to the effective date of the plan; for example, 1/1/2006.
- The end service date will default to 12 months after the effective date of the plan; for example, 12/31/2006.
- The end service date must be greater than or equal to the beginning date.

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- The service date range may be longer than 12 months and may overlap with service dates of other benefit plans that the employer offers in which the employee is enrolled.

A new Plan Year field has been added, in order to properly close only the relevant plans. All plans will need to be identified with a Plan Year value. This field has a prompt from which valid years, such as 2005 or 2006, can be selected. This value is used to group plans for use in the FSA Closure process. A new field is added to the FSA Closure run control, from which the plan year is selected. Only those plans with a matching Plan Year Name value will be displayed and then can be selected for closure.

The minimum check amount for FSA plans, which was previously determined at the benefit program level, has been moved to the benefit plan level. This allows FSA plans within one benefit program to have different minimum check amounts. It is used to determine the minimum check amount when generating payments for the plan in the same manner as before.

The upgrade process will populate the new fields as follows:

- Service dates from and through will default to the beginning and the end of the current year when the upgrade is run for all combinations of FSA plan types and benefit plans where the effective date is before the current date. In cases where future effective dates exist, a 12-month period will be assigned using the effective date as the starting service date.
- The plan year will be the current year, or the year of the future effective date, depending on the case.

Be aware that the stated assumptions might not coincide with your implemented functionality, and values will need to be reviewed after conversion by selecting Set Up HRMS, Product Related , Base Benefits , Plan Attributes, FSA Benefits Table. Also, since each effective dated row covers only a specific service period, you will need to introduce a new effective dated row for each plan type and benefit plan each year going forward in the FSA Benefits table. This is only required if FSA claims will be processed using the FSA Administration product.

Task E-5: Reviewing Consolidation of Benefit Rates

In this release, we are consolidating all benefit rate data into a single common structure. The individual Age-Graded, Flat, Salary-Percent and Service tables will be dropped, and all rate data migrated to the new Benefit Rate Table. This table has a flexible architecture that can support all rate types, and will allow for the definition of user-defined rate types as well. The data conversion process has several points that require review:

- Rate Table IDs: Because the current benefit rates exist in several individual tables, the possibility exists that the Rate Table IDs defined on those tables could conflict (be duplicates) when consolidated. To manage this, each Rate Table ID will be checked as it is converted, and if a conflict is detected, the Rate Table ID will be modified to make it unique. Appending a Rate Type code to the end of the Rate Table ID does this. In prior releases, the Rate Type field was controlled by a set of Translate Table values. The existing values are Age-Graded (rate type=1), Flat (rate type=2), Salary-Percentage (rate type=3), and Service (rate type=4). So as an example, if a Service-rate Rate Table ID “ABC” was found to conflict with an ID that had already been converted, it would be renamed as “ABC-4”. All references to the old Rate Table ID in Benefit Program definitions will be updated. You can review the set of Rate Table IDs that experienced conflicts by using the search criteria “%-%” in the new Benefit Rate Table component (Navigation: Set Up HRMS, Product Related, Base Benefits, Rates and Rules, Benefit Rates.)
- Zero-base on Numeric Ranges: The Age-Graded table and the Service table both contain ranges used to determine the correct rate. In prior releases, the system allowed two situations that make interpretation difficult. First, some Rate Tables do not have a lowest range defined. For example, the first entry may be 5 to 15. Thus the range 0 to 4 is not managed. (Fortunately, the system would default to a zero rate for values in these undefined ranges.) During data conversion, the system will insert an “anchor” value of

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zero for all ranges and set the associated rates to $0.00. Without a specific lower functional limit, the new benefit rate architecture will return an error if a value falls outside the defined table ranges. Secondly (and more commonly), the first range in the rate table may start with 1 rather than 0. For example, the first age range might be 1-20, which technically omits newborns. (Again, the system previously would default to a zero rate for ages below 1). During data conversion, the system will detect that a range starts at 1 and automatically set it to start at zero instead. Since most values (age and service) can functionally be zero in some situations, the new benefit rate architecture will return an error if a value falls outside the defined table ranges. You may want to review your converted Age-Graded and Service rates to confirm that these actions have been made appropriately. (Navigation: Set Up HRMS, Product Related, Base Benefits, Rates and Rules, Benefit Rates.)

- Currency Code: Benefit Program definitions currently display a Currency Code as an informational item. However, neither PeopleSoft Benefits nor PeopleSoft Payroll for North America perform any type of currency conversion. In previous releases, benefit rates did not include a currency code. Thus, the burden was on the user when setting up a Benefit Program to only use rates that matched the Program's currency; the system was unaware of any currency mixing. For HCM 9, the Benefit Rate Table now includes a Currency Code as an informational item (except for Percent-of-Salary rates, which have no implied currency). When setting up a Benefit Program, the system will validate that a Rate's currency matches the Program's currency to reduce setup errors. During data conversion (benefit rate consolidation), the system will attempt to assign an appropriate currency code to each Rate Table ID, based on its usage in Benefit Programs. There are two considerations here that should be reviewed: Rates may be defined that have never been used in a Benefit Program, or Rates may exist that have been used in several different Benefit Programs whose currency codes are not consistent. In the first instance, the converted Benefit Rate will have a blank Currency Code. This will not affect its use (the system will treat that as a "wildcard" and allow it to be used with any Program currency) but it should be corrected as soon as possible for the sake of simple data integrity. In the second instance, during data conversion the system will simply assign the currency code found on the alphabetically lowest Benefit Program using that Rate Table ID. This should be reviewed for correctness. (Select Set Up HRMS, Product Related, Base Benefits, Rates and Rules, Benefit Rates.)

Task E-6: Reviewing Consolidation of Coverage Calculations

In prior releases, elements of *coverage* existed not only on the Benefit Plan attribute tables, the Life ADD Table and the Disability Plan Table, but also on the Calculation Rule Table. The Life ADD Table contained the coverage formula components (Factor X Salary + Flat Amount), the Disability Plan Table contained the Maximum Monthly Benefit and an implicit formula of Salary / 12, and the Calculation Rules Table contained the Coverage and Premium As-Of date rules, the Benefit Base to use, Multiple-job combination rules, Rounding rules, and Coverage Minimum/Maximum. For this release, we consolidated these components into a "Coverage Formula."

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During data conversion, the system analyzes the usage of Life and Disability benefit plans and Calculation Rule IDs in Benefit Programs. Based on the combinations found, the system creates new Coverage Formulas to duplicate the coverage calculations performed in previous releases. The number of combinations could be quite large, and many of them could be unintentional (or even duplicates) since the Benefit Program allows complete flexibility in associating calculation rules with benefit plans, and since multiple benefit plans may exist with the same attributes but from different vendors or with different descriptions. To reduce the number of formulas created, and to avoid perpetuating unintentional variations, we restrict the data conversion; for each distinct set of Life or Disability attributes, we combine the set with only the single alphabetically lowest Calculation Rule ID with which it is associated. We then create a *model* Coverage Formula based on that combination, and update all relevant Life and Disability plans to reference the new Coverage Formula ID. In doing this, we assume that the same Life or Disability plan is not being used with a wide variety of calculation rules (different rounding rules, different Minimum/maximum, etc.), in order to avoid creating a large number of Coverage Formulas. The concept of the reusable Coverage Formula is significant enough to warrant performing only this *model* conversion, and requires a small re-implementation of your Life and Disability plans. This should be as simple as reviewing the data conversion results and confirming the actual coverage calculations in test deduction calculation runs. (Navigation: Set Up HRMS, Product Related, Base Benefits, Rates and Rules, Coverage Formula.)

To facilitate the use of the automatically converted Coverage Formulas, we have implemented a naming convention for Coverage Formula IDs that is representative of the formula's content, 99|X|X|999X|X|X|, which is described in the following table.

Byte Position	Format	Content
1-2	99	Salary factor rounded to an integer for Life, DS for Disability.
3	X	The Benefit Base used, coded as Job Compensation Rate (C) or Annual Benefits Base Rate (A).
4	X	Indication of whether the Base combines across multiple jobs, coded as Multiple (M) or Single (S).
5–8	999X	The Flat Amount for Life, if any, added to the coverage calculation, or Maximum Monthly Benefit for Disability, in a form of 500, 250K, or 1.5M, as appropriate.
9	X	The Coverage Base As-Of date rule, coded as Check Date (C), Pay End Date (P), Last Year On MM/DD (L), This Year On MM/DD (T).
10	X	A letter used to identify, in sequence, otherwise identical formulas (A, B, C, D, ...)

For example, Coverage Formula ID "02CS050KCA" would represent a Life coverage formula of "2 x Salary + 50,000," where the *Salary* is the Compensation Rate from the primary Job (not combined for multiple jobs) as determined on the Check Date. The final *A* indicates that this is the first such formula created. Note that the Rounding rules, if any, are not represented in the Coverage Formula ID string, for lack of space.

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APPENDIX F

Reviewing Global Payroll Australia Historical Data

This appendix discusses:

- Understanding Historical Data Retention
- Retaining Historical Data

Task F-1: Understanding Historical Data Retention

This appendix is intended only for PeopleSoft Global Payroll Australia customers who have upgraded from PeopleSoft Human Resource Management System 7.5 with usage of either "Human Resource Management System 7.5 to 8.8 SP1 Upgrade" or "PeopleSoft Enterprise HRMS and Student Administration Australia 7.6 to HRMS and Campus Solutions 8.9 MP1 Upgrade" in the past, and who are now upgrading to PeopleSoft HRMS 9.1.

According to the Australian legislature, employers are required to keep the Time and Wage records for at least 7 years. Oracle's PeopleSoft took care of this requirement during the upgrading from Human Resource Management System 7.5 to Global Payroll releases 8.8 and 8.9 by archiving this data in a set of records that could be viewed through Oracle's PeopleSoft Pure Internet Architecture. However these objects are not preserved in the PeopleSoft HRMS 8.9 to PeopleSoft HRMS 9.1 Upgrade path. So it is necessary to retain these objects in the database even after the upgrade to ensure that historical payroll data is not lost.

Task F-2: Retaining Historical Data

The historical data may be preserved during the PeopleSoft HRMS 8.9 to PeopleSoft HRMS 9.1 Upgrade process by inserting these objects that hold the historical data into the UPGCUST project created after the task Comparing Customizations in the chapter "Preparing Your Database for Upgrade." The objects may be inserted during the manual step Identifying Customizations. Following are the objects that need to be inserted into the UPGCUST project.

Records:

- HIS_ADDRSSBR
- HIS_BENEFPLN
- HIS_BLADJARR
- HIS_BLADJCHK
- HIS_BLADJDED
- HIS_BLADJERN

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- HIS_BLADJGRN
- HIS_BLADJSPC
- HIS_BLADJTAX
- HIS_BNKDTSBR
- HIS_BNPRGPRT
- HIS_CHECKYTD
- HIS_COMPMON
- HIS_DEDARERS
- HIS_DEDCTBAL
- HIS_DEDUCT
- HIS_DEPTTBL
- HIS_DERIVDHR
- HIS_EARNINGS
- HIS_EARNSBAL
- HIS_EMPLMT_TMPV
- HIS_ERNAUSSBR
- HIS_ERNNZLSBR
- HIS_GARNBAL
- HIS_GARNRULE
- HIS_GARNSPEC
- HIS_LOCALTAX
- HIS_OPRDEFFS
- HIS_PAYCHECK
- HIS_PAYDEDCT
- HIS_PAYEARNS
- HIS_PAYERNVW
- HIS_PAYGROUP
- HIS_PAY_CHK_VW
- HIS_PAY_TAX
- HIS_POTHERVW
- HIS_PYGARNIS
- HIS_PYGRPSGPSBR
- HIS_PYOTHERN
- HIS_PYSPCLER
- HIS_SPCLEARN
- HIS_SPECLBAL

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- HIS_TAPYGRSBR
- HIS_TAXBALNC
- HIS_TXOPMYSBR
- RVH_ROLAVGEMPAU
- RVH_ROLAVGTBLAU
- RVH_RTETYPTBLAU

Fields:

- HIS_ACCOUNT_NBR
- HIS_ACCUMAPPLIESTO
- HIS_ADDLPAY_REASON
- HIS_ADDL_NBR
- HIS_ANN_FLAT_PCT
- HIS_ARREARS_BAL
- HIS_AUTO_ENROL
- HIS_BANK_ID
- HIS_BENEFIT_RCDNBR
- HIS_BEN_DELETE_ALL
- HIS_BEN_DELETE_CUR
- HIS_BRANCH_CODE
- HIS_CHECK_NBR
- HIS_COBRADEPENDENT
- HIS_COBRAEXPIRTNDT
- HIS_COBRA_EFFDT_DT
- HIS_COBRA_STATUS
- HIS_COBRA_STATUSDT
- HIS_COMMISSION_IND
- HIS_COMPANYTAXREF
- HIS_CPF_DEDUCT
- HIS_DEDCFEEMTDADJ
- HIS_DEDCFEEQTDADJ
- HIS_DEDCFEEYTDADJ
- HIS_DEDGARNMTDADJ
- HIS_DEDGARNQTDADJ
- HIS_DEDGARNYTDADJ
- HIS_DEDPFEEMTDADJ
- HIS_DEDPFEEQTDADJ

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- HIS_DEDPFEEYTDADJ
- HIS_DEDUCTCMPNYFEE
- HIS_DEDUCTGARNAMT
- HIS_DEDUCTPAYEEFEE
- HIS_DEDUCT_AMT
- HIS_DED_ADJ
- HIS_DED_CFEE_ADJ
- HIS_DED_CFEE_MTD
- HIS_DED_CFEE_QTD
- HIS_DED_CFEE_YTD
- HIS_DED_CLASS
- HIS_DED_CUR
- HIS_DED_CUR_PAYBK
- HIS_DED_CUR_REFUND
- HIS_DED_GARN_ADJ
- HIS_DED_GARN_MTD
- HIS_DED_GARN_QTD
- HIS_DED_GARN_YTD
- HIS_DED_MTD
- HIS_DED_MTD_ADJ
- HIS_DED_NOT_TAKEN
- HIS_DED_PFEE_ADJ
- HIS_DED_PFEE_MTD
- HIS_DED_PFEE_QTD
- HIS_DED_PFEE_YTD
- HIS_DED_QTD
- HIS_DED_QTD_ADJ
- HIS_DED_SUBSET
- HIS_DED_YTD
- HIS_DED_YTD_ADJ
- HIS_DIRECTDEPOSTFL
- HIS_DISABLED_DT
- HIS_EARN_FLAT_AMT
- HIS_EFT_CHARGETYPE
- HIS_EFT_COMM_AMT
- HIS_EMPLOYEEOCCURR

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- HIS_EMPLOYER_CPFNO
- HIS_EMPL_RCD
- HIS_ERNCDFORCLEANU
- HIS_ERNCDVACPAYOUT
- HIS_ERP_PAYMENT
- HIS_EVENT
- HIS_FLSAHRSWORKED
- HIS_GARNDEDLIMAMT
- HIS_GARNDEDMAXAMT
- HIS_GARNDEDOTHAMT
- HIS_GARN_DED_AMT
- HIS_GARN_DE_AMT
- HIS_GARN_PAY_MODE
- HIS_GARN_PROCESS
- HIS_GL_EXPENSEACCT
- HIS_GROUP_NBR
- HIS_GRS_ADJ
- HIS_GRS_MTD
- HIS_GRS_MTD_ADJ
- HIS_GRS_QTD
- HIS_GRS_QTD_ADJ
- HIS_GRS_YTD
- HIS_GRS_YTD_ADJ
- HIS_GST_PAYMENT
- HIS_HOL_HRS_SOURCE
- HIS_INCLUDEDFORQES
- HIS_IRAS_EARN_TYPE
- HIS_LINE_NUM
- HIS_MAXARRERSPAYBK
- HIS_NET_PAY
- HIS_NET_PAY_YTD
- HIS_NON_TAXABLE
- HIS_NOTIFICATIONDT
- HIS_NOTIFIEDBYLTTR
- HIS_OPT_OUT_RULE
- HIS_OPT_OUT_SGC

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- HIS_OTH_EARNS
- HIS_OTH_PAY
- HIS_OT_HRLY_EARNS
- HIS_PAGE_NUM
- HIS_PAYCHECKADJUST
- HIS_PAYMENT_TYPE
- HIS_PAYMONTHSPERYR
- HIS_PAYVIAEFTFLAG
- HIS_PAY_CALC_RULE1
- HIS_PAY_CALC_RULE2
- HIS_PAY_FREQUENCY
- HIS_PAY_FREQ_01
- HIS_PAY_FREQ_02
- HIS_PAY_FREQ_03
- HIS_PAY_REF_NBR
- HIS_PENSIONFUNDNM
- HIS_PLAN_TYPE
- HIS_PRORATPUBLCHOL
- HIS_QTRCD
- HIS_REASONNOTTAKEN
- HIS_REG_EARNS
- HIS_REG_FLATPCTOFF
- HIS_REG_FLAT_PCT_1
- HIS_REG_FLAT_PCT_2
- HIS_REG_FLAT_PCT_3
- HIS_REG_FLAT_PCT_4
- HIS_REG_FLAT_PCT_5
- HIS_REG_HRLY_EARNS
- HIS_REG_PAY
- HIS_REG_TAX_OFF
- HIS_REG_TAX_P1
- HIS_REG_TAX_P2
- HIS_REG_TAX_P3
- HIS_REG_TAX_P4
- HIS_REG_TAX_P5
- HIS_RULE_EFFECT

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- HIS_SGP_SECTOR
- HIS_SPCL_EARNS
- HIS_SUBJECT_HECS
- HIS_SUBJECT_LUMP_A
- HIS_SUBJECT_LUMP_B
- HIS_SUBJECT_LUMP_C
- HIS_SUBJECT_LUMP_D
- HIS_SUBJECT_LUMP_E
- HIS_SUBJECT_LV_BNS
- HIS_SUBJECT_OTHER
- HIS_SUBJECT_SFSS
- HIS_SUFFIX
- HIS_TAATTENDANCETP
- HIS_TACONFIRMFLAG
- HIS_TAKE_FLAT_AMT
- HIS_TAMINCLOKENTRY
- HIS_TAREJCTINTERVL
- HIS_TASHIFTTOTRANC
- HIS_TATIMECLOCKIND
- HIS_TAX_AGG
- HIS_TAX_CLASS
- HIS_TAX_CUR
- HIS_TAX_METHOD
- HIS_TAX_MTD
- HIS_TAX_NOT_TAKEN
- HIS_TAX_QTD
- HIS_TAX_YTD
- HIS_TA_CREATE_GAP
- HIS_TA_DISPLAYFLAG
- HIS_TA_EFF_STATUSO
- HIS_TA_IND
- HIS_TA_MIN_GAP
- HIS_TOTAL_DEDUCTNS
- HIS_TOTAL_GROSS
- HIS_TOTAL_TAXES
- HIS_TOT_DEDNS_YTD

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- HIS_TOT_GROSS_YTD
- HIS_TOT_TAXES_YTD
- HIS_TREAT_ASANNUAL
- HIS_TXGRS_AGG
- HIS_TXGRS_CUR
- HIS_TXGRS_MTD
- HIS_TXGRS_QTD
- HIS_TXGRS_YTD
- HIS_USE_COMPRATE
- HIS_USE_JOB_DIST
- HIS_YEAR_TYPE
- HIS_ZIP
- RVH_EMPL_RCD
- RVH_EXCLUDE_LEAVE
- RVH_NUM_OF_WEEKS
- RVH_RATE_TYPE
- RVH_REG_EARNS
- RVH_REG_HRS
- RVH_ROLLINGAVGTYPE
- RVH_USE_COMPRATE

All Translate Values for the following fields:

- HIS_ACCUMAPPLIESTO
- HIS_ADDLPAY_REASON
- HIS_COBRA_STATUS
- HIS_COMMISSION_IND
- HIS_DED_CLASS
- HIS_EFT_CHARGETYPE
- HIS_GARN_PAY_MODE
- HIS_HOL_HRS_SOURCE
- HIS_INCLUDEDFORQES
- HIS_IRAS_EARN_TYPE
- HIS_PAYMENT_TYPE
- HIS_PAY_FREQUENCY
- HIS_PAY_FREQ_01
- HIS_PLAN_TYPE
- HIS_QTRCD

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- HIS_REASONNOTTAKEN
- HIS_REG_TAX_OFF
- HIS_REG_TAX_P1
- HIS_REG_TAX_P2
- HIS_REG_TAX_P3
- HIS_REG_TAX_P4
- HIS_REG_TAX_P5
- HIS_RULE_EFFECT
- HIS_SGP_SECTOR
- HIS_TACONFIRMFLAG
- HIS_TAX_CLASS
- HIS_TAX_METHOD
- HIS_TA_CREATE_GAP
- HIS_TA_DISPLAYFLAG
- HIS_TA_EFF_STATUSO
- HIS_YEAR_TYPE
- RVH_RATE_TYPE

Pages:

- HAU_BALANCSCHK1AUS
- HAU_BALANCSCHK2AUS
- HAU_PAY_CHECK_E_AU
- HIST_CRSE_ENROLLMT
- HIST_CRSE_TRNS_TXT
- HIS_BALANCESARRERS
- HIS_BALANCES_ARR
- HIS_BALANCSDED1AUS
- HIS_BALANCSDED2AUS
- HIS_BALANCSERN1AUS
- HIS_BALANCSERN2AUS
- HIS_BALANCSGRN1AUS
- HIS_BALANCSGRN2AUS
- HIS_BALANCSSPC1AUS
- HIS_BALANCSSPC2AUS
- HIS_BALANCSTAX1AUS
- HIS_BALANCSTAX2AUS
- HIS_EMPL_COMP_SBP

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- HIS_PAY_CHECK_D
- HIS_PAY_CHECK_G
- HIS_PAY_CHECK_S
- HIS_PAY_CHECK_T_AU
- HIS_PERS_SRCH_SBP
- RVH_EMPL_SRCH_SBP
- RVH_ROL_AVG_EMPLAU

Menu:

HAU_PAYROLL_HISTORY

Components:

- HAU_BALANCES_CHK
- HAU_BALANCES_DED
- HAU_BALANCES_ERN
- HAU_BALANCES_GRN
- HAU_BALANCES_SPC
- HAU_BALANCES_TAX
- HAU_BAL_ARREARS
- HAU_PAY_CHECK
- RVH_ROL_AVG_EMPL

Record PeopleCode:

- HIS_BLADJARR.HIS_ARREARS_BAL event RowInit
- HIS_DERIVDHR.OPRID event RowInit
- HIS_PAY_TAX.STATE event RowInit

View SQLs:

- HIS_PAYERNVW
- HIS_PAY_CHK_VW
- HIS_POTHERVW

Permission Lists:

HCCPHR9010

Portal Registry Structure:

- EMPLOYEE C, HAU_ARRERS_BAL
- EMPLOYEE C, HAU_BALANCES_CHK
- EMPLOYEE C, HAU_BALANCES_DED
- EMPLOYEE C, HAU_BALANCES_ERN
- EMPLOYEE C, HAU_BALANCES_GRN

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- EMPLOYEE C, HAU_BALANCES_SPC
- EMPLOYEE C, HAU_BALANCES_TAX
- EMPLOYEE C, HAU_PAYCHECK
- EMPLOYEE C, RVH_ROLLING_AVERAGE
- EMPLOYEE F, HC_UPGRADE_ROLLING_HISTORY_DAT
- EMPLOYEE F, HC_UPG_PAYRO

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APPENDIX G

Reviewing HRMS Changes

This appendix discusses:

- Reviewing Record and Field Conversions
- Reviewing Records with Duplicate Key Structures
- Reviewing the National ID Expiration Record
- Reviewing Schedule Defaults

Task G-1: Reviewing Record and Field Conversions

This section discusses:

- Understanding Record and Field Conversions
- Reviewing Profile Management Table Deletions

Understanding Record and Field Conversions

This section discusses a number of columns in your database that will be converted during the upgrade but will need some functional analysis performed prior to or after running the data conversion scripts. Review the items below to determine if you want to modify the delivered scripts prior to running them.

Task G-1-1: Reviewing Profile Management Table Deletions

In the new release Profile Management is a central repository for all profile information. Employee accomplishments, competencies and career planning mobility information are now stored in Profile Management in person profiles. Competency Management Roles and Clusters are and Job profiles are also stored within Profile Management as non-person profiles.

Profile Types within the new release determine the information that is stored and in what format. The upgrade creates new profiles for existing definition in profile types delivered with the product. The conversions will create the profile in profile types as follows.

This table lists the old release information and corresponding new profile type:

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Old Release Information	New Profile Type
Competencies Records: • COMPETENCIES • NVQ_REVIEW • ELEMENTS • CM_EVALUATIONS • CM_ELEMENT_DTL	PERSON
Accomplishments Records: • ACCOMPLISHMENT • SCHOOL_EDUCAT • EDUC_AREA_STUDY • SPECL_PROJECT • EG_SPECIAL_PRJ	PERSON
Career Planning Mobility Records: • OBSTACLES_MOBIL • GEOG_PREF_US • GEOG_PREF_INTL	PERSON **Note.** Only one obstacle to mobility and three US and International preferences will be converted per EMPLID.
CM Roles Records: • CM_ROLE • CM_ROLE_COMPS • CM_ROLE_ACCOMPS	ROLE **Note.** ROLE profiles are now syndicated from CLUSTER profiles. See *PeopleSoft HR 9.1PeopleBook: Manage Profiles*
CM Clusters Records: • CM_CLUSTER_TBL • CM_CLUSTER_LANG • CM_CLUSTER_COMP • CM_CLUSTER_ACMP	CLUSTER
Job Profiles Records: • JPM_PROFILE • JPM_PROF_LANG • JPM_PROF_REVW • JOB_PROF_COMP • JOB_PROF_SUB • JOB_PROF_QUAL	JOB

During the upgrade to Profile Management, there is data that will not be upgraded and thus will be not be in the new release. There is no action for you to take, as this data cannot fit into the new Profile Management model. Some of these tables contain related language data. The following tables are affected:

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- CM_EVALUAT_LNG
- CM_ELEM_DTL_LNG
- ACCOMPLISH_LANG
- SCHL_EDUC_LANG
- NVQ_REVIEW_LNG

Task G-2: Reviewing Records with Duplicate Key Structures

In the PeopleSoft 7.5 release, the records listed below had keys that were defined as duplicate keys. In the PeopleSoft 8.3 release, the duplicate key structure was removed from these records. Where a PeopleSoft 7.5 record has duplicate keys, the data conversion will eliminate all but the first row that it retrieves. If you want to preserve this data, you may run the following SQL, which will return all rows where the duplicate key condition is met. These SQLs need to be run on your current (old) database before the PeopleSoft PeopleTools conversion takes place.

- INTERVIEW

```
SELECT *
FROM PS_INTERVIEW B
WHERE EXISTS (SELECT 'X' FROM PS_INTERVIEW B2
WHERE B.EMPLID = B2.EMPLID
AND B.JOB_REQUISITION# = B2.JOB_REQUISITION#
AND B.POSITION_NBR = B2.POSITION_NBR
AND B.SETID = B2.SETID
AND B.JOBCODE = B2.JOBCODE
AND B. INTERVW_DT = B2.INTERVW_DT
AND B2.FINAL_RECOMMENDATN = 'Y'
GROUP BY B2.EMPLID, B2.JOB_REQUISITION#, B2.POSITION_NBR, B2.SETID, B2.JOBCODE
HAVING COUNT (*)>1)
```

- APPLICATN_ROUTE

```
SELECT*
FROM PS_APPLICATN_ROUTE B
WHERE EXISTS (SELECT 'X' FROM PS_APPLICATN_ROUTE B2
WHERE B.EMPLID = B2.EMPLID
AND B.JOB_REQUISITION# = B2.JOB_REQUISITION#
AND B.POSITION_NBR = B2.POSITION_NBR
AND B.SETID = B2.SETID
AND B.JOBCODE = B2.JOBCODE
AND B.ROUTE_DT = B2.ROUTE_DT
AND B.ROUTE_TO_ID = B2.ROUTE_TO_ID
GROUP BY B2.EMPLID, B2.JOB_REQUISITION#, B2.POSITION_NBR, B2.SETID, B2.JOBCODE,
B2.ROUTE_DT, B2.ROUTE_TO_ID
```

- OFFER

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```
SELECT *
FROM PS_OFFER B
WHERE EXISTS (SELECT 'X' FROM PS_OFFER B2
WHERE B.EMPLID = B2.EMPLID
AND B.JOB_REQUISITION# = B2.JOB_REQUISITION#
AND B.POSITION_NBR = B2.POSITION_NBR
AND B.SETID = B2.SETID
AND B.JOBCODE = B2.JOBCODE
```

Task G-3: Reviewing the National ID Expiration Record

In the new PeopleSoft release, the National ID expiration record, PERS_NID_EXP used to store Canadian expiration dates, now only contains data for National ID rows that have an expiration date. If an expiration date does not exist, a row will not be stored in this record as it was in previous releases. If you have customized views or reports that rely on a one-to-one relationship between a Canadian National ID row in PERS_NID and PERS_NID_EXP this change will affect you.

Task G-4: Reviewing Schedule Defaults

This section discusses:

- Reviewing Shift and Workdays Upgrade
- Determining the Effective Date of Schedule Definitions
- Reviewing Schedule Override Tables

Task G-4-1: Reviewing Shift and Workdays Upgrade

Review the list below to see how the upgrade modified shifts and workdays.

- The effective dates of the shift IDs and workday IDs are set to the earliest effective date from the schedule definition in which they are used, only if the schedule definition has an earlier effective date than that of the shift or workday.
- The setIDs are set to the setID of the schedule definition in which they are used.
- If the shifts and workdays are used in multiple schedule definitions with different setIDs, a copy of the shift and workday is created for each of the setIDs.

Task G-4-2: Determining the Effective Date of Schedule Definitions

The upgrade process determines the effective date of the schedule definitions. It begins by determining the minimum effective date in the locations where the schedule ID is used. This is called the “First Date Used.” You can check for the use of the schedule ID in the following locations:

- Assign Work Schedule (SCH_ASSIGN) as the schedule ID or the alternate schedule ID

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- Global Payroll Paygroup (GP_PYGRP_DTL) as the schedule ID or the alternate schedule ID
- Workgroup (TL_WRKGRP_TBL) as the schedule ID

Follow the steps below to determine the effective date of the schedule definition.

To determine the effective date:

1. Check the last date that was built for the schedule ID from the Schedule Calendar (SCH_CLND_TBL) by checking the View Schedule Calendar page in the source database.
2. Determine the number of days for that schedule definition.

   This process is done after converting the rest of the schedule definition so the number of days in the schedule is already determined.
3. Add one day, then start subtracting the number of days for that schedule definition to get the start day of the last schedule pattern of the Schedule Calendar.
4. Continue subtracting by the number of days for that schedule until the system derives the date on or before the First Date Used determined earlier.

For example, Schedule ID KUSCHDFP1 has a First Date Used=Schedule ID KUSCHDFP1.

- 1/1/1980 is the earliest effective date used in a Workgroup KUWRKGRP1.
- 9/25/1982 is the earliest effective date used for EmplID KU0020 in SCH_ASSIGN as Schedule ID. The last date of the schedule calendar for KUSCHDFP1 Schedule Definition = 12/30/2006 from the PS_SCH_CLND_TBL. Add one day, then subtract the number of days in the schedule (Duration of schedule = seven days) from 12/31/2006 = 12/24/2006. Continue subtracting the number of days in the schedule until you get a date to begin the schedule pattern, which is on or before the First Date Used = 12/30/1979 = Sunday.

Task G-4-3: Reviewing Schedule Override Tables

The following list explains how the schedule override tables are upgraded in the new PeopleSoft release:

- Shift ID has been added to SCH_MNG_SCH_TBL, which was the storage table for the override schedule workday. The shift ID will be populated using details from the old workday.
- If workday had consisted of more than one shift, than a new row would be inserted into SCH_MNG_SCH_TBL for each of the shifts, whether a primary or alternate workday override.
- The Sched Hrs, Sch Config Totals, and Start and End Time values are all populated using details from the shift tables.
- The setID is set to the setID of the workday.
- If there is an alternate workday override from PeopleSoft 8 SP1, there will be another row in the SCH_MNG_SCH_TBL for the alternate override.
- The SCH_MNG_SCH_TBL is now populated for any third party overrides that exist in SCH_ADHOC_DTL. (In previous PeopleSoft releases any scheduling third-party interface populated only SCH_ADHOC_DTL.)
- The SCH_ADHOC_DTL table is now also populated for the alternate as well as the primary schedule overrides, using details from the shift table. (In previous PeopleSoft releases, this was only populated for primary workday overrides.)

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APPENDIX H

Reviewing Tablespaces

This appendix discusses:

- Understanding Tablespace Review
- Reviewing PeopleSoft 8.9 MP1 Table Names

Understanding Tablespace Review

This appendix lists the tables that previously existed in 4K page size tablespaces that now reside in 32K page size tablespaces in the new release.

Task H-1: Reviewing PeopleSoft 8.9 MP1 Table Names

Review the following PeopleSoft 8.9 MP1 tables:

- HR_SSTEXT_TEXT
- EP_APPR_ITEM
- EP_AP_ITM_TMP
- EP_CHK_SUG_LANG
- EP_CHK_SUG_TBL
- GPIT_EFT_ATTACH
- UPG_APPL_RES

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APPENDIX I

Reviewing Time and Labor Integration with Absences

This appendix discusses:

- Understanding Time and Labor Integration with Absence
- Reviewing Online Changes
- Reviewing Batch Changes
- Reviewing Absence Changes for PNA Employees

Understanding Time and Labor Integration with Absence

In PeopleSoft 9.0, the integration of Time and Labor with Absence Management has been modified. The impact of these changes is reflected in the Timesheet, Launch Pad, Time Administration processing, and the manager's Calendar Views and Manage Schedule pages.

Prior to PeopleSoft 9.0, once the Absence Event was reported in the Absence Management application, it was written to GP_ABS_EVENT_WRK (a "work" record). Then, another Application Engine was triggered to bring that Absence information into Time and Labor, which was stored in TL_RPTD_TIME table (Absence rows in TL_RPTD_TIME table had RT_SOURCE = 'AM'). In PeopleSoft 9.0, the Absence data is visible within Time and Labor in a more real-time display. To achieve this, Time and Labor takes the Absence data directly from the Absence Event Table and displays the Absence information.

See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*.

Task I-1: Reviewing Online Changes

The following online changes have been made to integrate Time and Labor with Absence.

- The Application Engine program TLAGGUPDATE is no longer used.
- Once an absence is reported, it is no longer stored in the intermediate "work" table.
- All the existing Absence data will be deleted from the TL_RPTD_TIME table.

  The upgrade process will delete the data from the TL_RPTD_TIME table where RT_SOURCE ='AM'. If you want to create a backup of the rows that will be deleted, you can use the following SQL to export the data:

```
EXPORT FROM TL_RPTD_TIME WHERE RT_SOURCE = 'AM';
```

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Note. This SQL should be run using the database query tool. There are no online pages in the new release that will give you access to this data.

- All the Absence data (RT_SOURCE = 'AM') from the Audit tables will be deleted.
- Data from the TL_RULES_OVRD table is not deleted.

  You need to review the "AM" data and take appropriate action with the Absence data.
- The display of Absence data in PeopleSoft 9.0 depends on the configuration option for the Take code reported with absences.

  Take codes in Absence are defined at the country level. Therefore the configuration for one Country-Take code could be different from another Country-Take code. To resolve the absences for an employee, first determine the employee's country and then get the Take code configuration for that country to determine whether the absence reported for off days and holidays are to be considered as an absence or not.
- For Absence data to be displayed in Time and Labor, these requirements must be met:
  - An employee must be enrolled in Time and Labor.
  - The Take code must be mapped to the TRC (with the Absence option selected on the TRC definition).
  - Absence hours must be greater than zero.
  - If an absence is reported for an off day or holiday, the Take code must be configured to include the absence.
- In PeopleSoft 9.0, you can also report Absence data on the Timesheet page.

  See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook.*

Task I-2: Reviewing Batch Changes

Because absences are no longer stored in TL_RPTD_TIME, the batch processes of TL_MASS_TIME and TL_TIMEADMIN will derive the Absence data from the GP_ABS_EVENT record and calculate their respective values accordingly. Please refer to PeopleSoft 9.0 PeopleBooks for more details on the batch processing flow changes.

In PeopleSoft 9.0, the translate value *C – Changed* for the field EXCEPTION_STATUS has been deleted. This impacts the record TL_EXCEPTION. The upgrade process will update all values of *C* to *U – Unresolved* for the record TL_EXCEPTION.

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Task I-3: Reviewing Absence Changes for PNA Employees

In PeopleSoft 8.9, Absence sent data to Time and Labor using a Component Interface. This data was inserted into Reported Time (TL_RPTD_TIME). There may be cases in which the Absence data has not yet been processed and still remains in Reported Time. Therefore, before processing the upgrade step to update RT_SOURCE in TL_PAYABLE_TIME (UPG_TL89.HCTLT01), you should run the Time Administration process to generate Payable Time for Absence data from the Reported Time. If you do not run the Time Administration process, the Absence data from the Reported Time will be deleted from section UPG_TL89.HCTLT03 and there is no other way to generate Absence data in Payable Time from Time and Labor. An SQR report (PUTLK01) will be provided that lists all Absence data that is in Reported Time and has not yet been generated as Payable Time. This will help you identify which employees to enter in the Time Administration process.

There may be exceptions generated from the Time Administration process that prevent the Absence reported time to be created in Payable Time. In this case, you need to address these exceptions before continuing with the upgrade process. If you do not want to address the exceptions, you can select the Continue with Exceptions check box from the Time and Labor Installation page before running the Time Administration process.

After running the Time Administration process, it is recommended that you run the SQR report again to see if there is still Absence time that has not yet been generated as Payable Time. If the report still shows any rows, you need to either fix or skip the exceptions, rerun the Time Administration process, and then check the report again. You should repeat this process until there are no more rows listed on the report.

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APPENDIX J

Sizing Tables for the Upgrade

Task J-1: Sizing Tables

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors. The following lists these new tables with information about how to size them relative to the size of your existing data. This information is meant to give you a rough estimate on an initial size so you can execute the conversion programs without errors.

The following table lists the product code and corresponding new tables with rough sizing instructions:

Product Code	Table Populated During Upgrade	Estimate of Number of Rows of Data Inserted
BN	PS_BN_FORM_DEF	Approximately 1-10 rows for each parent PS_BN_FORMULA row.
BN	PS_BN_FORMULA	Approximately the same number of rows as PS_LIFE_ADD_TBL and PS_DISBLTY_PLN_TBL combined.
BN	PS_BN_RATE_DATA	Approximately the same number of rows as PS_FLAT_RATE_TBL, PS_SALARY_RATE_TBL, PS_SVC_COVG_TBL, and 2 x PS_AGE_COVG_TBL (for Smoker vs Non-smoker) combined.
BN	PS_BN_RATE_TBL	Will have the same number of rows as PS_AGE_RATE_TBL, PS_FLAT_RATE_TBL, PS_SALARY_RATE_TBL, and PS_SVC_RATE_TBL combined.
BN	PS_BN_RATE_TBL_LNG	For each row in parent PS_BN_RATE_TBL, will have one row for each non-base language supported by the client.
BN	PS_ENROLL_EXCEPTN	Rows with withdrawal dates from PS_SAVINGS_MGT_EE.

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Product Code	Table Populated During Upgrade	Estimate of Number of Rows of Data Inserted
PY	PS_GARN_EXEMPT_TBL	This is not a new table. However, upgrade processes will insert many additional rows during data conversion. It will contain a summary of rows for U.S. and Canadian garnishment rules maintained by PeopleSoft (defined as system data), plus all custom rows for U.S. and/or Canadian garnishment rules that have been added in the prior release.
PY	PS_GARN_OPERANDS	This is not a new table. However, upgrade processes will insert many additional rows during data conversion. It will contain a summary of rows for U.S. and Canadian garnishment rules maintained by PeopleSoft (defined as system data), plus all custom rows for Canadian garnishment rules defined in the Copy of Production, plus 6 rows on average for each custom U.S. garnishment rule from the Copy of Production database.
GP ES	PS_GPES_CNTRB_RSLT	The same number of rows as the following: PS_GP_RSLT_ACUM WHERE PIN_NUM = (SELECT PIN_NUM FROM PS_GP_PIN WHERE PIN_CODE = 'SS AC BSE CC NRM S ESP') AND (A.EMPL_RCD = A.EMPL_RCD_ACUM OR ACM_TYPE = 'N')
GP ES	PS_GPES_TAX2_RSLT	Same number of rows as in the GP accumulator results table for the element TAX AC DIN S
GP MX	PS_GPMX_INT_PARM	One row per company per year.
GP MX	PS_GPMX_INT_PAYEE	One row per payee.
GP MX	PS_GPMX_INT_P_DTL	Twenty–five rows per company per year.
PY	PS_HP_BUDACTLS_TMP	One row of data for each "REQ" record in PS_BUDGET_ACTUALS table.
HHP	PS_HP_CNTRACT_LIST	Maximum of two rows for each EmplID/Empl Rcd in PS_CONTRACT.

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Product Code	Table Populated During Upgrade	Estimate of Number of Rows of Data Inserted
HHP	PS_HP_CONTPAY_PARM	Maximum of two rows for each EmplID/Empl Rcd in PS_CONTRACT.
PY	PS_HP_DOC_ID_ARCH	One row of data for total encumbered amount per Doc ID, Doc Line Number, and Fiscal Year. The maximum number of rows could be the same as in PS_BUDGET_ACTUALS.
PY	PS_HP_DOC_ID_SUMM	One row of data for total encumbered amount per Doc ID, Doc Line Number, and Fiscal Year. The maximum number of rows could be the same as in PS_BUDGET_ACTUALS.
PY	PS_HP_DOC_ID_XREF	One row of data for each Doc ID and Doc Line Number. The maximum number of rows could be the same as in PS_BUDGET_ACTUALS.
PM	PS_JPM_CAT_GMEMB	The same number of rows as PS_COMPETENCY_TYPS.
PM	PS_JPM_CAT_GROUPS	The same number of rows as PS_CM_TYPE_TBL.
PM	PS_JPM_CAT_GRP_LNG	The same number of rows as PS_CM_TYPE_LANG.
PM	PS_JPM_CAT_IRD_LNG	The sum of the number of rows in the following: PS_CM_RATDESCR_LNG, PS_EP_SUBPROF_LANG
PM	PS_JPM_CAT_I_RLAT	Two times the sum of the number of rows in the following: PS_CM_ELM_CRITERIA, PS_COMPETENCY_ELEM, PS_EP_SUB_COMP_TBL, PS_NVQ_UNITS_REQ
PM	PS_JPM_CAT_ITEM_RD	The sum of the number of rows in the following: PS_CM_RATING_DESCR, PS_EP_SUB_PROF_TBL

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Product Code	Table Populated During Upgrade	Estimate of Number of Rows of Data Inserted
PM	PS_JPM_CAT_ITEMS	There will be approximately the same number of rows as the number of rows in the following tables combined: PS_ACCOMP_TBL, PS_COMPETENCY_TBL, PS_EDLVL_ACHV_TBL, PS_EP_GOAL_TBL, PS_EP_MISSION_TBL, PS_EP_RESP_TBL, PS_EP_INIT_TBL, PS_EP_SUB_COMP_TBL, PS_CM_ELEMENT_TBL, PS_CM_CRITERIA_TBL
PM	PS_JPM_CAT_ITM_LNG	The sum of the number of rows in the following: PS_ACCOMP_TBL_LANG, PS_CM_CRITERIA_LNG, PS_CM_ELEMENT_LNG, PS_COMPETENCY_LANG, PS_EDLVL_ACHV_LNG, PS_EP_GOAL_LANG, PS_EP_INIT_LANG, PS_EP_MISSION_LANG, PS_EP_RESP_LANG, PS_EP_SUBCOMP_LANG
PM	PS_JPM_JP_ITEMS	There will be approximately the same number of rows as the number of rows in the following tables combined: PS_ACCOMPLISHMENTS, PS_COMPETENCIES, PS_SCHOOL_EDUCAT, PS_CM_EVALUATIONS, PS_EDUC_AREA_STUDY, PS_SPECL_PROJECT, PS_EG_SPECIAL_PRJ, PS_JOB_PROF_RESP, PS_JOB_PROF_COMP, PS_JOB_PROF_QUAL (8.9 path only), PS_CM_ CLUSTER_COMP, PS_CM_CLUSTER_ACMP, PS_CM_ROLE_COMPS, PS_CM_ROLE_ACCOMPS Plus one row for each Emplid in PS_CAREERPLAN
PM	PS_JPM_JP_SYND_SRC	The number of rows will be the same as the number of cluster profiles syndicated to role profiles.

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Product Code	Table Populated During Upgrade	Estimate of Number of Rows of Data Inserted
PM	PS_JPM_JP_X_RLAT	There will be approximately one row in this table for each row from these conditions: • There will be one row for each unique EMPLID across the following tables: PS_ACCOMPLISHMENTS, PS_COMPETENCIES, PS_SCHOOL_EDUCAT, PS_EDUC_AREA_STUDY, PS_SPECL_PROJECT, PS_EG_SPECIAL_PRJ, PS_CAREERPLAN • One row for each row in the following tables: PS_JOB_PROFILE_TBL, PS_CM_ROLE, PS_CM_CLUSTER
PM	PS_JPM_PROFILE	There will be approximately one row in this table for each row from these conditions: • There will be one row for each unique EMPLID across the following tables: PS_ACCOMPLISMENTS, PS_COMPETENCIES, PS_SCHOOL_EDUCAT, PS_EDUC_AREA_STUDY, PS_SPECL_PROJECT, PS_EG_SPECIAL_PRJ, PS_CAREERPLAN • One row for each row in the following tables: PS_JOB_PROFILE_TBL, PS_CM_ROLE, PS_CM_CLUSTER
PM	PS_JPM_PROFILE_LNG	The sum of: 1) DISTINCT JOB_PROFILE_ID, LANGUAGE_CD FROM PS_JOB_PROF_LANG 2)PS_CM_CLUSTER_LANG 3) PS_CM_TYPE_LANG
HC	PS_MU_CHANGE_TBL	The latest results from PS_MU_MASSUPD_RSLT using max (LASTUPDDTTM).

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Product Code	Table Populated During Upgrade	Estimate of Number of Rows of Data Inserted
HC	PS_MU_SETUP_CHG	Maximum number of rows will be PS_MU_LEVEL01_DATA + (PS_MU_COMP_DATA x 11).
HC	PS_MU_SETUP_DTL	The same number of rows in row from PS_MU_MASS_UPD_TBL.
HC	PS_MU_SETUP_LNG	The same number of rows in PS_MU_MASS_UPD_LNG.
HC	PS_MU_SETUP_POP	The same number of rows in PS_MU_MASS_UPD_TBL.
HC	PS_MU_SETUP_TBL	The same number of rows in PS_MU_MASS_UPD_TBL.
HC	PS_MU_TP_TRANS_LNG	The number of latest rows based on LASTUPDDTTM from the join of PS_MU_ MASSUPD_RLNG, PS_RUNCTL_MASSUPD1, and PS_MU_MASSUPD_RSLT.
HC	PS_MU_TP_TRANS_LOG	The number of latest rows based on LASTUPDDTTM from the join of PS_ MU_MASSUPD_RSLT, PS_RUNCTL_MASSUPD1, and PS_MU_MASSUPD_RSLT.
HC	PS_MU_TP_TRANS_TBL	The latest results from PS_MU_MASSUPD_RSLT using max (LASTUPDDTTM).
HHP	PS_UPG_ADDLPAY_TAO	Maximum of three rows for each EmplID/Empl Rcd in PS_CONTRACT whose payments have started (employee has contract earnings code(s) in PS_ADDL_PAY_DATA with amount other than zero).
HHP	PS_UPG_CNTRACT_TAO	The same number of rows as PS_CONTRACT.
HHP	PS_UPG_CONTPAY_TAO	Maximum of two rows for each EmplID/Empl Rcd in PS_CONTRACT.
PY	PS_UPG_HASH21_TAO	Combined number of unique FDM_HASH values from PS_VALID_COMBO_TBL and PS_ACCT_CD_TBL.
PY	PS_UPG_PCS_ACD_TBL	The same number of rows as PS_ACCT_CD_TBL.
PY	PS_UPG_PCS_VCB_TBL	The same number of rows as PS_VALID_COMBO_TBL.
GP ES	PS_UPG_TXRSLT_GPES	The same as number of rows as in PS_GPES_TAX_RSLT.

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APPENDIX K

Understanding Garnishments Changes

This appendix discusses:

- Understanding Garnishments Upgrade
- Understanding Payee Changes
- Understanding Rules Changes

Understanding Garnishments Upgrade

In PeopleSoft 9, we enhanced Garnishments functionality, which impacted the following areas:

- Garnishment Payee Data
- Garnishment Rule Data

The Location field was added to the payee data stored on the garnishment order to enhance processes that create invoices for paid orders. You will notice this change when you are creating new garnishment orders, whether you are using U.S. Payroll or Canadian Payroll. However, the upgrade related to this change is mandatory only if you are using our AP Interface functionality to create invoices.

Several changes were made in the way U.S. garnishments rules are stored, which you will notice if you are using U.S. Payroll or Federal Payroll to set up or review garnishments rules. There is no change in the way that we store Canadian garnishments rules. However, due to the fact that garnishments rules tables store data for U.S. and Canadian rules, and may store rules maintained by you in addition to the rules we deliver, even if you only use Canadian Payroll, your garnishments data will be processed by some upgrade tasks. This was the only way for us to deliver a generic upgrade that will work for any combination of data a user might have.

Task K-1: Understanding Payee Changes

This section discusses:

- Understanding Changes to Payee Data
- Updating Payee Data During the Initial Pass
- Updating Payee Data During Move to Production

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Understanding Changes to Payee Data

If you are using AP Interface to create an invoice for the payee, you have to store payee data in the garnishment order. The payee data must exist in the Payee Table in order to be entered into the garnishment order. When you enter the payee data, the payee's address details will be added to the garnishment order, but it will not be used in any further processing. When the invoice and the voucher are created, the data sent to Accounts Payable does not contain the details about the payee's address; instead, it only has key information from the Payee Table that will allow AP processes to find the details on their side. This processing is based on the assumption that the Payee Table is synchronized on both sides, and it was designed in such way to avoid sending unnecessary information.

In PeopleSoft 9, we have added the Location field to the garnishment order (GARN_SPEC record) to ensure that we will send the correct keys to the AP side, which will in return find the correct address details when sending vouchers to the payees.

During the conversion, the location on the garnishment order will be updated with the default location from the Payee Table. However, in some cases that might not be enough to complete the upgrade correctly. The following scenarios are possible:

- Some of your payees might be set up with different invoicing and remitting VendorIDs.
- Some of your payees might have multiple locations.

If you have any payees with either of the above setup scenarios, we will need your input to complete the upgrade.

Following are simplified tasks related to garnishment payee data, which you can perform during the upgrade.

Task K-1-1: Updating Payee Data During the Initial Pass

To update garnishment payee data during the Initial pass:

1. Run the Garnishment Payee Audit Report.
2. Review the report listing and fix any garnishment order or payee setup for the payees that are referenced on the garnishment order, but do not exist in the Payee Table.

   See "Preparing Your Database for Upgrade," Running Application Audits, Correcting Garnishment Payee Data, Running the Garnishment Payee Audit Report.
3. Run conversion for the Garn Spec record.

   The conversion will perform the following updates:

   - Update the Location field on the Garn Spec record with the default location from the Payee Table.
   - Update the Location and Remit Address on the Garn Spec field with your input, which in this pass will not be available; therefore, there will be no updates.

     See the comments on the Upgrade Data Conversion page. Select HRMS, Upgrade, Data Conversion, and then select the Comments link for Update GARN_SPEC.
4. Run the EE Garn Payee Data Validation Report.
5. Review the report listing and decide what data needs your input to complete the conversion.

   See "Completing Database Changes," Validating EE Garn Payee Data.
6. Add your input for updating Garn Payee Data where needed.

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Note. These entries will be used in the subsequent pass during the conversion to update Garn Spec records.

See “Completing Database Changes,” Validating EE Garn Payee Data.

Task K-1-2: Updating Payee Data During Move to Production

To update garnishment payee data during the Move to Production pass:

1. Run the Garnishment Payee Audit Report.
2. Review the report listing and fix any garnishment order or payee setup for the payees that are referenced on the garnishment order, but do not exist in the Payee Table.

   See “Preparing Your Database for Upgrade,” Running Application Audits, Correcting Garnishment Payee Data, Running the Garnishment Payee Audit Report.
3. Run conversion for the Garn Spec record.

   The conversion will perform the following updates:

   - Update the Location field on Garn Spec record with the default location from the Payee Table.
   - Update Location and Remit Address on the Garn Spec field with your input, which in this pass will be available.

     See the comments on the Upgrade Data Conversion page. Select HRMS, Upgrade, Data Conversion, and then select the Comments link for Update GARN_SPEC.
4. Run the EE Garn Payee Data Validation Report.
5. Review the report listing and decide what data needs your input to complete the conversion. This report may contain data if you have created a new garnishment order between upgrade passes with a payee that does not exist on the Payee Table.

   See “Completing Database Changes,” Validating EE Garn Payee Data.
6. Add your input for updating Garn Payee Data where needed.

Note. These entries will be used in subsequent Move to Production passes during the conversion to update Garn Spec records. If this is the final Move to Production pass, you need to do manual updates directly in the Create Garnishment or Payee Table component because there will be no more conversions to take care of these entries.

See “Completing Database Changes,” Validating EE Garn Payee Data.

Task K-2: Understanding Rules Changes

This section discusses:

- Understanding Changes to Garnishment Rules
- Updating Rules During the Initial Pass
- Updating Rules During Move to Production

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Understanding Changes to Garnishment Rules

In PeopleSoft 9.0, we have changed the way that we store U.S. garnishment rules data. Even though there is no change to the way that we store Canadian garnishment rules data, due to the fact that all data is stored in the same set of setup tables, there will be some upgrade processing on your garnishments rules tables.

The garnishment rules tables may have the following rules:

- U. S. rules maintained and delivered by Oracle
- Canadian rules maintained and delivered by Oracle
- U.S. rules created and maintained by the user
- Canadian rules created and maintained by the user

You may not have all of the above data. You probably have the rules delivered by Oracle, and in addition, you might have some custom rules for either payroll. In order to ensure that the upgrade processing will work for any combination of data you may have, we decided to do the following conversion on garnishments rules tables:

- Rename garnishments rules tables in your Copy of Production.
- Export U.S. and Canadian rules maintained by Oracle from the New Release Demo database.

  There is no change to Canadian rules maintained by us, but re-delivering them was a better option than converting them from the renamed tables.
- Import U.S. and Canadian rules maintained by Oracle into your Copy of Production before the conversion.
- Copy Canadian custom garnishment rules, if you currently have any, from renamed tables into garnishments rules tables in your Copy of Production.

We are not going to do any conversion for the U.S. custom garnishment rules, if you currently have any. The changes that we made in garnishment rules tables would require a very complex upgrade with a high probability of creating invalid data in your tables. On the other hand, the flexibility in setting up the rules might allow you to replace your existing custom rule with a rule delivered by Oracle. Depending on whether you decide that you still need the U.S. custom rules or not, you may need to recreate the U.S. custom rules, or you may need to update garnishment orders to replace a U.S. custom rule with some other existing rule.

Following are simplified tasks related to rules changes, which you can perform during the upgrade.

Task K-2-1: Updating Rules During the Initial Pass

To update garnishment rules during the Initial pass:

1. Run the US Custom Garnishment Rule Audit Report.
2. Review the report listing and decide whether you need any of these rules in PeopleSoft 9.0.

   See “Preparing Your Database for Upgrade,” Running Application Audits, Running Upgrade Reports, Running US Custom Garnishment Rule Audit Report.
3. Run conversion for Garn Rule record (GARN_RULE).

   The conversion will update the State Law and Rule ID fields with your input, which in this pass will not be available; therefore, there will be no updates.

   See the comments on the Upgrade Data Conversion page. Select HRMS, Upgrade, Data Conversion, and then select the Comments link for Update GARN_RULE.
4. Set up US Custom Garnishment Rules.

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If you have any U.S. custom garnishments rules that you will need in new release, you will have to re-create them. You can set up the rule using the online component or you can clone any existing rule if the formula is similar to the rule you need to create. You can use the audit report to ensure that all data is set up the way you need it.

See “Completing Database Changes,” Setting Up US Custom Garnishment Rules.

5. Run the EE Garn Rule Data Validation Report.
6. Review the report listing and decide what data needs your input to complete the conversion, in case you want to replace an obsolete rule with an existing rule.

   See “Completing Database Changes,” Validating EE Garn Rule Data.
7. Add your input for updating rule data in garnishment orders, where needed.

Note. These entries will be used in the following pass during the conversion to update Garn Rule records.

See “Completing Database Changes,” Validating EE Garn Rule Data.

Task K-2-2: Updating Rules During Move to Production

To update rules during the Move to Production pass:

1. Run the US Custom Garnishment Rule Audit Report.
2. Review the report listing and decide whether you need any of these rules in PeopleSoft 9.0. Compare the report from the current and previous passes to see whether any new rules were added between upgrade passes.

   See “Preparing Your Database for Upgrade,” Running Application Audits, Running Upgrade Reports, Running US Custom Garnishment Rule Audit Report.
3. Run conversion for the Garn Rule record (GARN_RULE).

   The conversion will update the State Law and Rule ID fields with your input, which will be available in this pass if you added any.

   See the comments on the Upgrade Data Conversion page. Select HRMS, Upgrade, Data Conversion, and then select the Comments link for Update GARN_RULE.
4. Set up US Custom Garnishment Rules.

   If you have any new U.S. custom garnishments rules that you have set up between upgrade passes, and you have decided that you will need them in the new release, you must recreate them. You will have to do set up only for the U.S. rules newly added between the upgrade passes. All other U.S. rules set up in previous passes, will be taken care of by running the export/import scripts. You can set up the rule using the online component or you can clone any existing rule if the formula is similar to the rule you need to create. You can use the audit report to ensure that all data is set the way you need it.

   See “Completing Database Changes,” Setting Up US Custom Garnishment Rules.
5. Run the Export US Custom Garnishments Rules script.

   Run this script to export from your Copy of Production all U.S. custom garnishments rules that you have set up manually in the previous pass.

   See “Applying Application Changes,” Completing Application Processes, Exporting US Custom Garnishment Rules.

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6. Run the Import US Custom Garnishments Rules script.

   Run above script to import into your new Copy of Production all U.S. custom garnishments rules that you have set up manually in the previous pass.

   See “Applying Application Changes,” Completing Application Processes, Importing US Custom Garnishment Rules.

7. Run the EE Garn Rule Data Validation Report.
8. Review the report listing and decide what data needs your input to complete the conversion.

   This report may contain data if you have created a new garnishment order in between upgrade passes that references a rule that no longer exists in garnishment rules tables.

   See “Completing Database Changes,” Validating EE Garn Rule Data.

9. Add your input for updating rule data in garnishment orders, where needed.

   Note. These entries will be used in subsequent Move to Production passes during the conversion to update Garn Rule records. If this is the final Move to Production pass, you need to do manual updates directly in the Create Garnishment or Garnishment Rules Tables component, because there will be no more conversions to take care of these entries.

   See “Completing Database Changes,” Validating EE Garn Rule Data.

See *PeopleSoft Payroll for North America 9.1 PeopleBook.*

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APPENDIX L

Upgrading the Content Provider Registry

This appendix discusses:

- Understanding Content Provider Registry Upgrade
- Copying Your Portal Solutions Database
- Upgrading PeopleTools for Portal Solutions
- Updating Registry Permission Lists
- Creating the Portal Project
- Comparing the Portal Project
- Reviewing the Portal Project
- Copying the Portal Project
- Copying the Portal Project to Production
- Deleting Obsolete Folders
- Updating Registry Folder Permissions

Understanding Content Provider Registry Upgrade

You should perform this task if you use PeopleSoft Portal Solutions 8.4 or later running on PeopleSoft PeopleTools 8.50 or later with the full navigation load access method. This means that you do not use a single link to access your content provider database, but instead load some or all of the portal registry structures from the content provider database into your PeopleSoft Portal Solutions database. Oracle refers to its application databases that contain the transaction content as Content Provider databases. Your Copy of Production database is your Content Provider database for this task.

When you upgrade a content provider database, the registry structures are updated, removed, and added. These changes need to be copied to the PeopleSoft Portal Solutions database. This task will update the portal registry structures in your PeopleSoft Portal Solutions database to match what is in the Content Provider database. This is accomplished by the following:

- Upgrade the PeopleSoft PeopleTools on a copy of the PeopleSoft Portal Solutions database.

  This allows a project compare to run between the PeopleSoft Portal Solutions and the Content Provider database.

- Create a portal project in the PeopleSoft Portal Solutions database containing all of the existing Content Provider registry structures.

  Copy the portal project (definition only) to the Content Provider database.

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- Create a portal project in the Content Provider database containing all of the current Content Provider registry structures, then merge the project definition copied from the PeopleSoft Portal Solutions database into this project.

  You will have a complete list of all registry structures for the Content Provider, including what is current and what should be deleted.

- Compare the complete list of registry structures in the Content Provider database to what exists in the PeopleSoft Portal Solutions, using project compare.

  This marks the missing registry structures as *delete* and the updated or added registry structures as *copy* in the portal project definition.

- Copy the portal project from the Content Provider database to the PeopleSoft Portal Solutions database.

  This deletes, updates, and adds registry structures to the PeopleSoft Portal Solutions database, which syncs it up with what is current in the Content Provider database.

If you use PeopleSoft Portal Solutions 8 SP2, Oracle recommends that you upgrade your PeopleSoft Portal Solutions to the latest available release.

If you do upgrade your PeopleSoft Portal Solutions database, you must be on PeopleSoft PeopleTools 8.46 or later.

Note. If you use PeopleSoft Portal Solutions 8.4 you *do not* need to upgrade to PeopleSoft Portal Solutions 8.8. You can still upgrade to PeopleSoft PeopleTools 8.46 or later.

See Enterprise Portal 8.1x – Managing Information Architecture for additional information on this topic. Go to My Oracle Support and search for Enterprise Portal 8.1x – Managing Information Architecture.

In this appendix, you load your new Portal Registry definitions from your Copy of Production database to a copy of your PeopleSoft Portal Solutions database.

Note. You must complete the tasks in the appendix for each of your separately installed PeopleSoft Portal Solutions databases that correspond to one of the four Portal Registry definitions: EMPLOYEE, CUSTOMER, SUPPLIER, and PARTNER. If your installed PeopleSoft Portal Solutions uses all the registries, then complete this task for each of the portal registries using the same copy of the single PeopleSoft Portal Solutions database.

In the first task of this appendix, you create a copy of your PeopleSoft Portal Solutions database. You use this copy for all subsequent steps for the initial and test Move to Production upgrade passes. For the final Move to Production, do not make a copy. Instead perform the steps on the production PeopleSoft Portal Solutions database.

This document uses the term “target PeopleSoft Portal Solutions database” to refer to the PeopleSoft Portal Solutions database used in the upgrade steps.

Use the following table to determine the correct version of your PeopleSoft Portal Solutions database for each upgrade pass:

Upgrade Pass	Target PeopleSoft Portal Solutions Database
Initial pass	Copy of the PeopleSoft Portal Solutions database
Test Move to Production	Copy of the PeopleSoft Portal Solutions database
Final Move to Production	PeopleSoft Portal Solutions production database

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Task L-1: Copying Your Portal Solutions Database

You initially upgrade the Content Provider registry on a copy of your PeopleSoft Portal Solutions database, then test the results of the upgrade. During your test Move to Production, you perform this task against another Copy of the PeopleSoft Portal Solutions.

Create a copy of your current PeopleSoft Portal Solutions production database now. Use this database as your target PeopleSoft Portal Solutions database.

Note. During your final Move to Production, you copy the registry definitions directly to your PeopleSoft Portal Solutions production database. Therefore, you do not need to execute this step during your final Move to Production.

Task L-2: Upgrading PeopleTools for Portal Solutions

During the initial upgrade pass, your PeopleSoft Portal Solutions database must run on the same PeopleSoft PeopleTools release level as your Copy of Production database so that you can do the compare step. Because you do not need to run the compare step during your Move to Production passes, you can skip this task during Move to Production passes.

If the release level of PeopleSoft PeopleTools on your target PeopleSoft Portal Solutions database is not the same as your Copy of Production database release level, upgrade your PeopleSoft PeopleTools now.

Go to My Oracle Support and search for the PeopleSoft PeopleTools upgrade documentation for the new release.

Task L-3: Updating Registry Permission Lists

This section discusses:

- Understanding Registry Permission List Updates
- Updating the Portal Registry
- Deleting the Database Cache

Understanding Registry Permission List Updates

This task applies only to the initial upgrade pass.

Earlier in this upgrade you copied portal registry data from the Demo database to your Copy of Production database. You must update this registry data to include your permission list changes. After updating the portal registry permission lists, delete the database cache.

This process takes between a few minutes and a few hours, depending on the volume of the portal data.

Note. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

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Note. You must have a process scheduler started for your Copy of Production database.

Task L-3-1: Updating the Portal Registry

Follow the steps below to update your portal registry permission lists.

To update the portal registry permission lists:

1. On your Copy of Production database, select PeopleTools, Portal, Portal Security Sync.
2. Select the Add a New Value tab.
3. Add a run control as follows:
   a. Enter a value for the run control ID. The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER).
   b. Click Add.
4. Enter a value for the portal name.

   This value must match the portal registry name that you used to replace the *XXXX* in the run control ID.
5. Click Save.
6. Click Run.
7. Set up the process scheduler information and click OK.
8. Click the Process Monitor link to view the progress of the process.

Task L-3-2: Deleting the Database Cache

Follow the steps below to delete the database cache.

To delete the database cache:

1. Delete the Copy of Production database application server cache.
2. Stop and restart the Copy of Production database web server service.

Task L-4: Creating the Portal Project

This section discusses:

- Understanding Portal Project Creation
- Creating the Target Portal Solutions Project
- Cleaning the Target Portal Solutions Project
- Deleting the Target Portal Solutions Database Cache
- Copying the Target Portal Solutions Project Definition
- Creating the Copy of Production Portal Project
- Cleaning the Copy of Production Portal Project

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- Deleting the Copy of Production Database Cache

Understanding Portal Project Creation

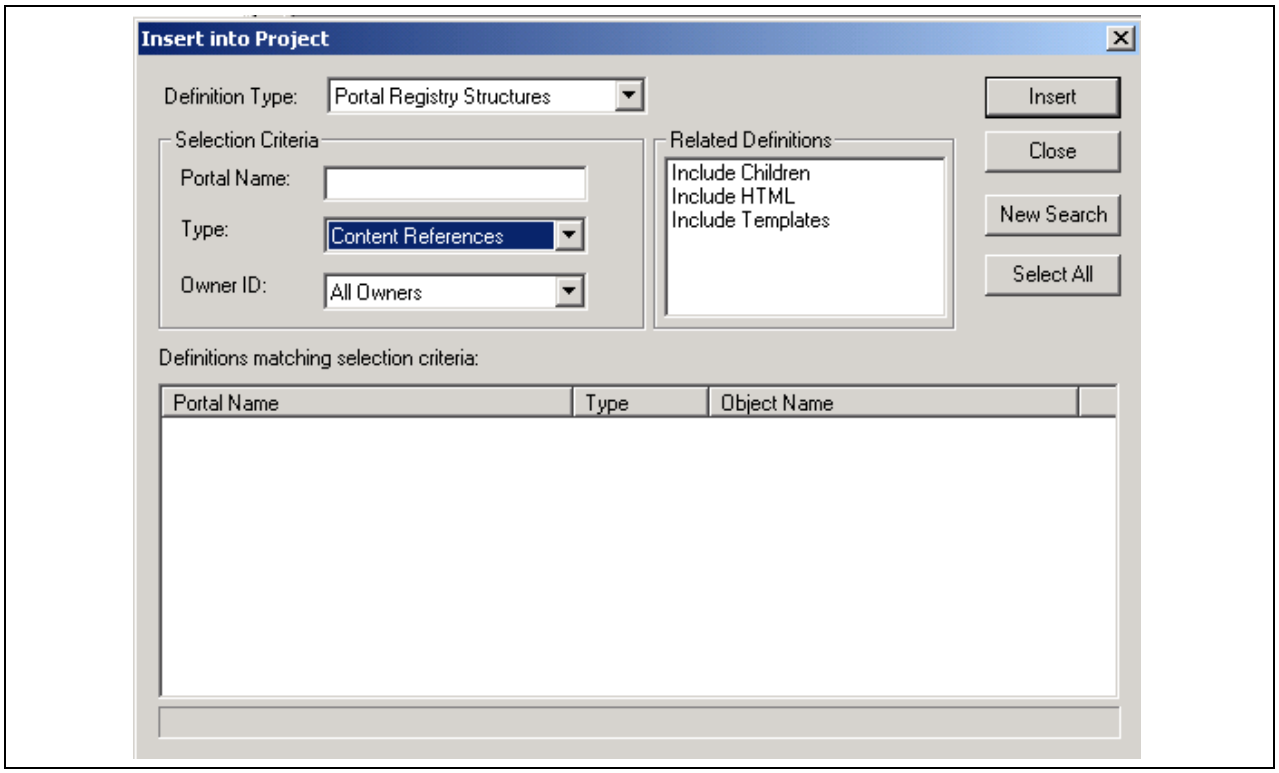
This task applies only to the initial upgrade pass. In this task, you create and modify a project on your target PeopleSoft Portal Solutions database. Then you copy the project definition to the Copy of Production database, where you further modify the project.

Task L-4-1: Creating the Target Portal Solutions Project

Follow the steps below to create the target PeopleSoft Portal Solutions project.

To create the target PeopleSoft Portal Solutions project:

1. Launch PeopleSoft Application Designer and sign in to your target PeopleSoft Portal Solutions database.
2. Select Insert, Definitions into Project…
3. Select the following values on the Insert into Project dialog box, as illustrated by this example:
   a. In the Definition Type field, select *Portal Registry Structures*.
   b. Leave the Portal Name field blank.
   c. In the Owner ID field, select *All Owners*.
   d. Do not select any values in the Related Definitions field, as shown in the following example:



Insert into Project dialog box

4. Click Insert.
5. Click Select All, and then click Insert again
6. Click Close.

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7. From PeopleSoft Application Designer, select File, Save Project As….
8. Enter the project name *PORTAL_PA84X_REGISTRY*.
9. Close PeopleSoft Application Designer.

Task L-4-2: Cleaning the Target Portal Solutions Project

In this step, you clean the target PeopleSoft Portal Solutions Project so that it contains only the existing Content Provider registry structure content references.

To clean the target PeopleSoft Portal Solutions project:

1. In your PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.

   Warning! Do not follow the instructions on the Clean Portal Project page. Instead, follow the instructions below.

2. Add the run control ID CLEAN_PORTAL_XXXXXXXX where XXXXXXXX represents the portal definition name: EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER for example.
3. In the Project Name field, enter the project name *PORTAL_PA84X_REGISTRY*.
4. Enter a value in the Portal Name field; *EMPLOYEE* for example.
5. Enter a value in the Content Provider Name field; *CRM* for example.

   Note. Before running the Clean Portal Project you must enter the node URI text for the message node that you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task L-4-3: Deleting the Target Portal Solutions Database Cache

In this step, you delete the target PeopleSoft Portal Solutions database cache.

To delete the target PeopleSoft Portal Solutions database cache:

1. On your target PeopleSoft Portal Solutions database, launch Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the target PeopleSoft Portal Solutions database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

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Task L-4-4: Copying the Target Portal Solutions Project Definition

In this step, you copy the target PeopleSoft Portal Solutions project definition to your Copy of Production database.

To copy the target PeopleSoft Portal Solutions project definition:

1. Using PeopleSoft Data Mover, sign in to your target PeopleSoft Portal Solutions database.
2. Run the following PeopleSoft Data Mover script:

   PS_APP_HOME\SCRIPTS\UVUPX10E.dms

3. Close PeopleSoft Data Mover.
4. Using PeopleSoft Data Mover, sign in to the Copy of Production database.
5. Run the following PeopleSoft Data Mover script:

   PS_APP_HOME\SCRIPTS\UVUPX10I.dms

6. Close PeopleSoft Data Mover.

Task L-4-5: Creating the Copy of Production Portal Project

Create a project containing all Portal Registry data on your Copy of Production database.

To create the Copy of Production Portal project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Insert, Definitions into Project….
3. In the Definition Type field, select *Permission Lists*, as shown in the following example:

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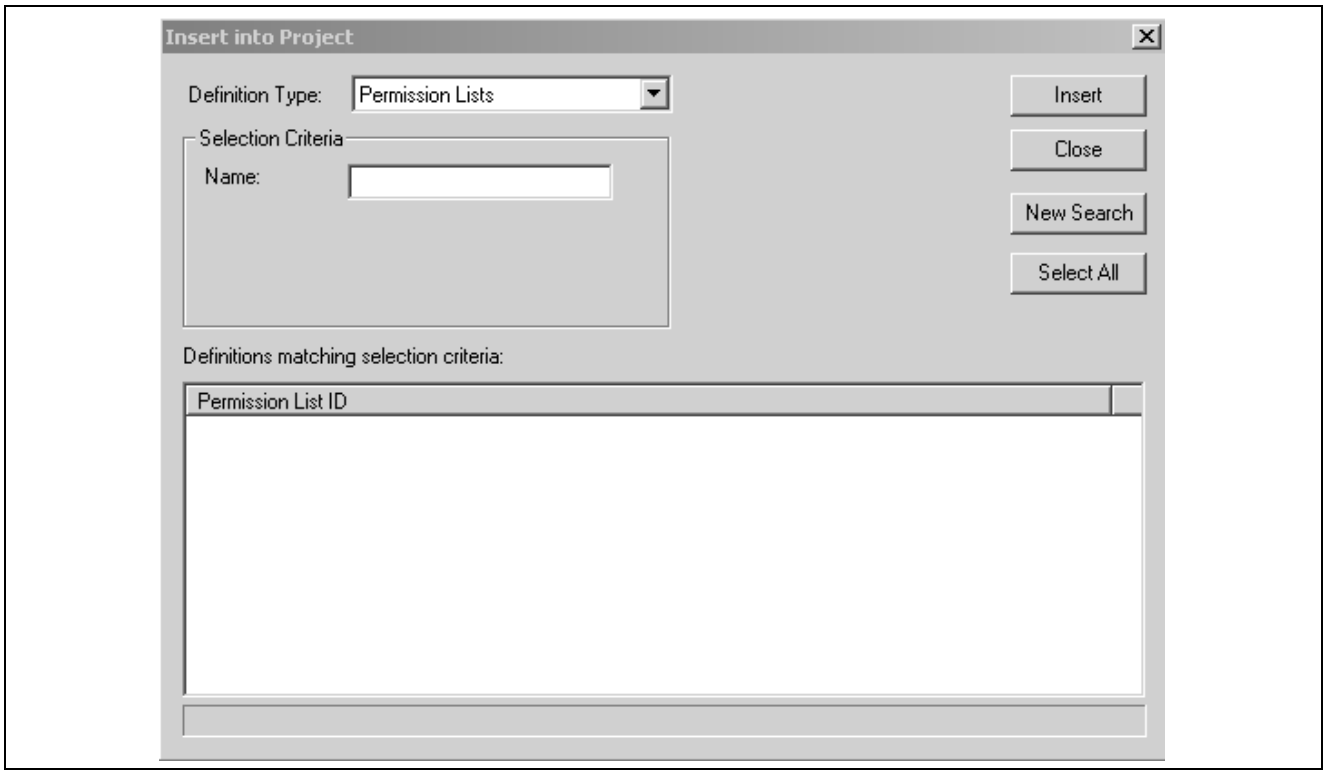

Insert into Project dialog box: Definition Type Permission Lists

4. Click Insert.
5. Click Select All, and then click Insert again.
6. Select the following values, as shown in the example:
   a. In the Definition Type field, select *Portal Registry Definitions.*
   b. In the Name field, enter the PeopleSoft Portal Solutions database's default portal name (EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER).
   c. In the Owner ID field, select *All Owners.*
   d. In the Related Definitions field, select *Portal Registry Structures,* as shown in the following example:

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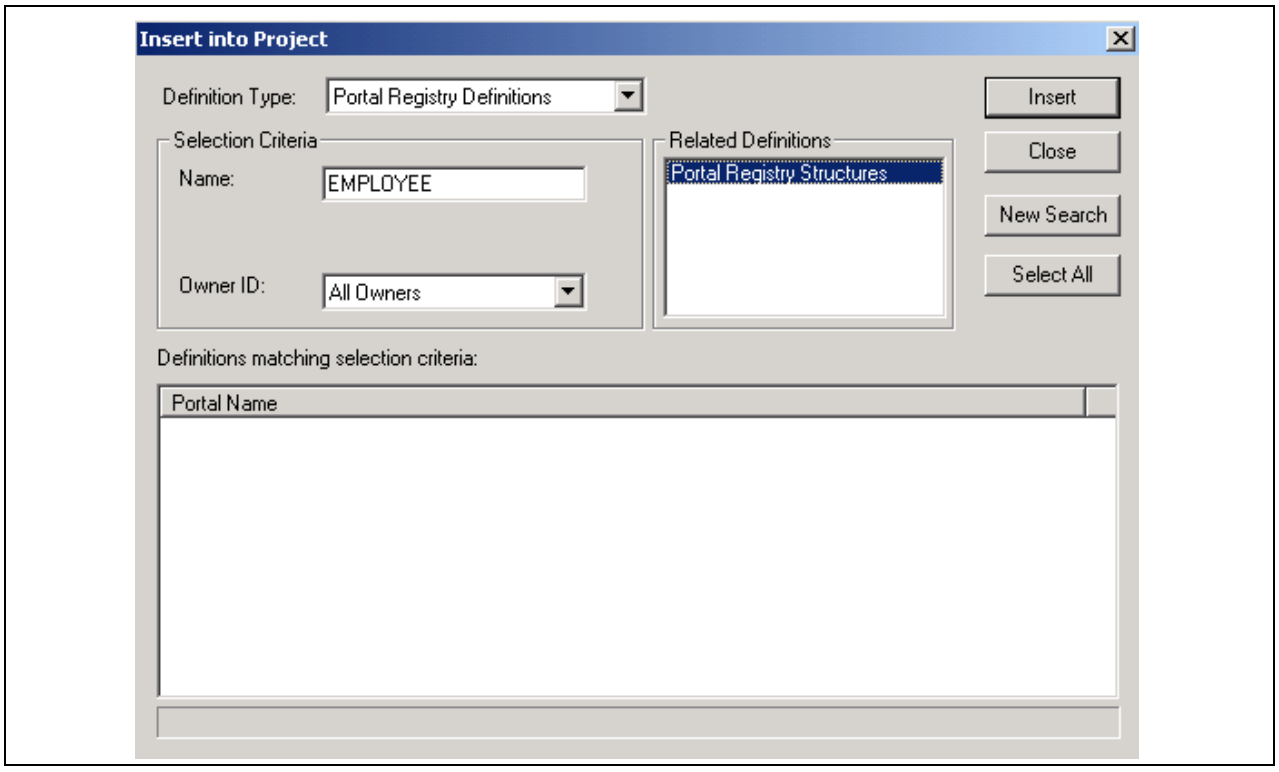

Insert into Project dialog box with Portal Registry Structures selected

7. Click Insert.
8. Click Select All, then click Insert again.
9. Click Close.
10. From PeopleSoft Application Designer, select File, Save Project As….
11. Enter the appropriate new project name.

    Select the project name from the following table, which shows project names for various portal names. This project is referred to as the Portal Project:

Portal Name	Project Name
EMPLOYEE	PORTAL_APP84X_EMPLOYEE
CUSTOMER	PORTAL_APP84X_CUSTOMER
PARTNER	PORTAL_APP84X_PARTNER
SUPPLIER	PORTAL_APP84X_SUPPLIER

12. Click OK.
13. From PeopleSoft Application Designer, select File, Merge Projects...
14. Enter the project name *PORTAL_PA84X_REGISTRY.*

    This merges the objects from the PORTAL_PA84XREGISTERY project into your newly created Portal Project.
15. Select File, Save Project to save the updated Portal Project.
16. Close PeopleSoft Application Designer.

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Task L-4-6: Cleaning the Copy of Production Portal Project

In this step, you clean the Copy of Production Portal project so that it contains only the Content Provider registry data.

Important! Before using the Copy of Production Portal project, you must run the Clean Portal Project on the Copy of Production database. Follow the directions on the Clean Portal Project Page.

To clean the Copy of Production Portal project:

1. In your Copy of Production database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.
2. Add the run control ID, *CLEAN_PORTAL_XXXXXXXX*, where *XXXXXXXX* represents the portal definition name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER, for example.
3. In the Project Name field, enter the Portal Project name that you created in the Creating the Copy of Production Portal Project step (PORTAL_APP84X_[your portal name here]).
4. Enter a value in the Portal Name field; *EMPLOYEE*, for example.
5. Enter a value in the Content Provider Name field; *CRM*, for example.

   Important! Before running the Clean Portal Project, you must enter the Node URI text for the Message Node you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task L-4-7: Deleting the Copy of Production Database Cache

In this step, you delete the Copy of Production database cache.

To delete the Copy of Production database cache:

1. On your Copy of Production database, start Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the Copy of Production database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task L-5: Comparing the Portal Project

This task applies only to the initial upgrade pass.

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In this step, you compare the Portal project that you created in the previous step and then review the compare results. This will enable you to adjust the Portal project as necessary before copying it into the PeopleSoft Portal Solutions database.

To compare the Portal project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Tools, Compare and Report....
3. Enter the Portal project name that you specified in the Creating the Copy of Production Portal Project step (PORTAL_APP84X_[your portal name here]).
4. Enter the database name of your target PeopleSoft Portal Solutions database, and the user ID and password.
5. Click the Options button.
6. In the Compare Type field, select *Project*, and click OK.
7. Select all object types and click OK.
8. Close PeopleSoft Application Designer.

Task L-6: Reviewing the Portal Project

This task applies only to the initial upgrade pass.

Review the Portal project (PORTAL_APP84X_[your portal name here]) on the Copy of Production database, looking for customizations that you have applied to your database. Object definitions that you changed have **Changed* or **Unchanged* in the Target column of the compare report. The asterisk (*) indicates that the change was not made by Oracle. Review each of these objects carefully. If Oracle delivered the object, the Source column of the report will read *Changed*. Note the changes that you made to the object. After you complete the upgrade, when you test the system, you can decide whether you still need the customization. You can reapply the customization at that time.

See Appendix: “Using the Comparison Process.”

Task L-7: Copying the Portal Project

This section discusses:

- Understanding Portal Project Copying
- Copying the Portal Project to the Portal Solutions Database
- Deleting the Portal Solutions Database Cache

Understanding Portal Project Copying

This task applies only to the initial upgrade pass.

In this step, you copy the project from your Copy of Production database to your target PeopleSoft Portal Solutions database.

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Task L-7-1: Copying the Portal Project to the Portal Solutions Database

Follow the steps below to copy the Portal Project to the PeopleSoft Portal Solutions database.

Important! Before exporting the Portal Project from the Content Provider database, you must successfully clean the Copy of Production Portal Project. If you proceed with this step without cleaning the project, you will overwrite critical PeopleSoft Portal Solutions data.

See Creating the Portal Project, Cleaning the Copy of Production Portal Project.

To copy the Portal Project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select File, Open...
3. In the Definition field, select *Project* and click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To Database...
6. Enter the name of your target PeopleSoft Portal Solutions database, and the user ID and password.
7. Click Select All.
8. Click Copy.

   This may take a few minutes.
9. Close PeopleSoft Application Designer.

Note. You do not need to create or alter any records or views.

Task L-7-2: Deleting the Portal Solutions Database Cache

In this step, you delete the PeopleSoft Portal Solutions database cache.

To delete the PeopleSoft Portal Solutions database cache:

1. Delete the target PeopleSoft Portal Solutions database application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

Task L-8: Copying the Portal Project to Production

This section discusses:

- Understanding Portal Project to Production Copying
- Copying the Portal Project to File
- Copying the Portal Project from File
- Deleting the Portal Solutions Database Cache Again

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Understanding Portal Project to Production Copying

You must perform this step during both your test and final Move to Production upgrade passes.

Task L-8-1: Copying the Portal Project to File

Follow the steps below to copy the Portal Project to file.

Note. If your Copy of Production and target PeopleSoft Portal Solutions databases run on the same PeopleSoft PeopleTools release and database platform, you can copy the project directly to the target PeopleSoft Portal Solutions database from within the Copy of Production Application Designer and skip the rest of this step.

To copy the Portal Project to file:

1. Launch PeopleSoft Application Designer and sign in to your Copy Production database.
2. Select File, Open....
3. In the Definition field, select *Project* and then click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To File....
6. Click the Browse button for the Export Directory.
7. Select a temporary directory and then click OK.
8. Click Select All.
9. Click Copy.

   This may take a few minutes.
10. Close PeopleSoft Application Designer.

Task L-8-2: Copying the Portal Project from File

In this step, you copy the Portal Project from file.

To copy the Portal Project from file:

1. Launch PeopleSoft Application Designer and sign in to your target PeopleSoft Portal Solutions database.
2. Select Tools, Copy Project, From File....
3. Browse to the Copy of Production database server's temporary directory.

   If you cannot access the Copy of Production database server's temporary directory, then copy the Portal Project folder and files from the temporary directory to the target PeopleSoft Portal Solutions database server's *PS_APP_HOME*\PROJECTS directory, and browse to that directory.
4. Select the Portal Project name that you just copied to file in the previous step.
5. Click Open.
6. Click Select All.
7. Set the project language options as follows:
   a. Click Options.
   b. In the Copy Options tab, select *English*, and *COMMON*.

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c. If your PeopleSoft Portal Solutions database is a multi-language database, then also select the languages that you have installed on your PeopleSoft Portal Solutions database.

d. Click OK.

8. Click Copy.
9. Select the Upgrade tab and view the Output window.

   All objects should have copied successfully.

10. Close PeopleSoft Application Designer.

Note. After the copy, you do not need to create or alter any records or views on the target PeopleSoft Portal Solutions database.

Task L-8-3: Deleting the Portal Solutions Database Cache Again

In this step, you delete the PeopleSoft Portal Solutions database cache.

To delete the PeopleSoft Portal Solutions database cache:

1. Delete the target PeopleSoft Portal Solutions database's application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

Task L-9: Deleting Obsolete Folders

This section discusses:

- Understanding Obsolete Folder Deletion
- Deleting Obsolete Folders on Portal Solutions 8.4
- Deleting Obsolete Folders on Portal Solutions 8.8

Understanding Obsolete Folder Deletion

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

In this step, you delete folders on your target PeopleSoft Portal Solutions database that the Portal Registry Structures no longer reference. The process that you run depends on your version of PeopleSoft Portal Solutions.

Task L-9-1: Deleting Obsolete Folders on Portal Solutions 8.4

Follow this procedure to delete obsolete folders on PeopleSoft Portal Solutions 8.4.

To delete obsolete folders on PeopleSoft Portal Solutions 8.4:

1. Using PeopleSoft Data Mover, sign in to your target PeopleSoft Portal Solutions database.
2. Run the following PeopleSoft Data Mover script, located in the PeopleSoft Portal Solutions PS_APP_HOME\SCRIPTS directory:

   ```
   PORTAL_REG_FOLDER_DEL.DMS
   ```

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3. Close PeopleSoft Data Mover.

Task L-9-2: Deleting Obsolete Folders on Portal Solutions 8.8

Follow this procedure to delete obsolete folders on PeopleSoft Portal Solutions 8.8 or higher.

To delete obsolete folders on PeopleSoft Portal Solutions 8.8 or higher:

1. On your target PeopleSoft Portal Solutions database, navigate accordingly:
   a. For PeopleSoft Portal Solutions 8.8: Portal Administration, Navigation, Run Folder Cleanup.
   b. For PeopleSoft Portal Solutions 8.9 or higher: Portal Administration, Navigation, Delete Empty Folders.
2. Add a run control as follows:
   a. Enter a value for the run control ID. The run control ID is *FOLDER_CLEAN_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
   b. Click Add.
3. Enter a value in the Portal Name field.

   This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task L-10: Updating Registry Folder Permissions

This section discusses:

- Understanding Registry Folder Permissions Updates
- Updating Portal Solutions Registry Folder Permissions
- Deleting the Portal Solutions Cache

Understanding Registry Folder Permissions Updates

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, you must update the folder permissions to reflect the changes. After you update the folder permissions, you must delete the target PeopleSoft Portal Solutions database cache files to propagate the changes.

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Task L-10-1: Updating Portal Solutions Registry Folder Permissions

Follow this procedure to update your PeopleSoft Portal Solutions registry folder permissions.

Note. This process will take between a few minutes to a few hours, depending on the volume of portal data. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

To update the PeopleSoft Portal Solutions folder permissions:

1. On your target PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Security Sync.
2. Add a run control as follows:
   a. Enter a value for the run control ID.

      The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).

   b. Click Add.
3. Enter a value in the Portal Name field.

   This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task L-10-2: Deleting the Portal Solutions Cache

In this step delete the PeopleSoft Portal Solutions cache.

To delete the PeopleSoft Portal Solutions cache:

1. Delete the target PeopleSoft Portal Solutions database application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

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APPENDIX M

Upgrading with Tax Updates

Upgrading with Tax Updates

Your HRMS Demo database was delivered with a predetermined level of Tax Updates applied. This Tax Update level is listed in the task, “Understanding Your Upgrade.” Oracle recommends that you run your upgrade using your Copy of Production at the same Tax Update level as the HRMS Demo database. Your Copy of Production database may be in one of three states relative to the Demo database.

- You will need to update the delivered HRMS Demo database with all tax updates through the latest tax update on your Copy of Production before you start your initial upgrade pass. This is required so you will not lose any of the more current Tax Updates. Do not apply any more updates to your production system until your upgrade is complete and you go live on the new PeopleSoft release. If you apply additional updates to your production system while running the upgrade passes, you will loose those updates during your Move to Production pass. You will then need to reapply the tax updates that were applied to your production since your Initial upgrade pass.
- The Copy of Production database may be current with the Tax Update from the Demo database applied (but not beyond). You do not need to apply any tax updates.
- The Copy of Production database may not be current with the Tax Update from the Demo database. Oracle strongly recommends that you apply all of the Tax Updates to bring your Copy of Production database to the same Tax Update level as your HRMS Demo database. This will assure that your tax information will be correct when you have completed your upgrade. If this is not possible, be aware of the following potential issues and act accordingly:

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- To get your Tax Tables up to date, you will need to compare data in the Tax Tables from your Copy of Production to the HRMS Demo database. Any needed updates from the Demo Database should be applied to the Copy of Production database manually. The tables involved are as follows:

```
PS_CAN_TAX_TBL
PS_CAN_TAX_CITLUMP
PS_CAN_TAX_QITLUMP
PS_CAN_TAX_CITRATE
PS_CAN_TAX_QITRATE
PS_CAN_TAX_PROV
PS_CAN_TAX_PROVNCT
PS_CAN_TAX_PROVTHR

PS_GARN_RULE_TBL
PS_GARN_EXEMPT_TBL
PS_GARN_OPERANDS
PS_GARN_DE_DEFN
PS_GARN_DE_DED
PS_GARN_PRORATE_RL

PS_STATE_TAX_TBL
PS_STATE_TAXRT_TBL
PS_ST_OTH_TAX_TBL
PS_STTAX_RECIP_TBL
PS_LOCTX_RECIP_TBL
PS_TAXGR_DEFN_TBL
PS_TAXGR_BASE_TBL
PS_TAXGR_CMPNT_TBL
PS_LOCAL_TAX_TBL
PS_LOCAL_TAX_TBL2
PS_SWT_MARSTAT_TBL
PS_LCLWK_TXRCP_TBL
```

Note. Garnishments Rules tables GARN_RULE_TBL, GARN_EXEMPT_TBL, and GARN_OPERANDS have a different structure in this release and will be part of data conversion. We will deliver all garnishments rules maintained by us during the upgrade, so there is no need to manually update these tables to bring them to the Tax Update level of the Demo database.

See Appendix: “Understanding Garnishments Changes.”

- You should also review the Tax Update documentation to guide you on specific Tax Updates. This documentation is available on My Oracle Support.

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APPENDIX N

Using Data Conversion Utilities

This appendix discusses:

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

Understanding Data Conversion Utilities

The Upgrade Data Conversion Application Engine Programs are organized into a series of Drivers or Groups that guide the flow and order of execution at runtime for a particular upgrade path. This appendix contains information regarding the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table.

This appendix also contains information regarding the EO Upgrade Framework. The EOUF process consists of two Application Engine programs and is intended to optimize the data conversion process by analyzing Source and Target tables, column usage, state records, and bind variables to determine actual dependencies between Application Engine sections. This allows you to run your data conversion process during your PeopleSoft application upgrade with optimal performance.

Task N-1: Using the UPGDATACONV Process

This section discusses:

- Understanding the UPGDATACONV Process
- Reviewing the Data Conversion Report

Understanding the UPGDATACONV Process

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

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

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

To run UDATACNV:

1. Using SQRW, run SQR UDATACNV on your Copy of Production database.
2. When prompted for upgrade path, enter:
3. When prompted for group number, enter the two-digit group number to report on, or enter *0* to see the comments for all groups.

Task N-2: Using the EO Upgrade Framework Process

This section discusses:

- Understanding the EO Upgrade Framework Process
- Reviewing EO Upgrade Framework Initial Analysis
- Reviewing Dependency Analysis
- Reviewing Runtime for EOUFDATACONV
- Reviewing EO Upgrade Framework Reporting

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

With the PeopleSoft 9.1 application release, EOUF was introduced as the new Upgrade Data Conversion Framework. This new framework allows the Application Engine (AE) data conversion to run out of the box on a number of threads instead of the previous single threaded approach.

The EOUF process uses many pieces of the previous style data conversion delivered in PeopleSoft 9.0 applications and lower. For example, the EOUF process uses the AE section grouping and sequencing in the PS_UPG_DATACONV table for its dependency modeling. With the introduction of EOUF, we have also introduced new terminology – *root or top section.* A *root or top section* is an AE section defined in PS_UPG_DATACONV. We use *root or top section* to distinguish between sections being called from the data conversion program as opposed to sections being called from an AE call section step.

The EOUF process includes analyzing the insert, update, and delete SQL steps in your data conversion to determine the Source and Target tables, column usage, stat records, and bind variables that are used. This includes analyzing dynamic SQL, App Classes, SQLExec's, and platform-specific code.

The AE program gathers a list of AE sections required for data conversion from a given upgrade path. These sections are analyzed and SQL statements are extracted and stored in the AE Analyzer repository. Each SQL statement is analyzed to derive a list of tables that are manipulated or queried during the execution of that SQL. Once all the SQL is analyzed, the information is used to derive section dependency information, which is then saved in the AE Analyzer repository.

There are two types of analysis for EOUF: initial and dependency. This section will describe both analysis types in detail.

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Task N-2-2: Reviewing EO Upgrade Framework Initial Analysis

This section discusses:

- Understanding Initial Analysis
- Reviewing Data Conversion Query Parsing
- Reviewing Custom Data Conversion Code
- Reviewing Table Usage Information
- Reviewing Invalid SQL
- Reviewing the Data Conversion Repositories

Understanding Initial Analysis

The first part of the new EOUF process is the EOUFANALYSIS Application Engine, also known as the AE Analyzer. EOUFANALYSIS accepts one parameter for the upgrade path, and then queries PS_UPG_DATACONV to retrieve all the groups and sections for that upgrade path, ordering by group and sequence. Starting with the first group and first sequence, EOUFANALYSIS parses each AE section definition following the flow from step to step and through any nested call sections. As it follows the flow, it inserts rows into the PS_EOUF_ANALYSIS table for each AE Section, Step, and Action it comes across. EOUFANALYSIS maintains a counter as it goes and increments the counter as it writes each Action to the PS_EOUF_ANALYSIS table. By the end of this first task, the PS_EOUF_ANALYSIS table will describe the entire upgrade from top to bottom, from the first AE section in the first Upgrade Group to the last section in the last Upgrade Group. By querying the PS_EOUF_ANALYSIS table and ordering by EOUF_AESTMTSEQ, the whole will be described, including any nested call sections.

It is important to note that the PS_EOUF_ANALYSIS table contains every actual Step in the chosen upgrade path. During the data conversion runtime phase, it is likely that not all these steps will be executed because specific data composition and various application options will prevent some sections or steps from running. With the new EOUF process, data composition can affect the data conversion runtime flow, which makes it impossible to predetermine the exact runtime flow the conversion will follow.

The EOUFANALYSIS AE reads the data conversion code for your defined upgrade path (where the path is defined in the UPGDATACONV table with UPG_CONV_TYPE= “MAIN”).

The AE Analyzer program leverages two PeopleCode functions included with PeopleSoft PeopleTools 8.50 or higher. The two PeopleCode functions are:

- GetProgText: A function that retrieves a PeopleCode program as text.
- ResolveMetaSQL: A function that returns a string of SQL text that has had its metasql resolved.

Reviewing Data Conversion Query Parsing

After EOUFANALYSIS determines the upgrade path flow, it traverses the flow again looking at all the different Step Actions to determine which SQL is being executed by that Step. Most action types are straightforward; SQL, Do Select. PeopleCode is the most complicated action type. A Java program parses the PeopleCode and pulls all the SQL executed in the PeopleCode. The results of the action type analysis end up in a table called PS_EOUF_DTLIDSQLS, which stores a reference to PS_EOUF_ANALYSIS, along with the SQL statements associated with each Step Action. In the case of PeopleCode, there may be many rows in the PS_EOUF_DTLIDSQLS table for each PeopleCode reference in PS_EOUF_ANALYSIS. In addition, a second shadow table, called PS_EOUF_DTLIDSQLSR, is also populated during action type analysis. The only difference between PS_EOUF_DTLIDSQLS and PS_EOUF_DTLIDSQLSR is that PS_EOUF_DTLIDSQLSR contains the fully resolved SQL statements. For example, if the original SQL in a Step was:

```
UPDATE PS_BEN_DEFN_COST SET RATE_TBL_ID =
```

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```
%Substring(%Sql(UPG_HC_221,RATE_TBL_ID),1,4) %Concat '-2'
WHERE RATE_TYPE='2' AND RATE_TBL_ID IN ( SELECT RATE_TBL_ID FROM
PS_UPG_BN_RATES WHERE RATE_TYPE='2')
```

Then this would be resolved to platform-specific SQL. In the case of SQLServer it would be:

```
UPDATE PS_BEN_DEFN_COST SET RATE_TBL_ID =
SUBSTRING(RTRIM(RATE_TBL_ID),1,4) + '-2' WHERE RATE_TYPE='2' AND
RATE_TBL_ID IN ( SELECT RATE_TBL_ID FROM PS_UPG_BN_RATES
WHERE RATE_TYPE='2')
```

Each of these SQL statements is further parsed to determine the tables that participate in the query. The results are stored in the PS_EOUF_DTLIDTBLS table. A query can have zero or one target tables. If the query is an INSERT, UPDATE, DELETE, etc, then there will be one target. If the query is a select statement, then there will be no target table. For the previously stated query, you would expect to see 2 rows in the PS_EOUF_DTLIDTBLS table. The first row would be for the PS_BEN_DEFN_COST table with an EOUF_TABLEUSAGE value of *T* because it is the target table of the query. The second row would be for the PS_UPG_BN_RATES table with an EOUF_TABLEUSAGE value of *S* because it is a source table in the query.

At this point we have gathered all the information we need about the specific upgrade path to build a dependency model. The dependency model is solely based on which tables are affected by which steps and follows some very simple rules. Most of these rules are inherent in the Upgrade Group model of the old PS_UPG_DATACONV process.

Reviewing Custom Data Conversion Code

You can include custom data conversion code in the Initial Analysis and subsequent steps in the EOUF process by adding a row (or rows) to the PS_UPG_DATACONV table for each custom AE section that is to be executed, where a row is defined as UPG_PATH, UPG_GROUP_SEQ_NUM, SEQ_NUM, AE_APPLID, AE_SECTION, ACTIVE_FLAG, UPG_CONV_TYPE.

Reviewing Table Usage Information

The data conversion analysis process attempts not only to identify the tables that are used in a given Application Engine step, but also how the tables are being used in the context of each step.

This information is stored in the analysis tables and documented in the Table Usage and Action columns of delivered EOUF reports, such as EOUF0001.SQR.

Valid values for the Table Usage column are:

- *S* for Data Source
- *T* for Data Target
- *X* for Unknown

Note. An *X* value in the Table Usage column for the PS_EOUF_DUAL, PS_EOUF_COMMON_AET, PS_EOUF_DUMMY, or PS_EOUF_NORECNAME tables is expected and does not impact the subsequent Dependency Analysis Process.

See Reviewing Dependency Analysis.

Valid values for the Action column are:

- CREATE
- DELETE

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- DROP
- INSERT
- SELECT
- TRUNCATE
- UPDATE
- UPDSTATS
- UNKNOWN
- OTHER

A valid value for the action “Unknown” is only applicable to PeopleCode steps and only occurs in instances when the parser encounters syntax such as `getrecord, getrowset, createrecord,` or `createrowset,` and cannot determine which actions were being done against the variable.

A valid value for the action “Other” occurs in instances when the parser encounters syntax such as the “Invalid SQL Override” or other non-SQL statements such as application function calls.

See Reviewing Invalid SQL

Reviewing Invalid SQL

The data conversion analysis process may mark certain SQL statements as invalid. This designation refers to SQL statements that the AE Analysis process could not correctly process. When a SQL statement is marked invalid, there are three options that you can use:

- Modify the SQL so that the AE Analyzer can process the statement. The following table compares sample invalid and valid SQL statements:

Invalid SQL	Valid SQL
UPDATE %Table(%BIND(RECNAME)) SET RELATIONSHIP = ’C’ WHERE RELATIONSHIP IN (’S’, ’D’)	• UPDATE %TABLE(BN_834_MEMBER) SET RELATIONSHIP = ’C’ WHERE RELATIONSHIP IN (’S’, ’D’) • UPDATE %TABLE(DEP_BEN_EFF) SET RELATIONSHIP = ’C’ WHERE RELATIONSHIP IN (’S’, ’D’) • UPDATE %Table(EMERGENCY_CNTCT) SET RELATIONSHIP = ’C’ WHERE RELATIONSHIP IN (’S’, ’D’)

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

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

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

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

Correct = PS_JOB

Incorrect = JOB

The following table gives sample override lines for various situations:

Syntax	Sample Override Lines
When Source and Target tables are explicitly known and static	For example: • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:<SRC Table>,<SRC Table>; • REM SQLANALYSIS:T::S:<SRC Table>,<SRC Table>; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:;

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Syntax	Sample Override Lines
When Source and/or Target Tables are determined based on a query	For example: • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:[table name]; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T::S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:; Where: *SQLid*: Specify the name of an existing SQL definition. *paramlist*: Specify a list of arguments for dynamic substitutions at runtime. The first argument replaces all occurrences of %P(1) in the referenced SQL definition, the second argument replaces %P(2), and so forth. **Note.** The paramlist arguments must be static values. Variable values in the parmlist are not permitted. **Note.** The Query is resolved at the time the Data Conversion Analysis is executed. It is NOT resolved during the Data Conversion Runtime. **Note.** The Query must return one or more valid RECNAME values. No other return results are permitted.
Where there is no Source or Target table to be defined an/or the invalid SQL is to be excluded from the table and dependency analysis.	REM SQLANALYSIS:T::S:PS_EOUF_NORECNAME; **Note.** The "REM SQLANALYSIS:T::S:;" syntax is not a valid override and will be marked as "Invalid" by the EOUFANALYSIS Program.

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

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

Reviewing the Data Conversion Repositories

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

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

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Analysis information is stored in the following tables:

- PS_UPG_DATACONV
- PS_EOUF_ANALYSIS
- PS_EOUF_DATACONV
- PS_EOUF_DTLIDSQLS
- PS_EOUF_DTLIDSQLSR
- PS_EOUF_DTLIDTBLS
- PS_EOUF_RUNDEPEND
- PS_EOUF_SECDEPEND
- PS_EOUF_SECLISTTMP
- PS_EOUF_STEPDEPEND

The following Analysis tables make up the EO Upgrade Framework:

- PS_EOUF_DATACONV

  The PS_EOUF_DATACONV table is based on the table definition for PS_UPG_DATACONV. It stores the upgrade AE sections for the chosen upgrade path.

COLUMN	DESCRIPTION
UPG_PATH	Upgrade Path Copied from PS_UPG_DATACONV
UPG_GROUP_SEQ_NUM	Upgrade Group Copied from PS_UPG_DATACONV
SEQ_NUM	Upgrade Sequence Copied from PS_UPG_DATACONV
AE_APPLID	Upgrade Application Engine Copied from PS_UPG_DATACONV
AE_SECTION	Upgrade Application Engine Section Copied from PS_UPG_DATACONV
ACTIVE_FLAG	Active Flag Copied from PS_UPG_DATACONV
EOUF_RUNDURATION	Elapsed time for this section to run during data conversion
RUN_STATUS_FLAG	Run Status Flag (Y-complete, N-not run yet, R-Running, F-Failed)
EOUF_GUID	GUID generated by the Data Conversion runtime engine

- PS_EOUF_ANALYSIS

  This is the main analysis table. The AE Analyzer (EOUFANALYSIS) writes a row to this table for every Action in each Root Section of the specified upgrade path.

COLUMN	DESCRIPTION
UPG_PATH	Upgrade Path Copied from PS_UPG_DATACONV
UPG_GROUP_SEQ_NUM	Upgrade Group Copied from PS_UPG_DATACONV
SEQ_NUM	Upgrade Sequence Copied from PS_UPG_DATACONV
EOUF_TOPAEAPPLID	Upgrade Application Engine Copied from PS_UPG_DATACONV

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COLUMN	DESCRIPTION
EOUF_TOPAESECTN	Upgrade Application Engine Section Copied from PS_UPG_DATACONV
EOUF_TOPAESTEP	Upgrade Section Step
EOUF_TOPAESEQNUM	Upgrade Section Sequence Number
EOUF_AELEVEL	Nesting level for Call Section
AE_APPLID	Actual AE Program (same as EOUF_TOPAEAPPLID if EOUF_AELEVEL is 1)
AE_SECTION	Actual Section (same as EOUF_TOPAESECTN if EOUF_AELEVEL is 1)
AE_STEP	Actual Step (same as EOUF_TOPAESTEP if EOUF_AELEVEL is 1)
AE_SEQ_NUM	Actual Seq Num (same as EOUF_TOPAESEQNUM if EOUF_AELEVEL is 1)
MARKET	Market
DBTYPE	DBType
AE_DO_SECTION	If Step Action is Call Section, then this is the section to be called
AE_DO_APPL_ID	If Step Action is Call Section, then this is the program to be called
AE_DYNAMIC_DO	Indicates the Call Section is a dynamic call section
STEP_DESCR	Step Description
AE_STMT_TYPE	Action Type e.g. S-SQL, P-PeopleCode, D-DoSelect, H-DoWhen etc
EOUF_STMTTYPENUM	Numeric identified for AE_STMT_TYPE (used for ordering step actions)
EOUF_AESTMTSEQ	Sequence used to order the steps actions for the whole upgrade
AE_REUSE_STMT	Standard AE Reuse Statement flag
AE_DO_SELECT_TYPE	Standard AE Do Select Type
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_INFO1	Extra Information mostly related to FUNCLIB calls
EOUF_INFO2	Extra Information mostly related to FUNCLIB calls
EOUF_INFO3	Extra Information mostly related to FUNCLIB calls
EOUF_INFO4	Extra Information mostly related to FUNCLIB calls
EOUF_INFO5	Extra Information mostly related to FUNCLIB calls
SQLID	For SQL step, the SQLID of the SQL this step action executes
EOUF_CHUNKSEQ	Statement Chunk Sequence
EOUF_STMTDESCR	Description copied from AE Step Description
EOUF_HASPARENTS	This Step has dependencies on other one or more other Steps
EOUF_HASCHILDREN	One or more other Steps have a dependency on this step

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COLUMN	DESCRIPTION
EOUF_HASWHERE	The SQL has a where clause – Mostly used by PeopleSoft Development
EOUF_TEXTCHUNK	Statement executed by this Step.

- PS_EOUF_DTLIDSQLS

  This table holds a reference to every SQL in the conversion code for the specified upgrade path.

COLUMN	DESCRIPTION
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_SQLNUM	SQL Number, for peoplecode there may be many SQL statements
EOUF_AESTMTLEN	Length of the text of the SQL statement
EOUF_OBJ_TYPE	S-SQL or P-PeopleCode
EOUF_CHUNKSEQ	Statement Chunk Sequence
TABLE_NAME	Main Table in the SQL Statement, Blank if SQL is SELECT with many tables
EOUF_DMLACTION	INSERT, UPDATE, DELETE, SELECT etc
EOUF_LINENUM	Refers to the PeopleCode line number where the SQL is defined
EOUF_VALIDSQL	Internal Identifier to indicate a piece of SQL than can or cannot be parsed
DESCR254	Description Column
EOUF_PARAMCLAUSE	Bind variable used in the SQL
EOUF_INFO1	Extra Information mostly related to FUNCLIB calls
EOUF_INFO2	Extra Information mostly related to FUNCLIB calls
EOUF_INFO3	Extra Information mostly related to FUNCLIB calls
EOUF_INFO4	Extra Information mostly related to FUNCLIB calls
EOUF_INFO5	Extra Information mostly related to FUNCLIB calls
EOUF_TEXTCHUNK	Statement executed by this Step

- PS_EOUF_DTLIDSQLSR

  This table differs slightly from the PS_EOUF_DTLIDSQLS table in that the SQL statement has been fully resolved into platform-specific SQL. This makes it much easier to see what is happening in the SQL

COLUMN	DESCRIPTION
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_SQLNUM	SQL Number, for PeopleCode there may be many SQL statements
EOUF_CHUNKSEQ	Statement Chunk Sequence
EOUF_TEXTCHUNK	Statement executed by this Step

- PS_EOUF_DTLIDTBLS

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This table holds a reference to every SQL in the conversion code for the specified upgrade path and which Tables or Records are in use for each piece of SQL.

COLUMN	DESCRIPTION
DETAIL_ID	Section.Step.Action identifier used as a key to most EOUF tables
EOUF_SQLNUM	SQL Number, for peoplecode there may be many SQL statements
RECNAME	Record Name
TABLE_NAME	Associated Table Name
EOUF_TABLEUSAGE	T-Target, S-Source
EOUF_TABLETYPE	R-Record, S-State Record, U-Upgrade Table, V-View, T-TempTable
EOUF_INFO1	Extra Information mostly related to FUNCLIB calls
EOUF_INFO2	Extra Information mostly related to FUNCLIB calls
EOUF_INFO3	Extra Information mostly related to FUNCLIB calls
EOUF_INFO4	Extra Information mostly related to FUNCLIB calls
EOUF_INFO5	Extra Information mostly related to FUNCLIB calls

- PS_EOUF_STEPDEPEND

  By querying PS_EOUF_DTLIDTBLS and PS_EOUF_ANALYSIS, it is possible to determine which steps have dependencies and what those dependencies are.

COLUMN	DESCRIPTION
EOUF_P_GRPSEQNUM	Parent Data Conversion Group Number
EOUF_P_SEQNUM	Parent AE Section Sequence Number
EOUF_P_TOPAEAPPLID	Parent Data Conversion AE Program
EOUF_P_TOPAESECTN	Parent Data Conversion AE Section
EOUF_P_TOPAESTEP	Parent Data Conversion AE Step
EOUF_P_TOPAESEQNUM	Parent Data Conversion AE Step Sequence
EOUF_P_AEAPPLID	Parent AE Program
EOUF_P_AESECTION	Parent AE Section
EOUF_P_AESTEP	Parent AE Step
EOUF_P_AESEQNUM	Parent AE Step Sequence within the Section
EOUF_P_AESTMTSEQ	Parent AE Step Sequence across whole upgrade
EOUF_P_DETAILID	Parent AE Step Detail ID
EOUF_P_SQLNUM	Parent AE Detail ID SQL Sequence
EOUF_C_GRPSEQNUM	Child Data Conversion Group Number
EOUF_C_SEQNUM	Child AE Section Sequence Number
EOUF_C_TOPAEAPPLID	Child Data Conversion AE Program
EOUF_C_TOPAESECTN	Child Data Conversion AE Section
EOUF_C_TOPAESTEP	Child Data Conversion AE Step

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COLUMN	DESCRIPTION
EOUF_C_TOPAESEQNUM	Child Data Conversion AE Step Sequence
EOUF_C_AEAPPLID	Child AE Program
EOUF_C_AESECTION	Child AE Section
EOUF_C_AESTEP	Child AE Step
EOUF_C_AESEQNUM	Child AE Step Sequence within the Section
EOUF_C_AESTMTSEQ	Child AE Step Sequence across whole upgrade
EOUF_C_DETAILID	Child AE Step Detail ID
EOUF_C_SQLNUM	Child AE Detail ID SQL Sequence
EOUF_TABLENAME	Common table referenced by the parent and child step
EOUF_P_TABLEUSAGE	Parent table usage T-Target, S-Source
EOUF_C_TABLEUSAGE	Child table usage T-Target, S-Source

- PS_EOUF_ SECDEPEND

  This table is an aggregation of PS_EOUF_STEPDEPEND to the Section level.

COLUMN	DESCRIPTION
EOUF_P_GRPSEQNUM	Parent Data Conversion Group Number
EOUF_P_TOPSEQNUM	Parent AE Section Sequence Number
EOUF_P_TOPAEAPPLID	Parent Data Conversion AE Program
EOUF_P_TOPAESECTN	Parent Data Conversion AE Section
EOUF_P_AESTMTSEQ	Parent AE Step Sequence across whole upgrade
EOUF_C_GRPSEQNUM	Child Data Conversion Group Number
EOUF_C_TOPSEQNUM	Child AE Section Sequence Number
EOUF_C_TOPAEAPPLID	Child Data Conversion AE Program
EOUF_C_TOPAESECTN	Child Data Conversion AE Section
EOUF_C_AESTMTSEQ	Child AE Step Sequence across whole upgrade
EOUF_DEPENDSOURCE	Dependency Rule
EOUF_DEPENDRULE	DEPENDENT or INDEPENDENT

- PS_EOUF_RUNDEPEND

  This table represents the section dependency model. You can query this table for any given data conversion AE Section to determine what it depends on and what depends on it. The runtime data conversion Application Engine (EOUFDATACONV) uses this table to determine which sections are eligible to run.

COLUMN	DESCRIPTION
EOUF_P_GRPSEQNUM	Parent Data Conversion Group Number
EOUF_P_TOPSEQNUM	Parent AE Section Sequence Number
EOUF_P_TOPAEAPPLID	Parent Data Conversion AE Program
EOUF_P_TOPAESECTN	Parent Data Conversion AE Section
EOUF_C_GRPSEQNUM	Child Data Conversion Group Number
EOUF_C_TOPSEQNUM	Child AE Section Sequence Number
EOUF_C_TOPAEAPPLID	Child Data Conversion AE Program

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COLUMN	DESCRIPTION
EOUF_C_TOPAESECTN	Child Data Conversion AE Section
EOUF_DEPTH	Dependency Nesting

Task N-2-3: Reviewing Dependency Analysis

This section discusses:

- Understanding Dependency Analysis
- Reviewing Data Conversion Runtime Rules
- Reviewing Dependency Modeling

Understanding Dependency Analysis

The table usage information identified in the Initial Analysis is subsequently used to determine the dependencies between AE Steps. The Step Dependency Information is then aggregated to the "Root Section" level where a Root Section is defined as a row in the PS_UPG_DATACONV table (UPG_PATH, UPG_GROUP_SEQ_NUM, SEQ_NUM, AE_APPLID, AE_SECTION, ACTIVE_FLAG, UPG_CONV_TYPE).

Reviewing Data Conversion Runtime Rules

The runtime rules of the old UPG_DATACONV Application Engine process are rolled forward into the new EOUF Framework.

The following rules were the previous data conversion runtime rules:

- All Upgrade Groups are dependent on Upgrade Group 1 having been successfully completed.
- Application Engine Sections within an Upgrade Group run sequentially according to Sequence Number.
- After the successful completion of Upgrade Group 1, all other Upgrade Groups could run in parallel depending on the customer setup.
- A failure of a Section with an Upgrade Group prevents subsequent Sections from running until the failure is fixed.

The following rules are the new data conversion runtime rules:

- Dependencies are derived from tables referenced in SQL or PeopleCode actions in Upgrade Sections.
- Dependencies follow the Upgrade Group sequencing. If Section ABC in Upgrade Group 1 updates a given table, then any Section assigned a higher sequence than ABC that updates or queries that same table cannot run until Section ABC is complete.
- Upgrade Groups 2 and higher have no dependency on each other. If Section QWE in Upgrade Group 2 updates table FFF and Section ASD in Upgrade Group 3 also updates table FFF, there is no dependency created.
- Upgrade Groups 2 and higher create dependencies on Sections in their own Upgrade Group and in Upgrade Group 1. If Section ABC in Upgrade Group 1 updates table FFF and Section QWE in Upgrade Group 2 also updates table FFF, then Section QWE becomes dependent on Section ABC.
- Tables as sources do not create dependencies. If Section ZXC in Upgrade Group 1 selects from table FFF, and then Section BNM in Upgrade Group 1 also selects from table FFF, no dependency is created.
- If a Section has a SQL statement that EOUFANALYSIS cannot understand, the SQL is flagged as invalid from the parser point of view (the Data Conversion will still run fine) and a hard dependency is created. This means for every Section with a query that cannot be parsed, it becomes dependent on every Section

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sequentially above it in its Upgrade Group, and on every Section in Upgrade Group 1. Furthermore, every Section sequentially afterward becomes dependent on it.

- Usage of the PS_EOUF_DUAL, PS_EOUF_COMMON_AET, PS_EOUF_DUMMY, or PS_EOUF_NORECNAME tables never results in a dependency.

Reviewing Dependency Modeling

The following table shows how the dependency modeling works. From PS_UPG_DATACONV, we take a section to be run during HC 8.9 to 9.1 data conversion.

UPG_PATH	UPG_GROUP_ SEQ_NUM	SEQ_NUM	AE_APPLID	AE_SECTION
HC89	3	230	UPG_BN89	HCBNS06

This section is executed in Upgrade Group 3 and has a SEQ_NUM of 230. There are three steps in the section. Each step manipulates the PS_LIFE_ADD_TBL table.

DETAIL_ID	SQL_STMT
HCBNS06.Step010.S	UPDATE PS_LIFE_ADD_TBL SET ENROLLE_TYPE=’2’ WHERE PLAN_TYPE IN (’24’,’25’)
HCBNS06.Step020.S	UPDATE PS_LIFE_ADD_TBL SET SUM_DEP_COVG=’Y’, COVERAGE_TYPE=’2’ WHERE LIFE_ADD_COVRG=’5
HCBNS06.Step030.S	UPDATE PS_LIFE_ADD_TBL SET COVERAGE_TYPE=’2’ WHERE LIFE_ADD_COVRG=’3’

The EOUFANALYSIS process will take this information and look for any sections in Upgrade Group 3 with a SEQ_NUM less than 230 or any section in Upgrade Group 1 that manipulates PS_LIFE_ADD_TBL. In this case there are no sections before this one that manipulate PS_LIFE_ADD_TBL. Next, look for sections in Upgrade Group 3 with a SEQ_NUM greater than 230 to see if any sections manipulate PS_LIFE_ADD_TBL. In this case there are a number of queries that reference this table.

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DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBNS10.Step010.D	HCBNS10	%Select(UPG_BN_AET.FACTOR_XSALARY , UPG_BN_AET.FLAT_AMOUNT , UPG_BN_AET.CALC_ RULES_ID) SELECT DISTINCT L.FACTOR_XSALARY , L.FLAT_AMOUNT , C.CALC_RULES_ID FROM PS_LIFE_ADD_TBL L , PS_BEN_DEFN_OPTN O , PS_BEN_DEFN_COST C WHERE L.LIFE_ADD_ COVRG IN ('1','2') AND O.PLAN_TYPE = L.PLAN_TYPE AND O.BENEFIT_PLAN = L.BENEFIT_PLAN AND C.BENEFIT_PROGRAM = O.BENEFIT_PROGRAM AND C.EFFDT = O.EFFDT AND C.PLAN_TYPE = O.PLAN_TYPE AND C.OPTION_ID = O.OPTION_ID AND C.CALC_RULES_ ID<>' ' AND C.CALC_RULES_ID = (SELECT MIN(C1.CALC_RULES_ ID) FROM PS_LIFE_ADD_TBL L1 , PS_BEN_DEFN_OPTN O1 , PS_BEN_DEFN_COST C1 WHERE L1.PLAN_TYPE = L.PLAN_TYPE AND L1.BENEFIT_PLAN = L.BENEFIT_PLAN AND O1.PLAN_TYPE = L1.PLAN_TYPE AND O1.BENEFIT_PLAN = L1.BENEFIT_PLAN AND C1.BENEFIT_PROGRAM = O1.BENEFIT_PROGRAM AND C1.EFFDT = O1.EFFDT AND C1.PLAN_TYPE = O1.PLAN_TYPE AND C1.OPTION_ID = O1.OPTION_ID) ORDER BY L.FACTOR_XSALARY, L.FLAT_AMOUNT, C.CALC_RULES_ID

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DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBNS10A.Step050.	HCBNS10	%Select(PLAN_TYPE,BENEFIT_PLAN,EFFDT) SELECT L.PLAN_TYPE ,L.BENEFIT_PLAN ,%DateOut(L.EFFDT) FROM PS_LIFE_ADD_TBL L , PS_BEN_DEFN_OPTN O , PS_BEN_DEFN_COST C WHERE O.PLAN_TYPE = L.PLAN_TYPE AND O.BENEFIT_PLAN = L.BENEFIT_PLAN AND C.BENEFIT_PROGRAM = O.BENEFIT_PROGRAM AND C.EFFDT = O.EFFDT AND C.PLAN_TYPE = O.PLAN_TYPE AND C.OPTION_ID = O.OPTION_ID AND C.CALC_RULES_ID = %Bind(CALC_RULES_ID) AND L.FACTOR_XSALARY = %Bind(FACTOR_XSALARY) AND L.FLAT_AMOUNT = %Bind(FLAT_AMOUNT) AND L.LIFE_ADD_COVRG IN (’1’,’2’) AND L.BN_FORMULA_ID = ’ ’ AND C.CALC_RULES_ID = (SELECT MIN(C1.CALC_RULES_ID) FROM PS_LIFE_ADD_TBL L1 , PS_BEN_DEFN_OPTN O1 , PS_BEN_DEFN_COST C1 WHERE L1.PLAN_TYPE = L.PLAN_TYPE AND L1.BENEFIT_ PLAN = L.BENEFIT_PLAN AND O1.PLAN_TYPE = L1.PLAN_TYPE AND O1.BENEFIT_PLAN = L1.BENEFIT_PLAN AND C1.BENEFIT_PROGRAM = O1.BENEFIT_PROGRAM AND C1.EFFDT = O1.EFFDT AND C1.PLAN_TYPE = O1.PLAN_TYPE AND C1.OPTION_ID = O1.OPTION_ID)

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DETAIL_ID	ROOT_SECTION	SQL_STMT
HCBNS10A.Step050.S	HCBNS10	UPDATE PS_LIFE_ADD_TBL SET BN_FORMULA_ID = %Bind(BN_FORMULA_ID) WHERE PLAN_TYPE = %Bind(PLAN_TYPE) AND BENEFIT_PLAN = %Bind(BENEFIT_PLAN) AND EFFDT = %Bind(EFFDT)
HCBNS20.Step010.D	HCBNS20	%Select(EMPLID, EMPL_RCD, PLAN_TYPE, EFFDT, FLAT_AMOUNT, FACTOR_XSALARY, BENEFITS_BASE, CALC_RULES_ ID) SELECT L.EMPLID ,L.EMPL_RCD ,L.PLAN_TYPE ,%DateOut(L.EFFDT) , L.FLAT_AMOUNT ,L.FACTOR_XSALARY ,L.BENEFITS_BASE , C.CALC_RULES_ID FROM PS_LIFE_ADD_BEN L , PS_LIFE_ADD_TBL T , PS_BEN_PROG_PARTIC B , PS_BEN_DEFN_PGM PG , PS_BEN_DEFN_OPTN O , PS_BEN_DEFN_COST C WHERE L.COVERAGE_ELECT = ’E’ AND L.FACTOR_ XSALARY<>0 AND T.PLAN_TYPE = L.PLAN_TYPE AND T.BENEFIT_PLAN = L.BENEFIT_PLAN AND T.LIFE_ADD_COVRG = ’3’ AND T.EFFDT = (SELECT MAX(X.EFFDT) FROM PS_LIFE_ADD_TBL X WHERE X.PLAN_TYPE = T.PLAN_TYPE AND X.BENEFIT_PLAN = T.BENEFIT_PLAN AND X.EFFDT < = L.EFFDT) AND B.EMPLID = L.EMPLID AND B.EMPL_RCD = L.EMPL_RCD AND B.EFFDT = (SELECT MAX(X.EFFDT) FROM PS_BEN_PROG_PARTIC X WHERE X.EMPLID = B.EMPLID AND X.EMPL_RCD = B.EMPL_RCD AND X.EFFDT < = L.EFFDT) AND PG.BENEFIT_PROGRAM = B.BENEFIT_ PROGRAM AND PG.EFFDT = (SELECT MAX(X.EFFDT) FROM PS_BEN_DEFN_PGM X WHERE X.BENEFIT_PROGRAM = PG.BENEFIT_PROGRAM AND X.EFFDT < = L.EFFDT) AND O.BENEFIT_PROGRAM = PG.BENEFIT_PROGRAM AND O.EFFDT = PG.EFFDT AND O.PLAN_TYPE = L.PLAN_TYPE AND O.BENEFIT_PLAN = L.BENEFIT_PLAN AND O.OPTION_TYPE = ’O’ AND C.BENEFIT_PROGRAM = O.BENEFIT_PROGRAM AND C.EFFDT = O.EFFDT AND C.PLAN_TYPE = O.PLAN_TYPE AND C.OPTION_ID = O.OPTION_ID AND C.COST_TYPE = ’P’ ORDER BY L.EMPLID,L.EMPL_RCD,L.PLAN_TYPE,L.EFFDT

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You can deduce from the information in the preceding table that Sections HCBNS10 and HCBNS20 are dependent on HCBNS06.

Task N-2-4: Reviewing Runtime for EOUFDATACONV

This section discusses:

- Understanding Runtime for EOUFDATACONV
- Querying the EOUF Tables

Understanding Runtime for EOUFDATACONV

All runtime information for EOUFDATACONV is stored in the following tables:

- PS_EOUF_DATACONV
- PS_EOUF_RUNSTATUS
- PS_EOUF_RUNDETAIL
- PS_EOUF_RUNCOUNT

The EOUFDATACONV Application Engine is the driver for the new Upgrade Data Conversion Framework and will be used instead of UPG_DATACONV to run data conversion in upgrades to application 9.1.

The EOUFDATACONV Application Engine leverages the Dependency Analysis to optimize the runtime of the data conversion. The runtime of the data conversion is improved in the new PeopleSoft release by running multiple instances of EOUFDATACONV in parallel, executing against a single set of dependency information. The optimal number of instances to be initiated will vary.

EOUFDATACONV determines which “Root Sections” are able to run and executes them. A Root Section is able to run when all Root Sections that are dependent on it have completed successfully.

In the event that multiple root sections are able to run at the same time, steps that have the largest number of dependent Root Sections and/or Root Sections that have the longest runtime (in a previous run), are given priority.

In the event of failure, the instance of EOUFDATACONV that encountered the error will mark the step as “Failed” and stop. All other instances of EOUFDATACONV will continue to run. Steps that are dependent on a “Failed” step will be marked as “Blocked” and will not be executed as part of the current run. Upon restarting the process, the “Failed” section and any “Blocked” sections will be executed.

The following list describes the EOUFDATACONV program flow:

- The run is initialized.

  This initial phase determines if this is a brand new run or if it is a restart of a previously failed run. If it is a new run, then EOUFDATACONV sets up a thread in PS_EOUF_RUNSTATUS.

- EOUFDATACONV performs a simple test to verify that there is work to do.

  If there is work to do, then EOUFDATACONV runs Data Conversion Application Engine Sections that have not already run. This is a fairly simple Do While loop that counts eligible sections left to run. If there are no more sections left to run, processing stops. The work inside the loop consists of executing a process to check the status of any other thread that is running. If a thread dies, it cannot clean itself up, so one of the other threads has to perform the cleanup. The cleanup mostly consists of setting the status flag in PS_EOUF_DATACONV to “F” for the AE Section that failed.

- SQLs run to look for work to do.

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The SQL object EOUF_FINDSECTIONTORUN finds the next eligible section to run. If the query returns nothing, we execute another SQL object called EOUF_COUNTSECTIONSNOTDONE to count how many Sections are left to run. If EOUF_FINDSECTIONTORUN returns no work to do and EOUF_COUNTSECTIONSNOTDONE returns Sections still need to be run, then there must be a Section already running that must complete before anything else can run. If there is no work to do, the loop issues a pause before the loop completes and executes the next loop.

- EOUFDATACONV performs more housekeeping to reset statuses on successful completion of all Data Conversion Application Engine Sections.
- A completion message is written to the log file.

Querying the EOUF Tables

For example queries to retrieve detailed information from the data conversion analysis and runtime tables, and to validate the dependency model, refer to “Upgrade to PeopleSoft 9.1: Data Conversion Analysis and Runtime Data in the EOUF Tables,” on My Oracle Support (Doc ID 1367476.1).

Task N-2-5: Reviewing EO Upgrade Framework Reporting

This section discusses:

- Understanding EO Upgrade Framework Reporting
- Reviewing the Tables Referenced Report
- Reviewing the Customization Impacts Report
- Reviewing Execution Report by Section – Duration
- Reviewing Execution Report by Section – Start Time
- Reviewing the Execution Report by Step
- Reviewing the Execution by Thread Report
- Reviewing the Thread Duration Report
- Reviewing the Execution Comparison Report
- Reviewing the Table Analysis Report

Understanding EO Upgrade Framework Reporting

You can query all tables populated and leveraged by the EO Upgrade Framework (as identified previously) through the various platform specific query tools or psquery. You can gather information in the EOUF tables to identify the following:

- Tables referenced in the data conversion code.
- Steps impacted by customizations (prior to the initial data conversion run).
- Performance issues (after the initial data conversion run).
- Impact of changes (run to run timing comparisons).

Oracle has delivered a series of standard reports to address the most commonly accessed information in the EOUF repository.

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Reviewing the Tables Referenced Report

EOUF0001.SQR lists all tables referenced within the Application Engine data conversion programs. For each table listed, the report displays the section and step in which it is used, whether it is a data source or data target table, and the type of SQL statement in which it is referenced. This report is sorted by table name. Data for this report comes from the PS_EOUF_ANALYSIS, PS_EOUF_DTLIDSQLS, and PS_EOUF_DTLIDTBLS tables. This report can be run anytime after the EOUFANALYSIS Application Engine program has run and populated the EOUF tables used by this SQR.

Reviewing the Customization Impacts Report

EOUF0002.SQR shows the section/steps within the Application Engine data conversion programs that referenced tables with custom added fields. This report is sourced from the PS_EOUF_ANALYSIS table and the PSPROJECTITEM table. This report must be run after the customizations project has been compared against the New Release Demo database.

Reviewing Execution Report by Section – Duration

EOUF0003.SQR shows the duration or execution time for each Application Engine section. Since this report is at a section level, the information is sourced from the PS_EOUF_RUNDETAIL table. The report is ordered by execution time with the poorest performing steps at the top. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion run on which you want to report.

Reviewing Execution Report by Section – Start Time

EOUF0004.SQR shows the duration or execution time for each section. Since this report is at a section level, the information will be sourced from the PS_EOUF_RUNDETAIL table. The report would be ordered by start time so that you can see the order in which the sections were executed. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion run on which you want to report.

Reviewing the Execution Report by Step

EOUF0005.SQR shows the execution time for each section and the associated steps that were run.

This report requires a trace of 16,384 or higher.

Since this report is at a step level, it assumes that a trace of 16,384 or higher has been run so that the step information could be obtained from the PS_EOUF_TIMINGS_DT table. If the appropriate trace has not been run, then a report is not created and output files will be produced. The report will be ordered by execution time with the poorest performing steps at the top.

Reviewing the Execution by Thread Report

EOUF0006.SQR shows the execution timing of each Application Engine section run as part of the data conversion process. This report is sorted so that you can see which sections were executed by each thread. This report is sourced from the PS_EOUF_RUNDETAIL table.

Reviewing the Thread Duration Report

EOUF0007.SQR shows the total duration time for each thread used during the data conversion process. This report is sourced from the PS_EOUF_RUNDETAIL table. It can be run anytime after the PS_EOUF_RUNDETAIL table has been populated from the data conversion run on which you want to report.

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Reviewing the Execution Comparison Report

EOUF0008.SQR shows the execution duration from the current run of data conversion as compared to the execution duration from the previous run of data conversion. This report is sourced from the PS_EOUF_RUNDETAIL table. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion runs on which you want to report.

Reviewing the Table Analysis Report

EOUF0009.SQR indicates how a particular application table is impacted by the create/alter scripts as well as the data conversion process during the PeopleSoft upgrade. This report is sourced from the PS_PTUALTRECDATA, PS_PTUALTRECFLDDAT, PS_EOUF_ALTRECDATA, PS_EOUF_ANALYSIS, and PS_EOUF_DTLIDTBLS tables. This report can be run after the Alter Analyzer and the AE Analyzer processes have successfully completed. This report is designed to be run against the initial pass database as the data stored in the tables during the Move to Production will differ.

Task N-3: Using the Upgrade Driver Program

The sequence of Application Engine sections that are run by an upgrade driver is maintained in the PS_UPG_DATACONV table. The Application Engine sections defined in the PS_UPG_DATACONV table are referred to as *root sections*.

There are three categories of Upgrade Groups:

- PRE – Data Conversion sections that must be executed in advance of all other sections.
- MAIN – Core Data Conversion
- POST – Data Conversion sections that must be executed after all other sections.

Note. Your specific upgrade may or may not contain pre-delivered PRE or POST groups.

Upgrade groups contain one or more Application Engine sections that are ordered within the group by sequence number. The Application Engine program UPG_DATACONV is used to execute PRE and POST data conversion groups. The Application Engine program EOUFDATACONV is used to execute the MAIN data conversion group.

When data conversion is executed using the UPG_DATACONV program, the sequence number is used to determine the “Absolute Run Order” of the upgrade group. When data conversion is executed using the EOUFDATACONV Application Program, the sequence number is used to determine the “Relative Run Order” of Application Engine sections that reference the same table or tables, but *not* the “Absolute Run Order” of the upgrade group(s).

Task N-4: Using the Upgrade Drivers Page

This section discusses:

- Understanding the Upgrade Drivers Page
- Accessing the Upgrade Drivers Page

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- Adding the New Upgrade Drivers Section Page
- Inactivating the Upgrade Drivers Section

Understanding the Upgrade Drivers Page

Before you run data conversion, you may need to change what the Upgrade Driver program runs. You can add, remove, or deactivate Application Engine sections through the Upgrade Drivers page.

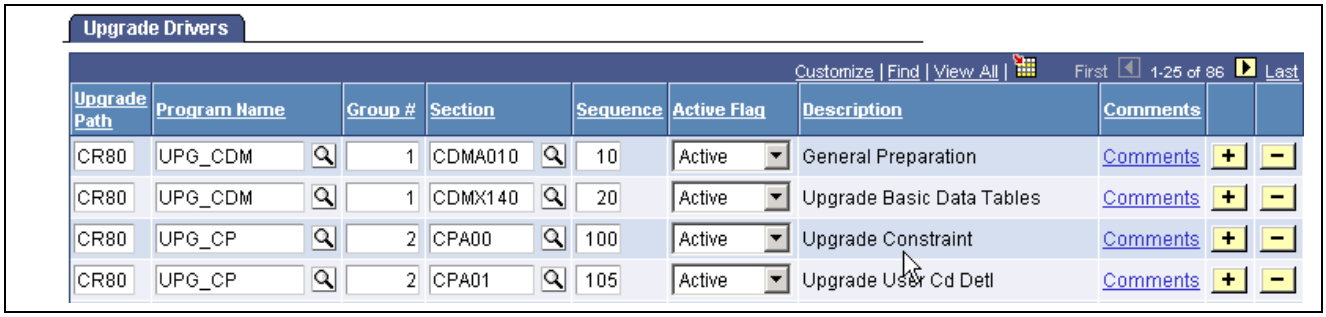
You do not have an active portal on your Copy of Production during data conversion, so you need to view and update the Data Conversion Definitions on your Demo database and then copy the updated data to your Copy of Production database.

Task N-4-1: Accessing the Upgrade Drivers Page

To access the Upgrade Drivers page:

1. From your browser, sign in to the Demo database.
2. Select Set Up HRMS, Upgrade, Data Conversion.
3. Enter your upgrade path:
4. Click Search.

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



Upgrade Drivers page

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

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Task N-4-2: Adding the New Upgrade Drivers Section Page

Follow the instructions below to add a new section to the Upgrade Drivers page.

Note. To add a new section, the Application Engine program and section must exist on the Demo database.

To add a new section to the Upgrade Drivers page:

1. From your browser, sign in to the Demo database.
2. Select Set Up HRMS, Upgrade, Data Conversion.
3. Select Add a New Value.
4. Click Add.
5. Enter values for Upgrade Path and Program Name.
6. Enter a value for Group #.

   Note. Each group number corresponds to a data conversion step in the PeopleSoft Change Assistant template. If you select a group number that already exists in the PS_UPG_DATACONV table, your section will be executed when PeopleSoft Change Assistant runs the data conversion step that corresponds to the group number you selected. Alternatively, if you assign a group number to your new section that does not already exist in PS_UPG_DATACONV, you must add a new step to your PeopleSoft Change Assistant template. The new template step will have the same properties as the other data conversion steps, except for the group number specified in the step properties Parameters box.

7. Enter values for Section and Sequence.

   The Description and Comments fields are optional.
8. Click Save.
9. When you have completed all changes, sign in to your Demo database using PeopleSoft Data Mover and run the following script to export the updated data conversion data:

   ```
   DLUPX03E.DMS
   ```
10. Sign in to your Copy of Production database using PeopleSoft Data Mover and run the following script to load the updated data conversion data:

    ```
    DLUPX03I.DMS
    ```

    See the PeopleTools: Change Assistant PeopleBook for your new release, Appendix: “Using a Change Assistant Template.”

Task N-4-3: Inactivating the Upgrade Drivers Section

Follow the instructions below to deactivate a section on the Upgrade Drivers page. Once deactivated, the section will not run as part of data conversion.

To inactivate a section on the Upgrade Drivers page:

1. From your browser, sign in to the Demo database.
2. Select Set Up HRMS, Upgrade, Data Conversion.
3. Enter your upgrade path:
4. Click Search.

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5. Find the row with the Program Name and Section you want to remove and change the value of the Active Flag field to *Inactive*.
6. Click Save.
7. When you have completed all changes, sign in to your Demo database using PeopleSoft Data Mover and run the following script to export the updated data conversion data:

   ```
   DLUPX03E.DMS
   ```

8. Sign in to your Copy of Production database using PeopleSoft Data Mover and run the following script to load the updated data conversion data:

   ```
   DLUPX03I.DMS
   ```

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APPENDIX O

Using the Comparison Process

This appendix discusses:

- Understanding the Comparison Process
- Understanding Upgrade Compare Reports

Task O-1: Understanding the Comparison Process

This section discusses:

- Reviewing the Source and Target Columns
- Reviewing the Action Column
- Reviewing the Upgrade Column
- Putting It All Together

During the upgrade you run a compare process and then review the resulting reports. The compare process first compares every property of an object definition on the Source database to the properties of object definitions on the Target database. The PeopleSoft system tracks object changes using the contents of the PSRELEASE table, and the value of two fields, LASTUPDDTTM, and LASTUPDOPRID, used in the PeopleSoft PeopleTools tables, as follows:

- The PSRELEASE table maintains the Comparison Release Level. This table contains rows of data for every release level at which the database has ever existed. The first column in this table, RELEASEDTTM, contains a date/time stamp identifying when each release level was "stamped." The second column, RELEASELABEL, identifies the release level. The format of a release label is *M XX.XX.XX.YYY*, where *M* is the market code, *XX* is an integer from 0 to 99, and *YYY* is an integer from 0 to 999. A release label has two parts: the PeopleSoft release number (*M XX.XX.XX*) and the customer release number (*YYY*). Each time you customize your production database, you can stamp it with a new customer release level to help you track your changes over time. You should not change any portion of the PeopleSoft release number unless specifically instructed to do so.
- The LASTUPDDTTM field in our PS*object*DEFN tables—such as PSRECDEFN, PSPNLDEFN, and so on—stores a date/time stamp of when each object was last modified.
- The LASTUPDOPRID field stores the operator ID of the user who made the modification. If Oracle made the modification, the proprietary ID *PPLSOFT* is used.

Note. Maintain Security prevents you from creating an operator named PPLSOFT.

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If an object definition is defined differently in the Source database than in the Target database, the compare process will check to see whether either object definition has changed since the comparison release. If the object's LASTUPDDTTM value is greater than the RELEASEDTTM value for the comparison release level (stored in PSRELEASE), the object has changed. If the object's LASTUPDDTTM value is equal to or less than RELEASEDTTM, the object has not changed (since the comparison release). Whether the compared object has changed or not, if it has *ever* been changed prior to the comparison release by someone other than Oracle (LASTUPDOPRID does not equal 'PPLSOFT'), the object is identified as a customization.

After you run a compare report, you see the following information when you open an object type in the upgrade project from the Upgrade Tab of PeopleSoft Application Designer. This is called the PeopleSoft Application Designer Upgrade Definition window.

Task O-1-1: Reviewing the Source and Target Columns

The status of each object is reported as it appears on the Source database and the Target database. The following table explains the various status types:

Status Type	Definition
Unknown	The object has not been compared. This is the default status for all objects inserted manually into a project and the permanent status of all non-comparison objects.
Absent	The object was found in the other database, but not in this one. When upgrading to a new PeopleSoft release, all of our new objects should have Absent status in the Target database and all of your new objects should have Absent status in the Source database.
Changed	The object has been compared, its LASTUPDOPRID value is *PPLSOFT*, and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In other words, Oracle modified the object since the comparison release.
Unchanged	The object has been compared, its LASTUPDOPRID value is *PPLSOFT*, and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In other words, Oracle last modified the object prior to the comparison release.
*Changed	The object has been compared, its LASTUPDOPRID value is not *PPLSOFT*, and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In this case, the customer has modified the object since the comparison release.

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Status Type	Definition
*Unchanged	The object has been compared, its LASTUPDOPRID value is not *PPLSOFT*, and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In this case, the customer last modified the object prior to the comparison release.
Same	The object has been compared and is defined as the same in both databases. When an object in one database has this status, so will its counterpart in the other database. This status would never be seen when performing a database comparison because in that case, the project is only populated with objects defined differently. However, it can occur when performing a project comparison because in a project comparison, the project contents are static; the project is not repopulated based on the comparison results.

Task O-1-2: Reviewing the Action Column

The default actions for each object that you compared are reported in the Action column. The compare sets the action column based on what you need to do to make the Target database consistent with the Source database. You should not change these actions. You can decide whether or not to accept each action by setting the Upgrade value. The following table explains the various action types:

Action Type	Definition
Copy	Object will be added to the Target database
Copy Prop (Records and Fields only)	Object will be added to the Target database
Delete	Object will be deleted from the Target database.
None	No action will be taken on this object.

The PeopleSoft system assigns one of these action types to every object in a comparison project and in the compare reports. However, these actions are not necessarily carried out during the copy process. The value of the Upgrade column for each object makes that determination.

Task O-1-3: Reviewing the Upgrade Column

The Upgrade values for each object – YES or NO – determine whether the object action will be carried out during the copy process. The upgrade orientation you assign during the compare process determines these settings. You can orient the Upgrade to keep Oracle changes or to retain your changes in the Target database. Whichever orientation you choose, you will still have the option to set each Upgrade value individually before launching the copy process.

You may find that after the compare process, your project contains objects that show up as Unchanged on the Demo database and Changed on the Copy of Production and the Upgrade column is not checked. What this status combination means is that the PeopleSoft object on your Copy of Production was changed more recently than on the Demo database. In these instances, Oracle recommends that you accept the Demo database version of the object.

Task O-1-4: Putting It All Together

The following chart summarizes every possible Status, Action, and Upgrade value that could be set by the compare process to a single object:

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Source Status	Target Status	Action	Oracle-delivered	Keep Customizations
(Any)	Absent	COPY	YES	YES
Absent	Changed or Unchanged	DELETE	YES	YES
Absent	Changed* or Unchanged*	DELETE	NO	NO
Changed	Changed or Unchanged	COPY	YES	YES
Changed	Changed* or Unchanged*	COPY	YES	NO
Unchanged	Changed	COPY	NO	NO
Unchanged	Unchanged	COPY	YES	YES
Unchanged	Changed* or Unchanged*	COPY	YES	NO
Changed*	Changed or Unchanged	COPY	NO	YES
Changed*	Changed* or Unchanged*	COPY	YES	YES
Unchanged*	Changed or Unchanged	COPY	NO	YES
Unchanged*	Changed*	COPY	NO	NO
Unchanged*	Unchanged*	COPY	YES	YES

Task O-2: Understanding Upgrade Compare Reports

This section discusses:

- Reviewing Report Columns
- Using Reports

When you run the compare process, it creates reports to help you understand what objects differ between the Source and Target databases, and how they differ. If you have documentation of your database modifications, you should retrieve it before reviewing these reports. This will help you understand how the Target objects have changed and enable you to better compare the Target version of the object with the Source version. If you are upgrading to a new PeopleSoft release, you should also review the release notes for your product. These notes will identify and explain object changes in the New Release Demo database.

Upgrade reports can be a little intimidating at first glance, until you understand what data you are looking for and how best to use it. This section includes information to help you use the reports.

Task O-2-1: Reviewing Report Columns

For the most part, the columns in upgrade reports correspond with the columns you see in PeopleSoft Application Designer's upgrade definition window. Moving from left to right, you see the Name of the object, then other key columns that vary by object type, then the Source and Target status, the Action value and Upgrade flag (*Yes* or *No*).

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After these columns are three more that are not included in PeopleSoft Application Designer. The first is Attribute. This tells you the type of difference that was found between the two objects. For example, record field attribute values include *Use/Edit*, which identifies key or audit differences, and Default Field Name (*Def. Fldnm*), which identifies differences in a default value. Lastly, there is a Source column and a Target column. These wide columns display the actual differences between the object definitions. For example, on a *Use/Edit* attribute recfield difference, the Source column might contain *Xlat Table Edit* while the Target column is empty. This means that the Source record field has a translate table edit while the Target record field does not.

If you are unsure of the meaning of any value in the last three report columns, open the PeopleSoft PeopleTools tool that edits the particular object. The values in these columns correspond directly to dialog options in the tool.

Task O-2-2: Using Reports

Oracle delivers several cross-reference reports that you can run to provide information about the inter-relationships between various objects. Oracle delivers these reports in the form of SQRs (found in *PS_HOME*\SQR), Crystal Reports (found in *PS_HOME*\CRW\ENG), and Queries.

The following table describes the various cross-reference reports:

Object Type(s)	Report Name	Report Description
Applications and Fields	XRFAPFL	Lists all application windows, such as General Tables, in alphabetical order, as well as the fields within each window. For each field, the report details the Field Name, Field Type, Length, and Format, as well as all the record and page definitions that contain the field (within the window).
Fields Referenced by PeopleCode Programs	XRFFLPC	Lists all PeopleCode programs in alphabetical order by associated record definition/field. The report includes type of field and lists all fields referenced in the PeopleCode program.
Fields and Panels	XRFFLPN	Lists all fields in alphabetical order. The report includes the names of all record and page definitions in which each field is used, as well as the Long Name of each field.
Records and Fields	XRFFLRC	Lists all fields in alphabetical order. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field, and includes the names of all record definitions that contain the field.
Field Listing	XRFIELDS	Lists all fields in alphabetical order. The report includes Field Type, Length, Format, Long Name and Short Name.

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Object Type(s)	Report Name	Report Description
Menu Listing	XRFMENU	Lists application windows in alphabetical order. The report details all menus within each window, and all page definitions within each menu. It also includes the associated search record definition name and detail page definition name.
Panel Listing	XRFPANEL	Lists all page definitions in alphabetical order.
PeopleCode Programs and Field References	XRFPCFL	Lists record definitions that contain fields with PeopleCode program attributes. The report includes the Field Name, as well as the associated record definitions and fields referenced in the PeopleCode program.
Panels with PeopleCode	XRFPNPC	Lists all pages that contain fields with PeopleCode attributes. For each page, the report includes the name of the record definition(s) that contain the field as well as the Field Name and Type.
Fields and Records	XRFRCFL	Lists all fields in alphabetical order by associated record definition name. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field.
Records and Panels	XRFRCPN	Lists all record definitions in alphabetical order. The report includes the menu and page definitions associated with each record definition.
Window Listing	XRFWIN	Lists all application windows in alphabetical order.

In addition to using our standard cross-reference reports, you can also generate ad hoc reports to extract the exact combination of information you need. Or, you can create permanent custom reports for information you extract on a regular basis.

Oracle recommends that you mark your upgrade reports using a color-coding system to help you quickly identify what you need to do to certain objects.

If you have several people reviewing sections of the reports, a good documentation policy is to have everyone on your review cycle initial and date the action defaults and overrides they select.

You may also find it easier to change some objects manually after the upgrade, rather than copying the new versions from the Source database.

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