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Getting Started on Your PeopleTools Upgrade

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About This Documentation

Understanding This Documentation

This documentation is designed to get you ready for your upgrade of Oracle's PeopleSoft software. You must complete the tasks set forth in this guide before beginning the actual upgrade. The tasks in this documentation guide you through planning your upgrade as well as installing the necessary software.

This preface describes information you should know, including PeopleSoft-specific documentation conventions, before you begin working with PeopleSoft products and documentation.

Audience

This guide assumes you have a basic understanding of PeopleSoft software. One of the most important components of a successful upgrade of your PeopleSoft system is your already accumulated, on-site experience. You should be familiar with your operating hardware environment and have the necessary skills to support that environment. You should also have a working knowledge of:

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

Oracle recommends that you complete training before performing an upgrade.

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

For the purposes of this document, three groupings of project roles are identified as the primary audiences for this guide:

- Project management – Includes the project manager.
- Technical – Includes technical upgrade resources and PeopleSoft installers.
- Functional – Includes functional resources.

In the following section, Document Organization, each chapter is annotated with the primary audience for that chapter (and the secondary audience as appropriate).

Document Organization

This guide is divided into chapters to assist you in planning your upgrade and installing the necessary software:

- "Planning Your Upgrade" (primary audience: product management; secondary audiences: technical and functional)
- "Starting Your Upgrade" (primary audience: technical)
- "Improving Performance" (primary audience: technical; secondary audience: functional)

This guide also contains appendixes. When additional information is relevant to an upgrade topic, you are directed to the appropriate appendix.

Typographical Conventions

To help you locate and understand information easily, this documentation uses the conventions listed in the following table:

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.
<i>Italic</i>	Indicates field values, emphasis, and book-length publication titles. Italic also refers to words as words or letters as letters, as in this example: Enter the letter <i>O</i> .
Initial Caps	Field names, commands, and processes are represented as they appear in the window, menu, or page.
lower case	File or directory names are represented in lower case unless they appear otherwise in the interface. Scripts are represented in lower case and may not exactly match the case of the generated scripts.
Menu, Page	A comma (,) between menu and page references indicates that the page exists in 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 <i>See</i> refer you to additional documentation that will help you implement the task at hand. We strongly recommend that you reference this documentation. Cross-references under the heading <i>See Also</i> refer you to documentation that has additional information about the topic.
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 <i>Note</i> 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 <i>Important!</i> is crucial and includes information about what you need to do for the system to function properly.

Convention	Description
<i>Warning!</i> Warning text.	A note that begins with <i>Warning!</i> contains crucial configuration information or implementation considerations; for example, if data might be lost or corrupted. Pay close attention to warning messages.

Related Information

Throughout this guide, you will find references to related information that may help with your PeopleSoft upgrade. You can find much of the following related information on My Oracle Support:

- Benchmark performance reports.
These reports provide performance information about those platforms that have been performance tested.
- PeopleSoft Change Assistant documentation.
- Hardware and software requirements guides.
The PeopleSoft hardware and software requirements guide and the application guide for your product list the hardware and software requirements for the new release.
- Installation guides.
The installation guide for PeopleSoft PeopleTools and the application guide for your product document how to install the new release.
- New Feature Overview
The New Feature Overview documents what functionality has changed in each new release. Oracle produces the New Feature Overview for PeopleSoft PeopleTools, as well as the Update Image Overview for product releases.
- Oracle's PeopleTools product documentation, including:
 - *PeopleTools: Application Designer Developer's Guide* for your new release.
 - *PeopleTools: PeopleSoft Component Interfaces* for your new release.
 - *PeopleTools: Change Assistant and Update Manager* for your new release.
- Platform certifications.
Oracle lists supported platforms for PeopleSoft servers, clients, and third-party products.
- Product documentation.
The documentation for your product provides detailed product information.
- Red papers.
The PeopleSoft red paper library on My Oracle Support includes technical documents that provide details on topics such as online performance configuration guidelines.
- Upgrade guides.
Product-specific upgrade guides provide upgrade instructions for your particular upgrade path—that is, from your current release to your new release.
- Upgrade pages.
The product-specific upgrade page on My Oracle Support is the starting point for your upgrade. It contains the upgrade documentation and related files.

Chapter 1

Planning Your Upgrade

This chapter discusses:

- Understanding the Planning Process
- Organizing Your PeopleTools Upgrade
- Verifying the Supported Upgrade Path
- Learning About PeopleSoft Change Assistant

Understanding the Planning Process

Upgrading Oracle's PeopleSoft PeopleTools software requires planning, resources, testing, and training. This guide provides information on how to plan for your upgrade and install the new release. This chapter takes you through the planning process for your upgrade to ensure a smooth transition to the updated software.

Note. You can use the PeopleTools patch deployment package (DPK) for your new release on Windows or Linux. The PeopleTools deployment packages deliver pre-installed PeopleSoft components that can be deployed onto your environment. The PeopleTools DPKs also contain the upgrade documentation, upgrade template, and files. See the PeopleSoft PeopleTools Patches Home Page on My Oracle Support (Doc ID 2062712.1) for information regarding the PeopleTools patch deployment packages including installation instructions. When you have completed the deployment to your environment, return to this document and complete the tasks beginning with the Starting Your Upgrade chapter task Applying the PeopleTools Upgrade Change Package, step Setting Up Change Assistant.

Task 1-1: Organizing Your PeopleTools Upgrade

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

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

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

- Review the PeopleSoft PeopleTools release.
Make sure to download the most recent version of the PeopleSoft PeopleTools upgrade documentation. Go to My Oracle Support and search for the PeopleSoft PeopleTools upgrade documentation for your release.
- Have your PeopleSoft PeopleTools Installation guide for your relational database management system (RDBMS) nearby.
The installation guide contains useful information that can help you with your upgrade process. Go to My

Oracle Support and search for the PeopleSoft PeopleTools Installation guide for your new release.

- Review the PeopleSoft PeopleTools New Feature Overview.

Read the PeopleSoft PeopleTools New Feature Overview prior to starting your upgrade to determine what has changed in the system and to familiarize yourself with the new features. The New Feature Overview also indicates whether you need to upgrade any other portions of your system, such as your RDBMS software or batch files. Make sure that you have the most current version of the New Feature Overview. Oracle strongly encourages you to read the entire document before beginning the upgrade process. It is important to be aware of any new support policies as well as any new features. Go to My Oracle Support and search for the PeopleSoft PeopleTools New Feature Overview for your release.

Note. If you skipped any PeopleSoft PeopleTools maintenance releases, download and read the New Feature Overview corresponding to the release(s) that you skipped, in addition to the New Feature Overview for this PeopleSoft PeopleTools release.

- Review PeopleSoft Online Help (PeopleBooks).

If you need additional information after reading the New Feature Overview, refer to the product documentation. The documentation for the new release is available once you have installed PeopleSoft Online Help (PeopleBooks).

See the PeopleSoft PeopleTools installation guide "Installing PeopleSoft Online Help" for your database platform on your new release.

- Review supported platform information.

To find supported platform information, go to My Oracle Support, Certifications, and search for certifications information for your PeopleSoft PeopleTools release.

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

- Download required for upgrade fixes.

Before you start applying this upgrade, check the list of required fixes. It is very important that you download all Required for Upgrade fixes for PeopleSoft PeopleTools. Go to My Oracle Support, Patches & Updates, PeopleSoft, and search for the PeopleSoft PeopleTools Required for Upgrade fixes for your new release.

- Freeze development.

Freeze development on your production database during this upgrade.

- Ensure that your workstation meets the minimum requirements.

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

Important! You will need to use a Microsoft Windows client workstation that is supported for your new PeopleSoft PeopleTools release in order to upgrade.

- Review performance recommendations.

Plan for performance issues before beginning your upgrade.

See Appendix: "Improving Performance."

Task 1-2: Verifying the Supported Upgrade Path

Be aware that not all application releases are certified and supported to run on all PeopleSoft PeopleTools releases. Please check the PeopleSoft policy information in the article *Lifetime Support Summary for PeopleSoft Releases* (Doc ID 1348959.1) on My Oracle Support for further details on the support policy for your particular application. If you are planning to do a PeopleSoft PeopleTools upgrade, do not continue until you have verified that your application is supported on the target PeopleSoft PeopleTools release.

Warning! If you are on an older application release that is on Sustaining Support, upgrading your PeopleTools may affect your future application upgrade. For more information see My Oracle Support Doc ID: 1348959.1.

Task 1-3: Learning About PeopleSoft Change Assistant

PeopleSoft Change Assistant is a tool designed to assist you in performing PeopleSoft upgrades. PeopleSoft Change Assistant operates on an upgrade Change Package template that outlines the upgrade steps to be performed. PeopleSoft Change Assistant creates the road map of the upgrade steps to be performed based on information you provide during the setup of the environment and the Change Assistant job. PeopleSoft Change Assistant then runs each step by launching programs and processes, monitoring the progress, performing the navigation needed to complete the step, and checking for errors. In addition, PeopleSoft Change Assistant displays documentation relevant to the current step. PeopleSoft Change Assistant can improve the quality of your upgrade, reduce errors, and shorten the amount of time it takes to complete an upgrade. In addition, PeopleSoft Change Assistant enables you to run certain steps in the upgrade unattended. During the unattended process, PeopleSoft Change Assistant can inform you, by email, if errors occur.

See the PeopleTools: Change Assistant PeopleBook for your new release.

Chapter 2

Starting Your Upgrade

This chapter discusses:

- Understanding How to Start an Upgrade
- Installing the New Release
- Applying a PeopleTools Patch
- Installing PeopleSoft Change Assistant
- Setting the Configuration Manager Profile
- Applying the PeopleTools Upgrade Change Package
- Reviewing Upgrade Step Properties

Understanding How to Start an Upgrade

In this chapter, you will begin your upgrade of Oracle's PeopleSoft PeopleTools software. You will start by installing the new release, continue with retrieving and applying upgrade files, and finish by applying the PeopleTools upgrade Change Package in PeopleSoft Change Assistant.

Important! Remember that you must complete all steps in this guide before beginning your upgrade.

Note. If you used DPK to deploy PeopleSoft PeopleTools on your Windows or Linux environment, go to the Applying the PeopleTools Upgrade Change Package task in this chapter and begin with the Setting Up Change Assistant step.

Task 2-1: Installing the New Release

To upgrade, you must first install the new release:

1. Download the PeopleSoft PeopleTools installation guide for your database platform.
See My Oracle Support, select the Knowledge tab, PeopleSoft Enterprise PT PeopleTools, and enter PeopleTools installation guides in the Search field. Download the PeopleTools installation guide for your new release.
2. Install your new PeopleSoft PeopleTools software following the instructions in the PeopleTools installation guide for your database platform. You will be installing a separate PS_HOME for the purpose of the upgrade.

Note. Do *not* install into an existing PS_HOME or PS_CFG_HOME.

Note. As of PeopleTools 8.56, a full PeopleTools codeline is installed when installing a PeopleTools patch. You no longer need to overlay the patch files over the base release.

Task 2-2: Applying a PeopleTools Patch

In this task, you will review the PeopleSoft PeopleTools Required at Upgrade patch from Patches & Updates on My Oracle Support. As part of the PeopleSoft PeopleTools upgrade, you will incorporate the application of a PeopleSoft PeopleTools patch into the upgrade process. Apply the patch for the new PeopleSoft PeopleTools release that you are installing; do not apply a patch for a different PeopleSoft PeopleTools release.

To find the latest PeopleTools Patch, go to My Oracle Support, Patches & Updates, PeopleSoft PT PeopleTools, and search for available patches for the new PeopleSoft PeopleTools release. Review the documentation delivered with the patch to fully understand the fixes.

As of PeopleTools 8.56, a full PeopleTools codeline is installed when installing a PeopleTools patch. You no longer need to overlay the patch files over the base release.

To apply the latest PeopleSoft PeopleTools Required at Upgrade patch:

1. Go to My Oracle Support and select the Patches & Updates tab.
2. Click the Product or Family (Advanced) link.
3. Select the Include all products in a family check box.
4. Select the following search criteria:
 - For Product, select *PeopleSoft Enterprise PT PeopleTools*.
 - For Release, select your new PeopleTools release.
 - In the next search filter, select *Language* from the drop-down menu. In the adjacent field, select *American English* as your language.
 - Click the plus icon to add another search filter.
 - In the new search filter, select *Install/Upgrade (PeopleSoft)* from the drop-down menu. In the adjacent field, select *Required at Upgrade*.
5. Click Search.
6. Select the update ID for the PeopleSoft PeopleTools patch that you want to apply.

Note. Rather than taking the minimum patch level suggested on the product upgrade page, take the latest PeopleSoft PeopleTools patch so that you are completely up-to-date with all PeopleSoft PeopleTools updates.

7. Before applying the PeopleTools patch, review the documentation included with the patch.
 8. Download and install the PeopleSoft PeopleTools patch into your new release PS_HOME.
-

Note. If the patch includes database changes, you will apply the database changes later in the upgrade; do not apply the database changes at this point in time.

See the PeopleSoft PeopleTools installation guide "Using the PeopleSoft Installer" for your database platform on your new release.

Task 2-3: Installing PeopleSoft Change Assistant

As part of the PeopleSoft PeopleTools installation or the application of the PeopleSoft PeopleTools patch, PeopleSoft Change Assistant should have been installed. If the patched version of Change Assistant has not been installed yet, install it now.

Note. On some Microsoft Windows platforms, the graphics do not appear as they should in PeopleSoft Change Assistant. To see the graphics, please refer to the PDF documentation.

Task 2-4: Setting the Configuration Manager Profile

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

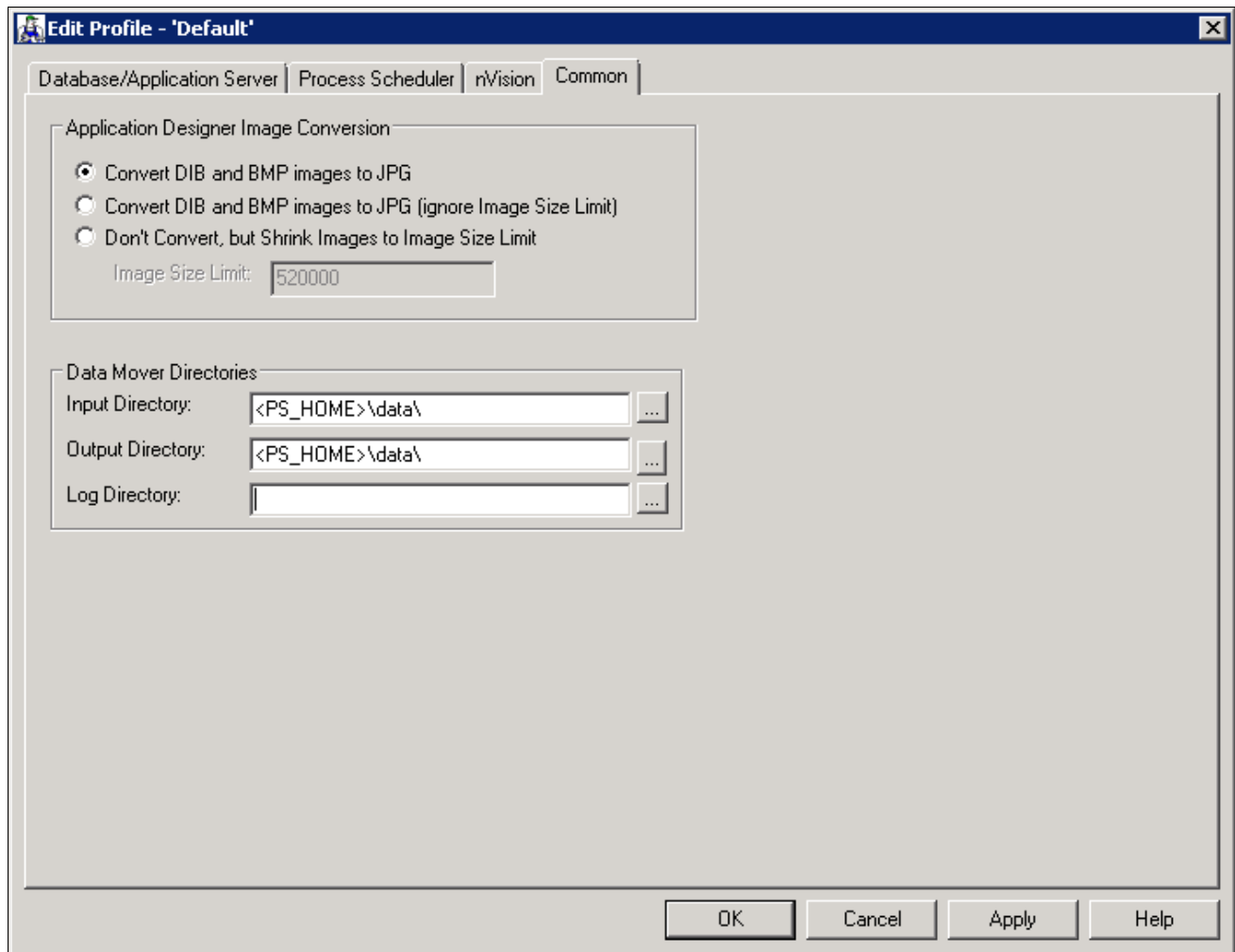
Verify that the Configuration Manager settings are appropriate for your *current* release directory (for example, similar to your current production environment). PeopleSoft Change Assistant uses the information in your Configuration Manager profile to run automated steps on the current release early in the upgrade.

To set the profile:

1. Open Configuration Manager.

- On the Profile tab, select the Default profile, click Edit, and then select the Common tab.

The Edit Profile - 'Default' dialog box appears:



Edit Profile - 'Default': Common tab

- Set the Input Directory to NEW_RELEASE\data.
- Set the Output Directory to NEW_RELEASE\data, the same name as the Input Directory.
- Leave the Log Directory field as is.
Change Assistant sets the Log Directory value.
- Select the Process Scheduler tab and verify your SQR settings.
PeopleSoft Change Assistant will use these settings to launch SQR.

Task 2-5: Applying the PeopleTools Upgrade Change Package

This section discusses:

- Understanding the PeopleTools Upgrade Change Package Application
- Downloading the PeopleTools Upgrade Change Package

- Setting Up Change Assistant

Understanding the PeopleTools Upgrade Change Package Application

On the My Oracle Support upgrade documentation page for the new release, you will find the PeopleSoft upgrade Change Package. Using PeopleSoft Change Assistant, you can apply the Change Package and create a job for your initial upgrade pass.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release.

Task 2-5-1: Downloading the PeopleTools Upgrade Change Package

Download the PeopleTools upgrade Change Package from the PeopleTools upgrade page on My Oracle Support.

Note. If you used DPK to deploy PeopleSoft PeopleTools on Windows or Linux, you do *not* need to perform this step. Begin with the next step, Setting Up Change Assistant.

Task 2-5-2: Setting Up Change Assistant

To run an upgrade using PeopleSoft Change Assistant, configure PeopleSoft Change Assistant and apply the PeopleTools upgrade Change Package to create a job for your upgrade.

To set up PeopleSoft Change Assistant and apply the Change Package:

1. Launch PeopleSoft Change Assistant.
2. Configure PeopleSoft Change Assistant Action:
 - a. Select Update Manager and click Next.
 - b. On the General Options page, fill in the required information and click Next.
 - c. On the PUM Source Options page, skip filling out this screen and click Next.
 - d. On the EM Hub Options page, skip filling out this screen and click Next.
 - e. On the Additional Options page, optionally fill out any additional information and click Next.
 - f. On the Select Task page, select Upgrade to a New Release of PeopleTools and click Finish.
 - g. On the Change Package Settings page, fill in the required information and click Next.
 - h. On the Select Target Database page, select or create a Target Database and click Next.
 - i. On the Select PeopleTools Upgrade page, select the correct package and patch and click Next.
 - j. On the Check Compatibility page, click Next.
 - k. On the Apply Summary page, review the displayed information and click Finish.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release.

Task 2-6: Reviewing Upgrade Step Properties

When you open the upgrade template using PeopleSoft Change Assistant, there will be a set of properties for each step. Oracle includes a subset of those properties in this upgrade documentation. At the end of each upgrade step, there will be a Properties table that lists the properties values that apply to that step. The following graphic provides an example of the information that will be in the upgrade documentation:

Properties				
Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	DB2 z/OS	All

Example of properties information

Property	Value	Definition
Database Orientation	Source	The step runs on the Source database. This is not applicable for PeopleSoft PeopleTools upgrades.
Database Orientation	Target	The step runs on the Target database. This is your upgrade database.
Pass Type	All	The step runs for all types of upgrade passes.
Products	All	You run the step regardless of which products you are upgrading.
Products	Specific product names	You run the step only if you are upgrading the products specified. You specified which products you are upgrading when you set up your Change Assistant job configuration.
Platforms	All	You run the step regardless of which platform your database uses.
Platforms	One or more of the following platform names: <ul style="list-style-type: none"> • DB2 z/OS • DB2 LUW • MS SQL Server • Oracle 	You run the step only if your database uses one of the specified platforms. You specified which platform you are using when you set up your Change Assistant job configuration.

Property	Value	Definition
Languages	All	You run the step regardless of which language your database uses.
Languages	Specific language names	You run the step only if your database uses the languages specified. You specified which languages are installed on your database when you set up your Change Assistant job configuration.

Note. "DB2 for Linux, UNIX and Windows" and "DB2 for z/OS" are the official IBM names for the RDBMS. For the sake of brevity, PeopleSoft upgrade documentation often refers to "DB2 for Linux, UNIX and Windows" as "DB2 LUW" and "DB2 for z/OS" as "DB2 z/OS."

Appendix A

Improving Performance

This appendix discusses:

- Understanding Performance Improvement
- Planning Your Upgrade for Performance
- Improving Performance for Your Platform
- Consulting Oracle's Global Support Center

Understanding Performance Improvement

Performance is always a challenge when you are upgrading. Much of the data currently in your database will be affected. No other batch processing works quite like it. Upgrade performance is sensitive to your unique environment and data. These performance recommendations are designed to help you improve performance during your upgrade.

Task A-1: Planning Your Upgrade for Performance

Review the following guidelines to help plan for better upgrade performance:

- Provide as much hardware, memory, and disk space as you can.
- Run long processes on a dedicated server, not the client.
Configure that server similarly to your production environment.
- Use a dedicated workstation, configured like the production environment.
- Provide an application server and process scheduler for the Target database on the new PeopleSoft release.
- Know which tables are your largest.
This information will be valuable during the upgrade.

Task A-2: Improving Performance for Your Platform

This section discusses:

- Using Oracle
- Using DB2

Task A-2-1: Using Oracle

You should use the cost-based optimizer during the upgrade. The application engine scripts use MetaSQL to run the update statistics command at various times during data conversion. If you are running the rule-based optimizer, you will not take advantage of these statements.

When running the alter scripts, remember the Oracle hint `/*APPEND*/`. This command will improve the performance of your alter script if you are doing an "Alter by Rename." This hint performs like an Oracle Direct Load Insert and does not capture redo or recovery information. The syntax is as follows:

```
INSERT /*+ APPEND */ INTO TABLENAME (FIELD1, FIELD2, ...
```

Make sure your database administrator has turned autoextend on. Autoextend allows tablespaces to grow larger than their set maximum size and will be useful during the upgrade process since tablespaces grow several times larger than they would in production.

Alter the tablespace for PSIMAGE and increase it to 200 MB; autoextend on the next 10 MB; set the maxsize to *unlimited*.

Task A-2-2: Using DB2

To improve performance for your DB2 z/OS platform:

- Perform all recommended update statistics on the system catalog as well as the application tablespaces.
- Additionally, you must also apply all the required IBM patches listed in the document "Important PTFs for the PeopleSoft on DB2 for z/OS."

See "Important PTFs for the PeopleSoft on DB2 for z/OS," on My Oracle Support. (Search for the article name.)

Task A-3: Consulting Oracle's Global Support Center

If you do have a problem with your upgrade, contact Oracle's Global Support Center. Oracle will be able to give you a solution to the problem faster if you supply the following information:

- Details about the table row counts and indexes available on the tables involved in the processing:
 - Include indexes in your physical database, not those defined in PeopleSoft Application Designer.
 - Mention any additional indexes that you custom-added; they could be getting in the way.
- RDBMS (Oracle, SQL Server, or DB2, and so on) and RDBMS release (for example, Oracle 10.2.0.5 or 11.2.0.3).
- If you are running on Oracle, specify whether you are you running in cost-based or rule-based mode.
- The PeopleSoft PeopleTools upgrade path (for example, PeopleSoft PeopleTools 8.53 to 8.54).
- Trace files: PeopleSoft PeopleTools trace and RDBMS-specific trace files, SQL explains, and so on.