

PeopleSoft PeopleTools 8.63

Change Assistant and Update Manager



G47469-01
July 2026



PeopleSoft PeopleTools 8.63 Change Assistant and Update Manager,

G47469-01

Copyright © 1988, 2026, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks	i
Using and Managing the PeopleSoft Online Help	iv
PeopleTools Related Links	iv
Contact Us	iv
Follow Us	v

1 Getting Started with PeopleSoft Change Assistant

PeopleSoft Change Assistant Overview	1
Change Assistant Actions	1
Quick Start	2
PeopleSoft Update Manager (PUM) Enabled Updates	2
Applying Individual PeopleSoft Release Patchset (PRP) to PeopleSoft Update Image	4
Traditional (Non-PUM Enabled) Updates	5
Application Upgrade	5
Other Sources of Information	6

2 Understanding The Environment Management Framework and PeopleSoft Change Assistant

Environment Management Framework	1
Environment Management Hub	1
Agents	2
Viewer	3
EMF Terminology	3
Change Assistant	4
Understanding Change Assistant Versions	5
Maintaining Change Assistant for PUM Enabled Updates	5
Maintaining Change Assistant for Non-PUM Enabled Updates	5
PeopleSoft Update Manager	6
Software Update Process	7
PUM Enabled PeopleSoft Systems	7
Non-PUM Enabled PeopleSoft Systems	9

Software Upgrade Process	9
Source and Target Databases	10
Change Assistant Databases and Terminology	10

3 Configuring and Running Environment Management Components

Configuring the Environment Management Hub	1
Running the Environment Management Hub	2
Running the Hub on a Single Server	2
Running the Hub on Multiple Servers	2
Configuring an Environment Management Agent	4
Configuring Agents With a Secure PS_HOME	7
Running an Environment Management Agent	7
Running an Agent	7
Starting an Agent in the Background on UNIX	11
Starting an Agent With PSEMAgent Windows Service	11
Running the Viewer	13
Configuring and Starting an Environment Management Agent on z/OS	13

4 Configuring Change Assistant

Installing Change Assistant	1
Installing Change Assistant from PeopleSoft Update Image DPK	2
Installing Change Assistant from PeopleTools Client DPK	2
Installing Change Assistant for PUM	3
Installing Change Assistant Using Setup.bat	3
Define Environment Identification	5
Opening Change Assistant the First Time	5
Specifying Change Assistant Options	7
Defining Databases	8
Configuring New Homes for Upgrade	12
Specifying Database Process Scheduler Settings	14
Specifying PeopleSoft Test Framework Settings	15

5 Working With Change Assistant

Understanding The Change Assistant Interface	1
Working With Change Assistant Menu Options	2
Exporting and Importing Change Assistant Settings	7
Exporting Change Assistant Setting in Change Assistant	8
Importing Change Assistant Setting in Change Assistant	10
Migrating PUM Data	14

Using PUM Data Migration Page	16
Working with Change Assistant Templates and Jobs	18
Creating New Template Elements	19
Deleting Template Elements	20
Exporting Templates	20
Exporting Jobs to XML, HTML, or Microsoft Excel Format	21
Working with Steps	21
Setting Step Properties	21
Setting Filter Queries	26
Viewing Step Status	26
Running Multiple Instances of Change Assistant	27
Adding Filter Queries	28
Creating Filter Query Step Type	28
Defining Filter Queries	30
Assigning Filter Query to a Step	32
Cutting and Pasting Filter Queries	34
Creating and Executing Jobs that Include Filter Queries	34
Working with Embedded Documentation	35
Setting the Documentation Directory	35
Viewing the Documentation	36
Creating and Editing Documentation	36
Finalizing Documentation	36
Maintaining Change Assistant Directories	36

6 Running Change Assistant from Command Line

Running Change Assistant Job from the Command Line	1
Update Manager Mode	1
Constructing Command Lines for Configuring Change Assistant	2
Command Line for Uploading Change Assistant Environments that were Previously Exported	2
Command Line for Creating Environment	3
Command Line for Updating Environment	5
Command Line for Setting Options	5
Command Line to Validate EMF Settings	7
Command Line to Upload Target Database	8
Constructing Command Line to Install Languages	8
Constructing Command Lines for Migrating and Uploading Customer Data	9
Command Line to Export Customer Data	9
Command Line to Import Customer Data	10
Command Line to Upload Customer Data	11
Constructing Command Lines to Create and Apply Change Packages	13

Command Line for Defining a Change Package	14
Command Line for Creating Change Package	15
Command Line for Applying PUM Updates	16
Command Line for Applying Downloaded PRP to PeopleSoft Update Image	18
Command Line for Applying PeopleTools Patch	20
Command Line for Applying PeopleTools Upgrade	21
Command Line for Applying Application Upgrade	22
Command Line for Applying Tools Delta Package	24
Command Line for Applying Translation Delta Package	26
Command Line for Applying Required for Upgrade Package	28
Constructing Command Line to Apply Traditional Updates (non-PUM-enabled)	30
Command Line for Non-PUM Enabled Environments	30
Constructing Command Line to View and Delete Merge Sessions	32
View Merge Sessions	32
Delete Merge Session	33
Using a Configuration File with Changeassistant.bat	34

7 Understanding Update Manager Action

Update Manager Action Overview	1
Understanding Update Tools	1
Understanding Update Manager Action	4

8 Setting Up the Client, Source, and Target Environments

Installing PeopleSoft Update Image	1
Configuring the Microsoft Windows Client Running Change Assistant	1
Configuring the Microsoft Windows Client Configuration	3
Understanding the Microsoft Windows Client Configuration	4
Microsoft Windows Client Configuration	5

9 Using Update Manager Action

Selecting Update Manager Action	1
Setting Up Target Environment	1
Starting Change Assistant	2
Configuring Change Assistant for Update Manager	2
Setting General Options	3
Setting PUM Source Options	6
Installing Additional Languages	8
Setting EM Hub Options	9
Setting Additional Options	13

Select Task	14
Validating Change Assistant EMF Settings	17
Defining Target Database	17
PS Home	17
PS App Home	18
PS Cust Home	18
Uploading Target Database Information	18
Defining Change Package	19
Defining a New Change Package in Update Manager Dashboard	20
Defining a New Change Package in Change Assistant	20
Creating Change Package	22

10 Using PUM Automated Updates

Understanding PUM Automated Updates	1
Setting Credentials for Automation	2
Setting Credentials	3
Viewing Notifications	5
Viewing Subscriptions	8
Scheduling Update Jobs	8
Defining Jobs	9
Scheduling Jobs	11
Downloading Application Update Image DPKs	11
Defining Change Package	12
Creating and Applying Change Packages	13
Viewing Job History	14
Viewing Job Monitor	15
Resuming a Job	16
Viewing Download Repository	17
Viewing Maintenance Levels of Non-Source Environment	18

11 Using Update Manager Dashboard

Update Manager Dashboard Overview	1
About PeopleSoft Image	2
Using PeopleSoft Update Manager (PUM) Analytics	3
Reviewing Bugs and Enhancements Using the Pivot Grid	4
Creating a Change Package From the Pivot Grid	5
Database Bug Status	6
Bugs by Product	7
Database Bugs by Tags	8
Bugs by Image	9

Enhancements by Image	9
Enhancements by Product	10
Enhancements by Minimum Tools	11
Applied Bugs by Lag Image	11
Bugs by Language	12
Bugs By Image Applied From	12
Bugs By Dependency	13
Customization Impacts By Bug	13
Defining Change Packages	13
Using Change Package Utilities	14
Reviewing Change Package	14
Deleting Change Packages	19
Merging Change Packages	20
Analyzing Applied PRP(s)	21

12 Managing Customization Repository

Understanding Customization Repository	1
Creating Customization Repository	1
Uploading Customer Data to Image	2
Using Customization Repository	8
Managing Customizations	8
Manage Repository Objects	12
Run Customization Calculation	14

13 Using Administer Metadata

Defining and Managing Databases Using Update Manager	1
Defining Databases with Update Manager	1
Managing Databases	3
Viewing Maintenance Levels of Target Environment	4
Defining and Managing Database Activities	6
Defining Database Activities	6
Managing Database Activities	9

14 Using Usage Repository

Understanding Usage Repository	1
Handling Usage Monitor Data	1
Viewing Usage Monitor Data	2
Running Usage Calculation	3

15	Using PUM Automated Merge	
	Understanding PUM Automated Merge	1
	Enabling PUM Automated Merge	1
	Defining Default Merge Rules	3
	Retaining Object Merge Data and Session	9
	Applying Change Package That Includes Merge-Enabled Objects	12
	Viewing PUM Automated Merge Sessions	13
	Editing Merge Session Rules	17
16	Managing Test Repository	
	Understanding Test Repository	1
	Creating Test Repository	1
	Uploading Tests to PUM Source	2
	Using the Test Repository	5
	Manage Tests	6
	Managing Test Objects	7
	Running Test Coverage Report	9
17	Setting Up Lifecycle Management Insights	
	Understanding Lifecycle Management Insights	1
	Setting Up LCM Insights	1
	Step1: Creating and Consolidating Metadata for Setting Up LCM Insights	1
	Step2: Preprocessing Metadata for Setting Up LCM Insights	5
	Deploying Insights Dashboards	12
	Reviewing LCM Insights	14
18	Working with Customization Groups	
	Understanding Customization Groups	1
	Using Manage Group Settings Page	1
	Using My Customized Objects Page	3
	Filters and Visualizations to Review Customized Objects	3
	Managing Customization Groups from the Actions Menu	10
	Using Manage Groups Page	11
	Working with My Customization Groups Dashboard	14
19	Using Customization Insights	
	Understanding Customization Insights	1

20 Defining Change Packages

Understanding Change Packages	1
Defining Update Change Packages	1
Define Update Package Wizard Step 1 of 6	2
Define Update Package Wizard Step 2 of 6	3
Define Update Package Wizard Step 3 of 6	5
Selecting Standard System Search	5
Selecting Previously Defined Search Criteria	6
Selecting All Other Search Criteria	7
Selecting Specific Bugs	8
Selecting Updates by Prod/Severity/Image	10
Selecting Specific Objects	12
Selecting True Post Requisites	13
Selecting Tax Updates	14
Selecting New Features	15
Selecting Other Criteria	16
Using Advanced Options Page	16
Using the Selection Grid	17
Define Update Package Wizard Step 5 of 6	18
Define Update Package Wizard Step 6 of 6	21

21 Applying Custom Change Packages

Packaging Updates	1
Applying Change Package	2
Understanding the Apply Update Process	2
Applying the Change Package	3
Reviewing the Change Assistant Job	8
Understanding Job Naming Conventions	8
Understanding Job Filtering	9
Running Change Assistant Job	10
Updating Package for Subsequent Passes	10
Moving to Production	11

22 Applying PeopleSoft Release Patchset to PeopleSoft Update Image

Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image	1
Discovering and Downloading the PRP	2
Applying the PRP to the PeopleSoft Image	2

23 Applying PeopleTools Patch

Using Change Assistant to Apply PeopleTools Patch	1
Understanding PeopleTools Patch	1
Locating and Downloading PeopleTools Patch	1
Installing the Patch	2
Installing a New PeopleTools Patch Version of Change Assistant	2
Configuring Change Assistant for Applying a PeopleTools Patch	2
Applying the PeopleTools Patch Change Package	2

24 Upgrading PeopleTools

Using Change Assistant to Upgrade PeopleTools	1
Understanding PeopleTools Upgrade	1
Configuring Change Assistant for PeopleTools Upgrade	2
Configuring Change Assistant for Update Manager – Upgrade to a New Release of PeopleTools	3
Upgrading to a New Release of PeopleTools	9
Creating and Applying Tools Delta Package	12
Defining the PUM Source and EM Hub	13
Creating the Tools Delta Package	14
Applying Tools Delta Change Package	15

25 Defining and Applying Translations Fixes

Understanding Translation Fix Packs	1
Defining Translations Delta Package	1
Define Translations Delta Package Wizard Step 2 of 6	2
Define Translations Delta Package Wizard Step 3 of 6	2
Define Translations Delta Package Step 5 of 6	3
Define Translations Delta Package Wizard Step 6 of 6	4
Creating Translations Delta Package	4
Applying Translations Delta Package	5

26 Using Apply Update Action

Discovering Updates Using My Oracle Support	1
Downloading Updates From My Oracle Support	1
Downloading a Single Patch	1
Downloading Multiple Patches From My Oracle Support	1
Using WGET Options	1

Reviewing the Updates Change Log	2
Configuring Change Assistant for Apply Updates Action	3
Selecting Apply Updates Action	3
Validating Change Assistant Settings	7
Working with Templates	8
Setting the Documentation Directory	9
Applying Updates To A Target Environment	10
Apply Without Compare	12
Apply With Compare or Copy	15
Automatically Deploying Files to Different Servers	16
Resuming Running Jobs	16

27 Working with Change Packages (Traditional Update Only)

Understanding Change Packages	1
Creating a Change Project	1
Setting Project Properties for a Change Package	2
Defining the File Type Code	2
Creating a File Reference Definition	3
Modifying the Upgrade Definition Type	5
Creating Change Packages	5
Creating a Change Package	6
Modifying the Change Assistant Template	8
Finalizing a Change Package	8
Working With Change Package Automation	8
Understanding Change Package Automation	9
Working with ReleaseAdaptor	9
Working With ProjectFilter	9
Working With ProjectInspector	10

28 Getting Started with Software Upgrades

Understanding Change Assistant For Upgrades	1
Databases Used for Application Upgrade	1
Getting Started	2

29 Configuring Change Assistant for Upgrades

Defining an Upgrade Package	1
Selecting the Target Database	1
Define Upgrade Package Step 2 of 6	2
Define Upgrade Package Step 3 of 6	2

Define Upgrade Package Step 5 of 6	3
Define Upgrade Package Step 6 of 6	4
Creating Upgrade Package	4
Configuring Change Assistant for Upgrade Application	5
Setting Change Assistant Options	6
Upgrading Application	8
Change Package Settings	9
Select Upgrade Target Database	10
Select Upgrade Source Database	11
Select Application Upgrade	12
Validation Page	13

30 Running Upgrade Jobs with Change Assistant

Running the Upgrade Job	1
Viewing Upgrade Logs	3
Reviewing Sub-Steps	3
Viewing Scripts	4
Modifying Job Properties	5
Running Process Scheduler Steps	5
Determining When to Run Process Scheduler Steps	5
Preparing to Run Process Scheduler Steps	5
Working With Process Scheduler Steps	6
Ensuring Process Scheduler Security Authentication	6

31 Using Data Conversion Utilities

Understanding Data Conversion Utilities	1
Using the PTIA Data Conversion Process	1
Understanding the PTIA Data Conversion Process	1
Reviewing PTIA Initial Analysis	2
Reviewing Dependency Analysis	13
Reviewing Runtime for PTIADATACONV	15
Reviewing PTIA Reporting	16
Using the Upgrade Driver Program	19
Defining an Upgrade Path	19
Accessing the Define Data Conversion Page	20

32 Working With Scripts

Understanding Process, Scripts, and Syntax	1
--	---

33 Modifying Step Properties and Parameters

Step Types	1
Setting AE With Run Control Options for ADS Compare/Copy	8
Setting Global Payroll Options	9
Setting Search Framework Options for AE With Run Control	11
Setting SQR Report Output Options	13
Step Parameters	13
Variables for All Step Types that Use Path	16
Platform Used in Command Line	17
Consolidating Data Mover Scripts	17

34 Clearing Environment Management Framework Cache

Clearing Environment Management Framework Cache Overview	1
When to Clear Environment Management Framework Cache	1
Clearing EMF Cache	1

35 Troubleshooting Change Assistant and EMF

Peer Cannot Connect to the Hub	1
Error Initializing Agent	3
Distributed Object Manager Errors	3
Cloned Databases Not Being Unique	3
Large SQL Scripts Fail on Microsoft SQL Server	4
Process Scheduler Logs Retrieved Using FTP Losing Formatting	4
Viewing Change Assistant Log Files	4
Errors Found in Log Files	9

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see *Configuring Context-Sensitive Help Using the Hosted Online Help*.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see *Understanding Locally Installed PeopleSoft Online Help*.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The three main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
<u>Key+Key</u>	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For <u>Alt+W</u> , hold down the <u>Alt</u> key while you press the <u>W</u> key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Typographical Convention	Description
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region, Country, and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following are examples of region identifiers that may appear in PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleTools Related Links

[PeopleSoft 8.63 Home Page](#)

[PeopleSoft Search and Insights Home Page](#)

[PeopleSoft Online Help](#)

[PeopleSoft Information Portal](#)

[PeopleSoft Spotlight Series](#)

[PeopleSoft Training and Certification | Oracle University](#)

[My Oracle Support](#)

[Oracle Help Center](#)

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

Follow Us

Icon	Link
	Watch PeopleSoft on YouTube
	Follow @PeopleSoft_Info on X.
	Read PeopleSoft Blogs
	Connect with PeopleSoft on LinkedIn

1

Getting Started with PeopleSoft Change Assistant

PeopleSoft Change Assistant Overview

Oracle's PeopleSoft Change Assistant is a standalone Java program that orchestrates the process of updating or upgrading your PeopleSoft system. Environment Management Framework is used for non-PUM enabled updates and for deploying files with Update Manager.

Change Assistant provides these main benefits:

- Automates many of the steps in an upgrade or update process.
- Provides a clear step-by-step definition of the process for applying maintenance or performing an upgrade. Whether the process is automated or manual, as long as you complete each step, you will successfully apply the application maintenance or perform the upgrade.
- Provides in-line documentation for each of the steps in the process.
- Is integrated with the PUM application and uses the change package definitions created in the PeopleSoft Update Image.

The Environment Management Framework performs these key tasks:

- Crawls local drives and directory paths to discover and validate the components associated with a given PeopleSoft environment.
- Deploys files to various components in the PeopleSoft environment.

Related Topics

- [Environment Management Framework](#)
Environment Management Framework (EMF) is a collection of software elements that gathers and publishes PeopleSoft installation, configuration, and update information. It enables you to identify and view data about PeopleSoft environments. You can use EMF to obtain a snapshot of configuration and setup information about the file servers, the web servers, the application servers, the individual hosts, and the PeopleSoft Process Scheduler servers that comprise your PeopleSoft system. EMF also provides a vehicle to carry out commands remotely on different machines on the network, directed by Change Assistant, which uses EMF to apply updates to PeopleSoft installations and configurations.

Change Assistant Actions

Change Assistant supports the following actions:

Term	Definition
Apply Updates	Any systems that are not Update Manager enabled will use the Apply Updates to apply updates downloaded from My Oracle Support.

Term	Definition
Update Manager	Update Manager contains 4 sets of tasks: • Update Manager Tasks Update Manager is used for application patching and updates for PeopleSoft PUM-enabled applications(all 9.2 applications and Interaction Hub 9.1). This option allows you to select the updates from the PeopleSoft Update Image and create a custom change package that includes only the updates and any calculated requisites you want to apply to your application. • Application Upgrade Tasks Application Upgrade is used to perform an upgrade to 9.2 application release. • PeopleTools Tasks PeopleTools tasks include applying the database changes required with PeopleTools patches, PeopleTools upgrades and PeopleTools delta packages. • Other tasks Other tasks include exporting and importing Change Assistant settings.
View PUM Automated Merge Sessions	If Object Merge is enabled, this action can be used to display the merge session and review how the code was automatically merged based on the merge rules.
Create or Modify Templates	Change Assistant templates are composites of all the possible steps that apply to an update or upgrade. The templates are delivered as part of the change package or upgrade. Once you select a change package or upgrade, the template is loaded into the Change Assistant internal storage. You can edit the template or add additional chapters, tasks and steps, if needed.

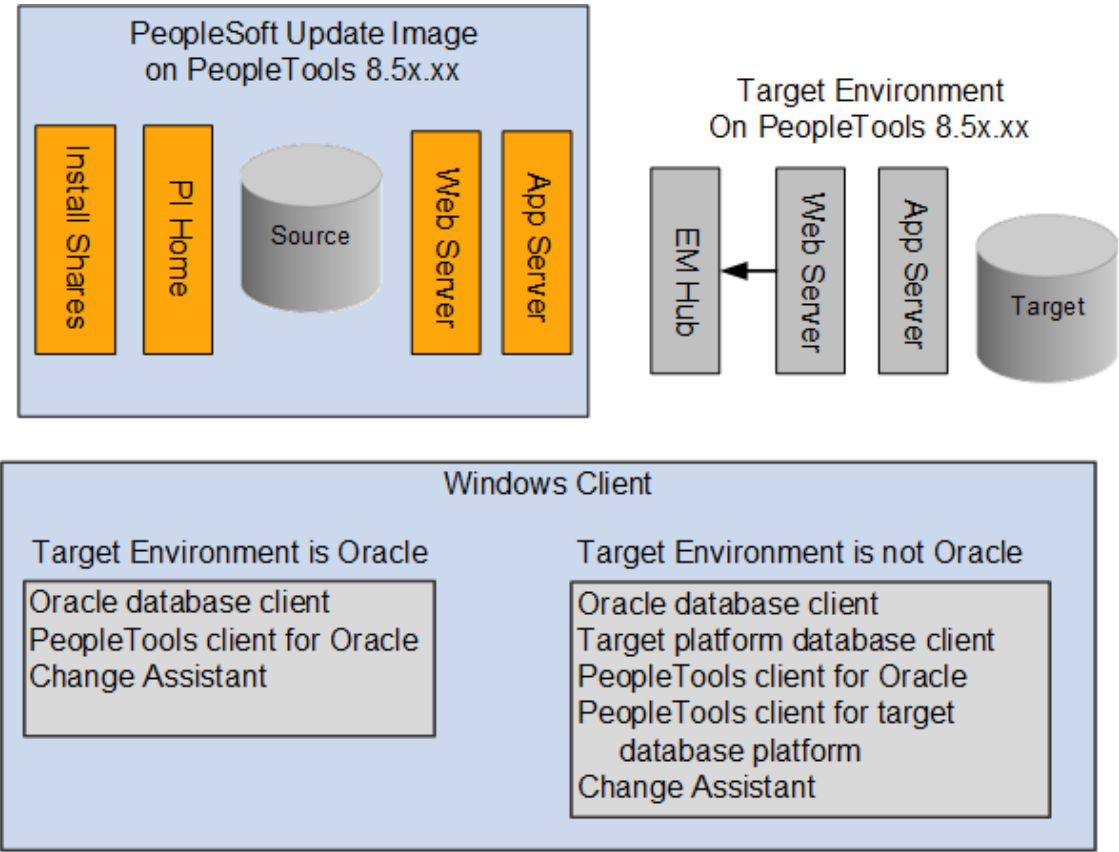
Quick Start

The following items provide a quick start reference for the main steps and concepts related to the implementation and use of Change Assistant. This list is designed to help get you up and running with Change Assistant as well as to help you to understand the main functions for which Change Assistant was designed.

PeopleSoft Update Manager (PUM) Enabled Updates

The steps appear in the logical order that you would perform them, and the links point to the location where the information for a specific task is provided. PUM enabled applications include all 9.2 applications and Interaction Hub 9.1

This diagram illustrates the PUM environment which includes the PeopleSoft Update Image, the target environment and the windows client.



Note

If the target environment is Oracle database on a lower PeopleTools release than the PeopleSoft Update Image, the configuration will be the same as the target on a non-Oracle database.

Step	Reference
1. Use My Oracle Support (MOS) to find the current PeopleSoft Update Image and download it.	See PeopleSoft Update Manager Home Page [ID 1641843.2]
2. Install the PeopleSoft Update Image. Note: The PeopleSoft Update Image may be at a different release/patch level than your target environments.	See <i>PeopleSoft Deployment Packages for Update Images Installation (PeopleSoft PeopleTools 8.5x)</i> .
3. (Optional) Configure and start the PSEMAgent on every server within your PeopleSoft target environment. Note: EMF is only run on the target environments not on the PeopleSoft Update Image. EM Hub is only used for file deploy in PUM-enabled applications.	See Configuring an Environment Management Agent .

Step	Reference
4. Map your Windows client to the PeopleSoft Update Image shared drives. Mapping can be done using the PeopleSoft Update Image IP address. Note: The IP address can be identified using the <code>ifconfig</code> Linux command on the VirtualBox.	See Configuring the Microsoft Windows Client Running Change Assistant
5. Configure Microsoft Windows client running Change Assistant.	See Configuring the Microsoft Windows Client Running Change Assistant
6. Install Change Assistant on Windows client at the same release/patch level as the PeopleSoft Update Image.	See Installing Change Assistant
7. Start Change Assistant. Click Next on Welcome page, then select <i>Update Manager</i> action.	See Selecting Update Manager Action
8. In Change Assistant, select Update Manager > Define Change Package. The Change Assistant Wizard will lead you through the setup pages.	See Defining Change Package
9. Use PeopleSoft Update Manager PIA application in the PeopleSoft Update Image environment to search for updates you need, review the update impact, and define your update change package. Note: Update change packages can also be created in Change Assistant using standard search criteria.	See Defining Update Change Packages
10. Use Change Assistant to create the change package from your custom change package definition created with PeopleSoft Update Manager PIA application, analyze the change impact, and apply the updates.	See Packaging Updates .
11. Use Change Assistant to apply the change package.	See Applying Change Package

Note

Use the PeopleSoft Update Image Home Pages tab from the [PeopleSoft Update Manager Home Page \[ID 1641843.2\]](#) to access the PeopleSoft Update Image for your application. The Update Image Home page for your application will contain links to all the relevant information for the PeopleSoft Update Image you are downloading. The Installation Documentation section on the page contains a link to the installation guide for the Image.

Applying Individual PeopleSoft Release Patchset (PRP) to PeopleSoft Update Image

The steps appear in the logical order that you would perform them, and the links point to the location where the information for a specific item exists within this PeopleBook.

Step	Reference
1. Search MOS for the PRP.	See PeopleSoft Update Manager Home Page [ID 1641843.2]
2. Download the PRP to a local directory.	See Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image
3. Apply the PRP to the PeopleSoft Update Image using Update Manager action Apply Downloaded Individual Posting to PeopleSoft Update Image.	See Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image
4. Use the Update Manager process to search for and apply the new individual fix to your target databases.	See PeopleSoft Update Manager (PUM) Enabled Updates

Traditional (Non-PUM Enabled) Updates

The steps appear in the logical order that you would perform them, and the links point to the location where the information for a specific item exists within this PeopleBook.

Step	Reference
1. Configure and start the PSEMHUB within your PeopleSoft environment.	See Configuring the Environment Management Hub .
2. Configure and start the PSEMAgent on every server within your PeopleSoft environment.	See Configuring an Environment Management Agent .
3. Install and configure Change Assistant, specifying the proper directories for file download and storage, and ensuring it can connect to the PSEMHUB.	See Installing Change Assistant .
4. Use My Oracle Support (MOS) to identify the bundles and updates that need to be applied to your specific environment.	See Discovering Updates Using My Oracle Support .
5. Download the required bundles and updates.	See Downloading Updates From My Oracle Support .
6. Use Change Assistant to apply the bundles and updates.	See Applying Updates To A Target Environment .

Application Upgrade

Application Upgrade is only used to upgrade from a previous application release to application release 9.2. The steps appear in the logical order that you would perform them, and the links point to the location where the information for a specific item exists within this PeopleBook.

Step	Reference
1. Install new PeopleTools release, if necessary.	See <i>PeopleSoft PeopleTools 8.5x Deployment Packages Installation</i>

Step	Reference
2. Use My Oracle Support (MOS) to find the current PeopleSoft Upgrade Source Image and download it. Note: Or install the Demo database for the Upgrade Certified new release from the media pack or CD, available on Oracle Software Delivery Cloud (classic method).	See PeopleSoft Upgrade Source Image Home Page (ID: 1552580.1) .
3. Install the PeopleSoft Upgrade Source Image. Note: The PeopleSoft Upgrade Source Image may be at a different release/patch level than your target environments.	See <i>PeopleSoft Deployment Packages Installation (PeopleSoft PeopleTools 8.5x)</i> .
4. Use My Oracle Support (MOS) to find the current PeopleSoft Update Image and download it.	See PeopleSoft Update Manager Home Page [ID 1641843.2]
5. Install the PeopleSoft Update Image. Note: The PeopleSoft Update Image may be at a different release/patch level than your target environments.	See <i>PeopleSoft Deployment Packages for Update Images Installation (PeopleSoft PeopleTools 8.5x)</i> .
6. Create an upgrade change package.	See Defining an Upgrade Package
7. Upgrade to new application release.	See Upgrading Application

Other Sources of Information

This section provides information to consider before you begin to use PeopleSoft Change Assistant. In addition to implementation considerations presented in this section, take advantage of all PeopleSoft sources of information, including the installation guides, release notes, PeopleBooks, and training courses and your PeopleSoft application upgrade documentation.

Related Topics

- Application Designer Developer's Guide
- Lifecycle Management Guide
- Change Impact Analyzer

2

Understanding The Environment Management Framework and PeopleSoft Change Assistant

Environment Management Framework

Environment Management Framework (EMF) is a collection of software elements that gathers and publishes PeopleSoft installation, configuration, and update information. It enables you to identify and view data about PeopleSoft environments. You can use EMF to obtain a snapshot of configuration and setup information about the file servers, the web servers, the application servers, the individual hosts, and the PeopleSoft Process Scheduler servers that comprise your PeopleSoft system. EMF also provides a vehicle to carry out commands remotely on different machines on the network, directed by Change Assistant, which uses EMF to apply updates to PeopleSoft installations and configurations.

EMF is used with Change Assistant to deploy files contained in an upgrade package. For traditional updates (non-PUM enabled applications), EMF is required to identify PeopleSoft environments, for all other Change Assistant actions configuring and running EMF is optional.

EMF consists of the following core elements:

- The Environment Management hub (PSEMHUB)
- Environment Management Agent (PSEMAgent)
- The Environment Management viewer

Environment Management Hub

The Environment Management hub is a web application that is installed with the PeopleSoft Internet Architecture and portal. It is started along with the rest of the web applications when the user boots the web server. The hub is the broker for all communication between peers.

The Environment Management hub handles:

- Peer registration.

The hub registers all of the information that is published by the agents. It also assigns a unique peer ID for every peer that engages in a dialogue with the hub.

- Maintenance of configuration information.

The hub handles updates to configuration information, the correlation of information, and the grouping into environments based on the information that is published by the agents.

- Agent health monitoring.

The hub keeps track of the state or "health" information of the managed components. It shows whether a peer is still running remotely or not.

- Message brokering.

The hub services message service requests and responses from peers. The messages can be delivered to the respective peers even if the peers are not currently running. They

are picked up the next time the peers “call in” to the hub. Typical messages include requests to deploy files to managed servers. It's recommended that the managed server agents be left up and running at all times to listen for messages from the hub. This is critical when applying software updates.

The Environment Management hub is installed as part of the standard PeopleSoft Internet Architecture installation. It supports both single-server and multi-server installations. The Environment Management hub is deployed in the J2EE containers as web application modules. They can be managed like any of the standard web application modules.

Environment Management hub directories are created on the J2EE container for the hub. For Oracle WebLogic, the directory is
`PIA_HOME\webserv\domain\applications\peoplesoft\PSEMHUB`

The required JAR files for the Environment Management hub are installed in the `WEB-INF\lib` subdirectory.

Agents

An Environment Management agent is a Java executable installed on the servers in a PeopleSoft environment, such as application servers, Process Scheduler servers, web servers, and so on. The Environment Management agent initiates communication with the hub and is assigned a unique peer ID. This ID persists and is reused for later connections by the agent.

The primary function of the agent is crawling the managed servers to identify manageable components. The metadata of the search results of the crawling are saved to the local hard disk. On startup, if the agent detects missing metadata, it recrawls the hard disk for manageable components. You can configure the drives and directory paths used for crawling.

The agent also publishes managed server information to the hub. After detecting a manageable component, the agent reads the non-sensitive information from configuration files of the component. Some relevant information that is related to environment and patch levels is also fetched from the database with which the application server or Process Scheduler communicates. The agent publishes this information to the hub upon initial connection and upon a recrawl or revalidate.

The agent also determines heartbeat and command execution. On every heartbeat, the agent pings the server to determine whether it has any pending messages. If there are pending messages for the agent, the messages are retrieved from the hub and carried out locally on the agent machine.

Note

The Environment Management agent is installed in the `PSEMAgent` directory in `PS_HOME` when you deploy PeopleTools.

Note

Multiple EM Agents can be run, but they must be run using a different agentport.

See *PeopleTools installation* documentation for your database platform.

Viewer

The Environment Management viewer is a command-line tool enabling you to view data stored on the Environment Management hub. This data is saved in an XML file that contains data that is specific to individual customer sites—such as, information about environments, software updates, hosts, file servers, application servers, PeopleSoft Process Scheduler servers, and web servers. Users can view this static data in HTML.

The Environment Management viewer may only be executed on PeopleSoft web servers, from its installed location in *PS_HOME\PSEMViewer*. You don't have to carry out any additional installation steps to install the viewer.

EMF Terminology

The following terms relate to Environment Management:

Term	Definition
Manageable component	A component that can be individually managed from the Environment Management hub. A manageable component for PeopleSoft is typically a file server, an application server, a web server, individual hosts, or a PeopleSoft Process Scheduler server.
Peer	A manageable component that is involved in a transaction with one or more peers in the Environment Management by using the hub as the intermediary. A peer may also be responsible for delegation of management responsibility to a collection of manageable components. Examples of peers are agents, Change Assistant, and the Environment Management viewer.
Heartbeat	“I am alive messages” sent by every peer to the hub. The default interval is configurable. On every heartbeat, the peer pings the server to see if it has any pending messages. If it does, the messages are taken and carried out.
Environment	All of the manageable components in the enterprise that share the same globally unique identifier (GUID) in the database. There can be more than one instances of a type of managed component in an environment. For example, development environments can contain several application servers, Process Schedulers, and web servers.
GUID	Uniquely identifies a particular PeopleSoft system. PeopleSoft assigns a unique value, referred to as a GUID, to each PeopleSoft application installation. This value can't be customized. When an Environment Management agent notifies the hub that it has found a manageable component belonging to an environment, if the GUID of the environment is not recognized, the hub creates a new environment representation.

Term	Definition
Crawling	The process of scanning the hard disk for known PeopleSoft patterns for manageable components. The hub has a set of configurable parameters by which the recrawl intervals can be altered. Based on this, the hub can issue a recrawl command to the agents to discover information about newly installed or changed configurations. Note: During crawling, the Environment Management Framework uses the psserver property in the peopletools.properties file within each PS_HOME installation to determine the type of server(s) installed. For example, APP is application server, BATCH is Process Scheduler, DB is database server, WEB is web server, and FILE is file server. Note: Recrawling includes revalidating.
Revalidate	The process of checking whether the last set of managed components that have been discovered is still valid. The agent iterates through the list of components that have been discovered from the last recrawl. It then checks whether the current set of configuration parameters for the managed components have changed the management scope for the component. If so, the information is updated. If the new set of configuration options has made the component not usable, it is removed from the list of managed components. This information is updated in the hub the next time the agent communicates with the hub.

Change Assistant

Change Assistant is a standalone application that enables you to assemble and organize the steps necessary to apply updates and fixes for PeopleSoft application maintenance updates as well as performing upgrades. Change Assistant automates many of the steps, but will prompt you and guide you through any manual steps with embedded documentation.

You use Change Assistant for these situations:

- Selecting and applying updates related to PeopleSoft application maintenance. Change packages are automatically created based on the customers selection of the updates to apply.
- Performing upgrades, which includes PeopleTools-only upgrades and PeopleSoft application-only upgrades.
- Applying database changes for PeopleTools patches.

Note

You use Change Assistant to apply updates that have a .ZIP extension. You *do not* use Change Assistant to apply updates that have an .EXE extension.

You can use PeopleSoft Update Manager for select applications releases to search for updates you may need for your environment and to review the potential impact of the selected changes. PeopleSoft Update Manager will automatically include requisite updates based on the items you select; it will show you what has already been applied to your target environment; and, it will let you review the changes included with each update before selecting it. You can then create a custom change package definition with your selected updates.

! Important

The change package definition created only guarantees the requisites for the specific target selected. If the same change package is applied to a different target, you may encounter errors or warnings if the environment is not at the same level as the target specified when the package definition was created.

Understanding Change Assistant Versions

You can use a newer version of Change Assistant than the version of PeopleTools you are using. However, the environment management agents and hub should be at the same release level as Change Assistant.

For PUM , your PeopleTools version for target database could be at 8.54.03, but you can run Change Assistant at the 8.57.03 level, in this case the environment management hub and agents would run on 8.54.03.

For non-PUM enabled environments, the environment management agents and hub must be at the same release/patch level as Change Assistant, in order to apply updates. For example, your PeopleTools version could be at 8.53.09, but you can run Change Assistant at the 8.53.14 level as long as the agents and hub are also at the 8.53.14 level.

Maintaining Change Assistant for PUM Enabled Updates

When you install a new PUM Source, you will need to install the new Change Assistant version for that PUM image. Change Assistant is installed from the tools_client directory using SetupPTClient.bat.

See [Configuring the Microsoft Windows Client Running Change Assistant](#)

Maintaining Change Assistant for Non-PUM Enabled Updates

Periodically, Oracle provides patches for PeopleTools that supply fixes to critical defects. With each PeopleTools patch version, Oracle provides the following updates in executable format:

Executable	Description
version.exe For example, 85014.exe	Contains all current fixes to the entire PeopleTools product, including those fixes to the software update technology, which includes Change Assistant and all environment management elements (agents, hub, and so on).

Executable	Description
version-PSCA.exe For example, 85014-PSCA.exe	Contains <i>only</i> the current fixes for Change Assistant and all environment management elements (agents, hub, and so on). The software update technology runs independently from the rest of PeopleTools. Important: This only applies to non-PUM enabled applications.

Note

If you install a complete PeopleTools patch, you do not need to apply the -PSCA patch individually. Apply the -PSCA patch individually only if you are running non-PUM enabled applications and interested in just the fixes for the software update tools and not the fixes for the entire PeopleTools product.

The -PSCA patch enables you to apply only the latest fixes to Change Assistant and the environment management framework without applying the latest full PeopleTools patch. By doing so, you can avoid the regression testing that typically occurs after applying a full PeopleTools patch.

PeopleSoft Update Manager

PeopleSoft Update Manager (PUM) is a tool which runs on the PeopleSoft Update Image database.

PeopleSoft Update Images (PI) are fully functioning instances of the PeopleSoft environment. There is one PeopleSoft Update Image per product family (database instance) and they will be released periodically according to the image schedule posted on the PeopleSoft Update Manager Home Page. The PeopleSoft Update Image is the master source environment from which you will pull the updated objects, create a custom change package, and apply updates to your environment. The PeopleSoft Update Image for your application is cumulative so you will download the most current PeopleSoft Update Image and get all of the updates that you need.

There are two types of downloads for your PeopleSoft Update Image:

- **VirtualBox:** Use this download to deploy the PeopleSoft Update Image using a VirtualBox Virtual Machine. This is similar to the installation process used with images using PeopleTools 8.53 and 8.54.
- **NativeOS:** This download is for Linux and Windows customers. This download allows you to apply your PeopleSoft Update Image directly to your OS or a virtualization platform without having to use VirtualBox.

The PeopleSoft Update Manager PIA Application and the PeopleSoft Update Image work together; the PeopleSoft Update Image contains the updates and the PeopleSoft Update Manager PIA Application is the searching tool and custom change package definition generator. PeopleSoft Change Assistant orchestrates the entire process flow. Change Assistant is the tool used to analyze and compare changes, to apply the changed objects to your environment, to add in your customizations, and to generate custom change packages.

Software Update Process

The software *update* process refers to applying updates to your PeopleSoft application. The procedure for applying updates depends on whether the PeopleSoft application is PUM enabled.

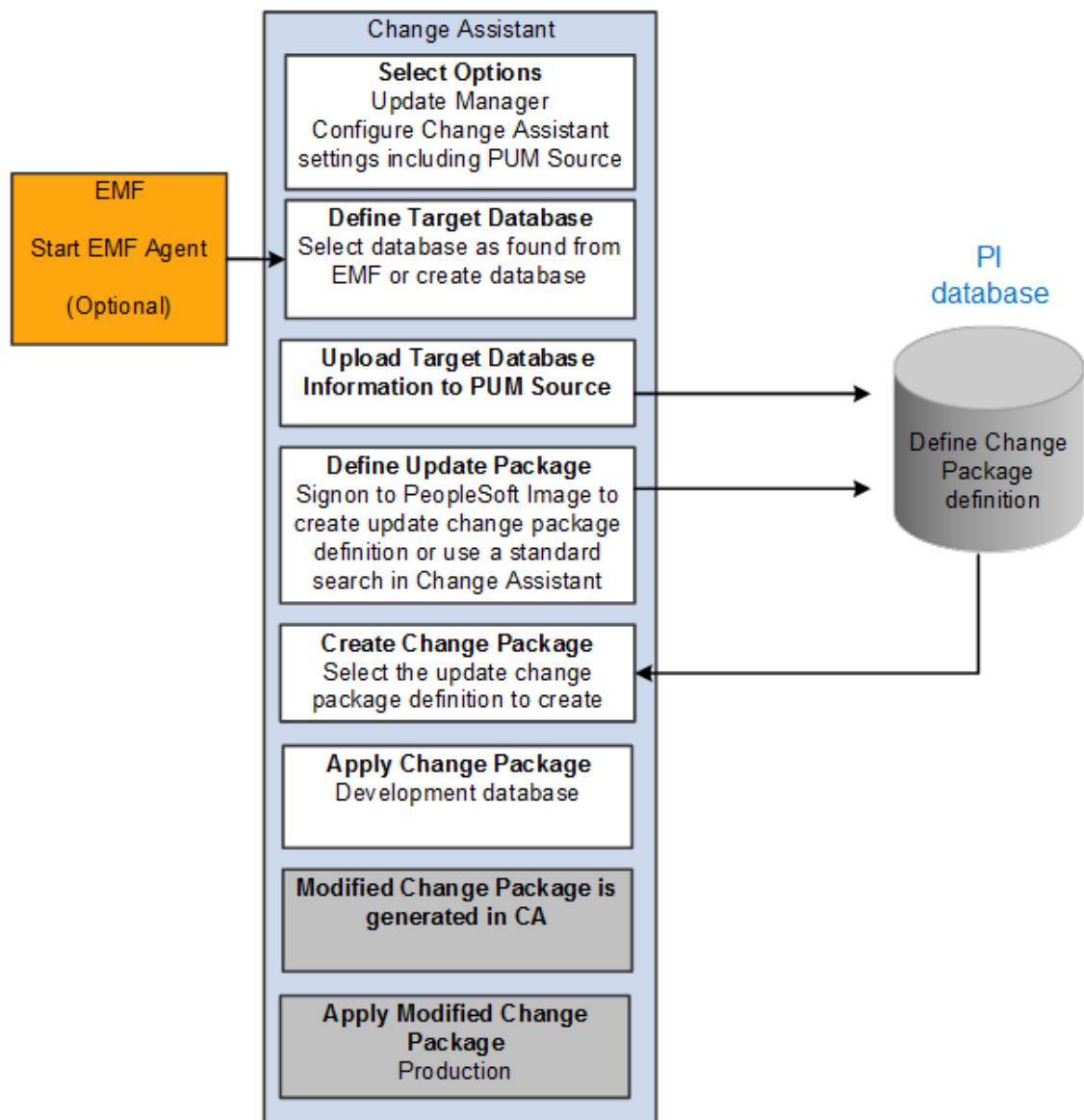
PUM Enabled PeopleSoft Systems

All PeopleSoft updates for a product family are made available on a PeopleSoft Update Image. The PeopleSoft Update Image contains the very latest PeopleSoft working database, applications, managed objects, codeline, and the data and metadata required to use the PeopleSoft Update Manager. The PeopleSoft Update Image is posted and downloaded from My Oracle Support (MOS). The schedule for images will be posted in advance on MOS for each PeopleSoft application database instance.

Software update tools include:

- Environment Management Framework
Used to collect environment information.
See [Running the Environment Management Hub](#)
- Change Assistant
Used to upload target database information to the PeopleSoft Update Image, create change packages from the change package definitions created using PeopleSoft Update Manager, and to the apply change packages to target databases.
See [Applying Updates To A Target Environment](#)
- PeopleSoft Update Manager PIA Application
The Update Manager Dashboard provides a central location for all update tasks including:
 - PUM Analytics
 - Defining Change Packages
Wizards are used to search for updates and create custom change package definitions.
 - Change Package Utilities
 - Maintaining Test RepositorySee [Update Manager Dashboard Overview](#)
- Change Packager
Creates the change package in Change Assistant based on the change package definition created in PUM.

This diagram illustrates the Software Update process steps for the initial pass.



Steps Used in Software Update Process

This table lists the steps used to search for and apply updates to your development or target database.

Step	Description
1	Download and install the latest PeopleSoft Update Image from MOS.
2	Configure your windows client to access the PeopleSoft Update Image (PI) database.
3	(Optional)Install and configure EMF on the target environment.
4	Install Change Assistant on the windows client.
5	(Optional) Start EMF Agent.
6	Start Change Assistant and configure for Update Manager. This includes defining the PUM Source. Note: Update Manager action.

Step	Description
7	In Change Assistant, Select Tools, Upload Target Database Information to PUM Source.
8	In Change Assistant, Select Tools, Define Change Package to create a change package. From this option, you can either: - Sign on to the PeopleSoft Update Image and use PUM PIA application to search for desired updates, review potential update impacts and changes, and generate your update change package definition. - Create a change package in Change Assistant based on available search criteria.
9	In Change Assistant, Select Tools, Create Change Package to create the change package based on the change package definition defined in step 8.
10	In Change Assistant, Select Tools, Apply Change Packages to create the change package and apply it to your target database. Use the <i>Initial Pass</i> option to identify your customizations and adjust the project accordingly. Reapply any customizations as necessary.
11	As part of the initial pass process, Change Assistant will create a new change package with all of your customizations that can be applied to your other environments, using the <i>Subsequent Pass</i> or <i>Move to Production Pass</i> option.

Non-PUM Enabled PeopleSoft Systems

This software update process is only used for PeopleSoft systems that are not PeopleSoft Update Manager enabled. For PUM enabled systems refer to the previous section.

This software *update* process refers to applying change packages, bundles, and maintenance packs to your non-PUM enabled PeopleSoft application. For example, PeopleSoft application development teams periodically post change packages containing fixes to various application elements, such as pages and PeopleCode programs, that you can download and apply to your PeopleSoft system. You use Change Assistant to apply software updates.

Step	Description
1	Install and configure Change Assistant and the Environment Management components.
2	Use My Oracle Support (MOS) to search for updates.
3	Download the Change Packages from MOS.
4	After you have downloaded the change packages, you can then apply them in a batch or individually. If prerequisites or post-requisites are required, they will be included in the list as well.

Software Upgrade Process

Selective adoption process for application maintenance was introduced with PeopleSoft 9.2. The last application upgrade needed for your database will be to upgrade the application to 9.2. The software *upgrade* process involves installing a new version of PeopleTools and a new version of an existing PeopleSoft application.

This process uses Change Assistant, and the Environment Management Framework when running remote upgrade processes. If you are upgrading to PeopleSoft 9.2 consult your specific application's install and upgrade documentation.

Source and Target Databases

In various places within this PeopleBook, as well as any PeopleSoft documentation related to upgrades or database compares, the terms *source* and *target* are used. Knowing the meanings of these terms helps you to understand the context of a description or step.

During a PeopleSoft update or upgrade, in most cases, you copy application definitions (such as pages and records) from a *source* database to a *target* database. The definitions of these terms are:

Term	Definition
Source database	The source database is the database <i>from which</i> the new changes are coming.
Target database	The target database is the database <i>to which</i> you are moving the new changes.

Note

Depending on whether you are performing an upgrade or update, and the stage within the process you are, these terms are relative and can refer to different databases.

Change Assistant Databases and Terminology

The database definition will include:

- Database name
- Database type
- User Ids and passwords
- SQL query executable
- SQR Settings
- Products
 - Change Assistant will query the database for the products.
- Languages
 - Change Assistant will query the database for the languages.
- Paths to the current home directories.
 - PS_HOME
 - PS_APP_HOME
 - PS_CUST_HOME
- For upgrades, the database will also include paths to the new home directories.

Paths to Home Directories

The order by which the PeopleTools runtime will pick up objects from the file system is as follows:

1. PS_CUST_HOME
2. PS_APP_HOME
3. PS_HOME

Change Assistant will loop through the paths in order of precedence until it finds the first instance of the file object at which time it will execute the step.

Databases Used for Each Action

Action	Databases and Paths Used
Apply Update	Target database with path for current environment.
Update Manager	Target database with path for current environment. Source database (PeopleSoft Update Image) with path for current environment.
Application Upgrade	PeopleSoft Update Image with path for current environment. Certified Upgrade Source Image with path for current environment. Copy of Production with path for current environment and new PS homes. Production database with path for current environment and new PS homes.
Upgrade PeopleTools	Target database with path for current environment and a path for the new PeopleTools home.

3

Configuring and Running Environment Management Components

Configuring the Environment Management Hub

Before you can run the Environment Management hub, you must ensure that it's properly configured.

The hub issues automatic recrawl and revalidate commands to the agents, and it can be configured to accept automatic updates from Change Assistant. You configure the hub by setting appropriate parameters in its configuration file, which is located in *PIA_HOME\webserv\domain\applications\peoplesoft\PSEMHUB\envmetadata\config\configuration.properties*.

The following table describes the primary configuration.properties parameters for the hub:

Configuration Parameter	Description	Default Value
recrawlinterval	The interval, in hours, between two successive recrawl commands that have been issued to a peer. The server issues recrawl commands only to agents that are connected to the hub and have no pending messages in the queue. This configuration parameter is ignored by the agent.	24 hours Note: A 0 value means that it will not recrawl. Recrawling includes a revalidating.
revalidateinterval	The maximum time, in hours, between two successive automatic revalidates that the hub issues.	6 hours Note: A 0 value means that it will not revalidate.

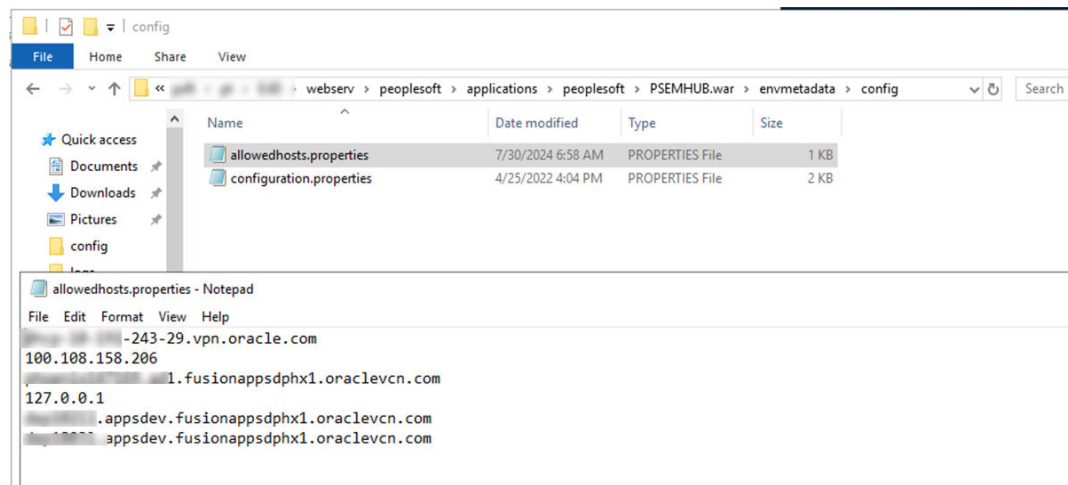
Hub Security Considerations

Environment Management framework supports HTTP and HTTPS connection.

If the EM Hub server uses the connection type HTTP or one-way SSL, then the client hostname or IP address need to be added to the allowedhost.properties file so that the client host is allowed to make a connection request.

The allowedhost.properties file is available in */webserv/peoplesoft/applications/peoplesoft/PSEMHUB.war/envmetadata/config/*.

This example illustrates the sample allowedhost.properties file.



Note that the local host IP 127.0.0.1 is added by default to enable local PSEMAgent to ping EM Hub running on the same server. You can remove this IP if not required.

In the application log file, you will find logs that shows rejected connection requests from clients that are not added in the allowedhost.properties file. Use the information in the log file to resolve the connection issue.

Keystores and Truststores

A Keystore consists of a database containing a private key and an associated certificate, or an associated certificate chain. The certificate chain consists of the client certificate and one or more certification authority (CA) certificates.

A Truststore contains only the certificates trusted by the client (a “trust” store). These certificates are CA root certificates, that is, self-signed certificates.

For details on configuring keystore and truststore, refer System and Server Administration: Implementing WebLogic SSL Keys and Certificates.

For details on generating encrypted passwords, refer Security Administration: Generating a Unique Encryption Key

Running the Environment Management Hub

Before you run the Environment Management agent, you must first ensure that it's properly configured in the hub's configuration.properties file.

Running the Hub on a Single Server

On a single server, the PSEMHUB starts within PIA, so use the command you use for your web server to start PIA.

Running the Hub on Multiple Servers

Environment Management also supports multi-server installs. However, the Environment Management hub does not support clustering. The Environment Management hub persists metadata into the file system on the J2EE container. This is not replicated in a clustered

environment. You experience erroneous behavior when you attempt to run the Environment Management hub in a clustered environment.

The Environment Management hub deals with large binary files that Change Assistant sends to the agents by using the hub as the intermediary dispatcher. This can create significant overhead to a production system that is running on a multi-server clustered environment. Therefore, PSEMHUB must always run on separate servers dedicated to the Environment Management hub requests.

Starting PSEMHUB on Multiple Servers on WebLogic

In a multiple server configuration, the PSEMHUB server listens on port 8081, by default.

Use the following steps to start the WebLogic hub:

1. Configure the Environment Management hub to run on a server that is different from the PeopleSoft Internet Architecture servers.
2. Configure the reverse proxy to redirect any network traffic with a uniform resource identifier (URI) of PSEMHUB to the server running the Environment Management hub.

On the machine from which the RPS application runs, access the `HttpProxyServlet` folder.

Select `PSEMHUBHttpProxyServlet` and click the `Init Params` tab. Replace `WebLogicHost`, `WebLogicPort` with the host and port from which your PSEMHUB server listens.

Note

Save your new configuration.

Use the following commands in sequence to start the Environment Management hub in a multi-server installation:

```
...\StartWebLogicAdmin.cmd (start the admin server)
...\StartManagedWebLogic.cmd RPS
...\StartManagedWebLogic.cmd PSEMHUB
```

Then use the following URL to access PSEMHUB: `http://RPS host:RPS port/PSEMHUB/hub`.

Note

For a single server install using a reverse proxy, this additional step needs to be performed in order for the Environment Management hub to be able to process the PSEMHUB requests. You need to edit: `PIA_HOME\webserv\domain\applications\HttpProxyServlet\WEB-INF\web.xml`. In the `PSEMHUBHttpProxyServlet` section, change the default port from 8001 to 80.

The following is a sample configuration:

```
- <servlet>
  <servlet-name>PSEMHUBHttpProxyServlet</servlet-name>
  <servlet-class>weblogic.servlet.proxy.HttpProxyServlet</servlet-class>
- <init-param>
  <param-name>WebLogicHost</param-name>
```

```

    <param-value>localhost</param-value>
  </init-param>
- <init-param>
  <param-name>WebLogicPort</param-name>
  <param-value>80</param-value>
</init-param>
</servlet>

```

Stopping the PSEMHUB on Multiple Servers on WebLogic

In a multiple server environment, target the server which is dedicated to PSEMHUB then execute `PIA_HOME\webserv\domain\stopWebLogic.cmd` PSEMHUB on Windows and `PS_HOME\webserv\domain\stopWebLogic.sh` PSEMHUB on UNIX. This will only stop the server servicing PSEMHUB requests. The other servers will still be up processing PIA requests.

The following is a sample XML configuration file for the WebLogic multi-server installation:

1.1 Sample XML configuration file for WebLogic Multiserver installation

```

<UriGroup Name="default_host_server1_st-lnx06_Cluster_URIs">
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/*" />
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSIGW/*" />
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSINTERLINKS/*" />
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSOL/*" />
</UriGroup>
- <UriGroup Name="default_host_server1_pt-lnx03_Cluster_URIs">
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/*" />
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSIGW/*" />
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSINTERLINKS/*" />
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSOL/*" />
</UriGroup>
- <UriGroup Name="default_host_server1_pt-ibm15_Cluster_URIs">
  <Uri AffinityCookie="JSESSIONID" AffinityURLIdentifier="jsessionid"
Name="/PSEMHUB/*" />
</UriGroup>

```

Configuring an Environment Management Agent

Before you can run an environment management agent, you must ensure that it's properly configured. You configure the agent by making appropriate entries in its `configuration.properties` file, which is located under:

`PS_HOME\PSEMAgent\envmetadata\config`

The following table describes the `configuration.properties` parameters for the Environment Management agent:

Configuration Parameter	Description	Default Value
hubURL	The URL that contains the host name and the port number of the machine on which the Environment Management hub is running (inside a J2EE container).	http://hostname:port/PSEMHUB/hub.
agentport	A port that the agent uses for internal life cycle management.	5283.
pinginterval	The interval, in milliseconds, between two successive attempts that the peer makes to contact the hub. All peers that access this configuration file have the same ping interval.	10000 (in milliseconds for the heartbeat). Note: The minimum required pinginterval value is 1000.
windowsdrivestocrawl	On Microsoft Windows, the set of local drives or directory paths where PS_HOME, PS_CFG_HOME, PS_APP_HOME, and PIA_HOME are located. Separate the drive letters or directory paths with spaces and a pipe symbol ().	c: d: Note: Do not leave a trailing '/' or '\' character at the end of the path.
unixdrivestocrawl	On UNIX, the set of local drives or directory paths where PS_HOME, PS_CFG_HOME, and PIA_HOME are located. Note: The environment variable for PS_APP_HOME should be set in the application server/batch server configuration.	\$HOME Note: Do not leave a trailing '/' or '\' character at the end of the path.
chunksize	Only applicable to large files, which may be chunked when sent. The chunksize represents the maximum size in bytes of each chunk.	1048576 (1 MB) (used for large file transfers).

Configuration Parameter	Description	Default Value
SSL	Connects to EM Hub with HTTP or HTTPS connection. The options are: - None (Allowed List)- Lets to connect with HTTP connection. When you select this option, the keystore and truststore related fields will be disabled. - Server Certificates Only (Allowed List)- Lets to connect with one-way SSL. When this option is selected, keystore and keystore password fields are disabled. However, truststore related fields are enabled - Client and Server Certificate- Lets to connect with EM Hub using two-way SSL. When this option is selected, keystore and truststore related fields are enabled.	None (Allowed List)
Keystore	This is the path to keystore file.	NA
Keystore password	The keystore password stored in the psvault file. The password is stored in the PSCipher format.	NA
Truststore	This is the path to truststore file.	NA
Truststore password	The password is stored in the PSCipher format.	NA
psvault	This is the psvault file location where the encrypted keystore and truststore passwords are stored.	NA

Configuring PS Agent Home

If the environment variable PS_AGENT_HOME is not set, EMF writes to PS_HOME, which restricts the ability to run multiple agents specific to each application simultaneously on a shared PS_HOME. This also poses a security concern as users under which the EM Agent runs must have write access to PS_HOME.

Set the environment variable PS_AGENT_HOME to the directory where you want to write the environment management metadata. When you launch PSEMAgent, the system will check for the PS_AGENT_HOME location and copy the necessary files to the PS_AGENT_HOME directory and log all activity in that directory.

Note

If you are using a Portable PS_HOME, you must set the PS_AGENT_HOME variable to your Portable PS Home location.

Configuring Agents With a Secure PS_HOME

Change Assistant deploys the updates to the PS_HOME using the agents running on the managed servers. Therefore, the agent running on a server should have write access to the PS_HOME and its subdirectories.

Note

While specifying the crawl path in configuration.properties, make sure that the decoupled configuration home (PS_CFG_HOME) is also included.

Related Topics

- System and Server Administration: Working with the Default PS_CFG_HOME
- System and Server Administration: Securing PS_HOME on UNIX
- System and Server Administration: Securing PS_HOME on Windows

Running an Environment Management Agent

This section discusses how to:

- Run an agent.
- Start an agent automatically in Windows.

Running an Agent

Before you run an Environment Management agent, you must ensure that it's properly configured in the agent's configuration.properties file.

Starting the Agent

At a command prompt, navigate to *PS_HOME\PSEMAgent*.

Use one of these scripts to start the Environment Management agent:

- On Microsoft Windows, run *PS_HOME\PSEMAgent\StartAgent.bat*.

Note

If you want the agent to start automatically when the machine starts, use the Microsoft Windows service that's delivered as part of PeopleTools. Or, you can add the script to the startup applications.

- On UNIX, run `PS_HOME/PSEMAgent/StartAgent.sh`.

Note

If you want the Environment Management agent to start automatically on UNIX when the machine starts, add `StartAgent.sh` to the login/boot scripts.

The first time an agent starts, it crawls the machine to locate PeopleSoft elements on that machine. The results of searching the hard disk are saved in the `PS_AGENT_HOME\envmetadata\data\search-results.xml` file.

Note

When starting an agent manually from the command prompt or from a script, the command prompt will continue to stay open, and it is normal to see the output of the periodic heartbeat events ("sending pulse") in the command prompt as the agent communicates with the hub. By default these "pulses" are every 10 seconds, except when environment information is being uploaded to the hub. You can configure the agent to run in the background using the provided Windows service, and on UNIX by using the `nohup` command.

See [Starting an Agent in the Background on UNIX](#).

See [Starting an Agent With PSEMAgent Windows Service](#).

Note

Only one Environment Management agent can be started per machine. If an agent is already started, you may receive error messages indicating that the agent cannot be started because there is already one running on the machine.

Starting the Agent on a Secure PS_HOME

On Microsoft Windows:

1. Create a new shortcut from the desktop (right-click, New, Shortcut).
2. In the **Type the location of the item** enter:
`<PS_HOME>\PSEMAgent\StartAgent.bat -u :<domainname>\<username>`

For example:

`c:\ptinstalls\pt851\PSEMAgent\StartAgent.bat -u :example.com\user`

Where the user specified has write access to `PS_HOME`.

Note

When you run `<PS_HOME>\PSEMAgent\StartAgent.bat -u :<domainname>\<username>`, the `%TEMP%` directory is used. Both the user that runs the command and the "runas" user need write/execute access to the `%TEMP%` directory.

3. Click Next, and enter a name for the shortcut.
4. Use this shortcut to start the agent.

On UNIX:

1. Log in as the user who has write access to the `PS_HOME`.
2. `PS_HOME/PSEMAgent/StartAgent.sh`.

See System and Server Administration: Securing `PS_HOME` on UNIX.

Stopping the Agent

Use one of these scripts to stop the Environment Management agent:

- On Microsoft Windows, run `PS_HOME\PSEMAgent\StopAgent.bat`.
- On UNIX, run `PS_HOME/PSEMAgent/StopAgent.sh`.

Recrawl

If you install new software components, the running Environment Management agent doesn't automatically detect them. This is because, to improve performance, the agent doesn't crawl every time it starts up. Instead it crawls only if the `search-results.xml` file does not exist.

You can force a recrawl and make the new components manageable by reissuing the `StartAgent` command with the `recrawl` option:

1. Open a new command line window.
2. Change directories to `PS_HOME\PSEMAgent`.
3. Issue the following command:

```
StartAgent recrawl
```

This forces a recrawl and creates a new `search-results.xml` file. If an agent is already running, it publishes the results to the hub.

If the running Environment Management agent is connected to the hub constantly, the recrawl interval occurs every 24 hours by default. If the agent has not been connected to the hub for a few days, the hub requests the agent to recrawl when the agent contacts the hub the next time.

Note

Recrawling includes revalidating.

Note

The recrawl process assumes the Environment Management agent is running. If it is not running, you may see error messages in the output. It is recommended that before running a recrawl, you make sure the agent is running.

Revalidate

If the Environment Management agent does not recognize any of the installed components, the search-results.xml file may not exist or may contain only an entry for Host. The problem may be that the agent needs to have permission to read directories as well as execute programs. Grant these permission for the agent. Also check whether the agent has permission to create a file on the local file system. Finally, check whether the disk is full. The agent might have no disk space to create a search-results.xml file.

If the hub is not running, you may receive the following error messages in the agent log or console:

- Broken connection - attempting to reconnect.
- RemoteException while connecting to server - retrying attempt 1.
- RemoteException while connecting to server - retrying attempt 2.
- RemoteException while connecting to server - retrying attempt 3.

Once the Environment Management hub is back up, the agent will successfully connect. There's no need to stop and restart the agent.

Note

If you are performing a recrawl, you don't need to separately revalidate.

Command-Line Arguments for the Agent

You can run these command-line arguments with the startAgent.bat (or startAgent.sh) script.

Argument	Description	Sample Output
version	Returns the version of the agent.	Version:8.45 Build Number: 109
shutdown	Shuts down a previous instance of the agent if it is running.	If the agent does not exist: Shutting down Agent.... Unable to detect a running agent... Instance does not exist If the agent exists: Shutting down Agent.... Shut down normally

Argument	Description	Sample Output
url	Prints the URL of the hub with which the agent is configured to communicate.	http://192.0.2.1:80/PSEMHUB/hub
validate	Validates the current set of managed components that have been discovered from the last crawling by the agent.	Not applicable (NA)
recrawl	Recrawls the hard disk to detect new configurations. Recrawls the detected database environments to update database information. The current search-results.xml file is backed up. Note: Recrawling includes revalidating.	NA
isrunning	Returns true if an agent is already running and false if an agent is not already running.	NA
remove	Removes the peer and all its registered components from the hub.	Removal Completed- PeerID 2 has been removed. Removal Failed- PeerID 2 could not be removed from the hub.

Starting an Agent in the Background on UNIX

Use the UNIX `nohup` command with the `StartAgent.sh` script to start an agent automatically and run in the background. This enables you to avoid having a command prompt open at all times showing the constant heartbeat of the agent. You can specify an output file to store heartbeat information.

For example,

```
nohup ./StartAgent.sh > agent_output.log &
```

Starting an Agent With PSEMAgent Windows Service

You can set an Environment Management agent to start automatically when your Environment Management machine boots and run in the background. This enables you to avoid having a command prompt open at all times showing the constant heartbeat of the agent.

For this option, use the *PSEMAgent* Windows service that's delivered as part of PeopleTools.

Installing the PSEMAgent Service

You install the PSEMAgent service from a command prompt. Copies of the install program are located in two places:

`PS_HOME\bin\client\winx86`

`PS_HOME\bin\server\winx86`

To install the PSEMAgent service:

1. At a command prompt, change to either location of the install program.
2. Enter the following command:

```
PSEMAgentService /install PS_HOME\PSEMAgent
```

Where *PS_HOME* is the PeopleTools installed location.

The PSEMAgent service is now installed, but not started. It's configured by default to start automatically when the system boots, and to log on using the local system account. You can start it manually, or wait for the next reboot.

Note

The PSEMAgent service is configured to start as an automatic service, by default. However, the Hub must be running prior to the PSEMAgent service attempting to start, or the PSEMAgent service will not start successfully. It is recommended to set the PSEMAgent service to manual start in the Windows Services interface. Then, to start the PSEMAgent service, start it manually from the Services interface.

Starting the PSEMAgent Service

You can start the PSEMAgent service from a command prompt, or from the Windows Services control panel. The name of the service follows this convention: *PeopleSoft Environment Management Agent-<release>*.

- To start the PSEMAgent service from a command prompt, use the NET START command. For example:

```
NET START "PeopleSoft Environment Management Agent-8.50"
```

- To start the PSEMAgent service from the Windows Services control panel:
 1. Open the Windows Control Panel, then double-click Administrative Tools, then Services.
 2. In the Services control panel, right-click the *PeopleSoft Environment Management Agent* entry and select **Start**.

Stopping the PSEMAgent Service

You can stop the PSEMAgent service from a command prompt, or from the Windows Services control panel.

- To stop the PSEMAgent service from a command prompt, use the NET STOP command. For example:

```
NET STOP "PeopleSoft Environment Management Agent-8.50"
```

- To stop the PSEMAgent service from the Windows Services control panel:
 1. Open the Windows control panel, then double-click Administrative Tools, then Services.
 2. In the Services control panel, right-click the *PeopleSoft Environment Management Agent* entry and select **Stop**.

Uninstalling the PSEMAgent Service

You uninstall the PSEMAgent service from a command prompt.

To uninstall the PSEMAgent service:

1. At a command prompt, change to either location of the uninstall program.

Copies of the uninstall program are located in two places:

PS_HOME\bin\client\winx86

PS_HOME\bin\server\winx86

2. Enter the following command:

`PSEMAgentService /uninstall`

PSEMAgentService determines if the service is currently started, and automatically stops it before completing the uninstall operation. You'll see messages reporting on the status of the operation.

Note

If the service is currently stopped, you'll see an error message indicating that it can't be stopped. Regardless of this, the uninstall operation completes normally.

Running the Viewer

To view data from the Environment Management hub:

1. Run a Java program to connect to the hub and retrieve the information in XML format.

Run the appropriate script for your environment in from *PS_HOME\PSEMViewer*. You will be prompted for the web server's listening port.

- UNIX: `./GetEnvInfo.sh`
- Windows: `GetEnvInfo.bat`

Note

For security reasons, the Java program connects only to the local host.

2. Open *PS_HOME\PSEMViewer\envmetadata\data\viewer.html* to view the information in the generated XML file.

Configuring and Starting an Environment Management Agent on z/OS

To run an agent on z/OS, you must have installed JRE delivered with PeopleTools on the z/OS machine.

To configure and start the agent on z/OS:

1. Edit the configuration.properties file (*PS_HOME\PSEMAgent/envmetadata/config*).

2. Edit `hubURL` and define the hub machine name and hub port.
3. Edit `unixdrivestocrawl` and set it to the set of directories that need to be crawled.
4. Edit `StartAgent.sh`.

On the first line, replace `PS_HOME` with your *PS_HOME* location.

Edit the last line to point to your JRE location.

5. Edit `StopAgent.sh`.

On the first line, replace `PS_HOME` with your *PS_HOME* location.

Edit the last line to point to your JRE location.

The default charset on z/OS is EBCDIC. If you wish to view the content of *PS_HOME/PSEMAgent/envmetadata/data/search-results.xml*, you need to run the following commands:

```
cd PS_HOME/PSEMAgent/envmetatda/data
. PS_HOME/psconfig.sh
PS_HOME/bin/psuniconv utf-8 search-results.xml ccsid1047 result.txt
```

Note

To change the newline characters, use one of transformations - NewLine LF, NewLine CR, or NewLine CRLF at the end of the command. This utility is available to use in the `bin` directory.

This comment is also true for *PS_HOME/PSEMAgent/envmetadata/data/matchers.xml*.

You can find a viewable version of the results in `result.txt`. You can also FTP (binary) these files to a different machine running a different operating system and view them in any editor.

4

Configuring Change Assistant

Installing Change Assistant

Change Assistant runs on supported Microsoft Windows workstations and limited use on Linux.

Complete installation instructions for Change Assistant appear in your PeopleSoft 9.2 Application Installation guide.

See *PeopleSoft 9.2 Application Installation* for your database platform: Installing PeopleSoft Change Assistant

For hardware and software requirements, consult *My Oracle Support, Certifications*.

Microsoft Windows

Change Assistant can be installed from:

- PeopleSoft Update Image DPK
See [Installing Change Assistant from PeopleSoft Update Image DPK](#)
- PeopleTools Client DPK
See [Installing Change Assistant from PeopleTools Client DPK](#)
- PeopleTools Client DPKs in Update Manager Mode
See [Installing Change Assistant for PUM](#)
- Setup.bat
See [Installing Change Assistant Using Setup.bat](#)

Note

A new version of Change Assistant is delivered with each PeopleTools patch.

PeopleSoft Change Assistant installation includes the following features:

- You can install multiple instances of PeopleSoft Change Assistant (PeopleTools 8.55 and above) on one physical machine.

Note

Multiple Instances of Change Assistant can run in parallel starting with PeopleTools 8.56, however you can not run multiple instances against the same target database. See [Running Multiple Instances of Change Assistant](#)

- You must install each PeopleSoft Change Assistant instance in a separate installation location.
- You can remove or upgrade each PeopleSoft Change Assistant instance separately.
- When you remove an installation instance, you have the option to save the existing configuration information in a group of files gathered in a zip archive. You can configure Change Assistant at a later time by importing the zip file.

Linux

When you install the PeopleTools DPK for Linux, you can select to install Change Assistant.

Linux only supports a command line version of Change Assistant for Update Manager mode.

Linux is not supported for target databases that are below PeopleTools 8.57.17.

Installing Change Assistant from PeopleSoft Update Image DPK

Starting with PeopleTools 8.59, when you deploy the PeopleSoft Update Image from the DPK, Change Assistant will be installed and configured for the PUM Source. The installation will create folders for staging, output, and download directories. The Image and REST credentials are also updated in the PUM database.

Note

This Change Assistant installation is for the exclusive use of PUM Automated Updates and should not be used for any other purpose.

See *PeopleSoft Deployment Packages for Update Images Installation* for the current PeopleSoft PeopleTools release.

See [Setting Credentials for Automation](#).

Installing Change Assistant from PeopleTools Client DPK

PeopleTools Client deployment is documented in *PeopleSoft PeopleTools 8.5x Deployment Packages Installation*, Task 2-5: Deploying the PeopleTools Client DPK. The directions here only refer to the Change Assistant portion.

When you deploy PeopleTools Client in standalone mode using (`SetupPTClient.bat -t`), you will be prompted whether or not to install Change Assistant.

Do you want to install Change Assistant? [Y/N]:

If you answer y (yes), specify the installation directory, or accept the default, C:\ProgramFiles\PeopleSoftChange Assistant:

Please specify the directory to install Change Assistant [C:\Program Files\PeopleSoft\Change Assistant]:

If you enter a directory where a previous version of Change Assistant is installed, it will upgrade that version to the new PeopleTools release/patch. If you enter a new directory, a new instance of Change Assistant will be installed.

Installing Change Assistant for PUM

Windows Client Installation is documented in *PeopleSoft Deployment Packages for Update Images Installation (PeopleSoft PeopleTools 8.5x)*, Task 2-6: Deploying the PeopleTools Client DPKs in Update Manager Mode.

When you deploy PeopleTools Client in Update Manager Mode from the `tools_client` directory using (`SetupPTClient.bat`), Change Assistant is always installed for PeopleTools release of the PUM Source.

Installing Change Assistant Using Setup.bat

`Setup.bat` is located in the `PS_HOME\setup\PsCA` directory.

You can use `Setup.bat` to create a new instance of Change Assistant, update an existing instance or delete an existing instance.

Installing a New Instance of Change Assistant using Setup.bat

To install a new instance of Change Assistant:

1. From the `PS_HOME\setup\PsCA` directory, run `Setup.bat`.

Note

If you have existing instances of Change Assistant and select to install a new instance the same wizard is used.

2. Enter 1 on the PeopleSoft Change Assistant menu.
3. Accept the default Destination Folder or enter the path for Change Assistant. The default destination folder is `C:\PS\Change Assistant`.

```
-----
PeopleSoft Change Assistant
-----
```

- ```
1) New Installation
2) Maintain or Update
q) Quit
```

```
Command to execute (1-2, q):1
```

```
PeopleSoft will install Change Assistant to the following directory .
Destination Folder [C:\PS\Change Assistant] :
```

If the installer detects an existing installation in the destination folder that you specified, you see a message telling you to uninstall the instance.

Change Assistant already installed in this path. Please uninstall it before new installation Exiting installer after detecting old installation

4. When the copy is complete, a shortcut to the new Change Assistant will appear on your desktop.

**Uninstalling PeopleSoft Change Assistant Instances in the Current Release**

To uninstall an instance of Change Assistant:

1. From the *PS\_HOME\setup\PsCA* directory, run *Setup.bat*.
2. Enter 2 on the PeopleSoft Change Assistant menu.

```

PeopleSoft Change Assistant

1) New Installation
2) Maintain or Update
q) Quit
Command to execute (1-2, q):2
```

3. Select the installed instance you want to uninstall.

```
Please select the instance of Change Assistant :
1) Change Assistant 2 PT856.07 C:\Program Files\PeopleSoft\Change
Assistant
2) Change Assistant 3 PT857.01 C:\CA

q)Quit
Command to execute (1-2, q):1
```

4. Enter 2 to uninstall the selected instance.

```
Please select the activity :
1) Upgrade Selected Instance
2) Uninstall Selected Instance
q)Quit
Command to execute (1-3, q):2
```

5. When you uninstall an instance of Change Assistant, you have the option of retaining the existing configuration. If you select 2, you will see a message that gives the name of the backupconfiguration file, such as *changeassistantcfgbak.zip*, and the installation location where you can find it, for example *C:\Program Files\PeopleSoft\Change Assistant*.

```
Please select the activity :
1)Without Retaining existing configuration
2)Retaining existing configuration
q)Quit
Command to execute (1-3, q):1
```

**Updating Existing Instance of Change Assistant**

To update an existing instance of Change Assistant:

1. From the *PS\_HOME\setup\PsCA* directory, run *Setup.bat*.
2. Enter 2 on the PeopleSoft Change Assistant menu.

```

PeopleSoft Change Assistant

```

```
1) New Installation
2) Maintain or Update
q) Quit
Command to execute (1-2, q):2
```

3. Select the installed instance you want to update.

```
Please select the instance of Change Assistant :
1) Change Assistant 1 PT856.07 C:\ca856
2) Change Assistant 4 PT857.01 C:\PS\Change Assistant

q)Quit
Command to execute (1-2, q):1
```

4. Select to upgrade the selected instance.

```
Please select the activity :
1) Upgrade Selected Instance
2) Uninstall Selected Instance
q)Quit
Command to execute (1-3, q):1
```

5. Select if you want to retain the existing configuration.

```
Please select the activity :
1)Without Retaining existing configuration
2)Retaining existing configuration
q)Quit
Command to execute (1-3, q):2
```

If you retain the existing configuration, the configuration will be automatically imported when you open the Change Assistant instance.

## Define Environment Identification

In the browser, navigate to the PeopleTools Options page (PeopleTools, Utilities, Administration, PeopleTools Options) and make sure that the **Environment Long Name** and **Environment Short Name** are specified correctly.

The Environment Management Framework and Change Assistant use these values, along with the GUID, to identify an environment and associate environment information with a particular named environment. Likewise, it enables you to search for updates for a specific environment.

### Related Topics

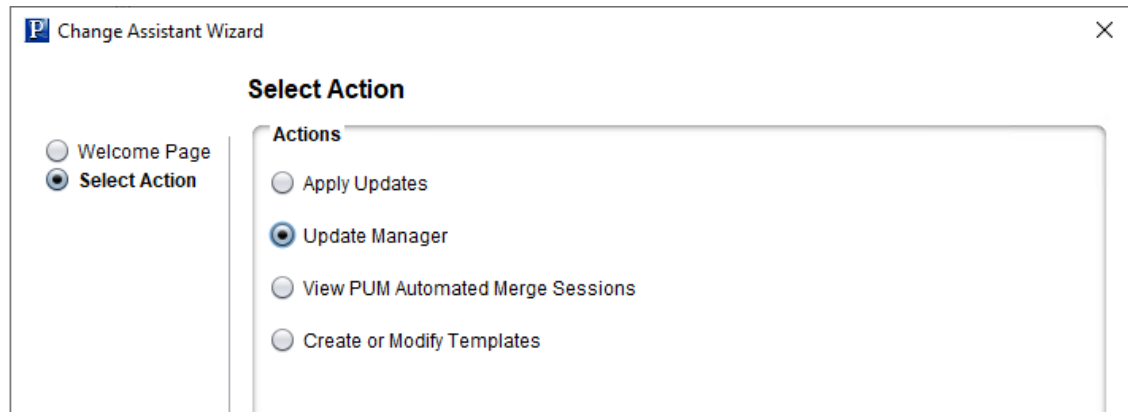
- [Cloned Databases Not Being Unique](#)  
When copying databases, it is extremely important to delete the GUID value in the new (copied) database. If not deleted, the hub will assume that the two environments are the same, leading to confusing environment records.

## Opening Change Assistant the First Time

The first time you open Change Assistant after installing it, you will be presented with the Welcome menu. You can select not to display this page again.

Click Next to view the Change Assistant Options.

This example illustrates the fields and controls on the Change Assistant Wizard – Select Action page. You can find definitions for the fields and controls later on this page.



Depending on the action you select, the Change Assistant Wizard will guide you through the steps. Each of these actions has a topic that will provide details.

| Field or Control      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Apply Updates</b>  | <p>Any systems that are not PUM enabled, will use the Apply Updates option to apply updates downloaded from My Oracle Support.</p> <p>Apply Updates can be used with any non-PUM change packages.</p> <p>See <a href="#">Applying Updates To A Target Environment</a></p> <p>This option is also used for <i>Required For Install</i> fixes in PUM releases.</p>                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Update Manager</b> | <p>Update Manager is used to create and apply PUM Change Packages and PUM PeopleSoft Release Patches (PRP). PeopleSoft Update Images (PI) are fully functioning instances of the PeopleSoft environment that contain the updates for a PeopleSoft application. The PeopleSoft Update Manager PIA application is used in the PeopleSoft Update Image to search for updates, review potential change impact, and create a custom change package definition that is based on the updates you selected for your environment.</p> <p>Update Manager action is also used to apply PeopleTools patches and upgrade PeopleTools release.</p> <p><b>Note:</b> Update Manager is only available for PUM enabled applications patching.</p> <p>See <a href="#">Update Manager Action Overview</a></p> |

| Field or Control                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Create or Modify Templates</b> | <p>Change Assistant templates are composites of all the possible steps that apply to an update or upgrade. The templates are delivered as part of the change package. Once you select a change package, the template is loaded into the Change Assistant internal storage. You can edit the template or add additional chapters, tasks and steps, if needed.</p> <p><b>Note:</b> In order to modify a template, you need to import the template from the change package. After making any modifications, you need to export the template into the same change package as the import in order for the template to be usable in a job.</p> |
| <b>Merge Select Object Types</b>  | <p>Select this option to review the merge session details that were created as part of the change package apply.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Specifying Change Assistant Options

When you first start Change Assistant, you will need to define options necessary for the selected action. Only the options related to the Change Assistant Action you selected will be displayed. Many of the options apply to all actions. If you are using the Change Assistant Wizard, after you select an action and click Next, the General Options page will be displayed.

| Option             | Description                                                                                                                                                                                                                                         |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| General            | <p>The General Options define the Change Assistant PS Homes and directory paths used with associated action.</p> <p>Depending on the action selected, only the paths relating to that action are displayed.</p>                                     |
| PUM Source Options | <p>The PUM Source is only used with Update Manager, to define the PeopleSoft Update Image that will be used for applying application and PeopleTools updates.</p> <p>For all other actions, PUM Source Options are skipped.</p>                     |
| EM Hub Options     | <p>For Update Manager, the Environment Management Hub is used to deploy files. If you are deploying files manually, leave the Define EM Hub check box deselected.</p> <p>EM Hub is only required for traditional updates (Apply Update action).</p> |
| Additional Options | <p>Additional options include email notifications and proxy information. These options are optional and available with all actions.</p>                                                                                                             |

**Note**

Once the environment has been configured, you can use **Tools**, and then **Options** to make any changes to the environment options.

## Defining Databases

Each source or target database that is used with Change Assistant needs to be defined. When you create the database definition, the system will query the database for details including:

- If the database is Unicode
- Products
- Product Line
- Industry
- Languages
- Base Language
- PeopleTools Version

To create a new database:

1. Access the Database Wizard using one of the following methods:
  - Directly from the Change Assistant menu, select File, New Database.
  - From another Wizard or PeopleTools Options page that includes the Create button for the database. Click Create.
2. On the Define Database page, enter the information for the database you are defining. Depending on the action you selected and the database type, complete the fields necessary.
3. Click Next.

Change Assistant will query the database and gather additional database information.

**Note**

Change Assistant will verify the connection to the database, including User ID/password, Access ID/password, and Connect ID/password. You will need to correct any errors before continuing to define the database.

4. The information is then displayed on the Additional Database Details page.
5. Click Next and the Confirm Settings page is displayed.
6. Click Finish.

This example illustrates the fields and controls on the Database Wizard - Define Database page. You can find definitions for the fields and controls later on this page.

## Define Database

## Task Steps

## ● Define Database

Type: Oracle

Database Name: H92CD01C

**User Information**

User ID: PS User Password: \*\*\*

Access ID: emdbo Access Password: \*\*\*\*\*

Connect ID: people Connect Password: \*\*\*\*\*

☐ Set DB Owner Credentials

DBOwner ID:  DBOwner Password:

SQL Client Tool: C:\psft\db\oracle-server\12.1.0.2\BIN\sqlplus.exe

**Current Homes**

PS Home: C:\PT8.56.10\_Client\_ORA\

PS App Home: C:\HR92

PS Cust Home: C:\customdirectory

**SQR Settings**

SQR Executables (SQRBIN) <PS\_Home>\bin\sqr\<plat>\bin\w

SQR Flags (PSSQRFLAGS) -ZIFC:\PT8.56.10\_Client\_ORA\sqr\pssqr.ini

PSSQR Path <StagingDir>sqr;<Cust\_Home>sqr;<App\_Home>sqr;<PS\_Home>sqr

☐ Configure New Homes for Upgrade

☐ Configure Process Scheduler for Upgrade

☐ Configure PeopleSoft Test Framework

Back Next Finish Cancel

The Database Configuration Wizard provides a separate configuration page for each database type, containing these settings:

| Field or Control            | Description                                                                                                                                                                                  |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Database Type</b>        | Select a database platform from the list. Based on signon requirements for the database platform that you select in this field, other fields will be disabled or become available for entry. |
| <b>Database Name</b>        | Enter a name of up to 8 characters for the database.<br>If EMF is configured and running, you can select a database from Hub.                                                                |
| <b>Database Server Name</b> | Only applies to Informix, Microsoft SQL Server and Sybase.<br>If applicable, enter a name of up to 256 characters for the database server name.                                              |
| <b>Owner ID</b>             | (Used for DB2 z/OS only). Enter the owner ID used for the tables.                                                                                                                            |

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>User ID and Password</b>     | Enter the PeopleSoft user ID and password for the database that will be used to perform the upgrade. Examples of user IDs are VP1 and PS.                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Access ID and Password</b>   | <p>The access ID has full access to all objects in the database.</p> <p>Your access ID is <i>not</i> a PeopleSoft user ID, such as <i>VP1</i> or <i>PS</i>. Examples of access IDs are <i>sa</i> or <i>sysadm</i>.</p> <p><b>Note:</b> For Microsoft SQL Server the access ID must also have System Administrator privileges.</p> <p><b>Note:</b> The IDs and passwords are case-sensitive.</p> <p><b>Note:</b> The access ID is often the database owner. It is not normally the same value as the connect ID, which has limited access to the database.</p> <p>See Security Administration: Access IDs.</p> |
| <b>Connect ID and Password</b>  | Enter the connect ID and password for the target database. The default connect ID is people.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Set DB Owner Credentials</b> | <p>If this check box is select, then the DB Owner ID and DB Owner Password Fields are required fields.</p> <p>The DB Owner is only used with the step type SQLScript-DBO. When the SQLScript-DBO step executes, the <i>Set DB Owner Credentials</i> option is checked prior to issuing the commandline. If the attribute is disabled, the job will exit with an error stating the credentials are not set, rather than attempting to execute the command and failing.</p>                                                                                                                                     |
| <b>DB Owner ID and Password</b> | Enter the Database Owner ID and password for the target database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

| Field or Control                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SQL Client Tool                              | <p>Select the correct executable for the database platform. Valid SQL query executables for each platform are:</p> <ul style="list-style-type: none"> <li>• DB2: db2cmd.exe</li> <li>• Microsoft SQL Server: sqlcmd.exe</li> <li>• Oracle: sqlplus.exe</li> </ul> <p><b>Note:</b> Change Assistant uses the command line version of the .exe, not the GUI version. For example, sqlplus.exe is used for an Oracle database, rather than sqlplusw.exe.</p> <p><b>Important:</b> <i>Oracle Database Customers:</i> For systems running on the Oracle database, by default, Change Assistant copies the generated SQL script files to the location specified as the TEMP User variable on the Environment Variables dialog box. So, on Oracle, the generated SQL script files will actually exist in two locations: the specified Change Assistant output directory, and the TEMP directory. This behavior is in place because some versions of Oracle SQL Plus do not support path names longer than 79 characters. It is recommended that you ensure that the value specified for the TEMP User variable is set to a path short enough so that the string comprising the path and generated SQL file will not exceed 79 characters.</p> |
| Current Homes <b>PS Home</b>                 | <p>Enter the location of your current PS_HOME.</p> <p><b>Note:</b> Oracle recommends using a mapped drive.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Current Homes <b>PS App Home</b>             | <p>Enter the location of your current PS_APP_HOME.</p> <p><b>Note:</b> Oracle recommends using a mapped drive. Do not enter your PS_HOME directory.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Current Homes <b>PS Cust Home</b>            | <p>Enter the location of your current PS_CUST_HOME.</p> <p><b>Note:</b> Oracle recommends using a mapped drive. Do not enter your PS_HOME directory.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| SQR Settings <b>SQR Executables (SQRBIN)</b> | <p>The SQRBIN value is read only and derived from the PS Home and platform setting.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| SQR Settings <b>SQR Flags (PSSQRFLAGS)</b>   | <p>By default , the -ZIF parameter is to set the full path and name of the SQR initialization file, SQR.INI. Make any necessary changes or add additional SQL parameters if needed.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Field or Control                        | Description                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SQR Setting <b>PSSQR Path</b>           | <p>This field is read-only and will contain the path that is used in Change Assistant:</p> <ol style="list-style-type: none"> <li>1. StagingDirectory\SQR</li> <li>2. PS_CUST_HOME\SQR</li> <li>3. PS_APP_HOME\SQR</li> <li>4. PS_HOME\SQR</li> </ol> <p>Each path is separated by a “;” (semi-colon).<br/>The static display is:<br/>“&lt;StagingDir&gt;\SQR;&lt;Cust_Home&gt;\SQR;&lt;App_Home&gt;\SQR;PS_Home&gt;\</p> |
| <b>Configure New Homes for Upgrade</b>  | <p>Select this option to define new PeopleSoft Homes for a PeopleTools upgrade.<br/>See <a href="#">Using Change Assistant to Upgrade PeopleTools</a>.</p>                                                                                                                                                                                                                                                                |
| <b>Enable Process Scheduler</b>         | <p>Select this option to define up to two Process Scheduler servers to run ProcessScheduler steps during the upgrade job run.<br/>This option only applies in an application upgrade.<br/>See <a href="#">Specifying Database Process Scheduler Settings</a></p>                                                                                                                                                          |
| <b>Enable PeopleSoft Test Framework</b> | <p>Select this option if the upgrade contains PTF steps or if you want to incorporate PTF scripts into your template.<br/>See <a href="#">Specifying PeopleSoft Test Framework Settings</a></p>                                                                                                                                                                                                                           |

## Configuring New Homes for Upgrade

If you have selected the Configure New Homes for Upgrade check box for an applicable database definition, you must enter the required information for the new homes.

This example illustrates the fields and controls on the Database Wizard – New Homes page. You can find definitions for the fields and controls later on this page.

Database Wizard

Task Steps

Define Database

New Homes

Define Database

New Homes

Retrieve Database Details using New PS Home

PS Home:

C:\PT8.57\

...

PS App Home:

C:\HR92

...

PS Cust Home:

C:\customdirectory

...

SQR Settings

SQR Executables (SQRBIN)

<PS\_Home>\bin\sqr\<plat>\binw

SQR Flags (PSSQRFLAGS)

-ZIFC:\PT8.57\sqr\pssqr.ini

PSSQR Path

<StagingDir>sqr;<Cust\_Home>sqr;<App\_Home>sqr;<PS\_Home>sqr

| Field or Control                            | Description                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Retrieve Database Details using New PS Home | <p>When performing a PeopleTools upgrade, initially you will connect to your target database using your current PS Home. Once the target database is updated to the new release, the rest of the steps will require you to connect using the New PS Home.</p> <p>Select this checkbox if you need to edit the database after the database has been upgraded to the new PeopleTools release.</p> |
| PS Home                                     | <p>Enter the location of new PS_HOME.</p> <p><b>Note:</b> Oracle recommends using a mapped drive.</p>                                                                                                                                                                                                                                                                                           |
| PS App Home                                 | <p>Enter the location of your new PS_APP_HOME.</p> <p><b>Note:</b> Oracle recommends using a mapped drive. Do not enter your PS_HOME directory.</p>                                                                                                                                                                                                                                             |
| PS Cust Home                                | <p>Enter the location of your new PS_CUST_HOME.</p> <p><b>Note:</b> Oracle recommends using a mapped drive. Do not enter your PS_HOME directory.</p>                                                                                                                                                                                                                                            |
| SQR Executables (SQRBIN)                    | <p>The SQRBIN value is read only and derived from the PS Home and platform setting.</p>                                                                                                                                                                                                                                                                                                         |
| SQR Flags (PSSQRFLAGS)                      | <p>By default , the -ZIF parameter is to set the full path and name of the SQR initialization file, SQR.INI. Make any necessary changes or add additional SQL parameters if needed.</p>                                                                                                                                                                                                         |

| Field or Control  | Description                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PSSQR Path</b> | <p>This field is read-only and will contain the path that is used in Change Assistant:</p> <ol style="list-style-type: none"> <li>1. StagingDirectory\SQR</li> <li>2. PS_CUST_HOME\SQR</li> <li>3. PS_APP_HOME\SQR</li> <li>4. PS_HOME\SQR</li> </ol> <p>Each path is separated by a “;” (semi-colon).<br/>The static display is:<br/>“&lt;StagingDir&gt;\SQR;&lt;Cust_Home&gt;\SQR;&lt;App_Home&gt;\SQR;PS_Home&gt;\.”</p> |

## Specifying Database Process Scheduler Settings

If you have selected the Enable Process Scheduler check box for an applicable database definition, you must enter the required information for the host machine and the Process Scheduler server definitions associated with that database that will be running the ProcessScheduler steps.

This example illustrates the fields and controls on the Database Wizard – Process Scheduler Settings page. You can find definitions for the fields and controls later on this page.

| Field or Control                  | Description                                                                                                                                               |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Machine name or IP</b>         | Enter the host name or the IP address of the application server where the appropriate Process Scheduler server domain is running (PSPRCRV.EXE and so on). |
| <b>JSL Port</b>                   | Enter the domain's JSL port (listener port).                                                                                                              |
| <b>Domain Connection Password</b> | Enter the domain connection password for the application server.                                                                                          |

| Field or Control                                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Server Name</b>                                 | Enter the name of the Process Scheduler server definition, such as PSUNIX.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Method of retrieving Process Scheduler logs</b> | <p>You can download and view the Process Scheduler logs from within Change Assistant so that you don't need to monitor the processes separately using Process Scheduler monitoring and logging. Similar to other Change Assistant log files, the downloaded Process Scheduler log files are saved to the Change Assistant output directory.</p> <ul style="list-style-type: none"> <li>• <b>None:</b> Disables the ability to view Process Scheduler log information from within Change Assistant.</li> <li>• <b>File Copy:</b> Select if Process Scheduler is running on a Windows or Linux server. Users needs to map a Windows or NFS share path as a network drive.</li> </ul> <p>To copy log files when using Process Scheduler on Linux server:</p> <ol style="list-style-type: none"> <li>1. Install NFS share on Linux.</li> <li>2. Set up NFS share for Log/output directory.</li> <li>3. Map the shared folder on your Windows machine as a network drive.<br/><b>Note:</b>If the network drive is protected, Windows prompts for user ID and password before mapping.</li> <li>4. Add this mapped folder path as Log/output Directory while adding database to Change Assistant in Process Scheduler settings.</li> </ol> <p>Otherwise, you can directly download log files from Process Monitor on the PIA page.</p> <p>If running Change Assistant on Linux, user must mount the NFS share to a local path and configure the same in Change Assistant database definition.</p> <p><b>Note:</b> If you have configured multiple Process Scheduler servers within your upgrade environment, and they each run processes within the job, as needed, note that the log information will reside in two locations, with each location containing the log information associated with the processes run on that server.</p> |
| <b>Log/output Directory</b>                        | Applies to File Copy. Enter the path to where the Process Scheduler logs are located on the server. This is the (mapped) path on the Change Assistant workstation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Specifying PeopleSoft Test Framework Settings

If you selected the Enable PeopleSoft Test Framework option, you will need to supply PTF connection settings.

| Field or Control          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Server:Port</b>        | <p>Enter the server name and port for the environment. Contact your Integration Broker administrator or system administrator for the correct values.</p> <p>The format for the <b>Server:Port</b> field is:</p> <p><code>&lt;machine_name&gt;:&lt;https_port&gt;</code></p> <p>For example:</p> <p><code>rtdc79614.example.com:443</code></p> <p>If the https port is the default 443 the port is optional.</p> <p>You can also enter a complete https URL in this format:</p> <p><code>https://&lt;machine_name&gt;:&lt;https_port&gt;/PSIGW/HttpListeningConnector</code></p> <p>For example:</p> <p><code>https://rtdc79614.example.com:443/PSIGW/HttpListeningConnector</code></p> |
| <b>Node ID</b>            | <p>This field is required if more than one database is connected to the server. Enter the name of the PeopleSoft node with which the integration gateway is to communicate.</p> <p>Contact your Integration Broker administrator or system administrator for the correct values.</p>                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Execution Options</b>  | Specify the name of the Execution Options configuration to use.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Path to PTF Client</b> | <p>Specify the path to the PTF client executable.</p> <p>The default location is <code>C:\Program Files\PeopleSoft\PeopleSoft Test Framework</code>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Use Proxy Options</b>  | Select this option to enter details for the proxy server. When you select this option, the proxy information fields are enabled.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

---

| Field or Control         | Description                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Proxy Information</b> | <p>Enter the following information for the proxy server:</p> <ul style="list-style-type: none"><li>• <b>Server:</b> Enter the server name.</li><li>• <b>Port:</b> Enter the server port.</li><li>• <b>User:</b> Enter the user ID for the proxy server.<br/>If you use network authentication, use the DOMAIN\USER format.</li><li>• <b>Password:</b> Enter the password.</li></ul> |

---

# 5

## Working With Change Assistant

### Understanding The Change Assistant Interface

Change Assistant enables you to run, view, and modify Change Assistant templates. You open Change Assistant on a Windows workstation by selecting Start, Programs, PeopleSoft Change Assistant 8.5x.xx, Change Assistant.

Change Assistant enables you to:

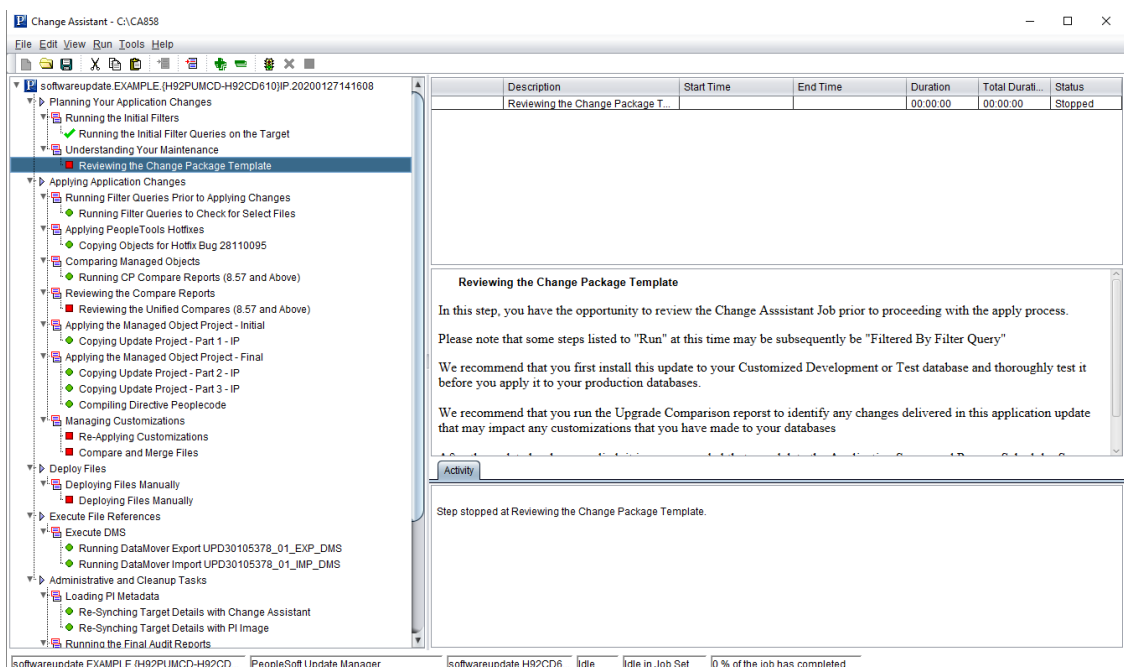
- View, modify, and create Change Assistant templates or jobs.
- Run PeopleSoft update and upgrade jobs.

Select and configure the action and task to perform. A Change Assistant job is created from the change package selected.

#### Note

Before starting and running Change Assistant, application servers, Process Scheduler servers, and web servers should be running. If you are planning to use EM Hub for file deploy or using the Apply Updates (non-PUM) action, then ensure all agents running on the servers are running and sending pulses.

This example illustrates the fields and controls on the Change Assistant interface. You can find definitions for the fields and controls later on this page.



When you have a Change Assistant template or job open, you use these areas in the project workspace:

| Interface Area    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Template tree     | <p>The template tree section displays distinct nodes for the chapters, tasks, and steps within a template.</p> <ul style="list-style-type: none"><li>• Chapters are section dividers that group and display the tasks.</li><li>• Tasks are section levels that contain one or more steps.</li><li>• Steps are the actual update actions that complete the processing of your update job.</li></ul> <p><b>Note:</b> Properties are assigned at the step level in the template, not the task or chapter level.</p> |
| Properties box    | <p>Depending on what is selected in the template tree, the properties box displays the properties associated with that node.</p> <p>For the Create or Modify Templates action, the properties box displays the properties assigned to the step when it was defined.</p> <p>For a job, the properties box displays information related to the progress of a step, such as start time, end time, total duration, and so on.</p>                                                                                    |
| Documentation box | <p>Each template contains its own built-in documentation to provide guidance for a chapter, task, or step. The documentation exists in separate HTML files, but it appears in this box for each selected node on the template tree.</p>                                                                                                                                                                                                                                                                          |
| Activity box      | <p>The Activity box displays the processing and status messages associated with a step, when a job is running in Change Assistant. This is similar to the Output window in the Application Designer workspace.</p>                                                                                                                                                                                                                                                                                               |

## Working With Change Assistant Menu Options

This section describes the menu options available when using Change Assistant.

### Note

Some menu options are enabled only during a specific Change Assistant action, which is determined in the Change Assistant Actions dialog box.

### File Menu

The File menu contains some generic Windows options, plus these specific Change Assistant options:

| Menu Option  | Description                              |
|--------------|------------------------------------------|
| New Template | Creates a new Change Assistant template. |

| Menu Option      | Description                                                                                                                                                                                                                                                                                                                       |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open Template    | Opens a template from the Change Assistant storage (internal database).                                                                                                                                                                                                                                                           |
| Save Template    | Saves the template into the Change Assistant storage (internal database).                                                                                                                                                                                                                                                         |
| Save Template As | Saves the new template with the name you specify.                                                                                                                                                                                                                                                                                 |
| New Job          | Creates a new Change Assistant job.                                                                                                                                                                                                                                                                                               |
| Open Job         | Opens a job from the Change Assistant storage (internal database).                                                                                                                                                                                                                                                                |
| Save Job         | Saves the job into the Change Assistant storage (internal database).                                                                                                                                                                                                                                                              |
| Save Job As      | Saves the job with the name you specify.                                                                                                                                                                                                                                                                                          |
| Close            | Closes the current template or job.                                                                                                                                                                                                                                                                                               |
| Import Template  | Imports an existing template into Change Assistant.<br><b>Note:</b> Any modifications to the current template will not affect the original template that you imported. If you want others to obtain a copy of your modified template, you need to export it out of Change Assistant.                                              |
| Delete Template  | Removes the template from Change Assistant. When you delete a template, you also delete all the jobs associated with the template.<br><b>Note:</b> Press and hold the CTRL key to select multiple templates for deletion.                                                                                                         |
| Export Template  | Exports a copy of the template out of Change Assistant so others can use it.                                                                                                                                                                                                                                                      |
| Export Job       | Exports a copy of the job out of Change Assistant so others can use it.                                                                                                                                                                                                                                                           |
| Delete Job       | Removes a job associated with the current template.                                                                                                                                                                                                                                                                               |
| New Database     | Launches the Database wizard for creating a new database.<br>Change Assistant uses these settings to locate <i>PS_HOME</i> directories, connect to the Target database, and so on.                                                                                                                                                |
| Open Database    | Opens a defined database.                                                                                                                                                                                                                                                                                                         |
| Import Database  | Imports an existing database.                                                                                                                                                                                                                                                                                                     |
| Delete Database  | Deletes an existing database.                                                                                                                                                                                                                                                                                                     |
| Exit             | Exits Change Assistant.<br><b>Note:</b> This option is disabled when a Change Assistant step is running. To exit Change Assistant while a process is running, you must first force stop the process (select Run, Force Stop). When you relaunch Change Assistant you can resume at the point where you force stopped the process. |

## Edit Menu

The Edit menu contains some generic Windows options, plus these specific Change Assistant options:

| Menu Option                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Insert Chapter              | Inserts a new chapter. A chapter serves as a section head for multiple tasks.                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Insert Task                 | Inserts a new task within a chapter. A task serves as a section head for one or more steps.                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Insert Step                 | Inserts a new step within a task.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Step Properties             | When a step is selected, launches the Step Properties dialog.                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Rename                      | Renames an existing chapter, task, or step.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Run                         | Runs the selected step.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Stop                        | Stops the selected step.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Restart                     | <p>Restarts certain types of steps that you have stopped or have failed. Restart is supported for these step types:</p> <ul style="list-style-type: none"> <li>• Application Engine</li> <li>• SQL</li> </ul> <p>Application Engine programs can keep track of the state of a program run, and when restarted, they can pick up where a previous run stopped.</p> <p>When restarting SQL steps, Change Assistant generates a separate log file and numbers them incrementally, as in <i>logfile_2</i>, <i>logfile 3</i>, and so on.</p> |
| Complete                    | Marks the selected step as complete. Often used when setting a manual step to complete, indicating that the manual work is done.                                                                                                                                                                                                                                                                                                                                                                                                        |
| View Log                    | Opens the current job processing log.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| View Script                 | Opens the script associated with the selected step.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Job Properties              | Enables you to set properties for the job.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Set Documentation Directory | Specifies the directory into which your upgrade documentation is saved. Change Assistant loads the documentation for viewing when you open a template or job.                                                                                                                                                                                                                                                                                                                                                                           |
| Edit Documentation          | Enables you to modify the documentation associated with the selected chapter, task, or step.                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Finalize Documentation      | Generates the HTML files.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## View Menu

The View menu contains these specific Change Assistant options:

| Menu Option                     | Description                                                                                                                                                          |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step Details                    | Displays the step properties box in the Change Assistant workspace.                                                                                                  |
| Documentation                   | Displays the documentation box in the Change Assistant workspace.                                                                                                    |
| Activity                        | Displays the Activity box in the Change Assistant workspace.                                                                                                         |
| Expand All                      | Expands all chapters, tasks, and steps.                                                                                                                              |
| Collapse All                    | Collapses all chapters, tasks, and steps.                                                                                                                            |
| Steps Not Yet Completed         | Filters steps to show steps not yet completed.                                                                                                                       |
| Steps Completed by System       | Filters to show steps completed by the system. Deselect this option if you want to hide all the steps that have been completed.                                      |
| Steps Completed Manually        | Filters to show the steps that were manually completed. Deselect this option if you want to hide all the steps that have been manually completed.                    |
| Steps Filtered By Filter Query  | Filters to show the steps that were filtered using a query filter. Deselect this option if you want to hide all the steps that have been filtered by a filter query. |
| Steps Filtered at the Job Level | Filters to show the steps that were filtered at the job level. Deselect this option if you want to hide all the steps that have been filtered at the job level.      |

### Run Menu

The Run menu contains these specific Change Assistant options:

| Menu Option | Description                                                                                                                    |
|-------------|--------------------------------------------------------------------------------------------------------------------------------|
| Run         | Begins the execution of a Change Assistant job.                                                                                |
| Cancel      | Stops the processing of a Change Assistant job <i>after</i> the currently running process completes.                           |
| Kill        | Stops the processing of a Change Assistant job completely and immediately, <i>including</i> the step that's currently running. |

### Tools Menu

The Tools menu contains these specific Change Assistant options:

#### Note

If the menu option does not apply to the action selected, it will be grayed out.

| Menu Option                                 | Description                                                                                                                                                                                                                                                              |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Upload Target Database Information to Image | Enabled when action type is Update Manager.<br>Uploads the target database information to the PUM source.                                                                                                                                                                |
| Define Change Package                       | Enabled when action type is Update Manager.<br>Allows user to define a new change package in either Update Manager Dashboard or Change Assistant using standard searches.<br>See <a href="#">Defining Change Package</a>                                                 |
| Create Change Package                       | Enabled when action type is Update Manager.<br>Opens Change Assistant Wizard to select your database information and leads you through the process to create a change package.                                                                                           |
| Apply Change Package                        | Enabled when action type is Update Manager.<br>Opens Change Assistant Wizard to lead you through the process to apply a change package.<br>See <a href="#">Applying Change Package</a>                                                                                   |
| Apply Tools Delta Package                   | Enabled when action type is Update Manager.<br>Opens Change Assistant Wizard to lead you through the process to apply a delta change package.<br>See <a href="#">Creating and Applying Tools Delta Package</a>                                                           |
| Apply Translation Delta Package             | Enabled when action type is Update Manager.<br>Opens Change Assistant Wizard to lead you through the process to apply a translation delta change package.<br>See <a href="#">Applying Translations Delta Package</a>                                                     |
| Apply PeopleSoft Release Patchset           | Enabled when action type is Update Manager.<br>Opens Change Assistant Wizard to guide you through applying PeopleSoft release patchset to the PeopleSoft Update Image.<br>See <a href="#">Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image</a> |
| Apply PeopleTools Patch                     | Enabled when action type is Update Manager.<br>Open Change Assistant wizard to guide you through applying a PeopleTools patch.<br>See <a href="#">Using Change Assistant to Apply PeopleTools Patch</a>                                                                  |
| Apply Required for Upgrade Package          | Enabled when action type is Update Manager.<br>See <a href="#">Defining an Upgrade Package</a>                                                                                                                                                                           |
| Upgrade PeopleTools                         | Enabled when action type is Update Manager.<br>Open Change Assistant wizard to guide you through upgrading your database for the new PeopleTools release.<br>See <a href="#">Using Change Assistant to Upgrade PeopleTools</a>                                           |

| Menu Option               | Description                                                                                                                                                                                                                                                             |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Upgrade Application       | Enabled when action type is Update Manager.<br>Open Change Assistant wizard to guide you through upgrading your application for the new application release.<br>See <a href="#">Upgrading Application</a>                                                               |
| Validate                  | Validates the Change Assistant settings for EM Hub to ensure that the required elements are up and running, and that Change Assistant can connect to them.                                                                                                              |
| Export/ Import Settings   | Allows you to export Change Assistant settings to a file and import Change Assistant settings either from another Change Assistant directory or from a backup configuration.<br>See <a href="#">Exporting and Importing Change Assistant Settings</a>                   |
| Migrate PUM Data          | Enabled when action type is Update Manager.<br>Allows you to migrate user metadata (PUM customization Information, test information and package definition information from one PUM Image to a new PUM Image.<br>See <a href="#">Migrating PUM Data</a>                 |
| Merge PeopleCode/SQL/XSLT | Enabled when action type is View PUM Automated Merge Sessions.<br>Allows you to delete the merge session data and the corresponding merged objects.<br>For more details, refer to Retaining Object Merge Data Session in <a href="#">Enabling PUM Automated Merge</a> . |
| Scan Configuration        | Enabled when action type is Apply Updates.<br>Searches the Change Assistant workstation for tools and utilities required to perform updates and upgrades. For example, this process locates the local SQL tool, Data Mover, Application Designer, and so on.            |
| Change Actions            | Opens Change Assistant Wizard Select Action page.<br>See <a href="#">Opening Change Assistant the First Time</a>                                                                                                                                                        |
| Options                   | Opens the Change Assistant Options dialog box, enabling you to select Change Assistant configuration options.                                                                                                                                                           |

## Exporting and Importing Change Assistant Settings

Change Assistant settings can be exported and imported using one of the following processes:

- Exporting Configuration
  - Change Assistant Installer exports configuration when *Retain existing configuration* is selected during the install.  
See [Installing Change Assistant Using Setup.bat](#)

2. User exports configuration manually in Change Assistant GUI.  
See [Exporting Change Assistant Setting in Change Assistant](#)
  3. User exports configurations using Change Assistant command line.  
See [Constructing Command Lines for Configuring Change Assistant](#).
- Importing Configuration
    1. Change Assistant Installer imports configuration when an existing Change Assistant instance is upgraded and *Retain existing configuration* is selected.  
See [Installing Change Assistant Using Setup.bat](#)
    2. User imports configuration using Change Assistant GUI through menu item.  
See [Importing Change Assistant Setting in Change Assistant](#)
    3. User imports configuration to Change Assistant using command line.  
See *PeopleTools Installation* for your database platform: Installing PeopleSoft Change Assistant, Installing PeopleSoft Change Assistant in Silent Mode

Change Assistant settings are exported to configuration backup files. A configuration backup is a zip file. It consists of the following XML files:

- Configuration backup property file (cfgbak\_prop.xml)
- Options file (settings.xml)
- Database definitions backup file (cfgbak\_dblist)

### Configuration Backup Property File

Configuration backup property file (cfgbak\_prop.xml) contains the following content:

- ToolsVersionCA  
The value is the Tools version of Change Assistant which is used to generated this backup file.
- Creator  
The value is *Installer* or *CA*.
- ImportType  
The value is *Auto*, *Confirm*, or *Manual*.
- OptionsIncluded  
The value is true or false.
- DBDefnNum  
The value is the number of database definitions included in the export file.
- DB definition list  
The database list will be used as a pre-check to determine if the database definition already exists in Change Assistant when user imports the configuration.

## Exporting Change Assistant Setting in Change Assistant

Use the Export/Import Change Assistant Setting option to export or import settings.

Navigation:

In Change Assistant, select Tools, Export/Import Change Assistant Settings

or

In Change Assistant, select Tools, Change Actions, Update Manager, Export/Import Change Assistant Settings

This example illustrates the fields and controls on the Export&Import Settings Wizard – Export/Import page to export settings.

**Export/Import**

☒ Export/Import

☒ Export

**Export Settings**

Export to: C:\Settings\casettings.zip

☐ Import

**Import Settings**

☒ Import from other Change Assistant installation

Change Assistant Directory:

☐ Import from configuration backup

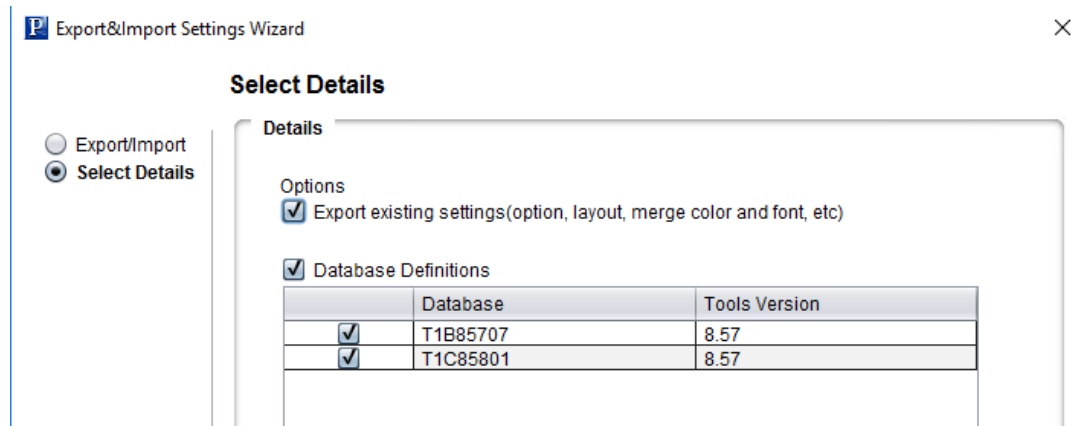
Settings Backup Directory:

## Exporting Change Assistant Settings

To export Change Assistant Settings:

1. In Change Assistant, select Tools, Export/Import Change Assistant Settings.
2. Select the Export radio button.
3. Enter the destination directory and file name.
4. Click Next.
5. On the Select Details page, select if you want to export the settings, as well as the databases.

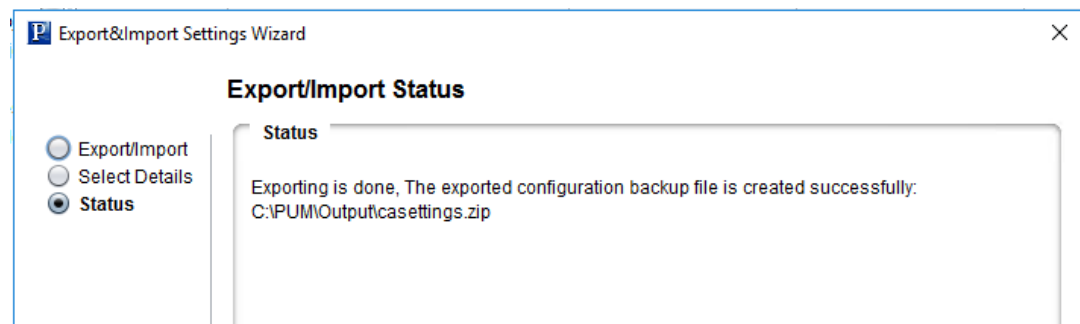
This example illustrates the fields and controls on the Export&Import Settings Wizard – Select Details page. You can find definitions for the fields and controls later on this page.



| Field or Control                                                           | Description                                                                                                                                                               |
|----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Export existing settings(option, layout, merge color and font, etc)</b> | Select this option to export CA settings.                                                                                                                                 |
| <b>Database Definitions</b>                                                | Select this option to export database definitions. When this option is selected, the databases defined in CA will be listed and you can choose which databases to export. |

- Click Next. The status is displayed with the path to the configuration backup file.

This example illustrates the fields and controls on the Export&Import Settings Wizard – Export/Import Status page. You can find definitions for the fields and controls later on this page.



- Click Finish.

## Importing Change Assistant Setting in Change Assistant

Use the Export/Import Change Assistant Setting option to export or import settings.

Navigation:

In Change Assistant, select Tools, Export/Import Change Assistant Settings

or

In Change Assistant, select Tools, Change Actions, Update Manager, Export/Import Change Assistant Settings

This example illustrates the fields and controls on the Export&Import Settings Wizard – Export/Import page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Export&Import Settings Wizard' dialog box. The title bar includes a close button (X) and the text 'Export&Import Settings Wizard'. The main title is 'Export/Import'. On the left, there is a sidebar with a radio button labeled 'Export/Import' which is selected. The main area has two sections: 'Export Settings' and 'Import Settings'. The 'Export Settings' section has a radio button labeled 'Export' and a text field labeled 'Export to:' with a browse button (three dots). The 'Import Settings' section has a radio button labeled 'Import' which is selected. It contains two options: 'Import from other Change Assistant installation' (selected) and 'Import from configuration backup'. The 'Import from other Change Assistant installation' option has a text field labeled 'Change Assistant Directory:' with a browse button (three dots). The 'Import from configuration backup' option has a text field labeled 'Settings Backup Directory:' with a browse button (three dots) and a dropdown menu below it.

### Importing Change Assistant Settings

You can import Change Assistant Settings from either another instance of Change Assistant or from a configuration backup file.

To import Change Assistant settings:

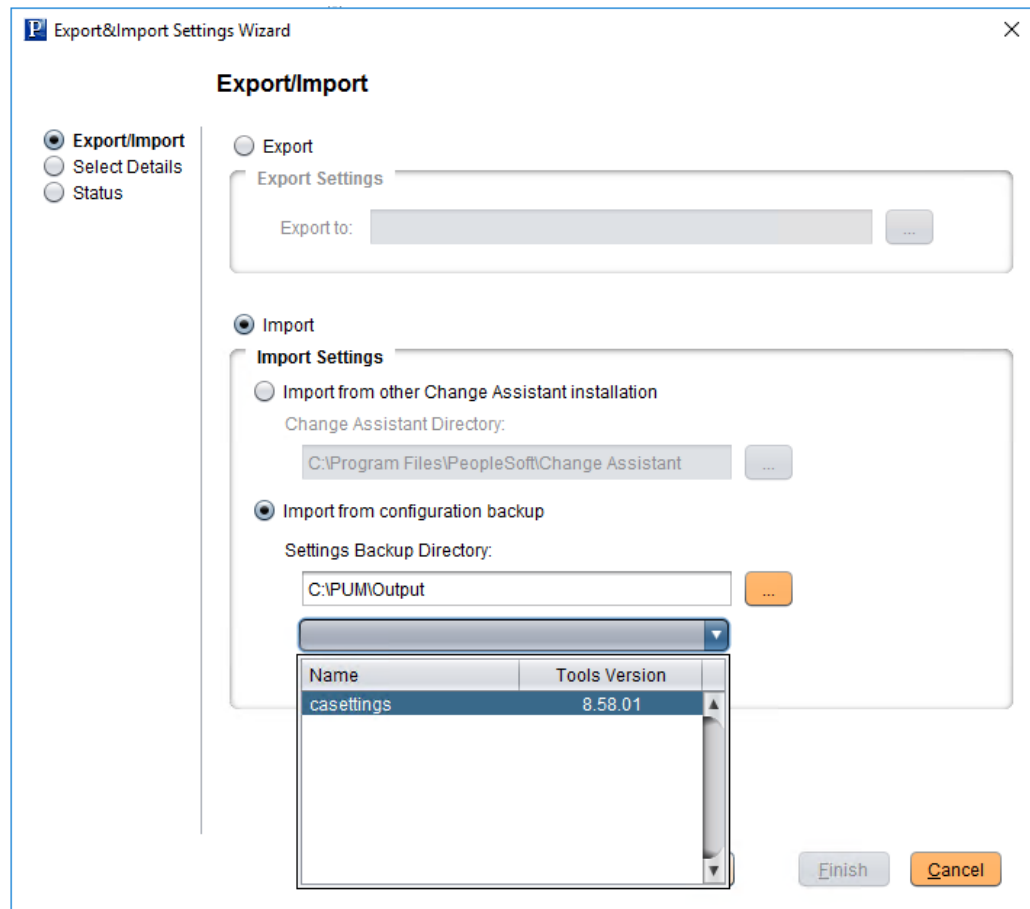
1. In Change Assistant, select Tools, Export/Import Change Assistant Settings.
2. Select the Import radio button.
3. Select the import option to use:
  - Import from other Change Assistant Installation  
Select the Change Assistant directory for the instance.

This example illustrates the fields and controls on the Import from other Change Assistant Installation option.

The screenshot shows the 'Export&Import Settings Wizard' window. On the left, a sidebar has a radio button selected for 'Export/Import'. The main area is titled 'Export/Import' and contains two sections. The 'Export' section is inactive. The 'Import' section is active and contains 'Import Settings'. Under 'Import Settings', the 'Import from other Change Assistant installation' option is selected. It has a text field for 'Change Assistant Directory' containing 'C:\Program Files\PeopleSoft\Change Assistant' and a browse button. Below it, the 'Import from configuration backup' option is unselected. It has a text field for 'Settings Backup Directory' and a browse button.

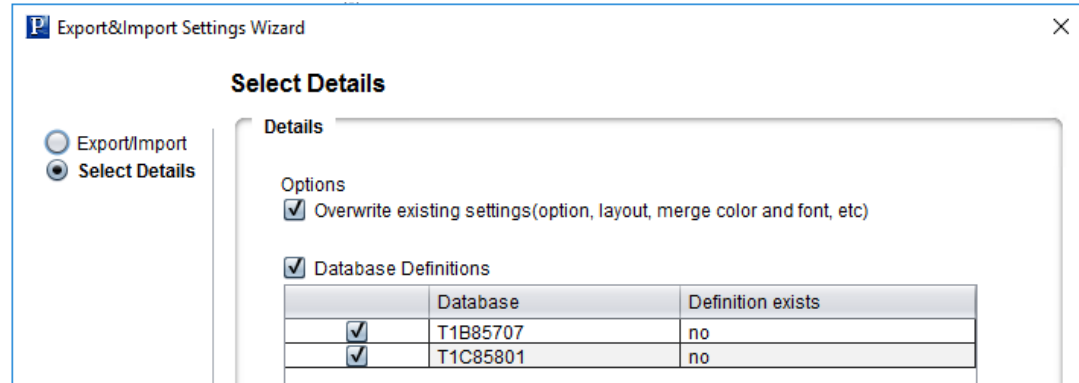
- Import from configuration backup  
Select the directory and file.

This example illustrates the fields and controls on the Import from configuration backup option.



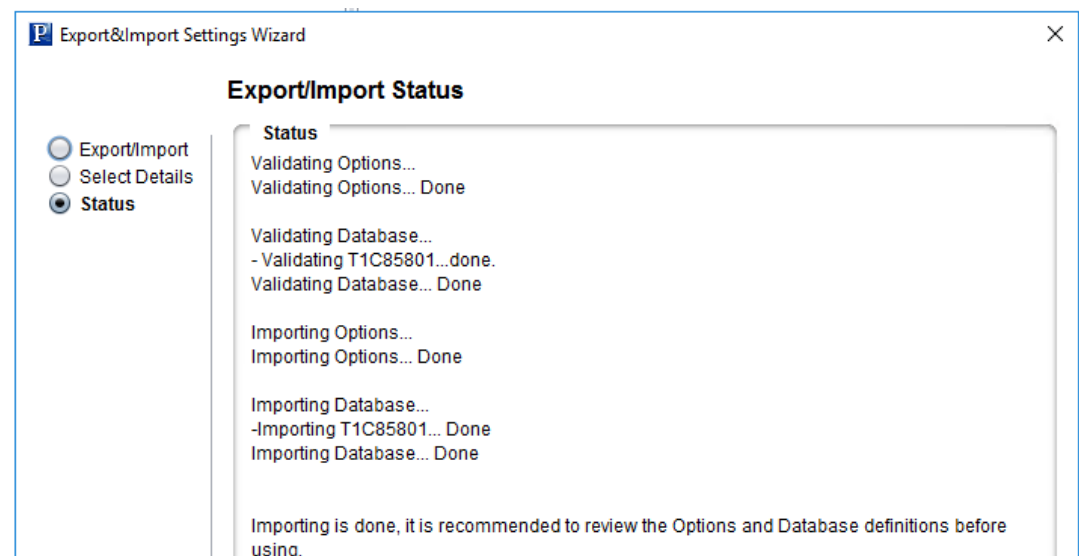
4. Click Next. A progress bar is displayed as Change Assistant retrieves the information.
  - If Import from other Change Assistant installation is selected, Change Assistant will check the Tools version of the selected Change Assistant instance. If the Tools version is available, it will call the selected Change Assistant instance to export the configuration to a temporary folder. The configuration is then retrieved from the temporary configuration backup file.
  - If Import from configuration backup is checked, Change Assistant will retrieve the configuration from the selected configuration backup file.
  - If there is a problem with retrieving the configuration, a warning message is displayed.
5. Click Next. On the Select Details page, select if you want to import the options and which databases you want to import.
  - If settings have already been configured on this instance of Change Assistant, the Overwrite existing settings check box will be cleared.
  - If this instance of Change Assistant has not been configured, the Overwrite existing settings check box is selected.
  - If a database definition already exists in Change Assistant, the check box for the database is cleared.
  - If a database definition does not exist in Change Assistant, the check box for the database is selected.
  - If a database definition is being used in a job, the check box for the database is cleared.

This example illustrates the fields and controls on the Export&Import Settings Wizard-Select Details page where the new instance of Change Assistant does not contain any settings.



6. Click Next. Change Assistant will validate the settings and display the status.

This example illustrates the fields and controls on the Export&Import Settings Wizard-Status page where the new instance of Change Assistant does not contain any settings.



7. Click Finish.

If the validation showed any issues with the options settings, Change Assistant will launch the Options window automatically when you click Finish, in order to make the corrections.

## Migrating PUM Data

Change Assistant provides the ability to migrate metadata from the current PUM Source to the new PUM Source. The following data types can be migrated:

- PUM Customization Information  
See [Using Customization Repository](#)
- Test Information  
See [Using the Test Repository](#)

- Package Definition Information

Package definition information refers to all of the metadata for Change Packages that were created on the PUM Source. Only Created change packages are migrated.

Importing the Change Package definitions into the new PUM Source provides change package history. The change package definitions can be viewed in the new PUM Source, but can not be used to directly create a change package.

- Merge Repository and PUM Automated Updates

### Exporting PUM Data from Current PUM Source

To export PUM data on the current PUM source:

1. From the Change Assistant menu, select Tools, Options, PUM Source.  
Alternatively, select Tools, Change Actions, Update Manager, PUM Source .
2. Click Manage for Migrate Customer Data.
3. Select Export PUM(User) Metadata From Existing PUM Source.
4. Select the current PUM database.
5. Select the metadata to export.  
See [Using PUM Data Migration Page](#)
6. Select the export directory in the Export To field.  
The export file is a data mover DAT file. By default the name is customerdata.DAT.
7. Deselect Import PUM(User) Metadata to New PUM Source.
8. Click Import/Export.  
Change Assistant will check that the database is a PUM Source, if it is not, you will receive an error message.
9. A message is displayed that the export was successful.

### Importing PUM Data into New PUM Source

To import PUM Data from a DAT file into a new PUM Source:

1. Install a new Change Assistant instance for the new Update Image.
2. In the new Change Assistant instance, select Tools, Options, PUM Source.
3. Click Manage for Migrate Customer Data.
4. Deselect Export PUM(User) Metadata From Existing PUM Source.
5. Select Import PUM(User) Metadata to New PUM Source.
6. Either select the new PUM Source database or click the Create button to open the Define Database Wizard and define the database.
7. Select the metadata to export.  
See [Using PUM Data Migration Page](#)
8. Select whether to overwrite existing data or ignore duplicates.
9. Select Specify.
10. In the Import From field select the path and file for the DAT file exported from the old PUM Source.

11. Click Import/Export.

### Migrating PUM Data

If both your old PUM source and new PUM source are available, you can export and import at the same time.

To migrate PUM data:

1. Download and deploy new Update Image.
2. Install Change Assistant from the PS Home that matches the new PUM Source.

#### Note

Change Assistant Settings can be retained from the existing instance of Change Assistant. See [Installing Change Assistant](#)

3. In Change Assistant, configure database definitions for the old PUM source database and the new PUM source database.
4. Select the task Migrate Customer Data from the Tools menu.
5. Select the metadata to import and export.  
See [Using PUM Data Migration Page](#)
6. Click Import/Export.
7. Change Assistant performs a compatibility check.
8. If the compatibility check passes, a Migration Summary report is displayed.
9. Click Finish.

## Using PUM Data Migration Page

In Change Assistant, select Tools, Options, PUM Source tab, then click Manage for Migrate Customer Data.

This example illustrates the fields and controls on the PUM Data Migration page. You can find definitions for the fields and controls later on this page.

**PUM Data Migration** ✕

---

**PUM(User) Metadata from Existing PUM Source**

☒ Export PUM(User) Metadata from existing PUM Source

H92PUMCD Create

**Data Type**

☒ Customization Repository ☒ Merge Repository

☒ Test Repository ☒ PUM Automated Updates

☒ Package Definitions

Export To:  ...

☒ Import PUM(User) Metadata to New PUM Source

H92PUM01 Create

**Data Type**

☒ Customization Repository ☒ Merge Repository

☒ Test Repository ☒ PUM Automated Updates

☒ Package Definitions

☒ Overwrite if exists ☐ Ignore duplicate

**File Type**

☒ Same As Export ☐ Specify

Import From:  ...

Import / Export Cancel

**Field or Control****Description****Export PUM(User) Metadata From Existing PUM Source**

Select to enable the export.

**Database**

Select the old PUM source database.

If the database has not been defined in this instance of Change Assistant, use the Create button to launch the Define Database wizard.

**Customization Repository**

Select to export the customization repository.

**Test Repository**

Select to export the test repository.

**Package Definitions**

Select to export change package definitions.

| Field or Control                                   | Description                                                                                                                                                                                                                                                               |
|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Merge Repository</b>                            | Select to export Merge Repository.<br>You can also export merge session history tables to maintain different versions of customization object in the merge repository. Refer to Retaining Object Merge Data and Session in <a href="#">Enabling PUM Automated Merge</a> . |
| <b>PUM Automated Updates</b>                       | Select to export PUM Automated Update settings and jobs.<br><b>Note:</b> Only applies to PUM Images on PeopleTools 8.59 and above.                                                                                                                                        |
| <b>Export To</b>                                   | Enter the path and file name for the export.                                                                                                                                                                                                                              |
| <b>Import PUM(User) Metadata to New PUM Source</b> | Select to enable import.                                                                                                                                                                                                                                                  |
| <b>Database</b>                                    | Select the new PUM source database.<br>If the database has not been defined in this instance of Change Assistant, use the Create button to launch the Define Database wizard.                                                                                             |
| <b>Customization Repository</b>                    | Select to import customization repository.                                                                                                                                                                                                                                |
| <b>Test Repository</b>                             | Select to import test repository.                                                                                                                                                                                                                                         |
| <b>Package Definition</b>                          | Select to import change package definitions.                                                                                                                                                                                                                              |
| <b>Merge Repository</b>                            | Select to import Merge Repository.<br>You can also import merge session history table to maintain different versions of customization object in the merge repository. Refer to Retaining Object Merge Data and Session in <a href="#">Enabling PUM Automated Merge</a> .  |
| <b>PUM Automated Updates</b>                       | Select to import PUM automated update settings and jobs.                                                                                                                                                                                                                  |
| <b>Overwrite if exists</b>                         | Select to overwrite data if the data already exists.                                                                                                                                                                                                                      |
| <b>Ignore duplicate</b>                            | Select to ignore duplicate data.                                                                                                                                                                                                                                          |
| <b>Same as Export</b>                              | The file specified in the Export To field is used.                                                                                                                                                                                                                        |
| <b>Specify</b>                                     | Select if you have an existing file to import.                                                                                                                                                                                                                            |
| <b>Import From</b>                                 | Enter the path and file name for the import.                                                                                                                                                                                                                              |

## Working with Change Assistant Templates and Jobs

Whether you are performing an update or an upgrade, you work with Change Assistant templates and jobs. The *templates* are composites of all possible steps that apply to an update or upgrade, whether they apply to your environment or not.

The source of the template is dependant on the action you are performing in Change Assistant. This table lists the template source for each Change Assistant action.

| Change Assistant Action | Template                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Apply Update</b>     | Change Assistant template comes in the change package downloaded from MOS.<br>For change packages created in Application Designer, the template is generated when you select Generate New Template.                                                                                                                                                                                                                                                                                                                                             |
| <b>Update Manager</b>   | Change Assistant template is either generated from the change package when you select to apply the change package or delivered from PeopleSoft if you are applying a PeopleSoft Release Patchset (PRP).<br>For PeopleTools patches, the change package is located in PSHOME\PTP directory for the new PeopleTools patch.<br>For PeopleTools upgrades, the change package is located in the PSHOME\PTU directory for the new PeopleTools release.<br>For Upgrade to a New Application Release, the change package is generated in the PUM Image. |

After you specify the required settings in Change Assistant regarding your environment, you use Change Assistant to build a *job* tailored to your environment. When building the job, Change Assistant filters the steps so that the job contains only the steps applicable to your implementation. For example, the resulting Change Assistant job will have only steps that apply to your database type, your installed products, your languages, and so on.

When you apply updates or run an upgrade, Change Assistant automatically loads the template into the Change Assistant internal storage system. You can add additional chapters, tasks, and steps to the template, if needed. In the job, you can not modify steps that have been filtered, however you can modify non-filtered steps, delete or add new steps.

Templates can also be modified from the **Create or Modify Templates** mode, specified on the Change Assistant Options dialog box. If you modify templates using this option, you must import the template from the change package zip file, open and modify the template, then export the template back to the change package zip file.

Examples of custom steps that might be added include, dropping indexes, adding indexes, backing up a database, adding PTF steps, and so on.

#### **Note**

In most cases, it is not necessary (or recommended) to modify a delivered template. Any changes that you make to the imported template won't affect the original template that you downloaded. Any changes made to the template in the initial pass or subsequent pass are exported and added to the updated change package at the end of the apply process and will be used in future applies. However, if you choose to edit a template, keep a backup of the original.

## Creating New Template Elements

You can add chapters, tasks and steps to an existing template.

To insert a template element:

1. Highlight the location where you want to add the element.  
If you want to add a chapter above the existing first chapter in the template, highlight the template root node (template name) at the top of the template tree.
2. From the Edit menu (or toolbar) select the appropriate option: **Insert Chapter**, **Insert Task**, **Insert Step**.
3. Enter a unique name for your new element.

 **Note**

Each chapter in the update template must have a unique name, each task within a chapter must have a unique name, and each step within a task must have a unique name.

4. Click **OK**.  
When creating new steps, Change Assistant displays the Step Properties dialog box for specifying step options.

## Deleting Template Elements

To delete a chapter, task, or step:

1. Highlight the chapter, task, or step that you want to delete.

 **Note**

Press and hold the CTRL key to select multiple steps for deletion.

 **Warning**

If you delete a chapter, Change Assistant deletes all the tasks and steps within the chapter. If you delete a task, Change Assistant deletes all the steps within the task.

2. Select from the following:
  - a. If you want to delete a chapter, select **Edit, Delete Chapter**.
  - b. If you want to delete a task, select **Edit, Delete Task**.
  - c. If you want to delete a step, select **Edit, Delete Step**.
3. Change Assistant deletes the chapter, task, or step and updates the template.
4. **Save** the template.

## Exporting Templates

In order for others to use the template that you create or modify, you need to export it from Change Assistant. If you want to overwrite an existing template file, enter the name of the original template.

To export a template:

1. Open the template in Change Assistant by selecting **File, Open Template**.
2. Select **File, Export Template**.

The Export Template dialog box appears.

3. Navigate to the folder in which you want to save the template.
4. Enter the name of the template.

**Note**

If you want to overwrite the original template that you downloaded, enter the original name of the template.

5. Click **Save**.

## Exporting Jobs to XML, HTML, or Microsoft Excel Format

Change Assistant allows you to export jobs to XML, HTML, or Microsoft Excel file formats.

To export a job:

1. Select **File, Export Job**.
2. Enter the desired exported filename and the select the desired file type format.

You can use this option to enable other implementation team members, who do not have access to the machine on which Change Assistant is running, to view the job. Exporting the job to Microsoft Excel enables you to view the timings in a spreadsheet format.

**Note**

You can not export a Change Assistant job and either import it or open it on another machine with Change Assistant installed and then run or modify the job on that other machine.

## Working with Steps

This section discusses how to:

- Set step properties.
- Set filter queries.
- View step status.

## Setting Step Properties

PeopleSoft delivers update templates with default settings and steps to perform updates. If needed, you can modify the steps, or create new steps, based on the conditions that apply when you run the update process.

To modify the step properties, highlight the step for which you want to modify the step properties, then double-click on the step or select **Edit**, and then **Step Properties**. After making any changes to step properties, click OK, and save your template.

**Note**

Depending on what mode you are in, some of the fields may be disabled.

**Note**

Under normal circumstances, it is recommended that you do not modify or edit the step properties in your delivered template.

This section describes fields and options on the Step Properties dialog box. You can modify step properties for a step when adding or editing steps in the template.

This example illustrates the fields and controls on the Step Properties dialog box. You can find definitions for the fields and controls later on this page.

**Step Properties** ✕

**Step Definition** **Filter Queries**

---

Step Description: Copying Update Project - Part 1 - IP

Script/Procedure: PKG21

Type: CopyFromFile Upgrade

Parameters: #PROJECT=PKG2

From Tools Release: = All

Run Location: Local Products: ... All

Orientation: Target Platforms: ... All

Languages: ... All

**Apply Type:**

- ☒ Initial Pass
- ☐ Subsequent Pass
- ☐ Move To Production

**Allow for Errors:**

- ☐ Yes
- ☒ No

**Run Concurrently:**

- ☐ Yes
- ☒ No

OK Cancel

| Term                      | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Step Description</b>   | This field displays the current step.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Script/Procedure</b>   | <p>Enter the name of the script, procedure, project, or program name to which you want to assign the properties of the step. For example, enter <i>SYSAUDIT</i>.</p> <p>This field is required for all step types except manual stop.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Type</b>               | <p>Select a step type. This selection defines the type of action to be performed by the step. For example, if you are running the SYSAUDIT SQR report, select <i>SQRReport</i>.</p> <p>Detailed information related to each step type appears elsewhere in this PeopleBook.</p> <p>See <a href="#">Step Types</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Parameters</b>         | <p>Enter additional parameters that you may need to run the step. For example, for SQL commands, you enter the actual SQL command in this field. In other cases, you use this edit box to override various environment settings or other parameters so that the step completes successfully.</p> <p>Detailed information related to the parameter options for each step type appears elsewhere in this PeopleBook.</p> <p>See <a href="#">Step Parameters</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>From Tools Release</b> | <p>Specify the PeopleTools releases to which a step applies. Use the associated operator from the drop-down list box to indicate ranges of releases. The default values are <i>All</i> with the = operator.</p> <p>The operator drop-down list box enables you to express greater than, less than, equal to, and 'in' relationships.</p> <p>The <i>in</i> operator enables you to specify more specific ranges, such as 'in' 8.48 and 8.49, as opposed to 'greater than' 8.48. When adding multiple release numbers, separate the values with a comma (.). For example:</p> <p><i>8.48,8.49</i></p> <p><b>Note:</b> If you enter more than one <b>From Tools Release</b> value, the system assumes the 'in' operator.</p> <p>Change Assistant uses these values to filter the steps when creating the upgrade job so that only the steps necessary for a particular environment remain.</p> |
| <b>Run Location</b>       | For Application updates and PeopleTools-only upgrades, steps run locally.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

| Term                    | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Orientation</b>      | <p>Specify which database the step needs to be run against. Options will vary based on the action selected, but may include:</p> <ul style="list-style-type: none"> <li>• <i>Source</i></li> <li>• <i>Target</i></li> <li>• <i>Copy of Current Demo</i></li> <li>• <i>Production</i></li> <li>• <i>Not Applicable</i></li> </ul> <p>Step type and type of upgrade determine valid orientation settings.</p> <p>See <a href="#">Source and Target Databases</a>.</p>                                                                                                                                                                                                                                                                                   |
| <b>Products</b>         | <p>Click the Products icon. Change Assistant displays the Select Products dialog box, which enables you to select the product line, the industry, and the products to which your step should be run against (for example, FIN/SCM, Commercial, Asset Management).</p> <p><b>Note:</b> You must select at least one product.</p>                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Apply Type</b>       | <p>Specify the type of upgrade to which this step applies:</p> <ul style="list-style-type: none"> <li>• <i>Initial Pass</i>: refers to the initial application of a change package a target database.</li> <li>• <i>Subsequent Pass</i> refers to any passes to additional target databases before moving to production.</li> <li>• <i>Move to Production</i>: refers to the application of a change package to your production database.</li> </ul> <p><b>Note:</b> When the job is created, the system filters the template steps to be executed by the apply type specified. For example, if <i>Move to Production</i> is specified as the apply type, only steps in the template specified as Move to Production will be included in the job.</p> |
| <b>Allow for Errors</b> | <p>Indicates how the system should react to any errors that may arise during a step run. If set to <i>Yes</i>, if the step encounters errors the system does not perform any error handling and continues on to the next step.</p> <p>Default is set to <i>No</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Term                    | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Run Concurrently</b> | <p data-bbox="922 247 1425 304">Enables you to set multiple steps (programs, processes, and so on) to run simultaneously.</p> <p data-bbox="922 312 1463 399">If you select this option for two or more consecutive steps, Change Assistant starts those processes concurrently, until the job reaches:</p> <ul data-bbox="922 407 1458 556" style="list-style-type: none"> <li>• a step with Run Concurrently set to <i>No</i>.</li> <li>• a step type of <i>Manual Stop</i>.</li> <li>• the Maximum Concurrent Processes value, as set on the Change Assistant Options dialog box.</li> </ul> <p data-bbox="922 564 1463 760">By setting <b>Run Concurrently</b> to <i>Yes</i>, you are indicating to Change Assistant that this step can run concurrently with the following step. The total number of processes that can run concurrently is determined by the Maximum Concurrent Processes setting on the Change Assistant Options dialog box.</p> <p data-bbox="922 768 1433 854">Some examples are shown here, these examples use 3 AE steps and CA concurrency set to 2:</p> <ul data-bbox="922 863 1089 890" style="list-style-type: none"> <li>• Example 1</li> </ul> <p data-bbox="971 898 1036 926">Steps:</p> <ul data-bbox="971 934 1247 1062" style="list-style-type: none"> <li>– AE1 Concurrent=Yes</li> <li>– AE2 Concurrent=Yes</li> <li>– AE3 Concurrent=No</li> <li>– Manual Stop</li> </ul> <p data-bbox="971 1071 1433 1178">In this example, AE1 and AE2 will run in parallel. When both finish, AE3 will then run. Job will stop when ManualStop is encountered.</p> <ul data-bbox="922 1186 1094 1213" style="list-style-type: none"> <li>• Example 2:</li> </ul> <p data-bbox="971 1222 1036 1249">Steps:</p> <ul data-bbox="971 1257 1247 1386" style="list-style-type: none"> <li>– AE1 Concurrent=Yes</li> <li>– AE2 Concurrent=Yes</li> <li>– AE3 Concurrent=Yes</li> <li>– Manual Stop</li> </ul> <p data-bbox="971 1394 1433 1501">In this example, AE1 and AE2 will run in parallel, when either AE1 or AE2 finish, AE3 will run. Job will stop when ManualStop is encountered.</p> <ul data-bbox="922 1509 1089 1537" style="list-style-type: none"> <li>• Example 3</li> </ul> <p data-bbox="971 1545 1036 1572">Steps:</p> <ul data-bbox="971 1581 1247 1709" style="list-style-type: none"> <li>– AE1 Concurrent=Yes</li> <li>– AE2 Concurrent=Yes</li> <li>– Manual Stop</li> <li>– AE3 Concurrent=No</li> </ul> <p data-bbox="971 1717 1463 1824">In this example, AE1 and AE2 will run in parallel, the job will stop when ManualStop is encountered. AE3 will run after the user completes the ManualStop.</p> <ul data-bbox="922 1833 1089 1860" style="list-style-type: none"> <li>• Example 3</li> </ul> <p data-bbox="971 1869 1036 1896">Steps:</p> <ul data-bbox="971 1904 1247 1932" style="list-style-type: none"> <li>– AE1 Concurrent=Yes</li> </ul> |

| Term | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | <ul style="list-style-type: none"> <li>– AE2 Concurrent=No</li> <li>– AE3 Concurrent=Yes</li> <li>– Manual Stop</li> </ul> <p>In this example, AE1 will run, when AE1 finishes, AE2 will run, when AE2 finishes AE3 will run. Job will stop when ManualStop is encountered.</p> <p>Running steps concurrently is a strategy reserved for application upgrades to save time when running the following step types on Process Scheduler:</p> <ul style="list-style-type: none"> <li>• Application Engine</li> <li>• SQL</li> <li>• Data Mover</li> </ul> <p>Concurrent processing is not enabled in any circumstances for these step types:</p> <ul style="list-style-type: none"> <li>• DBTSFIX</li> <li>• Load Base Data</li> <li>• Upgrade PeopleTools</li> <li>• Manual Stop</li> </ul> <p><b>Note:</b> If a step is dependent on a previous step, it is not recommended to set it to run concurrently with that step.</p> <p><b>Note:</b> Steps set to run concurrently can span across multiple consecutive tasks or chapters, and can be of different step types.</p> <p><b>Note:</b> In an application upgrade, do not run the "Update PeopleTools System Tables" step concurrently, and, unless specifically instructed to do so, do not run any of the steps in the "Apply PeopleTools Changes" chapter concurrently.</p> <p>See the upgrade documentation for your specific upgrade for recommendations on specific steps within that upgrade that can be run concurrently.</p> |

## Setting Filter Queries

Filter queries provide the ability to add ad-hoc step filtering criteria to a template to further improve applicability of job to the customer and where possible remove unnecessary manual steps.

See [Adding Filter Queries](#)

## Viewing Step Status

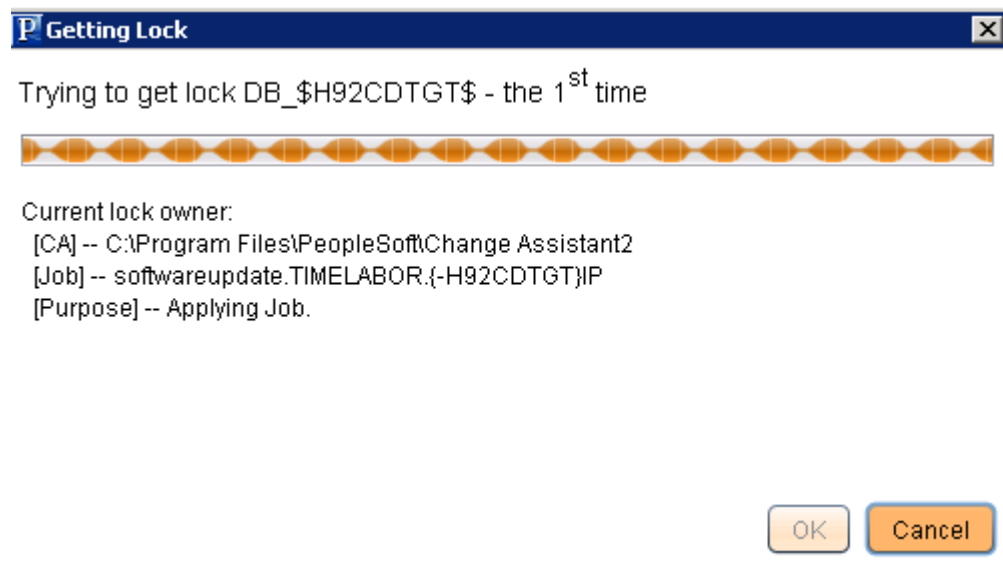
When working with templates and jobs, you see these status icons to the left of steps:

| Term                                                                                                  | Definition                                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Run                 | Indicates that Change Assistant runs this step or process automatically without manual intervention.                                                                                                                                                                                           |
|  Stop                | Indicates that Change Assistant stops on this process. It also indicates that there may be manual steps to perform for this step. Review the documentation window for further instructions. After completing the work described in a manual step, you must set the status to <i>Complete</i> . |
|  Restart             | Indicates a restart process. If a step failed and you corrected the problem, you can set the step to restart from the point of failure.                                                                                                                                                        |
|  Processing          | Indicates that the process is running.                                                                                                                                                                                                                                                         |
|  Failure             | Indicates a failure has occurred that needs immediate attention. This appears if a Data Mover script, SQL script , or project copy step fails. Resolve the error before continuing with processing.                                                                                            |
|  Warning             | Indicates a warning for this step which does not need immediate attention. The job continues processing with no adverse affects. After the job completes, review the steps in a warning state and evaluate for further action.                                                                 |
|  Complete          | Indicates that the step was completed by the system.                                                                                                                                                                                                                                           |
|  Manually Complete | Indicates this step was completed manually.                                                                                                                                                                                                                                                    |
|  Filter            | Indicates this step is filtered at the job level. Steps filtered at the job level will not execute and are equivalent to Complete. To hide these steps, select View, and deselect Steps Filtered at the Job Level.                                                                             |
|  Filter Query      | Indicates this step is filtered by a filter query. Steps filtered by filter query will not execute and are equivalent to Complete. To hide these steps, select View, and deselect Steps Filtered by Filter Query.                                                                              |

## Running Multiple Instances of Change Assistant

Beginning with PeopleTools 8.56 multiple instances of Change Assistant can run in parallel, however you can not run multiple instances against the same target database. This CA functionality is available independent of the Tools Release of the Target Databases, however, some calls on some older Tools Releases do not support parallel processing and therefore locking will occur. If locking occurs, a message will be displayed in Change Assistant showing the lock.

This is an example of a Change Assistant lock message.



## Adding Filter Queries

Filter queries provide the user with the ability to add ad-hoc step filtering criteria to a template in order to improve the applicability of a job to the customer and where possible remove unnecessary manual steps.

## Creating Filter Query Step Type

A template can have 0–n Filter Query steps defined and they can be defined at any position in the template. The location of the filter query step will determine when the filter queries associated to that step will be executed.

This example illustrates the fields and controls on the Step Properties for Type FilterQuery. You can find definitions for the fields and controls later on this page.

Step Properties

Step Definition

Step Description: Running the Initial Filter Queries on the Target

Script/Procedure: Filter0001

Type: FilterQuery

Define Filter Queries

Parameters:

From Tools Release: = All

Run Location: Local

Products: ... All

Orientation: Target

Platforms: ... All

Languages: ... All

**Apply Type:**
☒ Initial Pass
☒ Subsequent Pass
☒ Move To Production

**Allow for Errors:**
☐ Yes
☒ No

**Run Concurrently:**
☐ Yes
☒ No

OK
Cancel

| Field or Control           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Script/Procedure</b>    | <p>The Script/Procedure is defaulted to Filter&lt;n+1&gt; where n is set to 0 for a new template and incremented by 1 each time a Filter Query step type is added and saved.</p> <p>The first Filter Query step created in a template will be named Filter0001, the second will be named Filter0002, and so on.</p> <p>These values must be unique, deletion of a filter query step, will not change the n value. When a filter query step is deleted, the value is never reused within the current template.</p> |
| <b>Define Filter Query</b> | <p>Use this button to access the Define Filter Queries dialog box.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                            |

The following step attributes can be set for Filter Query step type:

- From Tools release
- Orientation
- Products
- Platforms

- Languages
- Apply Type

#### [Setting Step Properties](#)

The following step attributes cannot be changed and will be greyed out.

- Parameters — not required for Query Filter step type
- Run Location (Default = Local)
- Allow for Errors (Default = No)
- Run Concurrently (Default = No)

#### **Note**

A filter query step cannot be filtered by its own query. A filter query step can not be filtered by a filter query defined in another step.

## Defining Filter Queries

The Define Filter Queries page is used to define the actual filter queries. The grid is displayed in read-only mode and always contains a minimum of one row in the view.

- To add a new filter query, right-click and select **Add New Filter Query**.
- To delete an existing filter query, right-click on the row and select **Delete Selected Filter Query**.
- To update an existing filter query either:
  - Right-click on the row and select **Edit Selected Filter Query**.
  - Double click on the row.

### Defining Filter

Use the Filter Definition dialog box to define the filter.

This example illustrates the fields and controls on the Filter Definition dialog box. You can find definitions for the fields and controls later on this page.

Filter Definition



Filter ID:

Database is PeopleTools 8.55.23 or Greater

Description:

used to verify whether Database is on PT855 Patch Level 23 or greater.

☐ System Query

Source Platform = Target Platform

Filename

Filter If True

☒ User Defined

Query Definition:

SELECT COUNT(\*) FROM PS\_MAINTENANCE\_LOG WHERE RELEASELABEL like 'PeopleTools 8.55%' and RELEASELABEL >= 'PeopleTools 8.55.23';

Numeric

>=

1

| Field or Control | Description                                                                                                                                                                                                   |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filter ID        | The Filter ID must be unique within the Filter Query step. The Filter ID value in conjunction with the Script/Procedure name is used to ensure uniqueness within the template. For example: Filter1-AP Check. |
| Description      | Enter a description for the filter query.                                                                                                                                                                     |

| Field or Control            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>System Query</b>         | <p>Select this radio button to use a system queries. System queries include:</p> <ul style="list-style-type: none"> <li>• Source Platform = Target Platform</li> <li>• Source Platform != Target Platform</li> <li>• Database EM Hub Enabled = Yes</li> <li>• Database EM Hub Enabled = No</li> <li>• Unicode Database = Yes</li> <li>• Unicode Database = No</li> <li>• Last Job in Jobset = Yes</li> <li>• Last Job in Jobset = No</li> <li>• Scripts File Exists</li> <li>• Scripts File Does not Exist</li> <li>• SQR File Exists</li> <li>• SQR files Does not Exist</li> <li>• MO Project Exists</li> <li>• MO Project Does not Exist</li> <li>• ADS Project Exists</li> <li>• ADS Project Does not Exist</li> </ul> |
| <b>User Defined</b>         | Select this radio button to type your own query definition.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Query Definition</b>     | <p>Enter the SQL statement for the query.</p> <p>Special filter queries are also available as described in the next section.</p> <p><b>Note:</b> The SQL statement must be a select statement, however the select statement is not validated.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Filter if True Value</b> | <p>The Filter if True Value can be a numeric or a string. Valid operator are:</p> <ul style="list-style-type: none"> <li>• Numeric <ul style="list-style-type: none"> <li>=, &lt;, &gt;, &gt;=, &lt;=, &lt;&gt;</li> </ul> </li> <li>• String <ul style="list-style-type: none"> <li>Contains, Does Not Contain</li> </ul> </li> </ul> <p>For a single filter query, when the <i>Filter if True Value</i> is True then the associated step will be filtered.</p>                                                                                                                                                                                                                                                           |

## Assigning Filter Query to a Step

To use a filter query, the filter query must be assigned to a step. The following rules apply:

- The drop down list of filter queries will be restricted to filter queries that are defined in the template at a position ahead or above the step being updated.
- Steps can only be associated to Filter Queries that would execute prior to the step being executed.
- Steps cannot be associated to the same Filter Query twice.

### Adding a Filter Query to a Step

To add a filter query to a step:

1. Double-click on the step to open the Step properties.

2. Select the Filter Queries tab.

This example illustrates the fields and controls on the Filter Queries dialog box. You can find definitions for the fields and controls later on this page.

Step Properties

Step Definition

Filter Queries

Step will be filtered if:

☒ All Filter Queries listed Return True Values
 ☐ One Filter Query listed Returns True Value

| Filter Name | Filter Identifier     | Description                     |
|-------------|-----------------------|---------------------------------|
| Filter0001  | EM Hub is Not Enabled | Filter if EM Hub is Not Enabled |

| Field or Control                 | Description                                                                                                                                                                                                                          |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Step will be filtered if:</b> | Select when filtering will be done. <ul style="list-style-type: none"> <li>All Filter Queries listed Return True Values AND condition</li> <li>One Filter Query listed returns True value OR condition</li> </ul>                    |
| <b>Filter Name</b>               | Select the Filter name from the drop down list. To add additional filter queries, right-click and select Insert Query.                                                                                                               |
| <b>Filter Identifier</b>         | Select the Filter Identifier from the drop down list. <p><b>Note:</b> The drop down list will contain all of the Filter IDs for the selected Filter Name. This field will be grayed out if a Filter name has not been specified.</p> |

To add additional Filter Queries, right-click on a row and select Insert Query.

Deleting a Filter Query from a Step

To delete a filter query:

1. Double-click on the step to open the Step properties.

2. Select the Filter Queries tab.
3. Right-click on the row with the filter and select Delete Query.
4. Click OK.

## Cutting and Pasting Filter Queries

Once Filter Query Step types have been defined and used as filters for additional steps, you must take care in deleting or moving the steps in the template. Keep in mind the following points:

- Deleting a Filter Query Step

If you delete a Filter Query step from the template, you will receive a warning that the deletion will result in all references to all filters defined in that step will be deleted. If you choose to continue, the process will remove all step references to the deleted **Script/Procedure + Filter ID** values.
- Cutting and pasting a Filter Query Step to another location in the template
  - Pasting to a position above or ahead of the original position has no impact.
  - Pasting to a position below the original position will result in a warning message indicating that moving step will result in removal of references to the current filter query step above it's new position if any exist.

If you choose to continue, the process will remove all step references to the moved **Script/Procedure + Filter ID** values in steps that precede it in the revised template.
- Cutting and pasting a non-filter query step
  - Pasting to a position below the original position has no impact.
  - Pasting to a position above the original position will result in a warning message indicating that moving the step will result in removal of references to filter queries below it's new position if any exist.

If you choose to continue, the process will remove all step references to the impacted **Script/Procedure + Filter ID** values within the relocated step.

## Creating and Executing Jobs that Include Filter Queries

This section discusses how filter queries affect:

- Job Creation
- Job Execution

### Job Creation

At the time of job creation, Filter Query steps can be filtered by any of the standard attributes (such as Platforms) as is the case for any other Step type. The filtering of a Filter Query step in this manner does not invalidate or cause steps that reference the filter query to be filtered.

At job creation all Filter Queries defined within the template will be set to a default value of Null or No Value. No Step will be filtered by an Ad-Hoc Filter Query at job creation, because no Filter queries have been run at that time. The earliest these Filter Queries can be executed is in the first step of the template/job.

### Job Execution

On Filter Query step execution, results are retrieved for all filter query ID's defined within that specific Filter Query step. These results are written to the Change Assistant database.

- The execution accounts for the orientation of the Filter Query step.
- The return values for each Filter Query are noted in the CA log listing the Filter Identifier, Filter ID, the Hide if True Condition, the return value and whether the Hide if True Condition was met.
- In the event of a SQL error, an error message is written to the CA log and the step is marked as *Failed*.
- In the event that the SQL returns a value of the wrong type (numeric as string), an error message is written to the CA log and the step is marked as *Failed*.

Upon completion of this execution, the template is refreshed and as part of this action filtering of steps will occur. Filtering of steps by filter query can only occur where all associated Filter Identifier's have been resolved and are not in the Null or no value state. This is true even when only a single FALSE is required to filter a step. All the filter query results are also written to a log file. Each filter step generates a log file with results named to match the filter value for example filter0001\_out.log.

When a Job is opened or refreshed – the filter query filtering will execute to ensure that all required filtering has occurred. All steps filtered by Filter query are listed in the job.log file.

## Working with Embedded Documentation

Each delivered Change Assistant template comes with embedded documentation to help guide you through an update or upgrade job, especially for manual steps. Typically, full upgrades have significantly more documentation than updates.

The documentation for any chapter, task, or step resides in a separate HTM file with the same name as the template element. For upgrade templates a master HTML file stores the compilation of the separate HTM files displayed in an order matching the template.

When working with Change Assistant documentation, you:

- Set the documentation directory.
- View documentation.
- Create and edit documentation.
- Finalize documentation.

## Setting the Documentation Directory

You set the documentation directory before an upgrade and prior to customizing documentation. The documentation directory contains the documentation HTM files.

To set the documentation directory:

1. Select Edit, Set Documentation Directory.
2. Navigate to the directory where you want to store the documentation.
3. Click Open.

## Viewing the Documentation

To view the embedded documentation associated with a particular template element:

1. Select the template node.
2. View the documentation in the documentation box.

To view the compiled documentation:

1. Navigate to the documentation directory.
2. Open the *template\_name*.HTM file.

## Creating and Editing Documentation

To create or edit documentation:

1. Select the desired element node.
2. Select **Edit**, and then **Edit Documentation**.
3. In the edit box on the Edit Documentation dialog box, insert your cursor, and add new content or modify existing content.

Click Attach to incorporate additional files, such as graphics or additional text files.

Attaching files moves that file into the documentation directory and inserts a link to that file in the embedded documentation.

4. Click OK.

## Finalizing Documentation

After modifying any documentation for individual template elements, select **Edit**, and then **Finalize Documentation** to compile the individual documentation changes into the master HTM file.

## Maintaining Change Assistant Directories

After you download and apply change packages, it's not uncommon for there to be a number of files left in the local Change Assistant directories. This section describes when it's safe to remove the files and what to consider if you want to remove any of the files.

| Directory                           | Maintenance Consideration                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Download                            | <p>Location where the system stores your downloaded bundles and change packages. After the updates have been applied to all environments, you may delete the updates from this directory.</p> <p>This can be advantageous when applying change packages by keeping the list of change packages on the <b>Select Change Packages</b> page of the Apply Change Packages wizard at a manageable length.</p> <p>However, keep in mind that if you delete the updates, and then you need to recreate another environment, you will need to download the update again.</p> |
| Staging                             | <p>A temporary holding place for files needed during the application of a change package. It is safe to delete files in this directory after a change package has been successfully applied to all target databases.</p>                                                                                                                                                                                                                                                                                                                                             |
| Output                              | <p>Contains all the logs related to the processing of a change package. The files in this directory should be kept as long as it is feasible in case problems are detected later. The logs contain valuable information for troubleshooting.</p>                                                                                                                                                                                                                                                                                                                     |
| PeopleSoft Update Manager Directory | <p>This is a network share that maps to the PI_HOME share of the image. Do not delete these files.</p> <p><b>Note:</b> The PI_HOME directory requires read and write access to apply PeopleSoft Release Patchsets (PRPs).</p>                                                                                                                                                                                                                                                                                                                                        |
| PS_HOME\Maint                       | <p>Contains script files and other files that are only required during the application of the change package. It is safe to delete files in this directory after a change package has been successfully applied.</p>                                                                                                                                                                                                                                                                                                                                                 |

# 6

## Running Change Assistant from Command Line

### Running Change Assistant Job from the Command Line

Change Assistant jobs can be run from the command line to automate applying updates to multiple environments. There are 2 modes available AU and UM.

- Update Manager Mode (UM)
- Traditional Apply Updates Mode (AU)

To get command line help:

- Enter `Changeassistant.bat ?` to get a list of the actions.
- To get help on a specific action enter `Changeassistant.bat -MODE UM -ACTION <action>` for example `Changeassistant.bat -MODE UM -ACTION CPAPPLY`.

### Update Manager Mode

Update Manager mode supports the following actions:

- ENVIMP = Import Environment
- ENVCREATE = Create Environment
- ENVUPDATE = Update Environment
- EMFVAL = Validate EMF Settings
- OPTIONS = Set General Options
- UPLDTGT = Upload Target database to PUM Source
- CPAPPLY = Apply Previously Created (non-PRP) Change Package
- CPDEFINE = Define a New Change Package
- PRPAPPLY = Apply PRP
- PTPAPPLY = Apply a patch to your Current PeopleTools Release
- PTUAPPLY = Upgrade to a New Release of PeopleTools
- UPGAPPLY = Apply Application Upgrade
- DLTAPPLY = Apply Tools Delta Package
- TDPAPPLY = Apply Translation Delta Package
- RFUAPPLY = Apply Required for Upgrade Package
- CPCREATE = Create Change Package
- EXPCFG = Export configuration
- IMPCFG = Import configuration

- IMPCUSTDATA = Import customer data from the data file to the new PUM source
- EXPCUSTDATA= Export customer data from existing PUM source and save it as a data file
- UPLDCUSTDATA = Upload customer metadata and test data
- LANGINSTALL = Install language(s) on PUM Source

## Constructing Command Lines for Configuring Change Assistant

Configuring Change Assistant includes the following:

- ENVIMP = Import Environment
- ENVCREATE = Create Environment
- ENVUPDATE = Update Environment
- EMFVAL = Validate EMF Settings
- OPTIONS = Set General Options
- EXPCFG = Export configuration
- IMPCFG = Import configuration
- UPLDTGT = Upload Target Database

### Command Line for Uploading Change Assistant Environments that were Previously Exported

The action ENVIMP is used to import an environment that was previously exported.

Command line format:

```
changeassistant.bat -MODE UM -ACTION ENVIMP -FILEPATH <location of xml file> -
FILE <xml file name> -REPLACE <Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION ENVIMP -INI <path to ini file>
```

| Parameter | Description                                                                     |
|-----------|---------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                       |
| -ACTION   | Action name (Required)<br>ENVIMP = Import Environment                           |
| -FILEPATH | Location of xml file to be uploaded. (Required)<br>Example: -FILEPATH C:\pt8.53 |
| -FILE     | Name of xml file to be uploaded. (Required)]<br>Example: -FILE PT903R1.xml      |

| Parameter | Description                                                                                                                                                                                            |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -REPLACE  | Replace existing data if it exists (Optional) <ul style="list-style-type: none"> <li>Y = Replace existing values if they exist. (default)</li> <li>N = Do not replace values if they exist.</li> </ul> |
| -INI      | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                           |

## Command Line for Creating Environment

The action ENVCREATE is used to create an environment using the command line.

Command line format:

```
changeassistant.bat -MODE UM -ACTION ENVCREATE -TGTENV <target database> -OUT
<log path> -REPLACE <Y or N> -EXONERR <Y or N> -CKYN <Y or N> -CT <database
type> -CS <database server name> -OID <owner ID> -UNI <unicode> -CA <access
id> -CAP <access id password> -CO <user id> -CP <user password> -CI <connect
id> -CW <connect id password> -CZYN <Y or N> -CZ <DB owner> -CZP <DB owner
password> -SQH <path to SQL Query tool> -INP <products> -PL <product line> -
IND <industry> -INL <languages> -INBL <BASE LANGUAGE> -PSH <path to PS Home> -
PAH <path to PS App Home> -PCH <path to PS Cust Home> -SQRF <SQR flags> -NPYN
<Y or N> -NPSH <path to new PS Home> -NPAH <path to new PS App Home> -NPCH
<path to new PS Cust Home> -NSQRF <new SQR Flags>
```

or

```
changeassistant.bat -MODE UM -ACTION ENVCREATE -INI <path to ini file>
```

The parameters for ENVCREATE action are:

| Parameter | Description                                                                                                                                                                                            |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                              |
| -ACTION   | Action name (Required)<br>ENVCREATE = Create Environment                                                                                                                                               |
| -TGTENV   | Name of target database. (Required)                                                                                                                                                                    |
| -OUT      | Path of log file (Optional)<br>If the log directory is not specified it uses the default defined under General Options.                                                                                |
| -REPLACE  | Replace existing data if it exists (Optional) <ul style="list-style-type: none"> <li>Y = Replace existing values if they exist. (default)</li> <li>N = Do not replace values if they exist.</li> </ul> |
| -EXONERR  | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>Y = Do not Launch</li> <li>N = Launch (default)</li> </ul>           |

| Parameter | Description                                                                                                                                                                                                        |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -CKYN     | Validate database connection and retrieve information from database (Optional) <ul style="list-style-type: none"> <li>Y = Validate (by default)</li> <li>N = Do not validate</li> </ul>                            |
| -CT       | Database Type (Required)<br>Database type is a number:<br>1 – DB2 zOS<br>2 – Oracle<br>3 – Informix<br>4 – DB2 LUW<br>6 – Sybase<br>7 – Microsoft SQL Server                                                       |
| -CS       | Database Server Name (Optional)                                                                                                                                                                                    |
| -OID      | Owner ID (Optional)                                                                                                                                                                                                |
| -UDI      | Unicode (Required) <ul style="list-style-type: none"> <li>Y = Yes</li> <li>N = No</li> </ul>                                                                                                                       |
| -CO       | User ID (Required)                                                                                                                                                                                                 |
| -CP       | User Password (Required)                                                                                                                                                                                           |
| -CA       | Access ID (Required)                                                                                                                                                                                               |
| -CAP      | Access Password (Required)                                                                                                                                                                                         |
| -CI       | Connect ID (Required)                                                                                                                                                                                              |
| -CW       | Connect Password (Required)                                                                                                                                                                                        |
| -CZYN     | Set DB Owner Credentials (Optional) <ul style="list-style-type: none"> <li>Y = Yes</li> <li>N = No (default)</li> </ul>                                                                                            |
| -CZ       | DBOwner ID (Required if –CZYN is Y)                                                                                                                                                                                |
| -CZP      | DBOwner Password (Required if –CZYN is Y)                                                                                                                                                                          |
| -SQH      | SQL Query Tool (Required)                                                                                                                                                                                          |
| -INP      | Installed Products (Required)<br>Specify either <i>all</i> , a single or multiple products.<br>For example: <ul style="list-style-type: none"> <li>-INP all</li> <li>-INP FMA</li> <li>-INP FMA.REA,SMA</li> </ul> |
| -PL       | Product Line (Optional)                                                                                                                                                                                            |
| -IND      | Industry (Required)<br>Specify either <i>all</i> , or a specific industry.<br>For example: <ul style="list-style-type: none"> <li>-IND all</li> <li>-IND Commercial</li> </ul>                                     |

| Parameter | Description                                                                                                                                                                       |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -INL      | Languages (Required)<br>Specify either <i>all</i> , or a specific languages.<br>For example: <ul style="list-style-type: none"> <li>• -INL all</li> <li>• -INL ENG,FRA</li> </ul> |
| -INBL     | Base language (Required)                                                                                                                                                          |
| -PSH      | PS Home (Required)                                                                                                                                                                |
| -PAH      | PS App Home (Required)                                                                                                                                                            |
| -PCH      | PS Cust Home (Required)                                                                                                                                                           |
| -SQRF     | SQR Flags (Optional)                                                                                                                                                              |
| -NPYN     | Enable new PS Home (Optional) <ul style="list-style-type: none"> <li>• Y = Yes</li> <li>• N = No (default)</li> </ul>                                                             |
| -NPSH     | New PS Home (Required if -NPSH is Y)                                                                                                                                              |
| -NPAH     | New PS App Home (Required if -NPSH is Y)                                                                                                                                          |
| -NPCH     | New PS Cust Home (Required if -NPSH is Y)                                                                                                                                         |
| -NSQRF    | New SQR Flags (Optional)                                                                                                                                                          |
| -INI      | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                      |

## Command Line for Updating Environment

The action ENVUPDATE is used to set options using the command line.

The command line for updating the environment uses the same parameters as creating an environment (ENVCREATE), except -REPLACE is not included.

## Command Line for Setting Options

The action OPTIONS is used to set options using the command line.

Command line options are available for the General Options, EM Hub Options, and PUM Source Options. Additional options are not supported via command line.

Command line format:

```
changeassistant.bat -MODE UM -ACTION OPTIONS -OUT <path to output log> -
REPLACE <Y or N> -EXONERR <Y or N> -SWP <True or False> -MCP <maximum
concurrent processes> -PSH <path to PS Home> -STG <staging directory> -OD
<output directory> -DL <download directory> -SQH <path to SQL Query tool> -
EMYN <Y or N> -EMH <server host name> -EMP <server host port> -SSL <Y or N> -
KEYSTORE <path to KeyStore file> -KEYSTOREPWD <keystore password> -TRUSTSTORE
<path to TrustStore file> -TRUSTSTOREPWD <truststore password> -EMC <chunk
size> -EMPING <ping interval> -EMDRV <drives to crawl> -SRCYN <Y or N> -
SRCEMV <PUMsource database name> -PUH <PUM PS Home> -PIA <PUM PIA URL>
```

or

```
changeassistant.bat -MODE UM -ACTION OPTIONS -INI <path to ini file>
```

The parameters for OPTIONS action are:

| Parameter    | Description                                                                                                                                                                                                                                        |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE        | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                                          |
| -ACTION      | Action name (Required)<br>OPTIONS = Set General Options                                                                                                                                                                                            |
| -OUT         | Path of log file (Optional)<br>If the log directory is not specified it uses the default defined under General Options.                                                                                                                            |
| -REPLACE     | Replace existing data if it exists (Optional) <ul style="list-style-type: none"> <li>• Y = Replace existing values if they exist. (default)</li> <li>• N = Do not replace values if they exist.</li> </ul>                                         |
| -EXONERR     | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N = Launch (default)</li> </ul>                                                   |
| -SWP         | Show Welcome Menu (Optional) <ul style="list-style-type: none"> <li>• True = Show welcome page</li> <li>• False = Do not show welcome page</li> </ul>                                                                                              |
| -MCP         | Maximum Concurrent Processes (Optional)                                                                                                                                                                                                            |
| -PSH         | PS Home (Optional)                                                                                                                                                                                                                                 |
| -PAH         | PS App Home (Optional)                                                                                                                                                                                                                             |
| -PCH         | PS Cust Home (Optional)                                                                                                                                                                                                                            |
| -STG         | Staging Directory (Optional)                                                                                                                                                                                                                       |
| -OD          | Output Directory (Optional)                                                                                                                                                                                                                        |
| -DL          | Download Directory (Optional)                                                                                                                                                                                                                      |
| -PUH         | PeopleSoft Update Directory (Optional)                                                                                                                                                                                                             |
| -SQH         | SQL Query Tools (Optional)                                                                                                                                                                                                                         |
| -EMYN        | Configure EM Hub for file deploy (Optional) <ul style="list-style-type: none"> <li>• Y = Yes</li> <li>• N = No (default)</li> </ul>                                                                                                                |
| -EMH         | Server Host Name (Required if -EMYN is Y)                                                                                                                                                                                                          |
| -EMP         | Server Host Port (Required if -EMYN is Y)                                                                                                                                                                                                          |
| -SSL         | Connect to EM Hub with HTTP or HTTPS connection.<br>SSL options are: <ul style="list-style-type: none"> <li>• None (Allowed List) (Default)</li> <li>• Server Certificates Only (Allowed List)</li> <li>• Client and Server Certificate</li> </ul> |
| -KEYSTORE    | The path to keystore file                                                                                                                                                                                                                          |
| -KEYSTOREPWD | The keystore password stored in psvault file                                                                                                                                                                                                       |

| Parameter      | Description                                                                                                         |
|----------------|---------------------------------------------------------------------------------------------------------------------|
| -TRUSTSTORE    | The path to truststore file                                                                                         |
| -TRUSTSTOREPWD | The truststore password stored in psvault file                                                                      |
| -EMC           | Chunk Size (Required if -EMYN is Y)                                                                                 |
| -EMPING        | Ping Interval (Required if -EMYN is Y)                                                                              |
| -EMDRV         | Drives to Crawl (Required if -EMYN is Y)                                                                            |
| -SRCYN         | Configure PUM Source (Optional) <ul style="list-style-type: none"> <li>Y = Yes</li> <li>N = No (default)</li> </ul> |
| -SRCENV        | PUM Source Database Name (Required if -SRCYN is Y)                                                                  |
| -PUH           | PUM PS Home Directory (Required if -SRCYN is Y)                                                                     |
| -PIA           | PUM Source PIA URL (Required if -SRCYN is Y)                                                                        |
| -INI           | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                        |

## Command Line to Validate EMF Settings

The action EMFVAL is used to validate EMF using the command line.

### Note

In Linux/UNIX, the user running validating EMF settings should have write permission to PS\_APP\_HOME.

Command line format:

```
changeassistant.bat -MODE UM -ACTION EMFVAL -OUT <path to log file> -EXONERR
<Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION EMFVAL -INI <path to ini file>
```

The parameters for EMFVAL action are:

| Parameter | Description                                               |
|-----------|-----------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager |
| -ACTION   | Action name (Required)<br>EMFVAL = Validate environment   |
| -OUT      | Path to log file. (Optional)                              |

| Parameter | Description                                                                                                                                                                                  |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -EXONERR  | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>Y = Do not Launch</li> <li>N = Launch (default)</li> </ul> |
| -INI      | Path to INI file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                 |

## Command Line to Upload Target Database

The action UPLDTGT is used to a target database using the command line.

Command line format:

```
changeassistant.bat -MODE UM -ACTION UPLDTGT -OUT <path to log file> -
EXONERR <Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION UPLDTGT -INI <path to ini file>
```

The parameters for UPLDTGT action are:

| Parameter | Description                                                                                                                                                                                  |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                    |
| -ACTION   | Action name (Required)<br>UPLDTGT = Upload target database                                                                                                                                   |
| -TGTEENV  | Target database (Required)                                                                                                                                                                   |
| -OUT      | Path to log file. (Optional)                                                                                                                                                                 |
| -EXONERR  | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>Y = Do not Launch</li> <li>N = Launch (default)</li> </ul> |
| -INI      | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                 |

## Constructing Command Line to Install Languages

Use the LANGINSTALL action to install languages in the PUM Source. The following command formats are available:

- Command line format to install languages that exist on a selected target environment.

```
Changeassistant.bat -MODE UM -ACTION LANGINSTALL -TGTEENV <Target Env>
```

- Command line format to install selected languages.

```
Changeassistant.bat -MODE UM -ACTION LANGINSTALL -LANG <Language codes
comma separated>
```

| Parameter | Description                                                                                              |
|-----------|----------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                                                |
| -ACTION   | Action name (Required)<br>LANGINSTALL = Install language                                                 |
| -TGTEENV  | Target environment                                                                                       |
| -LANG     | Language code<br>For multiple languages, use commas to separate the codes.<br>For example: -LANG ESP,FRA |

## Constructing Command Lines for Migrating and Uploading Customer Data

Commands for migrating and uploading customer data include:

- IMPCUSTDATA = Import customer data from the data file to the new PUM source
- EXPCUSTDATA= Export customer data from existing PUM source and save it as a data file
- UPLDCUSTDATA = Upload customer metadata and test data.

This command includes ability to enable or disable object merge.

In order to migrate customer data, you will need to:

1. Export the customer data from the old PUM source database and save it as a data file.
2. Import the customer data from the selected data file to the new PUM source database.

### Command Line to Export Customer Data

The action EXPCUSTDATA is used to export the customer data from the old PUM source Database and save it as a data file.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION EXPCUSTDATA -SRCENV <old PUM DB> -
DATATYPE <type> -DATATYPE <type> -FILEPATH <file path> -FILE <file name>
```

or

```
Changeassistant.bat -MODE UM -ACTION EXPCUSTDATA -INI <path to ini file>
```

The parameters for EXPCUSTDATA action are:

| Parameter | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| -ACTION   | Action name (Required)<br>EXPCUSTDATA = Export the customer data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| -SRCENV   | Name of the old PUM source Database.<br>(Required)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| -DATATYPE | The definition type to export. There are 5 type definitions: Package Definitions, Customization Repository, Test Repository, Merge Repository, and PUM Automated Updates. (Optional) <ul style="list-style-type: none"> <li>• ALL = Select all the types. (default)</li> <li>• PKGDEFN = Export package definitions.</li> <li>• CUSTRPST = Export customization repository</li> <li>• TESTRPST = Export test repository</li> <li>• MERGERPST = Export merge repository.</li> <li>• PAU = Export PUM automated updates.</li> </ul> You can specify multiple data type by separating them by semicolon. For instance - DATATYPE PKGDEFN;CUSTRPST;TESTRPST |
| -FILEPATH | Specify the configuration backup file location. (optional)<br>If the file path is not specified, the Output Directory is used.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| -FILE     | Specify the configuration backup file name. (Optional)<br>If the backup file name is not specified, customerdata.DAT is used.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| -INI      | Path to ini file.<br>See <a href="#">Using Change Assistant to Upgrade PeopleTools</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## Command Line to Import Customer Data

The action IMPCUSTDATA is used to import the customer data from the selected data file to the new PUM source Database.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION IMPCUSTDATA -NEWSRCENV <new PUM DB> -
DATATYPE <type> -FILEPATH <file path> -FILE <file name> -OVERWRITE <Y|N>
```

or

```
Changeassistant.bat -MODE UM -ACTION IMPCUSTDATA -INI <path to ini file>
```

The parameters for IMPCUSTDATA action are:

| Parameter   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| -ACTION     | Action name (Required)<br>IMPCUSTDATA = Import Customer data from the selected data file to the New PUM Source                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| -NEWSRCENV  | Name of the new PUM source Database. (Required)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| -DATATYPE   | The definition type to export. There are 5 type definitions: Package Definitions, Customization Repository, Test Repository, Merge Repository, and PUM Automated Updates. (Optional) <ul style="list-style-type: none"> <li>• ALL = Select all the types. (default)</li> <li>• PKGDEFN = Export package definitions.</li> <li>• CUSTRPST = Export customization repository</li> <li>• TESTRPST = Export test repository</li> <li>• MERGERPST = Export merge repository.</li> <li>• PAU = Export PUM automated updates.</li> </ul> You can specify multiple data type by separating them by semicolon. For instance - DATATYPE PKGDEFN;CUSTRPST;TESTRPST |
| - FILEPATH  | Specify the configuration backup file location. (optional)<br>If the file path is not specified, the Output Directory is used.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| - FILE      | Specify the configuration backup file name. (Optional)<br>If the backup file name is not specified, customerdata.DAT is used.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| - OVERWRITE | Overwrite the Change Package definition if it exists. (Optional) <ul style="list-style-type: none"> <li>• Y = Overwrite if exists.</li> <li>• N = Ignore duplicate. (default)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| -INI        | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## Command Line to Upload Customer Data

The action UPLDCUSTDATA is used to upload customer data to the PUM source Database. This action is also used to enable or disable Object Merge.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION UPLDCUSTDATA -RPSTTYPE <CUST|TEST> -
PRJTYPE <MO|ADS> -PRJFROMDB <DB:project> -MRGOPT <Y|N> -PRJFROMFILE <file
name> -NEWPRJ <DB:project> -REPLACE <Y|N> -ERRORCONTINUE <Y|N>
```

or

```
Changeassistant.bat -MODE UM -ACTION UPLDCUSTDATA -INI <path to ini file>
```

Example command line to upload customization project from H9257P08 database project TEST\_AE\_PC.

```
Changeassistant.bat -MODE UM -ACTION UPLDCUSTDATA -RPSTTYPE CUST -PRJTYPE MO -
PRJFROMDB H9257P08:TEST_AE_PC -REPLACE Y
```

Example command line to upload customization project from H9257P08 database project TEST\_AE\_PC and enable object merge.

```
Changeassistant.bat -MODE UM -ACTION UPLDCUSTDATA -RPSTTYPE CUST -PRJTYPE MO -
PRJFROMDB H9257P08:TEST_AE_PC -REPLACE Y -MRGOPT Y
```

#### Note

This command first updates the merge option in PUM Source database and then uploads the project.

Example command line to enable object merge.

```
Changeassistant.bat -MODE UM -ACTION UPLDCUSTDATA -MRGOPT Y
```

Example command line to disable object merge.

```
Changeassistant.bat -MODE UM -ACTION UPLDCUSTDATA -MRGOPT N
```

The parameters for UPLDCUSTDATA action are:

| Parameter | Description                                                                                                                                                                                                                         |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                           |
| -ACTION   | Action name (Required)<br>UPLDCUSTDATA = Upload customer metadata and test data.                                                                                                                                                    |
| -RPSTTYPE | Target Repository Type (Required) <ul style="list-style-type: none"> <li>• CUST</li> <li>• TEST</li> </ul>                                                                                                                          |
| -PRJTYPE  | Select the customer metadata type (Required) <ul style="list-style-type: none"> <li>• MO = Managed Object Project</li> <li>• ADS = ADS Project</li> </ul> <b>Note:</b> If the repository type is TEST, MO is the only valid option. |

| Parameter      | Description                                                                                                                                                                                                                      |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -PRJFROMDB     | Select Existing Database Project(s)<br>Example: -PRJFROMDB DB1:custprj1;DB2:custprj2<br><b>Note:</b> Use this option if the project exists in the database.                                                                      |
| -MRGOPT        | Enable Object Merge (Optional) <ul style="list-style-type: none"> <li>Y = Enable object merge.</li> <li>N = Disable object merge.</li> </ul>                                                                                     |
| -PRJFROMFILE   | Select Existing Project File(s)<br>Example: -PRJFROMFILE c:/temp/custprj1;c:/temp/custprj2.<br><b>Note:</b> Use this option if the project has been copied to file. This option can't be used with -MRGOPT.                      |
| -NEWPRJ        | Create new database project<br>Example: -NEWPRJ DB1:custprj1                                                                                                                                                                     |
| -REPLACE       | Replace existing data if it exists (Optional) <ul style="list-style-type: none"> <li>Y = Replace Existing Values if they Exist (default)</li> <li>N = Do Not Replace Values if they Exist</li> </ul>                             |
| -ERRORCONTINUE | Proceed with Uploading Customer Data even if errors are found (Optional) <ul style="list-style-type: none"> <li>Y = Proceed with Apply even if Errors found (default)</li> <li>N = Stop apply when Errors encountered</li> </ul> |
| -INI           | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                     |

## Constructing Command Lines to Create and Apply Change Packages

Apply commands include:

- CPDEFINE = Define a New Change Package
- CPAPPLY = Apply Previously Created (non-PRP) Change Package
- PRPAPPLY = Apply PRP
- PTPAPPLY = Apply a patch to your Current PeopleTools Release
- PTUAPPLY = Upgrade to a New Release of PeopleTools
- UPGAPPLY = Application Upgrade
- DLTAPPLY = Apply Tools Delta Package
- TDPAPPLY = Apply Translation Delta Package
- RFUAPPLY = Apply Required for Upgrade Package

When you run the command line, the error codes are as follows:

- 0 = Success
- 1 = Failure
- 2 = Manual Stop encountered
- 3 = Failed to get lock
- 4 = Job completed with warnings

The RESUMEJOB parameter has the following limitations:

- COMPLETECONTINUE cannot be used for a failed Filter Query step  
If the pending job is stopped by a failed Filter Query step, -RESUMEJOB can only have the value of RESTARTCONTINUE or READYTORUNCONTINUE. If the value is COMPLETECONTINUE, an error message is reported.
- RESTARTCONTINUE| READYTORUNCONTINUE cannot be used for a manual stop step.  
If the pending job is stopped by a manual stop step, -RESUMEJOB can only have the value of COMPLETECONTINUE. If the value is RESTARTCONTINUE or READYTORUNCONTINUE, an error message is reported.
- The job must exist in Change Assistant Database in order to use RESUMEJOB.  
If there is no job set in progress when the CA apply command line is run with the parameter - RESUMEJOB, a warning message is reported.
- RESUMEJOB cannot be used when the parameter RESETJOB is Y.  
If there is a job in progress and the -RESETJOB parameters is set as Y or not set (the default value is Y) a warning message is reported as *The resuming job can't be reset.*
- All other parameters need to be consist with the parameters of existing job  
If there is a job in progress but the job parameters are not consistent with the ones in CA apply command line; a warning message is reported as *The pending job can't be resumed by the inconsistent parameter values.*

#### Note

From 8.60, you can create and apply change packages from separate jobs. Earlier defining, creating, and applying change package was executed consecutively in change assistant command line mode in a single job.

## Command Line for Defining a Change Package

You can use the command line to define a change package using a standard system search or a customer saved search.

Command line format:

```
changeassistant.bat -MODE UM -ACTION CPDEFINE -TGTEHV<TARGET ENVIRONMENT> -
UPD <change package> -SEARCHNAME <SYSTEM SEARCH NAME OR CUSTOMER SEARCH NAME>
-PKGDESC <PACKAGE DESCRIPTION> -EXONERR <Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION CPDEFINE -INI <path to ini file>
```

The parameters for CPCREATE action are:

| Parameter   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                                                                                                                                                                                                                                                              |
| -ACTION     | Action name (Required)<br>CPDEFINE =Define Change Package                                                                                                                                                                                                                                                                                                                                                                                                              |
| -TGTEENV    | Target environment (Required)<br>Example: -TGTEENV H92CD540                                                                                                                                                                                                                                                                                                                                                                                                            |
| -UPD        | Update ID of change package. (Required)]<br>Example: -UPD 11111                                                                                                                                                                                                                                                                                                                                                                                                        |
| -SEARCHNAME | Specify the System search name or customer search name. (Required)<br>Available system search names: <ul style="list-style-type: none"> <li>• MMC = All Updates Not Applied</li> <li>• PO = All Critical Updates Not Applied</li> <li>• IP = All Unapplied Updates for Installed Products</li> <li>• POI= All Critical Unapplied Updates for Installed Products</li> <li>• TAX = All Tax Updates Not Applied</li> <li>• TR= All True Requisites Not Applied</li> </ul> |
| -PKGDESC    | Specify a Change Package description. (Optional)                                                                                                                                                                                                                                                                                                                                                                                                                       |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                                                                                                                                                                                                                                                        |
| -INI        | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                                           |

## Command Line for Creating Change Package

The action CPCREATE is used to upgrade to a new PeopleTools release using the command line.

Command line format:

```
changeassistant.bat -MODE UM -ACTION CPCREATE -UPD <change package> -OUT
<path to log file> -EXONERR <Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION CPCREATE -INI <path to ini file>
```

The parameters for CPCREATE action are:

| Parameter | Description                                                                                                                                                                                     |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                       |
| -ACTION   | Action name (Required)<br>CPCREATE =Create Change Package                                                                                                                                       |
| -UPD      | Update ID of change package. (Required)]<br>Example: -UPD PTU854                                                                                                                                |
| -OUT      | Path to log file. (Optional)                                                                                                                                                                    |
| -EXONERR  | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul> |
| -INI      | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                    |

## Command Line for Applying PUM Updates

The action CPAPPLY is used to apply a change package that was created using PUM.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION CPAPPLY -TGTEENV <target database> -UPD
<change package> -TYPE <initial pass or move to production> -SYNCTYPE <y OR
n> -OUT <log file directory> -WARNINGSOK <Yor N> -RESETJOB <Y or N> -EXONERR
<launch GUI Y or N> -RESUMEJOB [COMPLETECONTINUE|RESTARTCONTINUE|
READYTORUNCONTINUE]
```

or

```
Changeassistant.bat -MODE UM -ACTION CPAPPLY -INI <path to ini file>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION CPAPPLY -TGTEENV HC920001 - UPD PKG1
```

In this example the target database is named HC920001 and the change package to apply is PKG1. All of the other parameters will use the default.

| Parameter | Description                                                                                       |
|-----------|---------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant mode (Required)<br>UM                                                            |
| -ACTION   | Change Assistant action (Required)<br>CPAPPLY = Apply Previously Created (non-PRP) Change Package |
| -TGTEENV  | Target database                                                                                   |

| Parameter   | Description                                                                                                                                                                                                                                                                                   |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -UPD        | <p>The Change Package to apply. (Required)</p> <p>Specify either <i>all</i> , a single or multiple Change Packages to apply to the specified environment.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• -UPD all</li> <li>• -UPD PKG1</li> <li>• -UPD PKG1,PKG2</li> </ul> |
| -TYPE       | <p>Apply Type. (Optional)</p> <ul style="list-style-type: none"> <li>• IP = Initial Pass (All steps) (default)</li> <li>• MTP = Move to production</li> <li>• IPSRC = Source only initial pass</li> <li>• IPTGT = Target only initial pass</li> </ul>                                         |
| -SYNCTYPE   | <p>Synchronize target metadata. (Optional)</p> <ul style="list-style-type: none"> <li>• Y = Yes (default if type is IP)</li> <li>• N = No (default if type is not IP)</li> </ul>                                                                                                              |
| -OUT        | <p>Path of log file (Optional)</p> <p>If the log directory is not specified it uses the default defined under General Options.</p>                                                                                                                                                            |
| -WARNINGSOK | <p>Proceed with apply even if warnings are found. (Optional)</p> <ul style="list-style-type: none"> <li>• Y = Proceed with apply even if warnings are found. (default)</li> <li>• N = Stop apply when warnings are encountered.</li> </ul>                                                    |
| -EXONERR    | <p>Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional)</p> <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                                                                        |
| -RESETJOB   | <p>Specify whether or not to reset the job if the job fails the first time it is run.</p> <ul style="list-style-type: none"> <li>• Y = Delete existing job and create a new job</li> <li>• N = Do NOT delete existing job and continue running the existing job. (default)</li> </ul>         |

| Parameter  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -RESUMEJOB | Specify the parameter value: <ul style="list-style-type: none"> <li>• COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETED MANUALLY and continue the job.</li> <li>• RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job.</li> <li>• READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job.</li> <li>• WARNINGSREVIEWED<br/>To retrieve and review the job which stopped with warnings, and then set to status COMPLETED MANUALLY.<br/>This is similar to COMPLETECONTINUE resume option.</li> </ul> |
| -INI       | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying Downloaded PRP to PeopleSoft Update Image

The action PRPAPPLY is used to apply a previously downloaded PRP to the PeopleSoft Update Image.

In order to apply a PRP from the command line, you must run 2 commands, first identify the PUM source using the Options action and then apply the PRP.

1. This is an example of the command line to set the PUM environment.

```
Changeassistant.bat -MODE UM -ACTION OPTIONS -SRCYN Y -SRCENV HR92U016 -
PUH D:\psft\pt\pi_home\ -PIA http://machine.example.com:8000/ps/
signon.html -OUT d:\temp\PRP.LOG -EXONERR Y
```

In this example, Configure PUM Source (SRCYN) is set to Y, the PUM Source database (-SRCENV) is HR92U016, the PI home directory (-PUH) is set to D:\psft\pt\pi\_home\, the PIA URL (-PIA) is set to http://edddr32p1.example.com:8000/ps/signon.html.

See the section on **Command Line for Setting Options** for additional details on setting General Options.

2. This is an example for applying the PRP.

```
changeassistant.bat -MODE UM -ACTION PRPAPPLY -UPD PRJ22534037
```

In this example the change package to apply is PRJ22534037 (name of the downloaded PRP change package). All of the other parameters will use the default.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION PRPAPPLY -UPD <change package> -OUT
<log file directory> -WARNINGSOK <Y or N> -REPLACE <Y or N> -EXONERR
<launch GUI Y or N> -RESETJOB <Y or N>
```

or

```
Changeassistant.bat -MODE UM -ACTION PRPAPPLY -INI <path to ini file>
```

### 3. You can re-apply PRPs using the REPLACE parameter.

If the REPLACE parameter is set to N, then from the given list of PRPs, the PRPs that you applied previously will not be reapplied. Only the PRPs that are not yet applied will be applied in the current run.

This is an example of re-applying PRPs when the REPLACE parameter is N:

```
Changeassistant.bat -MODE UM -ACTION PRPAPPLY -UPD
PRJ34526338_I45;PRJ34513463_I45;PRJ34526732_I45;PRJ34513987_I45 -EXONERR
Y -REPLACE N
```

In this example, you want to re-apply the change packages  
PRJ34526338\_I45;PRJ34513463\_I45;PRJ34526732\_I45;PRJ34513987\_I45.

The command line log displays:

REPLACE parameter is not set. Already applied PRPs will not be re-applied.

If the REPLACE parameter is set to Y, then Change Assistant needs to apply all the PRPs from the given list.

This is an example of re-applying PRPs when REPLACE parameter is Y:

```
Changeassistant.bat -MODE UM -ACTION PRPAPPLY -UPD
PRJ34526338_I45;PRJ34513463_I45;PRJ34526732_I45;PRJ34513987_I45
-EXONERR Y -REPLACE Y
```

The command line log displays:

REPLACE parameter is set. Applied PRPs will be re-applied on PUM source.

| Parameter | Description                                                                                                             |
|-----------|-------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant mode (Required)<br>UM = Update Manager                                                                 |
| -ACTION   | Action name (Required)<br>PRPAPPLY = Apply PRP                                                                          |
| -UPD      | Update ID of Change Package to apply.<br>(Required)                                                                     |
| -OUT      | Path of log file (Optional)<br>If the log directory is not specified it uses the default defined under General Options. |

| Parameter   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -WARNINGSOK | Proceed with apply even if warnings are found. (Optional) <ul style="list-style-type: none"> <li>Y = Proceed with apply even if warnings are found. (default)</li> <li>N = Stop apply when warnings are encountered.</li> </ul>                                                                                                                                                                                                                   |
| -REPLACE    | Replace existing data if it exists (Optional) <ul style="list-style-type: none"> <li>Y = Replace existing values if they exist. (default)</li> <li>N = Do not replace values if they exist</li> </ul>                                                                                                                                                                                                                                             |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>Y = Do not Launch</li> <li>N = Launch (default)</li> </ul>                                                                                                                                                                                                                                                      |
| -RESETJOB   | Specify whether or not to reset the job if the job fails the first time it is run. <ul style="list-style-type: none"> <li>Y = Delete existing job and create a new job</li> <li>N = Do NOT delete existing job and continue running the existing job. (default)</li> </ul>                                                                                                                                                                        |
| -RESUMEJOB  | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -INI        | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying PeopleTools Patch

The action PTPAPPLY is used to apply a PeopleTools Patch using the command line.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION PTPAPPLY -TGTEENV <target database> -UPD
<change package>
```

or

```
Changeassistant.bat -MODE UM -ACTION PTPAPPLY -INI <path to ini file>
```

The parameters for applying a PeopleTools patch are:

| Parameter   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                                                                                                                                                                                                                                         |
| -ACTION     | Action name (Required)<br>PTPAPPLY =Apply PTP                                                                                                                                                                                                                                                                                                                                                                                                     |
| -TGTEENV    | Target environment (Required)                                                                                                                                                                                                                                                                                                                                                                                                                     |
| -UPD        | Update ID of change package. (Required)]<br>Example: -UPD PTP85401                                                                                                                                                                                                                                                                                                                                                                                |
| -OUT        | Path to log file. (Optional)                                                                                                                                                                                                                                                                                                                                                                                                                      |
| -WARNINGSOK | Proceed with apply even if warnings are found. (Optional) <ul style="list-style-type: none"> <li>Y = Proceed with apply even if warnings are found. (default)</li> <li>N = Stop apply when warnings are encountered.</li> </ul>                                                                                                                                                                                                                   |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>Y = Do not Launch</li> <li>N= Launch (default)</li> </ul>                                                                                                                                                                                                                                                       |
| -RESUMEJOB  | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -INI        | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying PeopleTools Upgrade

The action PTUAPPLY is used to upgrade to a new PeopleTools release using the command line.

Command line format:

```
changeassistant.bat -MODE UM -ACTION PTUAPPLY -TGTEENV <target database> -UPD
<change package> -OUT <path to log file> -WARNINGOK <Y or N> -EXONERR <Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION PTUAPPLY -INI <path to ini file>
```

The parameters for PTUAPPLY action are:

| Parameter   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                                                                                                                                                                                                                                         |
| -ACTION     | Action name (Required)<br>PTUAPPLY=Apply PTU                                                                                                                                                                                                                                                                                                                                                                                                      |
| -TGTEENV    | Target environment (Required)                                                                                                                                                                                                                                                                                                                                                                                                                     |
| -UPD        | Update ID of change package. (Required)]<br>Example: -UPD PTU854                                                                                                                                                                                                                                                                                                                                                                                  |
| -OUT        | Path to log file. (Optional)                                                                                                                                                                                                                                                                                                                                                                                                                      |
| -WARNINGSOK | Proceed with apply even if warnings are found. (Optional) <ul style="list-style-type: none"> <li>Y = Proceed with apply even if warnings are found. (default)</li> <li>N = Stop apply when warnings are encountered.</li> </ul>                                                                                                                                                                                                                   |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>Y = Do not Launch</li> <li>N = Launch (default)</li> </ul>                                                                                                                                                                                                                                                      |
| -RESUMEJOB  | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -INI        | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying Application Upgrade

The action UPGAPPLY is used to upgrade to 9.2 application release using the command line.

Command line format:

```
changeassistant.bat -MODE UM -ACTION UPGAPPLY -TGTEENV <target database> -UPD
<change package> -OUT <path to log file> -WARNINGOK <Y or N> -EXONERR <Y or N>
```

or

```
changeassistant.bat -MODE UM -ACTION UPGAPPLY -INI <path to ini file>
```

The parameters for PTUAPPLY action are:

| Parameter   | Description                                                                                                                                                                                                                         |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant Action (Required)<br>UM = Update Manager                                                                                                                                                                           |
| -ACTION     | Action name (Required)<br>UPGAPPLY=Apply PTU                                                                                                                                                                                        |
| -TGTEENV    | Target environment (Required)                                                                                                                                                                                                       |
| -UPGSRV     | Upgrade source environment (Required)                                                                                                                                                                                               |
| -UPD        | Update ID of change package. (Required)]<br>Example: -UPD HCM91TO92UPG                                                                                                                                                              |
| -RFU        | Required for upgrade change package (Optional) <ul style="list-style-type: none"> <li>• Y Yes (apply)</li> <li>• N No(not apply)</li> </ul>                                                                                         |
| -PTU        | PeopleTools upgrade change package (Optional)<br>Example: -PTU PTU856                                                                                                                                                               |
| -TYPE       | Apply Type. (Optional) <ul style="list-style-type: none"> <li>• IP = Initial Pass (All steps) (default)</li> <li>• MTP = Move to production</li> <li>• SP= Subsequent Pass</li> </ul>                                               |
| -SYNCTYPE   | Synchronize Target Metadata (Optional) <ul style="list-style-type: none"> <li>• Y Yes (default if type is IP)</li> <li>• N No(default if type is not IP)</li> </ul>                                                                 |
| -OUT        | Path to log file. (Optional)                                                                                                                                                                                                        |
| -WARNINGSOK | Proceed with apply even if warnings are found. (Optional) <ul style="list-style-type: none"> <li>• Y = Proceed with apply even if warnings are found. (default)</li> <li>• N = Stop apply when warnings are encountered.</li> </ul> |
| -RESETJOB   | Reset Job Set before applying (Optional) <ul style="list-style-type: none"> <li>• RESETJOB Y = Reset Job Set before applying (default)</li> <li>• RESETJOB N = Do Not Reset Job Set before applying</li> </ul>                      |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                     |

| Parameter  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -RESUMEJOB | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -FS        | Specify either the file servers or ini path.<br>File servers hostname#configPath (Optional) <ul style="list-style-type: none"> <li>-FS all (default)</li> <li>-FS &lt;hostname&gt;#c:\pt8.53-102-r1</li> <li>-FS &lt;hostname&gt;#c:\pt8.53-102-r1;<br/>&lt;hostname&gt;#c:\pt8.53-103-r1</li> </ul>                                                                                                                                              |
| -INI       | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying Tools Delta Package

The action DLTAPPLY is used to apply a Tools Delta change package that was created using PUM.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION DLTAPPLY -TGTEENV <target database> -UPD
<change package> -TYPE <initial pass or move to production> -SYNCTYPE <y OR
n> -OUT <log file directory> -WARNINGSOK <Yor N> -RESETJOB <Y or N> -EXONERR
<launch GUI Y or N> -RESUMEJOB [COMPLETECONTINUE|RESTARTCONTINUE|
READYTORUNCONTINUE]
```

or

```
Changeassistant.bat -MODE UM -ACTION DLTAPPLY -INI <path to ini file>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION DLTAPPLY -TGTEENV HC920001 - UPD PKG1
```

In this example the target database is named HC920001 and the change package to apply is PKG1. All of the other parameters will use the default.

| Parameter   | Description                                                                                                                                                                                                                                                                    |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant mode (Required)<br>UM                                                                                                                                                                                                                                         |
| -ACTION     | Change Assistant action (Required)<br>DLTAPPLY = Apply Tools Delta Change Package                                                                                                                                                                                              |
| -TGTEENV    | Target database (Required)<br>Optional if TYPE is IPSRC                                                                                                                                                                                                                        |
| -UPD        | The Change Package to apply. (Required)<br>Specify either <i>all</i> , a single or multiple Change Packages to apply to the specified environment.<br>For example: <ul style="list-style-type: none"> <li>• -UPD all</li> <li>• -UPD PKG1</li> <li>• -UPD PKG1,PKG2</li> </ul> |
| -TYPE       | Apply Type. (Optional) <ul style="list-style-type: none"> <li>• IP = Initial Pass (All steps) (default)</li> <li>• MTP = Move to production</li> <li>• IPSRC = Source only initial pass</li> <li>• IPTGT = Target only initial pass</li> </ul>                                 |
| -SYNCTYPE   | Synchronize target metadata. (Optional) <ul style="list-style-type: none"> <li>• Y = Yes (default if type is IP)</li> <li>• N = No (default if type is not IP)</li> </ul>                                                                                                      |
| -OUT        | Path of log file (Optional)<br>If the log directory is not specified it uses the default defined under General Options.                                                                                                                                                        |
| -WARNINGSOK | Proceed with apply even if warnings are found. (Optional) <ul style="list-style-type: none"> <li>• Y = Proceed with apply even if warnings are found. (default)</li> <li>• N = Stop apply when warnings are encountered.</li> </ul>                                            |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                                                                |
| -RESETJOB   | Specify whether or not to reset the job if the job fails the first time it is run. <ul style="list-style-type: none"> <li>• Y = Delete existing job and create a new job</li> <li>• N = Do NOT delete existing job and continue running the existing job. (default)</li> </ul> |

| Parameter  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -RESUMEJOB | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -FS        | Specify either the file servers or ini path.<br>File servers hostname#configPath (Optional) <ul style="list-style-type: none"> <li>-FS all (default)</li> <li>-FS slc06ejv#c:\pt8.53-102-r1</li> <li>-FS slc06ejv#c:\pt8.53-102-r1;slc08eyu#c:\pt8.53-103-r1</li> </ul>                                                                                                                                                                           |
| -INI       | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying Translation Delta Package

The action DLTAPPLY is used to apply a Tools Delta change package that was created using PUM.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION TDPAPPLY -TGTEENV <target database> -UPD
<change package> -TYPE <initial pass or move to production> -SYNCTYPE <y OR
n> -OUT <log file directory> -WARNINGSOK <Yor N> -RESETJOB <Y or N> -EXONERR
<launch GUI Y or N> -RESUMEJOB [COMPLETECONTINUE|RESTARTCONTINUE|
READYTORUNCONTINUE]
```

or

```
Changeassistant.bat -MODE UM -ACTION TDPAPPLY -INI <path to ini file>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION TDPAPPLY -TGTEENV HC920001 - UPD PKG1
```

In this example the target database is named HC920001 and the change package to apply is PKG1. All of the other parameters will use the default.

| Parameter   | Description                                                                                                                                                                                                                                                                    |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant mode (Required)<br>UM                                                                                                                                                                                                                                         |
| -ACTION     | Change Assistant action (Required)<br>TDPAPPLY = Apply Translation Delta Change Package                                                                                                                                                                                        |
| -TGTEENV    | Target database (Required)<br>Optional if TYPE is IPSRC                                                                                                                                                                                                                        |
| -UPD        | The Change Package to apply. (Required)<br>Specify either <i>all</i> , a single or multiple Change Packages to apply to the specified environment.<br>For example: <ul style="list-style-type: none"> <li>• -UPD all</li> <li>• -UPD PKG1</li> <li>• -UPD PKG1,PKG2</li> </ul> |
| -TYPE       | Apply Type. (Optional) <ul style="list-style-type: none"> <li>• IP = Initial Pass (All steps) (default)</li> <li>• MTP = Move to production</li> <li>• IPSRC = Source only initial pass</li> <li>• IPTGT = Target only initial pass</li> </ul>                                 |
| -SYNCTYPE   | Synchronize target metadata. (Optional) <ul style="list-style-type: none"> <li>• Y = Yes (default if type is IP)</li> <li>• N = No (default if type is not IP)</li> </ul>                                                                                                      |
| -OUT        | Path of log file (Optional)<br>If the log directory is not specified it uses the default defined under General Options.                                                                                                                                                        |
| -WARNINGSOK | Proceed with apply even if warnings are found. (Optional) <ul style="list-style-type: none"> <li>• Y = Proceed with apply even if warnings are found. (default)</li> <li>• N = Stop apply when warnings are encountered.</li> </ul>                                            |
| -EXONERR    | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                                                                |
| -RESETJOB   | Specify whether or not to reset the job if the job fails the first time it is run. <ul style="list-style-type: none"> <li>• Y = Delete existing job and create a new job</li> <li>• N = Do NOT delete existing job and continue running the existing job. (default)</li> </ul> |

| Parameter  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -RESUMEJOB | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -FS        | Specify either the file servers or ini path.<br>File servers hostname#configPath (Optional) <ul style="list-style-type: none"> <li>-FS all (default)</li> <li>-FS slc06ejv#c:\pt8.53-102-r1</li> <li>-FS slc06ejv#c:\pt8.53-102-r1;slc08eyu#c:\pt8.53-103-r1</li> </ul>                                                                                                                                                                           |
| -INI       | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Command Line for Applying Required for Upgrade Package

The action RFUAPPLY is used to apply a Tools Delta change package that was created using PUM.

Command line format:

```
Changeassistant.bat -MODE UM -ACTION RFUAPPLY -TGTEENV <target database> -UPD
<change package> -TYPE <initial pass or move to production> -SYNCTYPE <y OR
n> -OUT <log file directory> -WARNINGSOK <Yor N> -RESETJOB <Y or N> -EXONERR
<launch GUI Y or N> -RESUMEJOB [COMPLETECONTINUE|RESTARTCONTINUE|
READYTORUNCONTINUE]
```

or

```
Changeassistant.bat -MODE UM -ACTION RFUAPPLY -INI <path to ini file>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION RFUAPPLY -TGTEENV HC920001 - UPD PKG1
```

In this example the target database is named HC920001 and the change package to apply is PKG1. All of the other parameters will use the default.

| Parameter   | Description                                                                                                                                                                                                                                                                           |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE       | Change Assistant mode (Required)<br>UM                                                                                                                                                                                                                                                |
| -ACTION     | Change Assistant action (Required)<br>RFUAPPLY = Apply Required for Upgrade<br>Change Package                                                                                                                                                                                         |
| -TGTENV     | Target database (Required)<br>Optional if TYPE is IPSRC                                                                                                                                                                                                                               |
| -UPD        | The Change Package to apply. (Required)<br>Specify either <i>all</i> , a single or multiple Change<br>Packages to apply to the specified environment.<br>For example: <ul style="list-style-type: none"> <li>• -UPD all</li> <li>• -UPD PKG1</li> <li>• -UPD PKG1,PKG2</li> </ul>     |
| -TYPE       | Apply Type. (Optional) <ul style="list-style-type: none"> <li>• IP = Initial Pass (All steps) (default)</li> <li>• MTP = Move to production</li> <li>• IPSRC = Source only initial pass</li> <li>• IPTGT = Target only initial pass</li> </ul>                                        |
| -SYNCTYPE   | Synchronize target metadata. (Optional) <ul style="list-style-type: none"> <li>• Y = Yes (default if type is IP)</li> <li>• N = No (default if type is not IP)</li> </ul>                                                                                                             |
| -OUT        | Path of log file (Optional)<br>If the log directory is not specified it uses the<br>default defined under General Options.                                                                                                                                                            |
| -WARNINGSOK | Proceed with apply even if warnings are found.<br>(Optional) <ul style="list-style-type: none"> <li>• Y = Proceed with apply even if warnings<br/>are found. (default)</li> <li>• N = Stop apply when warnings are<br/>encountered.</li> </ul>                                        |
| -EXONERR    | Specify whether or not to launch GUI if an<br>error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                                                                    |
| -RESETJOB   | Specify whether or not to reset the job if the job<br>fails the first time it is run. <ul style="list-style-type: none"> <li>• Y = Delete existing job and create a new job</li> <li>• N = Do NOT delete existing job and<br/>continue running the existing job. (default)</li> </ul> |

| Parameter  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -RESUMEJOB | Specify the parameter value: <ul style="list-style-type: none"> <li>COMPLETECONTINUE<br/>To mark the first failed step or manual stop step to status COMPLETE and continue the job.</li> <li>RESTARTCONTINUE<br/>To mark the first failed step or manual stop step to status RE-START and continue the job</li> <li>READYTORUNCONTINUE<br/>To mark the first failed step or manual stop step to status READYTORUN and continue the job</li> </ul> |
| -FS        | Specify either the file servers or ini path.<br>File servers hostname#configPath (Optional) <ul style="list-style-type: none"> <li>-FS all (default)</li> <li>-FS slc06ejv#c:\pt8.53-102-r1</li> <li>-FS slc06ejv#c:\pt8.53-102-r1;slc08eyu#c:\pt8.53-103-r1</li> </ul>                                                                                                                                                                           |
| -INI       | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                                                                                                                                                      |

## Constructing Command Line to Apply Traditional Updates (non-PUM-enabled)

CPAPPLY (Apply Change Package) is the only action available for the mode AU (Apply Updates).

### Command Line for Non-PUM Enabled Environments

For Non-PUM enabled environments (PeopleSoft Update Image is not available), use the following command line format:

```
Changeassistant.bat -MODE AU -ACTION CPAPPLY -ENV <target database> - UPD
<change package> -FS <file server> -CA <access id> -CAP <access password> -CO
<user id> -CP <user password> -DL <download directory> -BLD <manual or auto> -
OUT <log file directory> -EXONERR <launch GUI Y or N>
```

or

```
Changeassistant.bat -MODE AU -ACTION CPAPPLY -INI <path to ini file>
```

#### Note

EMF Agent must be running.

The parameters for CPAPPLY action are:

| Parameter | Description                                                                                                                                                                                                                                                                                                              |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -MODE     | Change Assistant Action (Required)<br>AU = Apply Updates                                                                                                                                                                                                                                                                 |
| -ACTION   | Action name (Required)<br>CPAPPLY = Apply Change Package                                                                                                                                                                                                                                                                 |
| -ENV      | Target database. (Required)                                                                                                                                                                                                                                                                                              |
| -UPD      | The Change Package to apply. (Required)<br>Specify either <i>all</i> , a single or multiple Change Packages to apply to the specified environment.<br>For example: <ul style="list-style-type: none"> <li>• -UPD all</li> <li>• -UPD PKG1</li> <li>• -UPD PKG1,upd222222</li> </ul>                                      |
| -FS       | File Server path to apply the Change Package to the specific environment. (Required)<br>Select either <i>all</i> or list a specific file server configuration path in order.<br>For example: <ul style="list-style-type: none"> <li>• -FS all</li> <li>• -FS c:\pt8.53</li> <li>• -FS c:\pt8.53,c:\pt8.53-903</li> </ul> |
| -CA       | Access id for the environment. (Required)                                                                                                                                                                                                                                                                                |
| -CAP      | Access password for the environment. (Required)                                                                                                                                                                                                                                                                          |
| -CO       | User id for the environment. (Required)                                                                                                                                                                                                                                                                                  |
| -CP       | User password for the environment. (Required)                                                                                                                                                                                                                                                                            |
| -DL       | Download directory for the environment. (Optional)<br>If the directory is not specified it uses the default defined under General Options.                                                                                                                                                                               |
| -BLD      | Specify whether to create the Build scripts and execute them automatically or have the DBA run the scripts automatically. (Optional) <ul style="list-style-type: none"> <li>• 0 = Manual</li> <li>• 1 = Automatically (default)</li> </ul>                                                                               |
| -OUT      | Path of log file (Optional)                                                                                                                                                                                                                                                                                              |
| -EXONERR  | Specify whether or not to launch GUI if an error or manual stop is encountered. (Optional) <ul style="list-style-type: none"> <li>• Y = Do not Launch</li> <li>• N= Launch (default)</li> </ul>                                                                                                                          |
| -INI      | Path to ini file.<br>See <a href="#">Using a Configuration File with Changeassistant.bat</a>                                                                                                                                                                                                                             |

# Constructing Command Line to View and Delete Merge Sessions

You can view active merge session details and delete the specified merge session along with the written back version of objects.

This section discusses how to:

- View merge sessions.
- Delete merge sessions.

## View Merge Sessions

You can list or view merge sessions of a configured PUM source database or a specific database environment.

### View Merge Sessions of Configured PUM Source

The GETMRGSESSN action lets you to list or view the merge sessions of all the configured PUM source databases.

Command line format:

```
-MODE UM -ACTION GETMRGSESSN
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION GETMRGSESSN
```

| Parameter | Description                                                           |
|-----------|-----------------------------------------------------------------------|
| -MODE     | Change Assistant mode (Required)<br>UM                                |
| -ACTION   | Change Assistant action (Required)<br>GETMRGSESSN = Get Merge Session |

### View Merge Sessions of Specified Database Environment

When you provide database name along with the GETMRGSESSN action in the command line, Change Assistant lists all the merge sessions of the specified database.

Command line format:

```
MODE UM -ACTION GETMRGSESSN -ENV <DATABASE_NAME>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION GETMRGSESSN -ENV H92143SR
```

| Parameter | Description                            |
|-----------|----------------------------------------|
| -MODE     | Change Assistant mode (Required)<br>UM |

| Parameter | Description                                                           |
|-----------|-----------------------------------------------------------------------|
| -ACTION   | Change Assistant action (Required)<br>GETMRGSESSN = Get Merge Session |
| -ENV      | Specify the database.                                                 |

## Delete Merge Session

You can delete merge sessions from configured PUM source and any specific database.

### Delete Merge Session from Configured PUM Source

The DELMRGSESSN action lets you to delete merge sessions of the configured PUM source database.

Command line format:

```
-MODE UM -ACTION DELMRGSESSN -SESSION <SESSION_NAME>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION DELMRGSESSN -SESSION MRGOBJSQJL
```

Change Assistant queries with the session name and deletes the merge session.

| Parameter | Description                                                              |
|-----------|--------------------------------------------------------------------------|
| -MODE     | Change Assistant mode (Required)<br>UM                                   |
| -ACTION   | Change Assistant action (Required)<br>DELMRGSESSN = Delete Merge Session |
| -SESSION  | Merge session name.                                                      |

### Delete Merge Session from Specified Environment

You can delete merge session from a specific database. When you provide session name and database name, Change Assistant queries for the session in the specified database environment and deletes the session.

Command line format:

```
-MODE UM -ACTION DELMRGSESSN -ENV <DATABASE_NAME> -SESSION <SESSION_NAME>
```

Example command line:

```
Changeassistant.bat -MODE UM -ACTION DELMRGSESSN -ENV H92143SR -SESSION
MRGOBJSQJL
```

| Parameter | Description                                                              |
|-----------|--------------------------------------------------------------------------|
| -MODE     | Change Assistant mode (Required)<br>UM                                   |
| -ACTION   | Change Assistant action (Required)<br>DELMRGSESSN = Delete Merge Session |
| -ENV      | Specify the database.                                                    |
| -SESSION  | Merge session name.                                                      |

Note that DELMRGSESSN and GETMRGSESSN throws error code 1, if:

- no PUM source is configured.
- the specified merge session does not exists.
- the specified database is a lower version than PeopleTools 8.60.

## Using a Configuration File with Changeassistant.bat

You can create a configuration file that contains the parameters and then run the command line using `-INI` parameter which contains the path to the ini file. For example, if you created an ini file named `config.ini` in the `C:\temp` folder, you would run the following command.

```
changeassistant.bat -INI C:\temp\config.ini
```

### Note

For security reasons, the ini file is deleted immediately after CA has loaded the parameters.

The ini file needs to contain the General parameters and the parameters specific to the action.

### Example 6-1 Example ini File for Creating an Environment

```
[GENERAL]
MODE=UM
ACTION=ENVCREATE
OUT=d:\aaa.log
EXONERR=Y

[ENVCREATE]
TGTENV=T2D85501
CT=2
UNI=Y
CA=emdbo
CAP=password
CQ=PTTRN
CP=password
CI=people
CW=password
CZYN=N
SQH=D:\psft\db\oracle-server\12.1.0.2\BIN\sqlplus.exe
```

```
INP=All
PL=PEOPLETOOLS
IND=ALL
INL=All
INBL=ENG
PSH=D:\PT8.55.04_Client_ORA
PAH=D:\PT8.55.04_Client_ORA
PCH=D:\PT8.55.04_Client_ORA
REPLACE=N
```

### **Example 6-2 Example ini File for Creating a Change Package**

```
[GENERAL]
MODE=UM
ACTION=CPCREATE
OUT=d:\CREATEPKG4.log
EXONERR=N

[CPCREATE]
UPD=PKG4
```

# 7

## Understanding Update Manager Action

### Update Manager Action Overview

This section provides an overview of the Update Manager action.

### Understanding Update Tools

This section describes the tools used in applying updates with the PeopleSoft Update Manager (PUM). In a typical update process, you will use these tools to:

1. Locate, download, and install the PeopleSoft Update Image for your PeopleSoft application. This is the PUM Source environment.
2. Set up a Microsoft Windows client with Change Assistant, PeopleTools client and database client utilities for your environment.
3. Enable the Environment Management Framework on the target environment.
4. Configure Change Assistant with information about the source and target environments, and define a new change package.
5. Use the PeopleSoft Update Manager PIA Application to search for updates and create a custom change package.

See [Quick Start](#) for a list of steps and links.

#### PeopleSoft Update Image

PeopleSoft Update Images (PI) are fully functioning instances of the PeopleSoft environment made up of PeopleSoft deployment packages (DPKs). The DPK downloads are available in the following versions:

- NativeOS

This download is for Linux and Windows customers. This download allows you to apply your PeopleSoft Update Image directly to your OS or a virtualization platform without having to use VirtualBox.

- VirtualBox

This download to deploy the PeopleSoft Update Image using a VirtualBox Virtual Machine.

#### Note

You can use PeopleSoft Cloud Manager to automate the creation of PUM source environments and the configuration of target databases. Oracle recommends Cloud Manager as an alternative to VirtualBox to deploy your PUM source environment.

Oracle delivers a complete and current PeopleSoft Update Image on a regular schedule for each PeopleSoft application database instance, for example: FSCM, HCM. The delivery

schedules and the PI will be posted on My Oracle Support (MOS). Customers must download the image and deploy the image locally before they can run Update Manager or create a custom change package.

The most current PeopleSoft Update Image will be delivered on the most current PeopleTools release. It is not necessary to upgrade PeopleTools on your target environment in order to use the current Image. The PeopleSoft Update Image supports multiple releases.

#### Note

It is recommended that customers download PeopleSoft Update Images when they are available, this will avoid the need to do a large download when a current image is needed to resolve a critical production issue.

The [PeopleSoft Update Manager Home Page](#) (My Oracle Support, Document 1641843.2) is the central location for all things related to PeopleSoft Update Manager (PUM) and PeopleSoft Update Images (PIs).

- Hardware and Software Requirements are available from the left-hand side of the PeopleSoft Update Manager Home Page.
- The PeopleSoft Update Image Home Pages tab provides links for you to locate the PeopleSoft Image and additional information for your application.

The Update Image Homepage for your application will contain links to all the relevant information for the PI you are downloading. The Installation Documentation section on the page contains a link to the installation documentation for the Image.

- The Best Practices provides information to help you plan for and determine the maintenance strategy and best practices your organization.

See [Installing PeopleSoft Update Image](#) and [Configuring the Microsoft Windows Client Running Change Assistant](#).

### Change Assistant

Install Change Assistant on the Microsoft Windows client machine. The Update Manager action in Change Assistant is used to:

- Upload Target Database information to the PeopleSoft Update Image, including products and maintenance logs. Once the database information is uploaded, the database will be available in PeopleSoft Update Manager as a target database.
- Define a change package using standard search criteria or previously defined searches.
- Create a custom change package based on the change package definition created in PUM. Since Change Assistant has all of the target database information, this custom change package is automatically filtered for database platform and installed products.
- Apply updates to the target database.
- Create the reconciled or modified change package that can then be applied without compare into all other customized environments, assuming these customized environments are at the same release/patch level.
- Deploy updates to additional target environments using the reconciled change package.
- Update PeopleSoft Update Image with PeopleSoft Release Patchsets (PRP).
- Apply change package for PeopleTools patch.

- Apply change package for new PeopleTools release.
- Apply application upgrade.

See [Opening Change Assistant the First Time](#)

### Environment Management Framework (Optional)

Environment Management Framework (EMF) gathers and publishes configuration and setup information about the file servers, the web servers, the application servers, the individual hosts, and the PeopleSoft Process Scheduler servers that comprise your PeopleSoft system. Change Assistant uses the information gathered by EMF to identify the available target databases when applying updates.

Configuring and running EMF is optional, EMF is only required to automate the file deploy process. If EMF is not configured and running, you will need to deploy files manually when you apply an application update.

See [Configuring the Environment Management Hub](#)

### PeopleSoft Update Manager PIA Application

The PeopleSoft Update Manager PIA application runs on the PeopleSoft Update Image (PI) virtual machine. The Update Manager Dashboard provides pivot grids to determine the current status of your target databases and also provides folders with links to the Update Manager pages. The Define Change Package folder contains links to wizards that will lead you through the process of selecting updates and defining custom change packages for your environment. It provides a wide array of search options for selecting the updates to apply to your environment. It lets you review the details of the changes for each update before creating the change package definition, shows you what has already been applied to your environment, and automatically includes requisite updates based on what you selected and what is already applied to your environment.

Once the Target information has been uploaded to the PI, you can directly signon to the PI at any time to search for updates and create change package definitions without using Change Assistant. However, when you access Update Manager PIA application directly, the maintenance log details of that target will not be updated. Target database details are updated when:

- The task Upload Target Database Information to PUM Source is run.
- The step *SyncDatabaseInfoToPUMSource* in the change package template is executed.

#### Note

This step is included in the change package if the option Synchronize Target Metadata (Requires Source) is selected on the Change Package Settings page when applying the update.

Change Assistant is updated when:

- The database is defined.
- The step *SyncDatabaseInfoToCA* in the change package template is executed.

When you are ready to create and apply the change package, the change package definition will be available from Change Assistant.

# Understanding Update Manager Action

Update Manager Action includes the following actions:

## Validate Change Assistant EMF Settings

EMF is used with the Update Manager action to identify the file servers for your target environment. If you configured the EM Hub option for your environment, use this to validate the EMF settings.

## Upload Target Database Information to PUM Source

The Upload Target Database Information to PUM Source is used to upload the target database information to the PeopleSoft Update Image, including products and maintenance logs. Once the database information is uploaded, the database will be available in PeopleSoft Update Manager as a target database.

### Note

In previous releases of Change Assistant, the target information was uploaded to the PUM source when you were creating a new change package in Change Assistant or when the *PUMMaintenanceLogSync* step was executed in Change Assistant. The *PUMMaintenanceLogSync* step has been replaced by the steps *SyncDatabaseInfoToPUMSource* and *SyncDatabaseInfoToCA*.

## Define Change Package

The Define Change Package option provides 2 options for defining a Change Package.

1. Use the link provided to open a browser session to the PeopleSoft Update Image database (PUM source). Define change package definition using PeopleSoft Update Manager PIA application on the PeopleSoft Update Image.
2. Use a standard or saved search to create the change package in Change Assistant.

See [Defining Change Package](#)

## Create Change Package

The Create Change Package option is used to:

- Create the change package in Change Assistant.
- Apply the change package to the target database.

See [Creating Change Package](#)

## Apply Change Package

The Apply Change Package option is used to:

- Apply the custom change package to a target environment.
- Apply custom change package to additional target environments.

See [Applying Change Package](#)

### **Apply Translation Delta Package**

The Apply Translation Delta Package option is used to:

- Apply translation delta package to a target environment.
- Apply translation delta package to additional target environments.

See [Applying Translations Delta Package](#)

### **Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image**

The Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image is used to apply PeopleSoft Release Patches (PRP) to the PeopleSoft Update Image.

See [Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image](#)

### **Upgrade to New Application Release**

The Upgrade to New Application Release is used to upgrade to application 9.2.

### **Apply a Patch to Your Current PeopleTools Release**

PeopleTools patches deliver fixes between PeopleTools minor releases. PeopleTools patches are posted to My Oracle Support, as they become available. PeopleTools patches are cumulative. They include all fixes from all previous patches for the specified release.

A PeopleTools patch contains the PeopleTools binaries and database changes. The database changes are delivered in a change package located in the PS\_HOME\PTP directory. The Apply a Patch to Your Current PeopleTools Release option is used to apply this change package.

### **Upgrade to a New Release of PeopleTools**

A PeopleTools upgrade consists of the new PeopleTools release and PeopleTools upgrade change package that contains all the database changes. After installing the new release and downloading the upgrade change package, this option is used to apply the upgrade change package.

### **Apply Tools Delta Package**

The Apply Tools Delta Package option is used to:

- Apply the tools delta package to a target environment.
- Apply the tools delta package to additional target environments.

See [Creating and Applying Tools Delta Package](#)

# 8

## Setting Up the Client, Source, and Target Environments

### Installing PeopleSoft Update Image

To prepare your environment, you must install the PeopleSoft Update Image and configure the client machine that runs PeopleSoft Change Assistant to communicate with the PI.

To install the PeopleSoft Update Image see *PeopleSoft Deployment Packages for Update Images Installation (PeopleSoft PeopleTools 8.5x)*

### Configuring the Microsoft Windows Client Running Change Assistant

Change Assistant needs to be run from a Microsoft Windows client. It is highly recommended that you dedicate a Microsoft Windows client machine that is not used for other PeopleSoft purposes for each PeopleSoft Update Image (PI). It is necessary to configure this Microsoft Windows client machine to access your target environment, as well as the PI. This setup is necessary for Change Assistant to communicate with the PI and target databases in 2-tier mode in order to correctly install updates.

In setting up the Microsoft Windows client, be sure to review the software versions listed on the My Oracle Support home page for the PI you are using, as these will impact your setup.

#### Note

This documentation uses "release/patch" to refer to the PeopleSoft PeopleTools release, for example, 8.54, and patch number, for example 06. This release/patch example is written as 8.54.06.

The Microsoft Windows client needs to include:

- Oracle Database Client at a version level that is certified for the PeopleSoft PeopleTools release included on the PI.  
See My Oracle Support, Certifications
- Database Client for target database platform (if the target RDBMS is not Oracle).
  - For a target database that is not Oracle, you must always install the database client for your database platform.
  - For a target database that is Oracle, it may be necessary to install a second Oracle Database Client if the target database is not at the same PeopleTools release level as the PI.

For example, PeopleTools 8.53 uses a 32-bit client and PeopleTools 8.54 requires a 64-bit client.

- PeopleTools Client for Oracle database platform at the same version level of the PI.

**Note**

The PeopleTools client will work with all your target databases that are on the same PeopleTools release as the PI in carrying out PUM-enabled maintenance as long as the PeopleTools client is installed from the tools\_client shared drive. If your target database is on a different PeopleTools release, you will need to install a second PeopleTools Client for that PeopleTools release.

- PeopleTools Client for target database platform at a version level supported by the PI.

**Note**

The supported PeopleTools client installer is available in the tools\_client share. It is not necessary to upgrade the target database to the supported PeopleTools release patch level. The target database will work with the PeopleTools client.

- Change Assistant installed from the *PS\_HOME* directory for the PeopleSoft Update Image on the Microsoft Windows client. However if the target database is at a higher release level than the PeopleSoft Image, then the latest tools version must be used to install Change Assistant. For example, the customer upgrades the target database to 8.56 and the latest PeopleSoft Image is still on 8.55, the customer must use Change Assistant 8.56 to apply updates.

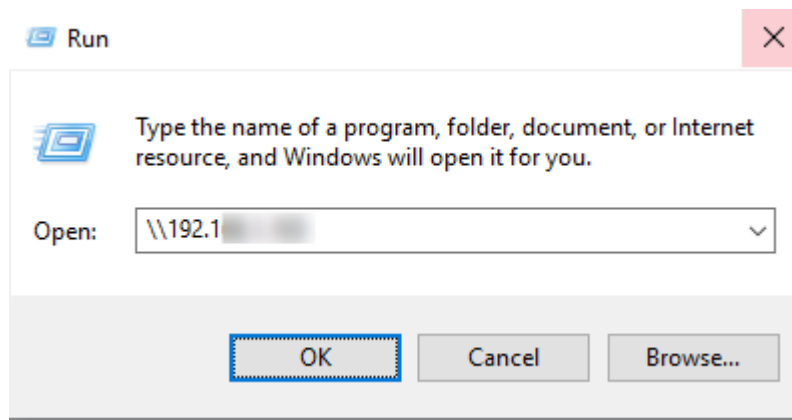
**Note**

This use of *PS\_HOME* refers to the location created by the client installation. You may need more than one client *PS\_HOME* location, when you configure the Microsoft Windows Client. This documentation also uses "PS Home" in some cases to match the syntax on the Change Assistant UI.

After you install and initialize the PI, you access a shared drive which makes the folders from the image accessible to the host (Microsoft Window OS).

From Windows Explorer access the virtual appliance file system from your Microsoft Windows host by selecting Start, Run, and entering the Microsoft Windows UNC path containing your virtual machine IP address.

This example illustrates the fields and controls on the Microsoft Windows Run dialog box with IP address.



The shared drive includes 3 folders:

The `<product>_pi_home` folder contains all files needed for patching.

The `<product>_app_home` folder contains the application home for the PUM source.

The tools-client folder includes the following:

- client-858  
The client-858 folder includes a Readme file, a manifest with version information, archives, and scripts for deployment of the PeopleSoft PeopleTools 8.58 client home folder.
- client-859  
The client-859 folder includes a Readme file, a manifest with version information, archives, and scripts for deployment of the PeopleSoft PeopleTools 8.59 client home folder.
- client-860  
The client-860 folder includes a Readme file, a manifest with version information, archives, and scripts for deployment of the PeopleSoft PeopleTools 8.60 client home folder.
- oracle-client  
The oracle-client folder includes a Readme file, a manifest with version information, archives, and scripts for deployment of the Oracle 19c database client home folder.
- SetupPTClient.bat — Interactive script that installs the PeopleSoft PeopleTools components such as Application Designer and Change Assistant.  
You supply information such as the PeopleSoft PeopleTools release and the RDBMS platform.
- source.properties — A text file that includes information required for the setup. Do not edit this file. The information is supplied by the setup scripts.
- tnsnames.ora — Oracle database connectivity file. The file includes the information for the source (PI) database.

## Configuring the Microsoft Windows Client Configuration

You will use the SetupPTClient.bat file to configure the client. When you run the setup script, you will be prompted for information about your environment.

For detailed information on the setting up the client, see *PeopleSoft PeopleTools Deployment Packages Installation*.

The script uses the information you supplied and carries out the following validations and deployments:

- Oracle 19c database client for the Update Image source database (PI). The setup process determines whether a 64-bit Oracle 19c database client is present on the Microsoft Windows client machine for connectivity to the source database. If not, the setup process installs it.
- PeopleSoft PeopleTool 8.59 and 8.60 require 64-bit Oracle 19c. PeopleSoft PeopleTools 8.58, 8.57, 8.56, 8.55, and 8.54 require a 64-bit Oracle 12c Database Client installation. PeopleSoft PeopleTools 8.53 requires the 32-bit Oracle 12c database client.
- PeopleSoft PeopleTools Client for the source (PI). The source client tools are installed in C:\Peoplesoft\PSHOME\Client<release\_number>, where <release\_number> refers to the PeopleSoft PeopleTools release and patch, such as 8.58.03.
- PeopleSoft PeopleTools Client for the target. The target client tools are installed in C:\Peoplesoft\PSHOME\Client<release\_number>, where <release\_number> refers to the PeopleSoft PeopleTools release and patch, such as 8.57.14.
- Change Assistant installation Change Assistant is installed in C:\Program Files\Peoplesoft\Change Assistant. If there is an earlier Change Assistant installation on the machine, the setup script removes it.

## Understanding the Microsoft Windows Client Configuration

After running the SetupPTClient, you will need to update the tnsnames.ora file located in your oracle\_home directory with the tnsnames entry from the tools\_client folder. If your target database is also Oracle, you will also need to add the target databases tnsnames entry. To update the tnsnames.ora file:

1. Open the tnsnames.ora file in the tools\_client directory.
2. Copy the entry in the tnsnames.ora file to the tnsnames.ora file located in your oracle\_home directory.

Depending on your installation, the location of the tnsnames.ora file in the oracle\_home directory will vary. If you installed the oracle client using SetupPTClient, the tnsnames.ora file is located in oracle\_home\network\admin\tnsnames.ora; for example:  
C:\oracle\product\12.1.0\client\_1\network\admin\tnsnames.ora:

3. If your target database is on Oracle, copy the tnsnames entry for your target database into the tnsnames.ora file.

The location of the tnsnames.ora file will vary depending on the Windows client installation. If SetupPTClient detects an existing Oracle DB Client 12c with 64-bit installation, it will use that version of Oracle Database, if SetupPTClient needs to install the DB Client 12c, the default location is: C:\oracle\product\12.1.0\client\_1.

The tnsnames entry for your target databases must use the SERVICE\_NAME in order for your PeopleTools or Change Assistant clients to connect to the PUM source database within the 12c database server. This is an example of the entry:

```
PT855GA1 =
 (DESCRIPTION =
 (ADDRESS = (PROTOCOL = TCP)(HOST = hostname.domain)(PORT = 1521))
 (CONNECT_DATA =
 (SERVER = DEDICATED)
 (SERVICE_NAME = PT855GA1)
```

)  
)

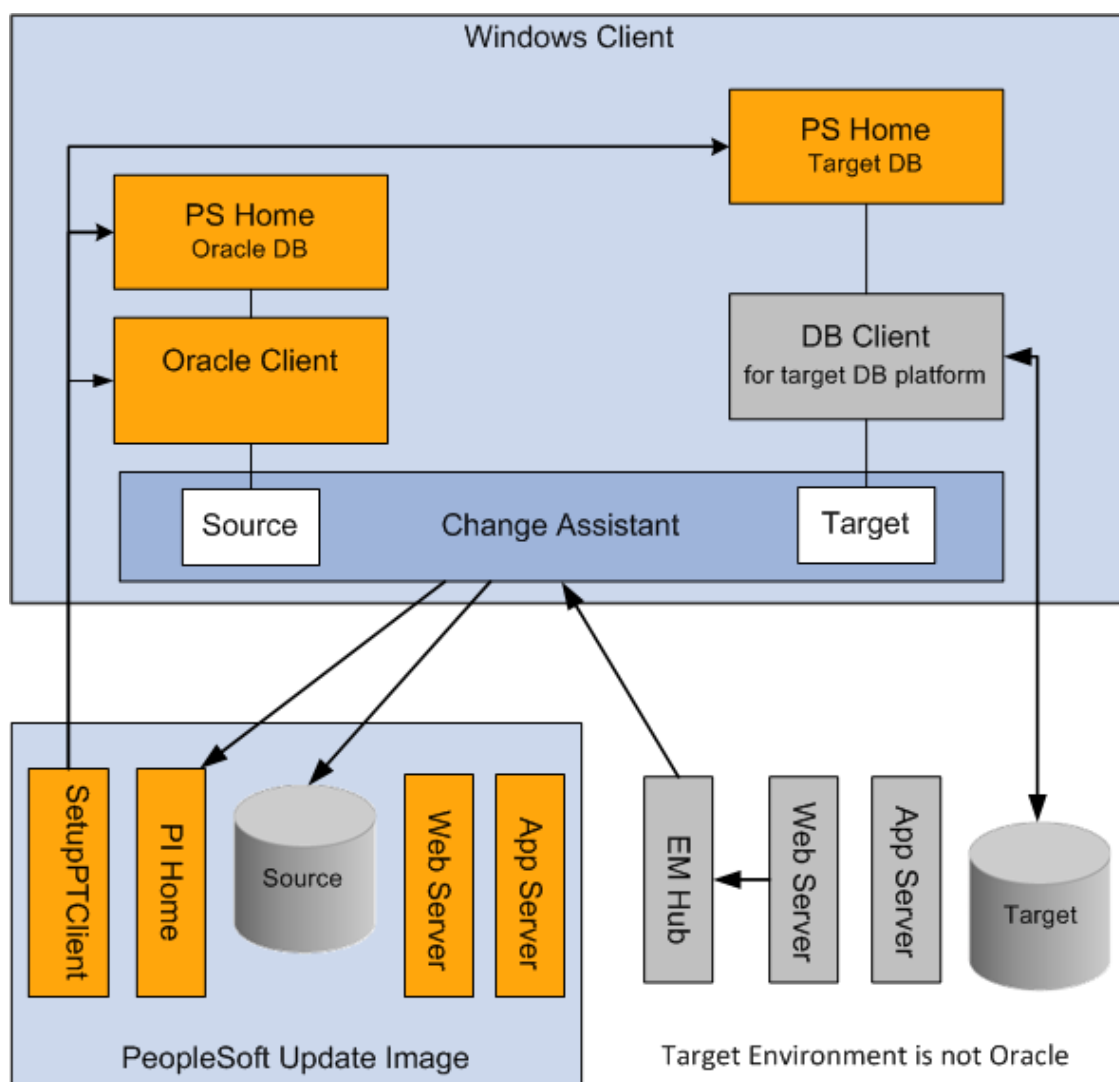
4. Save the file.

## Microsoft Windows Client Configuration

This table describes the Microsoft Windows client installs and when it needs to be installed.

| Microsoft Windows Client machine install                            | When you need this install                                                                                                                                                           |
|---------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Oracle database 64-bit client                                       | Always install for PUM source.                                                                                                                                                       |
| Enter the tnsnames entry into the tnsnames.ora file                 | Always enter tnsnames entry for PUM source database.<br>If target database is on Oracle enter the tnsnames entry for the target database.                                            |
| PeopleTools 8.60 client                                             | Always install for PUM source.                                                                                                                                                       |
| PeopleTools 8.53 through 8.58                                       | Install the PeopleTools client that matches the target environment.<br><b>Note:</b> If your target database is on a different release than the PUM source, you will have 2 PS homes. |
| Oracle database 32-bit client                                       | Required if target environment is on PeopleTools 8.53.                                                                                                                               |
| Target database client environment<br>Set up database connectivity. | Required if target environment is not on Oracle.                                                                                                                                     |

This diagram illustrates the relationship between the Microsoft Windows client running Change Assistant and the PI when your target database is not Oracle.



When the target environment is not on Oracle database, you will always have 2 PS Homes and 2 database clients (one for Oracle and one for the target database platform). The PS Home for the PUM Source database will be on PeopleTools 8.60 and the Target PS Home will be on the same release as the target database.

# 9

## Using Update Manager Action

### Selecting Update Manager Action

The Update Manager action is used to selectively apply updates (bug fixes, patches, enhancements or new features) to your system. Before you can select this action, the following prerequisites must be configured and installed.

1. Download the latest PeopleSoft Update Image (PI) from My Oracle Support and install it locally.

See [PeopleSoft Update Manager Home Page \[ID 1641843.2\]](#)

2. Configure the Microsoft Windows Client running Change Assistant.

See [Installing PeopleSoft Update Image](#) and [Configuring the Microsoft Windows Client Running Change Assistant](#)

### Setting Up Target Environment

To set up the target environment:

- Configure the Environment Management Framework (EMF) for your environment. (Optional)

EMF is required for the file deploy feature. This feature will automatically deploy files in change packages to different servers.

#### Note

If Environment Management Framework is not configured, the file deploy steps will be excluded from the change package and any files included in the change package will require manual deployment.

Change Assistant 8.58 and later is compatible with EMF on all releases.

See [Configuring an Environment Management Agent](#)

- Start the EMF Agent on the target environment.

To verify that the EMF Agent is running, enter the hubURL into a browser. You should see a window with a message similar to this: "Sending pulse from 'com.peoplesoft.emf.peer: id 1'"

See [Running an Environment Management Agent](#)

- Set user ID access.

In Change Assistant, the user ID for the target database needs to have Full data admin access defined for Build/Data Admin on the Tools Permissions page for PeopleTools on one of the assigned permission lists. With the Full data admin access permission assigned, Change Assistant has access to all the build and copy options. Application Data Set (ADS)

objects represent another security issue, because they contain actual rows of application data and there may be instances where this data is not suitable for compare or copy. In order to compare and copy ADS definitions, the user ID must have Full Access to compare and copy defined on the Copy Compare Permissions page for Data Migration on one of the assigned permission lists.

See Security Administration: Setting PeopleTools Permissions and Lifecycle Management Guide: Setting Data Migration Permissions.

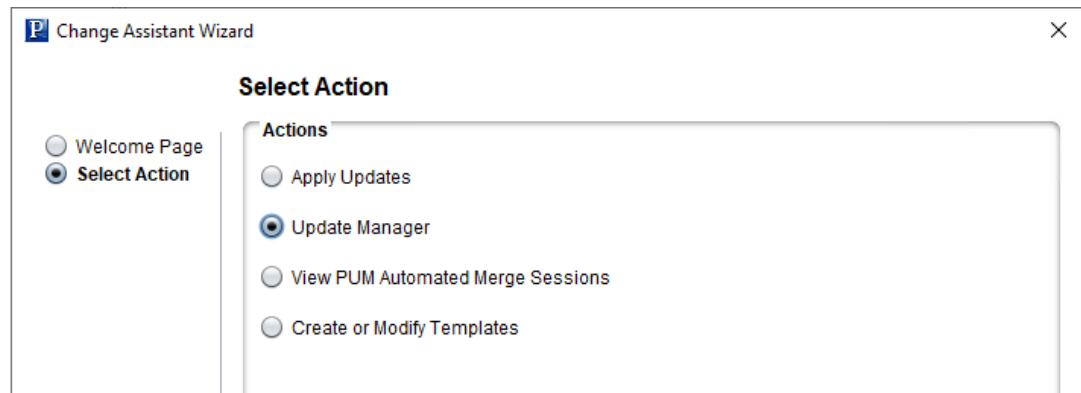
## Starting Change Assistant

To start Change Assistant:

1. Select Start, Programs, PeopleSoft Change Assistant 8.6x.xx, where x.xx refers to the release/patch number or use the Shortcut on the desktop.
2. Depending on your preferences, you may or may not see a Welcome dialog box. If the Welcome dialog box is displayed, click Next.

The Select Action page is displayed.

This example illustrates the fields and controls on the Change Assistant Wizard - Select Action page.



3. Select Update Manager and click Next.

### Note

You must select Update Manager for PUM-enabled maintenance.

## Configuring Change Assistant for Update Manager

If this is the first time you are selecting Update Manager, the Wizard will guide you through the environment setup. As you click Next you will complete the following pages:

### Note

The Change Assistant instance installed from the PUM DPK will already be configured. See [Installing Change Assistant from PeopleSoft Update Image DPK](#)

1. General Options
2. PUM Source Options
3. EM Hub Options
4. Additional Options
5. Select Task

**Note**

After the environment has been configured, you can use **Tools**, and then **Options** to make any changes to the environment options.

Change Assistant settings can be exported and imported, therefore the options only need to be set once. See [Exporting and Importing Change Assistant Settings](#).

## Setting General Options

If Change Assistant was installed from the PeopleSoft Update Image DPK, this page will be populated with the folders created as part of the install.

See [Creating and Applying Change Packages](#)

This example illustrates the fields and controls on the General Options page. You can find definitions for the fields and controls later on this page.

Change Assistant Wizard

Welcome Page

Select Action

Options

General

General Options

Settings

☒ Show Welcome Page

Maximum Concurrent Processes:

1

PS Home Server TCP Port Range:

6151

-

6320

PS Home Server Maximum Instances:

5

Time Out for Locking(Seconds,Max=99999):

300

Data Mover Consolidation Maximum Script Limit:

1000

Default Path Information for Change Assistant

\*PS Home:

C:\psft\pt\ps\_home8.59.02

...

\*Staging Directory:

C:\PUM\Staging\

...

\*Output Directory:

C:\PUM\Output\

...

\*Download Directory:

C:\PUM\Downloads

...

\*SQL Query Tool:

C:\psft\tdb\oracle-server\19.3.0.0\bin\sqlplus.exe

...

Back

Next

Finish

Cancel

| Field or Control              | Description                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maximum Concurrent Processes  | Specifies the maximum number of processes that can be executed concurrently on the local machine. The default is 1.                                                                                                                                                                                                                                                                     |
| PS Home Server TCP Port Range | Specify the port range for PS Home server.<br>Change Assistant uses this port number to communicate with Change Assistant PS Home servers. The default starting port number is 6151. If you enter a port number that is already in use, you see an error message. You must change to a port number that is not in use, and then restart Change Assistant for the change to take effect. |

Change Assistant and Update Manager  
G47469-01  
Copyright © 1988, 2026, Oracle and/or its affiliates.

July 20, 2026  
Page 4 of 23

| Field or Control                                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PS Home Server Maximum Instances</b>              | <p>Enter a number between 1 and 10 for the maximum number of PS Home servers.</p> <p>Use this value for environments with more than one PS_HOME. For each server instance, Change Assistant increments the PS Home Server Starting Port number by 1 up to the maximum number of instances. For example, with a PS Home Server Starting Port value of 6151 and a PS Home Server Maximum Instances value of five, the port numbers would be 6151, 6152, 6153, 6154, and 6155. The default is 5.</p> <p>If you change this value, you must restart Change Assistant for the change to take effect.</p> |
| <b>Time Out for Locking(Seconds,Max=99999)</b>       | <p>Specify the time out for locking.</p> <ul style="list-style-type: none"> <li>• Max value is 99999 = 27.8 hours</li> <li>• Default value is 300 = 5 minutes</li> </ul> <p>See <a href="#">Running Multiple Instances of Change Assistant</a></p>                                                                                                                                                                                                                                                                                                                                                  |
| <b>Data Mover Consolidation Maximum Script Limit</b> | <p>The valid Limit range is [0, 15000].</p> <p>0 and 1 mean there is no consolidation for data mover steps.</p> <p>The default is 1000.</p> <p>See <a href="#">Consolidating Data Mover Scripts</a></p>                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>PS Home</b>                                       | <p>Enter the full path in which you installed PeopleTools client on the Windows Client machine.</p> <p><b>Note:</b> Specify the PS_HOME location you used to install Change Assistant.</p>                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Staging Directory</b>                             | <p>Enter the directory in which you would like to stage all the Change Assistant update files. This is the location that Change Assistant will store files to be used during the apply update process.</p>                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Output Directory</b>                              | <p>Enter the directory in which you want the log files generated by the update process to reside.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Download Directory</b>                            | <p>Enter the full path of the location to which you want to download your change packages.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SQL Query Tool   | <p>Select the correct executable for the database platform that matches the PS_HOME defined for CA.</p> <p><b>Note:</b> The SQL Query tool must align with the installed Change Assistant version.</p> <p>This value is used as the default when creating databases. Each database contains separate settings and therefore, you can change this executable for a specific database.</p> <p>Valid SQL query executables for each platform are:</p> <ul style="list-style-type: none"> <li>• DB2: db2cmd.exe</li> <li>• Microsoft SQL Server: sqlcmd.exe</li> <li>• Oracle: sqlplus.exe</li> </ul> <p><b>Note:</b> Change Assistant uses the command line version of the .exe, not the GUI version. For example, sqlplus.exe is used for an Oracle database, rather than sqlplussw.exe.</p> <p><b>Important:</b> <i>Oracle Database Customers:</i> For systems running on the Oracle database, by default, Change Assistant copies the generated SQL script files to the location specified as the TEMP User variable on the Environment Variables dialog box. So, on Oracle, the generated SQL script files will actually exist in two locations: the specified Change Assistant output directory, and the TEMP directory. This behavior is in place because some versions of Oracle SQL Plus do not support pathnames longer than 79 characters. It is recommended that you ensure that the value specified for the TEMP User variable is set to a path short enough so that the string comprising the path and generated SQL file will not exceed 79 characters.</p> |

## Setting PUM Source Options

The PUM Source Options page is used to define the PUM source as well as managing the Customization Repository, Test Repository and Migrating Customer Data.

### Note

When Change Assistant is installed as a part of the PeopleSoft Update Image DPK, the PUM Source database is defined in Change Assistant.

This example illustrates the fields and controls on the PUM Source Options page. You can find definitions for the fields and controls later on this page.

| Field or Control              | Description                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Define PUM Source</b>      | Select this checkbox to define the PUM Source.<br><b>Note:</b> Not all Change Assistant actions require a PUM Source.                                                                                                                                                                                                                                                                    |
| <b>PUM Source Database</b>    | If the database has already been defined, it will be available from the drop-down list. After you select a database that has already been configured, the database information on the remainder of the page will be displayed in read-only mode.<br>If the database has not been defined yet, click Create which will launch the Database Wizard. See <a href="#">Defining Databases</a> |
| <b>PUM(PI_HOME) Directory</b> | Enter the path to the pi_home share on the PI. The pi_home share contains all files needed for patching.<br><b>Note:</b> The drive is a path mapped to the pi_home share folder.                                                                                                                                                                                                         |
| <b>PUM Source PIA URL</b>     | Enter the URL to sign on to the PUM Source.                                                                                                                                                                                                                                                                                                                                              |

| Field or Control                      | Description                                                                                                                       |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>PUM Source Additional Settings</b> | Select Install to install additional languages on the PUM Source.<br>See <a href="#">Installing Additional Languages</a>          |
| <b>Customization Repository</b>       | This section is used to manage the Customization Repository.<br>See <a href="#">Creating Customization Repository</a> .           |
| <b>Test Repository</b>                | Select Manage to enable the Test Repository and upload tests to the PUM source.<br>See <a href="#">Creating Test Repository</a> . |
| <b>Metadata Management</b>            | Select Manage to migrate metadata from a previous PUM Source.<br>See <a href="#">Migrating PUM Data</a> .                         |

When you click OK, Change Assistant will validate the connection to the PUM Source database.

## Installing Additional Languages

To install additional languages on the PUM source, select the Install button.

This example illustrates the fields and controls on the PUM Source Language Installation page. You can find definitions for the fields and controls later on this page.

**PUM Source Language Installation**

**PUM Source language install**

Source Database: H92NEWCD

Installed languages: ENG

☒ Select languages to install based on existing database definition

Target Environment(s): H92MLTGT

Installed Languages: ENG,ESP,FRA

☐ Select languages manually

|                                          |                                   |                                     |
|------------------------------------------|-----------------------------------|-------------------------------------|
| <input type="checkbox"/> Canadian French | <input type="checkbox"/> Danish   | <input type="checkbox"/> Dutch      |
| <input type="checkbox"/> Spanish         | <input type="checkbox"/> Finnish  | <input type="checkbox"/> French     |
| <input type="checkbox"/> German          | <input type="checkbox"/> Italian  | <input type="checkbox"/> Japanese   |
| <input type="checkbox"/> Korean          | <input type="checkbox"/> Polish   | <input type="checkbox"/> Portuguese |
| <input type="checkbox"/> Russian         | <input type="checkbox"/> Swedish  | <input type="checkbox"/> Thai       |
| <input type="checkbox"/> SCHinese        | <input type="checkbox"/> TChinese |                                     |

Install Close

| Field or Control                                                 | Description                                                                                                                                                                                  |
|------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select language to install based on existing database definition | Select this radio button if you have defined a target database that includes additional languages.<br><br>When you select the target environment, the installed languages will be displayed. |
| Select languages manually                                        | Select this radio button to manually select the languages to install.                                                                                                                        |

## Setting EM Hub Options

## EM Hub Options

Use this page to configure the EM Hub options for the target database.

This example illustrates the fields and controls on the Change Assistant - EM Hub Options page. You can find definitions for the fields and controls later on this page.

**Update Manager Options**

General PUM Source **EM Hub** Additional

**Environment Manager**

☒ Configure EMHub For Deploy File

\*Server Host Name: localhost

\*Server Host Port: 8443

\*Chunk Size: 2048

\*Ping Interval: 60000

**Security Management**

\*SSL: Client and Server Certificate

\*Truststore: C:/Users/GEORGE Documents/client-keystore.jks.txt

\*Truststore Password: \*\*\*\*\*

\*Keystore: C:/Users/GEORGE Documents/client-truststore.jks.txt

\*Keystore Password: \*\*\*\*\*

**Test**

Ping View

OK Cancel

| Field or Control                       | Description                                                                                                                                     |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Configure EMHub For Deploy File</b> | Select this check box if you want to use EMHub for file deploy.<br><b>Note:</b> In order to use this option EMF must be configured and running. |
| <b>Server Host Name</b>                | The hostname of the server in which the Environment Management HUB resides.                                                                     |
| <b>Server Host Port</b>                | Indicates the port in which to connect to the Environment Management hub.                                                                       |

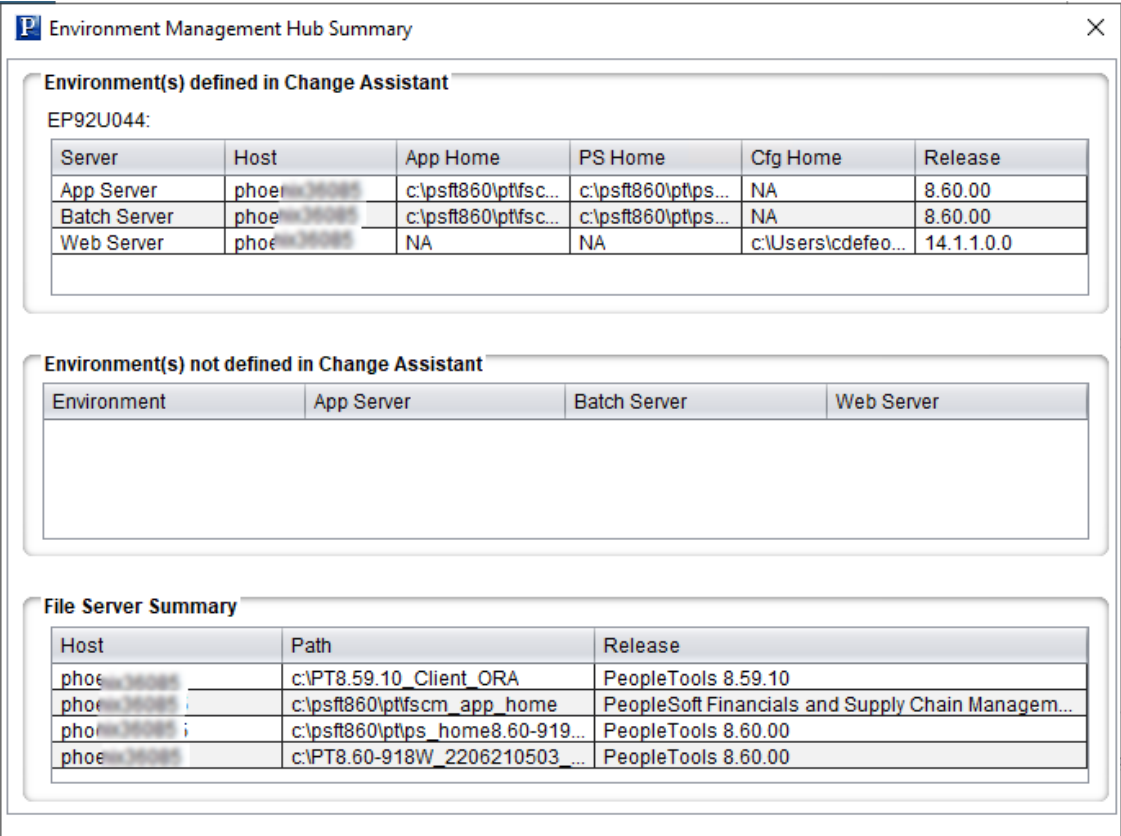
| Field or Control    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chunk Size          | Used for deploying files during a software update. Default is 1024 * 1024 bytes. Typically this does not need to be changed unless there are a significant number of files greater than 1024KB in a software update.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Ping Interval       | Ping interval is in milliseconds for Change Assistant to contact the hub for new messages.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| SSL                 | <p>You can choose to allow connections from clients who are part of the allowlist or use two-way SSL. The different connections are:</p> <ul style="list-style-type: none"> <li>• None (Allowed List)- Connects with EM Hub using HTTP connection. When this option is selected, keystore and truststore related fields are disabled.</li> <li>• Server Certificates Only (Allowed List)- Lets to connect with one-way SSL. When this option is selected, keystore and keystore password fields are disabled. However, truststore related fields are enabled</li> <li>• Client and Server Certificate- Lets to connect with EM Hub using two-way SSL. When this option is selected, keystore and truststore related fields are enabled.</li> </ul> <p>If the EM Hub server uses the connection type HTTP or one-way SSL, then the client hostname or IP address need to be added to the <code>allowedhost.properties</code> file so that the client host is allowed to make a connection request. The <code>allowedhost.properties</code> file is available in <code>/webserve/peoplesoft/applications/peoplesoft/PSEMHUB.war/envmetadata/config/</code>.</p> <p>For details, refer <a href="#">Configuring the Environment Management Hub</a>.</p> |
| Truststore          | Select the truststore file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Truststore Password | Enter the truststore password which is encrypted and then stored in <code>psvault</code> file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Keystore            | <p>Select the keystore file.</p> <p>For details on configuring keystore and truststore, refer <i>System and Server Administration: Implementing WebLogic SSL Keys and Certificates</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Keystore Password   | <p>Enter the keystore password which is encrypted and then stored in <code>psvault</code> file.</p> <p>For details on generating encrypted passwords, refer <i>Security Administration: Generating a Unique Encryption Key</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Ping                | Click to verify a valid server URL. If you see <i>Service is off</i> to the right of this button, then you must correct the server URL and ping again until you see <i>Service is on</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

| Field or Control | Description                                                                                                         |
|------------------|---------------------------------------------------------------------------------------------------------------------|
| View             | Click to display the list of all PeopleSoft components discovered and registered in the Environment Management Hub. |

Environment Management Hub Summary

When you click the View button, the Environment Manager Hub Summary page is displayed.

This example illustrates the fields and controls on the Environment Management Hub Summary page. You can find definitions for the fields and controls later on this page.



| Field or Control                               | Description                                                                                                                                                                                                        |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Environment(s) defined in Change Assistant     | If the database has been defined in Change Assistant, the grid will display the Server, Host, App Home, PS Home, Cfg Home and Release for each database that is discovered by EMF and defined in Change Assistant. |
| Environment(s) not defined in Change Assistant | If EM Hub is running and it discovers databases , that have not yet been defined in Change Assistant, they will be listed.                                                                                         |
| File Server Summary                            | Lists the file servers discovered by EM Hub.                                                                                                                                                                       |

# Setting Additional Options

This example illustrates the fields and controls on the Change Assistant - Additional Options page. You can find definitions for the fields and controls later on this page.

Change Assistant Wizard

Additional Options

Welcome Page

Select Action

Options

General

PUM Source

EM Hub

Additional

Notification Settings

Send Email Notifications

SMTP Server:

Port:

Send To:

Return Address:

Test

Proxy

Host:

Port:

Anonymous Proxy

Microsoft Proxy Server

Windows Domain:

Other Proxy Servers

Back

Next

Finish

Cancel

## Notification Settings Section

| Field or Control         | Description                                                                                                                                                                                           |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Send Email Notifications | Select this check box to receive email notifications if there are errors in the update process. Change Assistant also sends you a completion message when it encounters a Stop in the update process. |
| SMTP Server              | Enter the SMTP mail server from which you receive the error or completion messages.                                                                                                                   |
| Port                     | Enter the port from which you want to access the email.                                                                                                                                               |
| Send To                  | Enter the address to which you want the email sent.                                                                                                                                                   |

Change Assistant and Update Manager  
G47469-01  
Copyright © 1988, 2026, Oracle and/or its affiliates.

July 20, 2026  
Page 13 of 23

| Field or Control              | Description                                                                                                                                                             |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Return Address</b>         | Enter the email address of the sender. Use this to identify who sent the notification.                                                                                  |
| <b>Test</b>                   | Validates that email is sent to the designated recipients and is working correctly.<br><b>Note:</b> Ensure that your SMTP server is installed and configured correctly. |
| Proxy Section                 |                                                                                                                                                                         |
| Field or Control              | Description                                                                                                                                                             |
| <b>Host</b>                   | (Optional) Enter the name of the proxy server if you want to run Change Assistant behind the firewall using a proxy server.                                             |
| <b>Port</b>                   | (Optional) Enter the port number for the proxy server.                                                                                                                  |
| <b>Anonymous Proxy</b>        | Indicates that you are using a proxy server that does not require authenticated connections.                                                                            |
| <b>Microsoft Proxy Server</b> | Indicates that you are using a proxy server with Windows authentication.                                                                                                |
| <b>Windows Domain</b>         | The network domain in which the system runs.                                                                                                                            |
| <b>Other Proxy Servers</b>    | Indicates you are using non-Microsoft proxy servers.                                                                                                                    |

## Select Task

This example illustrates the fields and controls on the Change Assistant Wizard - Select Task page. You can find definitions for the fields and controls later on this page.

Depending on the options configured, some tasks may be not be enabled. For example if EM Hub is not defined, Validate Change Assistant EM Settings will be grayed out.

| Field or Control                                        | Description                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Validate Change Assistant EMF Settings</b>           | <p>Select to validate the settings. Change Assistant validates settings by:</p> <ul style="list-style-type: none"> <li>Locating valid SQL query tools required to run SQL scripts.</li> <li>Testing the Environment hub and ensuring Change Assistant can communicate with it.</li> </ul> <p>See <a href="#">Validating Change Assistant EMF Settings</a></p> |
| <b>Upload Target Database Information to PUM Source</b> | <p>Select to upload the target database information to the PUM source database. Once the database information is uploaded, the database will be available in PeopleSoft Update Manager as a target database.</p> <p>See <a href="#">Uploading Target Database Information</a></p>                                                                             |

| Field or Control                                                        | Description                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Define Change Package</b>                                            | Select to open the Wizard that will guide you through the process of defining a change package. Change packages can be defined using Update Manager Dashboard or Change Assistant.<br>See <a href="#">Defining Change Package</a> |
| <b>Create Change Package</b>                                            | Select to open the Wizard that will guide you through the process of creating a change package based on defined change package.<br>See <a href="#">Creating Change Package</a>                                                    |
| <b>Apply Change Package</b>                                             | Select after the custom change package has been created to apply the change package to your target database.<br>See <a href="#">Applying Change Package</a>                                                                       |
| <b>Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image</b> | Select to apply a PRP to the PeopleSoft Update Image.<br>See <a href="#">Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image</a>                                                                           |
| <b>Upgrade to New Application Release</b>                               | Select to upgrade your target database to a new application release.<br>See <a href="#">Upgrading Application</a>                                                                                                                 |
| <b>Apply a Patch to Your Current PeopleTools Release</b>                | Select to apply a PeopleTools patch change package.<br>See <a href="#">Using Change Assistant to Apply PeopleTools Patch</a>                                                                                                      |
| <b>Upgrade to a New Release of PeopleTools</b>                          | Select to apply a new release of PeopleTools change package.<br>See <a href="#">Using Change Assistant to Upgrade PeopleTools</a>                                                                                                 |
| <b>Export/Import Change Assistant Settings</b>                          | Select to export or import Change Assistant Settings.<br>See <a href="#">Exporting and Importing Change Assistant Settings</a>                                                                                                    |

From this page, you also have the ability to go directly to other pages by selecting the radio button on the left:

| Field or Control      | Description                                                                                                   |
|-----------------------|---------------------------------------------------------------------------------------------------------------|
| <b>Welcome Page</b>   | Select to go to the Welcome page.                                                                             |
| <b>Select Action</b>  | Select to go to the Select Actions page.                                                                      |
| <b>General</b>        | Select to go to the General Options page.                                                                     |
| <b>PUM Source</b>     | Select to go to the PUM Source Options page.                                                                  |
| <b>EM Hub Options</b> | Select to go to the EM Hub Options page.                                                                      |
| <b>Additional</b>     | Select to go to the Additional Options page.                                                                  |
| <b>Select Task</b>    | This radio button is selected by default to lead you through the wizard for the option selected on the right. |

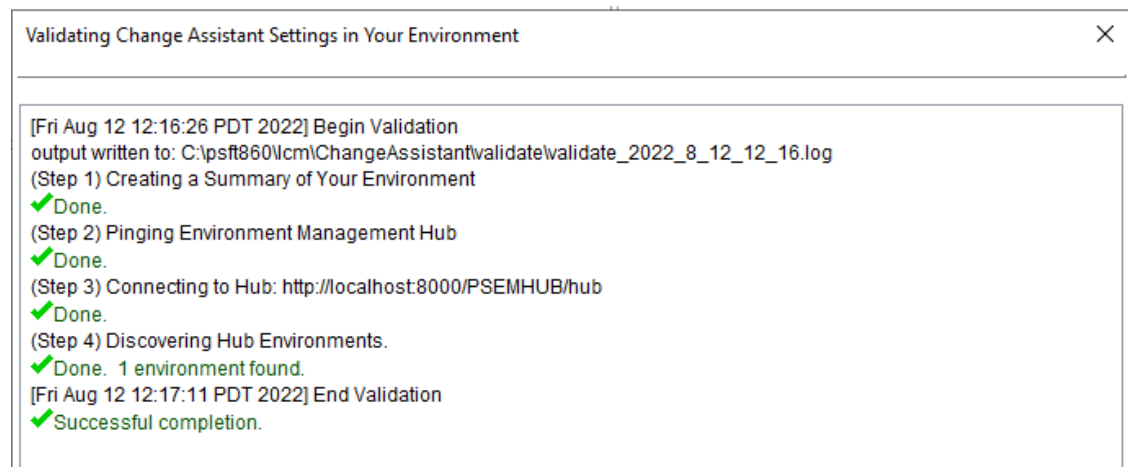
## Validating Change Assistant EMF Settings

After you have set up and configured Change Assistant and the Environment Management components, you should validate your Change Assistant and environment settings. To validate your environment:

1. Select the Validate Settings radio button.
2. Click Finish.
3. Click Start Validation.

When the validation is complete, a completion message appears. To view the log, click the View Log button. The log will contain information about any steps that were not successful.

This example illustrates the fields and controls on the Validating Change Assistant Settings in Your Environment dialog box



## Defining Target Database

The Define Database page is used to define all databases. See [Defining Databases](#).

When defining the target database to use with PUM, make sure that the various PS homes are properly configured based on your database platform and release.

### ! Important

You only need to define the database once. When you install a new instance of Change Assistant the existing settings can be maintained. See [Exporting and Importing Change Assistant Settings](#).

## PS Home

PS Home needs to be set to the PeopleTools release/patch for your target database.

When you set up your windows environment, you may have installed 2 PS Homes. One for Oracle on the PUM image release/patch, which is used for the PUM Source PS Home and one

for your target database platform at the supported release/patch level for your target environment. Make sure you select the PS Home for your target environment.

## PS App Home

PS App Home is the location where you installed your PeopleSoft application files for your target environment. If you needed to install a new PS Home to use with the PUM image, it will not contain your application files. Make sure you select the path where your application files reside.

## PS Cust Home

If you are using PS\_CUST\_HOME (PeopleSoft Customization Home) to identify and store your site's customized files, you need to specify the path PS Cust Home.

# Uploading Target Database Information

In order to use the Update Manager actions, the PUM Source must contain all of the information about your target database. The upload may take several minutes. This information includes:

- Database name
- Database user defined in Change Assistant for this database.

### Note

Change Packages are associated with both database and user ID. The user ID on the target database must match the user ID used to signon to the PUM source in PIA when you create a define a change package.

- Products
- Languages

### Note

If you have multiple target databases with different languages, you will need to install separate PeopleSoft Update Images for each language combination.

To upload the target database information:

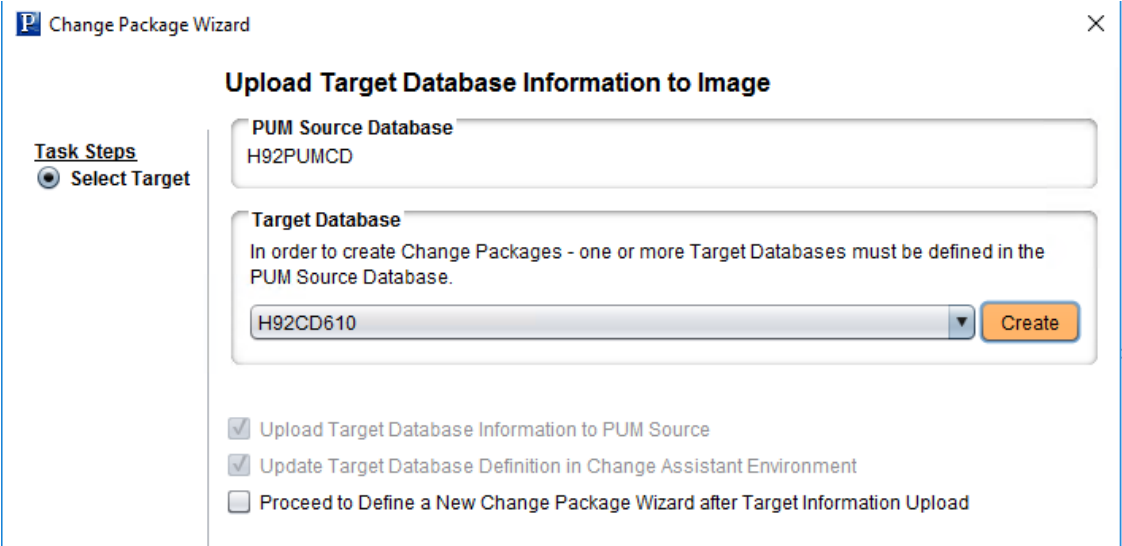
1. In Change Assistant, select Tools, Change Actions.
2. Select Update Manager and click Next.
3. Select Upload Target Database Information to PUM Source and click Finish.

### Note

The PUM Source must be defined before this option is available to select.

4. Select or Create the target database to upload.

This example illustrates the fields and controls on the Upload Target Database Information to PUM Source page. You can find definitions for the fields and controls later on this page.



| Field or Control                                                                   | Description                                                                                                                        |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>Target Database</b>                                                             | Select an existing target database or create a new target database using the Create button. See <a href="#">Defining Databases</a> |
| <b>Upload Target Database Information to PUM source</b>                            | This check box is always selected and read only. This option upload the target database information to the PUM Source.             |
| <b>Update Target Database Information in Change Assistant Environment</b>          | This check box is always selected and read only. This option updates Change Assistant with the target database information.        |
| <b>Proceed to Define New Change Package Wizard after Target Information Upload</b> | Select this check box to open the Define a New Change Package Wizard after target information is uploaded.                         |

**Note**

After upgrading the target database tools release, it is necessary to update the target database in Change Assistant and upload the upgraded target database information to the PeopleSoft Update Image database. In Change Assistant, select File, Open Database and update the target database. After updating the target database, select Tools, Upload Target Database Information to PUM Source.

# Defining Change Package

In order to define a new change package, the following steps must be completed:

- PUM Source Database defined.
- Target Database defined.
- Target Database uploaded to the PUM Source.

See [Selecting Update Manager Action](#)

Use the Define Change Package action to create the change package definition. Change packages can be created using Update Manager Dashboard or Change Assistant.

To define a new change package:

1. In Change Assistant, select the Update Manager action.

The Update Manager action is available from:

- The menu by selecting Tools, Change Actions.
- Clicking Next on the Welcome page.

2. Select Define Change Package and click Finish.

This example illustrates the fields and controls on the Define Change Package. You can find definitions for the fields and controls later on this page.

**Change Package Wizard**

**Define Change Package**

**Define CP**  
☒ Select

**PUM Source Database**  
H92PUMCD

☒ Define a New Change Package in Update Manager Dashboard

Click Here to Open Browser and Connect to the PUM Source Database

☐ Define a New Change Package in Change Assistant

**Package Definition**

Target Database: H92CD610

Package Name:

Package Description:

**Search Definition Option**

☒ Standard System Search Criteria ☐ Previously Defined Search Criteria

Select the method to use for creating the Change package.

## Defining a New Change Package in Update Manager Dashboard

Select the *Click Here to Open Browser and Connect to PUM Source Database* button to define the change package in PIA.

Use the PeopleSoft PIA application to create the change package definition. See [Defining Update Change Packages](#)

## Defining a New Change Package in Change Assistant

Standard search options are available for common use cases. Customers also have the option to create their own commonly used search criteria.

This example illustrates the fields and controls on the Define a New Change Package in Change Assistant page. You can find definitions for the fields and controls later on this page.

**Change Package Wizard**

**Define Change Package**

**Define CP**  
☒ Select

PUM Source Database  
H92PUMCD

☐ Define a New Change Package in Update Manager Dashboard

Click Here to Open Browser and Connect to the PUM Source Database

☒ Define a New Change Package in Change Assistant

**Package Definition**

Target Database: H92CD610

Package Name: CRITICAL

Package Description: Critical updates for my installed products

**Search Definition Option**

☒ Standard System Search Criteria ☐ Previously Defined Search Criteria

| Field or Control                | Description                                                                                                                                                                                                                                                                                                               |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Target Database</b>          | Select the target database.                                                                                                                                                                                                                                                                                               |
| <b>Package Name</b>             | Enter a package name.                                                                                                                                                                                                                                                                                                     |
| <b>Package Description</b>      | Enter a package description. (Optional)                                                                                                                                                                                                                                                                                   |
| <b>Search Definition Option</b> | Select the type of search definition. <ul style="list-style-type: none"> <li>Standard System Search Criteria<br/>When you click Next, the standard system searches will be displayed.</li> <li>Previously Defined Search Criteria<br/>When you click Next, your previously defined searches will be displayed.</li> </ul> |

### Standard Search Options

The same standard system search options available from the Update Manager Dashboard are available in Change Assistant. These include:

- All Unapplied Updates for Installed Products
- All Critical Unapplied Updates for Installed Products
- All Critical Updates Not Applied
- All Tax Updates Not Applied
- All True Requisites Not Applied
- All Updates Not Applied

## Previously Defined Search Criteria

If you select Previously Defined Search Criteria and click Next, the list will include all Change Package definitions with a status of Complete in the PUM source database.

This example illustrates the fields and controls on the Previously Defined Search Criteria page.

**Define Change Package**

**Define CP**

☐ Select

☒ Search

**PUM Source Database**

H92PUMCD

**Package**

Target Database: H92CD610

Package Name: EXAMPLE2

Tools Release: 8.57.07

| Select                           | Search  | Description |
|----------------------------------|---------|-------------|
| <input checked="" type="radio"/> | DEMO    | DEMO        |
| <input type="radio"/>            | EXAMPLE | EXAMPLE     |
| <input type="radio"/>            | TL_ENH  | TL_ENH      |

☐ Proceed to Create Change Package Wizard after Package Definition

Select the checkbox if you want to proceed to create the change package when the package is defined. Click either Finish or Next (if you selected to proceed to create change package) to define the change package.

## Creating Change Package

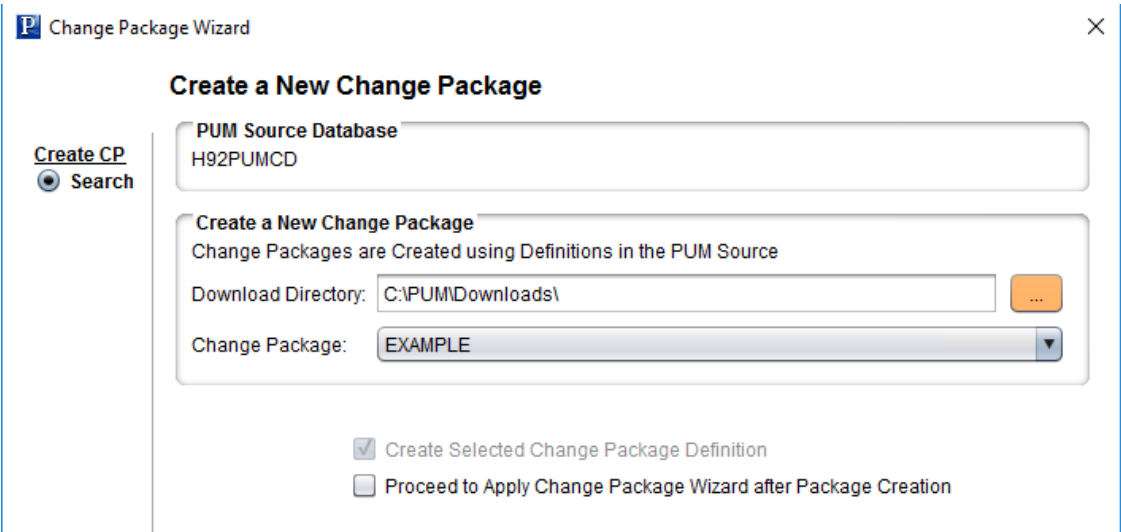
Use the Create Change Package action to create the change package in Change Assistant. The Change Package definition must have a status of complete in order for it to be available in Change Assistant.

To create a change package:

1. In Change Assistant, select the Update Manager action.  
The Update Manager action is available from:
  - The menu by selecting Tools, Change Actions.
  - Clicking Next on the Welcome page.
2. Select Create Change Package and click Finish.
3. Select the change package to create and click Finish.

The Change Package Wizard will generate the change package. When the package is created you will receive a message indicating the change package was successfully created.

This example illustrates the fields and controls on the Create a New Change Package page. You can find definitions for the fields and controls later on this page.



| Field or Control                                                     | Description                                                                                                                      |
|----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>Download Directory</b>                                            | Select the download directory to use for this change package. The default is the download directory defined on the Options page. |
| <b>Change Package</b>                                                | Select the change package from the drop down of available change package definitions.                                            |
| <b>Proceed to Apply Change Package Wizard after Package Creation</b> | Select this check box to proceed to the Apply Change Package Wizard when the package is created.                                 |

From PeopleTools 8.60, Change Assistant exports minimal Managed Object (MO) project that is sufficient for the change package create process. The entire MO project is exported during the change package apply process as the source apply step. This is applicable to the package types RFU, PUM, DLT, TDP, and UPG available in the Update Manager mode.

**Note**

This minimal MO project should not be used to run any compares with the Target database since it is a minimal package.

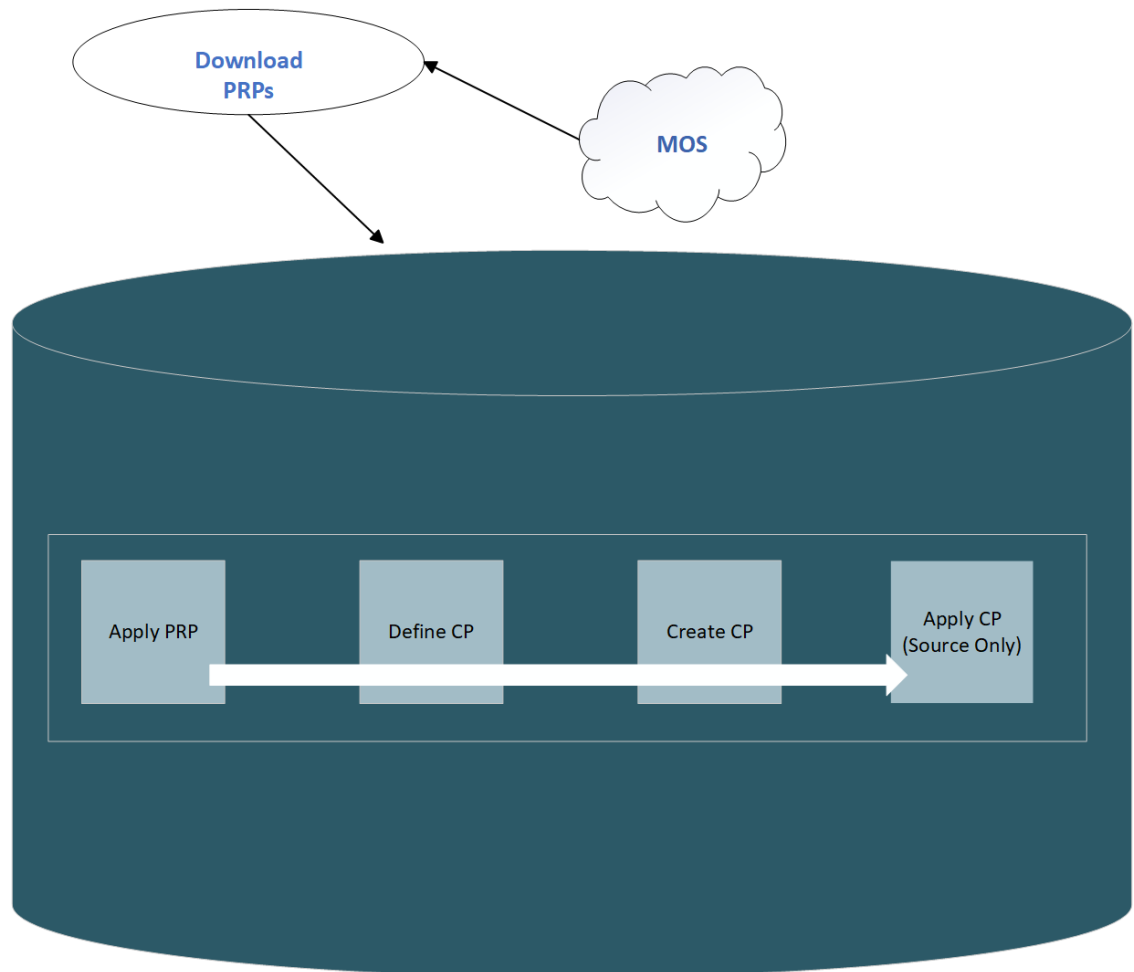
# 10

## Using PUM Automated Updates

### Understanding PUM Automated Updates

Customers can configure Update Manager to automatically download Application Update Image DPKs, PRPs, apply the PRPs, define and create change packages, as well as apply the source only steps.

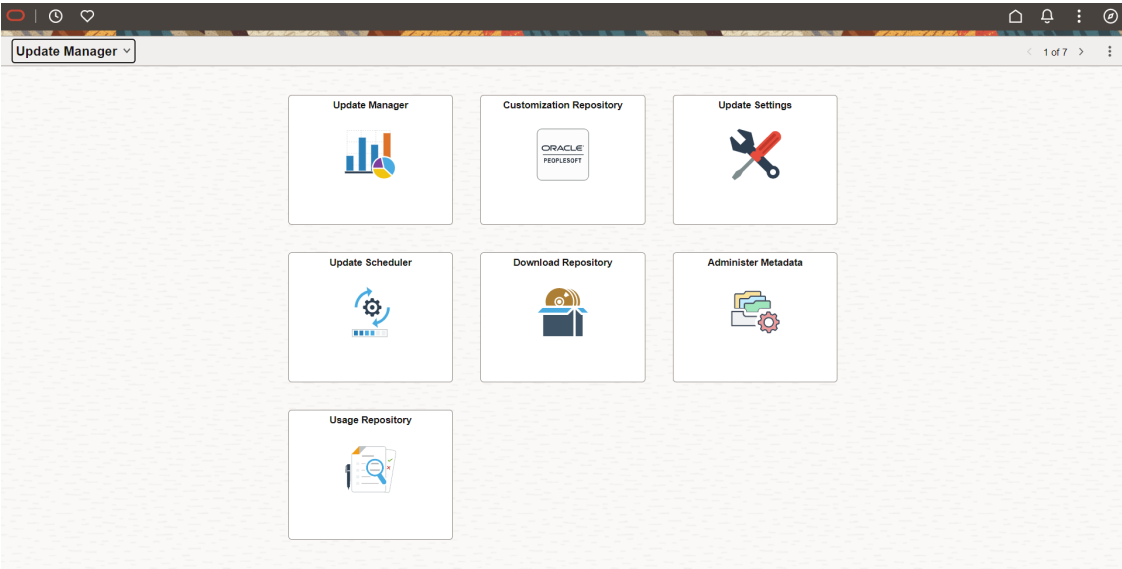
This gives an overview:



See [Installing Change Assistant from PeopleSoft Update Image DPK](#) and *PeopleSoft Deployment Packages for Update Images Installation (PeopleSoft PeopleTools)*.

The Update Manager Homepage provides the tiles to set up automations and schedule updates.

This example illustrates the fields and controls on the Update Manager Homepage. You can find definitions for the fields and controls later on this page.



| Term                            | Definition                                                                                                                                  |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Update Settings</b>          | Select this tile to view or modify MOS credentials, notifications and settings.<br>See <a href="#">Setting Credentials for Automation</a> . |
| <b>Update Scheduler</b>         | Select this tile to define and schedule jobs.<br>See <a href="#">Scheduling Update Jobs</a> .                                               |
| <b>Download Repository</b>      | Select this to view downloads.<br>See <a href="#">Viewing Download Repository</a>                                                           |
| <b>Customization Repository</b> | Select this tile to manage customizations when selecting updates in the PUM Search.                                                         |
| <b>Administer Metadata</b>      | Select this tile to define and manage databases using Update Manager.                                                                       |
| <b>Usage Repository</b>         | Select this tile to fetch usage monitor data from different databases.                                                                      |

**Note**

PUM Automated Updates requires a full-tier installation; that is, all components must reside on the same server.

## Setting Credentials for Automation

The Update Settings component contains three pages:

- Settings
- Notifications
- Subscription

## Setting Credentials

Automation requires the proper credentials. MOS credentials are necessary to download the PRPs from My Oracle Support (MOS) and must be entered by the customer. The Image and REST services credentials are auto-updated during DPK installation, these credentials can be added or modified as necessary. The REST credentials will be used by the Download Manager to communicate the status of PRPs downloads.

Note that PAU uses OAuth 2.0 for authentication.

### Note

PAU needs access to <https://updates.oracle.com> to download DPKs and PRPs.

### Note

When using VirtualBox to install a PUM environment, a proxy configuration is required for the downloads depending on the customer network settings and the VirtualBox network configuration.

Use the Settings page to review and enter credentials.

This example illustrates the fields and controls on the Settings page for MOS Credentials. You can find definitions for the fields and controls later on this page.

The screenshot shows a web interface with a sidebar on the left containing 'Settings', 'Notifications', and 'Subscriptions'. The main content area is titled 'Settings' and has a 'Save' button in the top right. Under the 'Settings' heading, there are four expandable sections: 'MOS Credentials' (expanded), 'Image Credentials', 'REST Service Credentials', and 'PUM Source Settings'. The 'MOS Credentials' section contains two input fields: 'User ID' and 'Password'. The 'User ID' field has a placeholder text 'Enter your user ID' and the 'Password' field has a placeholder text 'Enter your password'.

These MOS credentials are used to connect to MOS, while downloading PRPs from MOS. When the page is saved, the system will validate connectivity to MOS using the credentials, encrypt the credentials and save to the database.

| Field or Control | Description                                            |
|------------------|--------------------------------------------------------|
| <b>User ID</b>   | Enter the user ID for your My Oracle Support account.  |
| <b>Password</b>  | Enter the password for your My Oracle Support account. |

This example illustrates the fields and controls on the Image Credentials section. You can find definitions for the fields and controls later on this page.

Settings

Settings

Notifications

Subscriptions

MOS Credentials

Image Credentials

DB User ID

PS

Connect ID

people

Access ID

emdbo

DB Admin ID

emdbo

DB Password

.....

Connect Password

.....

Access Password

.....

DB Admin Password

.....

REST Service Credentials

PUM Source Settings

Initially these credentials are provided from the DPK when the PUM environment is deployed, then through the Automated Configuration Manager (ACM).

These credentials need to be updated if they are changed in the PUM source. All credentials are encrypted before storing in the database.

| Field or Control  | Description                         |
|-------------------|-------------------------------------|
| DB User ID        | Database User ID.                   |
| DB Password       | Database password.                  |
| Connect ID        | Connect Id for the database.        |
| Connect Password  | Connect ID password.                |
| Access ID         | Access Id for the database.         |
| Access Password   | Access ID password                  |
| DB Admin ID       | Database Administrator ID.          |
| DB Admin Password | Database Administrator ID password. |

This example illustrates the fields and controls on the REST Service Credentials. You can find definitions for the fields and controls later on this page.

Settings

Settings

Notifications

Subscriptions

Settings

Save

MOS Credentials

Image Credentials

REST Service Credentials

User ID

PS

Password

.....

PUM Source Settings

Initially these credentials are provided from the DPK when the PUM environment is deployed, then through the Automated Configuration Manager (ACM).

These credentials need to be updated if the REST Service credentials are changed in the PUM source.

REST Services are used by the Download Manager that downloads PRPs to communicate status of downloads. The user ID must have permission list PTPT4300.

This example illustrates the fields and controls on the PUM Source Settings. You can find definitions for the fields and controls later on this page.

Settings

Settings

Notifications

Subscriptions

Settings

MOS Credentials

Image Credentials

REST Service Credentials

PUM Source Settings

Enable Customization

Enable Merge

Enable test

Mergeable Objects

Use the PUM Source Settings to enable the upload of customization projects and enable object merge.

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable Customization | Enables the upload of customizations to the PUM Source.<br>Note that you can set up customization repository from Change Assistant as well.<br>See <a href="#">Understanding Customization Repository</a>                                                                                                                                                                                                                                                                                                               |
| Enable Merge         | Enables object merge for PeopleCode, SQL and XSLT objects in your Customization Repository.<br>When object merge is enabled in the PUM source, the upload Customization fetches the object merge data in the Customization project (Peoplecode, SQL and XSLT) and schedules version update Application Engine to set the appropriate object version to the mergeable objects uploaded.<br>Note that you can enable object merge from Change Assistant as well.<br>See <a href="#">Understanding PUM Automated Merge</a> |
| Enable test          | Enables the upload to test repository.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Mergeable Objects    | Shows a list of mergeable objects.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Viewing Notifications

Use the Notifications page to set up preferences for notifications.

This example illustrates the fields and controls on the Navigations page. You can find definitions for the fields and controls later on this page.

| Field or Control            | Description                                                                                               |
|-----------------------------|-----------------------------------------------------------------------------------------------------------|
| <b>Distribution ID Type</b> | Select User or Role.                                                                                      |
| <b>Distribution ID</b>      | Enter the User ID or role name.                                                                           |
| <b>On Initiation</b>        | Select Yes to be notified when an automated update job is initiated.                                      |
| <b>On Success</b>           | Select Yes to be notified when an automated update job runs to success.                                   |
| <b>On Failure</b>           | Select Yes to be notified when an automated update job fails.                                             |
| <b>Email Notification</b>   | Select to send email notifications.<br><b>Note:</b> For details, see Email Details later in this section. |

If Email Notification is selected, enter the SMTP details:

This example illustrates the fields and controls on the Email details section. You can find definitions for the fields and controls later on this page.

| Field or Control           | Description                                                                         |
|----------------------------|-------------------------------------------------------------------------------------|
| <b>Server Name</b>         | Enter the SMTP mail server from which you receive the error or completion messages. |
| <b>Port Number</b>         | Enter the port from which you want to access the email.                             |
| <b>Connection Security</b> | Select the connection security.<br>SSL/TLS type connection                          |

| Field or Control     | Description                                                               |
|----------------------|---------------------------------------------------------------------------|
| <b>User Name</b>     | Enter the user name to log in to the SMTP server.                         |
| <b>Password</b>      | Enter password for SMTP user name.                                        |
| <b>Email To</b>      | Enter the email address.                                                  |
| <b>Email CC</b>      | Enter the email address.                                                  |
| <b>On Initiation</b> | Select Yes to send an email when an automated update job is initiated.    |
| <b>On Success</b>    | Select Yes to send an email when an automated update job runs to success. |
| <b>ON Failure</b>    | Select Yes to send an email when an automated update job fails.           |

### Email Details

The email notification for tasks, such as, Download PRPs from MOS or Apply PRPs to PUM Source, contains all relevant details.

| Task                                              | Details                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Download PRPs from MOS or Apply PRP to PUM Source | <p>Displays the:</p> <ul style="list-style-type: none"> <li>• PRP name, description and download time.</li> <li>• Link to the Job Monitor page.</li> <li>• Link to the PRP Details page that has details of all PRPs downloaded or applied.</li> </ul> <p>When user runs Download and Apply PRP in one PAU job, it sends two emails with list of PRPs downloaded and PRPs applied.</p> |
| Define Change Package/ Create Package             | <p>Displays the:</p> <ul style="list-style-type: none"> <li>• Change Package name, database name, search scope, and search name.</li> <li>• Link to the Job Monitor page.</li> </ul>                                                                                                                                                                                                   |
| Apply Change Package                              | Displays the success or failure status and link to the Job Monitor page.                                                                                                                                                                                                                                                                                                               |

This example illustrates the fields and controls on the PRP Details page.

**PRP Details**

Job Name: DEMO\_TESTPRPAPPLY  
Task Name: Apply PRP  
Task State: COMPLETED

Below are the PRPs processed

| PRP Name <sup>1</sup> | Artifact Name <sup>1</sup>                                       | Apply Date Time <sup>1</sup> | Status <sup>1</sup> |
|-----------------------|------------------------------------------------------------------|------------------------------|---------------------|
| updPRJ33454386        | GPUK: NI INCORRECT FOR RETRO FOR A NEW HIRED EMPLOYEE            | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33556293        | GPUK 9.2 GPUK START OF YEAR (SOY) 2022 - 23                      | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33905487        | GPMX_2022 LEGAL CHANGES UPDATE CFDI VERSION 4.0 2022             | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33617006_141    | CAN: CREATE 2021 T4A PDF TEMPLATE FOR BI PUBLISHER PROCESSING    | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33626686        | UNABLE TO SEND W-2C AVAILABILITY NOTIFICATION                    | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33661865        | GPUS: FEDERAL WITHHOLDING TAX UPDATES FOR 2022                   | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33671121        | OHIO LOCAL CCA EFW2 CHANGES FOR 2021 REPORTING: MODIFY RS RECORD | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33672595_141    | GP MYS - INCOME TAX BRACKET UPDATE FY2022                        | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33685042_141    | CONSOLIDATED U.S. TAX TABLE CHANGES - TAX UPDATE 22-A            | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33714650_141    | TAX UPD 2022-REACTION TO LPGE 2022                               | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33716890_141    | GPFRA LEG CHANGE: TAX UPDATE JANUARY 2022                        | 03/15/22 11:09:58AM          | Applied             |
| updPRJ33718250        | IREN REPORT 2022 / BASE YEAR 2021                                | 03/15/22 11:09:58AM          | Applied             |

## Viewing Subscriptions

The subscriptions page displays the default channel information corresponding to the deployed PeopleSoft Image.

This example illustrates the fields and controls on the Subscriptions page.

**Subscriptions**

| Channel Name <sup>1</sup> | Description <sup>1</sup>   |
|---------------------------|----------------------------|
| HCM_92_Windows            | PeopleSoft HCM 9.2 Windows |

## Scheduling Update Jobs

From the Update Manager Homepage, select the Update Scheduler tile.

The first time you access the Manage jobs page no jobs will be defined. Use the Define Job button to define jobs. See [Defining Jobs](#).

This example illustrates the fields and controls on the Manage Jobs when no jobs have been defined.

**Manage Jobs**

No Jobs Defined. Click on Define Job.

After job have been defined and scheduled or run, the Manage Jobs page will display the Job Status.

This example illustrates the fields and controls on the Manage Jobs page. You can find definitions for the fields and controls later on this page.

Update Manager

Manage Jobs

Define Job

Manage Jobs

AllAd hocScheduled

| Actions | Name             | Type   | Last Run Datetime | Status    |   |
|---------|------------------|--------|-------------------|-----------|---|
|         | TESTDEFPKG1      | Ad hoc | 02/25/2021 8:19AM | Failed    | > |
|         | DEFCP1           | Ad hoc | 02/24/2021 8:04AM | Completed | > |
|         | APPUPTSNTAPTEST1 | Ad hoc | 02/12/2021 4:43AM | Completed | > |
|         | MYTESTPKG2       | Ad hoc | 02/12/2021 3:36AM | Completed | > |
|         | PRADEPTTEST1     | Ad hoc | 02/12/2021 2:18AM | Completed | > |
|         | APPLYPRP         | Ad hoc | 02/04/2021 9:42AM | Completed | > |
|         | DOWNLOAD         | Ad hoc | 02/04/2021 7:40AM | Completed | > |

| Field or Control | Description                                                                                                                                                                                                                                                             |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Actions          | Actions include: <ul style="list-style-type: none"><li>Delete<br/>Select to delete a job.</li><li>Run<br/>Select to run a job.</li><li>Resume<br/>Select to resume a failed job or after a manual stop.</li><li>History<br/>Select to review the job history.</li></ul> |
| >                | Use the > icon to view the Job Monitor.<br>The Job Monitor can also be accessed by clicking the row.<br>For details, refer <a href="#">Viewing Job Monitor</a>                                                                                                          |

Defining Jobs

Select the Define Job button on the Manage Jobs page to define a new PAU job.

This example illustrates the fields and controls on the Define Job page. You can find definitions for the fields and controls later on this page.

Define Job

Define Job

RunSaveCancel

NameTEST

TypeAd hoc

Download Application Update Image

No

Download PRPs from MOS

No

Apply PRPs to PUM Source

No

Define Change Package

No

Create Package

No

Apply CP (IP: Source Only Steps)

No

| Field or Control                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                              | Enter a job name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Type</b>                              | <p>Select the job type:</p> <ul style="list-style-type: none"> <li>• <b>Ad hoc</b><br/>The job can be triggered from the Define Job page or the Manage Jobs page.</li> <li>• <b>Scheduled</b><br/>The job will run at the scheduled time. You can set a recurrence schedule.<br/><b>Note:</b>Scheduled Jobs cannot be run on an ad hoc basis through the Managed Jobs page. In case of failure or manual stop, the job can be resumed but not run on an ad hoc basis.</li> </ul>                                                                                                                                                                                                                 |
| <b>Download Application Update Image</b> | <p>Select Yes to download Application Update Image DPKs.</p> <p>Starting with PeopleTools 8.60, customers can download an Application Update Image DPKs from the Update Manager (Define Job) page. Customer will be able to download Application Update Image DPK based on the application pillar environment in use. For example, you can schedule or download HCM Application Update Image DPKs from an HCM PUM source.</p> <p><b>Note:</b> You can continue to download Application Update Image DPKs manually from My Oracle Support or Oracle Software Delivery Cloud as in previous releases.</p> <p>For more details, refer <a href="#">Downloading Application Update Image DPKs</a></p> |
| <b>Download PRPs from MOS</b>            | <p>Select Yes to download PRPs from MOS.</p> <p><b>Note:</b> The Download Manager validates each PRP before downloading and ignore PRPs that are incompatible with the currently installed PeopleSoft Image.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Apply PRPs to PUM Source</b>          | Select Yes to Apply PRPs to PUM Source.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Define Change Package</b>             | <p>Select Yes to Define Change package using Previously Defined or Standard System search criteria.</p> <p>See <a href="#">Defining Change Package</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Create Package</b>                    | Select Yes to create the defined change package.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Apply CP (IP: Source Only Steps)</b>  | <p>Select Yes to apply the source only steps.</p> <p>The Source Steps Only option runs the initial pass on the PUM source and creates all files that are contained in the change package. Once the initial pass has completed, a modified change package is created that contains all the files. The modified update change package can then applied to the target database using the Target Only option.</p>                                                                                                                                                                                                                                                                                    |

# Scheduling Jobs

On the Define Job page, select Type: Scheduled.

This example illustrates the fields and controls on the Defining Scheduled Job. You can find definitions for the fields and controls later on this page.

Define Job

Define Job

SaveCancel

Name

DOWNLOAD

Type

Scheduled

Recurrence

Daily

Daily Purge

HTML\_Email

M-F at 5pm

MILDAILY

PerfMon Reaper Recurrence

RP\_INIT

TL\_DAILY

Weekly - Friday

Download

Download

Apply PRPs to PUM Source

Define Change Package

Create Package

Apply CP (IP: Source Only Steps)

No

No

No

No

No

No

| Field or Control | Description                                                                                                                                                                                                 |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type             | Scheduled                                                                                                                                                                                                   |
| Run Date         | Select the date and time to run the job.                                                                                                                                                                    |
| Recurrence       | Use this option to set up the job on a recurring schedule. Select the recurrence name from the drop down list.<br>To add a new recurrence definition see Process Scheduler: Defining Recurrence Definitions |

# Downloading Application Update Image DPKs

On the Define Job page, select Download Application Update Image.

You can run a job for this Download Application Update Image task on an ad hoc or scheduled basis.

ⓘ

Note

The Download Application Update Image task cannot be combined with other tasks, such as, Create Package. It requires a separate job to run.

This example illustrates the fields and controls to download Application Update Image DPK.

Define Job

Define Job

RunSaveCancel

NameTEST

TypeAd hoc

Download Application Update Image

Yes

Image for Virtual BoxYes

Image for WindowsNo

Image for LinuxNo

File DirectoryC:\HCM02A\Download\DPK

Download PRPs from MOS

No

Apply PRPs to PUM Source

No

Define Change Package

No

Create Package

No

Apply CP (IP: Source Only Steps)

No

| Field                                                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Image for Virtual box, Image for Windows, Image for Linux | The three types of Application DPKs or Update Image patch sets that is available for download.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| File Directory                                            | <p>Specify the directory to download the DPK. It can be any relevant path in Process Scheduler to which PAU has access.</p> <p>It can be a local path or network path (Windows or Linux machine).</p> <p>In Windows, it is not recommended to use mapped shared folder as download location for the PAU DPK. If shared folder path is provided, it is recommended to provide the complete UNC path.</p> <p>Example of UNC path is, \\server-name\shared-resource-pathname.</p> <p>This directory is validated to check if sufficient space is available on file system for the current download job.</p> |

Note that when any PAU job runs, the other PAU jobs, such as download or apply PRP and create or define Change Package, are in queue.

## Defining Change Package

When you select to Define a Change Package, you will need to enter additional information.

After you Save the job, you can run the job directly from this page using the Run button.

This example illustrates the fields and controls on the Define Job page for defining a change package PAU job.

Define Job

Define Job

RunSaveCancel

Name

DEFINECP

Type

Ad hoc

Download Application Update Image

No

Download PRPs from MOS

No

Apply PRPs to PUM Source

No

Define Change Package

Yes

Package Name

TAXUPDATES

Target DB

HRBALA

Package Suffix

Date(yyymmdd)

Search Scope

Standard System

Package Description

Current Tax Updates

Search Name

All Tax Updates Not Applied

Create Package

No

Apply CP (IP: Source Only Steps)

No

| Field or Control        | Description                                                                                                          |
|-------------------------|----------------------------------------------------------------------------------------------------------------------|
| Package Name            | Enter a name for the change package.                                                                                 |
| Package Suffix          | Select a suffix, choices are: <ul style="list-style-type: none"><li>Date(yyymmdd)</li><li>Date(yymmdd)</li></ul>     |
| Package Description     | Optionally add a description.                                                                                        |
| Target DB               | Select the target database from the drop down list.                                                                  |
| Select the Search Scope | Search Scope choices are: <ul style="list-style-type: none"><li>Previously Defined</li><li>Standard System</li></ul> |
| Search Name             | Select the search name from the drop down list.                                                                      |

## Creating and Applying Change Packages

You can define a change package and create the change package in different PAU jobs. These two jobs are completely independent.

Prior to PeopleTools 8.60, you had to define and create change packages in a single job.

Use the Create Package task in PAU job to create change packages that are either defined in the Define Change Package wizard in the Update Manager tile or in the PAU job.

This example illustrates the fields and controls to search for the change packages defined in Update Manager tile or in the PAU job.

Define Job

Define Job

Run

Save

Cancel

Name

TEST

Type

Ad hoc

Lookup

Cancel

Search for: Package Name

Search Criteria

Package Name (begins with) TEST

Package Type

Database Name (begins with)

Search

Clear

Show Open

Download Application Update Image

Download PRPs from MOS

Apply PRPs to PUM Source

Define Change Package

Create Package

Package Name

Apply CP (IP: Source Only Steps)

Search Results

Package Name T1

Package Type T1

Database Name T1

|         |        |        |
|---------|--------|--------|
| TEST1   | Update | HRBALA |
| TEST123 | Update | HRBALA |
| TEST345 | Update | HRBALA |
| TEST66  | Update | HRBALA |
| TEST77  | Update | HRBALA |
| TEST987 | Update | HRBALA |

Select the Apply CP (Source Only Steps) option, to apply the change package created. This option applies only the source only steps.

Viewing Job History

Select the History action from the Manage Jobs page to view the job history.

This example illustrates the fields and controls on the Job History page. You can find definitions for the fields and controls later on this page.

Manage Jobs

Job History

TESTCPAPPLY

Return to Manage Jobs

04/22/2022 4:44 AM

Status COMPLETED

| Activity                | Status    | View Job Template |
|-------------------------|-----------|-------------------|
| 1 Create Change Package | Completed |                   |
| 2 Apply Change Package  | Completed |                   |

Download Logs

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Status           | <p>There are two status fields.</p> <p>Job level status- Displays the current status of the job. The status can be <b>COMPLETED</b> only when the all the activities within the job has a <b>COMPLETED</b> status.</p> <p>Activity level status- Displays the status of an activity in the job.</p> <p>Select to view the job template detail.</p> <p>This template appears only for Apply Change Package and Apply PRP tasks.</p> |

Change Assistant and Update Manager  
G47469-01  
Copyright © 1988, 2026, Oracle and/or its affiliates.

July 20, 2026  
Page 14 of 19

| Field or Control                                                                  | Description                                  |
|-----------------------------------------------------------------------------------|----------------------------------------------|
|  | Select to view the job log for the activity. |
| <b>Download Logs</b>                                                              | Select to download the logs.                 |

## Viewing Job Monitor

Use the Job Monitor to monitor the status of job activities, logs, and download logs.

To view the Job Monitor, from the on the Manage Jobs page either click the row for the job or use the > icon.

This example illustrates the fields and controls on the Job Monitor page. You can find definitions for the fields and controls later on this page.

< Update Manager

Job Monitor







Job Monitor

Resume

Return to Manage Jobs

Name

TESTDEFPKG1

Type

Ad hoc

Status

Failed

Run Date Time

02/25/2021 8:19AM

| Activity                | Start Date time   | End Date time     | Status    |
|-------------------------|-------------------|-------------------|-----------|
| 1 Define Change Package | 02/24/2021 8:08AM | 02/24/2021 8:10AM | Completed |
| 2 Create Change Package | 02/24/2021 8:08AM | 02/24/2021 8:12AM | Completed |
| 3 Apply Change Package  | 02/24/2021 8:08AM | 02/25/2021 8:19AM | Failed    |

Download Logs

| Field or Control                                                                    | Description                                                            |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------|
|  | Select to view the job template.                                       |
|  | Select to view the job log.                                            |
| <b>Download Logs</b>                                                                | Select to download a zip file which includes all the logs for the job. |

This example illustrates the fields and controls on the Job Detail Template. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Job Detail Template' page for a software update job. The job ID is 'softwareupdateTESTDEFPKG1\_20210224{H92909W1-J}P20210225101513'. The job is titled 'TESTDEFPKG1 - Apply Change Package'. The left sidebar lists the following tasks:

- Planning Your Application Changes (Completed)
- Running the Initial Filters (Completed)
- Preparing for Application Changes (Completed)
- Completing Application Changes (Completed)
- Execute File References (Completed)
- Completing Security Related Tasks (Failed)
- Administrative and Cleanup Tasks (Ready)

The main content area shows the details for the 'Running the Initial Filters' task. It includes a 'Task Description' section with the text: 'Running the Initial Filters. This Task runs the Initial Filters. Initial Filters include - Release Adaptor - Initial Filter Queries (if applicable)'. Below this is a 'Step Description' section with a table listing activities:

| Activity Name                                    | Status    |
|--------------------------------------------------|-----------|
| Running the Initial Filter Queries on the Source | Completed |

The list of chapters, tasks and steps are listed on the left hand side of the page. Select the chapter, task or step to view.

## Resuming a Job

Select the Resume button on the Job Monitor page to resume a job.

You can resume a job:

- If the job encounters a manual stop.
- If a PRP fails with 'Applied with Warnings' status.

If the job encounters a manual stop, the user must mark the step as complete and continue to run the job.

If the job fails for on a step in the template, the user can select to either Mark the step as manually complete and continue to run the job or Mark the step to restart and continue to run the job.

This example illustrates the fields and controls on the Resume Job. You can find definitions for the fields and controls later on this page.

**Resume Job**
Close

Failed at step Copying EODP\_SYSDATA\_EXP\_DMS to Staging Directory

Apply Change Package has Failed

To Continue the job, Please choose the required action

☐ Mark the step as manually complete and continue to run the job  
☒ Mark the step to restart and continue to run the job

Continue

Sometimes a PRP fails when a job stops with the 'Applied with warnings' status. Review the warnings to fix the issue and resume to apply the PRP from the Job Monitor page.

## Viewing Download Repository

From the Upgrade Manager Homepage, select the Download Repository tile to view the downloaded PRPs.

This example illustrates the fields and controls on the Download Repository page.

| Downloaded From MOS                                                              |                            |               |           |
|----------------------------------------------------------------------------------|----------------------------|---------------|-----------|
| Name                                                                             | Downloaded Datetime        | Artifact Type | File Size |
| MODIFY TAX810CO.SQR FOR NEW REPORTING PERIOD DATE FORMAT EFF Q4-2020             | 2021-02-04T07:40:00.000000 | MOS - PRP     | 582.81 KB |
| MODIFY TAX960LC TO BLANK FILL REC 298-307 FOR COLUMBUS, OH                       | 2021-02-04T07:40:00.000000 | MOS - PRP     | 617.15 KB |
| ADMINISTER CREATE DELEGATION DOES NOT WORK WHEN DELEGATE HAS MULTIPLE JOBS       | 2021-02-04T07:40:00.000000 | MOS - PRP     | 584.66 KB |
| SOURCE TAX REVISION 2021 - MULTIPLE PAYMENTS ISSUE FOR HOURLY EMPLOYEES          | 2021-02-04T07:40:00.000000 | MOS - PRP     | 830.85 KB |
| HCM ACA PRIOR YEARS MANIFEST FILE USING TY2020V1.0 SCHEMAAS OF MID JAN 2021      | 2021-02-04T07:40:00.000000 | MOS - PRP     | 908.72 KB |
| GPUS: FEDERAL WITHHOLDING TAX UPDATES FOR 2021                                   | 2021-02-04T07:40:00.000000 | MOS - PRP     | 866.75 KB |
| TAX UPD 2021 - CRETA CHANGES DUE RED BULLETIN 2020/20: CONCENTRATE SCHEDULE      | 2021-02-04T07:40:00.000000 | MOS - PRP     | 745.22 KB |
| GP MEX: SUB EMP PAG DEDUCTION IS NOT BEING CALCULATED FOR SOME EMPLOYEES         | 2021-02-04T07:40:00.000000 | MOS - PRP     | 1.16 MB   |
| GP NZL - SL THRESHOLD & TAX RATE - STATUTORY CHANGES EFFECTIVE 1ST OF APRIL 2021 | 2021-02-04T07:40:00.000000 | MOS - PRP     | 1.36 MB   |
| GP FRA LEG CHANGE: TAX UPDATE JANUARY 2021                                       | 2021-02-04T07:40:00.000000 | MOS - PRP     | 640.69 KB |
| DELIVER XMLP UPDATES FOR AS, GU AND VI TO SUPPORT YEAR-END 2020                  | 2021-02-04T07:40:00.000000 | MOS - PRP     | 1.11 MB   |
| TAX UPD 2021-CHANGES ON TAX ALGORITHM DUE LPGE 2021                              | 2021-02-04T07:40:00.000000 | MOS - PRP     | 973.09 KB |
| GPFR: DSN EVENT REPORTING SHOULD SPLIT FILE PER EMPLOYEE/EVENT                   | 2021-02-04T07:40:00.000000 | MOS - PRP     | 728.15 KB |

Click on a row or use the > icon to view the PRP details. Details will list the bugs and patch files included in the PRP.

This example illustrates the fields and controls on the PRP Details page.

×

**Details**

**BUG Number** 32375152

**Description** ADMINISTER CREATE DELEGATION DOES NOT WORK WHEN DELEGATE HAS MULTIPLE JOBS

**Language** American English

**Translation Available** No

**Classification** General

**Last Update Date/Time** 02/02/21 12:51:09

**Release Date/Time** 02/02/21 12:51:09

**Patch Location** C:\MyWork\Development\PT859909W\_MT\pt\CA\download\prp\generic\HCM\37\updPRJ32375152...

**Fixed Bugs**

| BUG Number | More Information                                                           |
|------------|----------------------------------------------------------------------------|
| 32377802   | PERFORMANCE OF EOEN_ALERT APP ENGINE PROCESS                               |
| 32375152   | ADMINISTER CREATE DELEGATION DOES NOT WORK WHEN DELEGATE HAS MULTIPLE JOBS |

**Patch Files**

| File Name              | File Size |
|------------------------|-----------|
| updPRJ32375152_I37.zip | 584.66 KB |

## Viewing Maintenance Levels of Non-Source Environment

The About Applied Updates page lets customers know how current is their non-source environment. The non-source environment can be development, test, or production database where the change packages are applied.

The maintenance related data, which is used to assess how current is the non-source environment, resides in the PUM source. The Change Package Apply process transfers this data to the non-source environment.

Users with the PTPT4310 permission list and the Lifecycle Updates role can view the About Applied Updates page (PeopleTools, LifeCycle Tools, About Applied Updates).

This example illustrates the fields and controls on the About Applied Updates page.

About Applied Updates

Environment Information

Database EP86002A

Tools Version 8.60

Current to Image

|                                                      |    |
|------------------------------------------------------|----|
| All Delivered Fixes                                  | 46 |
| All Delivered Fixes For Installed Product            | 46 |
| All Delivered Regulatory Fixes For Installed Product | 46 |
| Most Recent Image of Any Applied Fix                 | 47 |

Last Applied Package Details

Package Name AAR\_TEST

Target Used to Create Package IN14V

Apply Date 11/04/2016

The Current to Image section on About Applied Updates page lets know the customers how current is their non-source environment.

This information is displayed to PUM administrator as well. For details, refer [Managing Databases](#) and [Viewing Maintenance Levels of Target Environment](#)

# Using Update Manager Dashboard

## Update Manager Dashboard Overview

The Update Manager Dashboard provides a central location for all update tasks. The dashboard provides analytics for PUM (PeopleSoft Update Manager) that assist in determining your current level of maintenance. The various pivot grids provided on the dashboard, provide access into the maintenance logs and bug information for each database uploaded to the PeopleSoft Update Image. After drilling down onto a specific pivot grid, you can select bugs to include in a change package.

This example illustrates the fields and controls on the Update Manager Dashboard. You can find definitions for the fields and controls later on this page.



See [Using PeopleSoft Update Manager \(PUM\) Analytics](#)

The left navigation pane of the Update Manager Dashboard provides links to Update Manager features and pages. When you select a link from the left navigation pane, the corresponding page appears in the target content area. The following folders make up the Update Manager Dashboard.

| Folders                  | Description                                                                                                                                                                                                                                                                      |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Target Database   | This folder contains a list of all the target database that have been uploaded to the PUM Source. When you select a database Push Notifications is used to refresh the Pivot Grid tiles in the dashboard.<br>See <a href="#">Using PeopleSoft Update Manager (PUM) Analytics</a> |
| Define Change Package    | This folder contains links to the various types of change packages.<br>See <a href="#">Defining Change Package</a>                                                                                                                                                               |
| Change Package Utilities | This folder contains links to Change Package utilities.<br>See <a href="#">Using Change Package Utilities</a>                                                                                                                                                                    |
| Test Repository          | This folder contains links to the tasks necessary for managing test repository.<br>See <a href="#">Understanding Test Repository</a>                                                                                                                                             |
| About PeopleSoft Image   | Use the About PeopleSoft Image page to display information about the PeopleSoft Image.                                                                                                                                                                                           |

Information for working with and customizing Dashboards is provided elsewhere in PeopleTools product documentation. See the product documentation for PeopleTools 8.59: Using PeopleSoft Applications

## About PeopleSoft Image

Use the About PeopleSoft Image page to display information about the PeopleSoft Image.

Navigation:

Select **PeopleTools**, and then **Lifecycle Tools**, and then **Update Manager**, and then **About This PeopleSoft Image**

This example illustrates the fields and controls on the About PeopleSoft Image page.

The screenshot shows the 'About PeopleSoft Image' dashboard. At the top, there's a navigation bar with 'Start Page', 'About PeopleSoft Image', and links for 'New Window', 'Help', and 'Personalize Page'. The main content area is divided into three sections:

- About PeopleSoft Image:** A table showing database and tools information.
 

|               |          |                   |      |
|---------------|----------|-------------------|------|
| Database      | H92PUM01 | Tools Version     | 8.59 |
| Description   |          | Tools Patch Level | 1    |
| Base Language | ENG      | PI Version        | 35   |
| Image Type    | External | Template Version  | 35   |
- Installed Languages:** A section with a search bar and a table showing installed languages.
 

| Language Code |
|---------------|
| English       |
- Included Bugs:** A section with a search bar and a table showing included bugs.
 

| BUG Number | Product | Subject                                                                          | Fixed Date | Details |
|------------|---------|----------------------------------------------------------------------------------|------------|---------|
| 11253102   | HR      | PSFT 500892000-ADMINISTER WORKFORCE: HIGHLIGHTED FIELDS REQUIRED ERROR DURING RE | 02/21/2017 |         |
| 11460124   | PY      | UNEXTRACTED VOUCHERS CAUSE DUPLICATE KEY ERROR WHEN RERUNNING PY                 | 06/10/2014 |         |

## Using PeopleSoft Update Manager (PUM) Analytics

The Update Manager Dashboard provides analytics for PUM (PeopleSoft Update Manager) that assist in determining your current level of maintenance. The Update Manager Dashboard is available on the PeopleSoft Update Image. The various pivot grids provided on the dashboard, provide access into the maintenance logs and bug information for each database uploaded to the PeopleSoft Update Image.

By default the Update Manager Dashboard has twelve tiles with the following pivot grids:

1. Database Bug Status
2. Bug Percent by Tag
3. Bug Percent by Image
4. Bugs by Product
5. Enhancements by Image
6. Enhancements by Prod
7. Enhcmnt by Min Tools
8. Applied Bugs by Image
9. Bugs by Language
10. Bugs by Image From
11. Bugs by Dependency
12. Customization Impacts

Bugs are categorized by into four distinct groups:

- Applied Bug Fixes for installed products  
All bug fixes that have been applied to the target database for installed products.
- Applied Bug Fixes for non-installed products

All bug fixes that have been applied to the target database for non-installed products.

- Unapplied Bug Fixes for installed products

Use the unapplied bug fixes for installed products to determine how far behind the target database is compared to the current PeopleSoft Update Image. If there are no unapplied bug fixes for installed products, the target database is current.

- Unapplied Bug Fixes for non-installed products

Unapplied bug fixes for non-installed products will not have any effect on target database.

## Reviewing Bugs and Enhancements Using the Pivot Grid

### Displaying Analytics

To display analytics for a specific target database and pivot grid:

1. Expand the Select Target Database folder and click the link for the database to display.
2. Click on one of the pivot grid tiles to open Pivot Grid Viewer.
3. Use the Show Filters icon to display the available filters on the left-hand side of the pivot grid.
4. The grid showing the bugs that match the filter criteria is displayed.

### Applying Filters

Use the Show Filters icon to display the available filters on the left-hand side of the pivot grid. Once you select a filter, the pivot grid will be refreshed with the current filters. The following filters are available for the pivot grids:

- Bug Status  
Applied or Unapplied
- Image
- Bug Severity
- Product
- Product Installed
- Component
- Sub Component

### Reviewing the Grid

Once you open a pivot grid and apply the filters, all of the bugs meeting the specified criteria are displayed with the following columns:

- Action check box
- Database
- Bugs
- Image Number
- Subject
- Bug Severity
- Bug Status

- Product Name
- Product Installed
- Bug Type
- Component
- Sub Component
- Posted date

Certain pivot grids have additional columns:

- *Database Bugs by Tags* includes columns for Tag Name and Tag Value.
- *Enhancements by Minimum Tools* includes a column for Minimum Tools.
- *Applied Bugs by Image Lag* includes a column for Image Lag.

This example illustrates the fields and controls on the grid. You can find definitions for the fields and controls later on this page.

| Actions                  |          | Select All | Clear        |                                                                              |                        |            |                        |                   |          |      |  |  |  |
|--------------------------|----------|------------|--------------|------------------------------------------------------------------------------|------------------------|------------|------------------------|-------------------|----------|------|--|--|--|
| Actions                  | Database | Bugs       | Image Number | Subject                                                                      | BUG Severity           | Bug Status | Product Name           | Product Installed | Bug Type | Corr |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 22762096   | 18           | NOT ALL ELEMENTS ARE PRESENT IN FORECAST DETAILS IN SS EXTENDED ABSENCE PAGE | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 24373484   | 19           | ABSENCE CANCELTION - MODIFICATION FOR EXISTING ADMINISTRATOR OBJECTS         | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 24405541   | 19           | NEW CODE FOR ABSENCE CANCELTION                                              | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 24405978   | 19           | ABSENCE CANCELTION NEW OBJECTS FOR ADMINISTRATORS                            | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 24451507   | 19           | ABSENCE CANCELTION FROM ADMINISTRATOR AWE EVENT ENTRY FOR 854                | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 24406140   | 19           | ABSENCE CANCELTION NEW OBJECTS FOR FLUID                                     | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |
| <input type="checkbox"/> | H92CDTGT | 24417952   | 19           | ABSENCE CANCELTION FROM CLASSIC PAGES FOR 854                                | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | Abse |  |  |  |

| Field or Control | Description                                                                                                                  |
|------------------|------------------------------------------------------------------------------------------------------------------------------|
| Actions          | After selecting bugs, by checking the Actions column in the grid, use the Actions drop down to select Add to Change Package. |
| Select All       | Click this button to select all bugs.                                                                                        |
| Clear All        | Click this button to clear all bugs.                                                                                         |

## Creating a Change Package From the Pivot Grid

To use the pivot grid to select bugs for your change package:

1. Double-click the pivot grid.
2. Set the filters to use.  
You may want to include the filter for Unapplied.
3. Review the bugs listed in the grid and select the Action check box for the bugs you want to include in your Change Package.

This example illustrates bugs selected to add to a change package.

Actions Select All Clear

| Actions                             | Database | Bugs     | Image Number | Subject                                                                      | BUG Severity           | Bug Status | Product Name           | Product Installed | Bug Type |   |
|-------------------------------------|----------|----------|--------------|------------------------------------------------------------------------------|------------------------|------------|------------------------|-------------------|----------|---|
| <input checked="" type="checkbox"/> | H92CDTGT | 22762096 | 18           | NOT ALL ELEMENTS ARE PRESENT IN FORECAST DETAILS IN SS EXTENDED ABSENCE PAGE | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | / |
| <input checked="" type="checkbox"/> | H92CDTGT | 23092140 | 18           | LINKS ON ABSENCE MANAGEMENT PAGES NOT TRANSLATED                             | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | 1 |
| <input checked="" type="checkbox"/> | H92CDTGT | 23314981 | 18           | SIMPLIFIED ANALYTICS FOR ABSENCE MANAGEMENT IN MY TEAM(LEAVE BALANCES)       | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | / |
| <input checked="" type="checkbox"/> | H92CDTGT | 22558112 | 18           | MULTIPLE ABSENCE REQUEST PAGE IN MSS REQUIRES SAVE AFTER APPROVING ABSENCE   | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | / |
| <input checked="" type="checkbox"/> | H92CDTGT | 23258404 | 18           | TILE FOR ABSENCE MANAGEMENT NAVIGATION                                       | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | / |
| <input checked="" type="checkbox"/> | H92CDTGT | 23085534 | 18           | CREATE DELEGATION REQUEST INSTRUCTIONS USING WRONG FIELD NAMES               | Severe Loss of Service | Unapplied  | HCM Absence Management | Installed         | BugFix   | 1 |

4. Click the Actions drop down and select Add to Change Package.
5. The Enter Change Package Name page is displayed.

This example illustrates the fields and controls on the Enter Change Package Name. You can find definitions for the fields and controls later on this page.

Enter Change Package Name

Action 

Create

Name 

ABS\_BUGS\_33

Description 

Absence Management bugs

Next

| Field or Control | Description                                                                                                                        |
|------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Action           | By default the action is Create. If you want to add the bugs to an existing Change Package that has not been applied, select Edit. |
| Name             | Enter a name for the change package. If the action is Edit, select an existing package.                                            |
| Description      | Enter a description.                                                                                                               |

6. Click Next.

7. The change package wizard will open on Step 6 of 6.

See [Define Update Package Wizard Step 6 of 6](#).

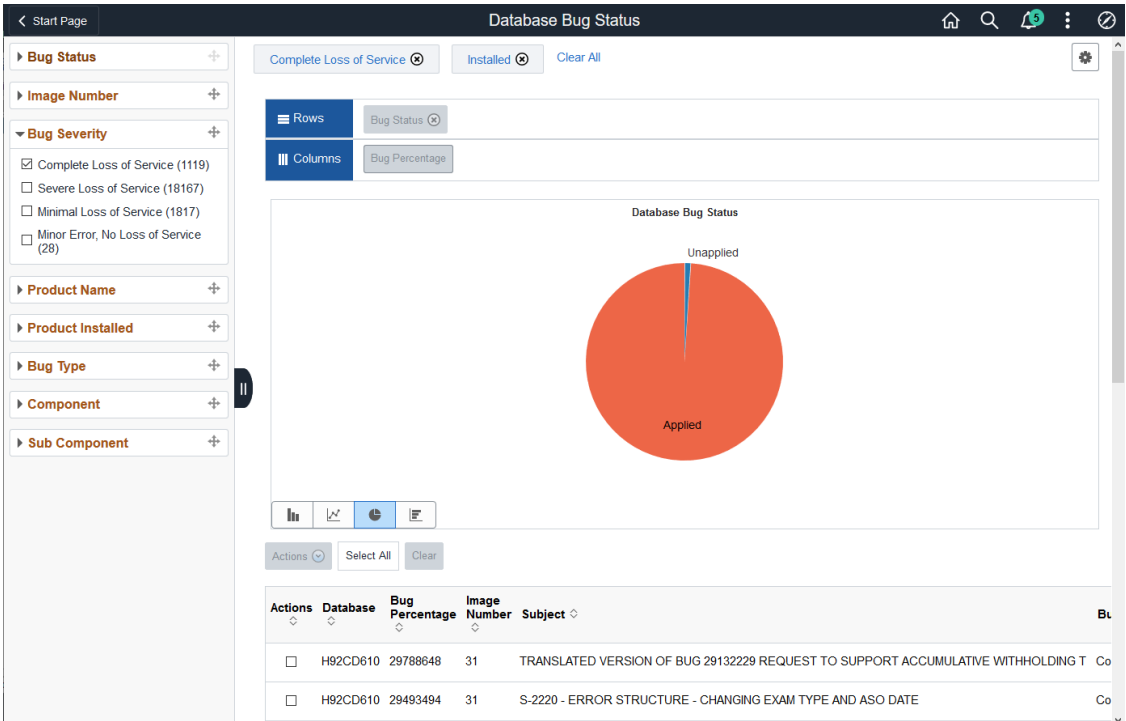
## Database Bug Status

This pivot grid displays the status of all installed products. Use the filters to determine what bugs need to be applied.

This example illustrates the fields and controls on the Database Bug Status pivot grid. This example displays the pivot grid filtered by Installed products and Complete Loss of Service.

Change Assistant and Update Manager  
G47469-01  
Copyright © 1988, 2026, Oracle and/or its affiliates.

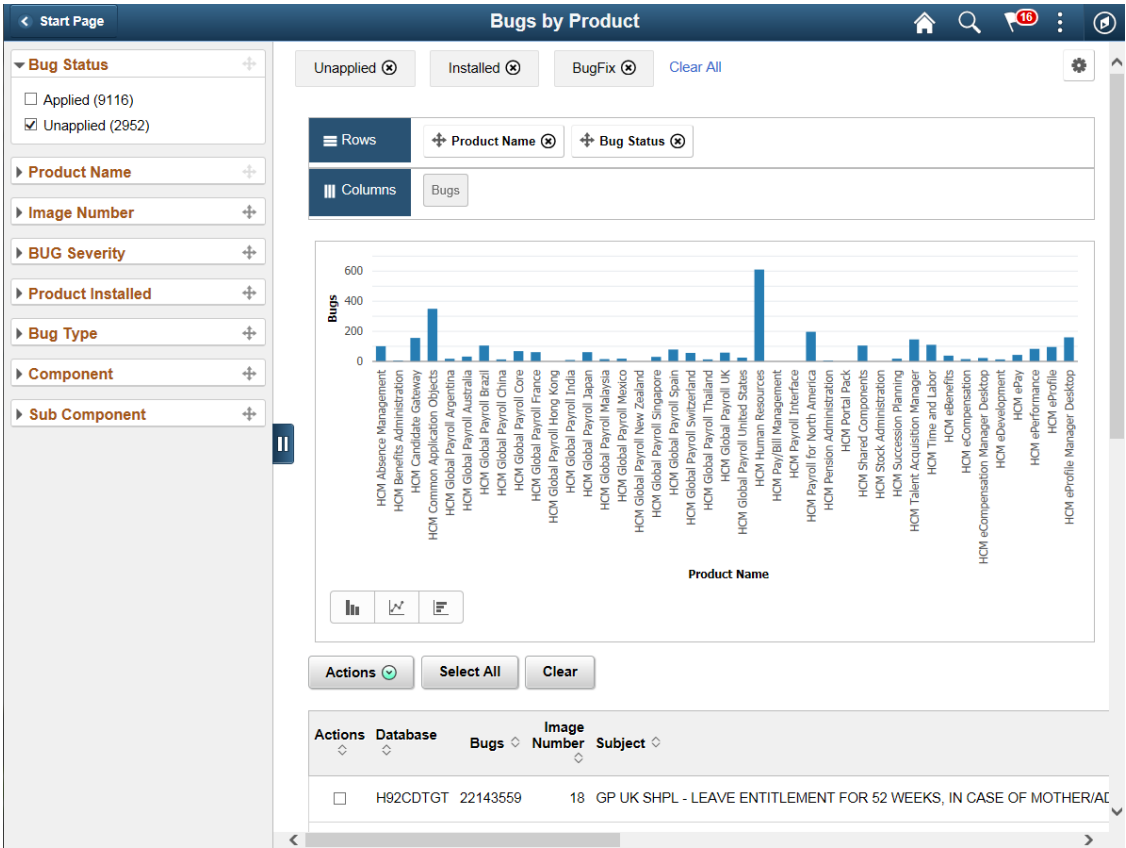
July 20, 2026  
Page 6 of 23



## Bugs by Product

This pivot grid displays the status of all installed products. Use the filters to determine what bugs need to be applied.

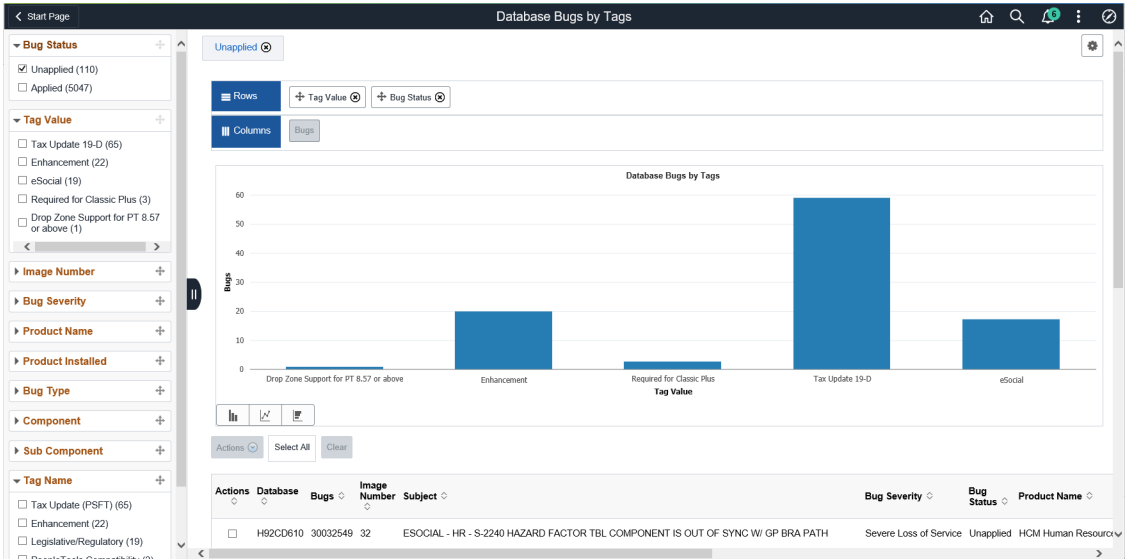
This example illustrates the fields and controls on the Bugs by Product. In this example the filter was changed to show unapplied bugs.



## Database Bugs by Tags

This pivot grid displays bug status by tag. Tag types will vary depending on the application. Use the filters to narrow down the search.

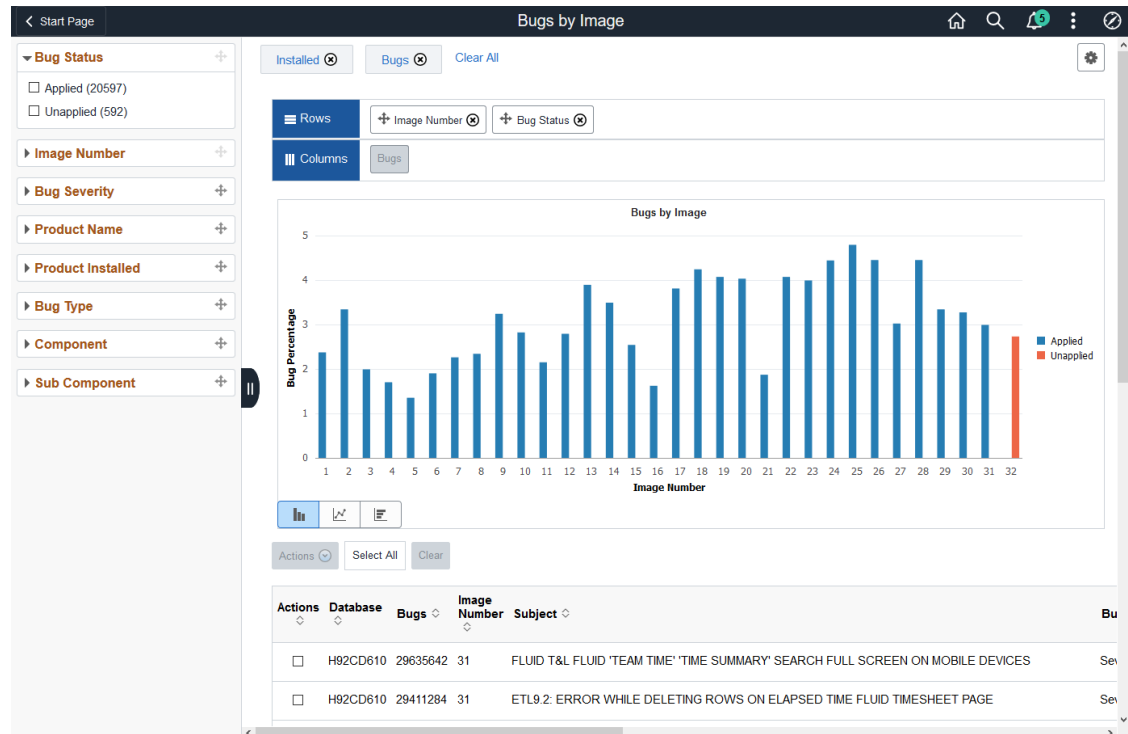
This example illustrates the fields and controls on the Database Bugs by Tags. This example id filtered by unapplied..



## Bugs by Image

This pivot grid displays the bug status by Image, which can be used to track your maintenance strategy.

This example illustrates the fields and controls on the Bugs by Image. This example shows a database that is current through image 31.



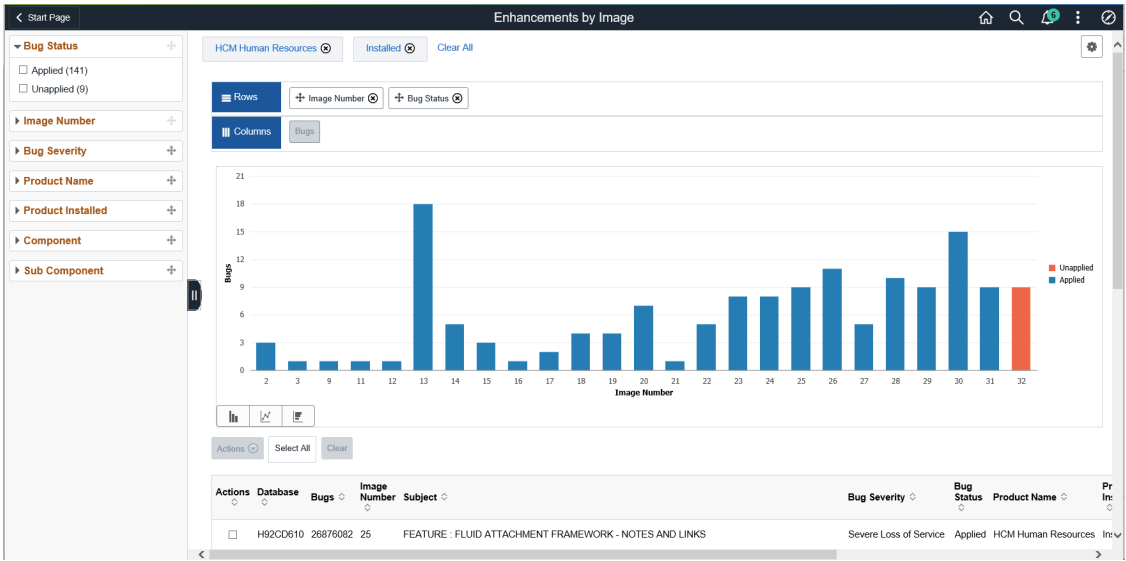
### Note

When filtering the Bug Status by Image pivot grid, select only one Product Status at a time.

## Enhancements by Image

This pivot grid displays the enhancements (and no bugs) by Image, which can be used to determine which enhancements have been applied and which enhancements you would like to apply.

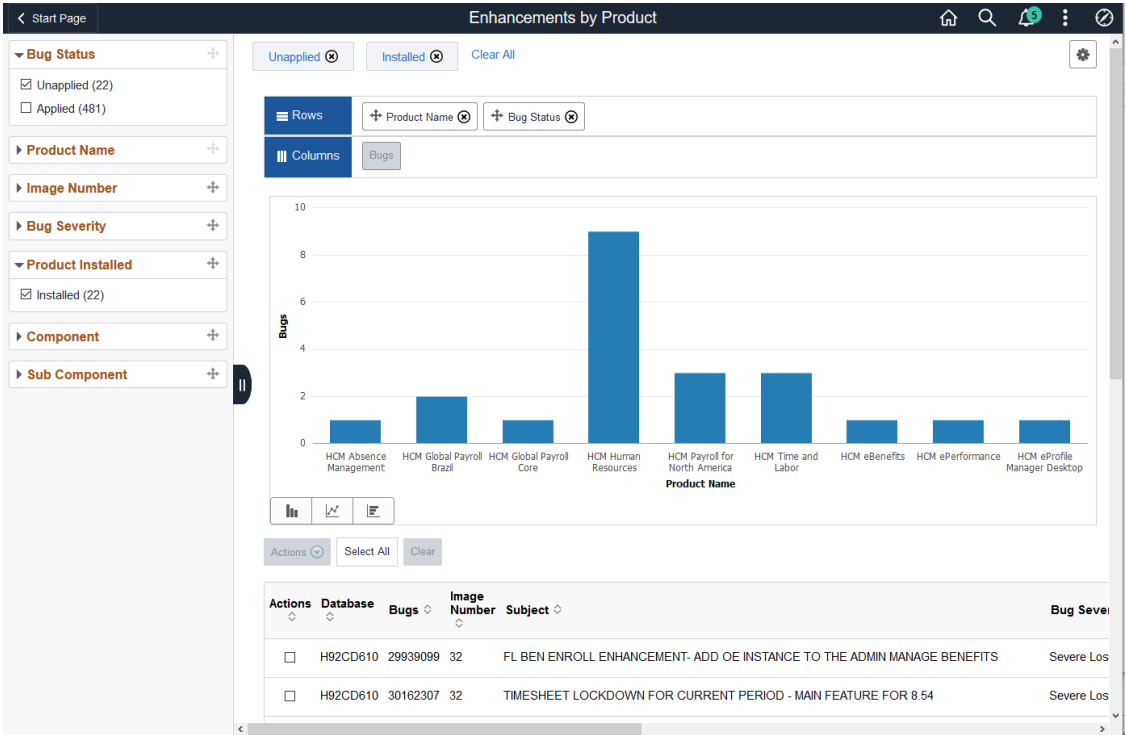
This example illustrates the fields and controls on the Enhancements by Image pivot grid filtered by product and installed..



## Enhancements by Product

This pivot grid displays the enhancements (and no bugs) by product, which can be used to determine which enhancements for a product have been applied and which enhancements you would like to apply.

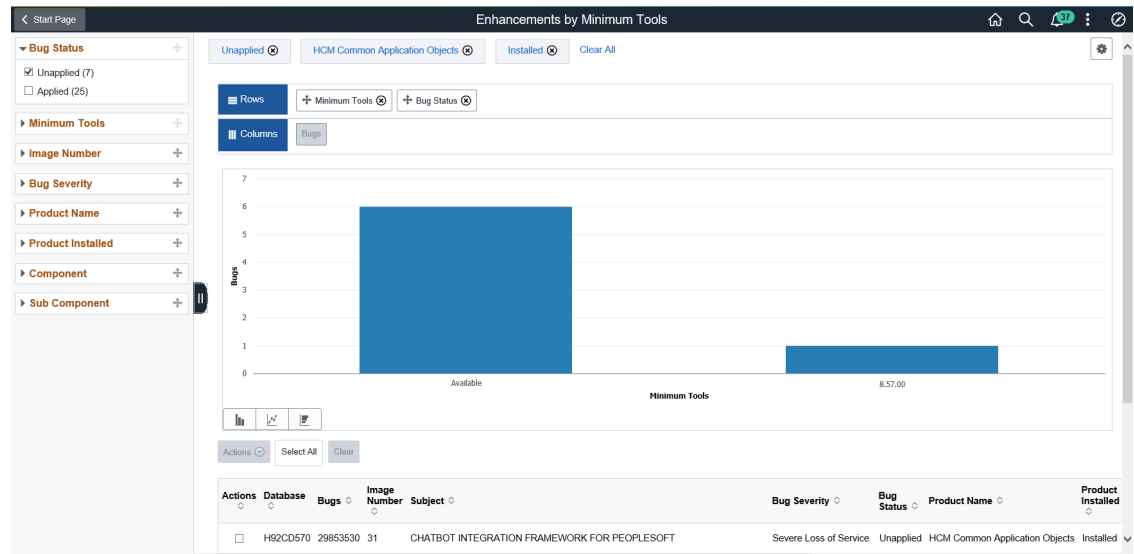
This example illustrates the fields and controls on the Enhancements by Product.



## Enhancements by Minimum Tools

This pivot grid displays the enhancements (and no bugs) that are available based on PeopleTools release for the target environment.. Use this pivot grid to determine which enhancements you can apply to your current target database, as well as what enhancements are available when you upgrade to a newer version of PeopleTools.

This example illustrates the fields and controls on the Enhancements by Minimum Tools for a target database that is on 8.56.09.



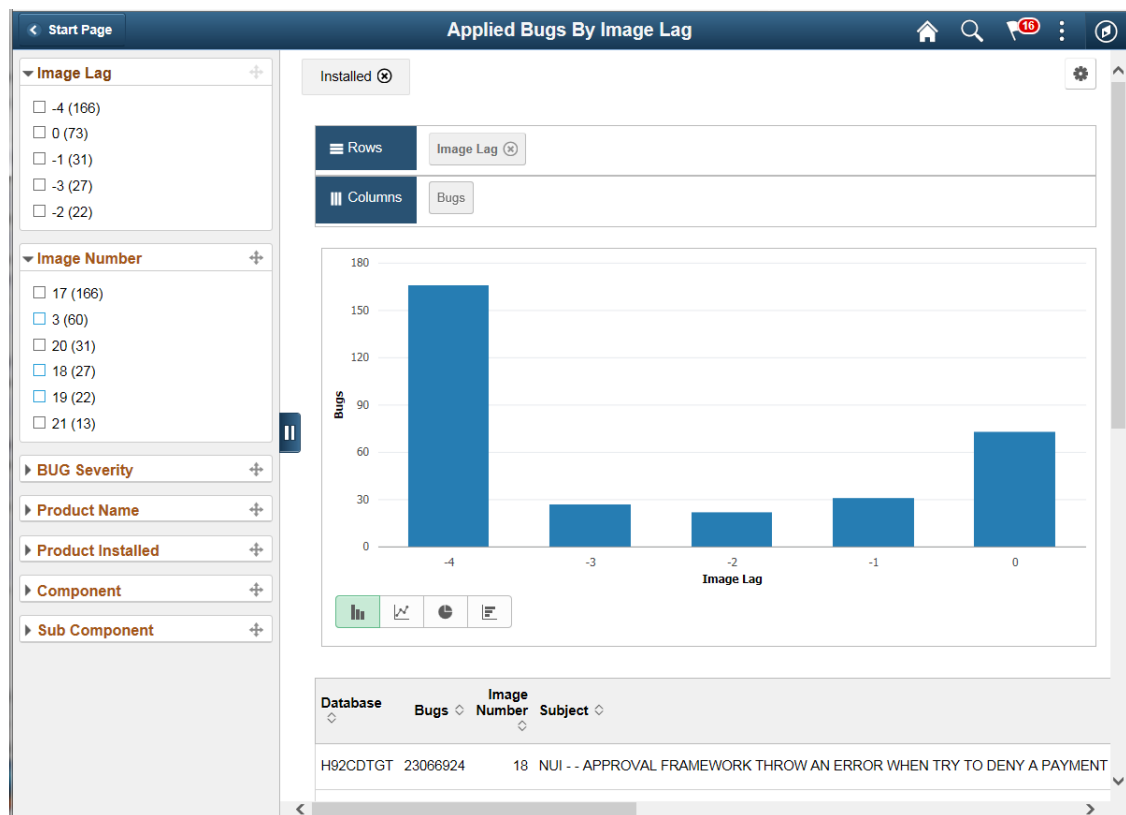
## Applied Bugs by Lag Image

This pivot grid describes the relative time to apply fixes in the system. This analytic shows the difference between when the change is delivered versus when the change is applied. If a bug is delivered in PI 15 and the customer applies the bug in PI 15, then it is 0. If the customer does not apply the bug until PI 16, it will show as -1.

### Note

If you upgrade your 9.1 application to an image point, for example PI 20, no data for lag time will be available because there will not be any applied packages defined in the database.

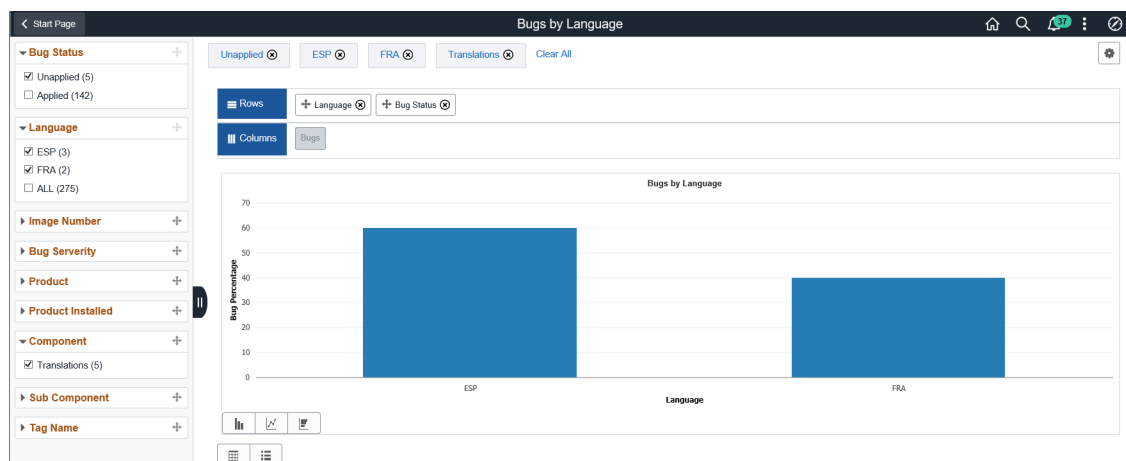
This example illustrates the fields and controls on the Applied Bugs by Lag Image. In this example, the current PI is 21 (0). For the bugs you have applied using PI 21, you can see the PI when the bug was available, image 20 (-1), image 19 (-2), image 18 (-3), and image 17 (-4).



## Bugs by Language

This pivot grid displays the multi-lingual fixes available for installed languages on the target. If the target database is English no data will appear in the pivot.

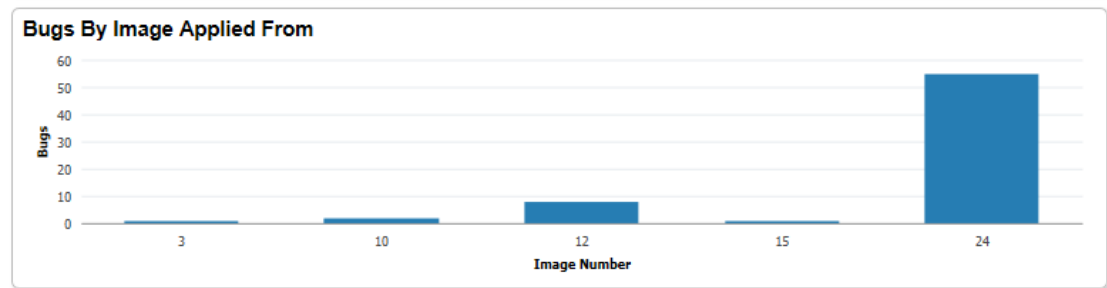
This example illustrates the fields and controls on the Bugs by Language pivot grid.



## Bugs By Image Applied From

This pivot grid displays all bugs and enhancements based on the image they were applied from.

This example illustrates the fields and controls on the Bugs By Image Applied From. You can find definitions for the fields and controls later on this page.

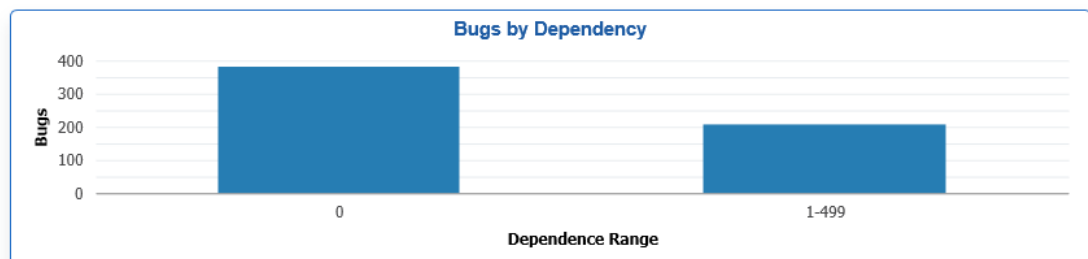


## Bugs By Dependency

This pivot grid displays the number of dependencies each bug that has not been applied on the target database. You can view information on bugs, enhancements or both using the filter option. By default both are displayed.

The x axis for this analytic contains number ranges rather than the actual number of dependencies. This limits the number of vertical bars in the grid to provide better usability, given the actual dependency data could have 1000's of possible values.

This example illustrates the fields and controls on the Bugs by Dependency pivot grid.



## Customization Impacts By Bug

This pivot grid displays the number of bugs that have not been applied on the target database that have a customization impact.

Data is only displayed on this pivot grid if:

1. Customer data on customizations has been uploaded to the PUM Source.
2. The Customization Calculation has been run on the PUM Source.

## Defining Change Packages

There are 4 types of change packages that can be created:

1. Update Package

The Update Package component is a wizard that will lead you through the process of selecting updates and defining a custom change package for your environment. It provides

a wide array of search options for selecting the updates to apply to your environment. It lets you review the details of the changes for each update before creating the change package definition, shows you what has already been applied to your environment, and automatically includes requisite updates based on what you selected and what is already applied to your environment.

**Note**

Required for Upgrade (RFU) bugs are included in the Upgrade package.

See [Defining Update Change Packages](#)

**2. Upgrade Package**

The Upgrade Package component is a wizard that will create an upgrade package based on the upgrade path specified. When you select this option 2 change package definitions are created the upgrade package (UPG) and the Required for Upgrade package (RFU).

See [Defining an Upgrade Package](#)

**3. Tools Delta Package**

The Tools Delta Package component is a wizard that is used after a PeopleTools upgrade to create a Tools delta change package that contains attributes or objects that were stripped away when the updates were applied in the old release.

See [Creating and Applying Tools Delta Package](#)

**4. Translation Delta Package**

The Translations Delta Package component is a wizard that will lead you through the process of selecting the languages and translation fixes and create a translation delta package.

See [Defining Translations Delta Package](#)

## Using Change Package Utilities

Update Manager Utilities include:

- Review Change Package
- Delete Change Package
- Merge Change Package
- Analyze Applied PRP(s)

## Reviewing Change Package

Navigation:

Select **My Update Manager Dashboard**, and then **Change Package Utilities**, and then **Review Change Package**

Select the Change Package.

You can also select the Review Package Definition link on the Define Change Package Step 6 of 6 page.

This example illustrates the fields and controls on the Review Change Package (top of page). You can find definitions for the fields and controls later on this page.

**Review Change Packages**

Database  
Description  
Package Name  
Last Updated on  
Package Status  
Package Create Date  
Package Description

H92CD640  
CANDIDATE  
03/18/2021 10:26:48AM  
Package Created  
03/18/21 12:30:28PM  
CANDIDATE

Migrated No

Search Scope All Other Search Criteria  
Dependency Calculation Standard

**Summary of Metadata for this Package**

| Metadata Type                | Status                    |
|------------------------------|---------------------------|
| Template                     | <a href="#">Available</a> |
| Included Bug Fixes           | <a href="#">Available</a> |
| Excluded Bug Fixes           | <a href="#">Available</a> |
| Included Managed Objects     | <a href="#">Available</a> |
| Included ADS Managed Objects | <a href="#">Available</a> |
| Customizations Impact        | <a href="#">Available</a> |
| Existing Tests               | <a href="#">Available</a> |
| Components To Test           | <a href="#">Available</a> |

**Included Bug Fixes**

1-5 of 188

View 100

| BUG Number | Product | Subject                                                                       | User Selected | Details |
|------------|---------|-------------------------------------------------------------------------------|---------------|---------|
| 22309274   | HR      | JOB EARNINGS DISTRIBUTION BY PERCENTAGE DOES NOT WORK FROM TBH WHILE REHIRING |               |         |

This example illustrates the fields and controls on the Review Change Package – Included Bug Fixes and Excluded Bug Fixes. You can find definitions for the fields and controls later on this page.

**Included Bug Fixes**

1-5 of 1665

View 100

| BUG Number | Product | Subject                                                                          | User Selected | Applied | User Excluded | Min Tools | Required For Upgrade | Custom Impact | Is Used | Test Exists | Requisite | Details |
|------------|---------|----------------------------------------------------------------------------------|---------------|---------|---------------|-----------|----------------------|---------------|---------|-------------|-----------|---------|
| 22508392   | PY      | MODIFY W-2/W-2C PRINT PROCESSES TO PARTIALLY MASK EMPLOYEE SOCIAL SECURITY NUMBE |               |         |               |           |                      |               |         |             |           |         |
| 22975021   | PY      | CAN: CTX910LD GENERATES WARNING FOR #INTERIM_B-1 AFTER 15-E                      |               |         |               |           |                      |               |         |             |           |         |
| 22983392   | PY      | PAYCHECK TEMPLATES USE DIFFERENT EFF DATES BETWEEN PRINTING AND ESS              |               |         |               |           |                      |               |         |             |           |         |
| 22983511   | PY      | PRENOTE REPORTS (DDP005 & DDP006) REPORT PRENOTES NOT ON DDP001 FILE             |               |         |               |           |                      |               |         |             |           |         |
| 22983818   | PY      | RETROPAY EARNINGS REMAINING IN EXTRACTED STATUS                                  |               |         |               |           |                      |               |         |             |           |         |

**Excluded Bug Fixes**

1-5 of 726

View 100

| BUG Number | Product | Subject                                                                         | User Selected | Applied | User Excluded | Min Tools | Required For Upgrade | Custom Impact | Is Used | Test Exists | Requisite | Details |
|------------|---------|---------------------------------------------------------------------------------|---------------|---------|---------------|-----------|----------------------|---------------|---------|-------------|-----------|---------|
| 21386295   | PY      | ADD NEW MESSAGE TO CALC TO IDENTIFY EMPLOYEE WITH FUTURE DATED BALANCES         |               |         |               |           |                      | Run Calc      | No      |             |           |         |
| 21785471   | PY      | LST TAXABLE GROSS CALCULATED INCORRECTLY WHEN EE HAS A PRE-TAX DEDUCTION REFUND |               |         |               |           |                      | Run Calc      | No      |             |           |         |

This example illustrates the fields and controls on the Review Change Package – Included Managed Objects and Included ADS Managed Objects. You can find definitions for the fields and controls later on this page.

| Included Managed Objects                 |                    |                     |               |         |                               |                |                |                |
|------------------------------------------|--------------------|---------------------|---------------|---------|-------------------------------|----------------|----------------|----------------|
| *Project TESTCP_20220422 1 - 700 of 6188 |                    |                     |               |         |                               |                |                |                |
| Project                                  | Object Type        | Customization Count | Is Customized | Is Used | Object Value 1                | Object Value 2 | Object Value 3 | Object Value 4 |
| TESTCP_20220422                          | App Engine Program |                     |               | No      | DC23556290                    |                |                |                |
| TESTCP_20220422                          | Activity           |                     |               | No      | REVIEW_CHANGE_FEDW4_2020_INFO |                |                |                |
| TESTCP_20220422                          | App Engine Program |                     |               | No      | DC23592503                    |                |                |                |
| TESTCP_20220422                          | Activity           |                     |               | No      | PROCESS_BATCH_FINAL_CHQ_CAN   |                |                |                |
| TESTCP_20220422                          | App Engine Program |                     |               | No      | DC22535583                    |                |                |                |

| Included ADS Managed Objects    |                |                     |                 |                        |                |                |
|---------------------------------|----------------|---------------------|-----------------|------------------------|----------------|----------------|
| *ADS Project TESTCP_20220422PTM |                |                     |                 |                        |                |                |
| Project                         | Data Set Name  | Customization Count | Data Set Record | Object Value 1         | Object Value 2 | Object Value 3 |
| TESTCP_20220422PTM              | PTPPB_GROUPLET |                     | PTPPB_GROUPLET  | HC_PY_IC_DIR_DEP_TL_FL |                |                |

This example illustrates the fields and controls on the Review Change Package – Customizations Impact and Existing Tests. You can find definitions for the fields and controls later on this page.

#### Customizations Impact

| Customization Name | Description       | Include in Package |
|--------------------|-------------------|--------------------|
| MY_CUSTOMIZATIONS  | MY_CUSTOMIZATIONS | Yes                |

#### Existing Tests

| Test Name                    | Description                  | Include in Package |
|------------------------------|------------------------------|--------------------|
| A_10270_LOCATION_CHANGE_01   | A_10270_LOCATION_CHANGE_01   | Yes                |
| A_10310_21884318ACTIVITY_01  | A_10310_21884318ACTIVITY_01  | Yes                |
| BUG17507975ASSIGNSCHED       | BUG17507975ASSIGNSCHED       | Yes                |
| BUG_17591045_NO_BASIC_SEARCH | BUG_17591045_NO_BASIC_SEARCH | Yes                |

The Review Change Package page is displayed only to provide information on the change package.

Incomplete packages will not display all of the fields.

| Field or Control      | Description                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Package Status</b> | <p>Indicates the current status of the package.</p> <ul style="list-style-type: none"> <li>Incomplete- the change package definition has not been completed in the Update Manager UI.</li> <li>Complete - the change package definition has been completed in the Update Manager UI.</li> <li>Package Created - the change package has been created in Change Assistant.</li> </ul> |
| <b>Search Scope</b>   | <p>Indicates the scope used to create the change package.</p> <p>Depending on the scope selected, additional information is displayed.</p>                                                                                                                                                                                                                                          |

| Field or Control                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Dependency Calculation</b>               | Indicates which type of dependency calculation used to create the change package (Standard or PostReq's Included).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Summary of Metadata for this Package</b> | <p>For each metadata type, if there is metadata, a link Available is displayed. Use this link to go to that section of the page.</p> <p>If the metadata type is not contained in the package, the metadata type will indicate Not Applicable.</p> <p>Bugs delivered through a PRP will have no data on components to test, therefore Components to Test will indicate No Data.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Template</b>                             | For change packages that are complete, use this link to view the steps in the change package template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Included Bugs</b>                        | For change packages that are complete, you see a grid displaying the bug in the change package, with a flag indicating the selected bugs. Use the detail icon to view bug details.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Excluded Bugs</b>                        | <p>For change packages that are complete, you see a grid displaying the list of excluded bugs in the change package.</p> <p>The Is Used field indicates interaction of objects, which are part of excluded bugs, with Usage Repository data. It can have <b>Yes</b> or <b>No</b> value.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Included Managed Objects</b>             | <p>For change packages that are complete, you see a grid listing the Managed Objects included in this package.</p> <p>The Is Used field indicates whether the object is referenced in Usage Repository. The values are:</p> <ul style="list-style-type: none"> <li>• Yes- If the managed object is referenced in the bug and the Usage Repository after usage calculation.</li> <li>• No- If the managed object is not referenced in the bug and the Usage Repository after usage calculation.</li> <li>• Not In Use- The managed objects are not uploaded in the Usage Repository.</li> </ul> <p>The Is Customized field is used to show if the object is part of the customization or not. This field can have the following values:</p> <ul style="list-style-type: none"> <li>• Yes- Object belongs to the Customization repository and is customized.</li> <li>• No- Though the object is part of Customization repository, it is a non-customized object.</li> <li>• Blank- Object does not belongs to the Customization repository.</li> </ul> |
| <b>Included ADS Managed Objects</b>         | For change packages that are complete, you see a grid listing the ADS Managed Objects included in this package.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Customization Impact</b>                 | Lists the impacted customization names.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Field or Control          | Description                                                                 |
|---------------------------|-----------------------------------------------------------------------------|
| <b>Existing Tests</b>     | Lists the existing test names that cover objects delivered in this package. |
| <b>Components To Test</b> | Lists the components to test for this package.                              |

### Bug Details

Click the Details button on the Included Bug Fixes and Excluded Bug Fixes grid to access the Bug Details page.

The Bug Details page details the bug-specific Change Package information.

Bug Details

**BUG Number** 21386295      **Minimum Tools Release(s)** 8.53.00

**Subject** ADD NEW MESSAGE TO CALC TO IDENTIFY EMPLOYEE WITH FUTURE DATED BALANCES

**Delivered in Image** 28

**Severity** 2 Severe Loss of Service

**Product Name** PeopleSoft Enterprise HCM Payroll for North America

**Resolution** To avoid the 805 abend that user faces during CONFIRM process, we have introduced a new warning message(MSGID 000618), which would be generated in calculate phase and would warn user about the future rows in balance records (EARNING, DEDUCTION and TAX). PSPSTCAL.cbl and pspstcal.dms has been modified for the same.

Also, the message generated by PAY036.sqr (Pre-confirm audit) has been modified to make it more meaningful.

**Summary of Metadata for this Package**

| Metadata Type                          | Status                    |
|----------------------------------------|---------------------------|
| Tags Defined by Bug                    | <a href="#">Available</a> |
| Managed Objects Included in Update     | <a href="#">Available</a> |
| ADS Managed Objects Included in Update | Not Applicable            |
| Pre-requisite Bugs                     | <a href="#">Available</a> |
| Post-requisite Bugs                    | <a href="#">Available</a> |
| Customizations Impact                  | Not Applicable            |
| Existing Tests                         | No Data Available         |
| Components To Test                     | No Data Available         |

### Template

Click Template link on the Review Change Packages page to open the Change Package Template window listing the chapters, tasks, steps, and step scripts in the change package template.

This example illustrates the fields and controls on the Change Package Template page.

[Help](#)

**Database** H92CD640

**Description**

**Package Name** CANDIDATE

**Last Updated on** 03/18/2021 10:26:48AM

**Package Status** Package Created

**Change Package Template**

1-20 of 178

[View 100](#)

| Chapter                           | Task                                             | Step                                             | Step Script       |
|-----------------------------------|--------------------------------------------------|--------------------------------------------------|-------------------|
| Planning Your Application Changes | Running the Initial Filters                      | Running the Initial Filter Queries on the Target | Filter0001        |
| Planning Your Application Changes | Running the Initial Filters                      | Running the Initial Filter Queries on the Source | Filter0011        |
| Planning Your Application Changes | Understanding Your Maintenance                   | Reviewing the Change Package Template            |                   |
| Preparing for Application Changes | Exporting Non-Managed Metadata                   | Running DataMover - Access Group Export          | accgp_e           |
| Preparing for Application Changes | Exporting Non-Managed Metadata                   | Running DataMover - Message Catalog Export       | msg_e             |
| Preparing for Application Changes | Exporting Non-Managed Metadata                   | Running DataMover - Tree Export                  | tree_e            |
| Preparing for Application Changes | Exporting Non-Managed Metadata                   | Running DataMover - BIP Export                   | filem_e           |
| Preparing for Application Changes | Exporting Non-Managed Metadata                   | Running DataMover - SEC_EXPORT_SRC_IP.DMS        | SEC_EXPORT_SRC_IP |
| Preparing for Application Changes | Exporting ADS Managed Object Metadata            | Copying ADS-MO Project To File                   | CANDIDATEPTM      |
| Applying Application Changes      | Running Filter Queries Prior to Applying Changes | Running Filter Queries to Check for Select Files | Filter0010        |

## Deleting Change Packages

Navigation:

Select **My Update Manager Dashboard**, and then **Change Package Utilities**, and then **Delete Change Packages**

This example illustrates the fields and controls on the Delete Change Packages page. You can find definitions for the fields and controls later on this page.

### Delete Change Packages

User ID PS

#### Search Options

#### Select Change Packages

1-3 of 3

[View All](#)

|                          | Package Name | Database | Status          | Migrated | Type   | Image Number | Last Update Date/Time | Package Description | Details |
|--------------------------|--------------|----------|-----------------|----------|--------|--------------|-----------------------|---------------------|---------|
| <input type="checkbox"/> | EXAMPLE      | H92CD610 | Package Created | No       | Update | 32           | 01/27/20 7:10:30AM    | EXAMPLE             |         |
| <input type="checkbox"/> | ENHANCEMENTS | H92CD610 | Complete        | No       | Update | 32           | 01/30/20 11:47:44AM   | ENHANCEMENTS        |         |
| <input type="checkbox"/> | TL_ENH       | H92CD610 | Complete        | No       | Update | 32           | 01/27/20 11:17:50AM   | TL_ENH              |         |

Deselect All

Delete Selected Package Definitions

| Field or Control      | Description                                                                                                                                                                                                                          |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Package Name</b>   | Search by package name.                                                                                                                                                                                                              |
| <b>Database Name</b>  | Search by database name.                                                                                                                                                                                                             |
| <b>Package Status</b> | Search by package status. Package statuses are: <ul style="list-style-type: none"><li>• Complete</li><li>• Imported</li><li>• Incomplete</li><li>• Package Created</li></ul>                                                         |
| <b>Package Type</b>   | Search by package type. Package types are: <ul style="list-style-type: none"><li>• Application Upgrade</li><li>• Tools Delta Package</li><li>• Required for Upgrade</li><li>• Translations Delta Package</li><li>• Updates</li></ul> |

The Select Package Definitions to Delete grid will list all the change packages that meet the selection criteria. Select the change packages to delete and click the Delete Selected button.

## Merging Change Packages

The following restrictions apply to merging change packages.

- Change Packages must have same target database.
- Change Package definition must have a status of complete or incomplete,
- Change Package type is Update(PUM).
- Change Package is defined, but not created in Change Assistant.

To merge change packages:

1. From the Update Manager Dashboard select the target database.
2. Expand Update Manager Utilities and select Merge Change Packages.
3. On Step 2 of 6, Create is selected by default and is the only option available. Enter the package name and description.
4. Click Next.
5. On Step 3 of 6, select the packages to merge.
6. Click Next.

### Note

Step 4 of 6 is skipped.

7. On Step 5 of 6 review the bugs.
8. Click Next. You will receive a message that there are overlapping packages, click OK.
9. Step 6 of 6 indicates the change package was successfully created.

Navigation:

Select **PeopleTools**, and then **Lifecycle Tools**, and then **Update Manager Dashboard**, and then **Update Manager Utilities**, and then **Merge Change Packages**

This example illustrates the fields and controls on the Merge Change Packages Step 2 of 6 page. You can find definitions for the fields and controls later on this page.

Merge Change Packages

Step 2 of 6

Merge bugs from existing change packages into a new change package.

123456

PreviousNext

Enter Change Package Name

The change package name must be unique for the user-selected target database.

DatabaseH92CD911PeopleTools Release8.57.00

Description

Package Name

Action

CreateEdit

Package NameMERGE\_EXAMPLE

Package DescriptionMerge Example

| Field or Control | Description                                  |
|------------------|----------------------------------------------|
| Action           | Create is the only available option.         |
| Package Name     | Enter a name for your merged change package. |

Analyzing Applied PRP(s)

If you have existing defined or created Change Package definitions that have not been applied to your target database, conflicts may exist after applying PRPs to the PUM source that will impact the existing Change Package. The PRP may contain post requisite updates, which would result in a partial and undocumented apply. To prevent this scenario, conflicts will be detected when the PRP is applied to the PUM source and displayed on the Analyze Applied PRP(s) page. The Recalculate Selected Package Definitions button on the Analyze Applied PRP(s) page will run the application engine program PTIARECALCCP to recalculate the package and remove the conflicting bugs.

Navigation:

Select **My Update Manager Dashboard**, and then **Change Package Utilities**, and then **Analyze Applied PRP(s)**

This example illustrates the fields and controls on the Analyze Applied PRP(s) page. You can find definitions for the fields and controls later on this page.

Analyze Applied PRP(s)

Analyze Applied PRP(s)

Packages listed on this page were identified as having been impacted by the subsequent apply of a PRP to the Image.

Filter Options

☒ Show All

☐ Show Conflicts Only

Q

1-7 of 7

View All

|                                     | Package Name | Type                 | Conflict Resolved | Initial Bug Count | Resolved Bug Count | Updated on         |
|-------------------------------------|--------------|----------------------|-------------------|-------------------|--------------------|--------------------|
| <input type="checkbox"/>            | NM4          | Update               | Yes               | 38                | 38                 | 03/29/18 1:55:54AM |
| <input type="checkbox"/>            | NM5          | Update               | Yes               | 1255              | 1256               | 03/29/18 1:56:06AM |
| <input type="checkbox"/>            | NN           | Update               | Yes               | 1795              | 1795               | 03/27/18 3:07:07AM |
| <input type="checkbox"/>            | NN5          | Update               | Yes               | 1795              | 1796               | 03/27/18 3:06:19AM |
| <input checked="" type="checkbox"/> | SYS1         | Update               | No                | 1426              | Pending            | 03/27/18 2:43:49AM |
| <input type="checkbox"/>            | TTRRFFUU1RFU | Required For Upgrade | Yes               | 11                | 14                 | 03/27/18 3:05:28AM |
| <input checked="" type="checkbox"/> | TTRRFFUU2RFU | Required For Upgrade | No                | 14                | Pending            | 03/27/18 2:52:12AM |

Select All

Deselect All

Recalculate Selected Package Definitions

| Field or Control   | Description                                                                                                                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filter Options     | Set the filter to show all or conflicts only.                                                                                                                                                                                                 |
| Package Name       | Name of the unapplied Change Package definition.                                                                                                                                                                                              |
| Type               | Change Package type: <ul style="list-style-type: none"><li>Update</li><li>Required for Upgrade</li><li>Tools Delta</li></ul> <b>Note:</b> PRPs do not deliver changes to translations, therefore Translation packages (TDP) are not affected. |
| Conflict Resolved  | Indicates whether or not the conflict has been resolved.                                                                                                                                                                                      |
| Initial Bug Count  | Indicates the initial number of bugs in the change package.                                                                                                                                                                                   |
| Resolved Bug Count | Indicates the number of bugs after the conflict has been resolved. If Conflict Resolved is No, the resolved bug count will be Pending.                                                                                                        |
| Updated On         | Date the change package was last updated.                                                                                                                                                                                                     |
| Select All         | Click to select all packages.                                                                                                                                                                                                                 |
| Deselect All       | Click to deselect all packages.                                                                                                                                                                                                               |

---

| Field or Control                                | Description                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Recalculate Selected Package Definitions</b> | Click to recalculate the selected packages. This will launch the PTIARECALCCP application program in Process Scheduler. Depending on the size of the Change Package, the job may take a while to complete. This program will set the Conflict Resolved Status to Y (Yes) if successful or E (Error) if a failure occurs. |

---

# Managing Customization Repository

## Understanding Customization Repository

The customization repository provides a way to assist customers in managing customizations when selecting updates in the PUM Search. The customization repository includes:

- Customization repository in the PUM Source Image.
- Visualization of customization impact in the PUM Search.
- Ability to take action based on identified customization impacts, including PUM automatic merge for PeopleCode, SQL, and XSLT.
- Customization Repository persistence mechanism.

See [Migrating PUM Data](#)

## Creating Customization Repository

The customization repository resides on the PUM Source. In order to create the repository, you must first identify all of the customizations that you want to track in the target databases and then upload the customization projects to the PUM Source. The customization projects apply across all your target databases. There are 2 types of customization projects, Managed Objects projects and ADS Managed Objects projects.

### Managed Object Customization Project

To create a managed object project:

1. Create a project on the customer database that includes your customizations.

#### Note

You can create as many customization projects as required.

The following methods are available to create the customization projects:

- In Application Designer create a project by manually adding the managed objects you have identified as customizations.  
You can use the UPGCUST project from your last upgrade.
- Create the project using PJRCUST, using one of these options:
  - In Change Assistant use the step Create Customization Project to create the project.

See [Step Types](#)

- Create the project using the command line PJRCUST.

See Lifecycle Management Guide: Creating Customization Project Using the Command Line

**! Important**

Your target database must be on PeopleTools 8.55 or above to use PJRCUST.

- Create the customization project in Change Assistant using the Create New Database Project option in Upload Customer Data to Image.
2. (Optional) Copy the customization project to file.

**i Note**

PUM Automatic Merge only supports the project from database.

3. Use Change Assistant to upload the customer data to PUM Source.
4. Review the upload on the PUM Source.
5. Run the Customization Calculation on the PUM Source.

See [Run Customization Calculation](#)

### ADS Managed Objects Project

To create an ADS project:

1. Sign on to the browser for the database where your ADS managed objects reside.
2. Select **PeopleTools**, and then **Lifecycle Tools**, and then **Migrate Data**, and then **Data Migration Workbench**.
3. Create the ADS project and save it.

See Lifecycle Management Guide: Defining ADS Project

4. Optionally copy the project to file.

**i Note**

If the data set is encrypted, you will not be able to upload the file in Change Assistant.

5. Use Change Assistant to upload the customer data to PUM Source.
6. Review the upload on the PUM Source.
7. Run the Customization Calculation on the PUM Source.

See [Run Customization Calculation](#)

## Uploading Customer Data to Image

The PUM Source Options page contains a section to setup the customization repository.

This example illustrates the fields and controls on the PUM Source Options — Customization Repository. You can find definitions for the fields and controls later on this page.

**Change Assistant Wizard**

**PUM Source Options**

**Options**

- Welcome Page
- Select Action
- Options**
  - General
  - PUM Source**
  - EM Hub
  - Additional
- Tasks**
  - Select Task

**PUM Source Details**

☒ Define PUM Source

\*PUM Source Database: HR92PUM1 Create

\*PUM(PI\_HOME) Directory: C:\psft\pt\hcm\_pi\_home\ ...

\*PUM Source PIA URL: http://.../0/ps/signon.html

**PUM Source Additional Settings**

Installed Languages: ENG Install

**Customization Repository**

Object Merge: Enabled Show

Customization Repository: Disabled Manage

Default Merge Rules: Edit

**Test Repository**

Test Repository: Disabled Manage

**Metadata Management**

Migrate Customer Data: Manage

Back Next Finish Cancel

| Field or Control         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Object Merge             | Select Enabled to enable object merge.                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Customization Repository | The Customization Repository will display Disabled until you upload some customizations. Select Manage to upload customizations.                                                                                                                                                                                                                                                                                                                                         |
| Default Merge Rules      | The Edit button is available to set default merge rules after customizations have been uploaded.<br>GG: PSFTPT-48417, The Edit button is available to set the global default merge rules after customizations have been uploaded.<br>You also have an option to modify the merge rules of a specific session and re-run the merge analysis without editing the global default merge rules. See <a href="#">Viewing PUM Automated Merge Sessions</a> , Merge Action Menu. |

#### Navigation:

From the Change Assistant menu select Tools, Options, PUM Source Options. Select Manage button for the Customization Repository.

This example illustrates the fields and controls on the Upload Customer Data to Image page. You can find definitions for the fields and controls later on this page.

Manage Customization Repository

**PUM(User) Data Loader**

**PUM Source Database**

H92PUM01

**Project(s) to Load Into PUM Source**

Select Existing Project File(s) Select Existing Database Project(s) Create New Database Project

| <input checked="" type="checkbox"/> | Project Name | Type | Location | Upload Status | Project Type | Target Repository |
|-------------------------------------|--------------|------|----------|---------------|--------------|-------------------|
|                                     |              |      |          |               |              |                   |

Remove Selected Projects View Log

Load Exit

There are 3 options for uploading customization data:

- Select Existing Project File(s)

**Note**

This option is grayed out if object merge is enabled.

- Select Existing Database Project(s)
- Create New Database Project

After selecting the projects, click the Load button to upload the customizations to the PUM Source Customization Repository.

### Select Existing Project File(s)

This example illustrates the fields and controls on the Select Existing Project File(s) page. You can find definitions for the fields and controls later on this page.

**Select Existing Project File(s)**

Target Repository: Customization

Project Type: Managed Objects

Object Merge: Disabled

Folder: C:\My\_Projects

Search: Search...

| <input type="checkbox"/>            | Project Name | Description | User |
|-------------------------------------|--------------|-------------|------|
| <input checked="" type="checkbox"/> | MY_CUST1     |             | PS   |
| <input type="checkbox"/>            | MY_TESTS     |             | PS   |

Add Selected Cancel

**Field or Control****Description**

Target Repository

Customization is selected and read only.

Project Type

For Customizations, the project types are:

- Managed Objects
- ADS Managed Objects

**Note:** If the ADS Managed Object project is encrypted, it will not be available to upload from project file.

Object Merge

Disabled for Existing Project Files.

Folder

Select the folder where the project file is stored.

| Field or Control | Description                                                                                                     |
|------------------|-----------------------------------------------------------------------------------------------------------------|
| Search           | Enter value to search for and press the Enter key.<br>All projects matching the entered value will be returned. |
| Project Grid     | Select the projects that you want to upload from the project grid.                                              |
| Add Selected     | Click the Add Selected button to return to the Upload Customer Data to Image page.                              |

### Select Existing Database Project(s)

This example illustrates the fields and controls on the Select Existing Database Project(s) page. You can find definitions for the fields and controls later on this page.

**Select Existing Database Project(s)**

Target Repository: Customization

Project Type: Managed Objects

Object Merge: Disabled

Database: H92CD640

Search: democ

| <input type="checkbox"/>            | Project Name | Description | User |
|-------------------------------------|--------------|-------------|------|
| <input checked="" type="checkbox"/> | DEMOCUST     |             | PS   |
| <input type="checkbox"/>            | DEMOCST2     |             | PS   |

| Field or Control  | Description                                                                                                                               |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Target Repository | Customization is selected and read only.                                                                                                  |
| Project Type      | For Customizations, the project types are: <ul style="list-style-type: none"> <li>Managed Objects</li> <li>ADS Managed Objects</li> </ul> |
| Object Merge      | Indicates if object merge is enabled or disabled.                                                                                         |
| Database          | Select the target database that contains the project.                                                                                     |
| Search            | Enter value to search for and press the Enter key.<br>All projects matching the entered value will be returned.                           |

| Field or Control | Description                                                               |
|------------------|---------------------------------------------------------------------------|
| Project Grid     | Select the projects that you want to upload from the project grid.        |
| Add Selected     | Click the Add Select to return to the Upload Customer Data to Image page. |

This example illustrates the fields and controls on the Select Existing Database Project(s) for ADS Managed Objects.

**Select Existing Database Project(s)**

Target Repository: Customization

Project Type: ADS Managed Objects

Object Merge: Disabled

Database: H92CDTGT

Search: aca\_pg

| <input type="checkbox"/> | Project Name | Description                   | User |
|--------------------------|--------------|-------------------------------|------|
| <input type="checkbox"/> | ACA_PG       | ACA pivot grid configurations | PS   |

### Create New Database Project

This example illustrates the fields and controls on the Create New Database Project. You can find definitions for the fields and controls later on this page.

**Create New Database Project**

Database: H92TGT01

Project Name: DB\_PROJECT

Object Merge: Disabled

**Select Object Type**

☒ All Customized Managed Objects

| Field or Control               | Description                                                                                                                                                                                          |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Database                       | Select the database that contains the customizations.                                                                                                                                                |
| Project Name                   | Enter the Project Name.                                                                                                                                                                              |
| Object Merge                   | Indicates if object merge is enabled or disabled.                                                                                                                                                    |
| All Customized Managed Objects | This feature will go through the specified objects in a database and compare the object user id with 'PPLSOFT' and insert the object into the customization project if the user ID is not 'PPLSOFT'. |

## Using Customization Repository

The Customization Repository provides the following components to manage the customizations:

1. Manage Customizations
2. Manage Repository Objects
3. Run Customization Calculation

## Managing Customizations

The Customization Repository is used to identify the relationships to customized objects before the change package is created. The Customization Repository is delivered empty on the PUM Source and must be populated using Change Assistant to upload the customer data.

To access the Customization Repository page, select the Customization Repository tile from the Update Manager Homepage.

The Manage Customizations Search page is displayed.

This example illustrates the fields and controls on the Manage Customizations Search page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Manage Customizations' page in the 'Customization Repository' application. On the left is a navigation menu with three items: 'Manage Customizations' (highlighted), 'Manage Repository Objects', and 'Run Customization Calculation'. The main area contains a search form with the following fields: 'Customization Name' (containing 'BEN'), 'Description', and 'Owner'. There are 'Search' and 'Clear' buttons. Below the form is a table titled 'Select Customization' with columns 'Customization Name', 'Description', and 'Owner'. The table contains one row: 'BEN\_CUSTOMIZATIONS', 'BEN\_CUSTOMIZATIONS', and 'UNKNOWN'.

| Field or Control          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Customization Name</b> | <p>The Customization Name is the name used to group customizations.</p> <p>By default, this the name of the customization project that was uploaded to the PUM Source using Change Assistant. You can have 0–n customizations defined. Each defined customization must have a unique customization name.</p> <p>You can add additional Customization names using the Add Customization button to regroup the uploaded objects as needed.</p> |
| <b>Description</b>        | <p>You can add a description on the Manage Customization page to assist in searching for customized objects.</p>                                                                                                                                                                                                                                                                                                                             |
| <b>Owner</b>              | <p>You can add an owner on the Manage Customization to assist in searching for customized objects</p>                                                                                                                                                                                                                                                                                                                                        |

This example illustrates the fields and controls on the Manage Customizations page. You can find definitions for the fields and controls later on this page.

Customization Repository

Manage Customizations  
PRJ30154290  
[Return to Search](#)

Run Customization Calculation  
Save

Manage Repository Objects

Run Customization Calculation

Details

Description

PRJ30154290

Added to Repository

05/04/2022 1:47AM

Additional Details

Owner

UNKNOWN

Last Updated Oprid

PS

Preferences

Do you want to make this Customization Active

Yes ☐

Do you want to include these Customized objects in Package

Yes ☐

Attachments

You have not added Attachment

[Add Attachment](#)

Customized Objects

Manage Objects  
Manage Application DataSets

+

Q

| Object Type <sup>TL</sup>           | Object Value 1 <sup>TL</sup> | Object Value 2 <sup>TL</sup> | Object Value 3 <sup>TL</sup> | Object Value 4 <sup>TL</sup> | Customization <sup>TL</sup> | 3 Way Merge Enabled <sup>TL</sup> |                                                                             |
|-------------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|-----------------------------|-----------------------------------|-----------------------------------------------------------------------------|
| Panel Group PeopleCode              | TL_ENTER_TIME_FLU            | GBL                          | SavePostChange               |                              | No                          | Yes                               | <a href="#">Object Version History</a> <input type="button" value="—"/>     |
| Panel Group Record Field PeopleCode | TL_ENTER_TIME_FLU            | GBL                          | TL_ELP_TIME_WRK              | TL_SUBMIT_PB                 | FieldEdit                   | No                                | Yes <a href="#">Object Version History</a> <input type="button" value="—"/> |
| Panel Group Record Field PeopleCode | TL_PRE_POP_ELP_FL            | GBL                          | TL_ELAPSED_WRK               | SUBMIT_PB                    | FieldChange                 | No                                | Yes <a href="#">Object Version History</a> <input type="button" value="—"/> |

| Field or Control   | Description                                                                        |
|--------------------|------------------------------------------------------------------------------------|
| <b>Description</b> | <p>Use this field to provide a more detailed description of the customization.</p> |
| <b>Owner</b>       | <p>Specify the owner for the Customization.</p>                                    |

| Field or Control                                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Added to Repository</b>                                        | Read only field with the date the project was uploaded.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Last Updated Oprid</b>                                         | Read only field displaying the User ID that uploaded the customization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Additional Details</b>                                         | Add any additional details to describe the customization objects in this group.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Do you want to make this Customization Active</b>              | <p>Specify whether the customized objects in this Customization group are active.</p> <ul style="list-style-type: none"> <li>No           <p>The customized objects are excluded from the calculation analysis.</p> <p>When you define a change package that contains a bug fix which impacts the customized object, the Custom Impact column will display <i>Excluded</i>.</p> </li> <li>Yes (default)           <p>The customized objects are included in the calculation analysis.</p> <p>When you define a change package that contains a bug fix which impacts the specified customization, the Custom Impact column will display <i>Included</i>.</p> </li> </ul>                                                                                                                                                                                                                                        |
| <b>Do you want to Include these Customized objects in Package</b> | <p>Specify whether bug fixes which impact the customized object should be, by default, included or excluded from change package creation.</p> <ul style="list-style-type: none"> <li>No – exclude from package creation           <p>The customization objects are excluded from the calculation analysis.</p> <p>When you define a change package that contains a bug fix which impacts the customized object, the Custom Impact column will display <i>Excluded</i>. This is a visual indicator, however you must manually deselect the bug or it will be included in the package.</p> </li> <li>Yes (default) – include in package creation           <p>The customized objects are included in the calculation analysis.</p> <p>When you define a change package that contains a bug fix which impacts the specified customization, the Custom Impact column will display <i>Included</i>.</p> </li> </ul> |
| <b>Add Attachment</b>                                             | <p>Add documents pertaining to the customization from your local.</p> <p>You can upload documents of type TXT, Microsoft Excel, Microsoft Word, and PDF.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Customized Objects</b>                                         | The customized objects grid lists the object type, object values, if it is a customization, and if 3 way merge is enabled.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Adding Customizations

To manually add customizations:

1. Select Customization Repository from the Update Manager homepage.
2. Select Add Customization
3. Enter the Customization name and click Add.
4. Enter the details and preferences.
5. Initially, no objects will be associated with the Customization.
6. Select either Managed Objects or Manage Application DataSets.
7. Use the Add Object to Customization button to add the objects.
8. From the Add Managed Objects page or Add Application DataSets page, search for and select the objects to add.

### Note

All objects that have been uploaded to the Customization Repository are available to add.

9. Use the Add icon (+) to add additional objects to the customization.

### Note

Objects must be added one at a time.

10. Save the Customization.
11. Run the Customization Calculation.

This example illustrates the fields and controls on the Manage Customizations page for a new customization.

The screenshot displays the 'Manage Customizations' interface. The left sidebar contains navigation links: 'Manage Customizations' (active), 'Manage Repository Objects', and 'Run Customization Calculation'. The main content area is titled 'Manage Customizations' and shows details for a customization named 'BENEFITS\_CHGS'. At the top right of the main area are buttons for 'Run Customization Calculation' and 'Save'. Below the title, there is a 'Return to Search' link. The 'Details' section includes input fields for 'Description', 'Owner', 'Added to Repository' (showing '02/27/2021 12:28PM'), 'Last Updated Opriid' (showing 'PS'), and a text area for 'Additional Details'. The 'Preferences' section contains two toggle questions: 'Do you want to make this Customization Active' and 'Do you want to include these Customized objects in Package', both with 'Yes' buttons. The 'Customized Objects' section at the bottom has two tabs: 'Manage Objects' (active) and 'Manage Application DataSets'. Below the tabs, it states 'No Objects associated in this Customization' and provides an 'Add Object to Customization' button.

This example illustrates the fields and controls on the Example Add Managed Objects page. You can find definitions for the fields and controls later on this page.

Add Managed Objects

Object Type

Record

Object Name

DEP

Search

Clear

Select Object

| Object Type | Object Value 1 | Object Value 2 | Object Value 3 | Object Value 4 |
|-------------|----------------|----------------|----------------|----------------|
| Record      | DEP_BENEF_VW   |                |                |                |
| Record      | DEP_BEN_ADDR   |                |                |                |

## Deleting Customizations

To delete an object from the Customization:

1. Select Customization Repository from the Update Manager homepage.
2. Open the Customization Name.
3. Select the – (delete row) action in the customized object grid.
4. You will be prompted that the row will be deleted when the customization is saved.

If a customization is deleted, the customization calculation must be re-run to ensure that the correct metadata exists in the database.

## Manage Repository Objects

The Manage Customized Objects page contains a list of the customized objects. The same object may exist in more than one customization.

To access the Customization Repository page, select the Customization Repository tile from the Update Manager Homepage.

Select Manage Repository Objects.

This example illustrates the fields and controls on the Manage Repository Objects page. You can find definitions for the fields and controls later on this page.

Update Manager

Customization Repository

Manage Customizations

Manage Repository Objects

Run Customization Calculation

Manage Objects

Manage Application Datasets

Object Type

Application Package PeopleCode

Object Name

Search

Clear

Select Object

| Object Type                    | Object Value 1         | Object Value 2    | Object Value 3 | Object Value 4 |
|--------------------------------|------------------------|-------------------|----------------|----------------|
| Application Package PeopleCode | HRS_APPLICANT_TRACKING | HRS_OFFER         | UI             | OfferUI        |
| Application Package PeopleCode | HRS_APPLICANT_TRACKING | RecruitmentAction | UTIL           | FlexProcess    |

| Field or Control        | Description                                                                                                      |
|-------------------------|------------------------------------------------------------------------------------------------------------------|
| <b>Object Type</b>      | Use the Object Type editbox to display customizations by object type.                                            |
| <b>Object Name</b>      | Use the Object Name editbox to display customizations for a specific object names.                               |
| <b>Object Type</b>      | Specifies the managed object type.                                                                               |
| <b>Object Value 1–4</b> | These 4 columns are the same 4 key columns used to identify a managed object in PUM and managed object projects. |
| >                       | Click to open the Add/Delete Customization References page.                                                      |

This example illustrates the fields and controls on the Manage Application Datasets page. You can find definitions for the fields and controls later on this page.

| Field or Control        | Description                                                                                                  |
|-------------------------|--------------------------------------------------------------------------------------------------------------|
| <b>ADS Type</b>         | Select the ADS Type to display..                                                                             |
| <b>Object Name</b>      | Use the Object Name editbox to display customizations for specific object names.                             |
| <b>Data Set Name</b>    | Name of the Data Set.                                                                                        |
| <b>Object Value 1–8</b> | These are the key columns used to identify an ADS managed object in PUM and ADS managed object projects      |
| <b>Customizations</b>   | Displays the customization count. Click the count link to open the Add/Delete Customization References page. |

### Adding and Deleting Customization References

To add or delete customization references, click Data Set Name or the > icon. This will open the Manage Object Customization Reference page. The list of customizations to add to an object is limited to the list of customizations defined in the Customization Repository.

This example illustrates the fields and controls on the Manage Object Customization References page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Manage Object Customization References' page. The left sidebar contains links for 'Manage Customizations', 'Manage Repository Objects', and 'Run Customization Calculation'. The main content area displays a table of customization references. The table has two columns: 'Customization Name' and 'Customization Active'. There are two rows of data: one for 'BEN\_CHGS' and one for 'MY\_CUSTOMIZATIONS', both with an 'Active' status. The page also includes a 'Run Customization Calculation' button and a 'Save' button.

To add a reference:

1. Click the Add a row icon (+).
2. Select an existing Customization Name using the Lookup icon.

### Note

Customization Names are defined in the Customization Repository.

3. Click Save.

### Note

If a customization reference is added, the Customization Calculation must be rerun.

To delete a reference:

1. Click the Delete a row icon (-).
2. Click OK to delete the row.
3. Click Save.

### Note

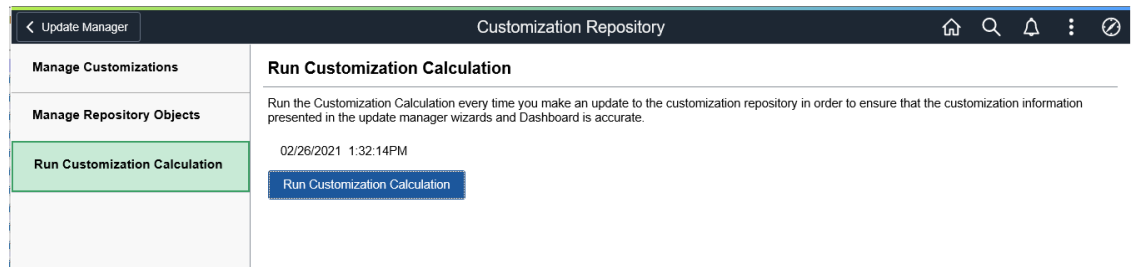
If a customization reference is deleted, the Customization Calculation must be rerun.

## Run Customization Calculation

In order to manage and display the customization impact in the PUM Search UI, a customization calculation must be generated for each bug fix in the Image. The Run Customization Calculation page is used to run the calculation for the customizations identified in the Customization Repository.

Both the Manage Customizations page and the Manage Object Customization References have a button to Run Customization Calculation. You can also access this page by selecting the Run Customization Calculation from the left hand menu on the Customization Repository.

This example illustrates the fields and controls on the Run Customization Calculation page.



Click the Run Customization Calculation button to update the bug calculations.

Bug fixes containing customizations will be flagged in the Custom Impact column when you define a change package. The status is dependant on which option you selected on the Manage Customizations page. *Included* indicates you want to include the definition in the change package and *Excluded* indicates you want to exclude it.

 **Note**

If no data exists in the Customization Repository, then there is no customization impact and the Run Customization Calculation button will be grayed.

# Using Administer Metadata

## Defining and Managing Databases Using Update Manager

This topic discusses how to define and manage databases using Update Manager.

### Defining Databases with Update Manager

Use the Define Database page to retrieve data from customer-maintained databases to PUM source database by invoking the provider API from the PUM source.

Customer-maintained database can be:

- The target database.
- An old PUM source containing the customization repository, which is on an older PUM Image.

See [Migrating PUM Data](#).

You can fetch data from customer-maintained databases without having to configure its PeopleSoft client information in Change Assistant.

#### Important

Integration objects created as part of provider REST service will be delivered for customer-maintained databases environments on PeopleTools releases prior to 8.60.

Only minimal information, such as, hostname and credentials, are fetched from the target database.

Prior to PeopleTools 8.60, target databases needed to be defined in Change Assistant. In PeopleTools 8.60 and higher, you can define the database in Update Manager.

For instructions on defining databases in Change Assistant, refer [Defining Databases](#)

Navigation

**Update Manager**, and then **Administer Metadata**, and then **Manage Database**, and then **Define DB**

This example illustrates the fields and controls on the Define Database page. You can find definitions for the fields and controls later on this page.

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                      |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Database Name        | Enter the database name.                                                                                                                                                                                                                                                                                                         |
| Description          | Use this field to provide a more detailed description of the new database.                                                                                                                                                                                                                                                       |
| Hostname             | Enter the hostname of the webserver for the target database.                                                                                                                                                                                                                                                                     |
| Port Number          | Enter the port number of the webserver for the target database.<br>This is the port used to create the REST Base URL.                                                                                                                                                                                                            |
| Node Name            | Enter the default local node name of the target database.<br>This is the node used to create the REST Base URL.                                                                                                                                                                                                                  |
| Fetch DB Information | Click this button to invoke REST API for the environment specified as the hostname.<br>If the connection is successful, the REST API returns basic database information, such as, PeopleTools version of the target database, languages installed, and base language.<br>This information is stored in the PUM source database.  |
| Orientation          | <b>Name:</b> Based on the information returned after the connection is successful, you can define a role or orientation for the PeopleSoft PUM source database.<br>For details, refer the succeeding section on database orientation.<br><b>Status-</b> Use this field to set the orientation <b>Active</b> or <b>Inactive</b> . |

Once you define the database, it appears on the Manage Database page.

### Database Orientation

You can assign a role or orientation for the defined database.

Based on the orientation, you can retrieve different metadata from the customer maintained database.

The database role or orientation options are:

| Orientation            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customization Instance | <p>Sets the defined database (remote database) to upload customization projects.</p> <p>Customization projects contain either custom or deliver-objects that are customized by the customers. Customizations are uploaded using a project which has these objects.</p>                                                                                                                                                                                                                                                                                                            |
| Source-Old             | <p>Sets the defined database (remote database) as old PUM source, which contains maintenance bug metadata that is required to analyze and create Change Packages.</p> <p>When the next PeopleSoft Image releases, customer can use this metadata and proceed with the PUM activities.</p> <p>Run the Retrieve Old PUM Metadata activity from the Defined Activity page on this database to retrieve customer metadata such as, package definitions of the old PUM source, customization repository data, test repository data, PUM automated updates from the old PUM source.</p> |
| Target                 | <p>Sets the defined database (remote database) as the target database and retrieves target information. Target database, which is on an older release, contains information, such as maintenance log.</p> <p>You can use the target database information, to create a change package for applying upgrade or update maintenance.</p>                                                                                                                                                                                                                                              |
| Usage Monitor          | <p>Sets the remote database as the Usage Monitor database.</p> <p>Customers can use the usage data to analyze and then add objects to the Change Package.</p> <p>For details, refer to <a href="#">Handling Usage Monitor Data</a></p>                                                                                                                                                                                                                                                                                                                                            |

Based on the orientation, different database activities appear for the remote database.

There can be multiple orientation for a remote database.

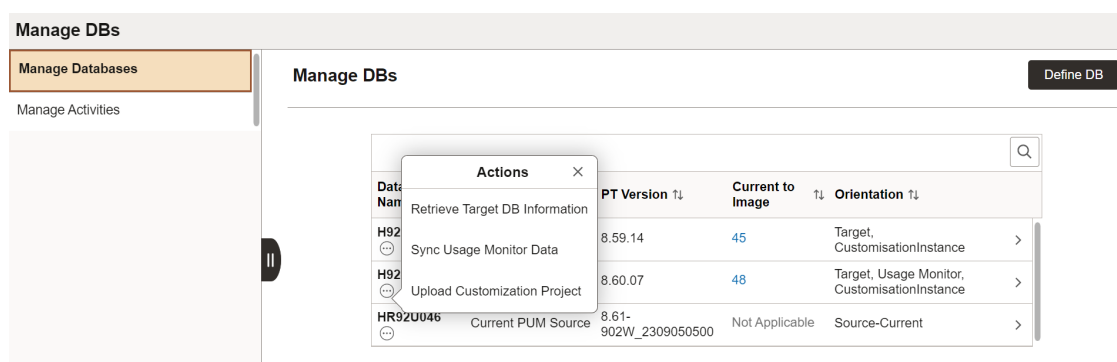
For details on the database activities, refer [Defining and Managing Database Activities](#).

## Managing Databases

The Manage DBs page lists databases that were defined and uploaded through Change Assistant or defined in the Define Database page in PAU.

Initially the page displays a single row with the current PUM source database, which has only the Source-Current orientation. The current PUM source details will be read-only.

This example illustrates the fields and controls on the Manage DBs page. You can find definitions for the fields and controls later on this page.



The Actions options on the database activities appear for each database based on the database orientations defined for this database. The database can have multiple orientations.

In this example, the database on the second row (H92TD906) has three database activities based on the orientations selected. The Upload Customization Project database activity appears only because one of the orientation is Customisation Instance. Suppose you select one of the activities, such as, Sync Usage Monitor Data, then the Define Activity page opens with the pre-defined parameters.

For more information on database activities, refer [Defining Database Activities](#).

#### Note

The Current to Image number appears when you run the Retrieve Target DB Information activity for the chosen database.

For further details, refer [Viewing Maintenance Levels of Target Environment](#)

## Viewing Maintenance Levels of Target Environment

From PeopleTools 8.61, you can know how current is your target database. The PUM source calculates the highest Image maintenance number where 90% or more of the delivered fixes up to that Image number are applied to the target database.

The calculation of the highest Image maintenance number is:

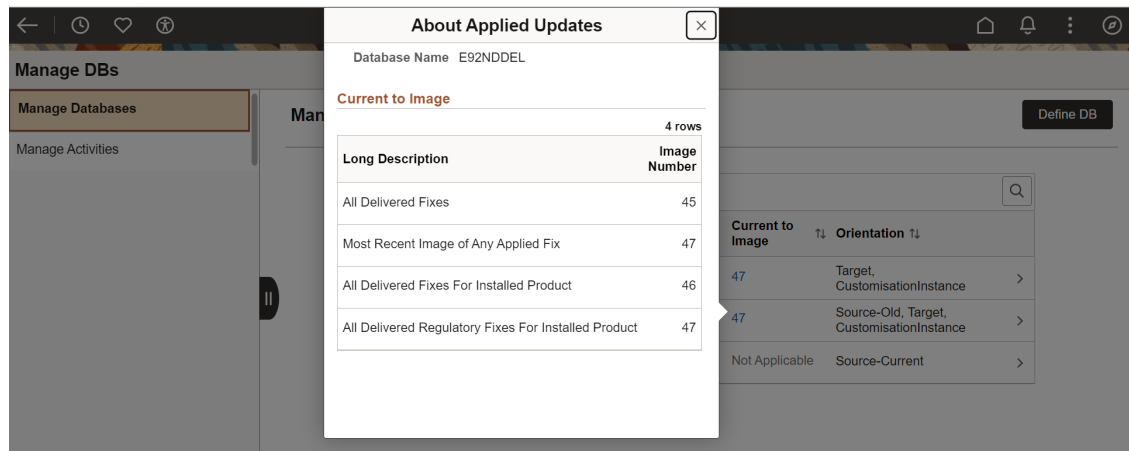
- relative to all delivered fixes applied.
- relative to all delivered fixes applied for installed products only.
- relative to all delivered regulatory fixes applied for installed products only (if applicable).
- based on the most recent Image of any applied fix.

There are two options to view this information.

First, On the Manage DBs page, click the Current to Image link to view the About Applied Updates page.

The About Applied Updates page provides a quick view of the details.

This example illustrates the fields and controls on the About Applied Updates page.



In this example,

- All Delivered Fixes- 90% or more of all the delivered maintenance that are applied are up to Image 45.
- Most Recent Image of Any Applied Fix- the highest Image number among all the fixes applied to the target database is Image 47.
- All Delivered Fixes For Installed Product- 90% or more of the delivered fixes applied for the Installed products in the Target database is up to Image 46.
- All Delivered Regulatory Fixes For Installed Product- 90% or more of the delivered regulatory fixes applied for the Installed products in the Target database is up to Image 47.

Second, on the Manage DBs page, click the database with orientation Target to view the Define Database page. The Define Database page opens to display the Current to Image section and other details as well.

The Current to Image section lets you know how current is your Target database.

This example illustrates the fields and controls on the Define Database- Current to Image section.

**Define Database**

**Details**

|               |                              |                  |                          |
|---------------|------------------------------|------------------|--------------------------|
| Database Name | E92907RD                     | Description      | DEP DB                   |
| Host Name     | dep04010_appdev_fusionappsdp | Port Number      | 8000                     |
| Node Name     | E92907RD                     | Use Https        | <input type="checkbox"/> |
| OPRID         | VP1                          | Password         | *****                    |
| Connect ID    | people                       | Connect Password | *****                    |
| Date Updated  | 10/17/2023 10:20PM           | PT Version       | 8.61-907R_2310100500.00  |

[Fetch DB Information](#)

**Orientation**

| Name   | Status |
|--------|--------|
| Target | Active |

**Current to Image**

| Long Description                                     | Image Number |
|------------------------------------------------------|--------------|
| All Delivered Fixes                                  | 45           |
| Most Recent Image of Any Applied Fix                 | 47           |
| All Delivered Fixes For Installed Product            | 46           |
| All Delivered Regulatory Fixes For Installed Product | 47           |

If the maintenance data is not uploaded from Target database to PUM source, then the Current to Image section displays the following message:

Upload Maintenance Log to view information. You can use Retrieve Target DB Information activity.

## Defining and Managing Database Activities

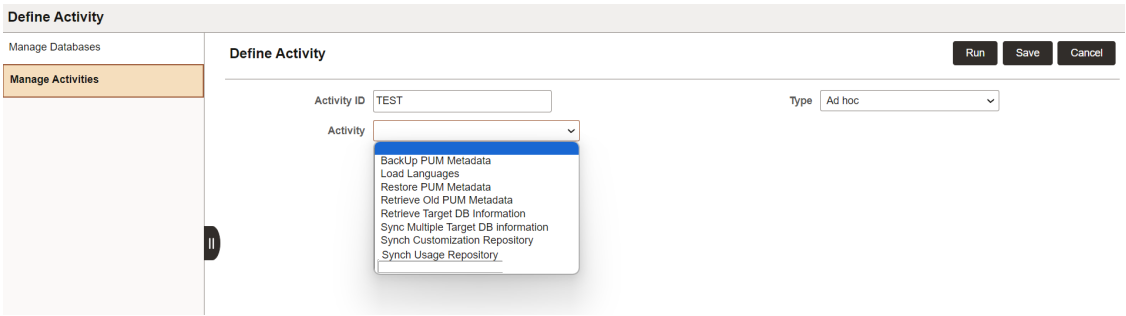
This topic discusses how to define and manage database activities.

### Defining Database Activities

You can run database activities on customer-maintained databases on a scheduled or ad hoc basis to fetch different metadata and perform various PUM activities.

The different activity options for a database are available based on the orientation assigned while defining the database.

This example illustrates the fields and controls on the Define Activity page. You can find definitions for the fields and controls later on this page.



Not all activities can be scheduled. Some of the activities run only on ad hoc basis.

After defining the activity, you can run or save it to run later from the Manage Activity page.

| Activity            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| BackUp PUM Metadata | <p>Run this activity to take a backup of the PUM user metadata from the current source to a file present in the App Server file directory. The file directory is created while provisioning the DPK.</p> <p>The App Server file directory is<br/>&lt;PS_CFG_HOME&gt;/&lt;appserver_domain_name&gt;/files</p> <p><b>Preferences:</b> Select any of these metadata to back up in form of a file from the existing PUM source:</p> <ul style="list-style-type: none"><li>• Cust Repository</li><li>• Merge Repository</li><li>• Test Repository</li><li>• Package Definition</li><li>• PUM Automated Updates</li></ul> <p>If PeopleTools version for the existing source is lower than 8.59, then Merge Repository and PUM Automated Updates options will be disabled.</p> <p>You can schedule or run this activity on ad hoc basis.</p> |
| Load Languages      | <p>Run this activity to load languages to the current PUM source.</p> <p>This activity runs only on ad hoc basis.</p> <p><b>Select language based on Target-</b> Select this option and then choose the database. Only databases defined as Target will be available for selection. Languages associated with this database will be displayed.</p> <p><b>Select language manually-</b> Select this option to manually select languages which are not already installed on existing PUM source. Language list differs from application pillar to pillar.</p> <p>For example, if HCM supports Spanish, it will appear in the language list if the source is a HCM database.</p>                                                                                                                                                         |

| Activity                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Restore PUM Metadata           | <p>To restore the PUM user metadata from the backup file created using the BackUp PUM Metadata activity.</p> <p>This activity runs only on ad hoc basis.</p> <p><b>Preferences:</b> Select the different metadata that need to be restored from the file:</p> <ul style="list-style-type: none"> <li>• Cust Repository</li> <li>• Merge Repository</li> <li>• Test Repository</li> <li>• Package Definition</li> <li>• PUM Automated Updates</li> </ul>                                                                                                                                                                                                                                                                                                  |
| Retrieve Old PUM Metadata      | <p>Run this activity to fetch PUM user metadata from a database that acts as the old PUM source.</p> <p><b>Database Options:</b> Only databases with orientation 'Source-Old' will be available for selection.</p> <p><b>Preferences:</b> Select the different metadata that need to be retrieved from the selected old PUM Source:</p> <ul style="list-style-type: none"> <li>• Cust Repository</li> <li>• Merge Repository</li> <li>• Test Repository</li> <li>• Package Definition</li> <li>• PUM Automated Updates</li> </ul> <p>If the PeopleTools version of the selected database is lower than 8.59, then Merge Repository and PUM Automated Updates options will be disabled.</p> <p>You can schedule or run this activity on ad-hoc basis.</p> |
| Retrieve Target DB Information | <p>Run this activity to fetch maintenance log, which lists the bugs and features that are already applied, and installed product information from the selected Target database.</p> <p><b>Database Options:</b> Only databases with orientation 'Target' will be available for selection.</p> <p>You can schedule or run this activity on ad-hoc basis.</p> <p>When you run this activity, the Current to Image section is enabled, which lets the PUM administrator know how current is your target database.</p> <p>For more information, refer, <a href="#">Managing Databases</a> and <a href="#">Viewing Maintenance Levels of Target Environment</a></p>                                                                                           |
| Synch Usage Repository         | <p>Run this activity to fetch information from the database that is defined as Usage Monitor database.</p> <p><b>Database Options:</b> Only databases with orientation 'Usage Monitor' will be available for selection.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Activity                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Synch Customization Repository      | <p>Run this activity to fetch information from the database that is defined as Customization Instance.</p> <p><b>Database Options:</b> Only databases with orientation 'Customization Instance' will be available for selection.</p> <p><b>Preferences:</b> This indicates if object merge is enabled or disabled in PUM Source Settings.</p> <p>If you have enabled object merge in PUM Source Settings (Update Settings tile), then all the mergeable objects will be fetched during the upload of the customization project and appropriate version numbers are assigned.</p> <p><b>Add project to load Customization to Source:</b> Add the customization projects. Click the Details link to view the details, such as, project definition.</p> |
| Sync Multiple Target DB Information | <p>Run this activity to upload maintenance logs of all the target databases defined in a single job.</p> <p>This activity creates a new PAU job for all the target databases and fetches maintenance log of each database (one by one). If a PAU job already exists for any target database, then that job name will be used.</p>                                                                                                                                                                                                                                                                                                                                                                                                                    |

The Load Languages, BackUp PUM Metadata, and Restore PUM Metadata are source-only activities as these affect only the PUM source database.

The remaining activities can be referred as integration activities as these triggers metadata exchange or synchronization between the source and customer maintained databases.

## Managing Database Activities

The Manage Activity page displays the status and details of the activities defined and scheduled or run on the Define Activity page.

This example illustrates the fields and controls on the Manage Activity page. You can find definitions for the fields and controls later on this page.

| Name                        | Activity                       | Last Run Datetime | Status  |
|-----------------------------|--------------------------------|-------------------|---------|
| MDACT_2022-06-22-07.08.43.0 | Sync Usage Monitor Data        | 06/22/2022 7:09AM | Success |
| MDACT_2022-06-22-06.51.16.0 | Sync Merge Repository Objects  | 06/22/2022 7:00AM | Success |
| MDACT_2022-06-22-06.40.20.0 | Retrieve Old PUM Metadata      | 06/22/2022 6:50AM | Success |
| MDACT_2022-06-22-06.37.16.0 | Retrieve Target DB Information | 06/22/2022 6:39AM | Success |

The activities that were saved and not run on the Define Activity page will not show any status on this page.

| Actions | Description                                                                                                                                               |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Update  | Select to edit the activity.                                                                                                                              |
| Delete  | Select to delete the activity. You can delete scheduled and ad hoc activities.                                                                            |
| Run     | Select to run the activity that was defined and saved.                                                                                                    |
| History | Select to view the run history and logs of the activity.<br>Alternatively, you can click on the row or the chevron (>) icon to view the history and logs. |

## Viewing Activity History

Select the History action from the Manage Activity page to view the activity history.

This example illustrates the fields and controls on the Activity History page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Activity History' page for a specific activity named 'TESTTTBKP'. The page has a sidebar with 'Manage Databases' and 'Manage Activities' (selected). The main content area displays a list of activity runs. The first run is dated '06/22/2022 4:34 AM', with activity 'BackUp PUM Metadata' and state 'Success'. The second run is dated '06/22/2022 4:23 AM', with activity 'BackUp PUM Metadata' and state 'Failed'. Both runs have a 'Download Logs' button. A third run is partially visible at the bottom, dated '06/22/2022 1:48 AM'.

Open the Activity History page of an activity to view the number of activity runs.

History is logged in order of the activity run with the date and status.

Click Download Logs to download the zipped log files. You can review these files and troubleshoot.

# Using Usage Repository

## Understanding Usage Repository

Usage Repository assists customers in fetching usage monitor data from different databases.

Customers can use this data to analyze and then add objects to the Change Package.

The usage repository can be used to:

- View usage monitor data.
- Run usage calculation.

Usage Monitor data fetched from different databases is stored in the PUM Usage Monitor table.

## Handling Usage Monitor Data

From PeopleTools 8.60, Usage Monitor data is fetched from different databases and stored in the PUM Usage Monitor table.

When users upload usage data to PUM source, relevant details are added to the PUM Usage Monitor table.

Usage flags are introduced in this table to indicate the usage of Usage Monitor.

| Flag Value | Use                                                                                                                   |
|------------|-----------------------------------------------------------------------------------------------------------------------|
| X          | Default value, and it indicates that the Usage Monitor is not in use.                                                 |
| Y          | This value is used when user uploads usage data in PUM source and Bug Calculation for Usage Monitor data is not done. |
| N          | This value is used when user uploads usage data in PUM source and Bug Calculation for Usage Monitor data is done.     |

### Uploading Usage Data Using Integration Broker

The Usage Monitor data fetched from different databases are uploaded to the PUM Usage Monitor table through the Integration Broker.

To upload the data through Integration Broker, first the PUM source invokes the Usage Instance through REST based APIs.

The APIs import the usage monitor information, which then gets populated into the PUM Usage Monitor table.

You can define a database that can act as a Usage Instance. To define, set the orientation as **Usage Monitor** in the Define Database page (Update Manager, Administer Metadata, Manage Database).

For details, refer to [Defining and Managing Databases Using Update Manager](#).

Next, users can define an activity of type **Synch Usage Repository** to fetch the information from this Usage Instance database. You can define this activity on the Define Activity page (Update Manager, Administer Metadata, Manage Activities).

For details, refer to [Defining and Managing Database Activities](#).

### Usage History Table

The usage history table maintains information of the database from which Usage Monitor data is imported.

When Usage Monitor data is fetched from any database for the first time, the usage history table populates the data against that database with last update time value as time of upload.

For the subsequent run, the system verifies if the data exists for that database in the usage history table. If the data exists, then it imports the Usage Monitor data collected after the last update time of the history table and this table will be updated with the latest last update time value. Basically, only the latest data is fetched in subsequent runs.

## Viewing Usage Monitor Data

The View Usage Data page displays usage data of each object.

Based on usage data of an object, you can decide to add an object in a Change Package.

This example illustrates the fields and controls on the View Usage Data page.

| Object Type | Object Value 1 | Object Value 2 | Object Value 3 | Object Value 4 |
|-------------|----------------|----------------|----------------|----------------|
| Record      | DERIVED_PSWD   |                |                |                |
| Record      | FUNCLIB_PTPP   |                |                |                |
| Record      | PSCAMA         |                |                |                |

This example illustrates the fields and controls on the View Usage Object References page.

| Object Type | Object Value 1 | Object Value 2 | Object Value 3 | Object Value 4 | Is Used |
|-------------|----------------|----------------|----------------|----------------|---------|
| Record      | DERIVED_PSWD   |                |                |                | Yes     |

The Is Used field on this page let's you know if the object is being used in a Change Package

# Running Usage Calculation

The Run Usage Calculation page lets you to verify all the objects delivered in bugs applied in the PUM source database against the objects uploaded in the Usage Repository and this result is stored in the PUM source table.

A flag is introduced in the PUM source table is used to identify the bugs having objects that are also uploaded in the Usage Repository.

If the value of the flag is **Yes**, then the bug has objects which are also uploaded in the Usage Repository.

If the value of the flag is **No**, then the bug does not have objects uploaded in the Usage Repository.

The flag value helps in setting usage values for a Change Package definition.

This example illustrates the fields and controls on the Run Usage Calculation page.

Run Usage Calculation

View Usage Data

Run Usage Calculation

Run Usage Calculation

Run the Usage Calculation every time you make an update to the usage repository in order to ensure that the usage information presented in the update manager wizards and Dashboard is accurate.

Run Usage Calculation

Click the Run Usage Calculation to update the usage calculation.

# Using PUM Automated Merge

## Understanding PUM Automated Merge

Beginning with PeopleTools 8.59.02, Change Assistant supports object merge for PeopleCode, SQL and XSLT objects in your Customization Repository.

When you enable object merge in Change Assistant and upload customizations to the PUM source, the data for the PeopleCode, XSLT or SQL objects will be included in the merge repository.

If Object Merge is enabled and a change package is created that contains merge enabled objects, the merge rules are used to automatically merge the code.

The merge session contains three sets of data:

- **Baseline Object-** This is the previous version of the delivered object in the PUM source database.
- **Customized Object-** This is the data uploaded by user to the customization and merge repository on the PUM source database.

See [Uploading Customer Data to Image](#).

- **Delivered Object-** This is the PeopleSoft delivered data in the PUM source database.

Object merge does a line by line comparison of PeopleCode, SQL or XSLT objects of customized object and delivered object with the baseline object to determine the change for each line. The change can include adding a new line, changing an existing line, or deleting an existing line. While generating a merged output if there is a conflict during the comparison of a line, then the merge process uses the merge rules to resolve the conflict and choose the user-preferred option.

You can find examples of Object merge in [Enabling PUM Automated Merge](#)

Note that in the initial Change Package create process, Change Assistant exports Object Merge project only with the metadata that is required for the Change Package create process. After running the object merge, the entire project is exported.

From PeopleTools 8.61, you can enable object merge in PAU as well.

## Enabling PUM Automated Merge

To enable Object Merge in Change Assistant:

1. In Change Assistant, select Tools, Options.
2. Select the PUM Source tab.
3. Select Enabled for Object Merge to enable object merge.
4. (Optional) Use the Show button for a list of mergeable objects.
5. Select Manage button for the Customization Repository to upload customization projects to the PUM Source. See [Uploading Customer Data to Image](#)

**Note**

Only *Select Existing Database Object* and *Create New Database Project* options are available on Manage Customization Repository page if Object Merge is enabled.

See [Uploading Customer Data to Image](#)

6. Select Edit button for the Default Merge Rules to review or change the default merge rules.  
See [Defining Default Merge Rules](#).

This example illustrates the fields and controls on the PUM Source Options. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Change Assistant Wizard' window with the 'PUM Source Options' tab selected. The left sidebar contains a tree view with 'Options' and 'Tasks' sections. Under 'Options', 'PUM Source' is selected. The main area displays several configuration sections:

- PUM Source Details:** Includes a checked 'Define PUM Source' checkbox, a dropdown for '\*PUM Source Database:' (set to 'HR92PUM1'), a text field for '\*PUM(PI\_HOME) Directory:' (set to 'C:\psft\pthcm\_pi\_home\'), and a text field for '\*PUM Source PIA URL:' (set to 'http://.../s/signon.html'). Buttons for 'Create' and '...' are present.
- PUM Source Additional Settings:** Includes a dropdown for 'Installed Languages:' (set to 'ENG') and an 'Install' button.
- Customization Repository:** Includes a dropdown for 'Object Merge:' (set to 'Enabled'), a text field for 'Customization Repository:' (set to 'Enabled'), and a 'Default Merge Rules:' section. Buttons for 'Show', 'Manage', and 'Edit' are present.
- Test Repository:** Includes a text field for 'Test Repository:' (set to 'Disabled') and a 'Manage' button.
- Metadata Management:** Includes a text field for 'Migrate Customer Data:' and a 'Manage' button.

At the bottom of the window are buttons for 'Back', 'Next', 'Finish', and 'Cancel'.

If you enable object merge, the following steps get enabled in Change Assistant. Run these in the order listed:

- Running the Merge Analysis Process
- Backing up Source Objects Prior to Merge Promotion
- Running the Merge Promotion Process
- Exporting Change Package MO Project from Source
- Restoring Source Objects after completing Merge

After these five steps are run, the object merge is complete. Now, the modified Change Package is available that includes your customization.

**Note**

If you do not enable the object merge, all the PeopleSoft-delivered changes will be applied to the Target database.

## Defining Default Merge Rules

The default merge rules provide the basis for the automatic merge.

Select the Edit button for default merge rules to review or modify the default merge rules. This merge rules are considered as global merge settings and can be used in all future merge sessions.

When the merge analysis runs, if a difference is detected for a line of code, this table is used to determine the action to be taken based on the status combination.

This example illustrates the fields and controls on the Default Merge Rules page. You can find definitions for the fields and controls later on this page.

Default Merge Rules

| Customized Object Line | Delivered Object Line | Customized Line                     | Customized Line as Note             | Delivered Line           | Delivered Line as Note              |
|------------------------|-----------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|
| Added                  | N/A                   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Added                  | Added                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Changed                | Common                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Changed                | Added                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Changed                | Changed               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Changed                | Deleted               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Deleted                | Common                | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Deleted                | Changed               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Deleted                | Deleted               | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Common                 | Common                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| N/A                    | Added                 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Common                 | Changed               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Common                 | Deleted               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Save as Default   Restore Defaults   Cancel

Modify the default rules as necessary for your environment.

Customized Line is the data uploaded by user to the customization and merge repository.

Delivered Line is PeopleSoft delivered data in the PUM source.

If Customized Line or Delivered Line is selected, then it is considered for merge whenever there is a merge conflict.

If the Customized Line as Note or Delivered Line as Note column is selected, the customized or delivered line will be displayed as a note and greyed out in the Merge Session. This helps to visualize and verify which line is getting merged or replaced by the merge rules. Basically, these lines are not added to the merged output.

Select the Restore Defaults button to restore the default rules that was already delivered.

Select the Save as Default button to keep the modified merge rule as default.

Review the merge rules in the following table. This table details the merge rules that are displayed in the preceding Default Merge Rules page example.

In this table, the Customized Object Line column shows the result of line by line comparison between the customized object line and the baseline object. The values such as Added, Changed, Deleted, and so on are displayed based on this comparison. Similarly, the Delivered Object Line column displays values based on the line by line comparison between the PeopleSoft delivered object and the baseline object.

| Rules                                                                                                                                                               | Customized Object Line                                                                                        | Delivered Object Line                                                                                                                      | Customized Line                                                       | Customized Line as Note | Delivered Line                                                                                                                                                        | Delivered Line as Note       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| Added-N/A                                                                                                                                                           | Added- This line was newly added by the user.                                                                 | N/A- No new delivered line is added in the delivered object when compared with the baseline object.                                        | The customized line is selected and will be considered for the merge. | Not selected.           | Not available for selection because no new delivered line is added.                                                                                                   | Not available for selection. |
| Added-Added<br><b>Note:</b> When the newly added customized line and the delivered line are different, then Added-N/A and N/A-Added merge rules will be applicable. | Added- This line was newly added by the user.                                                                 | Added- PeopleSoft also delivered the same line.                                                                                            | The customized line is selected and will be considered for the merge. | Not selected.           | Not available for selection. In this case customized line and delivered line are the same. To prevent duplication, the delivered line is not available for selection. | Not available for selection. |
| Changed-Common                                                                                                                                                      | Changed- This line in the customized object was changed by the user while comparing with the baseline object. | Common- This line in the delivered object is same as the line in the parent (baseline) object. Therefore, there is no change in this line. | The customized line is selected and will be considered for the merge. | Not selected.           | Not selected.<br><b>Note:</b> You can select both the customized line and delivered line in this merge rule.                                                          | Not selected.                |

| Rules           | Customized Object Line                                                                                                          | Delivered Object Line                                                                                          | Customized Line                                                       | Customized Line as Note | Delivered Line                                                                                               | Delivered Line as Note                                                                                                                                                                                                                                                                                               |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|-------------------------|--------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Changed-Added   | Changed-This line in the customized object was changed by the user while comparing with the baseline object.                    | Added-PeopleSoft delivered a new line.                                                                         | The customized line is selected and will be considered for the merge. | Not selected.           | Not selected.<br><b>Note:</b> You can select both the customized line and delivered line in this merge rule. | Selected.<br>The delivered new line will appear as a note.<br>This note let users know as per this merge rule the customized line will be selected in merge output, not the new line in the delivered object. Helps users to verify which is the conflicting line and which is the chosen line in the merge session. |
| Changed-Changed | Changed-This line in the customized object was changed by the user while comparing customized object with the baseline object.  | Changed-This line in the delivered object is changed by PeopleSoft while comparing with the baseline object.   | The customized line is selected and will be considered for the merge. | Not selected.           | Not selected.                                                                                                | Selected.<br>The changed line in the delivered object will appear as a note.                                                                                                                                                                                                                                         |
| Changed-Deleted | Changed-This line in the customized object was changed by the user while comparing customized object with the baseline object.. | Deleted-This line in the delivered object is deleted when comparing delivered object with the baseline object. | The customized line is selected and will be considered for the merge. | Not selected.           | Not selected.                                                                                                | Selected.<br>In this note, the deleted line from the delivered version is displayed.                                                                                                                                                                                                                                 |

| Rules           | Customized Object Line                                                                                                                     | Delivered Object Line                                                                                                                     | Customized Line                                                                                    | Customized Line as Note                                                           | Delivered Line                                                                                     | Delivered Line as Note                                   |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| Deleted-Common  | Deleted-This line in the customized object is deleted by the user while comparing customized object with the baseline object.              | Common-This line in the delivered object is same as the line in the parent (baseline) object. Therefore, there is no change in this line. | Not available for selection.                                                                       | Selected. In this note, the deleted line from the customized object is displayed. | Not selected.                                                                                      | Not selected.                                            |
| Deleted-Changed | Deleted-This line in the customized object is deleted by the user while comparing customized object with the baseline object.              | Changed-This line in the delivered object is changed by PeopleSoft.                                                                       | The deletion of this customized line was considered during the merge.                              | Not selected.                                                                     | Not selected.                                                                                      | Selected.<br>The delivered line will be shown as a note. |
| Deleted-Deleted | Deleted-This line in the customized object is deleted by the user while comparing customized object with the baseline object.              | Deleted-This line in the delivered object is deleted while comparing delivered object with the baseline object.                           | Not available for selection as the line is deleted in both customized object and delivered object. | Selected. In this note, the deleted line from the customized object is displayed. | Not available for selection as the line is deleted in both customized object and delivered object. | Not selected.                                            |
| Common-Common   | Common-This line in the customized object is same as the line in the parent (baseline) object. Therefore, there is no change in this line. | Common-This line in the delivered object is same as the line in the parent (baseline) object. Therefore, there is no change in this line. | The customized line is considered during the merge.                                                | Not selected.                                                                     | Not available for selection as the line is same.                                                   | Not selected.                                            |

| Rules          | Customized Object Line                                                                                                                     | Delivered Object Line                                                                                           | Customized Line                                                       | Customized Line as Note | Delivered Line | Delivered Line as Note                                                               |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|-------------------------|----------------|--------------------------------------------------------------------------------------|
| N/A-Added      | N/A-No new customized line is added in the customized object when compared with the baseline object.                                       | Added-PeopleSoft delivered a new line.                                                                          | Not available for selection because no new customized line is added.  | Not selected.           | Not selected.  | Selected.<br>The newly added line is displayed as a note.                            |
| Common-Changed | Common-This line in the customized object is same as the line in the parent (baseline) object. Therefore, there is no change in this line. | Changed-This line in the delivered object is changed by PeopleSoft.                                             | The customized line is selected and will be considered for the merge. | Not selected.           | Not selected.  | Selected.<br>The delivered line will be shown as a note.                             |
| Common-Deleted | Common-This line in the customized object is same as the line in the parent (baseline) object. Therefore, there is no change in this line. | Deleted-This line in the delivered object is deleted while comparing delivered object with the baseline object. | The customized line is selected and will be considered for the merge. | Not selected.           | Not selected.  | Selected.<br>In this note, the deleted line from the delivered version is displayed. |

From PeopleTools 8.61, you can choose to modify the merge rules of a specific session and re-run the merge analysis. In this way, you don't have to always edit the default merge rules through Tools, Options, PUM Source tab.

For details on modifying the merge rules of a specific session, see [Viewing PUM Automated Merge Sessions](#), Merge Action Menu.

### Versioning of Objects

Customization objects that are uploaded to merge repository are assigned a version number. Only those objects that have version numbers are considered during the merge analysis step.

After running merge analysis, when the promote merge step is run, the merged output is written back to the merge repository with a newly calculated version number.

The versioning format is nn.xx.yyy.

where,

nn- indicates the Image number.

xx- is reserved for future use.

yyy- indicates the upload iteration of the object. This increments when the same object is uploaded again.

Example on how versioning is calculated:

Consider a development (target) database which has updates applied from Application Update Image 12. An Object X (Peoplecode, XSLT, or SQL), has been customized by user in the development database.

Assume that the same object X was modified or delivered by multiple bugs (Bug 1, Bug 3, Bug 7, and Bug 8) in the following Images, which were applied to the development database:

- Bug 1 delivered in Image 05.
- Bug 3 delivered in Image 07.
- Bug 7 delivered in Image 11.
- Bug 8 delivered in Image 13.

If bugs Bug 1, Bug 3 and Bug 7 were applied on the development (target) database, then the version of Object X in the PUM Source will be 11.00.001, where:

11- indicates the version of the highest Image in which Object X was modified or delivered.

00- reserved for future use.

001- indicates the upload iteration. In this case, the Object X was uploaded for the first time.

If the same object is uploaded again, then the version of Object X is 11.00.002.

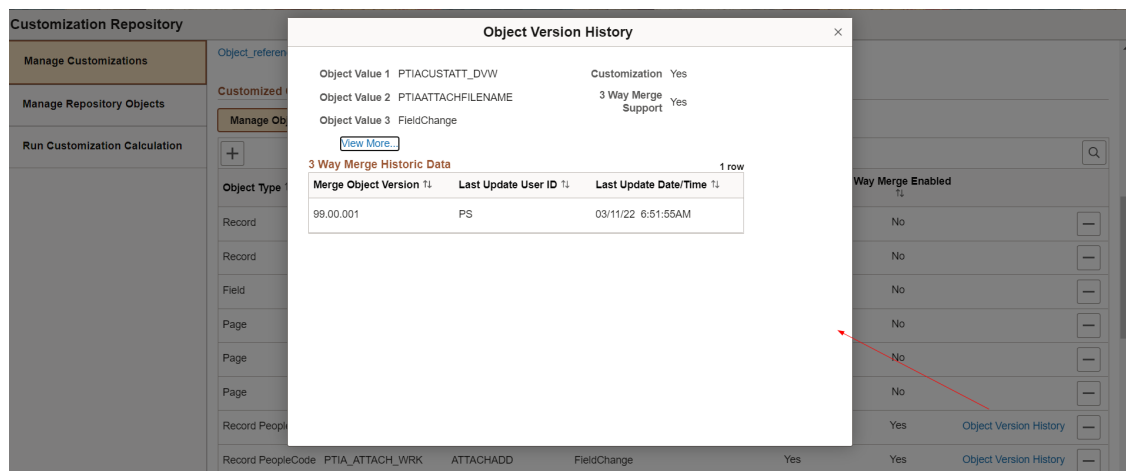
If all the bugs Bug 1, Bug 3, Bug 7, and Bug 8 are applied on the development database, then the version of Object X will be 13.00.001.

An Object Y, which is created by customer, and not delivered by PeopleSoft Images will not be considered for merge. This object is assigned the version 99.00.001 to identify as a customer created object. Object Y is not part of the merge process since there is no equivalent delivered object.

Assume that Bug 9 delivers Object X in Image 14. If the merge process is run using Image 14 with Object X, then the merged version of Object X is assigned 14.00.001 and written-back to the merge repository.

On the Customization Repository pages in PIA, you can view the version numbers of the customization objects.

This example illustrates the fields and controls on the Object Version History page.



## Retaining Object Merge Data and Session

Change Assistant writes back merged version of customized objects and merge session details in PUM source as part of the promote merge step.

For subsequent PeopleSoft application maintenance updates, Change Assistant can use the previously written-back merged objects as the latest customizations. This avoids re-upload of customizations.

### Note

If you have additional customizations after the last maintenance updates, you have to re-upload those to the PUM source.

Managing versions of customizations and details of merge sessions allows you to:

- Use previous merge session objects for the next merge session.
- Re-run merge sessions multiple times with same version of customization objects.
- Use the appropriate object version of customized objects in different merge use cases as explained below.
- Delete merge sessions, including promoted written-back versions, to roll back to use user uploaded version of customizations in the next run of merge process.

Few use cases on how to select the appropriate object versions of customized objects for merge analysis:

- When you run merge analysis for the first time, there is no record of merge sessions stored in the PUM source. In this case, Change Assistant uses the latest uploaded customization objects for merge analysis. When running merge promotion, the merged version of the object is written-back in the PUM source to be used in subsequent runs of merge process.
- You can run the merge analysis step again with modified merge rules until the merged version of the object is satisfactory. If you want to only change the merge rules to tweak the merge output, but use the same object versions that were used in the previous merge process run, then you can do so by re-running the merge analysis step with same merge session name.

Using the same merge session name, lets you to pick the same set of customization objects that were used in the previous run of that session.

- After running a merge session (SESSN1), an updated merged version of the customization (M1), is written-back to the merge repository tables. On next merge session run (SESSN2), M1 will be used. If you want to revert to using the previous user uploaded version (A) instead of M1, then the merge session that wrote-back the merged version of the object must be deleted, which is SESSN1.

User may also run the previously run merge session SESSN1 which will use same objects for merge which were used in last run.

If you want to upload a new version of the customization object again (A2) and use SESSN2, then all previous merge sessions, including SESSN1, must be deleted. This is a scenario if A2 version is lower than the written-back version of the object (M1) from any previous merge runs (SESSN1).

By deleting all the previous merge sessions (SESSN1), the merge output that was written-back gets deleted (M1). At this point, Change Assistant picks the latest customization that was re-uploaded (A2).

To delete, refer the succeeding section on deleting merge session.

#### Note

New version of customizations can be uploaded using either Change Assistant or Administer Metadata in Update Manager.

For details on syncing merge repository through Administer Metadata, refer to [Defining and Managing Database Activities](#)

- When the merge analysis step runs on a subsequent change package apply job, the latest version of customization objects are picked from the merge repository. The latest version could either be the written-back version of the customization objects from the previous merge session or the version of the object that was synced through the Administer Metadata; whichever is the highest version of that object.

### Delete Merge Session

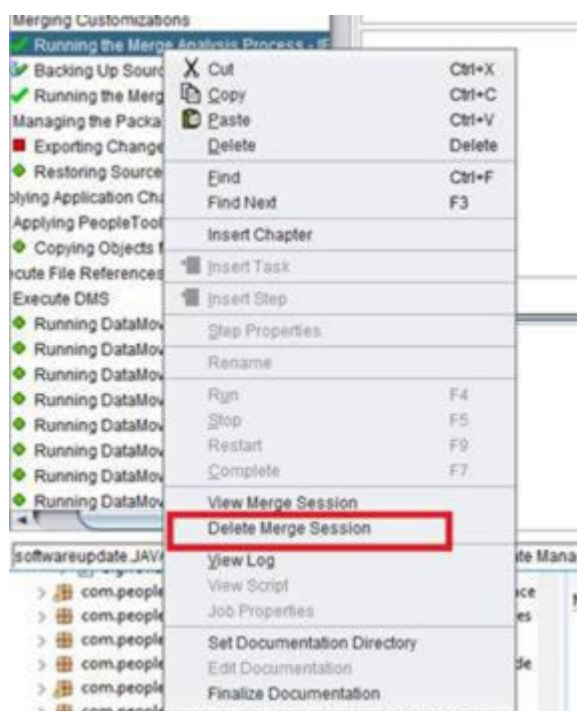
You can delete existing merge sessions in Change Assistant. This deletes the merge session data and the corresponding merged objects.

To delete existing merge session in Change Assistant:

1. Set the action type as View PUM Automated Merge Sessions.
2. Open the Tools menu.
3. Select Merge PeopleCode/SQLT/XSLT option.
4. Next, select Delete Merge Session.

In the Delete Merge Session window, you can select multiple merge sessions to delete using the Shift and down arrow key.

You can also delete a merge session while applying a change package.



You can also delete merge sessions from the command line.

For more details, refer to [Constructing Command Line to View and Delete Merge Sessions](#)

### Merge Session History

Change Assistant maintains the merge session details in the merge session history tables.

When customer runs the same merge session multiple times, then Change Assistant can lookup the merge session history tables to use the same set of customized objects that were used for merge analysis. This allows customer to run multiple sessions with changed merged rules.

When a merge session is re-run, Change Assistant deletes the previous merge session with the same merge name and inserts the latest one as the active merge session.

You can migrate (import or export) merge history tables.

In Change Assistant, select Tools, Options, PUM Source tab, then click Manage for Migrate Customer Data.

This example illustrates the fields and controls on the PUM Data Migration page.

## P PUM Data Migration



**PUM(User) Metadata from Existing PUM Source**

☒ Export PUM(User) Metadata from existing PUM Source

E92FSCMS ▼ Create

**Data Type**

☐ Customization Repository ☒ Merge Repository

☐ Test Repository ☐ PUM Automated Updates

☐ Package Definitions ☐ Usage Monitor Repository

Export To:  ...

☒ Import PUM(User) Metadata to New PUM Source

E92FSCMT ▼ Create

**Data Type**

☐ Customization Repository ☒ Merge Repository

☐ Test Repository ☐ PUM Automated Updates

☐ Package Definitions ☐ Usage Monitor Repository

☒ Overwrite if exists ☐ Ignore duplicate

**File Type**

☒ Same As Export ☐ Specify

Import From:  ...

Import / Export Cancel

Select the appropriate Merge Repository option to import or export merge history tables.

## Applying Change Package That Includes Merge-Enabled Objects

When merge-enabled objects are included in a change package, additional steps will be present in the Change Assistant job template to perform the automatic merge.

The new steps will perform the following update actions:

1. Running the Merge Analysis Process-IP

This step will run the merge analysis process in the initial pass for mergeable objects included in the current change package. The merged code is stored in staging tables.

## 2. Backing Up Source Objects Prior to Merge Promotion

This step will run Copy to File for existing (delivered) objects from PUM source prior to merge promotion. This file is used to restore the PUM Image to its original (pre-merge) state after the merging process is complete.

## 3. Running the Merge Promotion Process-IP

This step will run in the initial pass to promote the staging tables to the PUM Source tables.

## 4. Exporting Change Package MO Project from Source

This step creates a project with the merged code that is exported back into the change package.

## 5. Restoring Source Objects After Completing Merge

This step runs the Copy from File to restore the PUM delivered objects from the backup created in the step *Backing Up Source Objects Prior to Promotion*.

## 6. Running Compare of Vanilla Object Project

This step compares the PeopleSoft delivered version of the objects that were merged to the target database. These secondary compare reports can be used for additional reference when reviewing the primary compare results which compare the *Merged* versions of the mergeable objects to your target database.

## 7. Updating the Project Actions for Merged Objects

After the Managed Object compare is run, you can review the compare reports which will show how the code was merged.

### Note

If the merge steps fail, you can view the Merge Session to resolve any issues. See [Viewing PUM Automated Merge Sessions](#).

# Viewing PUM Automated Merge Sessions

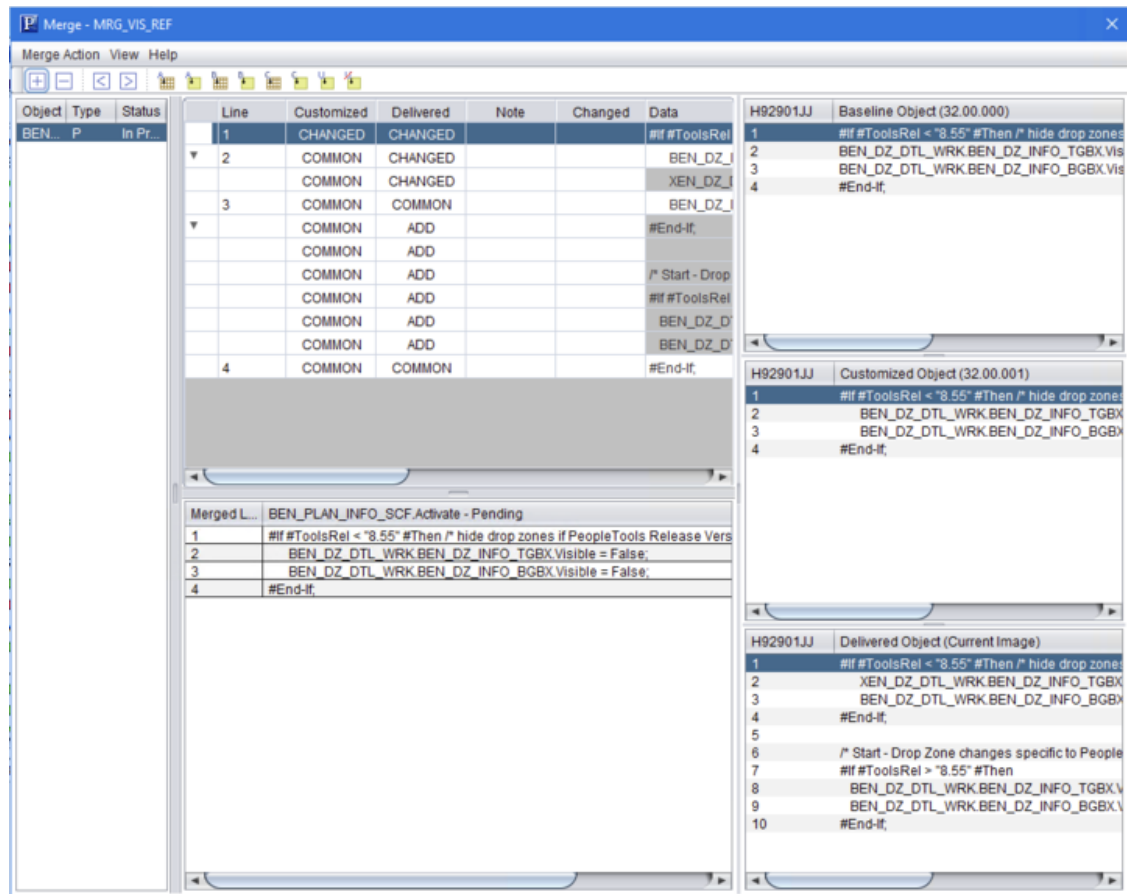
The PUM Automated Merge Session displays how the code is automatically merged based on the merge rules. This page can be used if the merge steps in the template fail or to review how the code was merged.

To access a merge session from a Change Assistant job, right-click on the step Running Object Merge and select View Merge Session.

To access a Merge Session in Change Assistant:

1. From the menu, select Change Action.
2. If the Welcome page is displayed, click Next.
3. Select View PUM Automated Merge Sessions and click Next.
4. Select Open Existing Merge Session and click Finish.
5. Select the PUM Source Database and click OK.
6. Select the Merge Session.

This example illustrates the different panes present on the Merge Session page. You can find definitions for the fields and controls later



When the merge analysis is run, the rules defined in the Default Merge Rules page will be applied. Refer [Enabling PUM Automated Merge](#).

For example, the first line in Merge Edit pane shows 'CHANGED' for both Customized Line and Delivered Line. On the Default Merge Rules page (check [Enabling PUM Automated Merge](#), Defining Default Merge Rules), the merge rule for CHANGED- CHANGED is defined to retain the Customized line and ignore the Delivered line. Therefore, in the result, only the Customized Line is displayed.

The Merge page contains these windows:

- Object list
- Merge edit pane
- Merge output pane
- Baseline Object
- Customized Object
- Delivered Object

The object versions of baseline object and customized object are displayed, which lets you to identify the object versions that participated in merge process.

The Merge Analysis log shows objects and its versions that participated in object merge process.

If the merge promotion step runs successfully, then the status shows 'Promoted.'

If the merge promotion step is not run, then the status shows 'In Progress.'

### Merge Action Menu

| Menu Option                     | Description                                                                                                                                                                                                                                                                                                 |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Save Session</b>             | Select to save session.                                                                                                                                                                                                                                                                                     |
| <b>Edit Merge Session Rules</b> | Select to edit the merge rules of the current merge session.<br>Lets you to modify the merge rules for the current merge session without modifying the default global merge rules, which is defined in Tools, Options, PUM Source tab.<br>For details, review <a href="#">Editing Merge Session Rules</a> . |
| <b>Delete Merge Session</b>     | Select to delete the current merge session.                                                                                                                                                                                                                                                                 |
| <b>Exit</b>                     | Select to exit.                                                                                                                                                                                                                                                                                             |

### Object List

| Header or Option | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Object</b>    | Mergeable object name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Type</b>      | Object type: <ul style="list-style-type: none"> <li>• P (PeopleCode)</li> <li>• S (SQL)</li> <li>• X (XSLT)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Status</b>    | Object Status: <ul style="list-style-type: none"> <li>• In Progress (Default status. Will be considered for promote merge)</li> <li>• Completed (Optional - User can mark this as complete after review. Objects with this status as well will be considered for promote merge)</li> <li>• No Action (User can select this if he/she does not want the respective object to be merged in promote merge step)</li> <li>• Applied (Only visible and selected when object is merged in promote merge step)</li> </ul> |

### Merge Edit Pane

Change Assistant displays the comparison in the merge edit pane. Lines from Customized and Delivered are listed in the merge pane and in the output pane according to the merge rules.

In the merge edit pane, the Customized and Delivered column shows the state of the line and the database to which it belongs. The lines are also color coded to show the state of each line. The color codes are, by default:

| Action  | Color |
|---------|-------|
| COMMON  | Black |
| ADDED   | Green |
| CHANGED | Blue  |
| DELETED | Red   |

| Action    | Color |
|-----------|-------|
| COMMENT   | Gray  |
| READ ONLY | Black |

Common lines are grouped in collapsed sections. Click the expand icon to expand each section.

Click in the text area of a line to edit the text.

To add lines to the merge edit pane from the individual data panes :

1. Highlight a line in the data pane.
2. Highlight a line in the merge edit pane.  
The new line will be inserted below the highlighted line.
3. Click an action icon to either insert the line or insert it as a note.

To add a blank line or delete a line, select the line and click the Add line icon or the Delete line icon on the Merge toolbar.

The Merge toolbar contains these options:

| Field or Control                                                                    | Description                     |
|-------------------------------------------------------------------------------------|---------------------------------|
|   | Add line.                       |
|  | Delete line.                    |
|  | Previous difference.            |
|  | Next difference.                |
|  | Insert Parent line.             |
|  | Insert Parent line as note.     |
|  | Insert Customized line.         |
|  | Insert Customized line as note. |
|  | Insert Delivered line.          |
|  | Insert Delivered line as note.  |

## Merge Output Pane

The output pane displays the current merge results. Initially, the output pane displays the results of the comparison based on the merge rules. When you apply changes, the new merge appears in the pane.

## Data Windows

When you select a program, Change Assistant displays the three versions of the program in the respective Baseline Object, Customized Object, and Delivered Object windows.

# Editing Merge Session Rules

You can modify the merge rules of the current or a specific merge session of the Running the Merge Analysis Process step without having to modify the default global merge rules defined in Tools, Options, PUM Source tab.

To modify the merge rule:

1. Right-click on the Running the Merge Analysis Process step.
2. Select View Merge Session.
3. On the Merge Action menu, select Edit Merge Rules.
4. Modify the merge rules by selecting or de-selecting the check boxes on the Edit Merge Session Rules window.
5. Click the Save for Session button.

To apply the modified merge session rules, re-run the Running the Merge Analysis Process step.

You can keep modifying the merge rules until you get a satisfactory result.

You can choose to set the modified merge rule that gave the satisfactory result as default for the future merge analysis runs by selecting Save as Default button.

This example illustrates the fields and controls on the Edit Merge Session Rules page. You can find definitions for the fields and controls later

Edit Merge Session Rules - MRGOBJECTMERGE\_TEST

×

| Customized Object Line | Delivered Object Line | Customized Line                     | Customized Line as Note             | Delivered Line           | Delivered Line as Note              |
|------------------------|-----------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|
| Added                  | N/A                   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Added                  | Added                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Changed                | Common                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Changed                | Added                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Changed                | Changed               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Changed                | Deleted               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Deleted                | Common                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Deleted                | Changed               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Deleted                | Deleted               | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Common                 | Common                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| N/A                    | Added                 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Common                 | Changed               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Common                 | Deleted               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Save as Default

Save for Session

Restore Defaults

Cancel

| Field or Control        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Save as Default</b>  | <p>Lets you to save the modified merge rule as default.</p> <p>This option is enabled when you modify the current merge rules.</p> <p>If this is disabled, then the rule that you see currently is the default merge rule.</p> <p>You can also directly modify the rules on the Edit Merge Session Rules window and save as default. Note that the modified rules will be used only in the future merge sessions.</p>                         |
| <b>Save for Session</b> | <p>This is enabled when you select or de-select the check boxes on the Edit Merge Session Rules window for modifying the current merge session rules.</p> <p>This option lets you to modify the merge rules of the current merge session without modifying the default global merge rules, which is defined in Tools, Options, PUM Source tab.</p> <p>You can modify the merge rules multiple times until there is a satisfactory result.</p> |
| <b>Restore Default</b>  | <p>Lets you to restore the PeopleTools-delivered merge rules.</p>                                                                                                                                                                                                                                                                                                                                                                             |

# Managing Test Repository

## Understanding Test Repository

The test repository provides awareness for mapping tests to bug fixes when selecting updates in the PUM search. The test repository includes:

- Test repository in the PUM Source.
- Visualization of test impact in the PUM Search.
- Ability to take action based on identified test impacts.
- Test Repository persistence mechanism.

See [Migrating PUM Data](#)

## Creating Test Repository

The test repository resides on the PUM Source. In order to create the repository, you must first identify the components or tests that you want to track in the target databases in a project and then upload the metadata to the PUM Source. The test projects apply across all your target databases.

Test information is uploaded to the PUM Source in Change Assistant. Depending on the type of test project uploaded the following occurs:

- PTF Tests

Change Assistant will read the test metadata and determine all of the components associated with the test. The test information metadata is uploaded to the test repository by test name. The test object reference will display the all the tests associated with the component.

- Components

For customer who do not use PTF, you can create projects that contains components. The test information (component names) is uploaded to the test repository using the project name. The test name will be the same as the project name.

### Note

It is not necessary to use PTF in order to use the test repository. Test impact is calculated based on components.

1. Create a project on the customer database that includes your components or tests.

**Note**

You can create as many test projects as required.

There are several methods available to create the test project:

- Create the test project in Application Designer by adding the tests or components to the project.
  - Create the project in Change Assistant using the Create New Database Project option in Upload Customer database to Image.
2. (Optional).Copy the test project to file.
  3. Use Change Assistant to upload the customer data to PUM Source.
  4. Review the upload on the PUM Source.
  5. Run the Test Coverage Calculation on the PUM Source.

## Uploading Tests to PUM Source

Navigation:

To upload tests to the PUM source:

1. In Change Assistant, select Tools, Options.
2. Select the PUM Source tab.
3. Select the Manage button for the Test Repository

This example illustrates the fields and controls on the Manage Test Repository page. You can find definitions for the fields and controls later on this page.

**Manage Test Repository**

**PUM(User) Data Loader**

**PUM Source Database**  
H92PUM01

**Project(s) to Load Into PUM Source**

Select Existing Project File(s) Select Existing Database Project(s) Create New Database Project

| <input checked="" type="checkbox"/> | Project Name | Type | Location | Upload Status | Project Type | Target Repository |
|-------------------------------------|--------------|------|----------|---------------|--------------|-------------------|
|-------------------------------------|--------------|------|----------|---------------|--------------|-------------------|

Remove Selected Projects View Log

Load Exit

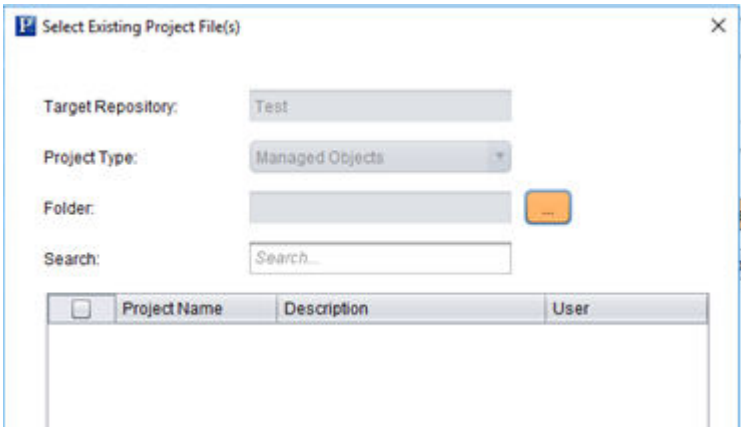
There are 3 options for uploading test data:

- Select Existing Project File(s)
- Select Existing Database Project(s)
- Create New Database Project

After selecting the projects, click the Load button to upload the tests to the PUM source Test Repository.

### Select Existing Project File(s)

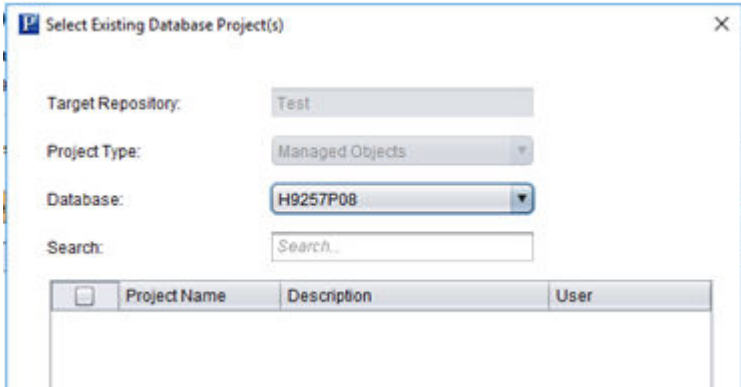
This example illustrates the fields and controls on the Select Existing Project File(s) page. You can find definitions for the fields and controls later on this page.



| Field or Control  | Description                                                                                                     |
|-------------------|-----------------------------------------------------------------------------------------------------------------|
| Target Repository | Test is selected and read only.                                                                                 |
| Project Type      | Tests are always managed object, the field will be grayed.                                                      |
| Folder            | Select the folder where the project file is stored.                                                             |
| Search            | Enter value to search for and press the Enter key.<br>All projects matching the entered value will be returned. |
| Project Grid      | Select the projects that you want to upload from the project grid.                                              |
| Add Selected      | Click the Add Select to return to the Upload Customer Data to Image page.                                       |

Select Existing Database Project(s)

This example illustrates the fields and controls on the Select Existing Database Project(s) page. You can find definitions for the fields and controls later on this page.



| Field or Control  | Description                     |
|-------------------|---------------------------------|
| Target Repository | Test is selected and read only. |

| Field or Control | Description                                                                                                     |
|------------------|-----------------------------------------------------------------------------------------------------------------|
| Project Type     | Tests are always managed object, the field will be grayed.                                                      |
| Database         | Select the target database where the project file is stored.                                                    |
| Search           | Enter value to search for and press the Enter key.<br>All projects matching the entered value will be returned. |
| Project Grid     | Select the projects that you want to upload from the project grid.                                              |
| Add Selected     | Click the Add Select to return to the Upload Customer Data to Image page.                                       |

### Create New Database Project

This example illustrates the fields and controls on the Create New Database Project page for the Test Repository. You can find definitions for the fields and controls later on this page.

| Field or Control                    | Description                                             |
|-------------------------------------|---------------------------------------------------------|
| Database                            | Select the database that contains the PTF tests.        |
| Project Name                        | Enter the Project Name.                                 |
| All PeopleSoft Test Framework Tests | This feature will insert all PTF tests in the database. |

## Using the Test Repository

Once test projects have been uploaded to the PUM Source, the Update Manager Dashboard provides the following components to manage the test repository:

1. Manage Tests
2. Manage Test Objects
3. Run Test Coverage Calculation

## Manage Tests

The Test Repository is used to identify the relationship between tests and components before the change package is created. For PTF customers, this would be the same as the Test Coverage Report, however it is available when selecting updates in the PUM Search. The Test Repository is delivered empty on the PUM Source and must be populated using Change Assistant to upload the customer data.

To access the Manage Tests page, select **PeopleTools**, and then **Lifecycle Tools**, and then **Update Manager Dashboard**, and then **Test Repository**, and then **Manage Tests**.

This example illustrates the fields and controls on the Manage Tests page. You can find definitions for the fields and controls later on this page.

Manage Tests

Test Repository

| Test Name                      | Description                    | Include in Package           |   |   |
|--------------------------------|--------------------------------|------------------------------|---|---|
| A_10270_LOCATION_CHANGE_01     | A_10270_LOCATION_CHANGE_01 x   | Yes <input type="checkbox"/> | + | - |
| A_10310_21884318ACTIVITY_01    | A_10310_21884318ACTIVITY_01    | Yes <input type="checkbox"/> | + | - |
| A_10350_HOME_NAV_BENEFITS_01   | A_10350_HOME_NAV_BENEFITS_01   | Yes <input type="checkbox"/> | + | - |
| A_10400_CANDIDAT_GATEWAY_00    | A_10400_CANDIDAT_GATEWAY_00    | Yes <input type="checkbox"/> | + | - |
| BUG17507975ASSIGNSCHED         | BUG17507975ASSIGNSCHED         | Yes <input type="checkbox"/> | + | - |
| BUG17978847_GRP_LST_SORTSEQ    | BUG17978847_GRP_LST_SORTSEQ    | Yes <input type="checkbox"/> | + | - |
| BUG18613273_OFFCYCL_ADV_DET    | BUG18613273_OFFCYCL_ADV_DET    | Yes <input type="checkbox"/> | + | - |
| BUG_14168143_GP_GL_PREP_ISSUE  | BUG_14168143_GP_GL_PREP_ISSUE  | Yes <input type="checkbox"/> | + | - |
| BUG_16507511_VIEW_ELM_USED_BY  | BUG_16507511_VIEW_ELM_USED_BY  | Yes <input type="checkbox"/> | + | - |
| BUG_17548097_ADD_BANK_PAY_DIST | BUG_17548097_ADD_BANK_PAY_DIST | Yes <input type="checkbox"/> | + | - |

**Include Bugs that Reference Components Without Associated Tests in Package**

☒ Yes
 ☐ No

### Field or Control

### Description

#### Test Name

For PTF tests, this is the name of the test. For component projects, this is the name of the project.

You can have 0–n test defined. Each defined test must have a unique test name.

#### Description

Use this field to provide a more detailed description of the test.

| Field or Control                                                                  | Description                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Include in Package</b>                                                         | Specify whether bug fixes which impact the specified test should be, by default, included or excluded from change package creation. <ul style="list-style-type: none"> <li>No – exclude from package creation</li> <li>Yes (default) – include in package creation</li> </ul> <b>Note:</b> This value can be overridden in the PUM Search. |
| <b>Include Bugs that Reference Components Without Associated Tests in Package</b> | Select <i>Yes</i> to include the bugs in the change package even if the component does not have an associated test.<br><br>Select <i>No</i> if you want 100% test coverage for the package.                                                                                                                                                |

### Adding Tests

To manually add tests, use the + action in the grid. When this method is used, a new row is added, however no objects will be associated with the new row. Use the Define Test Object Reference page to add the objects. See [Managing Test Objects](#).

Rows can also be added by uploading customer data through Change Assistant. See [Creating Test Repository](#).

### Deleting Tests

To delete a tests, use the – (delete row) action in the grid.

If a test is deleted, the test coverage calculation must be re-run to ensure that the correct metadata exists in the database.

## Managing Test Objects

The Manage Test Objects page contains a list of the test objects. The same object may exist in more than one test.

Navigation:

To access the Manage Tests Objects page, select **PeopleTools**, and then **Lifecycle Tools**, and then **Update Manager Dashboard**, and then **Test Repository**, and then **Manage Test Objects**.

This example illustrates the fields and controls on the Manage Test Objects page. You can find definitions for the fields and controls later on this page.

Manage Test Objects

Filter By Name

Test Coverage References

Q

1-5 of 80

View All

|                          | Object Type | Object Value 1  | Object Value 2 | Object Value 3 | Object Value 4 | Tests              |
|--------------------------|-------------|-----------------|----------------|----------------|----------------|--------------------|
| <input type="checkbox"/> | Component   | AGC_INFO_FL     | GBL            |                |                | <a href="#">1</a>  |
| <input type="checkbox"/> | Component   | EG_EE_FLEX_HIST | GBL            |                |                | <a href="#">1</a>  |
| <input type="checkbox"/> | Component   | EOAWMA_MAIN_FL  | GBL            |                |                | <a href="#">17</a> |
| <input type="checkbox"/> | Component   | EP_APPR_SELECT  | GBL            |                |                | <a href="#">2</a>  |
| <input type="checkbox"/> | Component   | GDP_SELECT_PRC  | ?PA            |                |                | <a href="#">1</a>  |

Select All

Clear All

Delete Selected

Save

Cancel

| Field or Control | Description                                                                                                                                           |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filter By Name   | Use the Filter By editbox to select a test name and display all the components associated with that test.                                             |
| Object Type      | The object type is Component.                                                                                                                         |
| Object Value 1–4 | These 4 columns are the same 4 key columns used to identify a managed object in PUM and managed object projects.                                      |
| Tests            | Displays the test count. Click the count link to open the Add/Delete Test Coverage page, which displays the test names associated with the component. |

To delete a component, select the component on the grid and click Delete Selected.

Adding and Deleting Tests

To add or delete test coverage, click the count link. This will open the Add/Delete Test Coverage page.

This example illustrates the fields and controls on the Add/Delete Test Coverage References page. You can find definitions for the fields and controls later on this page.

x
Add/Delete Test Coverage References

[Help](#)

Object Type    Component

Object Value 1    EOAWMA\_MAIN\_FL

Object Value 2    GBL

Object Value 3

Object Value 4

**Test Coverage References**

1-5 of 17

v

▶

▶▶

|

View All

| *Test Name                                                                             |   |   |
|----------------------------------------------------------------------------------------|---|---|
| CLASSIC_FLUID_SIGNOUT_LIB <span style="float: right;">x <input type="text"/></span>    | + | - |
| H_10420_APPROVING_JOB_OFFER_03 <span style="float: right;"><input type="text"/></span> | + | - |
| LOCATION_CHANGE_TR_10450_03 <span style="float: right;"><input type="text"/></span>    | + | - |
| NUI_10440_ADDING_HOMEPGE_01 <span style="float: right;"><input type="text"/></span>    | + | - |
| NUI_10440_ADDING_HOMEPGE_02 <span style="float: right;"><input type="text"/></span>    | + | - |

Use the + (add row) icon to add a test. The list of tests to add to a component is limited to the list of tests defined in the Test Repository.

Use the – (delete row) icon to delete a test from the component.

## Running Test Coverage Report

In order to manage and display the test impact in the PUM Search UI, a test coverage calculation must be generated for each bug fix in the Image. The Test Coverage Calculation page is used to run the calculation for the components identified in the Test Repository.

Navigation:

To access the Run Test Coverage page, select **PeopleTools**, and then **Lifecycle Tools**, and then **Update Manager Dashboard**, and then **Test Repository**, and then **Run Test Coverage Calculation**

This example illustrates the fields and controls on the Test Coverage Calculation page.

Change Assistant and Update Manager  
G47469-01  
Copyright © 1988, 2026, Oracle and/or its affiliates.

July 20, 2026  
Page 9 of 10

**Run Test Coverage Calculation**

---

### Test Coverage Calculation

Include(By default) fixes with test calculation score less than 1

Run Test Coverage Calculation

# Setting Up Lifecycle Management Insights

## Understanding Lifecycle Management Insights

Lifecycle Management (LCM) Insights enables you to visually review the customization level within each environment. This helps you to identify, manage, and optimize your customizations.

LCM Insights combines usage data, PUM metadata along with Managed Object (MO) customization metadata to provide information such as the percentage of customizations in the environment, usage of the customized objects and which customized objects are regularly impacted by application maintenance.

## Setting Up LCM Insights

This topic discusses:

- Step1: Creating and consolidating metadata for setting up LCM Insights
- Step2: Preprocessing metadata for setting up LCM Insights

### Step1: Creating and Consolidating Metadata for Setting Up LCM Insights

To set up the LCM Insights, first use Change Assistant to create and consolidate metadata and load the resulting metadata in a database defined as Insights database.

To create and consolidate metadata:

1. In Change Assistant, select **Tools, Populate Customization Insights**.

This example shows the fields to define the settings for populating the Insights.

Customization Insights Wizard

Customization Insights

Settings

Populate Customization Insights

Insights Settings

PUM Source

PUM Source Database: E92PUMS1

Customizations

Customization Source Database: E92CSTS2 Create

Project Name : PRJ001

Insights

Insights Database: E92INST1 Create

Back

Next

Finish

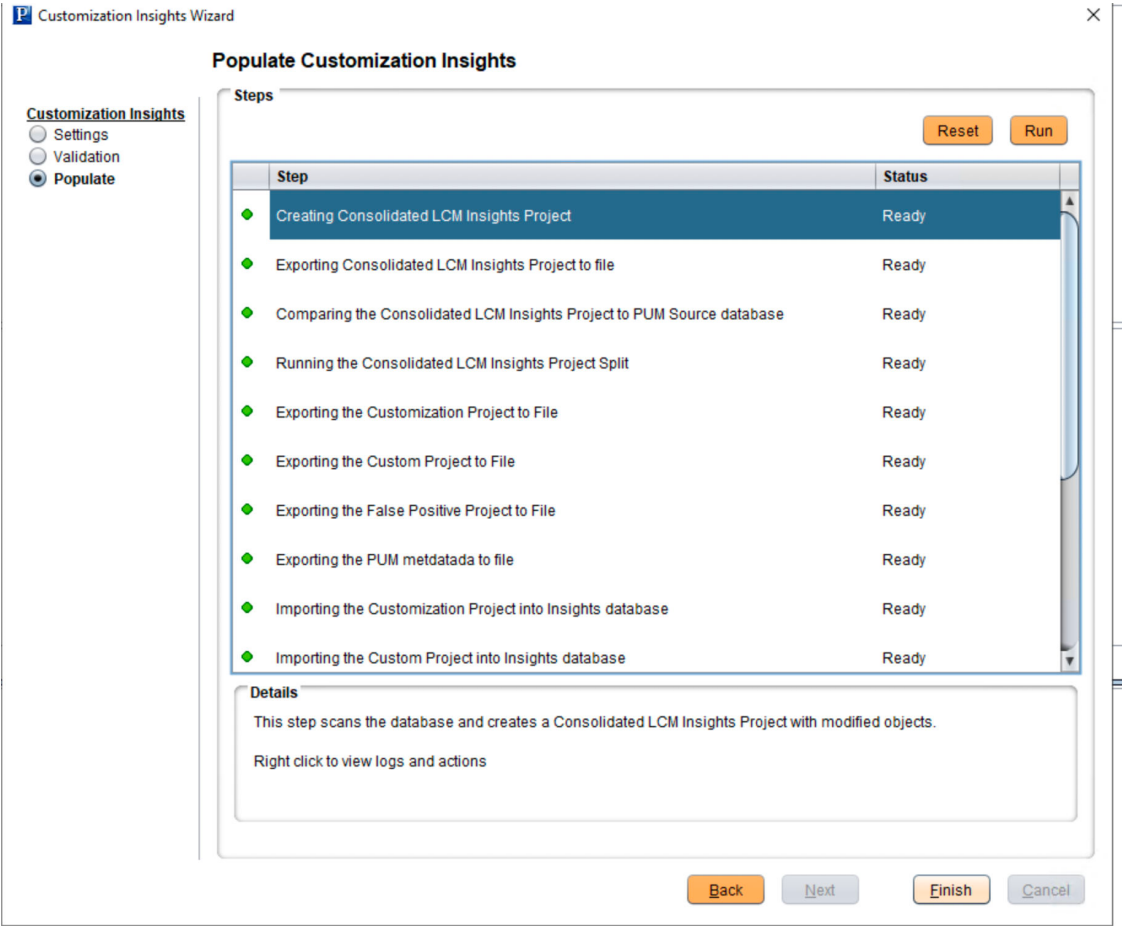
Cancel

| Field                         | Description                                                                                                                                                                                       |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PUM Source Database           | This is auto-populated. Ensure to define PUM Source through Tools,Options, PUM Source tab so that the PUM Source database name is auto-populated on this page.                                    |
| Customization Source Database | Select the Customization source database where the customizations reside.                                                                                                                         |
| Project Name                  | Enter a project name.<br>This project will be used to collect and compare customizations identified in the Customization source database.                                                         |
| Insights Database             | Select the Insights database where you intend to view and manage the LCM Insights.<br><b>Note:</b> As a best practice, it is recommended to use the Production database as the Insights database. |

2. Click Next. The Validation page opens where validations are done. Validations include primary checks such as verifying connection to PUM Source, verifying connection to Insights database and so on.

3. Click Next. The page will now run a sequence of steps to create and consolidate the customization and PUM metadata needed for the LCM Insights.

This example shows the steps to create and consolidate various metadata needed for the LCM Insights.



| Step                                                | Description                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Creating Consolidated LCM Insights Project          | This step analyzes the Customization source database, and creates a consolidated LCM Insights project with customized objects. The project name is entered on the Settings-Populate Customization Insights page. The consolidation of the customized objects is needed in order to complete the subsequent compare step in the process. |
| Exporting Consolidated LCM Insights Project to File | This step copies the consolidated LCM Insights project to a file.                                                                                                                                                                                                                                                                       |

| Step                                                                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Comparing the Consolidated LCM Insights Project to PUM Source database | <p>This step runs the Compare From File process. The compare is between the Consolidated LCM Insights project file, which contains the customized objects, and the PUM source database. It results in the project definition and compare result being stored in the PUM source database.</p> <p>The compare process is used to determine the true nature of the objects identified as customized in the user environment by comparing their status with PeopleSoft-delivered Managed Objects (MO).</p> <p>The result of this process is then used to categorize or split the customizations in the subsequent steps.</p>                                                                                                                                                                                                  |
| Running the Customization Project Split                                | <p>This step splits the Consolidated LCM Insights project into three projects based on the different object statuses as identified in the previous compare step.</p> <p>Definition of each customization project:</p> <ul style="list-style-type: none"> <li>Customization- Customer modified a PeopleSoft-delivered object.<br/>The object compare status will appear as CHANGED/UNCHANGED in the PUM source.</li> <li>Custom- Customer has created a net new object.<br/>The object compare status will appear as ABSENT in the PUM source.</li> <li>False Positive customization- Customer has not modified a PeopleSoft-delivered object. However, it appears as customized due to unintended saves, troubleshooting edits and so on.<br/>The object compare status will appear as SAME in the PUM source.</li> </ul> |
| Exporting the Customization Project                                    | This step exports only the Customization project definition to a file from the PUM source database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Exporting the Custom Customization Project                             | This step exports only the Custom project definition to a file from the PUM source database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Exporting the False Positive Customization Project                     | This step exports only the False Positive customization project definition to a file from the PUM source database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Uploading Customization metadata to Insights database                  | This step uploads the Customization metadata to the Insights database from the file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Uploading Custom Customization metadata to Insights database           | This step uploads the Custom metadata to the Insights database from the file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Uploading False Positive Customization metadata to Insights database   | This step uploads the False Positive customization metadata to the Insights database from the file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Step                                                    | Description                                                                                                                                                                                                             |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exporting PUM Metadata to File                          | Exports the PUM metadata from the PUM source database to a file.<br>This step exports only a subset of the PUM metadata that is required to set up LCM Insights.                                                        |
| Importing PUM metadata from file into Insights database | This step imports the PUM metadata from file to the Insights database.<br>PUM metadata is used by the LCM Insights to provide details on how the PeopleSoft delivered maintenance (objects) impact your customizations. |
| Run Customization Counts Process                        | This step creates object count as part of the preprocessing activity to set up LCM Insights.                                                                                                                            |

## Step2: Preprocessing Metadata for Setting Up LCM Insights

The setup is completed by using the PreProcessing Data for Maintenance Insights page in PIA on the Insights database. Use this page to process the incremental updates to customization, usage, PUM, and test metadata.

Navigation

**PeopleTools**, and then **Lifecycle Tools**, and then **Setup LCM Insights**

### Preprocessing Customization Metadata

The Customization page updates the status of previously identified objects (those identified during the comparison process in Change Assistant) based on their status in the Insights database. If a previously identified custom object is replaced with a PeopleSoft-delivered object, the Insights database reflects a decrease in the count of custom objects by one.

You can identifying net new custom objects during incremental customization synchronization with REST APIs. You don't have to rely on Change Assistant.

During incremental customization metadata synchronization, the system identifies new custom objects and updates the customization metadata without replacing the entire repository. Objects that exist in the customization definition but no longer exist in the managed object project are marked deleted. Objects that exist in the managed object project but not in the customization definition are marked added.

When newly identified objects can be validated against the PUM Source, they are classified as PeopleSoft-delivered customizations or customer-added custom objects.

If no PUM Source is defined and validation cannot be completed, the objects are assigned to the UNKNOWN customization grouping.

This example illustrates the fields and controls on the PreProcessing Data for Maintenance Insights- Customization page. You can find definitions for the fields and controls later on this page.

Select the Load Customization Data option to enable users to update customization metadata if there are incremental customizations after the initial load by Change Assistant. The Insights database will reflect the updated customizations.

You can set a schedule with a recurrence option.

Click Run Now to run this job. The status, such as, Success or Failed, will be displayed on the History grid.

### Preprocessing Usage Metadata

Use the Usage page to process the usage metadata.

Usage metadata for use with the Insights is collected through Usage Monitor. For details, review Usage Monitor: Enabling Usage Monitor.

'Usage data' implies data collected by the Usage Monitor in a Production environment. If the Production environment is not available, data from an alternate source can be used.

However, this alternate environment cannot be the same as the Test data source defined in the subsequent Preprocessing Test Metadata section.

This example illustrates the fields and controls on the PreProcessing Data for Maintenance Insights- Usage page. You can find definitions for the fields and controls later on this page.

**Table 17-1 Loading Usage Metadata for LCM Insights**

| Field               | Description                                                                           |
|---------------------|---------------------------------------------------------------------------------------|
| Load Usage Data     | Select this option to enable usage data processing.                                   |
| Load from Remote DB | Select this option to retrieve data from an alternate environment or remote database, |

**Table 17-1 (Cont.) Loading Usage Metadata for LCM Insights**

| Field                 | Description                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Usage Source   | Before loading from remote database, configure the remote database using this link.<br>On the Define Usage Source page you can enter the remote database details and the data gets retrieved with PeopleSoft Integration Broker.<br>Refer the subsequent Define Usage Source section.                                                                                     |
| Schedule              | Use this option to schedule the loading of usage metadata.                                                                                                                                                                                                                                                                                                                |
| Retain History (Days) | Enter the number of days to retain historical usage metadata.<br>After the Usage metadata synchronization completes, the system calculates the retention date by subtracting the specified number of days from the current date. The system then deletes Usage metadata rows with a Last Used date older than the calculated retention date.<br>The default value is 365. |

### Define Usage Source

On this page, enter the details of the remote database that holds the usage data.

| Field or Control | Description                                                                |
|------------------|----------------------------------------------------------------------------|
| Database Name    | Enter the database name.                                                   |
| Description      | Use this field to provide a more detailed description of the new database. |

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                           |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Host Name            | Enter the hostname of the webserver for the target database.                                                                                                                                                                                                                                                                          |
| Port Number          | Enter the port number of the webserver for the usage database.<br>This is the port used to create the REST Base URL.                                                                                                                                                                                                                  |
| Node Name            | Enter the default local node name of the usage database.<br>This is the node used to create the REST Base URL.                                                                                                                                                                                                                        |
| Use Https            | Select this option to build the REST Base URL with https://. If you do not select this option, the URL is built with http://.<br>When selected, the usage metadata call uses TLS, which provides confidentiality, integrity protection, and server authentication.                                                                    |
| Fetch DB Information | Click this button to invoke REST API for the environment specified as the hostname.<br>If the connection is successful, the REST API returns basic database information, such as, PeopleTools version of the usage source database, languages installed, and base language.<br>This information is stored in the PUM source database. |

## Preprocessing PUM Metadata

To load PUM metadata, use the PUM page.

This example illustrates the fields and controls on the PreProcessing Data for Maintenance Insights- PUM page. You can find definitions for the fields and controls later on this page.

Select Load PUM Data option to enable PUM metadata processing.

This option updates the PUM metadata in the Insights database to reflect changes to the PUM source that happened after the initial load in Change Assistant. The changes to the PUM source can happen either through a PRP apply or replacement of the existing PUM source with a new one.

This option removes the need to complete all the processing steps in Change Assistant to update the PUM metadata in the Insights database.

**Note**

This option also picks the PUM Image number of the PUM Image from which the PUM metadata was obtained, and then displays this Image number on the Insights dashboard.

Click Define PUM Source link to configure the PUM source database.

For details, refer the subsequent Define PUM Source section.

**Define PUM Source**

On the Define PUM Source page you can enter the details of the database that has PUM metadata. The data gets retrieved with PeopleSoft Integration Broker.

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                           |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Database Name        | Enter the database name.                                                                                                                                                                                                                                                                                                              |
| Description          | Use this field to provide a more detailed description of the new database.                                                                                                                                                                                                                                                            |
| Host Name            | Enter the hostname of the webserver for the PUM metadata database.                                                                                                                                                                                                                                                                    |
| Port Number          | Enter the port number of the webserver for the PUM metadata database.<br>This is the port used to create the REST Base URL.                                                                                                                                                                                                           |
| Node Name            | Enter the default local node name of the test source database.<br>This is the node used to create the REST Base URL.                                                                                                                                                                                                                  |
| Use Https            | Select this option to build the REST Base URL with https://. If you do not select this option, the URL is built with http://.<br>When selected, the metadata call uses TLS, which provides confidentiality, integrity protection, and server authentication.                                                                          |
| Fetch DB Information | Click this button to invoke REST API for the environment specified as the hostname.<br>If the connection is successful, the REST API returns basic database information, such as, PeopleTools version of the PUM metadata database, languages installed, and base language.<br>This information is stored in the PUM source database. |

**Preprocessing Test Metadata**

Use the Test page to process the test metadata.

Test metadata for use with the Insights is collected through Usage Monitor and does not require the use of PeopleSoft Test Framework (PTF). For details, review, Usage Monitor: Enabling Usage Monitor.

This data helps the customers to understand the maintenance cost of their customization.

'Test data' implies data collected by Usage Monitor in a Test environment. If this environment is not available, data from an alternate source can be used.

However, this alternate environment cannot be the same as the Usage data source defined in the preceding Preprocessing Usage Metadata section.

This example illustrates the fields and controls on the PreProcessing Data for Maintenance Insights- Test page. You can find definitions for the fields and controls later on this page.

**Table 17-2 Loading Test Metadata for LCM Insights**

| Field                 | Description                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Load Test Data        | Select this option to enable test metadata processing.                                                                                                                                                                                                                                                                                                                |
| Load from Remote DB   | Select this option to retrieve data from an alternate environment or remote database.                                                                                                                                                                                                                                                                                 |
| Define Test Source    | Before loading from remote database, configure the remote database using this link. For details, see the subsequent Define Test Source section.                                                                                                                                                                                                                       |
| Schedule              | Use this option to schedule the loading of test metadata.                                                                                                                                                                                                                                                                                                             |
| Retain History (Days) | Enter the number of days to retain historical test metadata.<br>After the test metadata synchronization completes, the system calculates the retention date by subtracting the specified number of days from the current date. The system then deletes test metadata rows with a Last tested date older than the calculated retention date. The default value is 365. |

### Define Test Source

On the Define Test Source page you can enter the details of the database that has test usage data. The data gets retrieved with PeopleSoft Integration Broker.

Define Test Source

Save X

Database Name

HR92

Description

Remote Test Source

Host Name

http://dep3300u.appsdev.fusionappsdev

Port Number

8000

Node Name

H92T863

Use Https

☒

OPRID

PS

Password

.....

Fetch DB Information

| Field or Control | Description                                                                                                                |
|------------------|----------------------------------------------------------------------------------------------------------------------------|
| Database Name    | Enter the database name.                                                                                                   |
| Description      | Use this field to provide a more detailed description of the new database.                                                 |
| Host Name        | Enter the hostname of the webserver for the test source database.                                                          |
| Port Number      | Enter the port number of the webserver for the test source database.<br>This is the port used to create the REST Base URL. |
| Node Name        | Enter the default local node name of the test source database.<br>This is the node used to create the REST Base URL.       |

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                                 |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use Https            | Select this option to build the REST Base URL with https://. If you do not select this option, the URL is built with http://.<br><br>When selected, the metadata call uses TLS, which provides confidentiality, integrity protection, and server authentication.                                                                            |
| Fetch DB Information | Click this button to invoke REST API for the environment specified as the hostname.<br><br>If the connection is successful, the REST API returns basic database information, such as, PeopleTools version of the test usage database, languages installed, and base language.<br><br>This information is stored in the PUM source database. |

## Deploying Insights Dashboards

After you create, consolidate, and preprocess the metadata required for Insights, deploy the dashboards to make the Insights available.

Use the Deploy Insights Dashboards page to deploy the dashboards.

Select **PeopleTools**, **SearchFramework**, **Administration**, **Deploy Insights Dashboards**.

You can deploy the following dashboards:

- My Customization Groups
- My Customized Objects
- Customization Insights Dashboard

This example illustrates the fields and controls on the Deploy Insights Dashboards. You can find definitions for the fields and controls later on this page.

| Deploy Insights Dashboards                                                        |                                                          |                                                              |
|-----------------------------------------------------------------------------------|----------------------------------------------------------|--------------------------------------------------------------|
| 99 rows                                                                           |                                                          |                                                              |
| <input type="checkbox"/> Dashboard Name <small>↑↓</small>                         | <input type="checkbox"/> Deploy Status <small>↑↓</small> | <input type="checkbox"/> Replace Dashboard <small>↑↓</small> |
| <input type="checkbox"/> Absence Event Insight Tile                               | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="checkbox"/> Application - External vs Internal                       | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="checkbox"/> U.S. Payroll Cost Tile                                   | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="checkbox"/> Canada Payroll Cost Tile                                 | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="checkbox"/> Reported Time Insight Tile                               | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="checkbox"/> Workforce Equity Tile                                    | Deployed                                                 | <input type="checkbox"/>                                     |
| <input checked="" type="checkbox"/> My Customization Groups                       | Deployed                                                 | <input type="checkbox"/>                                     |
| <input checked="" type="checkbox"/> My Customized Objects                         | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="checkbox"/> My Customizations                                        | Deployed                                                 | <input type="checkbox"/>                                     |
| <input type="button" value="Deploy"/> <input type="button" value="Reset Status"/> |                                                          |                                                              |

| Field or Control         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Dashboard Name</b>    | The delivered dashboards are listed on the Deploy Insights Dashboards page.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Deploy Status</b>     | Displays the status of the dashboard, that is, as deployed or undeployed.                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Replace Dashboard</b> | <p>If you modify a dashboard after it has been imported to PeopleSoft, use the <b>Replace Dashboard</b> button to overwrite the dashboard that already exists in OpenSearch Dashboards server. When you enable this button, it copies the dashboard to the OpenSearch server and replaces the new dashboard in the target environment.</p> <p>By default, it is disabled.</p> <p>When you select a single dashboard and the Replace Dashboard button is not enabled, a popup appears with the option to replace the dashboard.</p> |
| <b>Deploy</b>            | <p>Deploy button deploys the Customization dashboard to your instance of OpenSearch Dashboards.</p> <p>You can also use the deploy option when you migrate dashboards from one environment to another, for example, from a testing environment to the production environment.</p>                                                                                                                                                                                                                                                  |
| <b>Reset Status</b>      | <p>Reset Status button resets the dashboard status from Deployed to Undeployed. The default dashboard status is Undeployed.</p> <p>The dashboard remains in OpenSearch Dashboards after a reset.</p>                                                                                                                                                                                                                                                                                                                               |

### Assign Roles to Access Dashboards

PeopleSoft applications assign certain roles to the delivered Customization dashboards that enable users to view and use the dashboards and visualizations.

To assign roles:

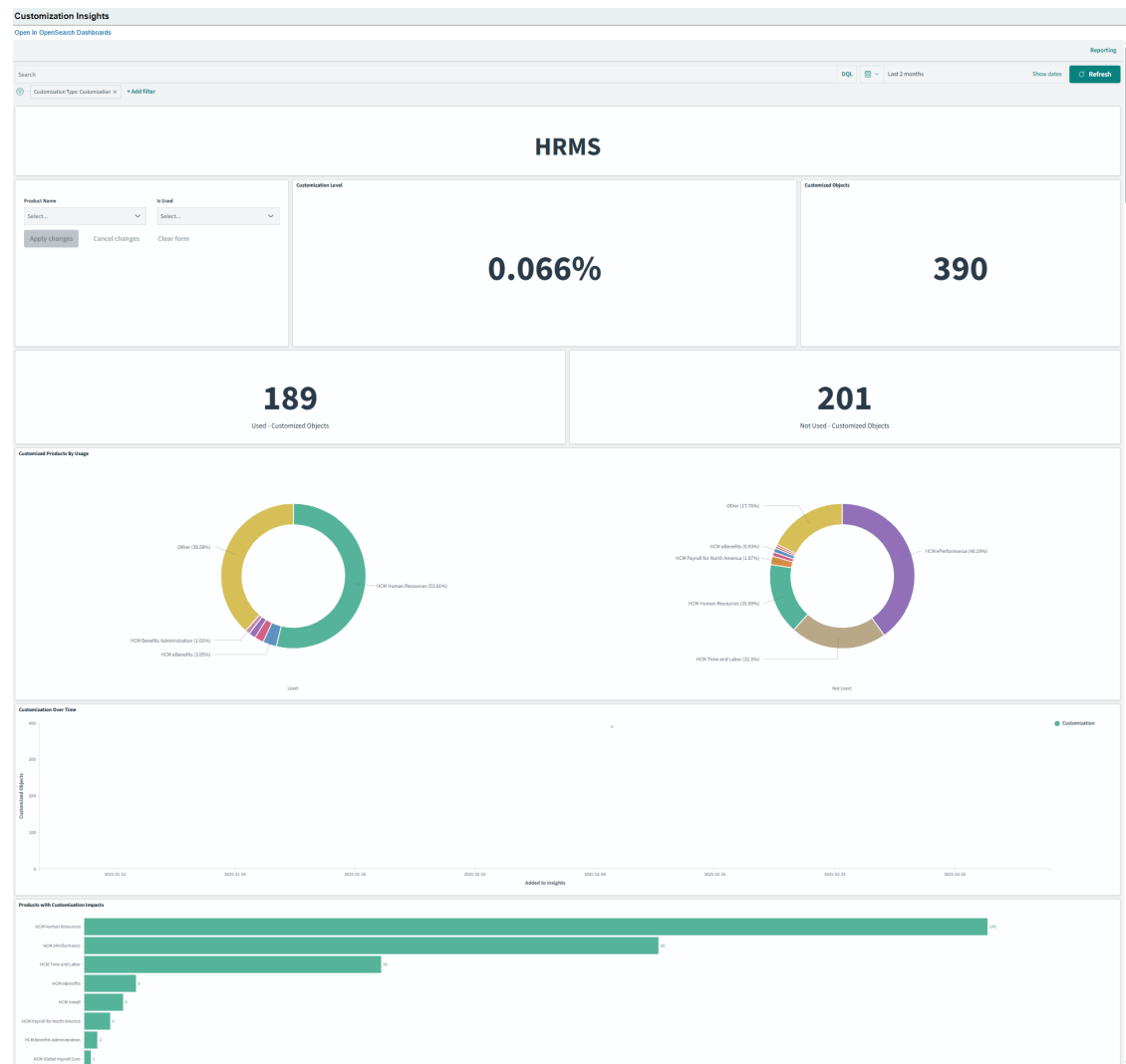
1. Navigate to **PeopleTools**, and then **Security**, and then **User Profile**, and then **User Profiles**.
2. On the User Profiles page, select the following roles:
  - Lifecycle Updates: This role is required to access the Customization Insights dashboard.
  - Lifecycle Tools: This role is required to access the Customization Insights dashboard.
  - Customization Admin: This role is required to access Customization Group and My Customized Objects dashboards.
  - Customization User: This role is required to access the Customization Group dashboard.
  - Lifecycle Updates: With this role you can access the Customization Insights dashboard.
  - LifeCycle Tools: With this role you can access the My Customization Groups and My Customized Objects dashboards.

# Reviewing LCM Insights

LCM Insights can be configured for any PeopleSoft application, such as FSCM, HCM, Campus Solutions, and so on.

It requires 8.62 and higher version of PeopleSoft Update Image.

This is an example of a Customization Insights page.



# Working with Customization Groups

## Understanding Customization Groups

Customization Groups provide a high level functional impact of the customizations in the system. This can be used by the administrative and executive level users.

It is a collection of managed objects that are grouped together to represent a business customization, related object set, maintenance impact area, or project-based grouping.

Customization groups help you:

- Group related managed objects under a meaningful customization or maintenance category.
- Identify which customizations require attention during maintenance, upgrade planning, or optimization.
- Filter Insights by various attributes available like groups, owner, complexity, and so on, and display as visualization. Then take actions based on these Insights.

From PeopleTools 8.63 you are provided with the following two different Insights dashboard:

- My Customized Objects page- This dashboard is used to review individual customized managed objects and analyze object-level details. It is used by the administrator level users.
- My Customization Groups page- This dashboard focuses on how those customized objects are grouped for ownership, maintenance, impact analysis, and follow-up action. It is used by both administrator and executive level users.

## Using Manage Group Settings Page

Before you can create and maintain Customization Groups, use the Manage Group Settings page to define the group setting values, such as, customization categories, customization type, and role.

On this page, you can:

- find PeopleSoft-delivered customization categories, customization type, and role.
- add and manage your own customization types, categories, and roles to match how your organization assigns work.

The values defined on this page are used by Customization Groups for filtering, reporting, and dashboard analytics.

The Manage Group Settings page is intended for setup and administration.

Navigate to PeopleTools, Lifecycle Tools, Customization Groups, Manage Group Settings.

This example illustrates the fields and controls on the Manage Group Settings page.

The screenshot shows the 'Manage Group Settings' page. At the top right is a 'Save' button. Below the title bar is a 'Search Criteria' section with a dropdown menu for 'Attribute' currently set to 'Customization Type'. To the right are 'Search' and 'Clear' buttons. Below this is a 'Search Results' section showing a table with 3 rows. The table has two columns: '\*Attribute' and '\*Attribute Value'. The first row shows 'Customization Type' with the value 'Functional Customization'. The second and third rows show 'Customization Type' with values 'Maintenance Impact Group' and 'Related Object Group' respectively, each with '+' and '-' buttons for editing.

| *Attribute           | *Attribute Value         |
|----------------------|--------------------------|
| 1 Customization Type | Functional Customization |
| 2 Customization Type | Maintenance Impact Group |
| 3 Customization Type | Related Object Group     |

## Customization Type

The Customization Type attribute provides a high-level classification of the Customization Group. Use this attribute to filter and analyze data in Insights.

The PeopleSoft delivered customization types are:

- Functional Customization
- Related Object Group
- Maintenance Impact Group

These appear as Group Type values in the Manage Groups page where you create your new Customization group.

You can create your own group type.

## Customization Category

Use the Customization Category attribute to classify Customization Group by functional area or business process, such as, Core HR or Tech/IT Requirements.

## User Role

The User Role attribute specifies the user or role responsible for the Customization Group. Multiple owners can be associated with a group.

PeopleSoft-delivered roles are:

- Functional Analyst
- Line of Business Owner
- Development Lead
- Test Lead

You can create your own role. For example, if you define a user role UX developer, its appears as a responsibility on the Manage Groups page.

## Using My Customized Objects Page

The My Customized Objects page is used to review, manage customized objects and groups associated with those objects.

You need Customization Admin role to access this page. For details on assigning roles, see [Deploying Insights Dashboards](#)

This page also provides an Actions menu where you can select customized objects and add them to a new or existing customization group for ownership, categorization, and impact analysis.

So basically you use this page to review the Insights and then take actions based on these Insights.

For example, click on HCM Benefits in Products with Customization Impacts visualization, and the page reloads to show only the objects related to that selected product or impact area. You can use the objects to create a new business-relevant customization group.

Navigate to **PeopleTools, Lifecycle Tools, Customization Groups, My Customized Objects**.

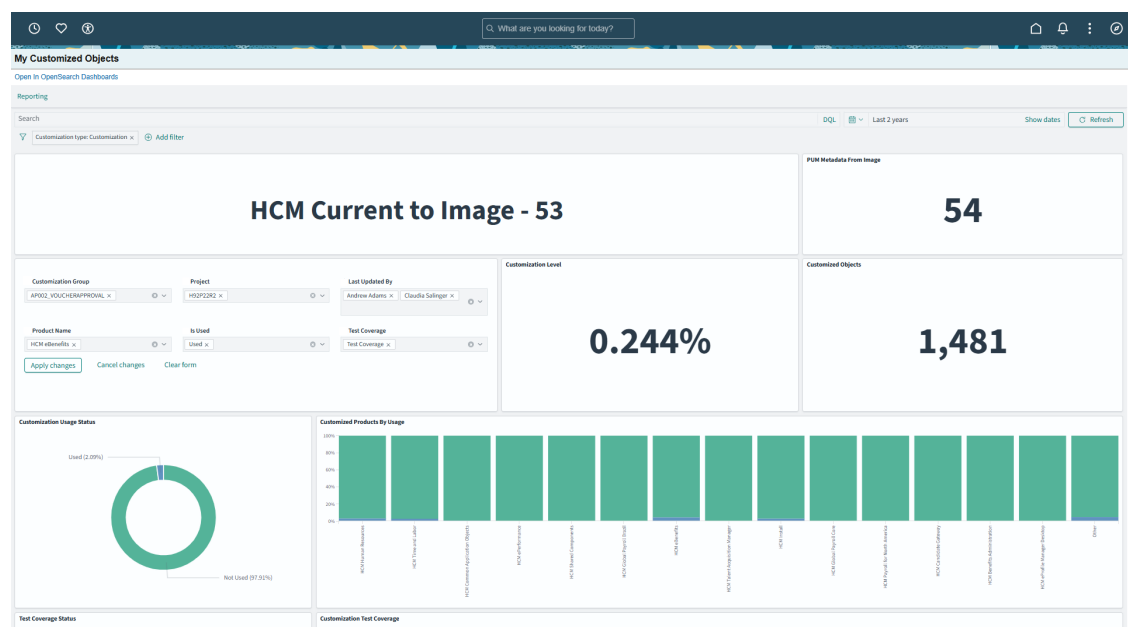
### Note

The Actions menu is available at bottom of the PIA page.

## Filters and Visualizations to Review Customized Objects

The summary tiles and visualizations provide object-level context, including customization level, customized object count, usage status, and test coverage.

This example illustrates the fields and controls on the My Customized Objects page.



| Summary Information Tile            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Environment information tile</b> | Displays the selected environment and Image level. For example, HCM Current to Image - 53.                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>PUM Metadata From Image</b>      | Displays the PeopleSoft Update Image that supplied the PUM metadata used by the dashboard. In the example, the PUM metadata is from Image 54. PUM metadata is used by LCM Insights to determine how delivered maintenance impacts customizations.                                                                                                                                                                                                                                                                  |
| <b>Customization Level</b>          | Displays the calculated customization level for the current object-level result set and selected filters. On this page, the value provides context for the customized objects being reviewed.                                                                                                                                                                                                                                                                                                                      |
| <b>Customized Objects</b>           | Displays the number of customized managed objects included in the current dashboard result set. A customized object is a PeopleSoft-delivered object that has been modified by the customer. This value changes based on the filters applied on the page, such as Customization Group, Project, Product Name, Last Updated By, Is Used, and Test Coverage. Use this value to understand the size of the object-level customization scope that you are currently reviewing.<br>In this example, the value is 1,481. |

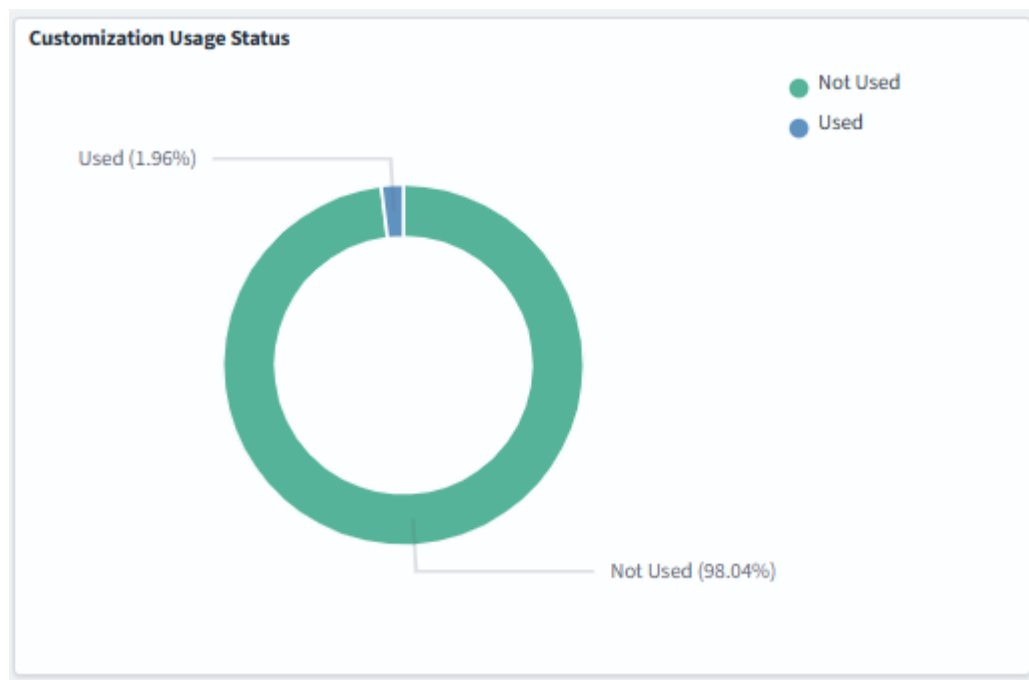
Use these options to filter the Insights:

- Customization Group- Select a Customization Group to limit the page results to objects that belong to that group. Use this filter when reviewing or managing objects associated with a specific group.
- Project- Select a project to limit results to customized objects associated with that project. This filter is useful when reviewing project-based customization impact or MO Project-related data.
- Last Updated By- Select one or more users to display objects last updated by those users.
- Product Name- Select a product to display customized objects associated with that product. Use this filter to review product-specific customization impact.
- Is Used- Select a usage status, such as Used, to limit results based on whether the customized objects are referenced in Usage Repository data. The other value is Not Used
- Test Coverage- Select a test coverage value to limit results based on whether customized objects have related test coverage. Use this filter to identify objects that are covered by tests or objects that may require additional testing. The values are: No Value, Test Coverage, Test Gap, and Test But Not Used.

### Customization Usage Status

Customization Usage Status displays the percentage of customized objects that are used and not used based on Usage Repository data. Use this to identify how many customized objects in the current result set are actively referenced. Objects that are not used may require additional review before upgrade, maintenance, or cleanup decisions are made.

This example illustrates the fields and controls on the Customization Usage Status.



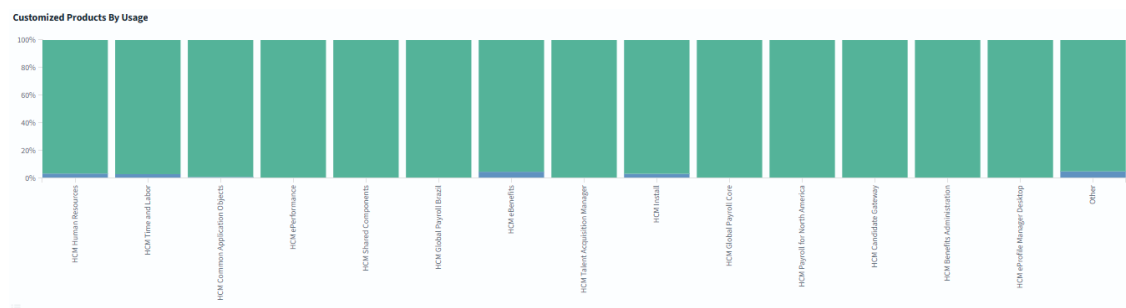
**Note**

The percentages shown in this chart depend on the filters applied to the dashboard and the usage metadata loaded into Lifecycle Management Insights. If usage data has not been loaded or usage calculation has not been run, the chart may not reflect current usage activity. Usage data is processed through the Usage Repository and can be loaded from a production or alternate environment.

### Customized Products By Usage

Customized Products By Usage compares usage status across customized PeopleSoft products.

This example illustrates the fields and controls on the Customized Products By Usage page.



X-axis lists PeopleSoft products such as HCM Human Resources, HCM Time and Labor,

Y-axis displays usage distribution from 0% to 100%.

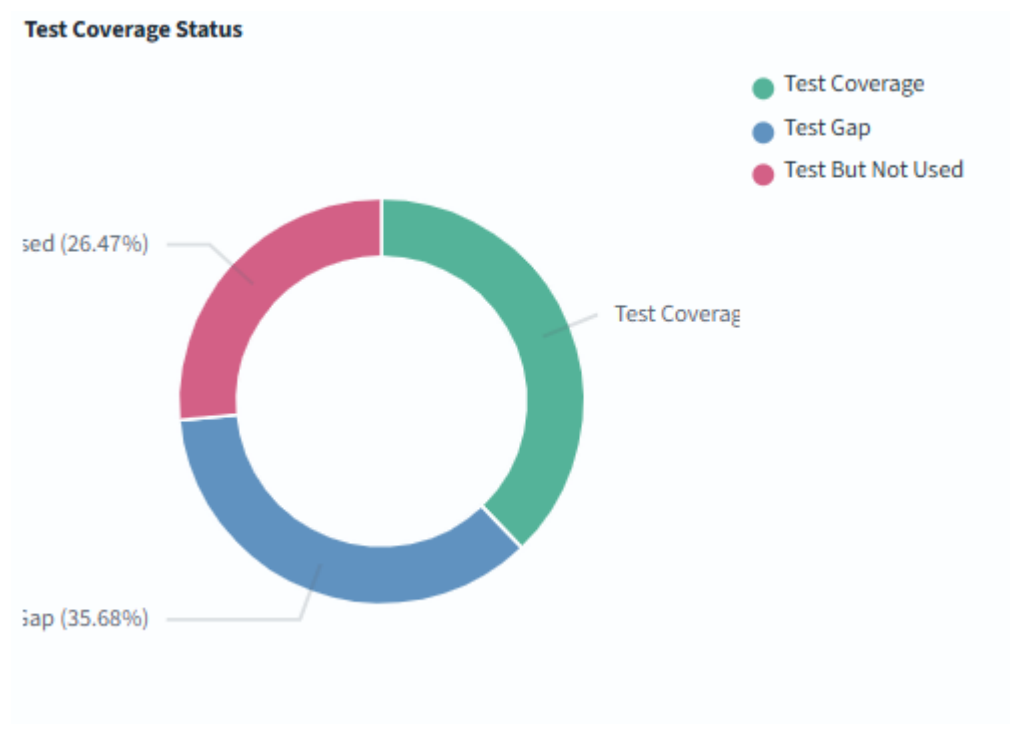
The available segments are:

- Green- indicates customized objects that do not have usage data.  
The value displayed is Not Used; which represents objects that are not identified as used in the Usage Repository data for the selected dashboard context.
- Blue- Indicates customized objects that have usage data.  
The value displayed is Used, which represents objects identified as used based on Usage Repository data and usage calculation.

### Test Coverage Status

Use the Test Coverage Status to review the test coverage status of customizations for the selected Customization Groups. This visualization compares customizations that are covered by tests, customizations that have no associated tests, and customizations that have associated tests but are not currently used in the Production environment.

This example illustrates the fields and controls on the Test Coverage Status.



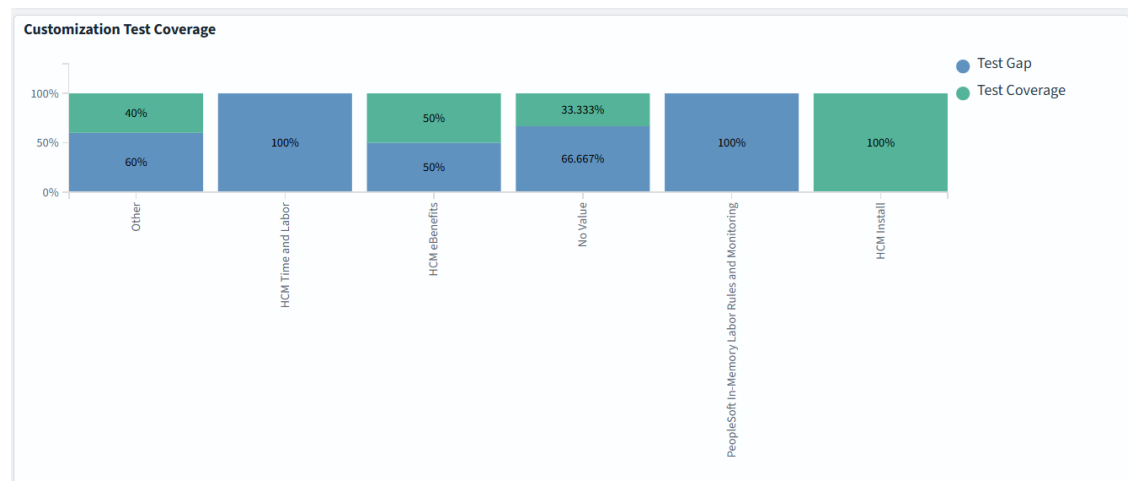
The available segments are:

- Test Gap- indicates the percentage of customizations that do not have associated tests. In this example, this is shown as the blue segment and represents 35.68%. Use this segment to identify customizations that may need additional test coverage.
- Test Coverage- indicates the percentage of customizations that are actively covered by tests.
- Test But Not Used- indicates the percentage of customizations that have associated tests but are not currently used in Production. Use this segment to review tests that may no longer be required, or to verify whether the related customization is still needed.

## Customization Test Coverage

Use Customization Test Coverage to review the percentage of customizations that have test coverage and the percentage of customizations that have a test gap. Use this information to identify areas where additional test coverage may be required before applying maintenance or reviewing upgrade impact.

This example illustrates the fields and controls on the Customization Test Coverage.

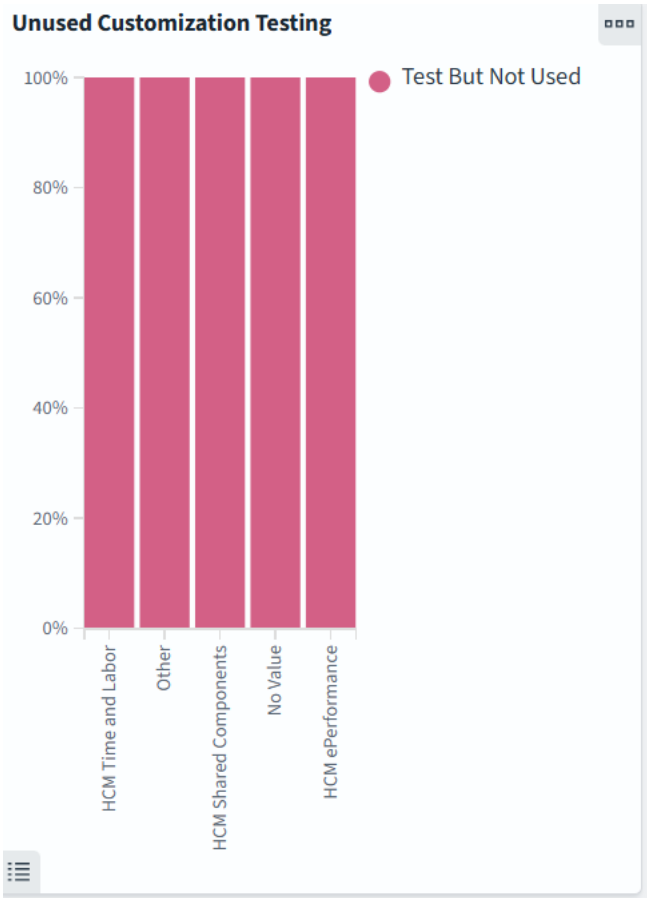


The available segments are:

- **Test Gap**- Indicates the percentage of customizations that do not have associated test coverage. In this example, this value is shown in blue.
- **Test Coverage**- Indicates the percentage of customizations that have associated test coverage. In this example, this value is shown in green.

## Unused Customization Testing

Unused Customization Testing helps you identify products that have test cases associated with customizations that are no longer used in the production environment.



**Unused Testing Object Details**

Use Unused Testing Object Details to review customized objects that have associated tests but are not currently used.

This detailed view helps administrators identify test assets that may no longer apply to active customizations and determine whether the tests should be retained, updated, or removed.

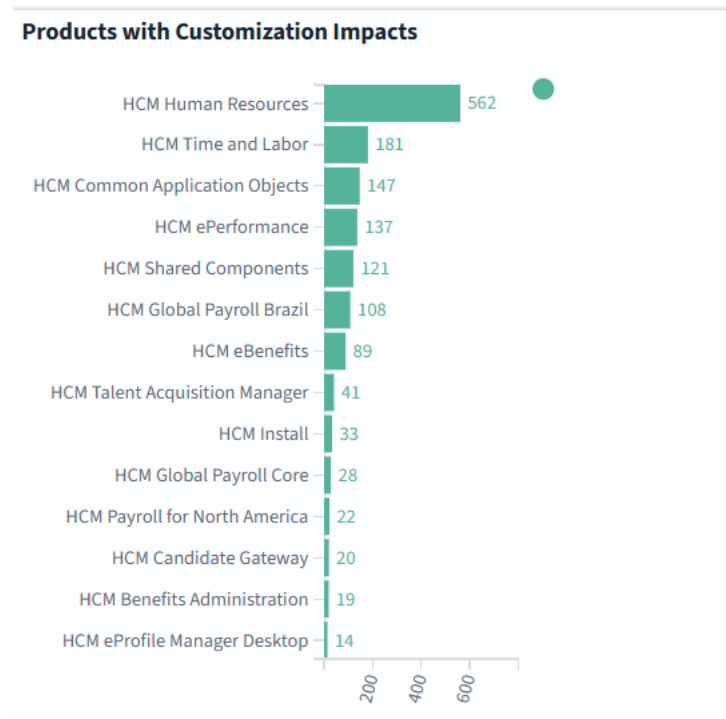
| Unused Testing Object Details |                    |                |                |                |                  |                 |
|-------------------------------|--------------------|----------------|----------------|----------------|------------------|-----------------|
|                               |                    |                |                |                |                  |                 |
| Object Type                   | Object Value 1     | Object Value 2 | Object Value 3 | Object Value 4 | Product Name     | Last Updated... |
| Role                          | Benefits Administr | No Value       | No Value       | No Value       | HCM Human Resou  | FSMITH          |
| Record                        | GDP_TMPL_ITEM      | No Value       | No Value       | No Value       | HCM Shared Comp  | LKHOO           |
| Record                        | GDP_ITEM_LNG       | No Value       | No Value       | No Value       | HCM Shared Comp  | LKHOO           |
| Page PeopleCode               | TL_OT_RQST         | Activate       | No Value       | No Value       | HCM Time and Lab | KUTLWC01        |
| Page PeopleCode               | TL_OT_REQHIST_S    | Activate       | No Value       | No Value       | HCM Time and Lab | MBERGER         |
| Page PeopleCode               | TL_OT_PGLT         | Activate       | No Value       | No Value       | HCM Time and Lab | MBERGER         |
| Page PeopleCode               | TL_OT_MNGR_LIS1    | Activate       | No Value       | No Value       | HCM Time and Lab | MBERGER         |
| Page PeopleCode               | TL_OT_EVENTS       | Activate       | No Value       | No Value       | HCM Time and Lab | MBERGER         |
| Page PeopleCode               | EP_CREATE_M_RS_    | Activate       | No Value       | No Value       | HCM ePerformanc  | JHOFFMAN        |
| Application Engine            | BN_BEN500_AE       | EXSTJOB        | No Value       | No Value       | No Value         | WSMITHERSON     |

< 1 2 >

## Products with Customization Impacts

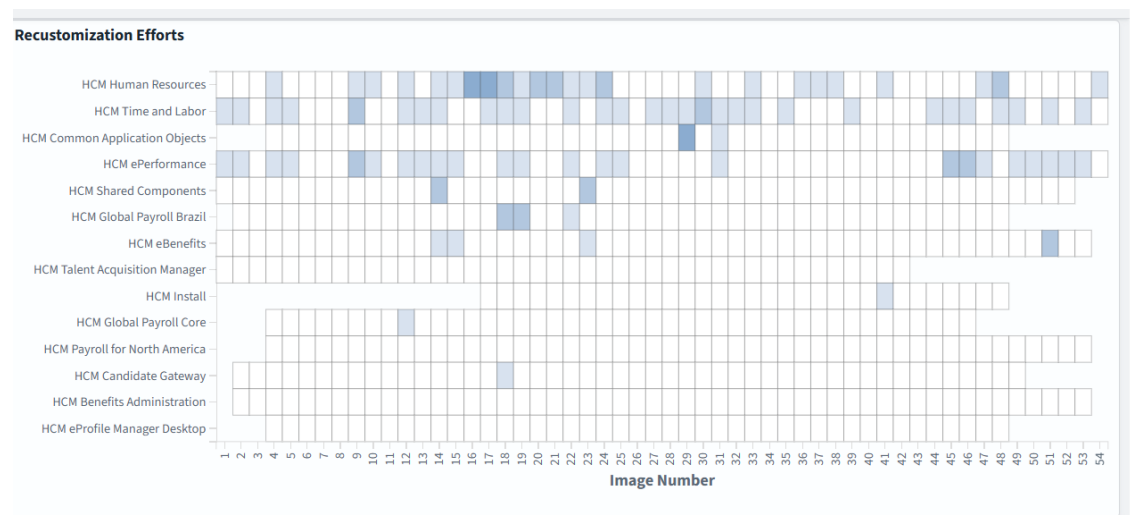
Use Products with Customization Impacts to review the number of customization impacts by product.

This helps you identify the products with the highest number of impacted customizations so that you can prioritize analysis and retrofit planning.



## Recustomization Efforts

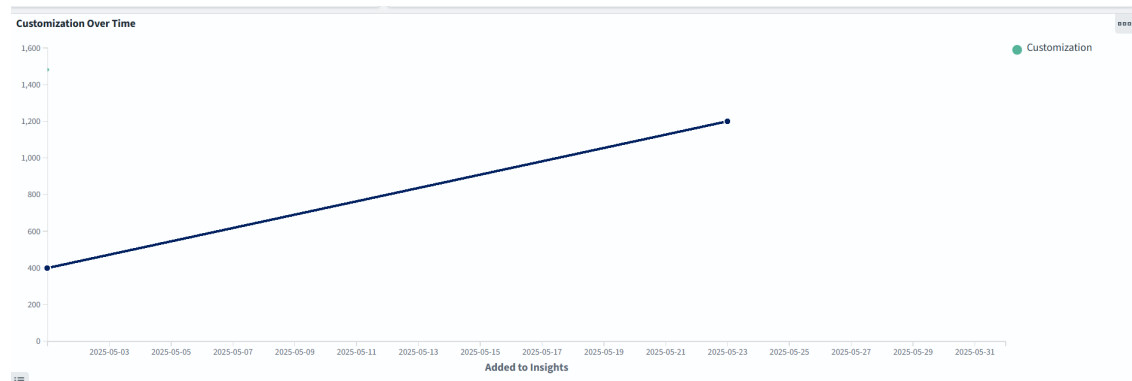
Use Recustomization Efforts to identify products that have recustomization effort across PeopleSoft Images.



The shaded cells indicate where recustomization effort exists for a product and Image number. Review the shaded cells to determine which product areas may require additional retrofit analysis.

### Customization Over Time

Use the Customization Over Time to view the number of customizations added to Insights over time.



The Added to Insights axis displays the date that the customization data was added to Insights.

The vertical axis displays the number of customizations.

Use this visualization to identify changes in customization volume and to determine whether a specific load or synchronization added customization data to Insights.

## Managing Customization Groups from the Actions Menu

Using Actions menu you can create a customization group, add customized objects to an existing customization group, and remove selected customized objects from a customization group

### Note

A customization group contains managed objects that are grouped together for analysis, ownership, testing, and maintenance planning. Creating or updating a group does not create or delete the managed objects themselves; it changes the association between the objects and the group.

This example shows the Actions menu.

**My Customized Objects**

**Actions**

- Create a new Customization Group with Selection
- Add Selection to Existing Customization Group
- Remove Selection From Customization Group

| Object Types 1: | Object Value 1 1: | Object Value 2 1: | Object Value 3 1: | Object Value 4 1: | Customization type 1: | Product Name 1:             | Is Used 1: | Test Coverage 1: |
|-----------------|-------------------|-------------------|-------------------|-------------------|-----------------------|-----------------------------|------------|------------------|
| Record          | AAP_TBL           |                   |                   |                   | Customization         | HCM Human Resources         | Not Used   |                  |
| Record          | AA_SUMM_JPN_VW    |                   |                   |                   | Customization         | HCM Human Resources         | Not Used   |                  |
| Record          | ABER_TYPE_LNG     |                   |                   |                   | Customization         | HCM Human Resources         | Not Used   |                  |
| Record          | ABER_TYPE_TBL     |                   |                   |                   | Customization         | HCM Benefits Administration | Not Used   |                  |
| Record          | ABSENCE_HIST      |                   |                   |                   | Customization         | HCM Human Resources         | Not Used   |                  |
| Record          | ABSENCE_SHP_GBR   |                   |                   |                   | Customization         | HCM Human Resources         | Not Used   |                  |

The options are:

- Create a new customization group with selection-** Select the objects to create a new customization group.  
After creating a customization group, you can give details such as a description, group type, group category, owner/responsibility information, and comments on the Manage Groups page. Refer [Using Manage Groups Page](#)
- Add selection to existing customization group-** Select the objects that you want to add to the existing customization group. After the objects are added, you get the option to open the updated customization group on the Manage Groups page.
- Remove selection from Customization group-** Select the objects that you want to remove from the customization group. After the objects are removed, you get the option to open the updated customization group on the Manage Groups page.

## Using Manage Groups Page

Use the Manage Groups page to define and maintain customization groups for Customization Insights.

On this page you can create a new customization group or open an existing customization group to modify.

This page also lets you to update a customization group by using objects from a managed object project.

Also, when you select an action from the Actions menu on the My Customized Objects page, the system opens the corresponding customization group on this page.

Navigate to PeopleTools, Lifecycle Tools, Manage Groups.

This example illustrates the fields and controls on the Manage Group page.

Manage Groups

ABS\_TEST  
Return to Search

Save

Details

Group Description

Absence Management

Group Type

Functional Customization

Group Creation Date

07/07/2026 10:27PM

Priority

3

Additional Details

Voucher Approval

Active

☒

Group Category

Core HR

Last Updated User

JPB, PeopleSoft Superuser

Complexity

Medium

Insights

View My Customized Objects

View My Customization Group

Contacts

| *Responsibility % | Owner %                | *UserID %                                            | Email %           |
|-------------------|------------------------|------------------------------------------------------|-------------------|
| 1                 | Line of Business Owner | <div><input checked="" type="checkbox"/></div> ADIAZ | Antonio Diaz Ruiz |

☒ Update Customization Group

Auto Update Customization Group

| Project Name % | Action % | Project Type %  |
|----------------|----------|-----------------|
| 1              |          | Managed Objects |

Attachments

| Attachment % |
|--------------|
| Add          |

| Field or Control    | Description                                                                                                                                                                                                                                                                 |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group Description   | Enter a description for the Customization Group.<br>Use a meaningful description that identifies the business function. For example, Absence Management.                                                                                                                    |
| Active              | Select to make the Customization Group active.<br>Clear this option if the group should no longer be used for analysis, filtering, or maintenance planning.                                                                                                                 |
| Group Type          | Select the type of customization group. This decide what appears on the dashboard<br>PeopleSoft-delivered values include Functional Customization, Related Object Group, and Maintenance Impact Group.<br>You can create your own values on the Manage Group Settings page. |
| Group Category      | Use this field to classify the group by functional area or business process, such as Core HR, Reporting, Integrations, and so on<br>You can create your own category on the Manage Group Settings page.                                                                     |
| Group Creation Date | Displays the date and time when the customization group was created.                                                                                                                                                                                                        |
| Last Updated User   | Displays the user detail who last updated the customization group.                                                                                                                                                                                                          |
| Priority            | Use this value to indicate how important the group is for maintenance planning, testing, ownership review, or update analysis.                                                                                                                                              |
| Complexity          | Use this value to indicate the expected effort required to analyze, maintain, or test the group.<br>PeopleSoft delivers five values, and those are Low, Medium, High, Medium-Low, and Medium-High.                                                                          |

| Field or Control            | Description                                                                                                                                                                                                                                                                                |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Additional Details          | Enter additional information about the customization group.                                                                                                                                                                                                                                |
| View My Customized Objects  | Opens the My Customized Objects page.<br>Use this link to see the different visualizations. You can review those, filter relevant customized objects, and using the Actions menu to create new customization group, update or remove customized objects from existing customization group. |
| View My Customization Group | Opens the My Customization Groups dashboard.<br>Use this link to review group-level analytics for the customization group.                                                                                                                                                                 |
| Contacts                    |                                                                                                                                                                                                                                                                                            |
| Responsibility              | Select the role or responsibility for the contact.<br>PeopleSoft-delivered roles include Functional Analyst, Line of Business Owner, Development Lead, and Test Lead.<br>You can define additional roles on the Manage Group Settings page.                                                |
| Owner                       | Select to identify the row as an owner for the customization group.<br>Multiple owners or responsible users can be associated with a group.                                                                                                                                                |
| UserID                      | Select the user ID for the person assigned to the selected responsibility.                                                                                                                                                                                                                 |
| User Name                   | Displays the name associated with the selected user ID.                                                                                                                                                                                                                                    |
| Email                       | Displays the email address for the selected user, when available.                                                                                                                                                                                                                          |

Using a Managed Object Project to Update a Customization Group

Use the Manage Groups page to update a customization group by adding or removing objects that are part of a managed object project.

Navigate to PeopleTools, Lifecycle Tools, Customization Groups, Manage Groups.

This example illustrates the fields and controls on the Update Customization Group option.

Manage Groups

3

Line of Business Owner

☒

ADIAZ

Q

Antonio Diaz Ruiz

+

-

☒

Update Customization Group

Auto Update Customization Group

1 row

| Project Name  | Action                                       | Project Type    |
|---------------|----------------------------------------------|-----------------|
| 1 APPS_SYS_ML | <div>Merge Add</div> <div>Merge Remove</div> | Managed Objects |

1 row

| Attachment | Add            |
|------------|----------------|
| 1          | <div>Add</div> |

Open your customizations group on the Manage Groups page, enable the Update Customization Group option, and then select the project and action to apply.

**Table 18-1 Manage Customization Using MO Objects**

| Field or Control           | Description                                                                                                                                                                                                                                                                                                                                         |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Update Customization Group | Select to enable the Auto Update Customization Group section. Use this option when you want to update the group by using objects from a managed object project.                                                                                                                                                                                     |
| Project Name               | Select the managed object project that contains the objects to add to, or remove from the customization group.                                                                                                                                                                                                                                      |
| Action                     | Select one of the following update action to apply to the selected project: <ul style="list-style-type: none"> <li>Merge Add- Adds objects from the selected project to the Customization Group.</li> <li>Merge Remove- Removes objects from the customization group when those objects were previously added from the selected project.</li> </ul> |
| Project Type               | Displays the type of project selected. In the example, the value is Managed Objects.                                                                                                                                                                                                                                                                |
| Add Row (+)                | Adds another project row to the grid.                                                                                                                                                                                                                                                                                                               |
| Delete Row (-)             | Removes the selected project row from the grid.                                                                                                                                                                                                                                                                                                     |

### Adding or Removing Objects on the Manage Groups Page

Use the Customized Objects section on the Manage Groups page to review the objects currently associated with a customization group and to add or remove individual objects.

This example illustrates the fields and controls on the Customized Objects section.

**Manage Groups**

**Customized Objects**

Object Type  
Record

Object Name

Search Clear

+

| Object Type ↑↓ | Object Value 1 ↑↓ | Object Value 2 ↑↓ | Object Value 3 ↑↓ | Object Value 4 ↑↓ | Customization ↑↓ | 3 Way Merge Enabled ↑↓ |   |
|----------------|-------------------|-------------------|-------------------|-------------------|------------------|------------------------|---|
| Record         | ABS_SHPL_GBR      |                   |                   |                   | Yes              | No                     | — |
| Record         | ABS_SPLIT_GBR     |                   |                   |                   | Yes              | No                     | — |
| Record         | ACA_1095C_DATA    |                   |                   |                   | Yes              | No                     | — |

Use the search criteria to locate objects, and then use the Add Row (+) or Delete Row (-) button to update the grid

## Working with My Customization Groups Dashboard

Customization Groups help you organize your Customization Insights into meaningful groups.

It is accessed by administrator and executive level user.

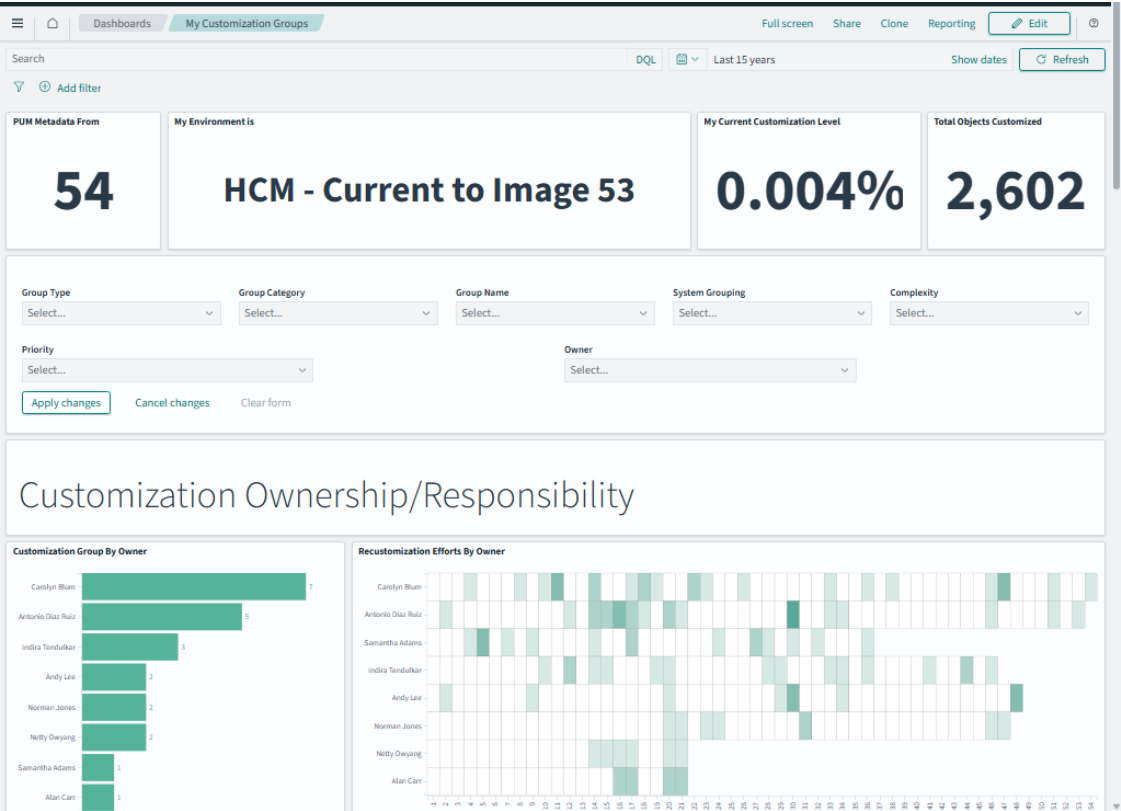
You can group customization by business function, impact, and so on.

This group-based view helps administrators decide which groups need review, ownership, testing, or maintenance action.

Users with Customization Admin and Customization User roles can access this page. For details on assigning roles, see [Deploying Insights Dashboards](#)

Select PeopleTools, Lifecycle Tools, Customization Groups, My Customization Groups.

This example illustrates the fields and controls on the Customization Groups Dashboards.



Use the My Customization Groups dashboard to review summary information and analytics for Customization Groups in the selected environment.

| Summary Information Tile | Description                                                                                                                                                                                                             |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PUM Metadata From        | Displays the PeopleSoft Update Image that supplied the PUM metadata used by the dashboard.<br><br>PUM metadata is used by LCM Insights to determine how PeopleSoft-delivered maintenance may impact customized objects. |
| My Environment is        | Identifies the selected product environment and its current maintenance position.<br><br>For example, HCM- Current to Image 53 indicates that the HCM environment is current through Image 53.                          |

| Summary Information Tile              | Description                                                                                                                                                                                                             |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>My Current Customization Level</b> | Displays the calculated customization level for the selected environment. Use this value to understand the overall customization footprint before reviewing detailed Customization Group analytics.                     |
| <b>Total Objects Customized</b>       | Displays the number of customized managed objects included in the current dashboard scope. Use this value with the customization level and group-level analytics to understand the size of the customization inventory. |

The various visualizations in this dashboard display data based on these filters:

- **Group Type-** Identifies the purpose or source of the group, such as whether the group represents a functional customization, a related object group, a maintenance impact group, project metadata, or a system-generated grouping.
- **Group Category-** Use this to review groups by higher-level business or functional area, such as business process, reporting, integrations, or other customer-defined categories.
- **Group Name-** Use this when you want to review analytics for a particular group instead of all groups that match the other selected filters.
- **System Grouping-** Identifies groups created and used by LCM Insights, such as the system-defined customization classifications.  
The values are Custom, Customization, and False Positive.
- **Complexity-** Use this to focus on groups that may require more or less effort to analyze, maintain, or test.  
Few PeopleSoft-delivered values are High, Low, and Medium. You cannot add or modify these values.
- **Priority-** Use this to focus on groups that are more important for maintenance planning, testing, ownership review, or update analysis.  
You can see values from 1 to 5, which are PeopleSoft-delivered values. The default value is 3, and users cannot add or modify the delivered priority values.
- **Owner-** Use this to review groups assigned to a specific owner, role, or responsibility area. PeopleSoft-delivered values include Functional Analyst, Line of Business Owner, Development Lead, and Test Lead.

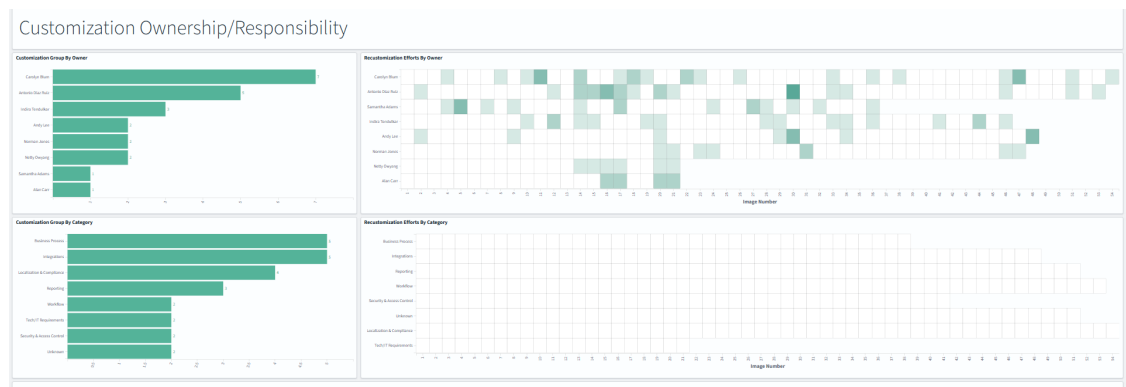
#### **Note**

The group category, group type, and owner (user role) fields are defined on the Manage Group Settings page. You can use the PeopleSoft-delivered categories types, and roles or create your own values.  
For details, see [Using Manage Group Settings Page](#)

## Customization Ownership and Responsibility

Use the Customization Ownership and Responsibility to review ownership and category-based analytics for customization groups. The page helps you identify the owners responsible for customization groups and the functional categories associated with those groups.

This example illustrates the fields and controls on the Customization Ownership and Responsibility.



The available segments are:

- **Customization Group By Owner**- you can see how ownership is distributed across the team.
- **Recustomization Efforts By Owner**- you can review maintenance impact by owner across Image numbers and see which owners are most impacted and where follow-up may be needed.
- **Customization Group By Category**- you can see how customizations are organized by high-level functional areas.
- **Recustomization Efforts By Category**- you can review maintenance impact by category across Image numbers and you can see which areas need the most attention during maintenance planning.

## Impact Projection

Use Impact Projection to review projected maintenance impact for customization groups. It displays impact counts, recustomization effort, test coverage, and usage information to help you determine which customization groups may require additional review before applying PeopleSoft Image updates.

This example illustrates the fields and controls on the Impact Projection.



The available segments are:

- Customization Impacts- provides group-level impact counts.
- Recustomization Efforts- provides details on groups that may need the most rework across Images.
- Test Coverage by Customization Group- shows how much testing activity is associated with each customization group, based on the available Test Repository data. Instead of checking test coverage object by object, you can see whether a full group, such as Benefits, Payroll, or Integrations, has enough test activity before maintenance or upgrade work begins.
- Customization Usage by Groups- displays the usage percentage for each customization group. Each bar represents a Customization Group and is divided into Used and Not Used segments.

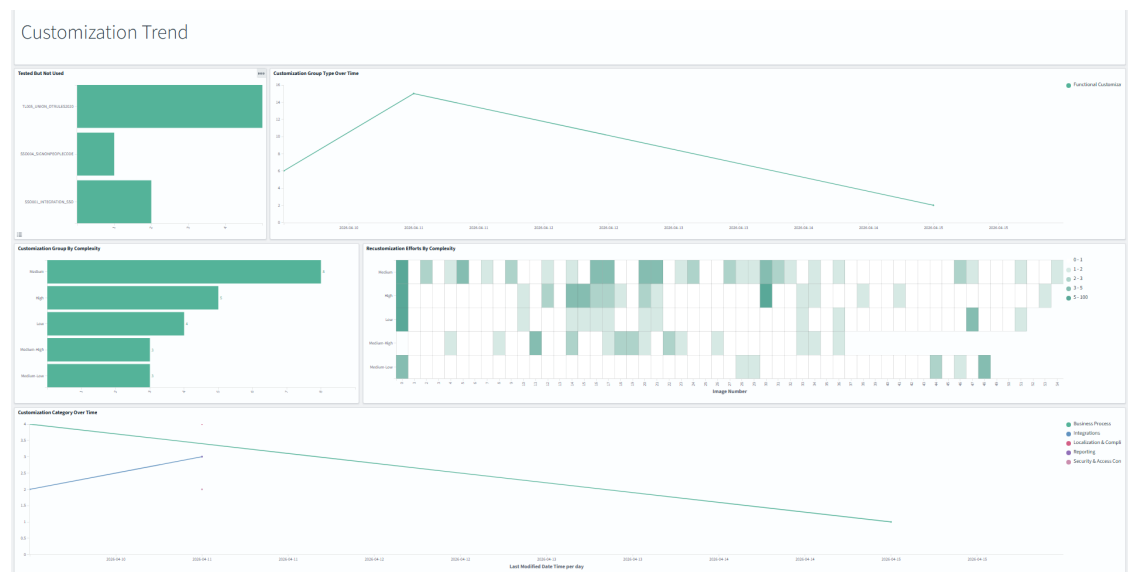
The Used segment indicates the percentage of objects in the group that are referenced in Usage Repository data after usage calculation.

The Not Used segment indicates the percentage of objects in the group that are not referenced in Usage Repository data after usage calculation.

### Customization Trend

Use Customization Trend to review trend analytics for customization groups. The page displays group activity by type, category, and complexity, and provides additional analytics for testing, usage, and recustomization effort.

This example illustrates the fields and controls on the Customization Trend.



The available segments are:

- Tested But Not Used- displays customization groups that have test coverage but do not show usage activity. Use this to identify groups that may require usage validation. A group may appear in this chart if its objects are covered by tests but are not referenced in usage data.
- Customization Group Type Over Time- displays customization group counts by type across the selected date range. Use this to review how group types, such as Functional Customization, change over time.

- **Recustomization Efforts By Complexity-** Displays the number of customization groups assigned to each complexity level. Use this to understand whether the customization inventory is concentrated in low, medium, or high complexity groups. Complexity is a group-level attribute that represents the relative complexity of a customization group. PeopleSoft delivers fixed values from 1 through 5, where 1 indicates low complexity and 5 indicates high complexity. The default value is 3. Users cannot add or modify the delivered complexity values.
- **Customization Category Over Time-** Displays customization group counts by category across the selected date range. Use this to identify functional areas where customization activity is increasing or decreasing.

## List of Customization

This grid displays the list of customizations created.

| My Customization Groups        |                                          |                           |             |          |            |                    |
|--------------------------------|------------------------------------------|---------------------------|-------------|----------|------------|--------------------|
| Customization Group            | Group Description                        | Group Category            | Complexity  | Priority | Owner      | Total Object Count |
| 3 PY004_UNION_PTO2020          | PTO Changes for 2020 Union Contract      | Business Process          | High        | 1        | CBLUM      | 2                  |
| 4 TL005_UNION_OTRULES2020      | Overtime Changes for 2020 Union Contract | Business Process          | Medium      | 2        | SADAMS     | 10                 |
| 5 INT145_INTEGRATION_DTWAREHSE | Integration with Data Warehouse          | Integrations              | Medium      | 3        | NJONES     | 5                  |
| 6 LC187_INDONESIA_PAYROLL      | Payroll Implementation for Indonesia     | Localization & Compliance | Medium-High | 4        | CBLUM      | 2                  |
| 7 LC188_TAIWAN_PAYROLL         | Payroll Implementation for Taiwan        | Localization & Compliance | Medium      | 2        | CBLUM      | 2                  |
| 8 RPT276_FINANCIALSTMT_REPORTS | Financial Statement Reporting            | Reporting                 | Medium      | 1        | ADIAZ      | 3                  |
| 9 SEC020_POSITION_TREE         | Position Tree Security Implementation    | Security & Access Control | High        | 1        | ITENDULKAR | 3                  |

To create customizations, see [Using Manage Groups Page](#) and [Using My Customized Objects Page](#)

# Using Customization Insights

## Understanding Customization Insights

The PeopleTools-delivered Customization Insights dashboard let's you see information about your customizations.

It gives an understanding of which customizations are important to you, the customizations that are no longer required, and so on.

PeopleSoft provides executive level users access to the Customization Insights dashboards from PeopleSoft (PIA).

## Using Customization Insights Dashboard

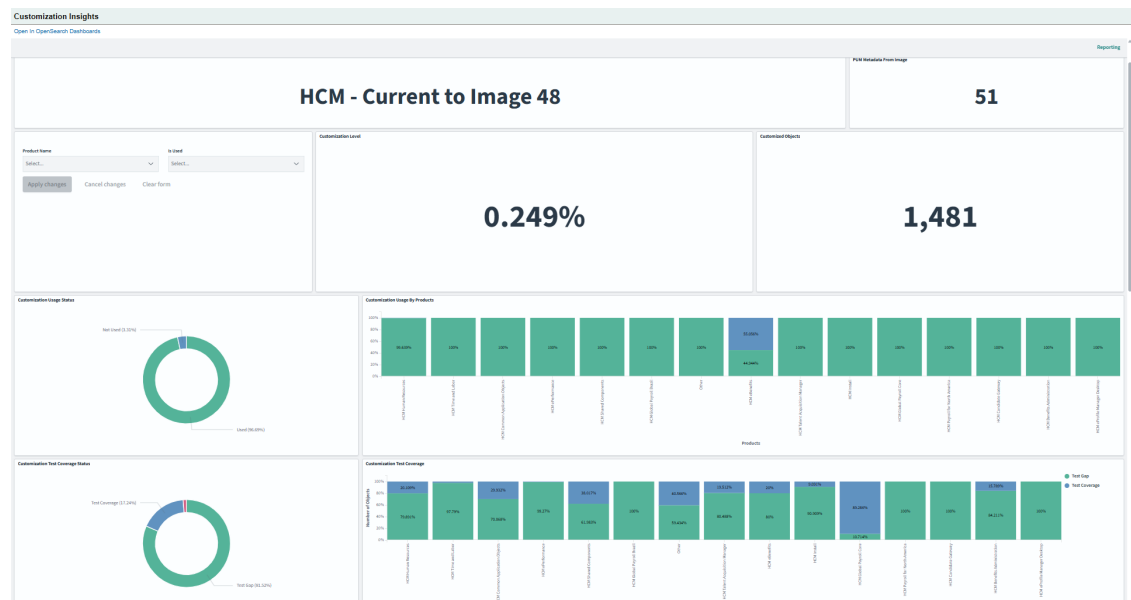
The Customization Insights Dashboard is used by the executive level users.

Navigate to **PeopleTools**, and then **Lifecycle Tools**, and then **Customization Insights Dashboard**.

Only the Customization type customization data is available in the this dashboard as executive level user only need to know about Customizations.

Utilize the available visualizations to assess the level of customizations. Based on this assessment, you can determine the appropriate maintenance activities.

This example illustrates the fields and controls on the Customization Insights Dashboards.



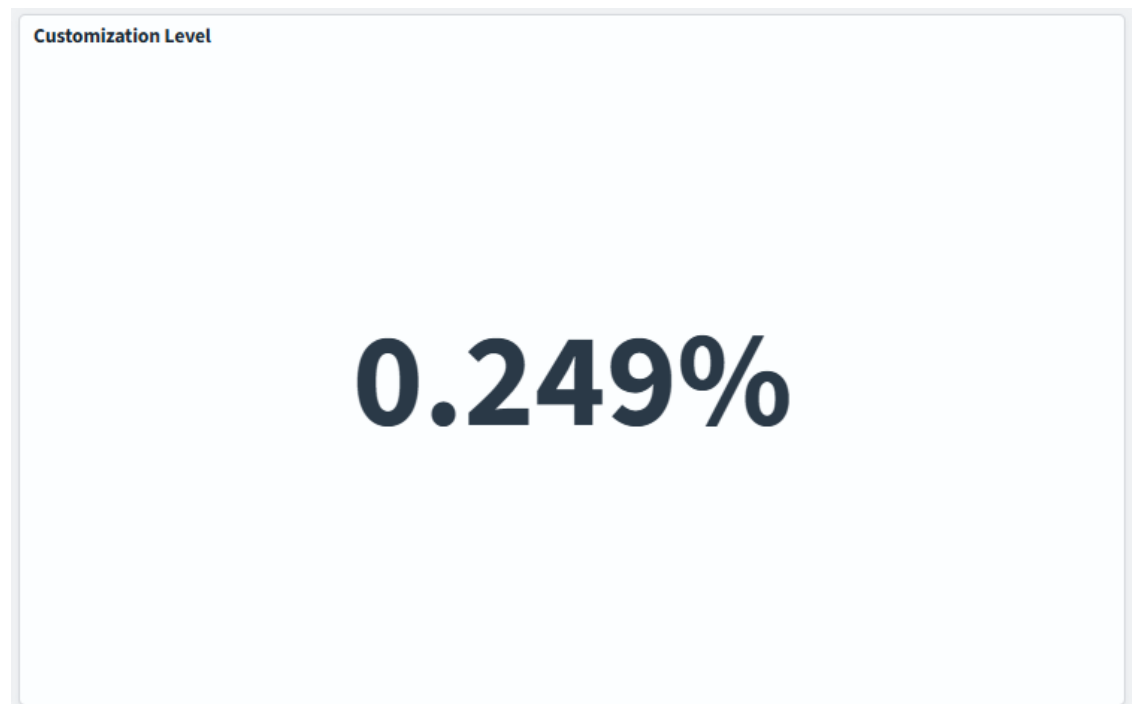
The various visualizations in this dashboard display data based on these filters:

- Product Name- lets you to select products, such as, HCM Benefits or HCM Human Resources.
- Is Used- lets you to filter objects based on their usage. Two options available are: Not Used and Used.

### Customization Level

Use Customization Level to view the level of your customizations.

This example illustrates the fields and controls on the Customization Level visualization.



In this example the Customization percent is 0.249%. This represents the proportion of PeopleSoft-delivered objects that have been modified by the customer.

### Customized Objects

Use Customized Objects to view the count of customized objects.

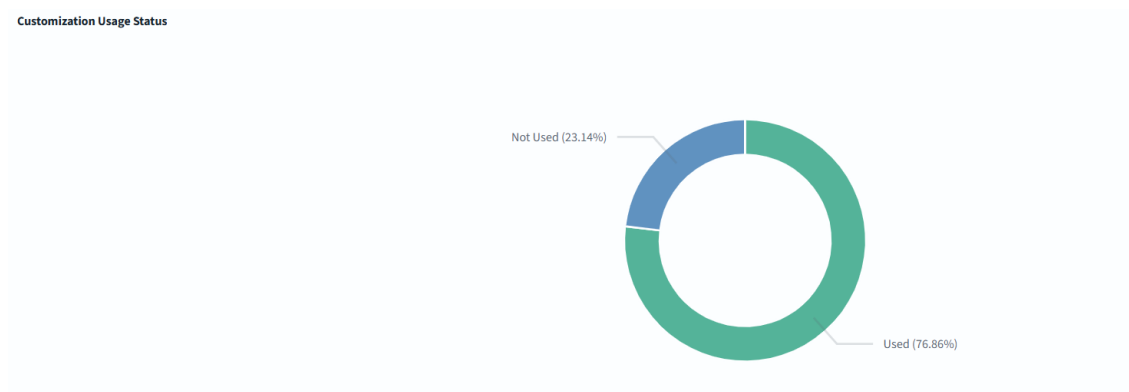
This example illustrates the fields and controls on the Customized Objects visualization.



### Customization Usage Status

Use Customization Usage Status to view the usage of customizations.

This example illustrates the fields and controls on the Customization Usage Status visualization.



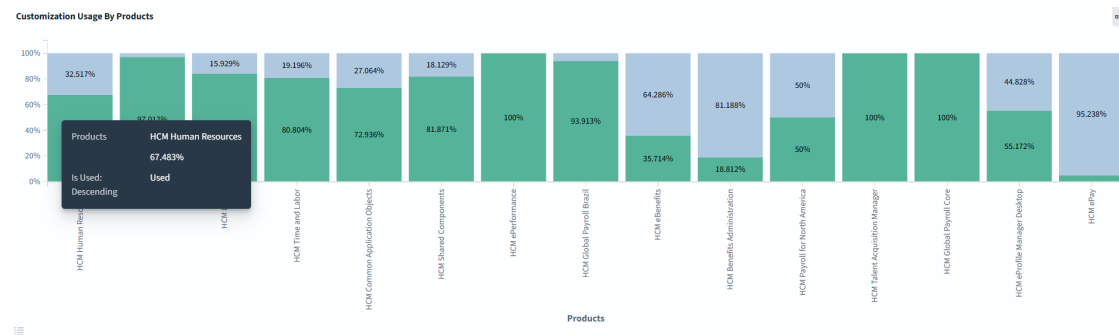
The available segments are:

- Used- indicates the percentage of customizations used in the entire product line.
- Not Used- indicates the percentage of customizations not used in the entire product line.

## Customization Usage by Products

Use Customization Usage by Products to view the percentage of usage of each product.

This example illustrates the fields and controls on the Customization Usage by Products visualization.



The available segments are:

- Green- indicates the percentage of customizations that users have actively used for a specific product.

For example, if users utilize five out of ten HCM eBenefits customizations, then fifty percent of eBenefits customizations are in use, while the remaining fifty percent are unused.

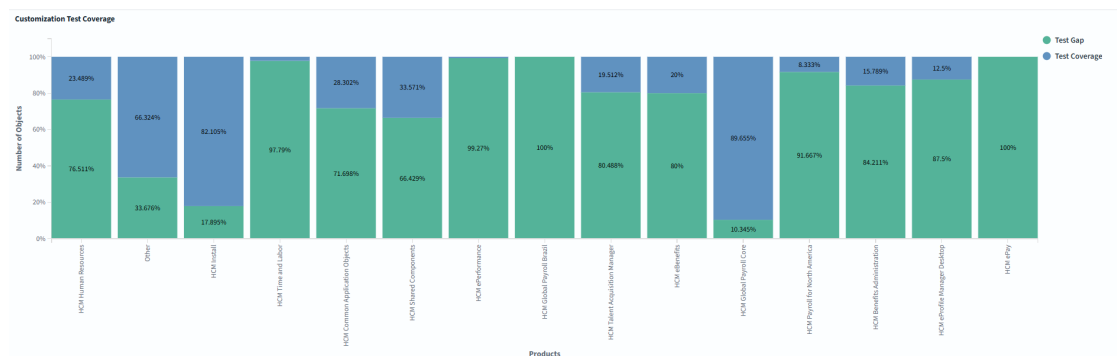
- Blue- indicates the percentage of customization not used by the product.

In this example, both HCM ePerformance and Global Payroll Core utilize all customizations, as indicated by their 100% usage.

## Customization Test Coverage

Use Customization Test Coverage to view the percentage of test coverage across different products.

This example illustrates the fields and controls on the Customization Test Coverage visualization.



The available segments are:

- Green- indicates the percentage of customizations not covered by test.
- Blue- indicates the percentage of customizations covered by tests.

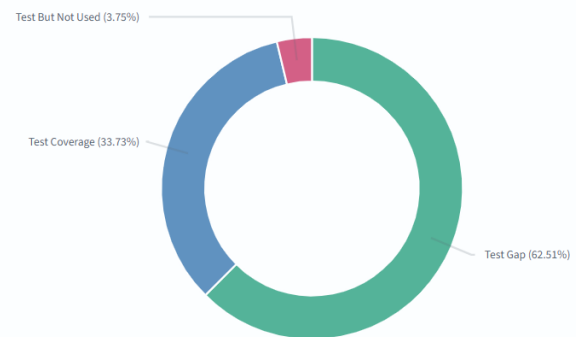
Use this data to improve test coverage of products with high test gaps to mitigate risks of defects and unsupported changes.

### Customization Test Coverage Status

Use Customization Test Coverage Status to view the test coverage of customizations by comparing the presence and usage of customizations between the customer's test and production environments.

This example illustrates the fields and controls on the Customization Test Coverage Status visualization.

Customization Test Coverage Status



The available segments are:

- Test Gap- which is identified by the green color shows the percentage of customizations that have not been covered by any tests.
- Test Coverage- which is identified by the blue color shows the percentage of customizations that are actively covered by the tests.
- Test But Not Used- which is identified by the red color shows that tests exist for a certain percentage of customizations, but these customizations are not currently used in Production environment.

### Customization Over Time

The Customization Over Time analytic tracks the number of customized objects as they are added to the Insights over a time period.

This example illustrates the fields and controls on the Customization Over Time visualization.



The X-axis shows the date or time when customizations are added to the Insights.

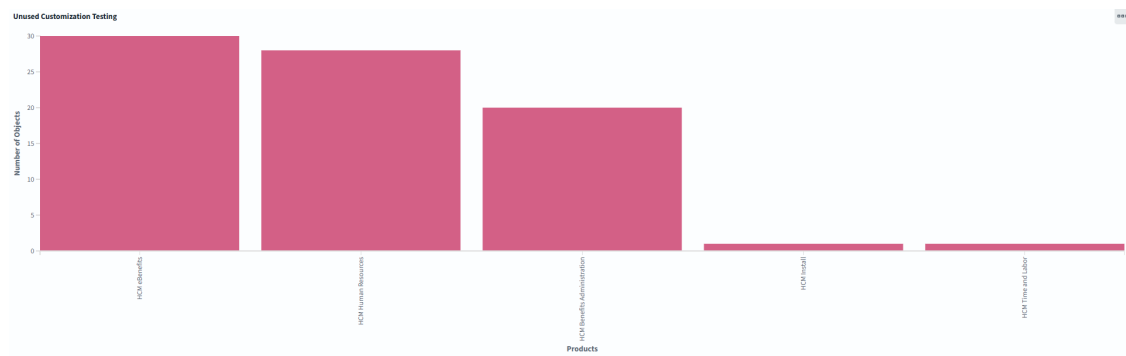
The Y-axis shows the number of customized objects.

This visualization helps you instantly pinpoint when the majority of customizations entered the system. Trends like this are important for understanding system changes, planning for support, or assessing the impact of large deployments.

### Unused Customization Testing

Use Unused Customization Testing to view information on the number of unused customization tests across various products.

This example illustrates the fields and controls on the Unused Customization Testing visualization.



Unused customization tests typically indicate tests that exist for customizations which are not actively being used.

### Unused Customization Testing- Object Details

The Unused Customization Testing- Object Details analytic provides a detailed view of specific customization objects that have associated test cases but are currently not in use.

This example illustrates the fields and controls on the Unused Customization Testing- Object Details visualization.

Unused Customization Testing - Object Details

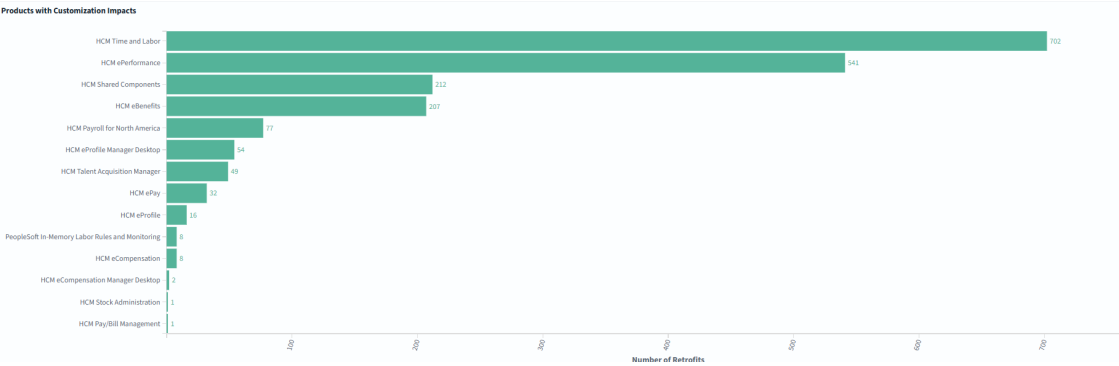
| Object Type | Object Value 1  | Object Value 2 | Object Value 3 | Object Value 4 | Product Name                | Added to Repository        |
|-------------|-----------------|----------------|----------------|----------------|-----------------------------|----------------------------|
| Record      | BAS_STMTCAL_AET | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMTCHRT_WK | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_AC_WRK | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_AET    | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_BENCNT | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_BENRRW | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_BEN_VW | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_BEN_WK | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_DB_VW  | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |
| Record      | BAS_STMT_DEPCNT | No Value       | No Value       | No Value       | HCM Benefits Administration | May 1, 2025 @ 22:40:07.000 |

| Field             | Description                                                                                  |
|-------------------|----------------------------------------------------------------------------------------------|
| Object Type       | The data objects that have associated test cases but not is not being used.                  |
| Object Value 1-4  | Displays the object name and other identifiers.                                              |
| Product Name      | Displays the product with which this object is associated.                                   |
| Add to Repository | Displays the time when the objects and their unused test cases were added to the repository. |

Products with Customization Impacts

Use Products with Customization Impacts to view a breakdown of the number of retrofits or customization impacts for various products.

This example illustrates the fields and controls on the Products with Customization Impacts visualization.



The Y axis represents the products.

The X axis represents the number of retrofits or the instances where customizations have impacted the product.

Object Details

Use Object Details to view more details on the object type used.

This example illustrates the fields and controls on the Object Details visualization.

| Object Details                                                                    |                 |                |                |                |                    |                    |               |                            |
|-----------------------------------------------------------------------------------|-----------------|----------------|----------------|----------------|--------------------|--------------------|---------------|----------------------------|
|  |                 |                |                |                |                    |                    |               |                            |
| Object Type                                                                       | Object Value 1  | Object Value 2 | Object Value 3 | Object Value 4 | Customization Type | Is Used: Ascending | Test Coverage | Last Added to Repository   |
| Record                                                                            | 1099C_CUST_DATA | No Value       | No Value       | No Value       | Custom             | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | 1099_RPT_TMP    | No Value       | No Value       | No Value       | Custom             | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | AAP_TBL         | No Value       | No Value       | No Value       | Customization      | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | AA_SUMM_JPN_VW  | No Value       | No Value       | No Value       | Customization      | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | ABBR_TYPE_LNG   | No Value       | No Value       | No Value       | Customization      | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | ABBR_TYPE_TBL   | No Value       | No Value       | No Value       | Customization      | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | ABSENCE_HIST    | No Value       | No Value       | No Value       | Customization      | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |
| Record                                                                            | ABSENCE_SHP_GBR | No Value       | No Value       | No Value       | Customization      | Used               | Test Coverage | May 1, 2025 @ 22:40:07.000 |

| Field                    | Description                                                                      |
|--------------------------|----------------------------------------------------------------------------------|
| Object Type              | The data objects that have associated test cases but not is not being used.      |
| Object Value 1-4         | Displays the object name and other identifiers.                                  |
| Customization Type       | Displays the customization type to which the object is associated with.          |
| Test Coverage            | Indicates that automated or manual testing includes these objects,               |
| Last Added to Repository | Indicates the time stamp when the object was last added in the asset repository. |

# Defining Change Packages

## Understanding Change Packages

There are four types of Change Packages.

1. Update Package

Update change packages contain updates and enhancements selected by the customer, along with the pre and post requisites. There are multiple ways for customers to select which updates to apply.

See [Defining Update Change Packages](#)

2. Upgrade Package

Upgrade packages are used when a customer upgrades to application 9.2. The Upgrade change package will contain the Application Upgrade template from the current release to 9.2. Upgrades also require a Required for Upgrade package which contains all of the bugs required for upgrade

See [Defining an Upgrade Package](#)

3. Tools Delta Package

Tools Delta change packages are used after a PeopleTools upgrade and contain attributes or objects that were stripped away when the updates were applied in the old release.

See [Creating and Applying Tools Delta Package](#)

4. Translations Delta Package

Translation Delta packages contain languages and translation fixes.

See [Defining Translations Delta Package](#)

## Defining Update Change Packages

The latest PeopleSoft Update Image downloaded from MOS includes the PeopleSoft working database, PeopleTools, applications, managed objects, codeline, and the data and metadata required to use the PeopleSoft Update Manager. The Update Manager PIA interface is used to identify required and desired updates for the change package definition.

The Define Change Package wizard will guide you through the steps to create a change package definition. There are 6 steps:

1. Select Target Database

**Note**

The target database is selected from the Select Target Database folder on the Update Manager Dashboard. This page is only displayed when no target databases have been up loaded.

2. Enter Change Package Name
3. Select Scope
4. Select the updates, objects or criteria

Based on the scope selected in step 3, appropriate page will open to select your updates. If you select *All Updates Not Applied* in step 3, this step is skipped.

5. Review Bugs
6. Done Identifying Bugs

**Dependency Calculator**

When the user transitions from Step 4 to Step 5 the dependency calculator is automatically executed.

- The calculator is a PeopleCode Program.
- If you selected to select by Specific Updates, Updates by Criteria, or Updates by Object Name, the dependency tree is calculated such that bugs that are Already Applied, and the post-requisites of those same bugs are excluded from the package during the calculation process. Unapplied pre-requisites of applied bugs will, however, be included in the calculated result.
- If you selected All Updates Not Yet Installed, the calculator will insert all updates that have not been applied in the selected target environment into the results table.

**Note**

All requisite updates are specific to and calculated based on the target database. If the change package is reused for another database, Change Assistant will perform a check to ensure all requisites exist. If requisites are missing, you will get an error message.

## Define Update Package Wizard Step 1 of 6

Custom change packages are created on to your PUM Source Database.

Navigation:

On to your PUM Source Database, select **PeopleTools**, and then **Lifecycle Tools**, and then **Update Manager**, and then **Update Manager**, and then **Select Target Database**

All environments that were selected as target databases in Change Assistant Wizard and uploaded to the PUM Source will be displayed in the list. This list is also filtered by UserID.

This example illustrates the fields and controls on the Select Target Database.

Select Target Database ^

H92CD640

H92CDTGT

**Note**

The target database information is uploaded to the PUM source database when you select the Upload Target Database Information to PUM Source. See [Uploading Target Database Information](#)

If you only have one database, it is selected by default.

# Define Update Package Wizard Step 2 of 6

Navigation:

Open the Define Change Package folder and select Update Package.

The second step is to enter an update package name.

This example illustrates the fields and controls on the Update Package Step 2 of 6 page. You can find definitions for the fields and controls later on this page.

Update Package

Step 2 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

123456

PreviousNext

Enter Change Package Name

The change package name must be unique for the user-selected target database.

Database

H92CDTGT

PeopleTools Release

8.58.03

Description

Package Name

Action

☒ Create

☐ Edit

Package Name

EXAMPLE

Package Description

example change package

| Field or Control           | Description                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Action</b>              | Select the action. Create is the default.<br>Select Edit if you want to update an existing package definition.                                                                                                                                                                                                                                                                                                               |
| <b>Package Name</b>        | Enter a name for your custom change package. To edit an existing change package, select the Lookup button. The list of change packages that can be edited is restricted as follows: <ul style="list-style-type: none"> <li>• Packages created by the current user.</li> <li>• Packages created for the currently selected target database.</li> <li>• Packages which have been defined but have not been created.</li> </ul> |
| <b>Package Description</b> | Enter a description for the change package.                                                                                                                                                                                                                                                                                                                                                                                  |

Click Next.

If you selected Create and the package name already exists, a message “Exiting package name not permitted in Create action mode (269,259) Enter a new package name to continue.

If you selected Edit, the Change Package Options page is displayed.

### Change Package Options

On the Change Package Options page, you can select whether to edit or replace the change package.

This example illustrates the fields and controls on the Change Package Options page. You can find definitions for the fields and controls later on this page.

The screenshot shows a dialog box titled "Change Package Options". Inside the dialog, there is a message: "The selected package definition 'TL\_ENH' already exists." Below the message are three buttons: "Edit", "Replace", and "Cancel". A "Help" link is visible in the top right corner of the dialog area.

| Field or Control | Description                                                                                                 |
|------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Edit</b>      | Select this option to edit the existing change package. The search results previously entered are retained. |
| <b>Replace</b>   | Select this option to replace the existing change package.                                                  |

| Field or Control | Description                                                                |
|------------------|----------------------------------------------------------------------------|
| Cancel           | Select this option to cancel and select a new name for the change package. |

## Define Update Package Wizard Step 3 of 6

The third step is to select the scope to use for searching for updates.

This example illustrates the fields and controls on the Update Package Step 3 of 6 page. You can find definitions for the fields and controls later on this page.

Update Package

Step 3 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1

2

3

4

5

6

Previous

Next

Select Search Method

Database

H92CDTGT

PeopleTools Release

8.58.03

Description

Package Name

EXAMPLE

Update Manager Options

☒ Standard System Search Criteria

☐ Previously Defined Search Criteria

☐ All Other Search Criteria

Note

Regardless of the option you choose, all available and not yet applied requisite updates for the bugs selected will be included in the change package.

| Field or Control                   | Description                                             |
|------------------------------------|---------------------------------------------------------|
| Standard System Search Criteria    | Select this option to perform a simple standard search. |
| Previously Defined Search Criteria | Select this option to use a saved search.               |
| All Other Search Criteria          | Select this option to perform a selective search        |

## Selecting Standard System Search

Select the Standard System Search radio button and click Next.

This example illustrates the fields and controls on the Standard System Search Criteria. You can find definitions for the fields and controls later on this page.

Update Package

Step 4 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1

2

3

4

5

6

Previous

Next

Select a method to search for BUGs and create a Change package

Database

H92CDTGT

PeopleTools Release

8.58.03

Description

Package Name

EXAMPLE

Standard System Search Criteria

1-6 of 6

View All

|                                  | Search Description                                    | Details |
|----------------------------------|-------------------------------------------------------|---------|
| <input checked="" type="radio"/> | All Unapplied Updates for Installed Products          |         |
| <input type="radio"/>            | All Critical Unapplied Updates for Installed Products |         |
| <input type="radio"/>            | All Critical Updates Not Applied                      |         |
| <input type="radio"/>            | All Tax Updates Not Applied                           |         |
| <input type="radio"/>            | All True Requisites Not Applied                       |         |
| <input type="radio"/>            | All Updates Not Applied                               |         |

| Field or Control                                      | Description                                                                                                 |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| All Unapplied Updates for Installed Products          | Change package containing all updates for all installed products not applied on target database.            |
| All Critical Unapplied Updates for Installed Products | Change package containing all severity 1 updates for all installed products not applied on target database. |
| All Critical Updates Not Applied                      | Change package containing all severity 1 updates not applied on target database.                            |
| All Tax Updates Not Applied                           | Change package containing all tax updates not applied on target database.                                   |
| All True Requisites Not Applied                       | Change package containing all true requisites updates not applied on target database.                       |
| All Updates Not Applied                               | Change package containing all updates not applied on target database.                                       |

Selecting Previously Defined Search Criteria

Select the Previously Defined Search Criteria radio button and click Next.

This example illustrates the fields and controls on the Previously Defined Search Criteria. You can find definitions for the fields and controls later on this page.

Update Package

Step 4 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1

2

3

4

5

6

Previous

Next

Select a method to search for BUGs and create a Change package

Database

H92CDTGT

PeopleTools Release

8.58.03

Description

Package Name

EXAMPLE

Previously Defined Search Criteria

1-4 of 4

View All

|                                  | Search Name | Search Description |
|----------------------------------|-------------|--------------------|
| <input checked="" type="radio"/> | DEMO        | DEMO               |
| <input type="radio"/>            | PKG1        | PKG1               |
| <input type="radio"/>            | PKG2        | PKG2               |
| <input type="radio"/>            | TRUE        | TRUE               |

Customer saved searches will be displayed. Select the saved search to use for the new update package.

Selecting All Other Search Criteria

Select the All Other Search Criteria radio button and click Next.

This example illustrates the fields and controls on the All Other Search Criteria. You can find definitions for the fields and controls later on this page.

Update Package

Step 4 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1

2

3

4

5

6

Previous

Next

Select a method to search for BUGs and create a Change package

Database

H92CDTGT

PeopleTools Release

8.58.03

Description

Package Name

DEMO

Search Options

True Post Requisites

New Features

Translations Only

Tax Updates

Specific Bugs

Specific Objects

Prod/Severity/Image

Other Criteria

[Advanced Options](#)

The search process is iterative. Once you have selected bugs into the search results grid, you can select another search option and add additional bugs to the search result grid. Search and selection can be performed in any order, the results are recalculated with each search.

| Field or Control            | Description                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>True Post Requisites</b> | <p>When you select this option, the Search by True Post Requisites page is displayed. Users can use the Search button to display the post requisite bugs. Users have the option to select or deselect the bugs in the grid.</p> <p>If there are no unapplied true requisites for the target database, this option will be grayed out and not selectable.</p>     |
| <b>New Features</b>         | <p>Select this option to search for new features.</p> <p><b>Note:</b> This option is equivalent to using the Advanced Search option in PeopleTools 8.54 and selecting the tracking group Enhancement with the value Enhancement.</p>                                                                                                                             |
| <b>Translations Only</b>    | <p>When you select this option you see a field that allows you to select a language.</p> <p>If the target database is English Only, this link will be greyed out and not selectable.</p>                                                                                                                                                                         |
| <b>Tax Updates</b>          | <p>Select this option to search for tax updates.</p> <p>If there are no unapplied tax updates for the target database, this link will be greyed out and not selectable.</p>                                                                                                                                                                                      |
| <b>Specific Bugs</b>        | <p>Select this option to search for updates related to specific Bug IDs.</p>                                                                                                                                                                                                                                                                                     |
| <b>Specific Objects</b>     | <p>Select this option to search for updates related to specific PeopleSoft managed objects.</p>                                                                                                                                                                                                                                                                  |
| <b>Prod/Severity/Image</b>  | <p>Select this option to search for updates by various criteria such as Product, Severity, or Image.</p>                                                                                                                                                                                                                                                         |
| <b>Other Criteria</b>       | <p>Other criteria covers any tracking groups for the application that are not covered in another search, such Legislative/Regulatory, Multi-instance, or PeopleTools Compatibility.</p> <p>Tracking groups will differ by product.</p> <p>If there are no unapplied other criteria for the target database, this link will be greyed out and not selectable.</p> |
| <b>Advanced Options</b>     | <p>Select this link to set the dependency calculation.</p> <p>See <a href="#">Using Advanced Options Page</a></p>                                                                                                                                                                                                                                                |

## Selecting Specific Bugs

Select the Specific Bugs link.

**Note**

Specific bugs can be combined with bugs using any of the other search criteria options.

This example illustrates the fields and controls on the Search by Bugs page. You can find definitions for the fields and controls later on this page.

Search by Bugs

Use this search page to add specific Bugs to your change package

Search Filters

Enter Multiple Bugs

Select Bugs

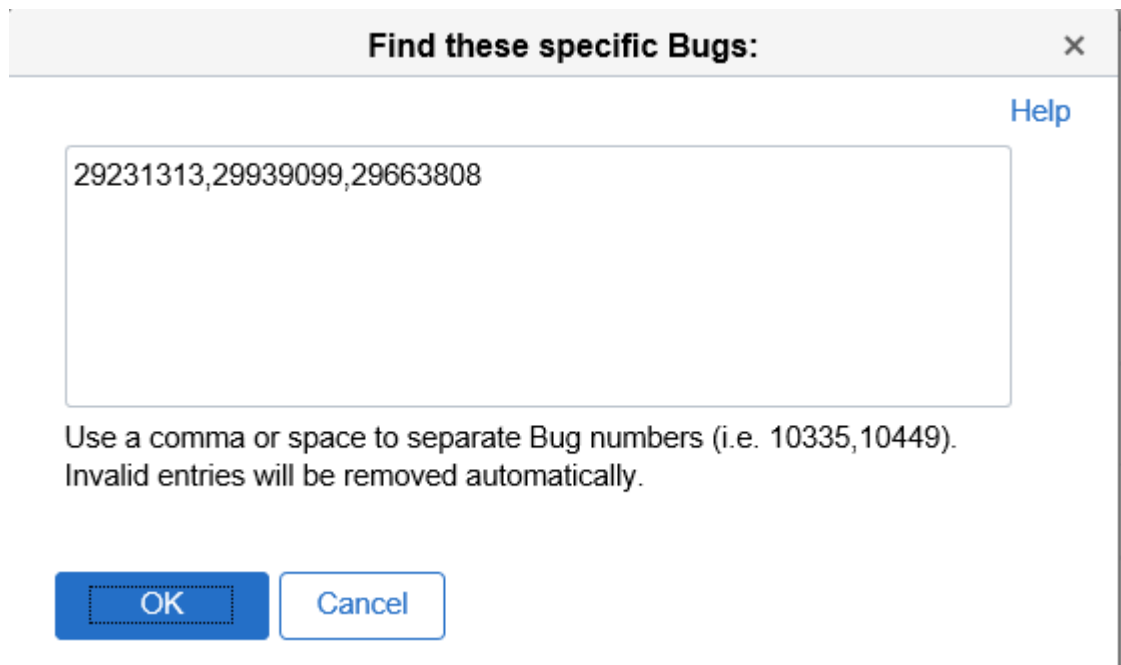
| BUG Number           | Product | Subject | Applied | Custom Impact | Test Exists | Image Number | Details |   |   |
|----------------------|---------|---------|---------|---------------|-------------|--------------|---------|---|---|
| <input type="text"/> |         |         |         |               |             | 0            |         | + | - |

OK

Cancel

| Field or Control           | Description                                                                                                               |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Enter Multiple Bug Numbers | Use this link to open a model window where you can enter the specific bugs. Use a comma or space to separate Bug numbers. |
| Bug Number                 | Use the lookup icon to select specific bugs. Add additional rows as needed.                                               |
| Product                    | The product from the bug will be displayed as read only.                                                                  |
| Subject                    | The subject from the bug will be displayed as read only.                                                                  |

This example illustrates the fields and controls on the Find these specific Bugs page that opens when Enter Multiple Bug Numbers is selected. You can find definitions for the fields and controls later on this page.



**Find these specific Bugs:** ×

[Help](#)

29231313,29939099,29663808

Use a comma or space to separate Bug numbers (i.e. 10335,10449).  
Invalid entries will be removed automatically.

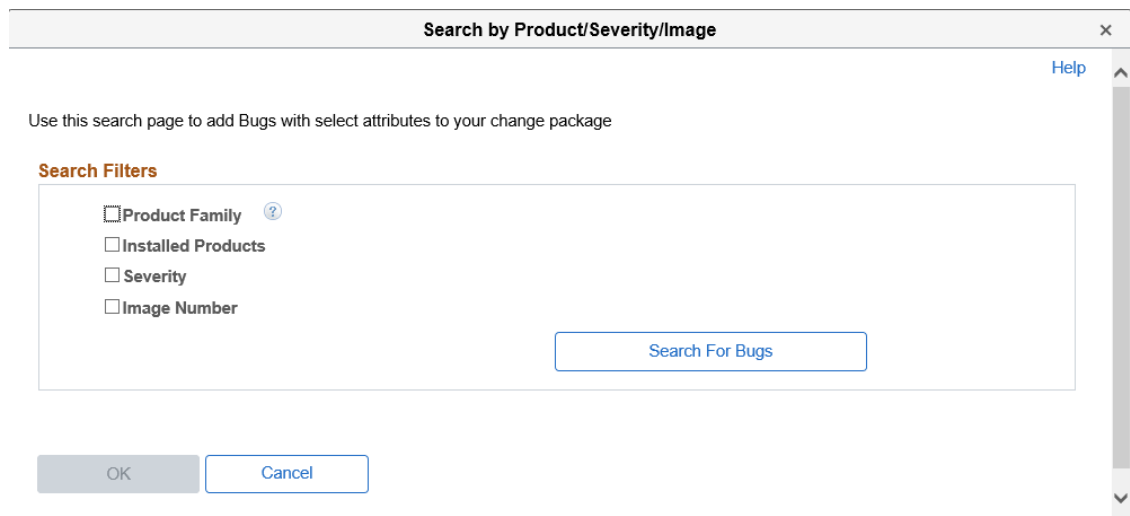
**OK** **Cancel**

Once you have selected the updates, click Next.

## Selecting Updates by Prod/Severity/Image

Select the Prod/Severity/Image link.

This example illustrates the fields and controls on the Search by Product/Severity/Image page. You can find definitions for the fields and controls later on this page.



**Search by Product/Severity/Image** ×

[Help](#)

Use this search page to add Bugs with select attributes to your change package

**Search Filters**

☐ Product Family ?

☐ Installed Products

☐ Severity

☐ Image Number

**Search For Bugs**

**OK** **Cancel**

The **Search by Product/Severity/Image** page, enables you to search for updates by:

- **Product Family**  
Allows you to select one or more values.

A Product Family is a grouping of products. This grouping is defined by PeopleSoft, and is intended to align with the “Bundle” groupings in non-PUM enabled application updates.

### Note

Product Family = PNA will select all fixes for Payroll North America (equivalent to a PNA Tax Update in prior releases),

Product Family = Global Payroll will select all fixes for Global Payroll products (equivalent to a GP Update Bundle in prior releases).

- **Installed Products**

You can select if you want to include related components and subcomponents and then select the installed products to search. A related component or subcomponent is a defined relationship between products. This relationship is defined by PeopleSoft, and is intended to assist the search experience by including the related products automatically when a given product is selected.

- **Severity**

Select the severity:

- 1 - Complete loss of service
- 2 - Severe loss of service
- 3 - Minimal loss of service

- **Image Number**

When you select this option you see drop-down lists for From PI and To PI. Enter a range of image numbers to include in the search.

The minimum allowed value is image 1.

This example illustrates the fields and controls on the Example Search by Severity. You can find definitions for the fields and controls later on this page.

Search by Product/Severity/Image

Use this search page to add Bugs with select attributes to your change package

Search Filters

☐ Product Family
 ☐ Installed Products
 ☒ Severity
 

1 - Complete Loss of Service

☐ Image Number

Search For Bugs

☐ Show Already Applied Updates

Select Bugs

1-10 of 11

View All

|                                     | BUG Number | Product | Subject                                                                | Applied | True Post Req | Custom Impact | Test Exists | Image Number | Details |
|-------------------------------------|------------|---------|------------------------------------------------------------------------|---------|---------------|---------------|-------------|--------------|---------|
| <input checked="" type="checkbox"/> | 31480614   | EC      | PROCESS HCSC_TREEBLD RUNS TO NO SUCCESS DUE TO UNIQUE CONSTRAINT ERROR |         |               | No Impact     |             | 35           |         |
| <input checked="" type="checkbox"/> | 29944401   | EY      | PAYCHECK MODELER: DISABLE EDIT WHEN TAX JURISDICTION IS BLANK          |         |               | No Impact     |             | 35           |         |

Change Assistant and Update Manager  
G47469-01  
Copyright © 1988, 2026, Oracle and/or its affiliates.

July 20, 2026  
Page 11 of 22

| Field or Control                    | Description                                                                                                                                                                                                                                                              |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Show Already Applied Updates</b> | Select this check box to include already applied updates in the result set. If this check box is selected, a visual indicator will appear in the Applied column.                                                                                                         |
| <b>Bug Number</b>                   | Lists the bug numbers returned by the search.                                                                                                                                                                                                                            |
| <b>Subject</b>                      | Displays the subject for the bug.                                                                                                                                                                                                                                        |
| <b>Applied</b>                      | A visual indicator will be displayed, if the Show Already Applied check box is selected and the bug has already be applied to the target database.<br>This bug is not included in the change package definition.                                                         |
| <b>True Post Req</b>                | True post-requisite updates will be sorted to the top of the bug list. A visual indicator is displayed to identify the bug as true post requisite.<br>All bugs discovered based on the Post Requisites for (Select) Previously Applied bugs will be listed as suggested. |
| <b>Custom Impact</b>                | Indicates whether or not the bug has an impact on an object stored in the Customization Repository.<br>If the Customization Calculation has not been run this column will display Run Calc.<br>See <a href="#">Using Customization Repository</a>                        |
| <b>Test Exists</b>                  | A visual indicator will be displayed if the bug has an impact on tests defining in the Test Repository.<br>See <a href="#">Using the Test Repository</a>                                                                                                                 |
| <b>Image</b>                        | Image number that contains the bug.                                                                                                                                                                                                                                      |
| <b>Details</b>                      | Click this icon to display the bug details.                                                                                                                                                                                                                              |

## Selecting Specific Objects

The **Specific Objects** link, enables you to search for updates related to specific traditional or ADS managed objects. Select an object type and enter an object name. For example, you can search for the PERSONNEL record and see all of that record's related fixes.

To search for updates related to specific PeopleSoft objects:

1. Select an object type from the drop-down list.
2. Enter an object name.  
For example, you can search for the records that start with JOB and see all of that records that start with JOB.
3. Optionally, deselect the Hide Objects of Applied Bugs if you want to see objects matching your criteria that have already been applied.
4. Click Find.

After clicking the Find button, the grid displays your query output; in this instance, the specific PeopleSoft objects related to your search criteria.

5. Select the check box next to each object in the result grid that you want to search for.
6. Click the Search for Bugs button.
7. By default all bugs returned in the grid will be selected.

You can manually deselect a bug or use the Clear All button to clear all the selections and then manually select the bugs to include.

8. Optionally, select the Show Already Applied Updates check box to include bugs that have already been applied to the target database or environment.

This example illustrates the fields and controls on the Search by Objects page. You can find definitions for the fields and controls later on this page.

Search by Objects

Use this search page to add Bugs that update specific Traditional or ADS Managed Objects to your change package

**Search Filters**

Object Type: Access Group (dropdown)

Object Name: (text input) Find

☒ Hide Objects of Applied Bugs

**Select an Object**

| Object Value 1                                     | Object Value 2 | Object Value 3 | Object Value 4 |
|----------------------------------------------------|----------------|----------------|----------------|
| <input checked="" type="checkbox"/> SEARCH_TREE_HR |                |                |                |

Search For Bugs

☐ Show Already Applied Updates

**Select Bugs**

| BUG Number                                   | Product | Subject                                                      | Applied | True Post Req | Custom Impact | Test Exists | Image Number | Details |
|----------------------------------------------|---------|--------------------------------------------------------------|---------|---------------|---------------|-------------|--------------|---------|
| <input checked="" type="checkbox"/> 31380753 | HR      | COMPENSATION SEARCH DEFINITIONS CHANGES - RECORDS AND FIELDS |         |               | No Impact     |             | 35           |         |

Deselect Applied Bugs Select All Clear All OK Cancel

## Selecting True Post Requisites

Select the True Post Requisites link.

True Post Requisites are those that are defined by PeopleSoft, as being critical to correct or complete a previously posted fix.

This example illustrates the fields and controls on the Search by True Post Requisites page.

Search by True Post Requisites

Help

Use this search page to add True Post Requisite Bugs to your change package

Search Filters

☒ True Post-Requisites for (Select) Previously Applied Fixes

Search For Bugs

☐ Show Already Applied Updates

Select Bugs

1-3 of 3

View All

| BUG Number                                   | Product | Subject                                                                        | Applied | True Post Req | Custom Impact | Test Exists | Image Number | Details |
|----------------------------------------------|---------|--------------------------------------------------------------------------------|---------|---------------|---------------|-------------|--------------|---------|
| <input checked="" type="checkbox"/> 32287760 | EPO     | EPRO_FLD:UOW#132237 MISSING PRE-REQ DOWN DEPENDENCY ISSUE                      |         |               | No Impact     |             | 39           |         |
| <input checked="" type="checkbox"/> 32410451 | EPO     | EPRO_FLD:PI37 ERROR WHEN PV_MOB_855_CHEKOUT IS LOADED WITHOUT PV_KK_EXCPTN_SCF |         |               | No Impact     |             | 39           |         |
| <input checked="" type="checkbox"/> 32098380 | GL      | ENH: CHANGES TO SIMPLE JOURNAL TO SUPPORT JOURNAL SOURCE SECURITY SECOND PHASE |         |               | No Impact     |             | 39           |         |

Deselect Applied Bugs

Select All

Clear All

OK

Cancel

## Selecting Tax Updates

Select the Tax Updates link.

This example illustrates the fields and controls on the Tax Updates Search page. You can find definitions for the fields and controls later on this page.

Tax Updates Search

Help

Add Tax Updates to any other Search Criteria

Search Filters

☐ Tax or Regulatory Update

☐ Image Number

Search For Bugs

OK

Cancel

| Field or Control         | Description                                                                                   |
|--------------------------|-----------------------------------------------------------------------------------------------|
| Tax or Regulatory Update | When you select this option you see a drop-down list for Tax or Regulatory updates available. |

| Field or Control    | Description                                                                                                                         |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>Image Number</b> | When you select this option you see drop-down lists for From PI and To PI. Enter a range of image numbers to include in the search. |

## Selecting New Features

Select the New Features link.

This example illustrates the fields and controls on the New Features Search page. You can find definitions for the fields and controls later on this page.

New Features Search

[Help](#)

Add New Features to any other Search Criteria

**Search Filters**

☒ Installed Products

Select one or more Values

41-45 of 45

[View All](#)

|                                     | Product Name                                        | Product |
|-------------------------------------|-----------------------------------------------------|---------|
| <input type="checkbox"/>            | PeopleSoft Enterprise HCM Payroll for North America | PY      |
| <input type="checkbox"/>            | PeopleSoft Enterprise HCM Shared Components         | SC      |
| <input type="checkbox"/>            | PeopleSoft Enterprise HCM Succession Planning       | SPN     |
| <input type="checkbox"/>            | PeopleSoft Enterprise HCM Stock Administration      | ST      |
| <input checked="" type="checkbox"/> | PeopleSoft Enterprise HCM Time and Labor            | TL      |

☐ Image Number

[Search For Bugs](#)

☐ Show Already Applied Updates

**Select Bugs** [?](#)

1-4 of 4

[View All](#)

|                                     | BUG Number | Product | Subject                                             | Applied | True Post Req | Custom Impact | Test Exists | Image Number | Details                 |
|-------------------------------------|------------|---------|-----------------------------------------------------|---------|---------------|---------------|-------------|--------------|-------------------------|
| <input checked="" type="checkbox"/> | 31359004   | BA      | FLUID BENEFITS ENROLLMENT PREVIEW STATEMENT UPDATES |         |               | No Impact     |             | 35           | <a href="#">Details</a> |
| <input checked="" type="checkbox"/> | 31363746   | TL      | FLUID REPORTED TIME TOTAL BY UNITS: MAIN FEATURE    |         |               | No Impact     |             | 35           | <a href="#">Details</a> |

There are 2 filter options to assist in the search for new features, Installed products and Image Number. These filters are optional and if you click Search for Bugs with no filters, all matching rows will be returned.

| Field or Control          | Description                                                                                                                         |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>Installed Products</b> | When you select this checkbox, the installed products are displayed and available to select.                                        |
| <b>Image Number</b>       | When you select this option you see drop-down lists for From PI and To PI. Enter a range of image numbers to include in the search. |

# Selecting Other Criteria

Other Criteria allows you to search by tracking group and image. Tracking Groups are defined by PeopleSoft on an as required basis in order to facilitate the search for fixes of a specific, often functional, type. Tracking groups will differ by product.

Select the Other Criteria link.

This example illustrates the fields and controls on the Search by Criteria page. You can find definitions for the fields and controls later on this page.

Search by Criteria

Use this search page to add Bugs with select Tracking Group attributes to your change package

Search Filters

☒ Tracking Group

Name

Legislative/Regulatory

Value

Affordable Care Act

☐ Image Number

Search For Bugs

☐ Show Already Applied Updates

Select Bugs

1-3 of 3

View All

| BUG Number                          | Product  | Subject | Applied                                                                | True Post Req | Custom Impact | Test Exists | Image Number | Details |
|-------------------------------------|----------|---------|------------------------------------------------------------------------|---------------|---------------|-------------|--------------|---------|
| <input checked="" type="checkbox"/> | 30837987 | HR      | HCA ACA MERGE WITH PARTICIPANT LIST NO MATCHING BUFFER FOUND (15,26)   |               | No Impact     |             | 35           |         |
| <input checked="" type="checkbox"/> | 30884665 | HR      | HCM ACA XML FILES FOR COMPANY NAME CAN CONTAIN SPECIAL CHARACTERS      |               | No Impact     |             | 35           |         |
| <input checked="" type="checkbox"/> | 31070567 | HR      | ACA: INACCURATE ACA MANIFEST FILE WHEN REPLACING ONE OF MULTIPLE FILES |               | No Impact     |             | 35           |         |

| Field or Control | Description                               |
|------------------|-------------------------------------------|
| Tracking Group   | Select the Tracking Group name and value. |
| Image Number     | Select the Image Numbers to search.       |

# Using Advanced Options Page

Use this page to set the dependency calculation. The package dependency calculation can optionally include or exclude the post requisites of fixes that have previously been applied to your target database

This example illustrates the fields and controls on the Advanced Options page. You can find definitions for the fields and controls later on this page.

Advanced Options

Help

Dependency Calculation ?

Include Post Requisites of Already Applied Bug Fixes

☐ Yes ☒ No

OK

Cancel

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes              | <div>Include Post Requisites of Already Applied Bug Fixes</div> <div>The full Dependency Tree is calculated prior to checking whether bug fixes included in the calculation have previously been applied to your target. The resulting package will include the Post Requisites of Already Applied bug fixes, but not the Already Applied bug fixes or their pre-requisites. Selecting this option will generally result in a larger change package being created, but this may reduce the chances of missing a fix.</div>            |
| No               | <div>Exclude Post Requisites of Already Applied Bug Fixes (default)</div> <div>The Dependency Tree is calculated such that bugs that are Already Applied are removed during the calculation process, and as a result the resulting package will not include the Post Requisites of the Already Applied bug fixes, nor the Already Applied bug fixes or their prerequisites. Selecting this option will generally result in a smaller change package being created, but this may increase the chances of missing a required fix.</div> |

## Using the Selection Grid

Regardless of the search option selected, the search results will always be displayed in the selection grid at the bottom of the search page.

This example illustrates the fields and controls on the List of Updates grid. You can find definitions for the fields and controls later on this page.

## List of Updates ⓘ

| Select                              | BUG Number | Product | Subject                                                                        | Applied | True Post Req | Custom Impact | Test Exists | Image Number | Details                                                                             |
|-------------------------------------|------------|---------|--------------------------------------------------------------------------------|---------|---------------|---------------|-------------|--------------|-------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | 31212233   | GA      | DELIVER MISSED DUTCH TRANSLATION FIX LEAVE DONATION PROCESSING PAGE            |         |               | No Impact     |             | 35           |  |
| <input checked="" type="checkbox"/> | 31023188   | GA      | SQL ERROR WHEN CLICK ON THE VIEW ELIGIBILITY DETAILS LINK ABSENCE REQUEST PAGE |         |               | No Impact     |             | 35           |  |
| <input checked="" type="checkbox"/> | 30995137   | GA      | PEOPLECODE ERROR ON REQUEST ABSENCE PAGE                                       |         |               | Included      |             | 35           |  |
| <input checked="" type="checkbox"/> | 31370833   | GA      | POTENTIAL SECURITY VULNERABILITY                                               |         |               | No Impact     |             | 35           |  |
| <input checked="" type="checkbox"/> | 31326723   | GA      | REQUEST ABSENCE PAGE GETTING ERROR IN CLOUD DB.                                |         |               | Included      |             | 35           |  |

| Field or Control                    | Description                                                                                                                                                                                                                                                                  |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Show Already Applied Updates</b> | Select this check box to include already applied updates in the result set. If this check box is selected, a visual indicator will appear in the Applied column.                                                                                                             |
| <b>Bug Number</b>                   | Lists the bug numbers returned by the search.                                                                                                                                                                                                                                |
| <b>Subject</b>                      | Displays the subject for the bug.                                                                                                                                                                                                                                            |
| <b>Applied</b>                      | A visual indicator will be displayed, if the Show Already Applied check box is selected and the bug has already be applied to the target database.<br><br>This bug is not included in the change package definition.                                                         |
| <b>True Post Req</b>                | True post-requisite updates will be sorted to the top of the bug list. A visual indicator is displayed to identify the bug as true post requisite.<br><br>All bugs discovered based on the Post Requisites for (Select) Previously Applied bugs will be listed as suggested. |
| <b>Custom Impact</b>                | Indicates whether or not the bug has an impact on an object stored in the Customization Repository.<br><br>See <a href="#">Using Customization Repository</a>                                                                                                                |
| <b>Test Exists</b>                  | A visual indicator will be displayed if there is a test name in the Test Repository corresponding to an object in the bug.<br><br>See <a href="#">Using the Test Repository</a>                                                                                              |
| <b>Details</b>                      | Click this icon to display the bug details.                                                                                                                                                                                                                                  |

## Define Update Package Wizard Step 5 of 6

The fifth step is to review the results of the dependency calculation. This page will display all of the updates selected, as well as all dependent updates. Any updates that include PeopleTools hard dependencies will be excluded from the change package and listed in the Excluded Tools Dependent Bug grid.

**Note**

This page is read-only. In order to modify the results, the user must click *Previous* to return to the previous page in the Wizard.

This example illustrates the fields and controls on the Update Package Step 5 of 6 page. You can find definitions for the fields and controls later on this page.

Update Package

Step 5 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

123456

PreviousNext

Review Bugs

Review bugs to be included in the package. Click on Next to create Change Package.

Database

H92CDTGT

PeopleTools Release

8.58.03

Description

Package Name

EXAMPLE

Included Bug Fixes

1-10 of 21

View All

| BUG Number | Product | Subject                                                                          | User Selected | True Post Req | Custom Impact | Test Exists | Image Number | Details |
|------------|---------|----------------------------------------------------------------------------------|---------------|---------------|---------------|-------------|--------------|---------|
| 31438986   | GP      | TRANSLATED VERSION OF BUG 31032824 FLUID NAVIGATION: GLOBAL PAYROLL DASHBOARD -  |               |               | No Impact     |             | 35           |         |
| 31438802   | GP      | TRANSLATED VERSION OF BUG 30989439 FLUID NAVIGATION: GLOBAL PAYROLL DASHBOARD -  |               |               | No Impact     |             | 35           |         |
| 31438404   | GP      | TRANSLATED VERSION OF BUG 30989474 FLUID NAVIGATION: GLOBAL PAYROLL DASHBOARD -  |               |               | No Impact     |             | 35           |         |
| 31438209   | GP      | TRANSLATED VERSION OF BUG 30911271 FLUID NAVIGATION: GLOBAL PAYROLL DASHBOARD    |               |               | No Impact     |             | 35           |         |
| 31414239   | GA      | TRANSLATED VERSION OF BUG 30921494 ABSENCE CHATBOT - NEW MESSAGE CATALOG SET 174 |               |               | No Impact     |             | 35           |         |
| 31319904   | GP      | TRANSLATED VERSION OF BUG 30535645 MOBILE PAYSIP MESSAGE FEATURE - RULES CHANGE  |               |               | No Impact     |             | 35           |         |
| 29758239   | GP      | BANKING PAGE FILTER BUTTON IS NOT ACTIVATED WHEN FILTERS ARE APPLIED             |               |               | No Impact     |             | 35           |         |
| 31419204   | GP      | MSS: GPCORE - PAYROLL PROCESS IS RUNNING TO NO SUCCESS                           |               |               | No Impact     |             | 35           |         |
| 31212233   | GA      | DELIVER MISSED DUTCH TRANSLATION FIX LEAVE DONATION PROCESSING PAGE              |               |               | No Impact     |             | 35           |         |
| 30798456   | GP      | PAYSIP PAGE FILTER BUTTON IS NOT ACTIVATED WHEN FILTERS ARE APPLIED              |               |               | No Impact     |             | 35           |         |

| Field or Control | Description                                                                                                                                                   |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bug Number       | All of the bug numbers that will be included in the change package are listed.                                                                                |
| Product          | The PeopleSoft product impacted.                                                                                                                              |
| Subject          | Displays the subject for the bug.                                                                                                                             |
| User Selected    | If the bug number was selected in Step 4, this column will contain a check. Updates that do not have a check are required for the selected updates.           |
| Applied          | If the bug has already been applied to your database, this column be checked.<br><b>Note:</b> Applied bugs are not included in the change package definition. |
| True Post Req    | Icon is displayed to indicate the bug type.                                                                                                                   |
| Subject          | Bug subject is displayed                                                                                                                                      |
| Image Number     | Image where the bug was fixed.                                                                                                                                |

| Field or Control                                                                  | Description                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Custom Impact</b>                                                              | Indicates whether or not the bug has an impact on an object stored in the Customization Repository.<br>See <a href="#">Using Customization Repository</a>                                                                                                                                                                                                                     |
| <b>Test Exists</b>                                                                | A visual indicator will be displayed if the bug has an impact on a referenced component stored in the Test Repository.<br>See <a href="#">Using the Test Repository</a>                                                                                                                                                                                                       |
|  | Click the Bug Details icon to display the Bug information.                                                                                                                                                                                                                                                                                                                    |
| <b>Excluded Bug Fixes Section</b>                                                 | Expand this section to view bugs that are excluded from the package, excluded bug will include bugs that have already been applied, bugs the user excluded, bugs that fail to meet the minimum tools level, and bugs that are required for upgrade.                                                                                                                           |
| <b>Overlapping Packages Section</b>                                               | This section will appear if any of the bugs selected have already been included in another change package definition that has not been applied to the database.<br><b>Note:</b> If overlapping packages are listed, you will be prompted to either click OK to ignore the overlapping packages, or click Cancel to return to the previous page and review the change package. |

## Bug Details

When you click the bug details icon, a modal window is displayed:

This example illustrates the fields and controls on the Example Bug Details (top of page). You can find definitions for the fields and controls later on this page.

Bug Details

BUG Number

30995137

Minimum Tools Release(s)

8.53.10

Subject

PEOPLECODE ERROR ON REQUEST ABSENCE PAGE

Delivered in Image

35

Severity

2 - Severe Loss of Service

Product Name

PeopleSoft Enterprise HCM Absence Management

Resolution

Modified code to resolve error in old databases for Request absence page.

Summary of Metadata for this Package

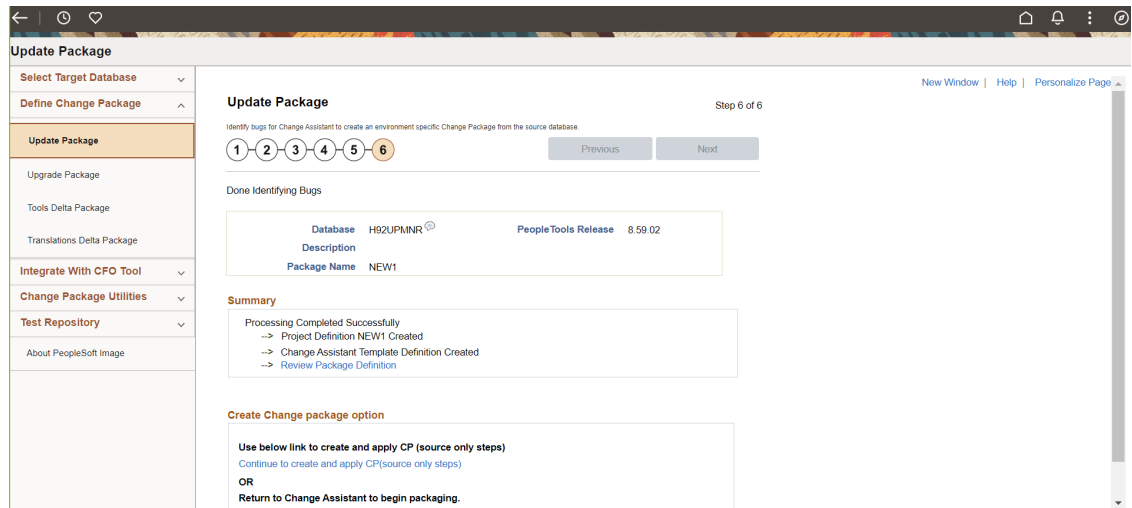
| Metadata Type                          | Status                    |
|----------------------------------------|---------------------------|
| Tags Defined by Bug                    | Not Applicable            |
| Managed Objects Included in Update     | <a href="#">Available</a> |
| ADS Managed Objects Included in Update | Not Applicable            |
| Pre-requisite Bugs                     | <a href="#">Available</a> |
| Post-requisite Bugs                    | Not Applicable            |
| Customizations Impact                  | <a href="#">Available</a> |
| Existing Tests                         | Not Applicable            |
| Components To Test                     | No Data Available         |

| Field or Control                              | Description                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Summary of Metadata for this Package</b>   | For each metadata type, if there is metadata, a link Available is displayed. Use this link to go to that section of the bug detail.<br>If the metadata type is not contained in the package, the metadata type will indicate Not Applicable.<br>Bugs delivered through a PRP will have no data on components to test , therefore Components to Test will indicate No Data. |
| <b>Pre-requisite Bugs</b>                     | List of pre-requisite bugs, their subjects and image numbers. Click the Details icon to open a window with the bug details.                                                                                                                                                                                                                                                |
| <b>Tags Defined by Bug</b>                    | The tag name and value represent the tracking group and value. A bug can have 0-n Tracking Groups defined.                                                                                                                                                                                                                                                                 |
| <b>Managed Objects Included in Update</b>     | List of managed objects included in the change package. The object columns list the records, fields and so on, that are part of the fixes in the bug.                                                                                                                                                                                                                      |
| <b>ADS Managed Objects Included in Update</b> | List of ADS managed objects included in the change package. The columns list the Data Set name, customization count, data set record, and object values that are part of the fixes in the bug.                                                                                                                                                                             |
| <b>Post-requisite Bugs</b>                    | List of post-requisite bugs, their subjects and image numbers. Click the Details icon to open a window with the bug details.                                                                                                                                                                                                                                               |
| <b>Customizations</b>                         | Lists the names of the customizations that affect this bug.                                                                                                                                                                                                                                                                                                                |
| <b>Tests</b>                                  | Lists the test names that provide coverage for this bug.                                                                                                                                                                                                                                                                                                                   |
| <b>Components to Test</b>                     | Lists the components to test for this bug.                                                                                                                                                                                                                                                                                                                                 |

## Define Update Package Wizard Step 6 of 6

When you transition to step 6, the Change Package Aggregator will execute. The Change Package Aggregator is an engine that aggregates the steps from one or more BUG step apply structures into one single list of steps. This list of steps is then passed to the Change Packager API so that a Change Assistant template can be generated. The Change Package Aggregator will also remove any duplicate steps.

This example illustrates the fields and controls on the Define Update Package Step 6 of 6. You can find definitions for the fields and controls later on this page.



A summary is displayed for the Change Package. A link is provided to Review Change Package.

See [Reviewing Change Package](#)

From 8.60, you can either create and apply change package from this step or return to Change Assistant to begin packaging.

You can also define and create Change Package from the Define Job page ( select Update Scheduler, Define Job).

For Upgrade Package type, only Create Change Package option is available.

For all other package types, Create and Apply Change Package options are available.

Refer [Scheduling Update Jobs](#)

# 21

## Applying Custom Change Packages

### Packaging Updates

After defining the Change Package, you must return to Change Assistant to create the package.

1. Select Tools, Create Change Package.
2. Select the new change package from the drop down list.
3. Optionally select the Apply Change Package check box.  
If selected the Apply Change Package Wizard will launch when the package is created.
4. Click Finish.

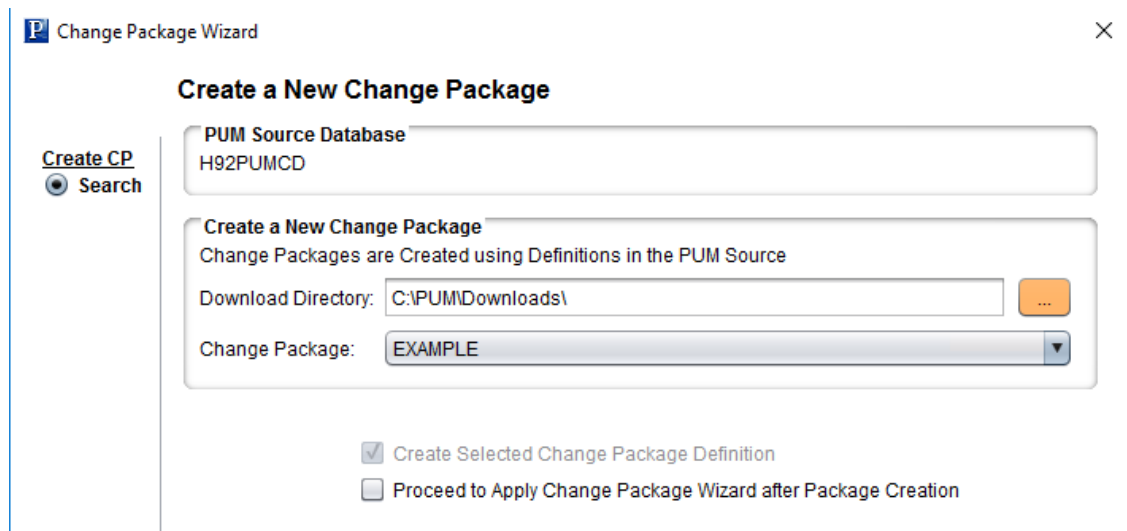
The progress dialog box will open to indicate the change package is being created.

The change package is created as upd<change package definition name>.zip. For example updPKG1.zip.

5. Click OK on the message *Change Package <package name> has been successfully Created in the Download Directory.*

Change Packager is also aware of the target environment, including the platform and all installed products. The Change Package will include platform and product filters.

This example illustrates the fields and controls on the Create a New Change Package. You can find definitions for the fields and controls later on this page.



**Change Package Wizard**

**Create a New Change Package**

**Create CP**  
☒ **Search**

**PUM Source Database**  
H92PUMCD

**Create a New Change Package**  
Change Packages are Created using Definitions in the PUM Source

Download Directory: C:\PUM\Downloads\...

Change Package: EXAMPLE

☒ Create Selected Change Package Definition  
☐ Proceed to Apply Change Package Wizard after Package Creation

| Field or Control                                                     | Description                                                                                                                                                                                     |
|----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Download Directory</b>                                            | When the change package definition is defined on the PUM Source, it will be downloaded to the directory indicated here. By default the download directory defined for Change Assistant is used. |
| <b>Change Package</b>                                                | Select the change package definition from the drop down list.                                                                                                                                   |
| <b>Create Selected Change Package Definition</b>                     | This check box is selected and read-only. After selecting the change package definition when you click Finish, Change Assistant will create the change package in the download directory.       |
| <b>Proceed to Apply Change Package Wizard after Package Creation</b> | Select this option if you want to apply the change package as soon as it's created. If you leave this check box cleared, you can review the Change Package before applying it.                  |

### Change Package Contents in the Download Directory

The download directory will contain the following:

- Zip file for the change package name upd<changepackage\_name>.zip
- Project Directory named upd<changepackage\_name>

Depending on the updates selected, the project directory contains the following folders:

| Field or Control               | Description                                                  |
|--------------------------------|--------------------------------------------------------------|
| <b>changeassistanttemplate</b> | Contains the Change Assistant template for the update job    |
| <b>DATA</b>                    | Contains any data files required for the selected updates.   |
| <b>Documentation</b>           | Contains the documentation for the Change Assistant job.     |
| <b>Projects</b>                | Contains the Managed Objects project.                        |
| <b>Scripts</b>                 | Contains any scripts files required for the selected updates |
| <b>SQR</b>                     | Contains any SQRs included in the selected updates.          |

## Applying Change Package

The Apply Change Package wizard will guide you through the configuration based on the Apply Type that is selected.

## Understanding the Apply Update Process

When the custom change package containing your selected updates is created not all files are included in the change package for 2 major reasons:

1. Reduces the time it takes to create the initial package.

2. Leverages Change Assistant job filtering to eliminate the creation of files not required by your target environment.

The update job is filtered based on the target environment and only the files required for the target environment are created from the PUM source. Depending on where the PeopleSoft Update Image (PUM Source) is installed the process may be very time-consuming, to alleviate this issue customers have the option to run the source and target steps in separate jobs.

The initial pass to apply updates has the following options:

- Source Steps Only

The Source Steps Only option provides the ability to run the initial pass to create all files that are contained in the change package. This job can be run on the same machine where the PUM Source is installed. Once the initial pass has completed, a modified change package is created that contains all the files. The modified update change package can then be copied to the machine where you will run the Apply Update on your target database.

- Target Steps Only

Using the new change package created from the Source Steps Only job, you can apply the change package to your target database without requiring a connection to the source database. When the job is created for the target environment, all unnecessary files are filtered out.

- All Steps

All steps requires a connection to both the target database and the PUM source. When this option is selected, the source steps will create the necessary files needed for the target system.

## Applying the Change Package

To apply the change package:

1. Start EMF if it is not already started and you selected *Configure EMHub For File Deploy* on the EMHub Options page in Change Assistant.

### Note

EMHub is only required for file deploy. If you plan to manually deploy file, skip this step. If EMHub is not running, the Change Package template will include a step to manually copy the files included in the Change Package to the various Application Server(s), Web Server(s) and File Server(s) associated with the current Target Database.

2. In Change Assistant, select Tools, Change Actions.
3. Select Update Manager and Click Next.

### Note

If you are already in the Update Manager action, select Tools, Apply Change Package.

4. Select Apply Change Packages and click Finish.

5. Select the download directory where the change package was created.
6. Select the change package that was created for your custom change package definition.
7. Select *Initial Pass*.

By default All Steps is selected. Change this value if you choose to decouple the source and target steps.

This example illustrates the fields and controls on the Change Package Settings page. You can find definitions for the fields and controls later on this page.

**Change Package Wizard** [X]

### Change Package Settings

**Task Steps**  
☒ Settings

**PUM Source Database**  
 H92PUMCD

Download Directory: C:\PUM\Downloads [...]

Change Package: updEXAMPLE.zip [v]

**Apply Type**  
☒ Initial Pass  
☒ All Steps  
☐ Source Steps Only  
☐ Target Steps Only  
☐ Subsequent Pass  
☐ Move To Production

Synchronize Target Metadata (Requires Source) ☒ Yes ☐ No

| Field or Control          | Description                                                                                                                                                                                     |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Download Directory</b> | When the change package definition is defined on the PUM Source, it will be downloaded to the directory indicated here. By default the download directory defined for Change Assistant is used. |
| <b>Change Package</b>     | The change package name will include the change package definition. upd<your change package name>.zip.                                                                                          |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Apply Type       | <ul style="list-style-type: none"> <li>Initial Pass<br/>You will first apply the update to your development environment which is an Initial Pass.<br/>In the Initial Pass you will perform compares to retrofit your customizations and repackage the update to include all your customizations.<br/><b>Important:</b> Development environment must have the same maintenance level as any additional targets where you intend to subsequently reuse this package (after incorporating customizations) and apply them using the <i>Move to Production</i> apply type.<br/>In the initial pass, you can select which steps to perform.<br/>See <a href="#">Understanding the Apply Update Process</a></li> <li>Subsequent Pass<br/>The final step in the initial pass creates a modified change package which includes all your customizations. This modified change package is then used to apply the updates to additional target databases the same maintenance level. If you select subsequent pass, the modified change package will contain Less manual stops than the initial pass, but will include a manual stop to review the change package and a step to update the change package. Typically you would run an initial pass, then a subsequent pass and then the final move to production.<br/><b>Note:</b> The subsequent pass template is similar to the Move to Production pass templates delivered in Images on PeopleTools releases prior to 8.57.</li> <li>Move to Production<br/>Use the Move to production pass to apply your updates to the Production database. This pass will execute the SQL's used in the initial pass or subsequent pass bypassing the build steps. There are less steps and manual stops reducing apply time.<br/>See <i>PUM Best Practices and Maintenance Strategy</i> document post on the PUM Homepage. <a href="#">Update Manager Home Page</a></li> </ul> |

| Field or Control                                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Synchronize Target Metadata (Requires Source)</b> | <p>Select <i>Yes</i> to upload the target database information to the PUM Source when the update is applied.</p> <p>The default is <i>Yes</i>, however if you are applying the update to a database that is not used for defining and creating change packages in PUM, there is no need to upload the database information to the PUM Source and you would select <i>No</i>.</p> <p><b>Note:</b> If the PUM source is not defined, this option will not be enabled.</p> |

8. Click Next.
9. Select the target database.

**Note**

Use the Create button to create the target database if it has not been previously created. See [Defining Databases](#) and [Defining Target Database](#)

10. If you are using EMHub, select the file server.

This example illustrates the fields and controls on the Select Target Database page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Change Package Wizard' window with the 'Select Target Database' tab selected. The 'Task Steps' on the left include 'Settings' and 'Select Target' (which is active). The main area contains several sections: a 'Database' dropdown set to 'H92CD610' with a 'Create' button; an 'EMF Managed Servers' table with columns 'Server', 'Host', 'App Home', 'PS Home', 'Cfg Home', and 'Release'; an 'Available File Servers' table with columns 'Select', 'Host Name', 'Path', and 'Release'; a 'Login Information' section with fields for 'User ID' (PS), 'Access ID' (emdbo), 'Connect ID' (people), and 'DBOwner ID'; an 'SQL Query Tool' field with the path 'C:\oracle12c\product\12.1.0\dbhome\_1\BIN\sqlplus.exe'; and a 'Current Homes' section with a 'PS Home' field containing 'C:\PT8.57.11\_Client\_ORAI'. At the bottom are 'Back', 'Next', 'Finish', and 'Cancel' buttons.

| Server | Host | App Home | PS Home | Cfg Home | Release |
|--------|------|----------|---------|----------|---------|
|--------|------|----------|---------|----------|---------|

| Select | Host Name | Path | Release |
|--------|-----------|------|---------|
|--------|-----------|------|---------|

**Login Information**

User ID: PS

Access ID: emdbo

Connect ID: people

DBOwner ID:

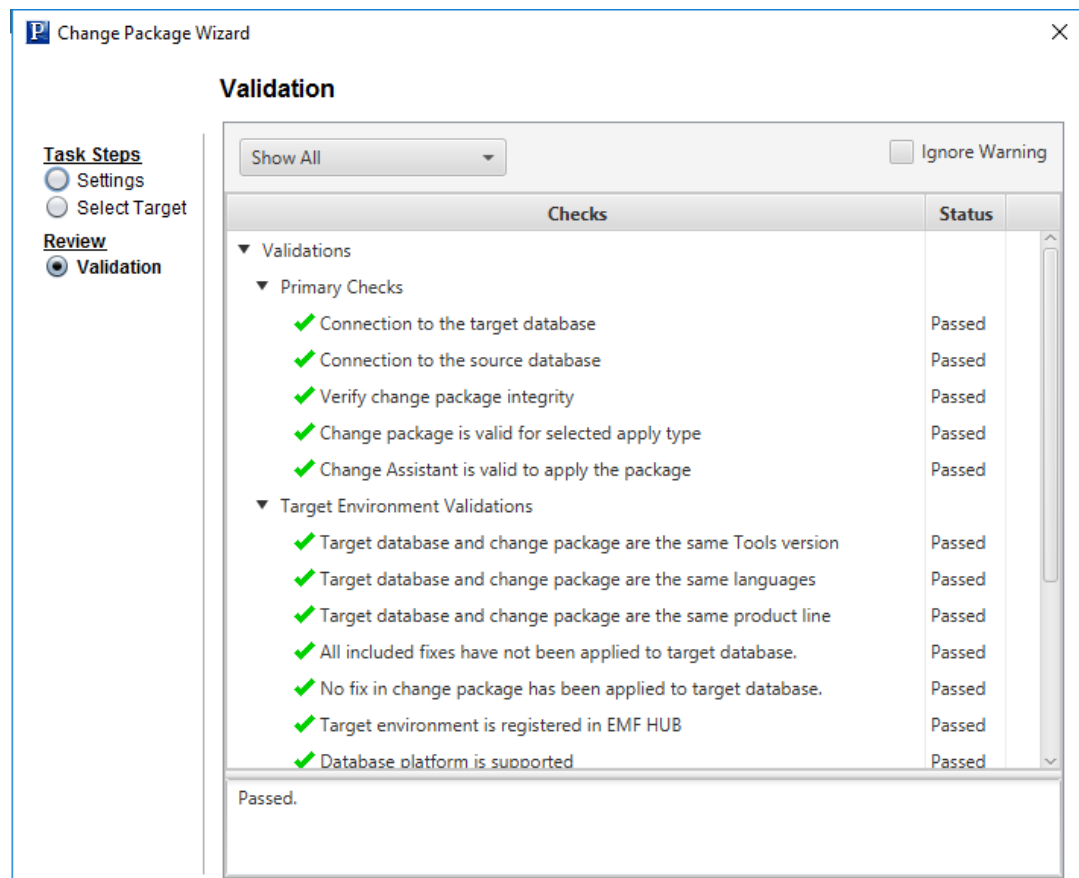
SQL Query Tool: C:\oracle12c\product\12.1.0\dbhome\_1\BIN\sqlplus.exe

**Current Homes**

PS Home: C:\PT8.57.11\_Client\_ORAI

11. Click Next.
12. Change Assistant will perform primary checks, validate the target environment and validate the source environment. The Validation page displays the status for the specific validations.

This example illustrates the fields and controls on the Validation page.



13. Click Next.
14. The Apply Summary is displayed, click Finish.  
Change Assistant will begin building the Change Assistant job.
15. The Update job will be created and open in Change Assistant.

## Reviewing the Change Assistant Job

After you apply a change package, the Change Assistant job is created using the selected change package and options.

## Understanding Job Naming Conventions

The Update job name reflects the criteria selected for the job.

Softwareupdate.<PACKAGE NAME>.{<PUM SOURCE DATABASE>-<TARGET-DATABASE>}<IP or MTP>

For example:

Softwareupdate.SELECTIVE.{HR92U016-HC920001}IP

In this example, the package name is SELECTIVE, the PUM source database is HR92U016, the target database is HC920001, and the apply type is Initial Pass.

## Staging and Output Directories

When the Change Assistant job is created, a folder for the job is created in both the Staging and Output directory. The folder will have the same name as the Change Assistant job. In the example above the folder would be named *softwareupdateSELECTIVE{HR92U016-HC920001}IP*.

When Change Assistant is creating a new job, if an existing output and staging folder is found, Change Assistant will add a number to the folder, for example, *softwareupdateSELECTIVE{HR92U016-HC920001}IP.1*.

## Understanding Job Filtering

Change Assistant will filter the job to only include the steps that apply to your environment. The job is filtered by step attribute criteria, including:

- Platform
- Language
- Products
- PeopleTools Release
- Orientation
- EM Hub

If the EM Hub is defined and the target database is defined to the hub, the file deploy steps will be included in the job, if it is not defined, the file deploy steps will be set to Filtered at the Job Level.

- Synchronize Target Metadata

If the Synchronize Target Metadata option is set to No , the step Re-Synching Target Details with PI Image will be set to Filtered at the Job Level.

## Creating Filtered Documentation

The Change Assistant template is delivered with embedded documentation to help guide you through the change package jobs, especially the manual steps. You can create a single HTM file that is filtered to contain only the documentation for the chapters, tasks, and steps relevant to your job. This section assumes that you have created a Change Assistant job from a PUM change package. To create the filtered documentation:

1. In Change Assistant, in Update Manager mode, highlight the root node of the template.
2. Right-click, and select Finalize Documentation.

This produces a single consolidated HTM file named for the update job. The file is saved on your client machine in the following location, where *<staging\_directory>* is the directory you specified on the General Settings page:

```
<staging_directory>\<change assistant job
name>\Documentation\<package_name>.htm
```

For example: *D:\PUM\Staging\softwareupdateSELECTIVE{HR92U016-HC920001}IP\Documentation\SELECTIVE.htm*.

## Running Change Assistant Job

Change Assistant will execute each step in the job until completion, unless a manual step or error is encountered.

When you encounter manual steps you will need to take some action, such as review compare reports. If you make any changes while the job is executing, you will want these same changes applied to additional targets.

### Running SQRReport Steps

For Change Assistant jobs created from PUM change packages only, you can edit the SQRReport step type to add a user-defined Run Control ID, as follows:

1. Highlight the step and select Edit, Step Properties.
2. Select the Step Definition tab.
3. Click Additional Settings.
4. Add the Run Control ID, and specify any other settings needed.  
If no value is entered for Run Control ID, the default value ADHOC is used.
5. Click OK twice and restart the Change Assistant job.

## Updating Package for Subsequent Passes

The last steps in the initial pass and subsequent pass template are used to prepare your change package for the Move to Production.

| Step                                                                  | Type             | Description                                                                                                                                                                                                                              |
|-----------------------------------------------------------------------|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Copying Customized Codeline Objects                                   | Manual Stop      | Manually copy your customized codeline objects (located in PSHOME / PS_APP_HOME / PS_CFG_HOME or such similar locations to the staging directory.                                                                                        |
| Merging CP and CP Invalid View Projects                               | Merge Project    | Merges the additional invalid views project (if one was created during the initial pass) into the existing project resulting in a single project. The merged project is used in all subsequent applies using the updated change package. |
| Exporting Modified Package-MO Project                                 | CopyToFile       | Copies the managed object project to a file.                                                                                                                                                                                             |
| Exporting Modified ADS-MO Project<br>Only if Required                 | AEWithRunControl | Consolidates multiple ADS projects into one project and copies it to a file.                                                                                                                                                             |
| Exporting Modified ADS Project - [ADSProjectName]<br>Only if Required | AEWithRunControl | Copies individual ADS project (by bug) to a file.<br><b>Note:</b> There will be a step created for each ADS project included in the change package.                                                                                      |

| Step                           | Type                | Description                                                                                 |
|--------------------------------|---------------------|---------------------------------------------------------------------------------------------|
| Create Modified Change Package | UpdateChangePackage | The change package is zipped to the staging directory and ready for the Move to production. |

## Moving to Production

In the Initial Pass, you applied the custom change package to your development database. In the process of applying the change package, you completed all compares and adjusted the change package to retrofit any customizations to your system. Once you have tested the updates, you are ready to deploy the updates to your other target environments using Subsequent Pass.

The Subsequent Pass uses the modified change package created in the initial pass to apply the updates to additional databases. During the subsequent pass, you have the opportunity to further modify the template for customizations if needed. At the end of the subsequent pass, a new modified change package is created.

The Move to Production Pass uses the modified change package created in the initial or subsequent pass to apply the updates to the production database.

To apply the updates to your target databases:

1. (Optional) Start EMF if it is not already started and you selected *Configure EMHub For File Deploy* on the EMHub Options page in Change Assistant.

### Note

EMHub is only required for file deploy. If you plan to manually deploy file, skip this step.

2. In Change Assistant, select Tools, Change Actions.
3. Select Update Manager and Click Next.

### Note

If you are already in the Update Manager action, select Tools, Apply Change Package.

4. Select Apply Change Packages and click Finish.
5. Select the download directory where the change package was created.
6. Select the change package that was created for your custom change package definition.
7. Select *Move to Production*.
8. Click Next.
9. Select the target database.

**Note**

Use the Create button to create the target database if it has not been previously created. See [Defining Databases](#)

10. If you are using EMHub, select the file server.
11. Click Next.
12. Change Assistant will connect to the target database and check compatibility. The Compatibility Check page will then be displayed.
13. Click Next.
14. The Apply Summary is displayed, click Finish.  
Change Assistant will begin building the Change Assistant job.
15. The Update job will be created and run until it completes or encounters an error.

**Note**

There are no manual stops in the Move to Production.

# Applying PeopleSoft Release Patchset to PeopleSoft Update Image

## Applying Downloaded PeopleSoft Release Patchset to PeopleSoft Update Image

The PeopleSoft Update Image will be available on a regular schedule and is the source of all updates to your application, however there may be times when a critical fix is necessary and you can not wait for the next PeopleSoft Image. When this circumstance occurs, it will be necessary to download the PeopleSoft Release Patch from My Oracle Support (MOS).

You will apply the PRP to the current PeopleSoft Update Image so that you can continue to take advantage of the powerful PeopleSoft Update Manager PIA application to generate a custom change package including requisite updates that may have already been posted. The PRP change package includes the metadata required to keep your current PeopleSoft Image up to date. Every PRP will be included in the next scheduled release of the PeopleSoft Image which is cumulative of all updates.

### Important

The pi\_home directory requires read and write access to apply PeopleSoft Release Patchsets (PRPs).

### Warning

Because PRPs are created for specific UIs, the PRP can only be applied to the specific UI for which it was created. Change Assistant will not allow you to apply a PRP directly to your PeopleSoft environment.

To download and apply an individual fix:

1. Discover and download the PRP from MOS.
2. Use Change Assistant to apply the PRP to the PeopleSoft Image database.
3. Create a new custom change package definition using Define Change Package option in the Update Manager Action.  
See [Defining Change Package](#)
4. Apply the new custom change package the same as any other update from the PeopleSoft Image.  
See [Applying Change Package](#)

## Discovering and Downloading the PRP

Before you download the change package for the PRP, make sure that you have set up a download directory on your local machine.

To discover and download the PRP:

1. Create a download directory on your local machine.
2. Log onto My Oracle Support and Select the Patch and Updates tab.
3. Search for PeopleSoft Release Patchsets (PRP) by Bug Number, Product, or Product Family.
4. Search for PRPs.

Use the Patches and Updates tab in My Oracle Support to search for PRPs. PRPs have a classification of Critical.

5. Open the fix details to review the fix.
6. From the Patch Details page, click Download.
7. Select the Include Prerequisites checkbox to list all the prerequisite change packages.
8. In the file download window, click on the change package name and select Save.
9. Select your download directory.

## Applying the PRP to the PeopleSoft Image

To apply the PRP to the PeopleSoft Image:

1. In Change Assistant, select **Tools**, and then **Change Actions**.

### Note

If you are already in the Update Manager Action, select Tools, Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image then go to step 4.

2. Select Update Manager and click Next.
3. Select Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image and click Finish.
4. Select the download directory where you downloaded the PRP change package and click Next.
5. Select the PRP change package or packages from the list displayed and click Next.
6. Change Assistant will verify that the package is compatible with the UI (Update Image) version. If it is not compatible, you will receive a message to Cancel.
7. The Change Assistant job will start running.

## Applying the PRP to Target Database

After the PRP has been applied to the PeopleSoft Image database, it is now available for you to apply to your target environments using the Update Manager action. Apply the PRP as you would any other update.

See [Defining Change Package](#)

# Applying PeopleTools Patch

## Using Change Assistant to Apply PeopleTools Patch

### Understanding PeopleTools Patch

PeopleTools patches deliver fixes between PeopleTools minor releases. PeopleTools patches are posted to My Oracle Support, as they become available. PeopleTools patches are cumulative. They include all fixes from all previous patches for the specified release. For example, patch .03 contains all the fixes contained in the .02 patch as well as all of those contained in the .01 patch.

The patch is provided in the PeopleTools DPKs. For information on using the PeopleTools DPKs, see *PeopleSoft PeopleTools Deployment Packages Installation*.

The PeopleTools patch location is always the PTP directory in your target PS home.

### Locating and Downloading PeopleTools Patch

To locate and download the DPKs:

1. Go to the PeopleSoft PeopleTools Patches Home Pages, My Oracle Support, Doc ID [2062712.2](#), to find the information on locating and downloading the latest PeopleSoft PeopleTools patch.

The PeopleTools Patches Home Pages contain links to the patch, as well as the links to the installation documentation.

2. Download the DPK zip files into a single directory, referred to in this documentation as `DPK_INSTALL`.

Be sure that the `DPK_INSTALL` directory has adequate available space for all the zip files. When you download, there will probably be multiple zip files. The multiple files are needed due to size limitations.

The files names are comprised of the following parts:

- `<Operating_System>` is LNX for Oracle Linux, WIN for Microsoft Windows, AIX for IBM AIX, or SOL for Oracle Solaris for SPARC.
- `<Release>` is the release and patch number for the product, such as 8.56.04.
- `n` represents the total number of zip files

The zip files have the following format:

PEOPLETOOLS-`<Operating_System>`-`<Release>`-#ofn.zip

For example for Linux the files would be:

PEOPLETOOLS-LNX-8.56.02-1of4.zip

PEOPLETOOLS-LNX-8.56.02-2of4.zip

PEOPLETOOLS-LNX-8.56.02-3of4.zip

PEOPLETOOLS-LNX-8.56.02-4of4.zip

## Installing the Patch

Refer to the installation documentation posted on the [PeopleSoft PeopleTools Patches Home Page 2062712.2](#) for instructions on installing the PeopleTools DPK.

## Installing a New PeopleTools Patch Version of Change Assistant

When you install the new release PeopleTools Client from the PeopleTools DPK, you will be prompted if you want to install Change Assistant, select Y.

See the PeopleSoft PeopleTools Deployment Packages installation guide on the [PeopleSoft PeopleTools Patches Home Page 2062712.2](#), **Applying PeopleTools Patches Using DPKs**.

### Note

You need to install the latest version of Change Assistant in order to apply the PeopleTools patch to your target database. When you install the PeopleTools Client from the DPK, it installs the latest Change Assistant.

See [Installing Change Assistant](#)

## Configuring Change Assistant for Applying a PeopleTools Patch

To apply a PeopleTools Patch, the following configurations is required:

- General Options

If the general options have not been previously defined, the Change Assistant Wizard will open this page when you select an action. See [Opening Change Assistant the First Time](#)

Alternatively, you can populate the General options using the command line. See the section Command Line for Setting Options in [Update Manager Mode](#)

- Database Definition

Each target database will need to be defined. You can define a database by selecting File, New Database or clicking the Create button on the Select Target Database page. See [Defining Databases](#)

Alternatively, you can define the target database using the command line. See the section Command Line for Creating Environments in [Update Manager Mode](#)

## Applying the PeopleTools Patch Change Package

To apply the PeopleTools patch in Change Assistant:

1. In Change Assistant, select Tools, Change Actions.
2. Select Update Manager and click Next.
3. Select Apply a Patch to your Current PeopleTools Release and click Finish.
4. Review the Change Package Settings page and click Next.

PeopleTools patches do not use the PUM Source, so it will indicate Not Set.

The download directory is always the PTP directory in your target home.

PeopleTools patches are always applied to the target database.

5. Select the target database, if the database has not been defined yet use the Create button to create the database.

See [Defining Databases](#)

6. Click Next.
7. Select the Change Package.

This example illustrates the fields and controls on the Select PeopleTools Patch to Apply.

**Change Package Wizard**

**Select PeopleTools Patch to Apply**

Patch Target: T1C85801  
 Target Database Tools Release: 8.58.01  
 Target PS\_HOME Tools Release: 8.58.02  
 PeopleTools Patch Location: C:\PT8.58.02\_Client\_ORA\PTP\

**Task Steps**

- ☐ Settings
- ☐ Select Target
- ☒ Select Patch

**Select Package**

| Select                           | Package Name | Description                          | Date              |
|----------------------------------|--------------|--------------------------------------|-------------------|
| <input checked="" type="radio"/> | PATCH858     | PTP Package Containing 145 Update(s) | 2020-01-07-20.... |

**Other PeopleTools Patch Change Packages Found but Not Selectable**

| Select | Package Name | Description | Date |
|--------|--------------|-------------|------|
|--------|--------------|-------------|------|

8. Click Next.
9. Change Assistant performs a PeopleTools patch version check. Review the messages and click Next.

A warning is displayed if the selected patch is at the same or a lower level than the installed PeopleTools patch. It is not recommended to re-apply or downgrade PeopleTools patches.

10. The Apply Summary page is displayed, review the summary and click Finish.
11. Change Assistant will load the change package and run the PeopleTools patch job.
12. All steps will run unattended and when the last step is complete you will receive a message that there are no more steps to run.

### PeopleTools Patch Level

In PeopleTools 8.54, a new field PTPATCHREL was added to the PSSTATUS table. When you apply a PeopleTools patch, the PTPATCHREL field is updated with the new PeopleTools patch level.

### Using Command line to Apply PeopleTools Patch

Alternatively, If you have configured a target database and general options in Change Assistant, you can apply the PTP via the command line by using an updated version of the following syntax: For example:

```
Changeassistant.bat -MODE UM -ACTION PTPAPPLY -TGTEENV
<YOUR_TARGET_DB_ENV_NAME_LIKE_PT856TST> -UPD PATCH856
```

See the section Command Line for Applying PeopleTools Patch in [Update Manager Mode](#)

# Upgrading PeopleTools

## Using Change Assistant to Upgrade PeopleTools

### Understanding PeopleTools Upgrade

PeopleTools upgrades involve two major components:

- New PeopleTools release.
- Change Package containing databases changes for the new PeopleTools Release.

The PeopleTools 8.5x Upgrade Homepage on My Oracle Support provides links to the information and resources for your PeopleTools upgrade.

Your documentation and template files are delivered differently depending on which of the following installation methods you are using:

- PeopleTools DPK

The PeopleTools DPKs also contain the upgrade documentation, upgrade template, and files.

- Software downloaded from the Oracle Software Delivery Cloud (OSDC)

Download the Change Package from the upgrade home page to get your template and HTML documentation.

Upgrading Oracle's PeopleSoft PeopleTools software requires planning, resources, testing, and training. The PeopleSoft PeopleTools upgrade documentation provides information to help you get started planning for your upgrade and installing the new release.

#### Important

The PeopleSoft PeopleTools upgrade documentation provides all of the steps necessary to prepare for and upgrade PeopleTools.

The PeopleSoft PeopleTools Upgrade involves the following steps:

1. Installing the New Release

Refer to *PeopleSoft PeopleTools Deployment Packages Installation*.

2. Applying a PeopleTools Patch

If you installed the new release using OSDC, you will need to download the latest PeopleTools patch from My Oracle Support.

See [Using Change Assistant to Apply PeopleTools Patch](#)

3. Installing PeopleSoft Change Assistant

See [Installing Change Assistant from PeopleTools Client DPK](#)

**Note**

If Change Assistant was installed on a previous release, you will be prompted to remove the existing Change Assistant. For some release/patch levels, the installation may perform an update and all your configurations settings can be retained.

4. Applying the PeopleTools Upgrade Change Package
  - a. Downloading the PeopleTools Upgrade Change Package

**Note**

If you used DPK to deploy PeopleSoft PeopleTools, you do *not* need to perform this step.

- b. Setting Up Change Assistant

See [Configuring Change Assistant for PeopleTools Upgrade](#) and [Configuring Change Assistant for Update Manager – Upgrade to a New Release of PeopleTools](#)
  - c. Upgrading PeopleTools

See [Upgrading to a New Release of PeopleTools](#)
  - d. Reviewing Upgrade Step Properties

## Configuring Change Assistant for PeopleTools Upgrade

When performing a PeopleTools Upgrade, you will always be using a newly installed version of Change Assistant at the new PeopleTools release/patch level.

To configure Change Assistant for PeopleTools upgrade:

1. Launch Change Assistant.
2. At the Welcome menu, click Next.

De-select the Always show this page if you want to bypass the Welcome menu next time you launch Change Assistant.
3. On the Select Action page, select *Update Manager* and click Next.
4. If this is the first time you are selecting Update Manager, the Wizard will guide you through the Change Assistant setup.

See [Configuring Change Assistant for Update Manager – Upgrade to a New Release of PeopleTools](#)
5. On the Select Task page, select *Upgrade to a New Release of PeopleTools* and click Finish.
6. To apply the PeopleTools upgrade, the Wizard will guide you through the environment setup.

See [Upgrading to a New Release of PeopleTools](#)

## Configuring Change Assistant for Update Manager – Upgrade to a New Release of PeopleTools

If this is the first time you are selecting Update Manager, the Wizard will guide you through the Change Assistant setup. As you click Next you will complete the following pages:

1. General Options
2. PUM Source Options

### Note

PUM Source is not used with PeopleTools upgrades. You will click Next to skip this page.

3. EM Hub Options

### Note

EM Hub is not used with PeopleTools upgrades. You will click Next to skip this page.

4. Additional Options
5. Select Task

### Note

Once the environment has been configured, you can use **Tools**, and then **Options** to make any changes to the environment options.

### General Options

This example illustrates the fields and controls on the General Options page. You can find definitions for the fields and controls later on this page.

**Update Manager Options**

**General** | PUM Source | EM Hub | Additional

**Settings**

☒ Show Welcome Page

Maximum Concurrent Processes: 1

PS Home Server TCP Port Range: 6151 - 6320

PS Home Server Maximum Instances: 5

Time Out for Locking(Seconds,Max=99999): 300

Data Mover Consolidation Maximum Script Limit: 1000

**Directories**

\*PS Home: C:\PT8.58.02\_Client\_ORA\

\*Staging Directory: C:\PUM\Staging\

\*Output Directory: C:\PUM\Output\

\*Download Directory: C:\PUM\Downloads\

\*SQL Query Tool: C:\oracle12c\product\12.1.0\dbhome\_1\BIN\sqlplus.exe

| Field or Control                    | Description                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum Concurrent Processes</b> | Specifies the maximum number of processes that can be executed concurrently on the local machine. The default is 1.                                                                                                                                                                                                                                                                                |
| <b>PS Home Server Starting Port</b> | Specify the port number for the first PS Home server.<br>Change Assistant uses this port number to communicate with Change Assistant PS Home servers. The default starting port number is 6151. If you enter a port number that is already in use, you see an error message. You must change to a port number that is not in use, and then restart Change Assistant for the change to take effect. |

| Field or Control                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PS Home Server Maximum Instances</b> | <p>Enter a number between 1 and 10 for the maximum number of PS Home servers.</p> <p>Use this value for environments with more than one PS_HOME. For each server instance, Change Assistant increments the PS Home Server Starting Port number by 1 up to the maximum number of instances. For example, with a PS Home Server Starting Port value of 6151 and a PS Home Server Maximum Instances value of five, the port numbers would be 6151, 6152, 6153, 6154, and 6155. The default is 5.</p> <p>If you change this value, you must restart Change Assistant for the change to take effect.</p> |
| <b>PS Home</b>                          | <p>Enter the full path to the new PeopleTools release PS_HOME.</p> <p><b>Note:</b> This is the same PS_HOME used to install Change Assistant.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Staging Directory</b>                | <p>Enter the directory in which you would like to stage all the Change Assistant upgrade files. This is the location that Change Assistant will store files to be used during the upgrade to new PeopleTools process.</p>                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Output Directory</b>                 | <p>Enter the directory in which you want the log files generated by the upgrade process to reside.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Download Directory</b>               | <p>Enter the full path of the location to which you want to download your change packages.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SQL Query Tool   | <p>Select the correct executable for the database platform that matches the PS_HOME defined for CA. This value is used as the default when creating environments. Each environment contains separate settings and therefore, you can change this executable for a specific database.</p> <p>Valid SQL query executables for each platform are:</p> <ul style="list-style-type: none"><li>• DB2: db2cmd.exe</li><li>• Microsoft SQL Server: sqlcmd.exe</li><li>• Oracle: sqlplus.exe</li></ul> <p><b>Note:</b> Change Assistant uses the command line version of the .exe, not the GUI version. For example, sqlplus.exe is used for an Oracle database, rather than sqlplusw.exe.</p> <p><b>Important:</b> <i>Oracle Database Customers:</i> For systems running on the Oracle database, by default, Change Assistant copies the generated SQL script files to the location specified as the TEMP User variable on the Environment Variables dialog box. So, on Oracle, the generated SQL script files will actually exist in two locations: the specified Change Assistant output directory, and the TEMP directory. This behavior is in place because some versions of Oracle SQL Plus do not support pathnames longer than 79 characters. It is recommended that you ensure that the value specified for the TEMP User variable is set to a path short enough so that the string comprising the path and generated SQL file will not exceed 79 characters.</p> |

### Additional Options

This example illustrates the fields and controls on the Change Assistant - Additional Options page. You can find definitions for the fields and controls later on this page.

**Update Manager Options**

General PUM Source EM Hub **Additional**

**Email**

☐ Send Email Notifications

SMTP Server:

Port:

Send To:

Return Address:

Test

**Proxy**

Host:

Port:

☐ Anonymous Proxy

☐ Microsoft Proxy Server Windows Domain:

☒ Other Proxy Servers

### Notification Settings Section

| Field or Control                | Description                                                                                                                                                                                            |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Send Email Notifications</b> | Select this check box to receive email notifications if there are errors in the upgrade process. Change Assistant also sends you a completion message when it encounters a Stop in the update process. |
| <b>SMTP Server</b>              | Enter the SMTP mail server from which you receive the error or completion messages.                                                                                                                    |
| <b>Port</b>                     | Enter the port from which you want to access the email.                                                                                                                                                |
| <b>Send To</b>                  | Enter the address to which you want the email sent.                                                                                                                                                    |
| <b>Return Address</b>           | Enter the email address of the sender. Use this to identify who sent the notification.                                                                                                                 |
| <b>Test</b>                     | Validates that email is sent to the designated recipients and is working correctly.<br><b>Note:</b> Ensure that your SMTP server is installed and configured correctly.                                |

## Proxy Section

| Field or Control              | Description                                                                                                                 |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <b>Host</b>                   | (Optional) Enter the name of the proxy server if you want to run Change Assistant behind the firewall using a proxy server. |
| <b>Port</b>                   | (Optional) Enter the port number for the proxy server.                                                                      |
| <b>Anonymous Proxy</b>        | Indicates that you are using a proxy server that does not require authenticated connections.                                |
| <b>Microsoft Proxy Server</b> | Indicates that you are using a proxy server with Windows authentication.                                                    |
| <b>Windows Domain</b>         | The network domain in which the system runs.                                                                                |
| <b>Other Proxy Servers</b>    | Indicates you are using non-Microsoft proxy servers.                                                                        |

## Select Task

Select Upgrade to a New Release of PeopleTools.

This example illustrates the task Upgrade to a New PeopleTools Release selected.

**Change Assistant Wizard**

**Select Task**

What would you like to do?

**Options**

- ☐ Welcome Page
- ☐ Select Action
- Options**
  - ☐ General
  - ☐ PUM Source
  - ☐ EM Hub
  - ☐ Additional
- Tasks**
  - ☒ **Select Task**

**Update Manager Tasks**

- ☐ Validate Change Assistant EMF Settings
- ☐ Upload Target Database Information to Image
- ☐ Upload Customer Data to Image
- ☐ Migrate Customer Data
- ☐ Define Change Package
- ☐ Create Change Package
- ☐ Apply Change Package
- ☐ Apply Translation Delta Package
- ☐ Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image

**Application Upgrade Tasks**

- ☐ Upgrade to New Application Release
- ☐ Apply Required For Upgrade Package

**PeopleTools Tasks**

- ☐ Apply a Patch to Your Current PeopleTools Release
- ☒ **Upgrade to a New Release of PeopleTools**
- ☐ Apply Tools Delta Package

**Other Tasks**

- ☐ Export/Import Change Assistant Settings

**Buttons:** Back, Next, Finish, Cancel

## Upgrading to a New Release of PeopleTools

To apply the PeopleTools upgrade, the Wizard will guide you through the environment setup. As you click Next you will complete the following pages:

1. Change Package Settings
2. Select Target Database
3. Select PeopleTools Upgrade
4. Validation
5. Apply Summary

### Change Package Settings

This example illustrates the fields and controls on the Change Package Settings page for a PeopleTools Upgrade. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Change Package Wizard' window with the 'Change Package Settings' tab selected. On the left, under 'Task Steps', 'Settings' is selected. The main area contains the following fields and controls:

- PUM Source Database:** A text field with the value 'Not Set'.
- Download Directory:** A text field with the value 'C:\PT8.58.02\_Client\_ORAIPTU' and a browse button (three dots) to the right.
- Apply Type:** A group box containing five radio buttons:
  - ☒ Initial Pass
  - ☐ All Steps
  - ☐ Source Steps Only
  - ☒ Target Steps Only
  - ☐ Subsequent Pass
  - ☐ Move To Production
- Synchronize Target Metadata(Requires Source):** A checkbox with 'Yes' and 'No' options. The 'No' option is selected.

For a PeopleTools upgrade, the apply type is Initial Pass and Target Steps Only.

### Select Target Database

On the Select Target Database page, select your target database if the databases were imported to the new instance of Change Assistant.

To create a new database or add the New Homes to an existing database:

1. Click the Create button, which will launch the Database Wizard.
2. On the Define Database page, enter the information for the database you are defining.

**Note**

For PeopleTools Upgrade, you must set the path information for the new PS home locations. You must also ensure that the current PS\_APP\_HOME and the current PS\_CUST\_HOME are not set to the current PS\_HOME. See [Defining Databases](#)

**3. Click Next.**

Change Assistant will query the database and gather additional database.

**Note**

Change Assistant will verify the connection to the database, including User ID/password, Access ID/password, and Connect ID/password. You will need to correct any errors before continuing to define the database.

**4. The information is then displayed on the Additional Database Details page.****5. Click Next and the Confirm Settings page is displayed.****6. Click Finish.****Select PeopleTools Upgrade**

The select PeopleTools Upgrade page will display the target database information, as well as the change package to install and any PeopleTools patches that Required at Upgrade and downloaded to the download directory.

This example illustrates the fields and controls on the Select PeopleTools Upgrade page.

Change Package Wizard

X

**Select PeopleTools Upgrade****Task Steps**

- ☐ Settings  
☐ Select Target  
☒ Select Upgrade

Upgrade Target: H92CD600

Target Database Tools Release: 8.57.05

Target PS\_HOME Tools Release: 8.57.11

Target New PS\_HOME Tools Release: 8.58.02

PeopleTools Upgrade Package Location: C:\PT8.58.02\_Client\_ORAIPTU\

**Select Package**

| Select                           | Package Name | Description      | Date            |
|----------------------------------|--------------|------------------|-----------------|
| <input checked="" type="radio"/> | PTU858       | PTU 858 TEMPLATE | 2019-12-03-1... |

PeopleTools Patches in Target New PS\_HOME

PeopleTools Patch Location: C:\PT8.58.02\_Client\_ORAIPTU\

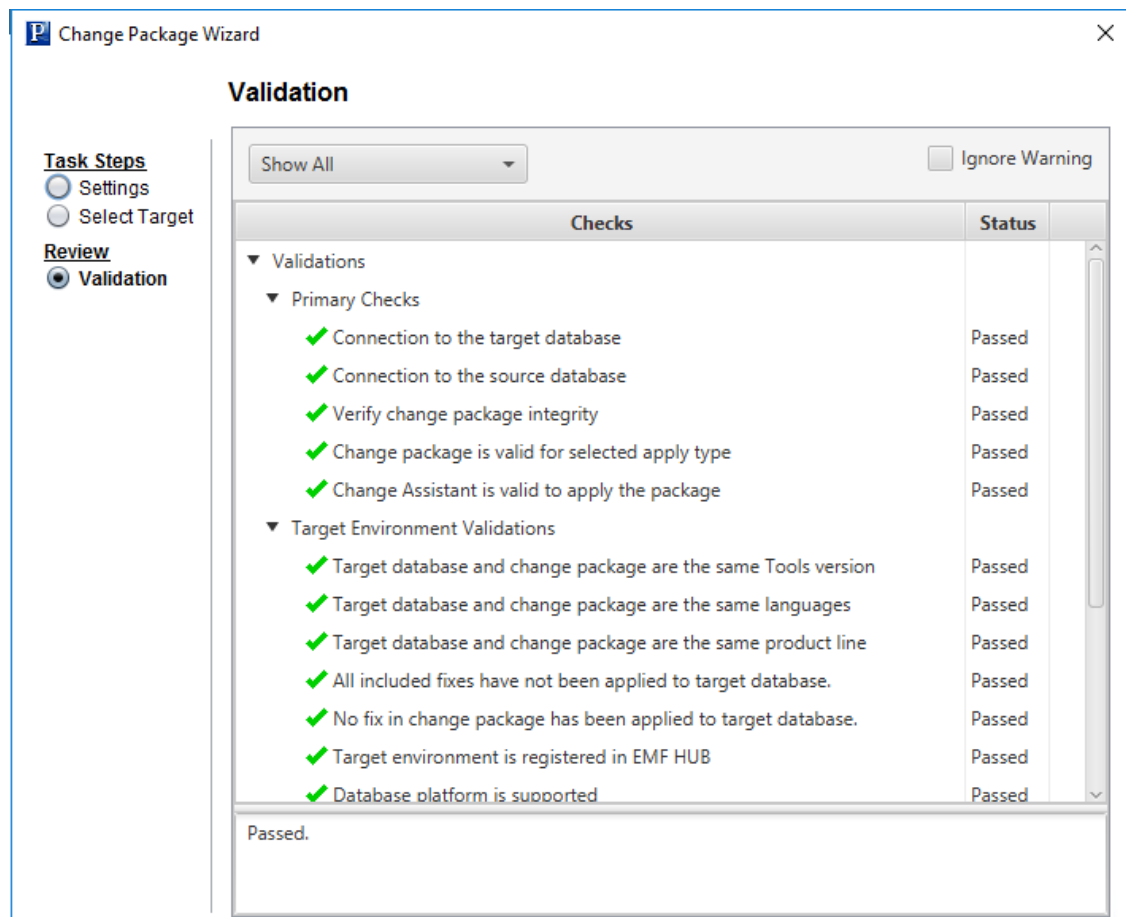
**PeopleTools Patches**

| Select                           | Package Name | Description                          | Date            |
|----------------------------------|--------------|--------------------------------------|-----------------|
| <input checked="" type="radio"/> | PATCH858     | PTP Package Containing 145 Update(s) | 2020-01-07-2... |

**Validation**

Change Assistant will check the connectivity to the target database, validate the PTU, and validate the target environment.

This example illustrates the fields and controls on the Validation page.



### PeopleTools Upgrade Job

When you click Finish on the Summary page, the PeopleTools upgrade job is created and opens. The first step is usually a manual stop.

For more information on running Change Assistant Jobs, see [Running the Upgrade Job](#)

## Creating and Applying Tools Delta Package

Since PUM supports multiple PeopleTools releases it is necessary for PUM to handle shape differences that may exist between different PeopleTools releases. There are 2 types of Tools dependencies:

- **Hard Dependencies** - The object will not work on a lower release and is therefore stripped from the change package definition.
- **Soft Dependencies** - Some of the attributes of the object are stripped in order to work on the lower release.

When the customer does upgrade to the newer PeopleTools release, any previously applied updates that contained soft dependencies need to be re-applied with the associated post-requisites to add back the attributes or objects that were stripped away when the updates were applied in the old release. The Tools Delta Package option in the PeopleSoft PIA application is used to create this change package.

## Prerequisites

You will use the Change Assistant Update Manager > Define or Create a New Change Package action to create and apply the change package. Before you can select this action, the following prerequisites must be configured and installed:

1. Download the latest PeopleSoft Update Image (PI) from My Oracle Support and install it locally.  
See [Installing PeopleSoft Update Image](#)
2. Configure the Microsoft Windows client running Change Assistant.  
See [Configuring the Microsoft Windows Client Running Change Assistant](#)
3. (Optional) Configure Environment Management Framework for your target environment, if you want to use the file deploy feature.  
See [Configuring the Environment Management Hub](#)
4. (Optional) Start EMF if you plan to use the file deploy feature.  
See [Running the Environment Management Hub](#)
5. Define the PUM Source and EM Hub.

### Note

For the PeopleTools Upgrade these options were skipped when the original configuration for Change Assistant was completed. Depending on the PeopleSoft Image downloaded and installed, you may need to remove Change Assistant and install the version delivered with the PeopleSoft Image. After installing a new version of Change Assistant, you will need to set up Change Assistant.

## Defining the PUM Source and EM Hub

If you are using the same version of Change Assistant that was used for the PeopleTools upgrade, follow these instructions. If you installed a different version of Change Assistant, follow the instructions in [Configuring Change Assistant for Update Manager](#).

To configure Change Assistant options:

1. In Change Assistant, select Change Actions.
2. Select Update Manager and click Finish.
3. Select Tools, Options.
4. Verify that the information on the General page is correct.

### Note

PS\_HOME will be the new release of PeopleTools.

5. Select the PUM Source tab.
  - a. Select Define PUM Source.
  - b. Click Create and define the PUM source database.

See [Defining Databases](#)

- c. Select the drive that you mapped to the pi\_home directory when you configured the Microsoft Windows client.
- d. Enter the PUM Source PIA URL.

6. (Optional) Select the EM Hub tab.

You must have EMF configured and running before defining the EM Hub.

- a. Select Configure EMHub For File Deploy.
- b. Enter the Server Host Name.
- c. Enter the Server Host Port.
- d. Enter the Chunk Size.
- e. Enter the Ping Interval.
- f. Select the SSL details. The options are None (Allowed List), Server Certificates Only (Allowed List), and Client and Server Certificate.

For details, see [Selecting Update Manager Action](#)

- g. Select the keystore file and then enter the keystore password.

You can select keystore file when connecting to EM Hub using two-way SSL.

- h. Select the truststore file and then enter the truststore password.

You can select truststore file when connecting to EM Hub through HTTP connection or when using two-way SSL for secure connections.

- i. Click Ping.

A successful ping will return Packets: Sent = 3, Received = 3, Lost = 0.

- j. Click the View button to display the Environment Management Hub Summary.

Select the Additional tab.

Verify that the information on the Additional page is correct.

7. Click OK.

## Creating the Tools Delta Package

To create the tools delta package:

1. Select Tools, Define Change Package.
2. Click the button Click Here to Open a Browser and Connect to the PUM Source Database.
3. Sign on.
4. Select PeopleTools, Lifecycle Tools, Update Manager Dashboard, Select Target Database.
5. If you only have one target database defined, the target database is selected by default.
6. Select Define Change Package, Tools Delta Package.
7. On step 2, enter a Package name and description, then click Next.
8. On step 3, enter the From Tools Release value in the format <release>.<patch> for example 8.53.12 (PeopleTools release 8.53 patch 12). The new PeopleTools release/patch number for the target database is displayed in the To Tools Release field.
9. Click Next. For Tools Delta packages step 4 is skipped.

10. Step 5 in the Define Change Package wizard is displayed showing all the bugs that will be included in the change package.

**Note**

This package may also contain additional bugs that you have not applied to the target database.

11. Click Next.  
The change package definition is created and you can return to Change Assistant to apply the change package.
12. Sign off and close the browser.
13. Return to Change Assistant and select Tools, Create Change Package. The package you just created on the PUM source should be at the top of the list. Select the change package.

**Note**

If you closed Change Assistant, launch Change Assistant and select Tools, Create a Change Package.

14. If you would like to apply the package when it is created, select the Proceed to Apply Change Package Wizard after Package Creation checkbox.
15. Click Finish.

## Applying Tools Delta Change Package

To apply the tools delta package:

1. In Change Assistant, select Tools, Apply Tools Delta Package.
2. Select the change package using the drop down. Only tools delta change packages are available.
3. Select *Initial Pass*.  
By default All Steps is selected.
4. Click Next.
5. Select the target database.

**Note**

Use the Create button to create the target database if it has not been previously created. See [Defining Databases](#) and [Defining Target Database](#)

6. Click Next.
7. Change Assistant will connect to the target database and validate the environment. The Validation page will then be displayed.
8. Click Next.

9. The Apply Summary is displayed, click Finish.  
Change Assistant will begin building the Change Assistant job.
10. The Update job will be created and open in Change Assistant.

# Defining and Applying Translations Fixes

## Understanding Translation Fix Packs

The Translations organization, from time to time, will review existing/ previously defined and delivered translations, and determine that a revision to that translation is required. This is a standalone review process that:

- is not directly linked to fixes or features being delivered by the applications.
- may include changes to objects that have not changed since Product GA.
- is language specific, in that each language is reviewed separately and the content of each language deliverable can and is likely to be unique.

The result and content of this translations process is referred to as a Translations Fix Pack (TFP).

The Translations Delta Package component is used to select the Translations Fix Pack(s) to include in a Translations Delta Package (TDP).

## Defining Translations Delta Package

To define a translation delta package:

1. Select PeopleTools, Lifecycle Tools, Update Manager, Update Manager Dashboard.
2. Expand the Select Target Database folder and click on the database name.
3. Expand the Define Change Package folder and select Translations Delta Package.
4. This launches the Define Translations Delta Package Wizard starting at step 2. Enter a name and description for the package.

### Note

Step 1 is only displayed when no target databases have been uploaded. The database name you selected in step 2 above is used.

5. Click Next.
6. On step 3, select the languages.
7. Click Next. Step 4 is skipped for translation delta packages.
8. Step 5 will display all bugs meeting the language criteria.
9. Click Next.
10. When you transition into Step 6 the change package definition is complete.
11. Return to Change Assistant to create the package.

# Define Translations Delta Package Wizard Step 2 of 6

Navigation:

After selecting the target database in the Update Manager Dashboard, expand the Define Change folder and select Define Translation Delta Package.

The second step is to enter the package name and description.

This example illustrates the fields and controls on the Define Translations Delta Package Wizard step 2 of 6 page. You can find definitions for the fields and controls later on this page.

Translations Delta Package

Step 2 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1

2

3

4

5

6

Previous

Next

Enter Change Package Name

The change package name must be unique for the user-selected target database.

Database

H92TGT56

PeopleTools Release

8.56.09

Description

Package Name

Action

☒ Create

☐ Edit

Package Name

TRANS\_PKG

Package Description

Example translations delta package

| Field or Control    | Description                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Package Name        | Enter a name for your translation delta change package. To edit an existing change package, select the Lookup button. The list of change packages that can be edited is restricted as follows: <ul style="list-style-type: none"><li>Packages created by the current user.</li><li>Packages created for the currently selected target database.</li><li>Packages which have been defined but have not been created.</li></ul> |
| Package Description | Enter a description for the change package.                                                                                                                                                                                                                                                                                                                                                                                   |

# Define Translations Delta Package Wizard Step 3 of 6

Use the Select Search Method page to select the language or languages to update.

 **Note**

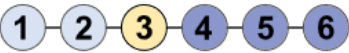
If the target database is English only, nothing is displayed since you do not need a translation fix pack.

This example illustrates the fields and controls on the Define Translation Delta Package Wizard Step 3 of 6 page.

**Translations Delta Package**

Step 3 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.



[Previous](#) [Next](#)

Select Search Method

|                     |                                                                                            |                            |         |
|---------------------|--------------------------------------------------------------------------------------------|----------------------------|---------|
| <b>Database</b>     | H92TGT56  | <b>PeopleTools Release</b> | 8.56.09 |
| <b>Description</b>  |                                                                                            |                            |         |
| <b>Package Name</b> | TRANS_PKG                                                                                  |                            |         |

**Language Options**

Select Language(s) to Update

**Select**

<

# Define Translations Delta Package Step 5 of 6

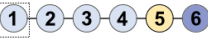
Step 5 will display the bugs to be included in the translation delta package.

This example illustrates the fields and controls on the Define Translation Delta Package Step 5 of 6 page.

**Translations Delta Package**

Step 5 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.



[Previous](#) [Next](#)

**Review Bugs**

Review bugs to be included in the package. Click on Next to create Change Package.

|                     |                                                                                              |                            |         |
|---------------------|----------------------------------------------------------------------------------------------|----------------------------|---------|
| <b>Database</b>     | H92TGT56  | <b>PeopleTools Release</b> | 8.56.09 |
| <b>Description</b>  |                                                                                              |                            |         |
| <b>Package Name</b> | TRANS_PKG                                                                                    |                            |         |

 **Included Bug Fixes**

<

For details on the grid columns see [Define Update Package Wizard Step 5 of 6](#)

## Define Translations Delta Package Wizard Step 6 of 6

When you transition into Step 6 the change package definition is complete.

This example illustrates the fields and controls on the Define Translation Delta Package Wizard Step 6 of 6 page.

### Translations Delta Package

Step 6 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.



Previous

Next

Done Identifying Bugs

|                     |              |                            |         |
|---------------------|--------------|----------------------------|---------|
| <b>Database</b>     | H92TGT56     | <b>PeopleTools Release</b> | 8.56.09 |
| <b>Description</b>  |              |                            |         |
| <b>Package Name</b> | TRANS_PKGTDP |                            |         |

#### Summary

Processing Completed Successfully

- > Project Definition TRANS\_PKGESP Created
- Project Definition TRANS\_PKGFRM Created
- Project Definition TRANS\_PKGTDP Created
- > Change Assistant Template Definition Created
- > [Review Package Definition](#)

**Return to Change Assistant to begin packaging.**

Each language is processed separately. A project definition is created for language, with suffix indication the language. The projects will be combined into a single change package with separate steps by language. The Change Package Type is *TDP*.

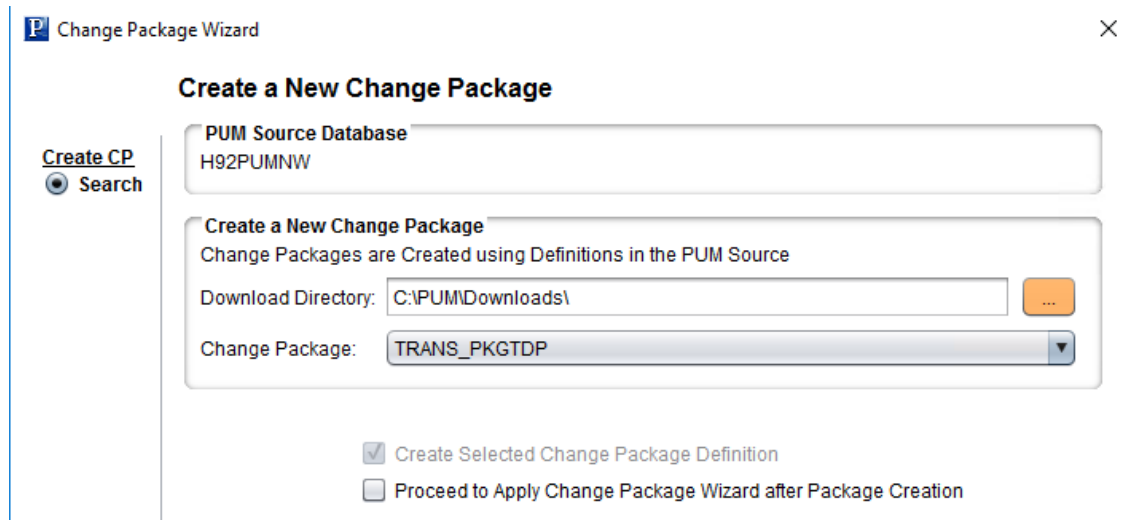
## Creating Translations Delta Package

After defining the translations delta package, return to Change Assistant to create the package.

To create the Change Package in Change Assistant:

1. Select Tools > Create Change Package.
2. Select the package name from the drop-down list box.
3. Click Finish.

This example illustrates the fields and controls on the Create a New Change Package page. You can find definitions for the fields and controls later on this page.



If you select the Proceed to Apply Change Package Wizard after Package Creation, Change Assistant will launch the wizard. See [Applying Translations Delta Package](#)

## Applying Translations Delta Package

To apply the translation delta package:

1. In Change Assistant, select Tools, Change Actions.
2. Select Update Manager and Click Next.

### Note

If you are already in the Update Manager action, select Tools, Apply Translation Delta Package.

3. Select Apply Translation Delta Package and click Finish.
4. Select the download directory where the change package was created.

This example illustrates the fields and controls on the Change Package Settings page.

**Change Package Wizard**

**Change Package Settings**

**Task Steps**  
☒ Settings

PUM Source Database  
H92PUMNW

Download Directory: C:\PUM\Downloads\ ...

Change Package: updTRANS\_PKGTDP.zip

**Apply Type**

☒ Initial Pass

☒ All Steps

☐ Source Steps Only

☐ Target Steps Only

☐ Subsequent Pass

☐ Move To Production

Synchronize Target Metadata (Requires Source) ☒ Yes ☐ No

5. Select the translation delta change package to apply. Only translation delta packages are available in the drop down. The package name will end with TDP.

6. Select *Initial Pass*.

By default All Steps is selected. Change this value if you choose to decouple the source and target steps.

**Note**

For information on Apply Type see [Understanding the Apply Update Process](#)

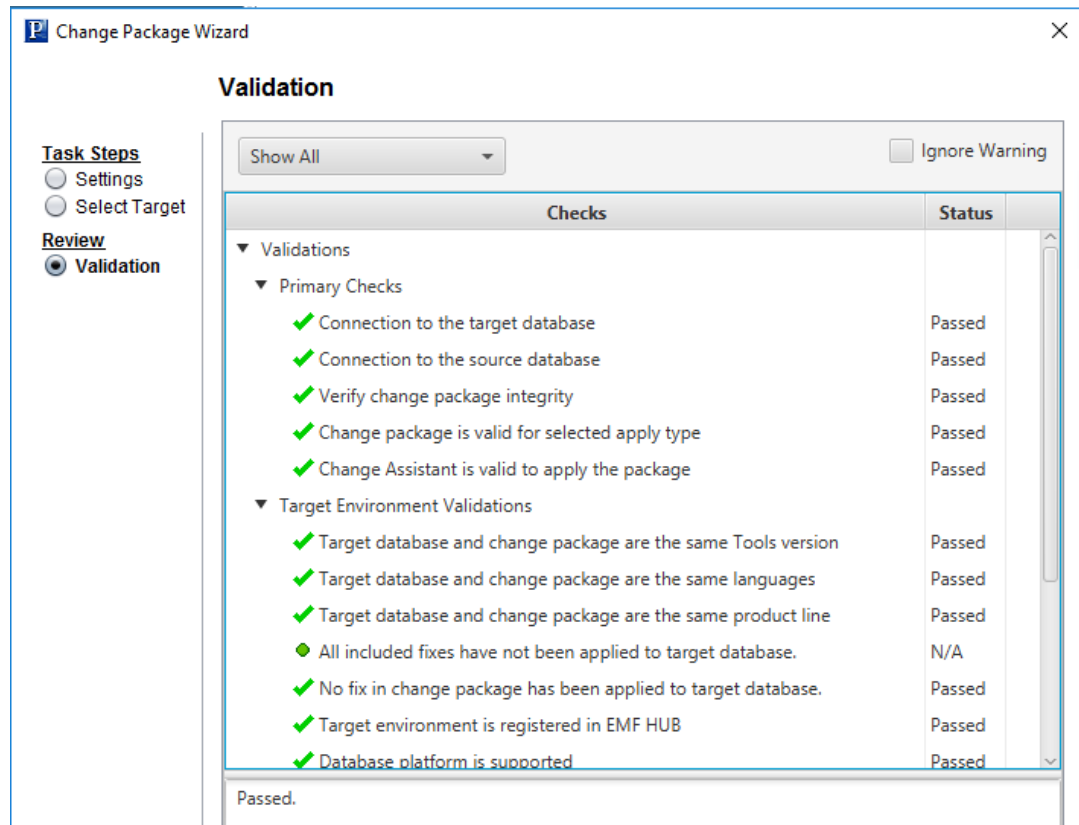
7. Click Next.
8. Select the target database.

**Note**

Use the Create button to create the target database if it has not been previously created. See [Defining Databases](#) and [Defining Target Database](#)

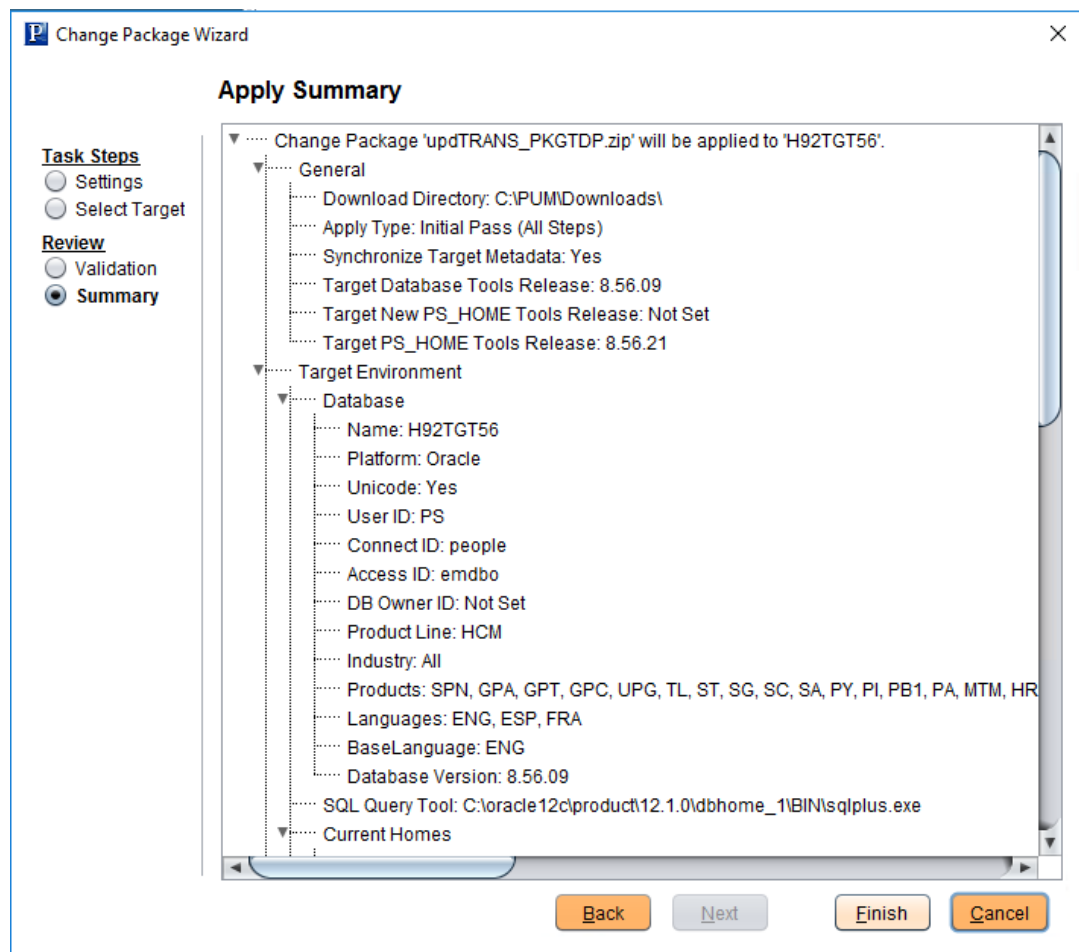
9. Change Assistant will connect to the target database and validate the environment. The Validation page will then be displayed.

This example illustrates the fields and controls on the Validation page.



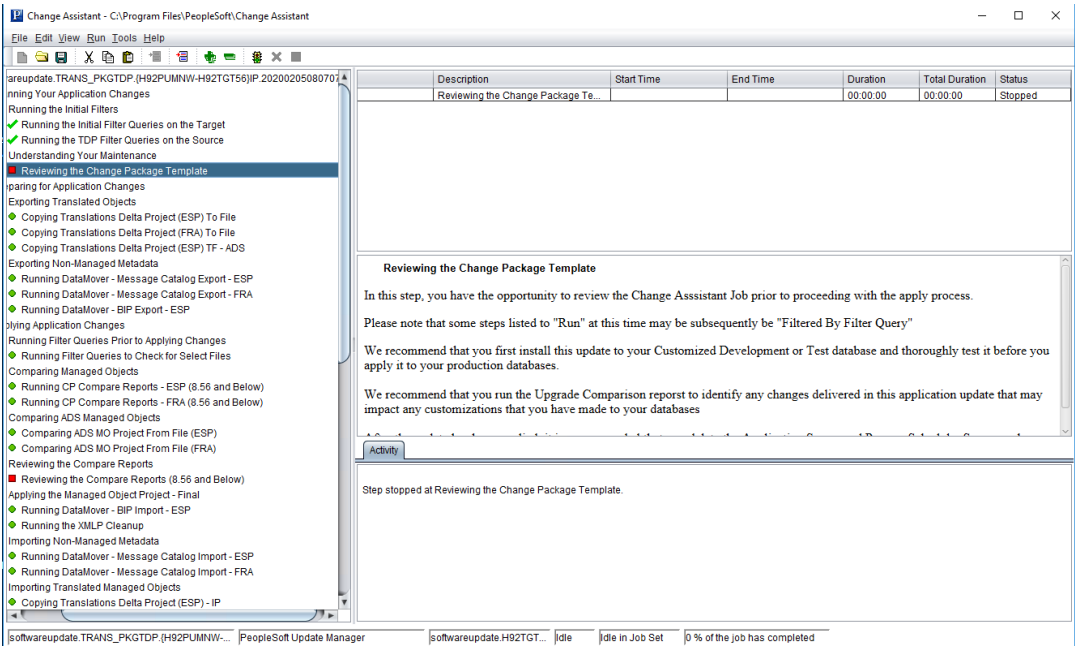
10. Click Next.
11. The Apply Summary is displayed, click Finish.

This example illustrates the fields and controls on the Apply Summary page.



12. Change Assistant will begin building the Change Assistant job.
13. The Update job will be created and open in Change Assistant.

This example illustrates a Translation Delta Project Job.



# Using Apply Update Action

## Discovering Updates Using My Oracle Support

If the current application level of PeopleSoft product is not PUM-enabled, it is necessary to use My Oracle Support to discover updates and then download them to your local system.

1. Log onto My Oracle Support (MOS).
2. Select Patch and Updates tab.

For detailed instructions on using MOS for patches and updates, refer to

[My Oracle Support Patches and Updates for PeopleSoft Products \[ID 1465172.1\]](#)

## Downloading Updates From My Oracle Support

When you select an update to download, you will be downloading the change package. You will need to set up a download directory on your local machine to store all of your downloaded change packages. When you are ready to apply the change packages, you will reference this directory from Change Assistant.

### Downloading a Single Patch

To download a patch from the Patch Details page:

1. In the Patch Search Results table, click the patch name link to view the patch details page.
2. Click Download.
3. Select the Include Prerequisites check box to list all the prerequisite change packages.
4. In the File Download window, click the patch file name link and select Save.

The context bar for each patch provides a download option. Note that you can select multiple patches from a list by using Ctrl or Shift.

### Downloading Multiple Patches From My Oracle Support

To download more than one patch:

- From the patch search results, click anywhere in the row except a link to select that row. Use Ctrl or Shift to select multiple rows.
- Choose the Download button from the context bar.
- Click each file and save it.

### Using WGET Options

WGET is a UNIX download utility. The WGET options enable you to create a WGET download script that you can save as a file or copy to the clipboard.

**Note**

The WGET download script is intended for advanced users. In most cases, there are no messages to indicate that an error has occurred. Before using the WGET script, you should be familiar with the WGET command and WGET log files. You should also be familiar with UNIX file management, know how to edit, delete, and copy UNIX files, create and edit shell scripts, change execute privileges in UNIX, and understand HTTP error codes. Alternatively, use a download manager to download multiple patches. If you do this, you must maintain an active My Oracle Support session while you download the patches.

For details on using the WGET options refer to

[Patches and Updates](#)

## Reviewing the Updates Change Log

Using the Environment Management hub, Change Assistant evaluates the change log status of the available environments to identify if prerequisites have already been applied before allowing you to apply a new change package.

To review the change log for an environment, or to confirm whether particular update has been applied, you use the following PeopleTools utilities:

| Utility                  | Navigation                                                                                                                      |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Updates - View All       | <b>PeopleTools</b> , and then <b>Utilities</b> , and then <b>Administration</b> , and then <b>View All Updates</b>              |
| Updates by Release Label | <b>PeopleTools</b> , and then <b>Utilities</b> , and then <b>Administration</b> , and then <b>View Updates by Release Label</b> |
| Updates by Update ID     | <b>PeopleTools</b> , and then <b>Utilities</b> , and then <b>Administration</b> , and then <b>View Updates by Update ID</b>     |

Only those application releases in which *all* of their application updates were delivered in change packages are considered to have reliable change log data. Application updates that you applied that were not delivered as change packages are probably not included in your change log. Therefore it's possible that your change log does not match your actual maintenance history. In these cases, you should apply change packages individually—select only one change package in the Update Wizard. Then, you can verify whether the list of missing prerequisites reported by Change Assistant accurately reflects your maintenance history.

If your target environment is at an application release level that is not considered to have reliable change log data, Change Assistant may falsely report that a prerequisite is missing from this environment. If this is the case, *do not* add the supposed missing update to your current apply list, as this would reinstall the update (not recommended).

Therefore, if your target environment may have unreliable change log data, review the list of missing prerequisites found by Change Assistant and if any of these updates are known to have been previously applied to your target environment, manually enter these updates to your change log first so that Change Assistant can accurately determine that these prerequisites

have been satisfied. If you need to add entries to your change log, you will have to restart the apply change packages process.

## Configuring Change Assistant for Apply Updates Action

Before you can apply an update, you need the following:

1. Change package in your download directory.

For non-PUM enabled applications, this is the change package downloaded from MOS. See [Downloading Updates From My Oracle Support](#)

For change packages created for your own customizations, place the change package in the download directory. See [Creating a Change Project](#)

2. Environment Management Framework must be configured and running.

See [Configuring the Environment Management Hub](#)

## Selecting Apply Updates Action

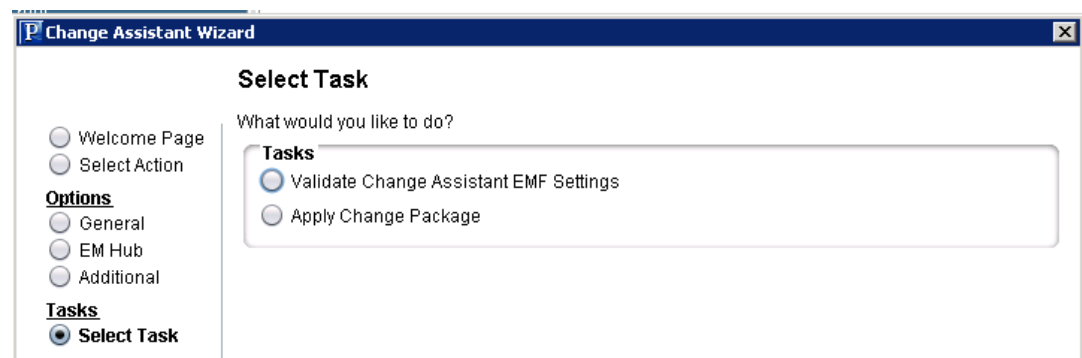
To start Change Assistant: and apply updates:

1. Select Start, Programs, PeopleSoft Change Assistant 8.5x.xx, wherex.xx refers to the release/patch number.
2. Depending on your preferences, you may or may not see a Welcome dialog box. If the Welcome dialog box is displayed, click Next.

The Select Action page is displayed.

3. Select Apply Updates and click Next.

This example illustrates the fields and controls on the Select Task page for Apply Updates. You can find definitions for the fields and controls later on this page.



4. The options required for Apply Updates are shown on the left side of the page. If the options have not been defined, Change Assistant will guide you through the set up pages. Click each option to ensure it is properly configured for this action.

### General Options

This example illustrates the fields and controls on the General Options page. You can find definitions for the fields and controls later on this page.

| Field or Control                              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum Concurrent Processes</b>           | Specifies the maximum number of processes that can be executed concurrently on the local machine. The default is 1.                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>PS Home Server Starting Port</b>           | Specify the port number for the first PS Home server.<br>Change Assistant uses this port number to communicate with Change Assistant PS Home servers. The default starting port number is 6151. If you enter a port number that is already in use, you see an error message. You must change to a port number that is not in use, and then restart Change Assistant for the change to take effect.                                                                                                                                                                                   |
| <b>PS Home Server Maximum Instances</b>       | Enter a number between 1 and 10 for the maximum number of PS Home servers.<br>Use this value for environments with more than one PS_HOME. For each server instance, Change Assistant increments the PS Home Server Starting Port number by 1 up to the maximum number of instances. For example, with a PS Home Server Starting Port value of 6151 and a PS Home Server Maximum Instances value of five, the port numbers would be 6151, 6152, 6153, 6154, and 6155. The default is 5.<br>If you change this value, you must restart Change Assistant for the change to take effect. |
| <b>PS Home, PS App Home, and PS Cust Home</b> | Enter the full path for your PS home directories.<br><b>Note:</b> Specify the PS_HOME location you used to install Change Assistant.                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

| Field or Control          | Description                                                                                                                                                                                         |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Staging Directory</b>  | Enter the directory in which you would like to stage all the Change Assistant update files. This is the location that Change Assistant will store files to be used during the apply update process. |
| <b>Output Directory</b>   | Enter the directory in which you want the log files generated by the update process to reside.                                                                                                      |
| <b>Download Directory</b> | Enter the full path of the location to where you downloaded the update change packages.                                                                                                             |

### EM Hub Options

This example illustrates the fields and controls on the EM Hub Options page. You can find definitions for the fields and controls later on this page.

| Field or Control                       | Description                                                                                                                                                                                                          |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Configure EMHub For Deploy File</b> | Select this checkbox if you want to use EMHub for file deploy.<br><b>Note:</b> In order to apply traditional updates (non-PUM enabled) EMF must be configured and running.                                           |
| <b>Server Host Name</b>                | The hostname of the server in which the Environment Management HUB resides.                                                                                                                                          |
| <b>Server Host Port</b>                | Indicates the port in which to connect to the Environment Management hub.                                                                                                                                            |
| <b>Chunk Size</b>                      | Used for deploying files during a software update. Default is 1024 * 1024 bytes. Typically this does not need to be changed unless there are a significant number of files greater than 1024KB in a software update. |

| Field or Control     | Description                                                                                                                                                                                                      |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ping Interval</b> | Ping interval is in milliseconds for Change Assistant to contact the hub for new messages.                                                                                                                       |
| <b>Ping</b>          | Click to verify a valid server URL. If you see <i>Service is off</i> to the right of this button, then you must correct the server URL and ping again until you see <i>Service is on</i> .                       |
| <b>View</b>          | Click to display the list of all PeopleSoft components discovered and registered in the Environment Management hub.<br><b>Note:</b> This button is visible only if your display is set to Windows Classic style. |

### Additional Options

This example illustrates the fields and controls on the Additional Options page. You can find definitions for the fields and controls later on this page.

**Change Assistant Wizard**

**Additional Options**

☐ Welcome Page  
☐ Select Action  
**Options**  
☐ General  
☐ EM Hub  
☒ **Additional**  
**Tasks**  
☐ Select Task

**Notification Settings**

☐ Send Email Notifications  
 SMTP Server:   
 Port:   
 Send To:   
 Return Address:

**Proxy**

Host:   
 Port:   
☐ Anonymous Proxy  
☐ Microsoft Proxy Server    Windows Domain:   
☒ Other Proxy Servers

### Notification Settings Section

| Field or Control                | Description                                                                                                                                                                                           |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Send Email Notifications</b> | Select this check box to receive email notifications if there are errors in the update process. Change Assistant also sends you a completion message when it encounters a Stop in the update process. |
| <b>SMTP Server</b>              | Enter the SMTP mail server from which you receive the error or completion messages.                                                                                                                   |
| <b>Port</b>                     | Enter the port from which you want to access the email.                                                                                                                                               |
| <b>Send To</b>                  | Enter the address to which you want the email sent.                                                                                                                                                   |
| <b>Return Address</b>           | Enter the email address of the sender. Use this to identify who sent the notification.                                                                                                                |
| <b>Test</b>                     | Validates that email is sent to the designated recipients and is working correctly.<br><b>Note:</b> Ensure that your SMTP server is installed and configured correctly.                               |
| Proxy Section                   |                                                                                                                                                                                                       |
| Field or Control                | Description                                                                                                                                                                                           |
| <b>Host</b>                     | (Optional) Enter the name of the proxy server if you want to run Change Assistant behind the firewall using a proxy server.                                                                           |
| <b>Port</b>                     | (Optional) Enter the port number for the proxy server.                                                                                                                                                |
| <b>Anonymous Proxy</b>          | Indicates that you are using a proxy server that does not require authenticated connections.                                                                                                          |
| <b>Microsoft Proxy Server</b>   | Indicates that you are using a proxy server with Windows authentication.                                                                                                                              |
| <b>Windows Domain</b>           | The network domain in which the system runs.                                                                                                                                                          |
| <b>Other Proxy Servers</b>      | Indicates you are using non-Microsoft proxy servers.                                                                                                                                                  |

## Validating Change Assistant Settings

Before applying non-PUM updates, you should validate your settings.

Change Assistant validates settings by:

- Locating valid SQL query tools required to run SQL scripts.
- Testing the Environment Management hub and ensuring that Change Assistant can communicate with it.

You can also print a summary of your environment, which can facilitates the diagnosis of problems by Oracle Global Customer Support.

To validate your environment:

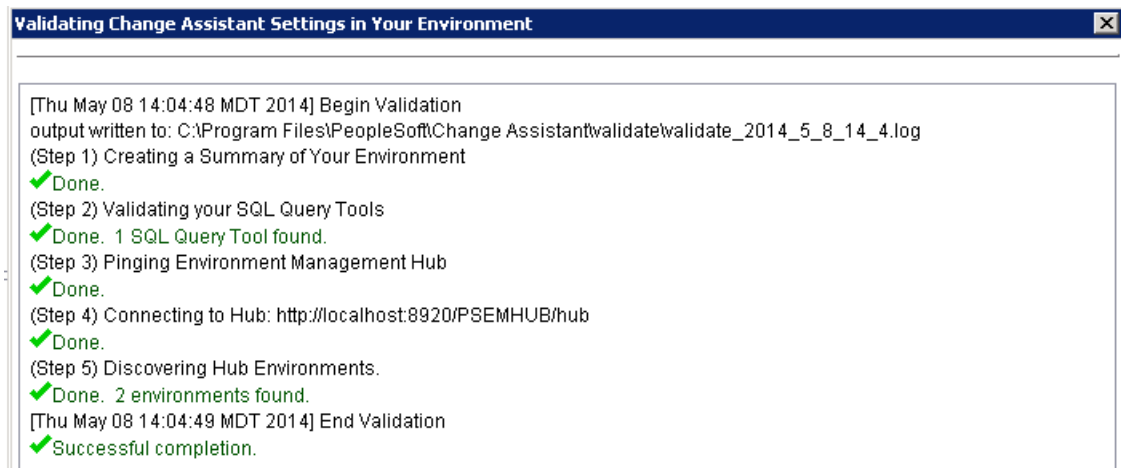
1. From the Select Task page, select Change Assistant Validate EMF Setting and click Finish or from the menu bar, select Tools, Validate.

2. Click **Start Validation**.
3. When the validation process has completed, a completion message appears.
4. If any of the steps were unable to complete successfully, open the log file to determine the cause.

Click **View Log** in the lower part of the screen to see more details regarding individual steps of the validation.

You can also select the Validate Change Assistant EMF Settings radio button from the Change Assistant Wizard when the action Apply Updates is selected.

This example illustrates validation results.



#### Note

If you use proxy servers, the system will ping those and prompt for proxy server user ID and password.

## Working with Templates

When applying a change package, Change Assistant uses the update template embedded in the PeopleSoft-provided change package. You can use the update template to automate the majority of the job steps. The primary difference between a template and a job is that a template is a composite of the update process, whereas a job is a set of filtered steps for a given target environment within a template.

When you apply updates by using the Apply Update action with the Apply Change Packages option, Change Assistant automatically loads the template into the Change Assistant internal storage system. You can add additional chapters, tasks, and steps to the template.

**Note**

Any changes that you make to the imported template won't affect the original template that you downloaded with the change package. If you want to overwrite the original template with your changes, save the template and select **File, Export** to export it to the directory from which you downloaded it. You can also use the export function to make this modified template available to others.

In order for others to use the template that you create or modify, you need to export it from Change Assistant.

To export a template:

1. Select **File**, and then **Open Template**.
2. Select **File**, and then **Export Template**.  
The Export Template dialog box appears.
3. Navigate to the folder in which you want to save the template.
4. Enter the name of the template.

**Note**

If you want to overwrite the original template that you downloaded, enter the original name of the template.

5. Click **Save**.

**Note**

To ensure consistency with shared templates, the system includes all template and step properties in the exported XML file, regardless of whether the property value differs from the default value.

## Setting the Documentation Directory

To view the documentation associated with a template, you need to set the documentation directory first, so that Change Assistant can locate the files. Once set, you select a chapter, task, or step in the template or job tree, and Change Assistant displays the corresponding upgrade documentation in the documentation pane.

To set the documentation directory:

1. Select **Edit, Set Documentation Directory**.
2. Enter or browse to the folder where you placed your upgrade documentation HTML files.
3. Click **OK**.
4. Save the template.

**Note**

The saved template will include the documentation path information.

See [Working with Embedded Documentation](#).

## Applying Updates To A Target Environment

The apply process enables you to apply one or more change packages to the target environment. A typical change package apply process, would be as follows:

1. Apply the change package without compare to your demonstration environment.  
Since the demonstration environment does not contain any customizations, there is no need to compare. This brings the demonstration environment current on the specific maintenance, overwriting the new maintenance into the demonstration environment.
2. Apply the change package to the first customized environment by using the 'Apply with Database Compare/Copy' option.  
This uses your demonstration database as the source and this customized environment as the target. This process augments the normal Change Assistant template/job in order to compare the change project from the demonstration database to the target database.
3. Use the PeopleTools database compare and copy utilities to reconcile the new changes from PeopleSoft with your customizations, just as you do during an upgrade.
4. Once the reconciled or modified change package is created, it can then be applied without compare into all other customized environments, assuming these customized environments are the same.

To apply change packages to the target environment:

1. The Environment Management Hub must be up and running.
2. In Change Assistant, select Tools, Change Actions.
3. Select Apply Updates.
4. Select Apply Change Packages and click Finish.
5. Apply Change Packages Wizard starts.

You use the Apply Change Packages wizard to select the appropriate settings for a change package.

This example illustrates the fields and controls on the Apply Updates to Target Environment page. You can find definitions for the fields and controls later on this page.

**Apply Change Packages**

**Apply Updates to Target Environment**

---

What is the target of your update?

If you are applying to a Demo environment, or are applying a Change Package that already contains all updates and customizations, choose the 'Apply Automatically Without Compare' option.

If you are applying to an environment where additional customizations exist, choose the 'Apply With Compare' option.

Pick your target Environment:

☒ Apply Automatically Without Compare

☐ Apply with Database Compare/Copy

| Field or Control                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Apply Automatically Without Compare</b> | <p>Applies the change package to the target environment and copies the project without initiating any compare reports or analysis. Select this option if you are:</p> <ul style="list-style-type: none"> <li>Applying a PeopleSoft-delivered change package to a PeopleSoft demo environment.<br/>Because you have not made any customizations to a demonstration environment, there is no need to compare objects.</li> <li>Applying a modified change package to your own environments, as in development, test, or production environments.<br/>The "modified change package" refers to a new change package created using the Apply with Database Compare/Copy option. This modified change package is the result of the Change Management process where you have reconciled changes made in the PeopleSoft maintenance with your customizations. Once the modified change package has been created for the first customized environment, there is no need to compare additional environments. This assumes that the additional environments contain the same metadata. Once you have created this modified change package, it can be applied without compare to the remaining customized environments.</li> </ul> <p>See <a href="#">Apply Without Compare</a></p> |

| Field or Control                        | Description                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Apply With Database Compare/Copy</b> | Select this if you are beginning the process of migrating a PeopleSoft-delivered change package to your customized environments. In this case, you are applying to a customized environment, and this will require the use of PeopleTools' change management tools, such as compare and copy.<br>See <a href="#">Apply With Compare or Copy</a> |

**Note**

When applying multiple updates, a job set may not move on to the next update if there are steps in the current update with a status of *Warning* rather than *Success*. In this situation, review the logs for the steps with warnings and take any corrective measures, as needed. Then change the status of these steps from *Warning* to *Complete* to proceed to the next change package in the job set.

## Apply Without Compare

This section describes the apply process after you have selected the **Apply Automatically without Compare** option.

To apply a change package without compare:

1. On the **Apply Updates Using the Change Impact Analyzer** screen indicate whether you want to include Change Impact Analyzer analysis.  
Typically, system administrators use Change Impact Analyzer to help devise a test plan based on the impact of changes.
2. On the **Select a product line release** screen indicate product line associated with the target environment.
3. On the Select Target Environment screen, select the database name associated with the target environment.  
All PeopleSoft web servers, application servers, Process Scheduler servers, and so on, are associated with one, and only one, environment, which is determined by the database. Change Assistant will re-validate the environment.
4. On the Environment Preparation screen acknowledge that you have performed the recommended pre-update procedures.
5. On the **Select File Servers** screen, select the file servers that are used in conjunction with the target environment.

**Note**

The system uses this file server selection only as a destination to deploy files during the apply process. The file server specified is not used for execution purposes. The executables used to run steps during the apply process are those specified in the PS\_HOME edit box on the Change Assistant Options page.

File server installations are not necessarily tied to any one environment, unlike application servers, web servers, Process Scheduler servers and database servers, which are associated with one, and only one, database environment. On the other hand, a single file server could be used for multiple databases, and likewise, there could be multiple file servers in your PeopleSoft implementation all supporting different application versions. So, it is necessary to prompt you to select the appropriate file server installation.

6. On the **Enter user name and password** screen, enter the user credentials required for Change Assistant to be authenticated.

**Note**

For the Apply without compare, only the target database is required. For the Apply with compare, credentials for both the target and source are required.

7. On the **Select Download Directory** screen, confirm the location of the change packages you intend to apply.
8. On the **Select Change Packages** screen, select change packages to install.  
You can use **Select All** to select all the available change packages listed on the screen.
9. Click **Next** after you've selected your change packages.

At this time, Change Assistant examines all the selected change packages to determine if any of them have previously been applied.

**Note**

If an *Unable to read change package* error appears because of an unsupported change package version number, then you must install the latest release of Change Assistant.

10. If the change package has already been installed, you will be prompted to select one of the following options:
  - Do not reapply the change package.
  - Review each change package individually, with option to apply.

If you choose to review each change package individually, you will be prompted either not to reapply the change package or to reapply the change package (not recommended).
11. Select the options, then click **Next**.

If none of the translated languages included in a change package applies to the languages installed in the target environment, you will be prompted to select one of the following options:

- Remove these change packages from my installation list.
- Review each of these change packages individually, with option to apply.  
If you elect to review each change package individually, you will be prompted either not to apply the change package or to apply the change package (not recommended).

12. After you've made your selection, Change Assistant searches for post-requisites. If there are post-requisites that are not listed in the apply list, you will be prompted to select one of the following options:

- Apply these additional change packages.

The additional change packages are added to the list of selected change packages.

**Note**

This option is enabled only if the additional change packages are already present in your apply directory.

- Remove the change packages that require post-requisites from my installation list.

13. Click **Next**.

Change Assistant searches for any missing prerequisites required by the selected change packages, and you will be prompted to make the same selections as in the previous step.

**Note**

If your target environment is at an application release level that is not considered to have reliable change log data, Change Assistant may falsely report that a prerequisite is missing from this environment. If this is the case, it is very important that you *not* elect to add the supposed missing update to your current apply list, because this would reinstall the update, which is not recommended. Therefore, if your target environment is considered to have unreliable change log data, it is very important that you review the list of missing prerequisites found by Change Assistant. If any of these updates are known to have been previously applied to your target environment, you must first manually enter these updates to your change log so that Change Assistant can accurately determine that these prerequisites have been satisfied. If you need to add entries to your change log, you will have to restart the Apply Change Packages process.

14. After you have selected your option, click **Next**.

If one or more of the change packages you are applying includes the Build and Alter template steps, you will be prompted to select one of the following methods to apply the database changes.

- **Automatically:** Enables build scripts to be run as an automated template step.
- **Manually:** Enables the build script to be run as a manual template step.

15. If one of your selected changes packages will be executing a script that includes embedded question syntax that is supported by Change Assistant, you will be prompted to enter a runtime value for the script variables.

16. Click **Next** to display a screen where you confirm your selections—target environment and change packages to apply and number of manual steps, if any, for each change package.

17. On the **Apply Now** screen, consider the options presented before applying the change project.

| Field or Control        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Validate Now</b>     | <b>Note:</b> Before you initiate the apply update process, you can validate your environment connections to ensure all components are active.                                                                                                                                                                                                                                                                                               |
| <b>Review and Apply</b> | Enables you to review the entire job to make sure it is correct before running it against an environment.<br><b>Note:</b> If there are steps you don't want run or have already completed manually, you could set them to Complete while reviewing the job. For example, if you have already deployed some files manually to a certain PS_HOME, you could set that step to Complete to save time and avoid overwriting any custom settings. |
| <b>Begin Apply</b>      | Starts the update job.                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Apply With Compare or Copy

The interface of the Apply Change Packages wizard is similar to what you see with the Apply Without Compare option, however, the following steps are included.

- Compare project from the demo database to the development or copy of production database.  
Change Assistant will compare this project between the source database and the currently selected environment (target database).
- Examine the compare report step (a manual step).  
You must examine the compare reports generated to determine the appropriate action (for example, whether or not to copy the object from the source database to the target database).
- Copy project from the source database.  
Change Assistant copies the objects from the source database to the target database, based on the actions chosen.
- Extract the files from the delivered change package.  
Change Assistant will extract the current change package to a temporary location (<<staging directory>>/~ExtractedCP).
- Re-apply customizations.  
This is a manual step.
- Compare and merge files.  
This is a manual step.
- Export the project from the target database.  
Change Assistant will export (from the target database) the project containing customize objects to a temporary location (<<staging directory>>/~ExportedProject).

- Change Assistant creates a new change package in the download directory. The original change package is renamed to xxxxx.zip\_datetimestamp.

## Automatically Deploying Files to Different Servers

Change Assistant can automatically deploy files in a change package to different servers within an environment. If the job that is running while applying the change package includes a Deploy Files chapter and contains tasks and steps, that indicates to Change Assistant to deploy the files to the agents that are running in the environment.

While Change Assistant runs deploy file steps within the job, it will query the hub for the location to deploy the files. The query is based on the server, operating system, and database platform. If the query returned from the hub matches what was defined for the file reference in the change package, Change Assistant attempts to deploy the files to the agent running on the host machine.

Change packages provided by PeopleSoft applications, are configured to deploy multiple files of the same type within one step. This can improve performance, especially when a change package contains hundreds of updated files.

When files are deployed, the step's log file lists the host name and the type of server that match the file reference and the target path on the remote host.

If the Environment Management agent is not running at the time when Change Assistant is trying to deploy files, a warning message appears stating the inability to deploy the files. Other types of problems that may occur, such as lack of disk storage space, will result in step failure.

## Resuming Running Jobs

If there is a current apply job set, the Resume Running Jobs dialog box appears automatically when you start Change Assistant, run a job, or apply change packages (start a new apply).

Select **Cancel** to:

- Remove all jobs associated with the current apply job set that have not been run.
- If a job definition is open in Change Assistant and it does not belong in the current apply job set, the job definition remains open.
- If a template definition is open in the Change Assistant, regardless of whether or not it's used in the current job set, it will remain open.

Select **No** to keep the current apply job set and its associated jobs as they are, so that you can resume this apply job set later.

Select **Delete Job Set** to delete the current apply job set.

# Working with Change Packages (Traditional Update Only)

## Understanding Change Packages

Once you have your change project completed, you create a change package in Application Designer. Change packages are used to enable:

- PeopleSoft developers to package software updates and any prerequisites associated with PeopleSoft application updates.
- You to package your own system customizations into a change project, which is then used by the Change Packager and Change Assistant when migrating from one release or one environment to the next.

The process of using a change package is to:

1. Create a new project adding all new items for the application changes to the database for the update, identifying the project as a change project and setting the appropriate update IDs and prerequisites, if applicable.
2. Define the file reference definition(s), if necessary, for the individual files that need to be packaged with the project and the file type code.

### Note

Only projects that contain physical files (such as SQR or Excel files) need to include a file reference definition.

3. Generate the change package, which copies the project to a file, generates a Change Assistant template and documentation, creates the Data Mover scripts for non-managed objects, and packages the referenced files.
4. Manually update the Change Assistant template, if necessary, that is generated by the Change Packager.
5. Finalize the change package using the **Finalize Change Package** option, which performs validations on the package and produces the zip file.

The zipped archive files contain the change project and all its associated files.

6. Test the newly created change package.

## Creating a Change Project

In addition to identifying the project as a change project, if necessary, you will need to add a file reference definition to the project, which requires a file type code definition. A file reference is only necessary if there is a physical file that you want to execute or deploy or both when the change package is applied by Change Assistant.

This section discusses how to:

- Set project properties for a change package.
- Define the file type code.
- Create a file reference definition.
- Modify the upgrade definition type.

## Setting Project Properties for a Change Package

Before beginning to work with the Change Packager, you must identify the project you want to use as a change project. You do this in the Project Properties dialog box.

To create a change project and set project properties:

1. Create a new project.
2. Open the Project Properties dialog box.
3. Enter a **Project Description** and any pertinent comments for your internal tracking system on the General tab.

The system populates the information you enter here into the change log and the manifest.

4. Select **Change Project** on the General tab.

This enables the Update IDs and the Pre-Requisites tabs. Here you identify the lead incidents from your incident tracking system, if applicable, that identify the updates to the database.

5. Select the Update IDs tab.
6. Enter the primary incident tracking ID associated with the update you want to implement in the **Update ID** field.

This field is numeric. The system considers the first value in the list to be the primary ID for the project. When entering your own incidents:

- a. Enter the names of the fixes or the update IDs fixed in this project. The system logs them to the manifest and includes them when Change Packager copies the project.
- b. Click **Add** to add it to the list.

### Note

In order for Change Packager to create the change package successfully, you must enter a value in the **Update ID** field.

7. Select the Pre-Requisites tab.

List any prerequisites that this project might have. Change Assistant checks those incidents that you enter here against those listed in the target environment's change log to verify whether the fix has been applied.

## Defining the File Type Code

Each file reference definition that you create for the project must be associated with a file type code. The file type code stores generic information that is applicable to a group of files within the same target directory.

Access the file type code definition from **Tools**, and then **Miscellaneous Definitions**, and then **File Type Codes**.

To define the file type code for the file reference definition:

1. Click **New** to access the New File Type Code dialog box.
2. Enter a file type code and click **OK**.

The file type code can be up to 30 characters in length. This action opens the File Type Code dialog box.

3. Enter the **Path**.

This notifies Change Assistant where the file belonging to this type code should be deployed. The only supported environment variable for use is `%ps_home%`.

4. Enter a description for the file type code.

This field is required in order to save the definition.

## Creating a File Reference Definition

If you have individual files that need to be packaged with the project, you can create file reference definitions to identify them. Create one file reference definition for each file. You create a file reference definition in the same manner as all other PeopleTools definitions in Application Designer, by selecting **File**, and then **New** from the menu.

| Field or Control                      | Description                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>File Name and Path</b>             | Enter the path and file name for the file you want to reference. Use the browse button to search the proper path. This is the source location and file from which Change Packager selects the definition for packaging. This field supports the use of environment variables.<br>If you want to create a file reference with a variable path, prepend <code>%FILEREFPATH%</code> to the filename. |
| <b>Change Assistant Template Text</b> | Enter the text you want to display in the Change Assistant template for this change package. This field has a 20 character limit.                                                                                                                                                                                                                                                                 |
| <b>Binary</b>                         | Check if the file is a binary file. This information is necessary to properly transfer the file to the target platform.                                                                                                                                                                                                                                                                           |
| <b>Database Platform</b>              | Select the database platform for the target database.                                                                                                                                                                                                                                                                                                                                             |
| <b>Operating System</b>               | Select the operating system for the target database.                                                                                                                                                                                                                                                                                                                                              |
| <b>PeopleSoft Server</b>              | Select the applicable server for your system.                                                                                                                                                                                                                                                                                                                                                     |
| <b>Unix Target Directory Security</b> | Specify the file permissions the file should have once it is copied if operating on a UNIX system.                                                                                                                                                                                                                                                                                                |

For each of the drop-down list boxes in this dialog box, you may select multiple entries by using the **Shift/Ctrl** keystroke combinations.

The file reference properties contain only the General tab where you can enter any comments about the file reference as well as select the **Owner ID**. This tab also tells you when the definition was last updated and by whom.

When you save the file reference definition, the definition name defaults to the file name you entered in the **File Name and Path** field. The Save As dialog box prompts you for the **File Type Code**, which is a requirement for every file reference definition.

### Variable File Reference Path

You can use a variable path as a file reference. To do this, in addition to the steps for creating an absolute path:

- In the File Name and Path edit box, enter the name of the file and prepend the filename with %FILEREFPATH%.  
For example: %FILEREFPATH%\ExcelToCI.xls
- Add this file reference to a change project.

This example illustrates the fields and controls on the Example of Variable Path File Reference. You can find definitions for the fields and controls later on this page.

The screenshot shows a dialog box titled "EXCELTOCI\_XLS.EXCEL (File Reference)". It contains several fields and lists:

- File Name and Path:** A text box containing "%FILEREFPATH%\ExcelToCI.xls" with a browse button (three dots) to its right.
- Binary:** A checked checkbox.
- Database Platform:** A list box with "All" selected. Other options include DB2 OS390, DB2 UDB (Unix/NT), Informix, Microsoft SQL Server, and Oracle.
- PeopleSoft Server:** A list box with "File Server" selected. Other options include All, App Server, Batch Server, and Web Server.
- Operating System:** A list box with "All" selected. Other options include AIX, HP-IA64, HP-PARISC, Linux, and OS/390.
- Unix Target Directory Security:** A list box with "GROUP EXECUTE", "GROUP READ", "GROUP WRITE", "OTHER EXECUTE", "OTHER READ", and "OTHER WRITE" selected.

Using variables in the file reference definition eases the repackaging of a change package. When you create a change package with a variable file reference, the File Reference Path edit box in Create Change Package dialog expands the %FILEREFPATH% variable in the file reference definition. However, the file reference definition itself is not updated in the process.

This enables you to repackage change packages without having to modify the file reference definitions. The value in the File Reference Path field is stored in the registry and displays the last value.

When the change package is recreated, the update ID automatically expands the file reference paths according to the following construct:

*file reference path + upd + update ID + \ + upd + update ID + \_batch\filereferences\ + file type code + filename*

For example:

c:\temp\upd999999\ upd999999\_batch\filereferences\XLS\ExcelToCI.xls

c:\temp\upd999999\ upd999999\_batch\filereferences\SQR\xrfwin.sqr

If the file does not exist in the directory, the system searches for the file reference path. If the file isn't found in this directory, then an error will be displayed and the Change Packager fails to create a change package.

See [Creating a Change Package](#).

## Modifying the Upgrade Definition Type

After creating the file reference definitions and inserting them into the change project, the next step is to modify the upgrade definition type to instruct whether Change Assistant should deploy or execute the file reference. Deploying the file copies it to the location specified in the File Type Code defined in the target environment. Executing the referenced file means it will be run on the Change Assistant machine.

### Note

File references and application engine programs are the only definition types that can be executed.

To modify the upgrade definition type:

1. Open the change project.
2. Select the Upgrade tab in the project workspace.
3. Double-click the **File References** folder.

This action opens the upgrade definition type listing all file reference definitions for that project.

4. Choose the appropriate upgrade attributes for each of the file references listed.

Refer to this table to ensure the desired results:

| Desired Result     | Execute Check Box | Upgrade Check Box | Action Option |
|--------------------|-------------------|-------------------|---------------|
| Deploy and Execute | Selected          | Selected          | Copy          |
| Deploy only        | Cleared           | Selected          | Copy          |
| Execute only       | Selected          | Cleared           | Copy          |
| No Step*           | Cleared           | Cleared           | Copy          |
| No Action**        | Either            | Either            | Delete        |

\* No step indicates that the generated Change Assistant template will not have a step corresponding to that file reference definition.

\*\* No action means that the file is neither deployed or executed in the target machine.

The default settings for the upgrade definition type are set for deploy only.

5. Save the project.

## Creating Change Packages

This section discusses how to:

- Create a change package.

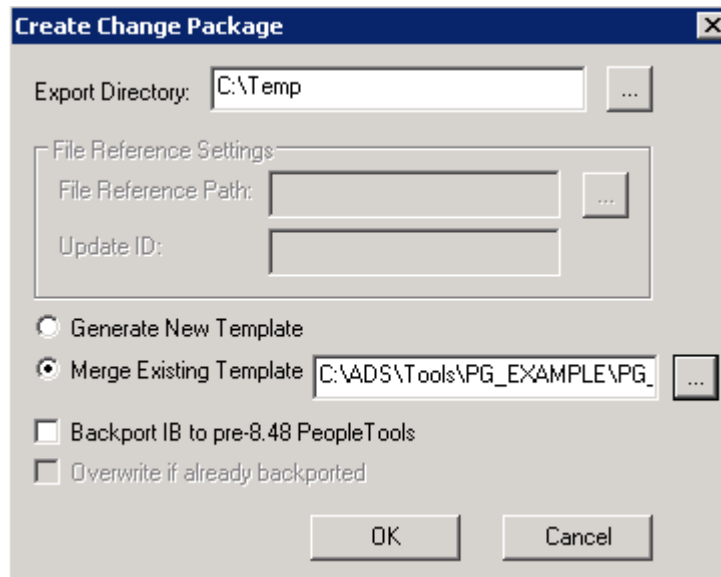
- Modify the Change Assistant template.
- Finalize the change package.

## Creating a Change Package

Once you have created your change project you can build the change package using the Change Packager feature in Application Designer.

To create a change package, select Tools, Create Change Package, which invokes the Create Change Package dialog box.

This example illustrates the fields and controls on the Create Change Package dialog box. You can find definitions for the fields and controls later on this page.



| Field or Control               | Description                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Export Directory</b>        | The Change Packager feature copies the project into the directory you identify. Use the browse button to search for the desired directory. If you already created a change package for this project in the same directory, the system prompts you to delete the existing file.                                                                               |
| <b>File Reference Settings</b> | These settings apply only if your change package contains file references, otherwise these settings are disabled. <ul style="list-style-type: none"><li>• <b>File Reference Path:</b> Enter the path for the file reference.</li><li>• <b>Update ID:</b> Enter the associated update ID. See <a href="#">Creating a File Reference Definition</a>.</li></ul> |
| <b>Generate New Template</b>   | Select this option if you intend to generate a new Change Assistant template with your change package that <i>does not</i> incorporate any manual changes made to an existing template.                                                                                                                                                                      |

| Field or Control                           | Description                                                                                                                                                                                                                                                       |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Merge Existing Template</b>             | Select this option if you intend to incorporate any manual changes you have made to an existing Change Assistant template. Enter the file path or navigate to the location of the existing Change Assistant template you want to merge with the updated template. |
| <b>Backport IB to pre-8.48 PeopleTools</b> | Select if your changes affect Integration Broker (IB) definitions and need to be applied to versions of PeopleTools before PeopleTools 8.48. In PeopleTools 8.48, the metadata surrounding Integration Broker changed significantly.                              |
| <b>Overwrite if already backported</b>     | Only appears if <b>Backport IB to pre-8.48 PeopleTools</b> is selected. Select this option to overwrite any Integration Broker changes that have already been backported.                                                                                         |

The progress dialog boxes indicate the definitions that the system is copying into the change package. The system then confirms that the change package was created successfully. The Results tab of the output window displays a list of the definitions in the project by definition type, as well as any errors encountered.

Open the staging directory to confirm the change package was created successfully. The destination directory now includes a new folder named after the project and appended with the word *Package*.

### Change Packager Output

The Change Packager feature generates several folders and a manifest, placing them in the output directory you specified previously. The manifest from the change package is an XML document containing data that may need to be accessed quickly by Change Assistant. This manifest information includes:

- Update ID(s) from the project properties.
- Prerequisite ID(s) from the project properties.
- Update summary text from the project properties.
- The user who created the update.

This is the user ID for the individual that last updated the project based on the *By User* field in the Project Properties dialog box.

- Post date.

This date is generated from last updated *Date/Time* field from the Project Properties dialog box. Change Assistant uses this date to determine the order in which to apply a selection of change packages.

- The number of manual steps included in the Change Assistant template.
- A count of the definition types included in the project.

In addition to the manifest are six folders that include:

- The Change Assistant template

The template contents for the update are tailored to the specific contents of the change project, including all relevant file deployment steps for each file reference definition given the file type code and the file reference attributes.

- Documentation

The change package documentation is an HTML file. This document contains general information on the installation as well as instructions that are customized to your specific customizations. When you open the change package in Change Assistant, it displays the proper documentation for the current step in which you are currently working.

- File references

The File References folder contains folders for each file type code associated with each file reference definition in the project. Each file type code folder contains a copy of the actual file referenced by the project's file reference definitions associated with this file type code.

- Project folder

This folder contains an XML file of all project information.

- Pre 8.44 project folder

This folder is applicable only to customers operating on a pre-8.44 PeopleTools release and are therefore not using Change Assistant to deploy change packages.

## Modifying the Change Assistant Template

In most cases, the Change Assistant template generated by the Change Packager is exactly what you need to begin working with Change Assistant. However, in rare instances it may be necessary to manually add or update the steps in the Change Assistant template. The template is located in the Change Assistant package directory as an XML file.

## Finalizing a Change Package

Once you create the change package and are satisfied with the Change Assistant template, finalize the change package. The finalization process validates the files to confirm that all of the necessary pieces to produce the change package are present and generates a zip file for the entire change package. The zip file enables you to easily migrate your change sets to multiple environments.

To finalize a change project:

1. Open the change project to finalize.
2. Select **Tools**, and then **Finalize Change Package** from the menu.
3. Enter the location of the staging directory that you would like zipped up for the change package and click **OK**.

Use the browse button to search for the proper directory.

Change Packager places the zip file in the "<project name>Package" file, using the project name for the file name.

## Working With Change Package Automation

This section provides an overview, and discusses:

- Working with ReleaseAdaptor.
- Working with ProjectFilter.

- Working with ProjectInspector.

## Understanding Change Package Automation

PeopleTools provides a set of standalone utilities that automate the manipulation of change packages, ensuring that only the appropriate changes get included in change packages and applied to your system. For the most part, these utilities improve the process of creating change packages within Oracle for distribution to customer sites. However, they can also be useful at customer sites, where development teams create custom change packages to apply to their implementations.

These utilities address situations in previous releases, where during upgrades, manual steps were required and multiple change packages need to be applied, such as in the cases where Integration Broker metadata needed to be applied to pre-PeopleTools 8.48 releases. In most cases, these utilities run in the background when you create change packages or perform an upgrade while using Change Assistant. To run these utilities manually, they can be invoked from the command line, or added to automation shell scripts, for example.

When these utilities are used within an upgrade process, the documentation in your Change Assistant job and your upgrade documentation will provide the necessary details.

See Your PeopleSoft application upgrade documentation

## Working with ReleaseAdaptor

ReleaseAdaptor is invoked by Change Assistant to remove:

- contents from the project that are not consumable by the target PeopleTools release.
- unneeded steps from the change package template.

ReleaseAdaptor appears as a Change Packager step, and automatically examines the project to determine if it is applicable to the current PeopleTools release. For example, it determines whether a project contains Integration Broker content, and, if the PeopleSoft application release is pre-PeopleSoft 9.0. If the project meets these criteria it generates and includes the additional pre-PeopleTools 8.48 Integration Broker elements without any manual intervention. The resulting change package will contain all elements required for consumption by all applicable releases of PeopleTools.

A set of command-line transformation programs enables this processing. Which programs need to be run for a specific release is determined by the TRANSFORM\_PROGRAMS.XML file. TRANSFORM\_PROGRAMS.XML has two sections:

- a list of <release> tags that map various pillar and release identifiers into <InitialToolsRelease> elements
- and a list of <transform> tags that specify which transforms to apply for each <InitialToolsRelease> element

The TRANSFORM\_PROGRAMS.XML file is located in *PS\_HOME\BIN\CLIENT\WINX86*.

The final, consolidated project will contain all required elements for all release targets.

## Working With ProjectFilter

ProjectFilter enables you to remove the specified project contents from the specified project.

Use the following syntax:

```
ProjectFilter >]
[-N <instance name[;instance name*]>]] | [-TL]] [-LOG <log filepath>] [-?]
```

| Parameter | Description                                                                                                                                                                                                                                                                                          |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -PRJ      | Specify the project file to be scanned. No default value assumed.                                                                                                                                                                                                                                    |
| -TY   -TX | -TY specifies one or more object type names to be removed, delimited by a semicolon character (;).<br>-TX specifies one or more type names to be retained, delimited by a semicolon character (;).<br>-TY and -TX are mutually exclusive. If neither TY nor TX are specified, all types are removed. |
| -N        | A list of names of instances to be removed or retained in the form type:name0.name1.name2.name3 where each name is delimited by a semicolon (;) character. If not specified, all instances are removed or retained consistent with any -TY or -TX specification.                                     |
| -TL       | Lists the valid type identifiers, names, and descriptions.                                                                                                                                                                                                                                           |
| -LOG      | Absolute path to log file.                                                                                                                                                                                                                                                                           |
| -?        | Shows usage details.                                                                                                                                                                                                                                                                                 |

#### Example: ProjectFilter

Entering the following removes record and field type objects from the project C:\PRJ151141.xml, and writes a log file to C:\ProjectFilter151141.log.

```
ProjectFilter -PRJ C:\PRJ151141.xml -TY Record;Field
-LOG C:\ProjectFilter151141.log
```

Entering the following lists valid object types, and writes a log file to C:\ProjectFilterObjTypes.log

```
ProjectFilter -TL -LOG C:\ProjectFilterObjTypes.log
```

## Working With ProjectInspector

ProjectInspector enables you to query the contents of projects. It does not require signon and it does not make a database connection. ProjectInspector is designed to be incorporated in automation shell scripts and for ad hoc queries. It can be run against projects created using previous releases of PeopleTools.

Use the following syntax: This has the command line:

```
ProjectInspector -PRJ <project file> [-TY <type name [';' type name]* >]
[-N <instance name [';' instance name]* >][-L N | C | T][-TL] [-?]
```

| Parameter | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -PRJ      | Path name of the project file to be scanned. There is no default. If just a name is specified, the program checks in the current directory.                                                                                                                                                                                                                                                                                                                                                                                                    |
| -TY       | One or more object type names to be listed, delimited by a semicolon character (;).<br>If not specified, all types are removed.                                                                                                                                                                                                                                                                                                                                                                                                                |
| -N        | A list of names of instances to be removed or retained in the form<br>type:name0.name1.name2.name3 where each name is delimited by a semicolon (;) character. If not specified, all instances are removed or retained consistent with any -TY value.                                                                                                                                                                                                                                                                                           |
| -L        | Specifies the listing format and can be either N, T or C. <ul style="list-style-type: none"> <li>• N means list the types and names of all objects with one object per line.</li> <li>• T means list the types and counts of all objects with one type per line.</li> <li>• (Default) C means list just the number of objects as a single integer.</li> </ul> The -N and -T arguments can be used in the same command provided the types do not overlap. Specifying the same types in an -N name argument as in a -T argument causes an error. |
| -TL       | Lists the valid type names, numeric identifiers, and descriptions.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| -?        | Shows usage details.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

### Example: ProjectInspector

Entering the following lists the number of subscription PeopleCode and message channel definitions in the project, or a null string if there were none.

```
ProjectInspector -PRG PRJ8979874.XML -TY SubscriptionPPC ; MessageChannel -T T
```

# Getting Started with Software Upgrades

## Understanding Change Assistant For Upgrades

Application upgrade only applies to upgrading an older application release to application release 9.2. Once your application is on 9.2, PUM is used to apply maintenance and new features. You use Change Assistant to help automate and customize the PeopleSoft upgrade process. A PeopleSoft upgrade typically includes a PeopleTools and a PeopleSoft application upgrade.

Depending on your upgrade path, the application upgrade may be combined with the tools upgrade. If they are not combined, you will need to perform the tools upgrade before the application upgrade.

The following list describes the major steps within an upgrade when using Change Assistant.

- Deploy the Certified Upgrade Source Image as your New Release Demo database. The Upgrade Source Image is available for download from My Oracle Support. Starting with the release of PeopleSoft PeopleTools 8.56, deployment packages (DPKs) are being used for the Upgrade Source Images. Each PeopleSoft application upgrade home page in My Oracle Support includes a tab for the Upgrade Source Images for that application.  
See [PeopleSoft Upgrade Source Image Home Page \(ID: 1552580.1\)](#), and [Upgrading PeopleSoft? Start Here. \[ID 1587686.2\]](#)
- Deploy the PeopleSoft Update Image.  
See [Installing PeopleSoft Update Image](#)
- Configure Change Assistant for Upgrade.  
See [Configuring Change Assistant for Upgrade Application](#)
- Define Upgrade Package.  
See [Defining an Upgrade Package](#)
- Use the Upgrade Application action to create an upgrade job tailored to your specific environment, defining all the steps required to perform the upgrade.  
See [Upgrading Application](#)
- Use Change Assistant to guide you step-by-step through the upgrade processes. Change Assistant shows you documentation for each step, automates many of the steps, and keeps track of the upgrade progress.

## Databases Used for Application Upgrade

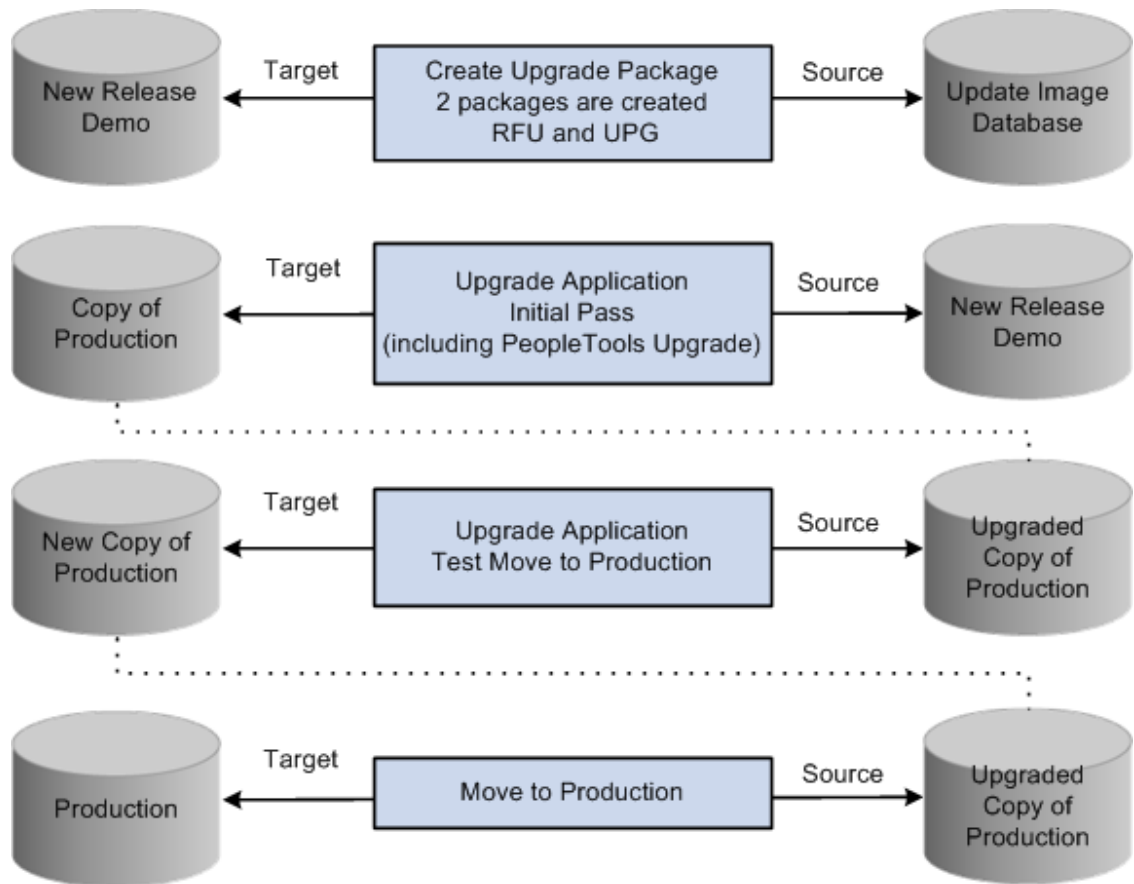
The following Databases are used in an Application Upgrade:

- Production
- Copy of Production
- New Release Demo (certified Upgrade Source database)

- Update Image

As you progress through the application upgrade process, the source and target databases

This diagram illustrates the source and target databases used during the upgrade process.



## Getting Started

Download documentation for the specific upgrade process that you will be performing from the Upgrade home page in My Oracle Support. 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.

Before continuing with the upgrade, you must complete all of the tasks in Getting Started on Your PeopleSoft Upgrade, "Starting Your Upgrade."

# Configuring Change Assistant for Upgrades

## Defining an Upgrade Package

The Define Upgrade Package component in the PUM PIA application will create 2 change package definitions:

- Upgrade package (UPG)  
This package contains the Application Upgrade template from your current release to 9.2.
- Required for Upgrade package (RFU)  
This package contains all of the bugs required for upgrade.

To define an Upgrade Package:

1. In Change Assistant configure the General Options and PUM Source.  
See [Configuring Change Assistant for Upgrade Application](#)
2. Upload the Upgrade Source Database to the PUM Source database.  
See [Uploading Target Database Information](#)
3. Select Tools, Define Change Package.
4. Click the Click Here to Open Browser and Connect to the PUM Source Database.
5. Sign on to the PUM Source Database.
6. Select PeopleTools, Lifecycle Tools, Update Manager, Update Manager Dashboard.
7. Expand the folder Select Target Database.
8. Click on the Upgrade Source database name.
9. Expand the Define Change Package folder and select Define Upgrade Package.
10. The Define Upgrade Package wizard will guide you through the steps to create a change package definition.
  - Step 2 of 6 - Enter Change Package Name  
See [Define Upgrade Package Step 2 of 6](#)
  - Step 3 of 6 – Select Scope
  - Step 4 of 6 – this step does not apply to upgrade packages and therefore is skipped.
  - Step 5 of 6 - Review Bugs
  - Step 6 of 6 - Done Identifying Bugs
11. Return to Change Assistant and create the Upgrade Change package.

## Selecting the Target Database

The target database for an Upgrade package is the Upgrade Source database (New Release Demo).

## Define Upgrade Package Step 2 of 6

Enter a name and description for the Upgrade Package.

This example illustrates the fields and controls on the Upgrade Package Step 2 of 6 page. You can find definitions for the fields and controls later on this page.

Upgrade Package

Step 2 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

123456

PreviousNext

Enter Change Package Name

The change package name must be unique for the user-selected target database.

Database

H92CD610

PeopleTools Release

8.57.07

Description

Package Name

HCM91TO92

Action

☒ Create☐ Edit

Package Name

HCM91TO92

Package Description

HCM app upgrade from 9.1 to 9.2

| Field or Control    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Package Name        | <p>Enter a name for your upgrade package. To edit an existing change package, select the Lookup button. The list of change packages that can be edited is restricted as follows:</p> <ul style="list-style-type: none"><li>• Packages created by the current user.</li><li>• Packages created for the currently selected target database.</li><li>• Packages which have been defined but have not been created.</li></ul> <p>If the package name already exists, the Change Package Options page will be displayed. See <a href="#">Define Update Package Wizard Step 2 of 6</a></p> |
| Package Description | <p>Enter a description for the upgrade package.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## Define Upgrade Package Step 3 of 6

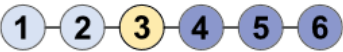
Select which App Upgrade Option to use. By default Application Upgrades to 9.2 is selected.

This example illustrates the fields and controls on the Upgrade Package Step 3 of 6 page. You can find definitions for the fields and controls later on this page.

Upgrade Package

Step 3 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.



Select Search Method

Database

H92CD610

PeopleTools Release

8.57.07

Description

Package Name

HCM91TO92

App Upgrade Options

☒ Application Upgrades to 9.2

From

9.10

To

9.20 Image 24 PT857

☒ Include Required For Upgrade Fixes in Package

☐ Required For Upgrade Fixes

App Upgrade Options

| Field or Control            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Application Upgrades to 9.2 | Select this radio button to create an application upgrade package (UPG).<br>Select the From release from the drop down list.<br>Select the Select the To path which will align with the Upgrade Certified Image, for example 9.2 Image 10 from the drop down list.<br>By default Required for Upgrade Fixes will be included in the package.<br><b>Note:</b> When you select this option 2 change package definitions are created UPG and RFU. |
| Required for Upgrade Fixes  | Select this radio button to create a Required for Upgrade (RFU) package.<br><b>Note:</b> When you select this option only 1 change package is created RFU.                                                                                                                                                                                                                                                                                     |

Define Upgrade Package Step 5 of 6

When you transition to step 5, the upgrade path is displayed.

This example illustrates the fields and controls on the Upgrade Package Step 5 of 6 page. You can find definitions for the fields and controls later on this page.

## Upgrade Package

Step 5 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1 2 3 4 5 6

Previous

Next

## Review Bugs

Review bugs to be included in the package. Click on Next to create Change Package.

|              |           |                     |         |
|--------------|-----------|---------------------|---------|
| Database     | H92CD610  | PeopleTools Release | 8.57.07 |
| Description  |           |                     |         |
| Package Name | HCM91TO82 |                     |         |

## Upgrade Path

| From | To                  |
|------|---------------------|
| 9.10 | 9.20 Image 24 PT857 |

## Required Upgrade Package Contents

| BUG Number | Product | Subject                                                                          | User Selected | True Post Req | Custom Impact | Test Exists | Image Number | Details |
|------------|---------|----------------------------------------------------------------------------------|---------------|---------------|---------------|-------------|--------------|---------|
| 30192588   | SC      | INCLUDE PRIORITY FIELD IN UPG_SC91 AE PROGRAM FOR TBE PUSH NOTIFICATION CONFIGUR |               |               |               |             | 32           |         |

## Define Upgrade Package Step 6 of 6

When you transition to Step 6 the project definitions for the upgrade (UPG) and the required for upgrade (RFU) are created, as well as the Change Assistant template.

You will return to Change Assistant to create the Change Packages.

This example illustrates the fields and controls on the Upgrade Package Step 6 of 6 page. You can find definitions for the fields and controls later on this page.

## Upgrade Package

Step 6 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1 2 3 4 5 6

Previous

Next

## Done Identifying Bugs

|              |           |                     |         |
|--------------|-----------|---------------------|---------|
| Database     | H92CD610  | PeopleTools Release | 8.57.07 |
| Description  |           |                     |         |
| Package Name | HCM91TO92 |                     |         |

## Summary

Processing Completed Successfully

- > Project Definition HCM91TO92UPG Created
- Project Definition HCM91TO92RFU Created
- > Change Assistant Template Definition Created
- > [Review Package Definition](#)

**Return to Change Assistant to begin packaging.**

## Creating Upgrade Package

To create the upgrade package in Change Assistant:

1. Navigate to the Create Change Package if you are not already on that page.  
Select Tools, Create Change Package
2. Select the upgrade change package for the drop down. There will be 2 packages for upgrade (UPG and RFU). Select one of these.

This example illustrates the fields and controls on the Create a New Change Package. You can find definitions for the fields and controls later on this page.

**Change Package Wizard**

**Create a New Change Package**

[Create CP](#)  
☒ Search

PUM Source Database  
H92PUMCD

Create a New Change Package  
 Change Packages are Created using Definitions in the PUM Source

Download Directory: C:\PUM\Downloads\

Change Package: HCM91TO92RFU

☒ Create Selected Change Package Definition  
☐ Proceed to Apply Change Package Wizard after Package Creation

3. Click Next. You will receive a message *Do you need to create the corresponding UPG CP?* or  
*Do you need to create the corresponding RFU CP?*, depending on your selection. Click OK.
4. The change packages will be created.

## Configuring Change Assistant for Upgrade Application

Before you begin performing an application upgrade using Change Assistant, you configure Change Assistant settings.

- General Options
- PUM Source is not used with Upgrade Application
- EM Hub is not used with Upgrade Application
- Additional Options is optional.

Depending on the upgrade pass, the source and target databases will change.

| Pass    | Source                                                                                                                                                                                  | Target             |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Initial | New Release Demo database<br><b>Note:</b> This is either the certified Upgrade Source Image or Demo database for the Upgrade Certified new release installed from the media pack or CD. | Copy of Production |

| Pass                    | Source                      | Target                 |
|-------------------------|-----------------------------|------------------------|
| Test Move to Production | Upgraded Copy of Production | New Copy of Production |
| Move to Production      | Upgraded Copy of Production | Production             |

## Setting Change Assistant Options

To set Change Assistant Options:

1. In Change Assistant, select Tools, Options.
2. Select Application Upgrade and click Next.
3. On the **General Options** page, specify the high-level settings for your current environment and click Next.
4. On the **Additional Options** page, enter your optional email notifications settings.
5. Click Finish.

### General Options

The values entered on the General Options page are used as the default values for all of the various databases in the upgrade process.

This example illustrates the fields and controls on the General Options page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Update Manager Options' dialog box with the 'General' tab selected. The dialog has four tabs: 'General', 'PUM Source', 'EM Hub', and 'Additional'. The 'Settings' section includes a checked 'Show Welcome Page' checkbox, a 'Maximum Concurrent Processes' spinner set to 1, a 'PS Home Server Starting Port' text box with 6151, and a 'PS Home Server Maximum Instances' text box with 5. The 'Directories' section lists five fields with browse buttons: '\*PS Home:' (C:\PT8.55\), '\*Staging Directory:' (C:\PUM\Staging\), '\*Output Directory:' (C:\PUM\Output\), '\*Download Directory:' (C:\PUM\Download\), and '\*SQL Query Tool:' (C:\Oracle\product\12.1.0\dbhome\_1\BIN\sqlplus.exe).

| Field or Control                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum Concurrent Processes</b>     | Specifies the maximum number of processes that can be executed concurrently on the local machine. The default is 1.                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>PS Home Starting Port</b>            | Specify the port number for the first PS Home server.<br><br>Change Assistant uses this port number to communicate with Change Assistant PS Home servers. The default starting port number is 6151. If you enter a port number that is already in use, you see an error message. You must change to a port number that is not in use, and then restart Change Assistant for the change to take effect.                                                                                                                                                                                       |
| <b>PS Home Server Maximum Instances</b> | Enter a number between 1 and 10 for the maximum number of PS Home servers.<br><br>Use this value for environments with more than one PS_HOME. For each server instance, Change Assistant increments the PS Home Server Starting Port number by 1 up to the maximum number of instances. For example, with a PS Home Server Starting Port value of 6151 and a PS Home Server Maximum Instances value of five, the port numbers would be 6151, 6152, 6153, 6154, and 6155. The default is 5.<br><br>If you change this value, you must restart Change Assistant for the change to take effect. |
| <b>PS Home</b>                          | Enter the full path in which you installed PeopleTools client on the Windows Client machine.<br><br><b>Note:</b> Specify the PS_HOME location you used to install Change Assistant.                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Staging Directory</b>                | Enter the directory in which you would like to stage all the Change Assistant upgrade files. This is the location that Change Assistant will store files to be used during the upgrade job.                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Output Directory</b>                 | Enter the directory in which you want the log files generated by the upgrade job.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Download Directory</b>               | Enter the download directory where you created the Upgrade Change Package.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

### Additional Options

This example illustrates the fields and controls on the Additional Options page. You can find definitions for the fields and controls later on this page.

**Change Assistant Wizard**

**Additional Options**

☐ Select Action  
**Options**  
☐ General  
☒ **Additional**

**Notification Settings**

☐ Send Email Notifications  
 SMTP Server:   
 Port:   
 Send To:   
 Return Address:

| Field or Control                | Description                                                                                                                                                                                           |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Send Email Notifications</b> | Select this check box to receive email notifications if there are errors in the update process. Change Assistant also sends you a completion message when it encounters a Stop in the update process. |
| <b>SMTP Server</b>              | Enter the SMTP mail server from which you receive the error or completion messages.                                                                                                                   |
| <b>Port</b>                     | Enter the port from which you want to access the email.                                                                                                                                               |
| <b>Send To</b>                  | Enter the address to which you want the email sent.                                                                                                                                                   |
| <b>Return Address</b>           | Enter the email address of the sender. Use this to identify who sent the notification.                                                                                                                |
| <b>Test</b>                     | Validates that email is sent to the designated recipients and is working correctly.<br><b>Note:</b> Ensure that your SMTP server is installed and configured correctly.                               |

## Upgrading Application

Before using the Upgrade Application task, the following must have been completed:

- Define Upgrade Package
- Configure Change Assistant Settings.

To use the Upgrade Application

1. In Change Assistant, select Tools, Upgrade Application.

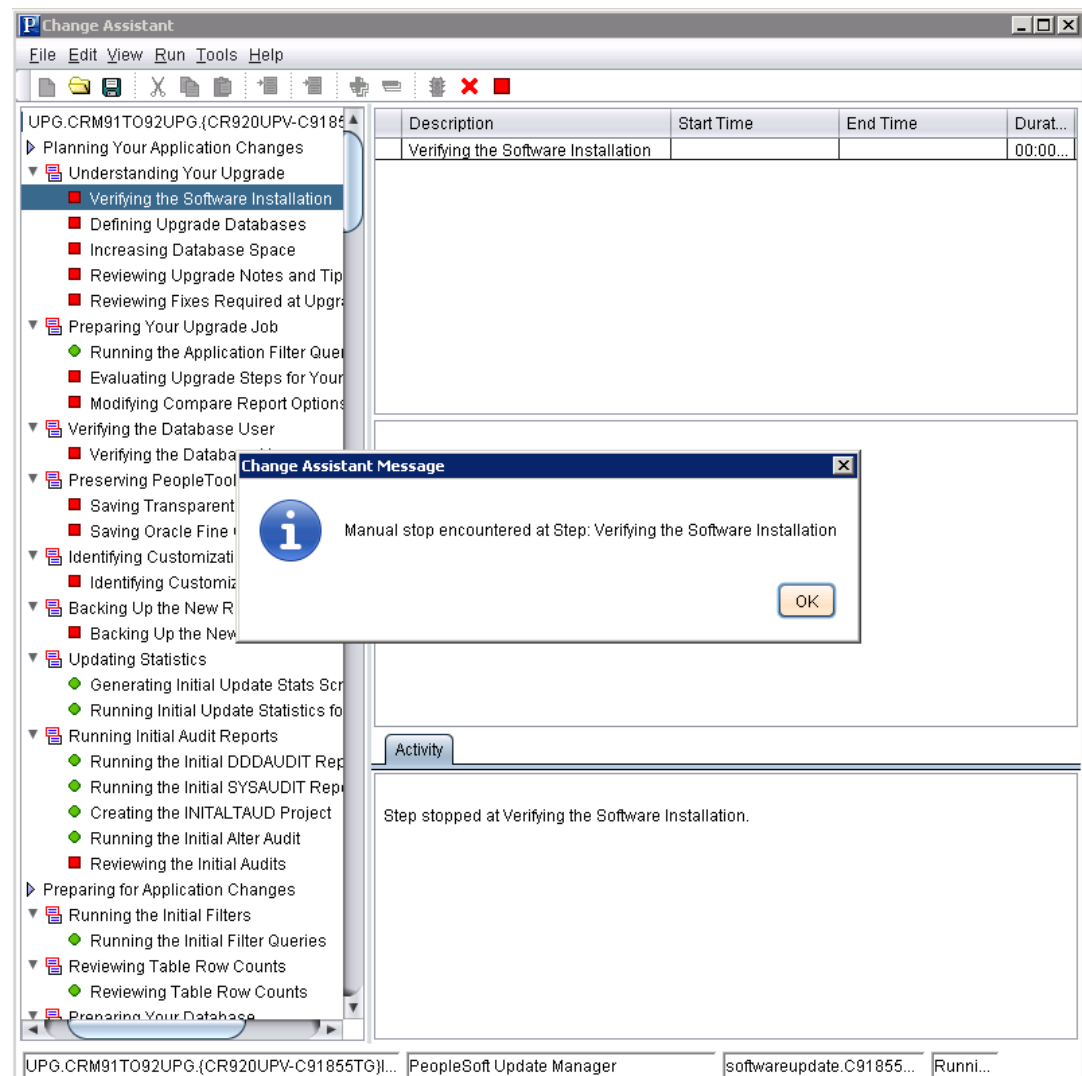
### **Note**

You must be in the Update Manager action.

2. The Change Package Wizard will guide you through the creating the upgrade job.

3. On the Change Package Settings page, select the download directory and apply type and click Next.
4. On the Select Upgrade Target Database page, select the target database and click Next.
5. On the Select Upgrade Source Database page, select the source database and click Next.
6. On the Application Upgrade page, select the packages to apply and click Next.
7. Change Assistant will check the compatibility and display the status. Review the checks and click Next.
8. The Apply Summary page is displayed. Click Finish.
9. Change Assistant will create the Application Upgrade job and open it.

This example illustrates the fields and controls on the Application Upgrade Job.



## Change Package Settings

On the Change Package setting page, you will select the download directory and apply type.

This example illustrates the fields and controls on the Upgrade Application - Change Package Settings. You can find definitions for the fields and controls later on this page.

Change Package Wizard

Change Package Settings

Task Steps

Settings

PUM Source Database

Not Set

Download Directory:

C:\PUM\Download\

...

Apply Type

Initial Pass

All Steps

Source Steps Only

Target Steps Only

Subsequent Pass

Move To Production

Synchronize Target Metadata(Requires Source)

Yes

No

| Field or Control   | Description                                                                                                                                                                                                                                                                                                          |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Download Directory | Select the directory where you created the Upgrade Package.<br>See <a href="#">Creating Upgrade Package</a>                                                                                                                                                                                                          |
| Apply Type         | Select the Apply Type. By default Initial Pass is selected. <ul style="list-style-type: none"><li>Initial Pass (default)<br/>Initial upgrade pass on your Copy of Production database.</li><li>Move to Production<br/>Upgrade between your Copy of Production database and your test or production system.</li></ul> |

## Select Upgrade Target Database

On the Select Target Database page, select the target database to upgrade. If the target database does not exist, click the Create button to launch the Database Wizard. See [Defining Databases](#)

 **Note**

For upgrades, you need to set the new home information on bottom of the Select Upgrade Target Database page. To set the new homes see [Configuring New Homes for Upgrade](#).

This example illustrates the fields and controls on the Select Upgrade Target Database page.

The screenshot shows the 'Change Package Wizard' window with the title bar 'Change Package Wizard'. The main title is 'Select Upgrade Target Database'. On the left, under 'Task Steps', there are two radio buttons: 'Settings' (unselected) and 'Select Upgrade Target' (selected). The main area contains the following fields and sections:

- Database:** A dropdown menu showing 'C91855TG' and a 'Create' button to its right.
- Login Information:** A section with four text boxes:
  - User ID: VP1
  - Access ID: emdbo
  - Connect ID: people
  - DBOwner ID: (empty)
- SQL Query Tool:** A text box containing 'C:\Oracle\product\12.1.0\dbhome\_1\BIN\sqlplus.exe'.
- Current Homes:** A section with three text boxes:
  - PS Home: C:\PT8.55-902-R1\
  - PS App Home: C:\PT8.55-902-R1\
  - PS Cust Home: C:\PT8.55-902-R1\
- SQR Settings:** A section with three text boxes:
  - SQR Executables (SQRBIN): <PS\_Home>\bin\sqr\<plat>\binw
  - SQR Flags (PSSQRFLAGS): -ZIFC:\PT8.55\SQR\PSSQR.INI
  - PSSQR Path: %me%\SQR;%App\_Home%\SQR;%PS\_Home%\SQR

At the bottom right, there are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

## Select Upgrade Source Database

For the initial pass, the upgrade source database is the Release 9.2 Demo database certified for this upgrade.

This example illustrates the fields and controls on the Select Upgrade Source Database.

**Change Package Wizard**

**Select Upgrade Source Database**

**Task Steps**

- Settings
- Select Upgrade Target
- Select Upgrade Source**

Database: CR920UPV Create

**Login Information**

User ID: VP1

Access ID: emdbo

Connect ID: people

DBOwner ID:

SQL Query Tool: C:\Oracle\product\12.1.0\dbhome\_1\BIN\sqlplus.exe

**Current Homes**

PS Home: C:\PT8.55-902-R1\

PS App Home: C:\PT8.55-902-R1\

PS Cust Home: C:\PT8.55-902-R1\

**SQR Settings**

SQR Executables (SQRBIN) <PS\_Home>\bin\sql<plat>\binw

SQR Flags (PSSQRFLAGS) -ZIFC:\PT8.55\SQL\PSSQR.INI

PSSQR Path me>\SQR;<App\_Home>\SQR;<PS\_Home>\SQR

Back Next Finish Cancel

## Select Application Upgrade

On the Select Application Upgrade Page, the Upgrade source and target are displayed with the PeopleTools release for the database, the current PS\_HOME and the new PS\_HOME.

This example illustrates the fields and controls on the Select Application Upgrade page. You can find definitions for the fields and controls later on this page.

**Change Package Wizard**

### Select Application Upgrade

**Task Steps**

- ☐ Settings
- ☐ Select Upgrade Target
- ☐ Select Upgrade Source
- ☒ **Select Upgrade**

|                | Name     | DB      | Current PS_HOME | New PS_HOME |
|----------------|----------|---------|-----------------|-------------|
| Upgrade Source | CR920UPV | 8.55.00 | 8.55-902-R1     | n/a         |
| Upgrade Target | C91855TG | 8.55.00 | 8.55-902-R1     | n/a         |

Packages to Apply

☒ Application Upgrade

**Select Package**

| Select                           | Package Name  | Description                 | Date             |
|----------------------------------|---------------|-----------------------------|------------------|
| <input checked="" type="radio"/> | CRM91T092U... | Selective Packaging Project | 2015-10-25-13... |

☐ Required for Upgrade Package

**Select Package**

| Select | Package Name | Description | Date |
|--------|--------------|-------------|------|
|--------|--------------|-------------|------|

☐ PeopleTools Upgrade

PeopleTools Upgrade Package Location: C:\PUM\Download\

**Select Package**

| Select | Package Name | Description | Date |
|--------|--------------|-------------|------|
|--------|--------------|-------------|------|

Back Next Finish Cancel

Select the Packages to Apply:

- Application Upgrade
- Required for Upgrade Package
- PeopleTools Upgrade
- PeopleTools Patch

## Validation Page

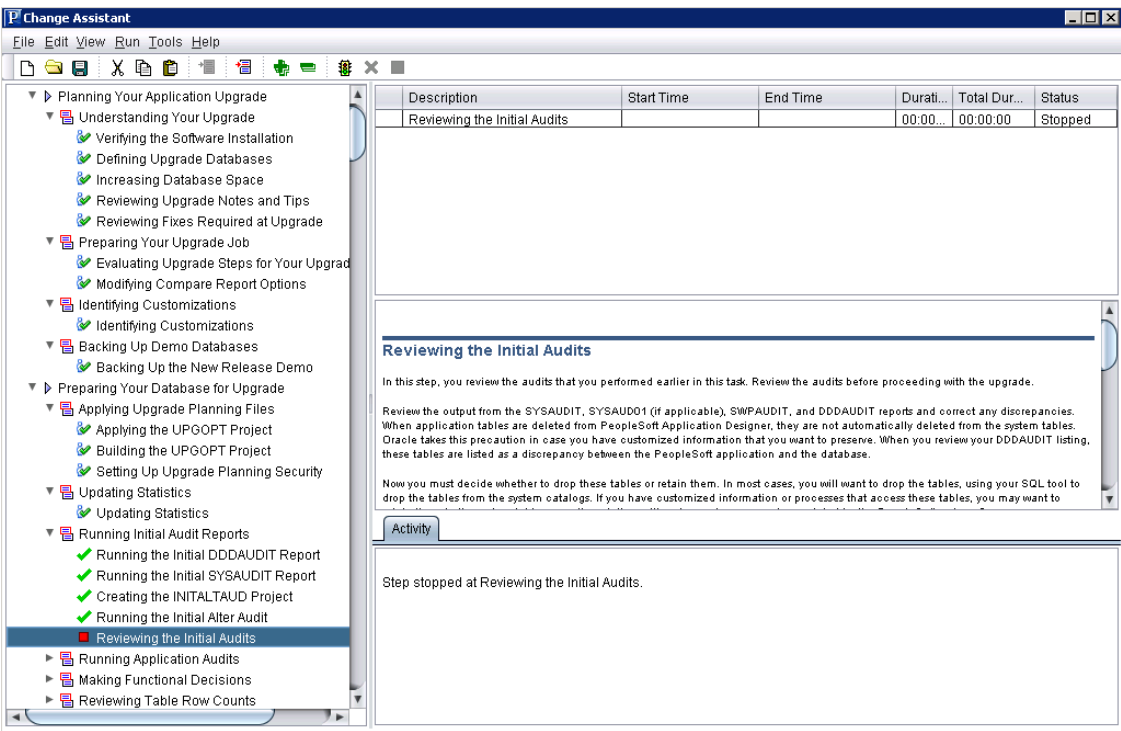
The Validation page will perform checks and validations on both the source and target environments.

# Running Upgrade Jobs with Change Assistant

## Running the Upgrade Job

When you create a new upgrade job, you will see a job view similar to the following example:

This example illustrates the fields and controls on the Upgrade Job. You can find definitions for the fields and controls later on this page.



In the job area on the left-hand side of the screen, you'll see one of the following icons next to the steps.

| Field or Control                                                                    | Description                                                                                                          |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
|  | Indicates each step that must be performed manually. The status of manual steps can be set only to Stop or Complete. |

| Field or Control                                                                    | Description                                                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Indicates that Change Assistant can automatically run this step. You can set the status to Stop, Run, Restart, or Complete. If you set the status to Stop, this indicates that you want to stop the upgrade job at that step or that a milestone has been reached. The status can be reset to Run when desired. |
|    | Indicates a restart process. If a step failed and you corrected the problem, you can set the step to restart from the point of failure.                                                                                                                                                                         |
|    | Indicates that the process is running.                                                                                                                                                                                                                                                                          |
|    | Indicates a failure has occurred that needs immediate attention. This appears if a Data Mover script, SQL script, or project copy step fails. Resolve the error before continuing with processing.                                                                                                              |
|    | Indicates a warning for this step which does not need immediate attention. The job continues processing with no adverse affects. After the job completes, review the steps in a warning state and evaluate for further action.                                                                                  |
|    | Indicates that the step was completed by the system.                                                                                                                                                                                                                                                            |
|  | Indicates this step was completed manually.                                                                                                                                                                                                                                                                     |
|  | Indicates this step is filtered at the job level. Steps filtered at the job level will not execute and are equivalent to Complete. To hide these steps, select View, and deselect Steps Filtered at the Job Level.                                                                                              |
|  | Indicates this step is filtered by a filter query. Steps filtered by filter query will not execute and are equivalent to Complete. To hide these steps, select View, and deselect Steps Filtered by Filter Query.                                                                                               |

When you are ready to run your upgrade job, select **Run** from the Change Assistant toolbar. Monitor the status of the automated upgrade steps in the Step Details box. After a automated step is completed running in Change Assistant, you can view logs, scripts and update job properties for individual steps.

#### Note

Change Assistant uses Application Designer and Data Mover in the background to perform many of the tasks. When using Change Assistant, make sure that any current Application Designer and Data Mover sessions running on the same workstation as Change Assistant are closed before running Change Assistant.

## Viewing Upgrade Logs

You can view all the logs generated by the automated processes. After the process runs, you can select a step to view.

To view a log:

1. Highlight or select the step.
2. Select **Edit**, and then **View Log**.
3. Click OK

### Note

If a step encounters an error, Change Assistant will automatically display the View Log.

### Note

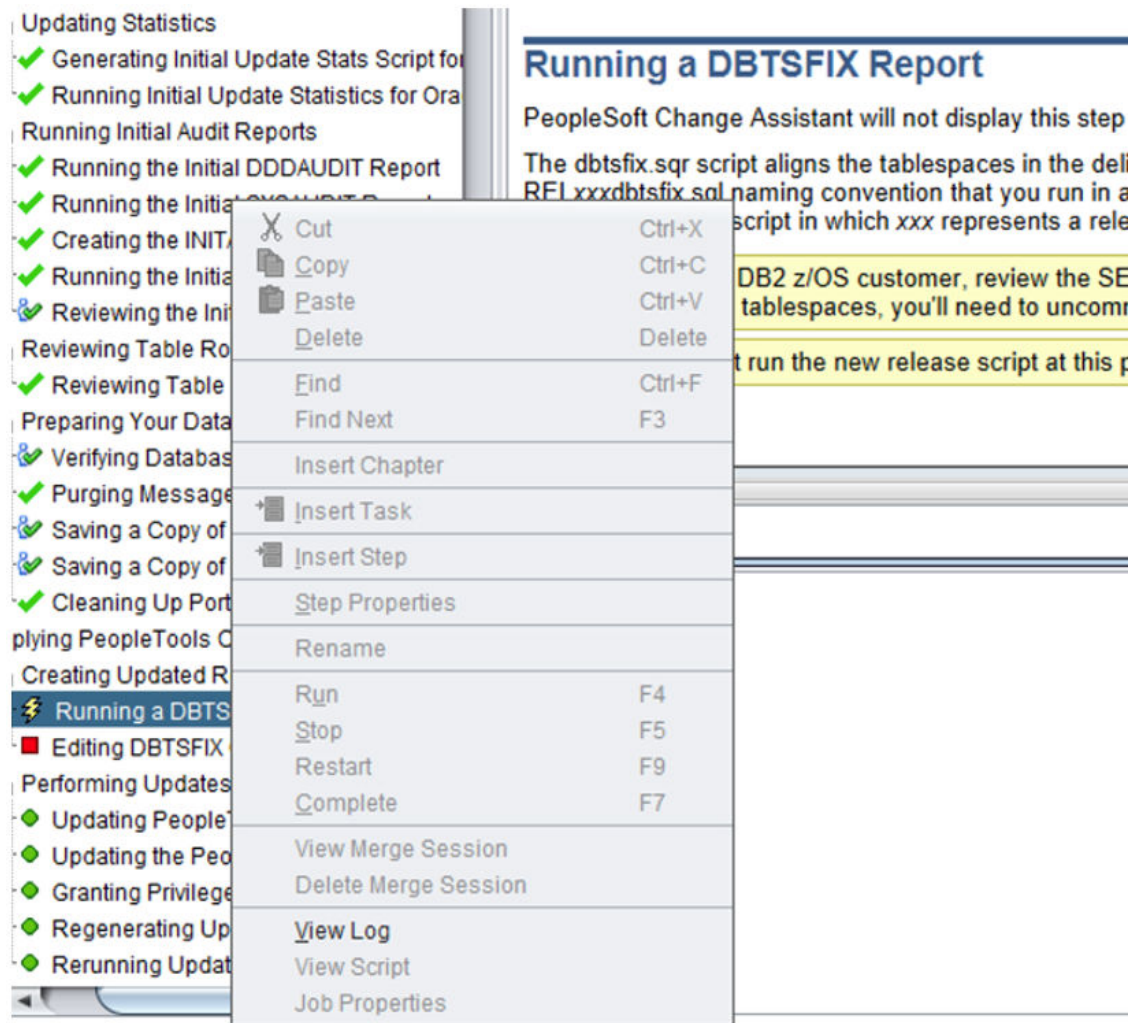
On the left side of the file list, Change Assistant displays both error and success symbols. These indicate which step logs contain errors to help you troubleshoot.

## Reviewing Sub-Steps

From PeopleTools 8.61, the View Log context menu is enabled while running the steps Running a DBTSFIX Report, Updating PeopleTools System Tables, and Loading Base Data.

Earlier, the View Log context menu used to be enabled for these steps only if the steps were Completed, Failed or in Warning status.

This example shows the View Log context menu enabled on the steps.



When these steps are run, a popup window with sub-steps is launched.

If you choose to close the sub-step popup window, it will not terminate the sub-step. You can re-open the sub-step popup window by selecting the View Log context menu.

If a sub-step is force stopped using the Force Stop (X) button, then the main step status is marked as Failed.

This information helps you restart the main step from the point of failure or run the step again.

## Viewing Scripts

You can view SQL and Data Mover scripts that are used to automate processes. Before the step that contains the script runs, you can view or modify the original script. After the process runs, you can view or modify the updated script and then restart the step.

To view a script:

1. Highlight or select the step.
2. Select Edit, View Script.
3. On the View Script dialog box, select the script you wish to view and click OK.

## Modifying Job Properties

You may want to maintain a record of how long your upgrade takes. In that case, you can view and change the dates and durations for steps in the View/Edit Job Properties dialog box.

Change Assistant allows you to set the status for these sub-steps: DBTSFIX, UpgradePeopleTools and LoadBaseData.

To modify job properties:

1. Highlight or select the step.
2. Select **Edit, Job Properties**.
3. Enter changes to a specific job property, or add comments, and click **OK**.

## Running Process Scheduler Steps

This section discusses how to:

- determine when to run Process Scheduler steps.
- prepare to run Process Scheduler steps.
- work with Process Scheduler steps.
- ensure Process Scheduler security authentication.

## Determining When to Run Process Scheduler Steps

Running the ProcessScheduler step type is designed to improve performance and quicken completion times of long-running, data-intensive steps, that can be run in parallel in an application upgrade. In most cases, the steps that would require Process Scheduler processing are delivered in your upgrade template configured to run on a Process Scheduler server. However, if you are creating a custom template, decide that improved performance can be gained by running a step through Process Scheduler, as opposed to running through a remote agent, you can configure a process to be run by a ProcessScheduler step.

Before setting up an upgrade process to be run through Process Scheduler:

- always consult your specific upgrade documentation for any recommendations, considerations, or restrictions.
- make sure Process Scheduler is configured and defined within your upgrade environment.

### Note

Refer to the PeopleSoft upgrade documentation for your upgrade path for additional information.

## Preparing to Run Process Scheduler Steps

Before running an upgrade process through Process Scheduler, the following items need to be addressed:

| Task                                                           | Documentation Reference                                              |
|----------------------------------------------------------------|----------------------------------------------------------------------|
| Set up Process Scheduler.                                      | See Process Scheduler                                                |
| Define Process Scheduler servers in your upgrade database.     | See <a href="#">Specifying Database Process Scheduler Settings</a> . |
| Include a ProcessScheduler step type in your upgrade template. | See <a href="#">Step Parameters</a> .                                |

## Working With Process Scheduler Steps

This section discusses how to:

- View Process Scheduler logs.
- Restart Process Scheduler steps.
- Cancel Process Scheduler steps.

### Viewing Process Scheduler Logs

If in your upgrade environment you have configured Change Assistant to be able to access Process Scheduler logging information, you can view the Process Scheduler processing information from within Change Assistant just as you would for any other step (click on the step and select Edit, View Log).

The status returned by Change Assistant for the step matches the status returned by Process Scheduler itself. The log files generated by Process Scheduler are not parsed for warnings or errors. Therefore, even though Change Assistant may show a status of Complete for a Process Scheduler step type, you should review the generated log files for more details.

### Restarting Process Scheduler Steps

If a Process Scheduler step has failed or has been stopped, you can restart the process by setting the step to Restart. This is most useful for restart-aware process definitions using Application Engine. When a step has been set to Restart, Change Assistant resubmits the process requests to Process Scheduler.

### Canceling Process Scheduler Steps

While Change Assistant is executing the ProcessScheduler step, you can force stop the step, by clicking on the step and selecting Run, Force Stop. This is equivalent to stopping or cancelling scheduled processes on the Process Scheduler. When you 'force stop' the step, Change Assistant connects to the Process Scheduler, which issues "cancel" commands to the appropriate processes.

## Ensuring Process Scheduler Security Authentication

PeopleSoft Change Assistant uses the PROCESSREQUEST component interface object to submit jobs to run on the PeopleSoft Process Scheduler server. You must ensure the user submitting the process has the appropriate authentication set for the PROCESSREQUEST object in the database the process runs against. You must edit security permissions to run the PROCESSREQUEST object.

To set up PROCESSREQUEST component interface security:

1. Log in to PeopleSoft through the browser.

2. Select PeopleTools, Security, Permissions and Roles, Permission Lists.
3. Select the permission list for which you want to set security. The Permission List component appears.
4. Access the component interfaces page and select the PROCESSREQUEST component interface.
5. Click Edit.  
The Component Interface Permissions page appears, showing all of the methods (both standard and user-defined) in the component interface and their method access.
6. Set the access permission for each method.  
Select Full Access or No Access. You must grant full access to at least one method to make the component interface available for testing and other online use.
7. Click OK, and then Save.

# Using Data Conversion Utilities

## 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 topic contains information regarding People Tools Impact Analysis (PTIA) and the PS\_PTIA\_DCAEPGMS table. The PTIA process consists of two Application Engine programs and is intended to optimize the data conversion process by analyzing Source and Target tables and state records 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.

## Using the PTIA Data Conversion Process

This section discusses:

- Understanding the PTIA Data Conversion Process
- Reviewing PTIA Initial Analysis
- Reviewing Dependency Analysis
- Reviewing Runtime for PTIADATACONV
- Reviewing PTIA Reporting

## Understanding the PTIA Data Conversion Process

The PeopleTools Impact Analysis (PTIA) process uses many pieces of the previous style data conversion delivered in PeopleSoft 9.1 applications and lower. For example, PTIA uses the Application Engine section grouping and sequencing in the PS\_PTIA\_DCAEPGMS table for its dependency modeling. The PTIA process also uses the terminology – *root or top section*. A *root or top section* is an Application Engine section defined in PS\_PTIA\_DCAEPGMS. 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 Application Engine call section step.

The PTIA process includes analyzing the insert, update, and delete SQL steps in your data conversion to determine the Source and Target tables and state records that are used. This includes analyzing dynamic SQL, App Classes, SQLExec's, and platform-specific code.

The Application Engine program gathers a list of Application Engine sections required for data conversion from a given upgrade path. These sections are analyzed and SQL statements are extracted and stored in the Application Engine 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 Application Engine Analyzer repository. PTIA allows the Application Engine data conversion to run out of the box on a number of threads.

There are two types of analysis for PTIA: initial and dependency. This section will describe both analysis types in detail.

## Reviewing PTIA Initial Analysis

This section discusses:

- Understanding Initial Analysis
- Reviewing Data Conversion Query Parsing
- Reviewing Custom Data Conversion Code
- Reviewing Table Usage Information
- Reviewing Non Parsable SQL
- Reviewing the Data Conversion Repositories

### Understanding Initial Analysis

The first part of the PTIA process is the PTIAANALYSIS Application Engine, also known as the Application Engine Analyzer. PTIAANALYSIS accepts one parameter for the upgrade path, and then queries PS\_PTIA\_DCAEPGMS to retrieve all the groups and sections for that upgrade path, ordering by group and sequence. Starting with the first group and first sequence, PTIAANALYSIS parses each Application Engine 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\_PTIA\_ANALYSIS table for each Application Engine Section, Step, and Action it comes across. PTIAANALYSIS maintains a counter as it goes and increments the counter as it writes each Action to the PS\_PTIA\_ANALYSIS table. By the end of this first task, the PS\_PTIA\_ANALYSIS table will describe the entire upgrade from top to bottom, from the first Application Engine section in the first Upgrade Group to the last section in the last Upgrade Group. By querying the PS\_PTIA\_ANALYSIS table and ordering by PTIA\_AESTMTSEQ, the whole will be described, including any nested call sections.

It is important to note that the PS\_PTIA\_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 PTIA 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 PTIAANALYSIS Application Engine reads the data conversion code for your defined upgrade path (where the path is defined in the PS\_PTIA\_DCAEPGMS table with PTIA\_UPG\_CONV\_TYPE= "MAIN").

The Application Engine 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 PTIAANALYSIS 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\_PTIA\_DTLIDSQLS, which stores a reference to PS\_PTIA\_ANALYSIS, along with the SQL statements associated with each Step Action. In the case of PeopleCode, there may be many rows in the PS\_PTIA\_DTLIDSQLS table for each PeopleCode reference in PS\_PTIA\_ANALYSIS. In addition, a second shadow table, called PS\_PTIA\_DTLIDSQLSR, is also populated during action type analysis. The only difference between PS\_PTIA\_DTLIDSQLS and PS\_PTIA\_DTLIDSQLSR is that PS\_PTIA\_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 =
%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 SQL server 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\_PTIA\_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\_PTIA\_DTLIDTBLS table. The first row would be for the PS\_BEN\_DEFN\_COST table with an PTIA\_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 PTIA\_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.

### Reviewing Custom Data Conversion Code

You can include custom data conversion code in the Initial Analysis and subsequent steps in the PTIA process by adding a row (or rows) to the PS\_PTIA\_DCAEPGMS table for each custom Application Engine section that is to be executed, where a row is defined as PTIA\_UPG\_PATH, PTIA\_UPG\_GROUP, SEQ\_NUM, AE\_APPLID, AE\_SECTION, ACTIVE\_FLAG, PTIA\_UPG\_CONV\_TYPE, PTIA\_UPG\_GROUP\_LVL.

### 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 PTIA reports, such as PTIA0001.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\_PTIA\_DUAL, PS\_PTIA\_COMMON\_AET, PS\_PTIA\_NORECNAME, or PS\_PTIA\_STATE\_AE 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
- 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.

### Reviewing Non Parsable SQL

The data conversion analysis process may mark certain SQL statements as non parsable. This designation refers to SQL statements that the Application Engine Analysis process could not correctly process. When a SQL statement is marked non parsable, there are three options that you can use:

- Modify the SQL so that the Application Engine Analyzer can process the statement. The following table compares sample non parsable and parsable SQL statements:

| NON PARSABLE SQL                                                                            | PARSABLE SQL                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| UPDATE %Table(%BIND(RECNAME)) SET<br>RELATIONSHIP = 'C' WHERE RELATIONSHIP<br>IN ('S', 'D') | <ul style="list-style-type: none"> <li>– UPDATE %TABLE(BN_834_MEMBER) SET<br/>RELATIONSHIP = 'C' WHERE<br/>RELATIONSHIP IN ('S', 'D')</li> <li>– UPDATE %TABLE(DEP_BEN_EFF) SET<br/>RELATIONSHIP = 'C' WHERE<br/>RELATIONSHIP IN ('S', 'D')</li> <li>– UPDATE %Table(EMERGENCY_CNTCT)<br/>SET RELATIONSHIP = 'C' WHERE<br/>RELATIONSHIP IN ('S', 'D')</li> </ul> |

- For non parsable SQL statements in PeopleCode, add an override line directly above the non parsable 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 non parsable.

**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.

**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: <ul style="list-style-type: none"><li>– REMSQLANALYSIS:T:&lt;Tgt Table&gt;,&lt;Tgt Table&gt;:S:&lt;SRC Table&gt;,&lt;SRC Table&gt;;</li><li>– REMSQLANALYSIS:T::S:&lt;SRC Table&gt;,&lt;SRC Table&gt;;</li><li>– REMSQLANALYSIS:T:&lt;Tgt Table&gt;,&lt;Tgt Table&gt;:S;;</li></ul> |

| Syntax                                                                                                                                      | Sample Override Lines                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| When Source and/or Target Tables are determined based on a query                                                                            | <p>For example:</p> <ul style="list-style-type: none"> <li>– REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:[table name];</li> <li>– REM SQLANALYSIS:T:&lt;Tgt Table&gt;,&lt;Tgt Table&gt;:S:%SQL(SQLid [, paramlist]);</li> <li>– REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S: %SQL(SQLid [, paramlist]);</li> <li>– REM SQLANALYSIS:T::S:%SQL(SQLid [, paramlist]);</li> <li>– REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S;;</li> </ul> <p>Where:</p> <p><i>SQLid</i>: Specify the name of an existing SQL definition.</p> <p><i>paramlist</i>: 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.</p> <p><b>Note:</b> The paramlist arguments must be static values. Variable values in the paramlist are not permitted.</p> <p><b>Note:</b> The Query is resolved at the time the Data Conversion Analysis is executed. It is NOT resolved during the Data Conversion Runtime.</p> <p><b>Note:</b> The Query must return one or more valid RECNAME values. No other return results are permitted.</p> |
| Where there is no Source or Target table to be defined an/or the non parsable SQL is to be excluded from the table and dependency analysis. | <p>REMSQLANALYSIS:T::S:PS_PTIA_NORECNAM E;</p> <p><b>Note:</b> The “REMSQLANALYSIS:T::S;” syntax is not a valid override and will be marked as “Invalid” by the PTIAANALYSIS Program.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

- Leave the SQL as it is. This results in the non parsable SQL being marked as “dependent” on all steps that exist prior to it, and all steps subsequent to the non parsable 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.

Analysis information is stored in the following tables:

- PS\_PTIA\_DCAEPGMS
- PS\_PTIA\_ANALYSIS
- PS\_PTIA\_ANALYSISTX
- PS\_PTIA\_DATACONV
- PS\_PTIA\_DTLIDSQLS
- PS\_PTIA\_DTLIDSQLSR
- PS\_PTIA\_DTLIDTBLS
- PS\_PTIA\_RUNDEPEND
- PS\_PTIA\_SECDEPEND
- PS\_PTIA\_SECLISTTMP
- PS\_PTIA\_STEPDEPEND

The following Analysis tables make up the PTIA process:

### PS\_PTIA\_DATACONV

The PS\_PTIA\_DATACONV table is based on the table definition for PS\_PTIA\_DCAEPGMS. It stores the upgrade Application Engine sections for the chosen upgrade path.

| COLUMN             | DESCRIPTION                                                      |
|--------------------|------------------------------------------------------------------|
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS                        |
| PTIA_DBTYPE        | Stores the text equivalent of the standard DBTYPE codes          |
| PTIA_UPG_GROUP     | Upgrade Group                                                    |
| PTIA_UPG_GROUP_LVL | Upgrade Group Level                                              |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                                     |
| SEQ_NUM            | Upgrade Sequence Copied from PS_PTIA_DCAEPGMS                    |
| AE_APPLID          | Upgrade Application Engine Copied from PS_PTIA_DCAEPGMS          |
| AE_SECTION         | Upgrade Application Engine Section Copied from PS_PTIA_DCAEPGMS  |
| ACTIVE_FLAG        | Active Flag Copied from PS_PTIA_DCAEPGMS                         |
| PTIA_RUNDURATION   | Elapsed time for this section to run during data conversion      |
| PTIA_RUNSTATUSFLAG | Run Status Flag (Y-complete, N-not run yet, R-Running, F-Failed) |
| PTIA_GUID          | GUID generated by the Data Conversion runtime engine             |

### PS\_PTIA\_ANALYSIS

This is the main analysis table. The Application Engine Analyzer (PTIAANALYSIS) writes a row to this table for every Action in each Root Section of the specified upgrade path.

| COLUMN             | DESCRIPTION                                                                       |
|--------------------|-----------------------------------------------------------------------------------|
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS                                         |
| PTIA_DBTYPE        | Stores the text equivalent of the standard DBTYPE codes                           |
| PTIA_UPG_GROUP     | Upgrade Group                                                                     |
| PTIA_UPG_GROUP_LVL | Upgrade Group Level                                                               |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                                                      |
| SEQ_NUM            | Upgrade Sequence copied from PS_PTIA_DCAEPGMS                                     |
| PTIA_TOPAEAPPLID   | Upgrade Application Engine copied from PS_PTIA_DCAEPGMS                           |
| PTIA_TOPAESECTN    | Upgrade Application Engine Section copied from PS_PTIA_DCAEPGMS                   |
| PTIA_TOPAESTEP     | Upgrade Section Step                                                              |
| PTIA_TOPAESEQNUM   | Upgrade Section Sequence Number                                                   |
| PTIA_AELEVEL       | Nesting level for Call Section                                                    |
| AE_APPLID          | Actual Application Engine Program (same as PTIA_TOPAEAPPLID if PTIA_AELEVEL is 1) |
| AE_SECTION         | Actual Section (same as PTIA_TOPAESECTN if PTIA_AELEVEL is 1)                     |
| AE_STEP            | Actual Step (same as PTIA_TOPAESTEP if PTIA_AELEVEL is 1)                         |
| AE_SEQ_NUM         | Actual Seq Num (same as PTIA_TOPAESEQNUM if PTIA_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                    |
| PTIA_STMTTYPENUM   | Numeric identified for AE_STMT_TYPE (used for ordering step actions)              |
| PTIA_AESTMTSEQ     | Sequence used to order the steps actions for the whole upgrade                    |
| AE_REUSE_STMT      | Standard Application Engine Reuse Statement flag                                  |
| AE_DO_SELECT_TYPE  | Standard Application Engine Do Select Type                                        |
| DETAIL_ID          | Section.Step.Action identifier used as a key to most PTIA tables                  |
| PTIA_INFO1         | Extra Information mostly related to FUNCLIB calls                                 |

| COLUMN           | DESCRIPTION                                                        |
|------------------|--------------------------------------------------------------------|
| PTIA_INFO2       | Extra Information mostly related to FUNCLIB calls                  |
| PTIA_INFO3       | Extra Information mostly related to FUNCLIB calls                  |
| PTIA_INFO4       | Extra Information mostly related to FUNCLIB calls                  |
| PTIA_INFO5       | Extra Information mostly related to FUNCLIB calls                  |
| SQLID            | For SQL step, the SQLID of the SQL this step action executes       |
| PTIA_STMTDESCR   | Description copied from Application Engine Step Description        |
| PTIA_HASPARENTS  | This Step has dependencies on other one or more other Steps        |
| PTIA_HASCHILDREN | One or more other Steps have a dependency on this step             |
| PTIA_HASWHERE    | The SQL has a where clause – Mostly used by PeopleSoft Development |

**PS\_PTIA\_DTLIDSQLS**

This table holds a reference to every SQL in the conversion code for the specified upgrade path.

| COLUMN             | DESCRIPTION                                                                   |
|--------------------|-------------------------------------------------------------------------------|
| PTIA_GUID          | GUID generated by the Data Conversion runtime engine                          |
| DETAIL_ID          | Section.Step.Action identifier used as a key to most PTIA tables              |
| AE_APPLID          | Actual Application Engine Program                                             |
| DBTYPE             | DBTYPE                                                                        |
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS                                     |
| PTIA_DBTYPE        | Text equivalent of the standard DBTYPE codes                                  |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                                                  |
| PTIA_SQLNUM        | SQL Number, for PeopleCode there may be many SQL statements                   |
| PTIA_AESTMTLEN     | Length of the text of the SQL statement                                       |
| PTIA_OBJ_TYPE      | S-SQL or P-PeopleCode                                                         |
| TABLE_NAME         | Main Table in the SQL Statement, Blank if SQL is SELECT with many tables      |
| PTIA_DMLACTION     | INSERT, UPDATE, DELETE, SELECT etc                                            |
| PTIA_LINENUM       | Refers to the PeopleCode line number where the SQL is defined                 |
| PTIA_SQLPASSDPARSE | Indicates whether SQL parser was able to successfully parse the SQL statement |
| DESCR254           | Description column                                                            |

| COLUMN           | DESCRIPTION                                       |
|------------------|---------------------------------------------------|
| PTIA_PARAMCLAUSE | Bind variable used in the SQL                     |
| PTIA_INFO1       | Extra Information mostly related to FUNCLIB calls |
| PTIA_INFO2       | Extra Information mostly related to FUNCLIB calls |
| PTIA_INFO3       | Extra Information mostly related to FUNCLIB calls |
| PTIA_INFO4       | Extra Information mostly related to FUNCLIB calls |
| PTIA_INFO5       | Extra Information mostly related to FUNCLIB calls |
| PTIA_CHUNKSEQ    | Statement Chunk Sequence                          |
| PTIA_TEXTCHUNK   | Statement executed by this Step                   |

**PS\_PTIA\_DTLIDSQLSR**

This table differs slightly from the PS\_PTIA\_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                                                      |
|--------------------|------------------------------------------------------------------|
| PTIA_GUID          | GUID generated by the Data Conversion runtime engine             |
| DETAIL_ID          | Section.Step.Action identifier used as a key to most PTIA tables |
| AE_APPLID          | Actual Application Engine Program                                |
| DBTYPE             | DBTYPE                                                           |
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS                        |
| PTIA_DBTYPE        | Text equivalent of the standard DBTYPE codes                     |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                                     |
| PTIA_SQLNUM        | SQL Number, for PeopleCode there may be many SQL statements      |
| PTIA_CHUNKSEQ      | Statement Chunk Sequence                                         |
| PTIA_TEXTCHUNK     | Statement executed by this Step                                  |

**PS\_PTIA\_DTLIDTBLS**

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                                                      |
|-----------|------------------------------------------------------------------|
| PTIA_GUID | GUID generated by the Data Conversion runtime engine             |
| DETAIL_ID | Section.Step.Action identifier used as a key to most PTIA tables |
| AE_APPLID | Actual Application Engine Program                                |

| COLUMN             | DESCRIPTION                                                    |
|--------------------|----------------------------------------------------------------|
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS                      |
| PTIA_DBTYPE        | Text equivalent of the standard DBTYPE codes                   |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                                   |
| PTIA_SQLNUM        | SQL Number, for peoplecode there may be many SQL statements    |
| RECNAME            | Record Name                                                    |
| TABLE_NAME         | Associated Table Name                                          |
| PTIA_TABLEUSAGE    | T-Target, S-Source                                             |
| PTIA_TABLETYPE     | R-Record, S-State Record, U-Upgrade Table, V-View, T-TempTable |
| PTIA_INFO1         | Extra Information mostly related to FUNCLIB calls              |
| PTIA_INFO2         | Extra Information mostly related to FUNCLIB calls              |
| PTIA_INFO3         | Extra Information mostly related to FUNCLIB calls              |
| PTIA_INFO4         | Extra Information mostly related to FUNCLIB calls              |
| PTIA_INFO5         | Extra Information mostly related to FUNCLIB calls              |

**PS\_PTIA\_STEPDEPEND**

By querying PS\_PYIA\_DTLIDTBLS and PS\_PTIA\_ANALYSIS, it is possible to determine which steps have dependencies and what those dependencies are.

| COLUMN             | DESCRIPTION                                             |
|--------------------|---------------------------------------------------------|
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS               |
| PTIA_DBTYPE        | Text equivalent of the standard DBTYPE codes            |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                            |
| PTIA_P_UPG_GROUP   | Parent Data Conversion Group                            |
| PTIA_P_UPGGRPLVL   | Parent Data Conversion Group Level                      |
| PTIA_P_SEQNUM      | Parent Application Engine Section Sequence Number       |
| PTIA_P_TOPAEAPPLID | Parent Data Conversion Application Engine Program       |
| PTIA_P_TOPAESECTN  | Parent Data Conversion Application Engine Section       |
| PTIA_P_TOPAESTEP   | Parent Data Conversion Application Engine Step          |
| PTIA_P_TOPAESEQNUM | Parent Data Conversion Application Engine Step Sequence |
| PTIA_P_AEAPPLID    | Parent Application Engine Program                       |
| PTIA_P_AESECTN     | Parent Application Engine Section                       |
| PTIA_P_AESTEP      | Parent Application Engine Step                          |

| COLUMN             | DESCRIPTION                                                  |
|--------------------|--------------------------------------------------------------|
| PTIA_P_AESEQNUM    | Parent Application Engine Step Sequence within the Section   |
| PTIA_P_AESTMTSEQ   | Parent Application Engine Step Sequence across whole upgrade |
| PTIA_P_DETAILID    | Parent Application Engine Step Detail ID                     |
| PTIA_P_SQLNUM      | Parent Application Engine Detail ID SQL Sequence             |
| PTIA_C_UPG_GROUP   | Child Data Conversion Group                                  |
| PTIA_C_UPGGRPLVL   | Child Data Conversion Group Level                            |
| PTIA_C_SEQNUM      | Child Application Engine Section Sequence Number             |
| PTIA_C_TOPAEAPPLID | Child Data Conversion Application Engine Program             |
| PTIA_C_TOPAESECTN  | Child Data Conversion Application Engine Section             |
| PTIA_C_TOPAESTEP   | Child Data Conversion Application Engine Step                |
| PTIA_C_TOPAESEQNUM | Child Data Conversion Application Engine Step Sequence       |
| PTIA_C_AEAPPLID    | Child Application Engine Program                             |
| PTIA_C_AESECTION   | Child Application Engine Section                             |
| PTIA_C_AESTEP      | Child Application Engine Step                                |
| PTIA_C_AESEQNUM    | Child Application Engine Step Sequence within the Section    |
| PTIA_C_AESTMTSEQ   | Child Application Engine Step Sequence across whole upgrade  |
| PTIA_C_DETAILID    | Child Application Engine Step Detail ID                      |
| PTIA_C_SQLNUM      | Child Application Engine Detail ID SQL Sequence              |
| PTIA_TABLENAME     | Common table referenced by the parent and child step         |
| PTIA_P_TABLEUSAGE  | Parent table usage T-Target, S-Source                        |
| PTIA_C_TABLEUSAGE  | Child table usage T-Target, S-Source                         |

**PS\_PTIA\_SECDEPEND**

This table is an aggregation of PS\_PTIA\_STEPDEPEND to the Section level.

| COLUMN             | DESCRIPTION                                       |
|--------------------|---------------------------------------------------|
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS         |
| PTIA_DBTYPE        | Text equivalent of the standard DBTYPE codes      |
| PTIA_UPG_CONV_TYPE | Conversion type: MAIN or DDL                      |
| PTIA_P_UPG_GROUP   | Parent Data Conversion Group                      |
| PTIA_P_UPGGRPLVL   | Parent Data Conversion Group Level                |
| PTIA_P_TOPSEQNUM   | Parent Application Engine Section Sequence Number |

| COLUMN             | DESCRIPTION                                                                                  |
|--------------------|----------------------------------------------------------------------------------------------|
| PTIA_P_TOPAEAPPLID | Parent Data Conversion Application Engine Program                                            |
| PTIA_P_TOPAESECTN  | Parent Data Conversion Application Engine Section                                            |
| PTIA_P_AESTMTSEQ   | Parent Application Engine Step Sequence across whole upgrade                                 |
| PTIA_C_UPG_GROUP   | Child Data Conversion Group                                                                  |
| PTIA_C_UPGGRPLVL   | Child Data Conversion Group Level                                                            |
| PTIA_C_TOPSEQNUM   | Child Application Engine Section Sequence Number                                             |
| PTIA_C_TOPAEAPPLID | Child Data Conversion Application Engine Program                                             |
| PTIA_C_TOPAESECTN  | Child Data Conversion Application Engine Section                                             |
| PTIA_C_AESTMTSEQ   | Child Application Engine Step Sequence across whole upgrade                                  |
| PTIA_DEPENDSOURCE  | Dependency Rule                                                                              |
| PTIA_DEPENDRULE    | DEPENDENT or INDEPENDENT                                                                     |
| PTIA_EXCLUDEFLAG   | Indicates whether this dependency should be excluded from the runtime dependency calculation |

#### PS\_PTIA\_RUNDEPEND

This table represents the section dependency model. You can query this table for any given data conversion Application Engine Section to determine what it depends on and what depends on it. The runtime data conversion Application Engine (PTIADATACONV) uses this table to determine which sections are eligible to run.

| COLUMN             | DESCRIPTION                                  |
|--------------------|----------------------------------------------|
| PTIA_UPG_PATH      | Upgrade Path copied from PS_PTIA_DCAEPGMS    |
| PTIA_DBTYPE        | Text equivalent of the standard DBTYPE codes |
| PTIA_P_UPG_GROUP   | Parent Data Conversion Group                 |
| PTIA_P_TOPSEQNUM   | Parent AE Section Sequence Number            |
| PTIA_P_TOPAEAPPLID | Parent Data Conversion AE Program            |
| PTIA_P_TOPAESECTN  | Parent Data Conversion AE Section            |
| PTIA_C_UPG_GROUP   | Child Data Conversion Group                  |
| PTIA_C_TOPSEQNUM   | Child AE Section Sequence Number             |
| PTIA_C_TOPAEAPPLID | Child Data Conversion AE Program             |
| PTIA_C_TOPAESECTN  | Child Data Conversion AE Section             |
| PTIA_DEPTH         | Dependency Nesting                           |

## Reviewing Dependency Analysis

This section discusses:

- Understanding Dependency Analysis
- Reviewing Data Conversion Runtime Rules

### 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\_PTIA\_DCAEPGMS table (PTIA\_UPG\_PATH, PTIA\_UPG\_GROUP, SEQ\_NUM, AE\_APPLID, AE\_SECTION, ACTIVE\_FLAG, PTIA\_CONV\_TYPE, PTIA\_UPG\_GROUP\_LVL).

### Reviewing Data Conversion Runtime Rules

The following rules are the 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 are further grouped into levels. For example, objects defined in Level 2 are dependent on objects defined in Level 1. Additionally, objects defined in Level 3 are dependent on objects defined in Level 1 and Level 2.
- Upgrade groups within the same level do not depend on each other. If Section QWE in Upgrade Group 2 updates table FFF and Section ASD in Upgrade Group 3 also updates table FFF and Upgrade Groups 2 and 3 are at the same level, there is no dependency created.
- Upgrade groups create dependencies on sections within their own upgrade group and upgrade groups of lower levels. If Section ABC in Upgrade Group 1 updates table FFF and Section QWE in Upgrade Group 2 also updates table FFF, and Upgrade Group 1 is in a lower level than Upgrade Group 2, 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 PTIAANALYSIS cannot understand, the SQL is flagged as non parsable 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 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\_PTIA\_DUAL, PS\_PTIA\_COMMON\_AET, or PS\_PTIA\_NORECNAME tables never results in a dependency.

### Example 31-1 Example of Dependency Rules Calculation

In the following example, the highlighted row (with values in *italics*) would be dependent on itself and all items in Level's MAIN-1 and MAIN-2, but not the other items in Level MAIN-3 nor items in Level DDL-1.

| PATH | GROUP | SEQ_NUM | AE_APPLID | AE_SECTION | PTIA_CONV_TYPE | GROUP_LEVEL |
|------|-------|---------|-----------|------------|----------------|-------------|
| HC89 | 1     | 260     | UPG_HR89  | HCHRS01    | MAIN           | 1           |

| PATH | GROUP | SEQ_NUM | AE_APPLID  | AE_SECTION | PTIA_CONV_TYPE | GROUP_LEVEL |
|------|-------|---------|------------|------------|----------------|-------------|
| HC89 | 1     | 265     | UPG_FG89   | FGHCS01    | MAIN           | 1           |
| HC89 | 3     | 230     | UPG_BN89   | HCBNS06    | MAIN           | 2           |
| HC89 | 4     | 165     | UPG_GPBR90 | HCBRP040   | MAIN           | 2           |
| HC89 | 7     | 40      | UPG_EP89   | HCEPS25    | MAIN           | 2           |
| HC89 | 7     | 50      | UPG_EP89   | HCEPS30    | MAIN           | 2           |
| HC89 | 10    | 20      | UPG_TL89   | HCTLK01    | MAIN           | 2           |
| HC89 | 80    | 140     | UPG_TL90   | HCTLP04    | MAIN           | 3           |
| HC89 | 80    | 160     | UPG_TL90   | HCTLP06    | MAIN           | 3           |
| HC89 | 85    | 170     | UPG_PY90   | HCPYM01    | MAIN           | 3           |
| HC89 | 85    | 180     | UPG_PY90   | HCPYP01    | MAIN           | 3           |
| HC89 | 10    | 200     | UPG_PY90   | HCPYP09    | DDL            | 1           |
| HC89 | 10    | 210     | UPG_PY90   | HCPYP10    | DDL            | 1           |

## Reviewing Runtime for PTIADATACONV

This section discusses:

- Understanding Runtime for PTIADATACONV
- Querying the PTIA Tables

### Understanding Runtime for PTIADATACONV

All runtime information for PTIADATACONV is stored in the following tables:

- PS\_PTIA\_DATACONV
- PS\_PTIA\_RUNSTATUS
- PS\_PTIA\_RUNDETAIL
- PS\_PTIA\_RUNCOUNT

The PTIADATACONV 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 PTIADATACONV in parallel, executing against a single set of dependency information. The optimal number of instances to be initiated will vary.

PTIADATACONV 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 PTIADATACONV that encountered the error will mark the step as “Failed” and stop. All other instances of PTIADATACONV 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 PTIADATACONV 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 PTIADATACONV sets up a thread in PS\_PTIA\_RUNSTATUS.
- PTIADATACONV performs a simple test to verify that there is work to do.  
If there is work to do, then PTIADATACONV 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\_PTIA\_DATACONV to “F” for the AE Section that failed.
- SQLs run to look for work to do.  
The SQL object PTIA\_FINDSECTIONTORUN finds the next eligible section to run. If the query returns nothing, we execute another SQL object called PTIA\_COUNTSECTIONSNOTDONE to count how many Sections are left to run. If PTIA\_FINDSECTIONTORUN returns no work to do and PTIA\_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.
- PTIADATACONV 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.

## Reviewing PTIA Reporting

This section discusses:

- Understanding PTIA 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
- Reviewing the Data Conversion Report

## Understanding PTIA Reporting

You can query all tables populated and leveraged by PTIA (as identified previously) through the various platform specific query tools or psquery. You can gather information in the PTIA 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 PTIA repository.

### Reviewing the Tables Referenced Report

PTIA0001.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\_PTIA\_ANALYSIS, PS\_PTIA\_DTLIDSQLS, and PS\_PTIA\_DTLIDTBLS tables. This report can be run anytime after the PTIAANALYSIS Application Engine program has run and populated the PTIA tables used by this SQR.

### Reviewing the Customization Impacts Report

PTIA0002.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\_PTIA\_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

PTIA0003.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\_PTIA\_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\_PTIA\_RUNDETAIL table has been populated for the data conversion run on which you want to report.

### Reviewing Execution Report by Section – Start Time

PTIA0004.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\_PTIA\_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\_PTIA\_RUNDETAIL table has been populated for the data conversion run on which you want to report.

### Reviewing the Execution Report by Step

PTIA0005.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\_PTIA\_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

PTIA0006.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\_PTIA\_RUNDETAIL table.

### Reviewing the Thread Duration Report

PTIA0007.SQR shows the total duration time for each thread used during the data conversion process. This report is sourced from the PS\_PTIA\_RUNDETAIL table. It can be run anytime after the PS\_PTIA\_RUNDETAIL table has been populated from the data conversion run on which you want to report.

### Reviewing the Execution Comparison Report

PTIA0008.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\_PTIA\_RUNDETAIL table. This report can be run anytime after the PS\_PTIA\_RUNDETAIL table has been populated for the data conversion runs on which you want to report.

#### Note

Run this SQR after data conversion is finished. This report will help fine-tune the data for a subsequent upgrade pass.

### Reviewing the Table Analysis Report

PTIA0009.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\_PTIA\_ALTRECDATA, PS\_PTIA\_ANALYSIS, and PS\_PTIA\_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.

### 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 (PTIA0010.sqr) to list all of these comments by the group and sequence numbers that determine how they run. The name of this report is PTIA0010.

To run PTIA0010:

1. Using SQRW, run SQR PTIA0010 on your copy of Production database.
2. When prompted for upgrade path, enter (for example):  
HC90  
CR90  
CR91

To run the report from PIA:

1. Select **PeopleTools**, and then **Lifecycle Tools**, and then **Upgrades**, and then **Run Data Conversion Report**
2. Enter the Upgrade Path and Group Number.
3. Click Run.

This example illustrates the fields and controls on the Run Data Conversion Report.

Run Data Conversion Report

Run Control ID   data   Report Manager   Process Monitor   Run

\*Upgrade Path   HC91   Group Number   1

Save   Return to Search

## Using the Upgrade Driver Program

The sequence of Application Engine sections that are run by an upgrade driver is maintained in the PS\_PTIA\_DCAEPGMS table. The Application Engine sections defined in the PS\_PTIA\_DCAEPGMS table are referred to as *root sections*.

There are two categories of Upgrade Groups:

- MAIN – Core Data Conversion
- DDL – Data Conversion sections that contain Drop Table Statements (only)

Upgrade groups contain one or more Application Engine sections that are ordered within the group by sequence number. The Application Engine program PTIADATACONV is used to run the MAIN and the DDL data conversion groups.

When data conversion is run using the PTIADATACONV 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).

This section discusses:

- Defining an Upgrade Path
- Accessing the Define Data Conversion Page

## Defining an Upgrade Path

Before you can define data conversion sections, you must define an upgrade path.

To define an upgrade path:

1. From your browser, sign in to the Demo database.
2. Select **PeopleTools**, and then **Lifecycle Tools**, and then **Upgrades**, and then **Define Upgrade Paths**.

3. The Define Upgrade Path page appears.
4. Click the **Add a New Value** tab.
5. Enter a value for **Upgrade Path**.
6. Click **Add**.
7. Select a value for **Active Flag**.
8. Enter description for the new upgrade path.
9. Click **Save**.

This example illustrates the fields and controls on the Define Upgrade Path page.

**Define Upgrade Paths**

Define Upgrade Path

---

|<
<
1-1 of 1
>
>|

View All

| Upgrade Path | Active Flag                                     | Short Description | Description |
|--------------|-------------------------------------------------|-------------------|-------------|
| CRM92        | Active <span style="font-size: 0.8em;">▼</span> | 9.2               | From 9.2    |

Save

After you have defined an upgrade path, you can add sections for the upgrade path on the Define Data Conversion page.

## Accessing the Define Data Conversion 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 Define Data Conversion page.

To access the Define Data Conversion page:

1. From your browser, sign in to the Demo database.
2. Select **PeopleTools, Lifecycle Tools, Upgrades, Define Data Conversion**.
3. The Define Data Conversion page appears.
4. Enter your upgrade path.

For example:

*HC91*

*CR91*

5. Click Search.

The Define Data Conversion page displays information for the selected upgrade path, as shown in the example below. Following the example of the Define Data Conversion page are descriptions for each section of the page.

This example illustrates the fields and controls on the Define Data Conversion page. You can find definitions for the fields and controls later on this page.

| Define Data Conversion                                                            |                                                                                            |                                                                                                                                                                                                |             |           |                                                                                           |          |             |                           |                            |                                                                                                                                                                         |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------|-------------------------------------------------------------------------------------------|----------|-------------|---------------------------|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |           | 1-25 of 142     View 100 |             |           |                                                                                           |          |             |                           |                            |                                                                                                                                                                         |
| Upgrade Path                                                                      | Program Name                                                                               | Group Number                                                                                                                                                                                   | Group Level | Conv Type | Section                                                                                   | Sequence | Active Flag | Short Description         | Long Descr                 |                                                                                                                                                                         |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | HCHCO20  | 10       | Active      | REG_TRX_REGION            | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | HCHCA01  | 20       | Active      | OWS/Claivia upgrade       | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | HCHCA40  | 30       | Active      | Company Directory Actions | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | FGHCO30  | 40       | Active      | Smart HR Template         | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | HCHCO30  | 50       | Active      | HR_TBH_SECDTL             | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HR91  | 1                                                                                                                                                                                              | 2           | Main      | HCHRA01  | 60       | Active      | HRCD SETUP TABLES         | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | HCFGA01  | 70       | Active      | PI Check                  | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HC91  | 1                                                                                                                                                                                              | 2           | Main      | HCFGA03  | 75       | Active      | GVT_JOB.PAY_UNION_FEE     | <a href="#">Long Descr</a> |   |
| HC91                                                                              | UPG_HR91  | 1                                                                                                                                                                                              | 2           | Main      | HCHRA03  | 80       | Active      | HR_MO_COMPONENT           | <a href="#">Long Descr</a> |   |

| Field or Control  | Description                                                                                                                                                                                                                                                              |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 Number      | This is the group number. All sections with the same group number will be run during the same run of the PTIA_DATACONV Application Engine program.                                                                                                                       |
| Group Level       | This is the group level.                                                                                                                                                                                                                                                 |
| Conv Type         | This is the conversion type. PTIA supports two categories: MAIN and DDL.                                                                                                                                                                                                 |
| Section           | This is the section that will be called from the PTIA_DATACONV Application Engine program.                                                                                                                                                                               |
| Sequence          | This is the order in which the sections will be called during the run of PTIA_DATACONV for the group number.                                                                                                                                                             |
| Active Flag       | This field determines whether the section will be run. If the value of this field is <i>Active</i> , the section will be run. If the value is <i>Inactive</i> , it will not be run. If you need to remove a section, change the value in this field to <i>Inactive</i> . |
| Short Description | This field contains the Section description.                                                                                                                                                                                                                             |
| Long Descr        | This field is optional.                                                                                                                                                                                                                                                  |

This section also discusses:

- Adding a new Section on the Define Data Conversion Page.
- Inactivating a Section on the Define Data Conversion Page.

### Adding a new Section on the Define Data Conversion Page

Follow the instructions below to add a new section to the Define Data Conversion 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 Define Data Conversion page:

1. From your browser, sign in to the Demo database.
2. Select **PeopleTools**, and then **Lifecycle Tools**, and then **Upgrades**, and then **Define Data Conversion**.
3. The Define Data Conversion page appears.
4. Enter your upgrade path.

For example:

HC90

CR90

5. Click **Search**.

The Define Data Conversion page displays information for the selected upgrade path.

6. Add a new row.
7. Select a value for **Program Name**.
8. Enter a value for **Group Number**.

**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\_PTIA\_DCAEPGMS 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\_PTIA\_DCAEPGMS, 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.

9. Enter values for **Group Level** and **Conv Type**.
10. Select a value for **Section** and enter value for **Sequence**.
11. Select a value for **Active Flag**.
12. The **Short Description** field is populated from the Section description. The **Long Descr** field is optional.
13. Click **Save**.

**Inactivating a Section on the Define Data Conversion Page**

Follow the instructions below to deactivate a section on the Define Data Conversion page. If a section is deactivated, the section will not run as part of data conversion.

To inactivate a section on the Define Data Conversion page:

1. From your browser, sign in to the Demo database.
2. Select **PeopleTools**, and then **Lifecycle Tools**, and then **Upgrades**, and then **Define Data Conversion**.
3. The Define Data Conversion page appears.
4. Enter your upgrade path.  
For example:  
*HC90*  
*CR90*
5. Click **Search**.
6. Find the row with the Program Name and Section you want to remove and change the value of the **Active Flag** field to *Inactive*.
7. Click **Save**.

## Working With Scripts

### Understanding Process, Scripts, and Syntax

Before Change Assistant runs SQL and Data Mover scripts, it determines whether the scripts need updating. This ensures that logs are sent to directories that are known to Change Assistant and that the scripts run properly.

The following table shows the processes, what scripts are updated, and the updated syntax.

| Process                                                       | Script Files       | Updated Syntax                                                                        |
|---------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------|
| DataMoverBootstrap<br>DataMoverUser<br>LoadBaseData           | <process name>.dms | SET LOG statements                                                                    |
| Db2 for z/OS SQL Commands<br>SQL Scripts<br>UpdatePeopleTools | <process name>.sql | CONNECT TO ...<br>SET CURRENT SQLID =                                                 |
| Oracle SQL Commands<br>SQL Scripts<br>UpdatePeopleTools       | <process name>.sql | WHENEVER SQLERROR EXIT<br>SET ECHO ON<br>SET TIME ON<br>SPOOL...<br>SPOOL OFF<br>EXIT |

### Running Scripts Outside of Change Assistant

If you are running a script outside of Change Assistant, keep in mind that the default behavior of Change Assistant is to stop when any errors are encountered. To replicate that behavior outside of Change Assistant, you will need to run the script using the correct options. The following table displays the command line options required per database platform to either stop at errors or continue when errors are encountered.

| Database | Stop/Continue at Errors                                                                                                                                                                                                                                             |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Oracle   | Exit on error:<br><sqltool> <accessID>/<br><password>@<dbname>@<scriptname><br>Prepend script with: WHENEVER SQLERROR EXIT<br>Continue on error:<br><sqltool> <accessID>/<br><password>@<dbname>@<scriptname><br>Prepend script with: WHENEVER SQLERROR<br>CONTINUE |

| Database             | Stop/Continue at Errors                                                                                                                                                                                                                                                           |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Db2 for z/OS         | Exit on error:<br><sqltool> /c /w /i DB2 -tvf <script name> -z <log name> -s<br>Continue on error:<br><sqltool> /c /w /i DB2 -tvf <script name> -z <log name>                                                                                                                     |
| Microsoft SQL Server | Exit on error:<br><sqltool> -U <accessID> -P <password> -s <server name> -D <database name> -i <script name> -o <log name> -e -n -l -b<br>Continue on error:<br><sqltool> -U <accessID> -P <password> -s <server name> -D <database name> -i <script name> -o <log name> -e -n -l |

# Modifying Step Properties and Parameters

## Step Types

When creating custom steps, select one of these step types.

### Note

When creating step types that Application Designer executes, such as Build Project or Compare and Report, if there are specific settings that need to be set for Application Designer, make sure to specify those using the **Build**, **Upgrade**, or **Object Types** buttons that appear to the right of the **Step Type** drop-down list box. Use these buttons to save any necessary settings to the Change Assistant template. At run time, any Application Designer settings saved in the template override the current settings for Application Designer on the machine where an Application Designer process runs.

| Step Type          | Definition                                                                                         |
|--------------------|----------------------------------------------------------------------------------------------------|
| Application Engine | Runs the Application Engine process indicated by the Script/Procedure value under Step Properties. |

| Step Type                       | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ApplicationEngineWithRunControl | <p>Runs an Application Engine process with run controls. Use the Options button to select the application engine program and enter the run control parameters.</p> <p>ADS application engine process PTADSAEPRCS is used to copy an ADS project a a file, copy an ADS project from a file, validate an ADS project from file, or compare an ADS project from a file.</p> <p>For an example of ADS Compare/Copy see <a href="#">Setting AE With Run Control Options for ADS Compare/Copy</a></p> <p>Global Payroll (GP) application engine programs are used to move GP rules and data between databases. There are 7 application engine programs available. The same parameters are used for all the GP application engine programs. Run Control ID needs to be the same name as the Package ID. Package ID is the Package ID of the rule package. Version indicates if this package is to be versioned, the default is Y.</p> <p>For an example of GP-Import Rule see <a href="#">Setting Global Payroll Options</a></p> <p>Search Framework - Schedule Index runs the application engine program PTSF_SCH_INDEX to build a Search Framework search index. The run control options are the same as the Build Search Index page.</p> <p>For an example of Schedule Search Index see <a href="#">Setting Search Framework Options for AE With Run Control</a> For more information on search indexes see Search Technology: Building Search Indexes.</p> <p>The Logging Suffix option can be used to create a unique log file for the step.</p> |
| Build Project                   | <p>Builds the project specified in the step properties parameter as #Project= (for example, #Project=ALLTABS). The project is built through the PeopleTools command line.</p> <p>Use the Build button to select options based on the instructions in the update documentation for your product and path.</p> <p><b>Note:</b> The Build dialog box that appears displays identical options to Application Designer.</p> <p>See Application Designer Developer's Guide: Selecting Build Options and Running the Build Process.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Step Type          | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Compare And Report | <p>Runs the project compare (which produces compare reports) process using the project specified in the step properties parameter as #Project= (for example, #Project=ALLTABS). The compare is performed through the PeopleTools command line.</p> <p>For the Compare and Report and all Copy ... step types, use the Upgrade button to select the appropriate options, which are identical to those provided for Upgrade Options in Application Designer.</p> <p>See Lifecycle Management Guide: Setting Upgrade Options.</p>                                                                                                                    |
| Compare from file  | <p>Runs the project compare (which produces compare reports) process using the project specified in the step properties parameter as #Project= (for example, #Project=PROJECT1). The compare is performed through the PeopleTools command line.</p> <p>Use the Upgrade button to select the definition types to compare and enter the Import/Export Directory that contains the file.</p> <p>Use the Options button on the Compare from File dialog box to select the appropriate options, which are identical to those provided for Upgrade Options in Application Designer.</p> <p>See Lifecycle Management Guide: Setting Upgrade Options.</p> |
| Compile PeopleCode | <p>Compiles PeopleCode based on database or project.</p> <p>Use the Options button to select the PeopleCode to compile. For the database, you can select either all PeopleCode or just directive PeopleCode. For a project select Project and enter the project name.</p>                                                                                                                                                                                                                                                                                                                                                                         |
| Copy Database      | <p>Copies a project from the source database to the target database as specified under the Step Properties. The project used is the one specified in the step properties parameter as #Project= (for example, #Project=ALLTABS). The copy is performed through the PeopleTools command line.</p>                                                                                                                                                                                                                                                                                                                                                  |
| Copy from file     | <p>Copies a project from a file. This is used in conjunction with the Copy To File. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).</p> <p>Use the Upgrade button to select the definition types to copy and enter the Import/Export Directory that contains the file.</p>                                                                                                                                                                                                                                                                                                            |

| Step Type                    | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Copy to file                 | <p>Copies a project to a file. This is used in conjunction with the Copy From File option. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).</p> <p>Use the Upgrade button to select the definition types to copy and enter the Import/Export Directory for the file.</p>                                                                                                                                                                                                                                                                                                                                                  |
| Create Customization Project | <p>Creates a customization project within Change Assistant. Use the Options button to launch the Create Project dialog box where you can select any combination of definition types to include in the project, such as pages, records, fields and so on, as well as the user IDs. You can enter multiple user IDs separated by commas.</p> <p>The customization project will include all managed objects for the object types selected that have any of the user IDs selected as the last user ID for the object. If user ID all is selected, the project will contain all managed objects for the object types selected where the last user ID for the object is not "PPLSOFT".</p> |
| Create project               | <p>Creates a project within Change Assistant. Use the Object Type button to launch the Create Project dialog box where you can select any combination of definition types to include in the project, such as pages, records, fields and so on.</p> <p><b>Note:</b> If you select Pages, the system inserts all the page types into the project, including pages, subpage and secondary pages.</p>                                                                                                                                                                                                                                                                                    |
| Merge project                | <p>Merges two project definitions.</p> <p>For example, this is used in upgrades during the "Merge IB Project" step, which merges pre and post-PeopleTools 8.48 Integration Broker metadata.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Data Mover-Bootstrap         | Runs Data Mover scripts as the access ID specified in the credentials panel in the Apply Wizard (bootstrap mode).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Data Mover-User              | Runs Data Mover scripts as the user ID specified in the credentials panel in the Apply Wizard (non-bootstrap mode).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| DBTSFIX                      | e(Applies to Db2 for z/OS and Oracle). Change Assistant determines the source and target releases of the databases defined under Step Properties as Source and Target. Once this is completed, Change Assistant determines which release scripts need to be generated by the DBTSFIX sqm to produce release scripts for your environment.                                                                                                                                                                                                                                                                                                                                            |

| Step Type      | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deploy file    | <p>Deploys files in change packages to different servers.</p> <p><b>Note:</b> COBOL files are deployed to src/cbl for non-Windows platform.</p> <p>When you select the DeployFile type, an Additional Settings button is available to set:</p> <ul style="list-style-type: none"> <li>File Reference ID</li> <li>File Type Code</li> </ul>                                                                                                                                                                                                                                       |
| FileCopy       | <p>Enables you to copy files or directories.</p> <p>File Copy properties include:</p> <ul style="list-style-type: none"> <li>Source Path</li> <li>Destination Path</li> <li>Overwrite Existing Files check box.</li> </ul> <p>The Source and Target Paths can be defined as:</p> <ul style="list-style-type: none"> <li>actual paths for example: <i>C:\temp</i></li> <li>variables for example: <i>%STAGINGDIRECTORY%</i></li> <li>combination of variables and fixed paths for example: <i>%STAGINGDIRECTORY%\IMAGE\</i></li> </ul>                                            |
| ExecuteProcess | <p>Enables you to include custom processes, such as bat files, that you can run as part of a Change Assistant job.</p> <p>Enter the file path to the file in the Parameters edit box. For example, if you want to run <i>backup.bat</i>, enter the following in the Parameters edit box:</p> <p><i>c:\bat\backup.bat</i></p> <p><b>Note:</b> Your custom file needs to be able to close without needing human interaction. Change Assistant does not officially recognize the step as being successfully completed until the processes ran by the bat file have been closed.</p> |
| ExportTemplate | <p>This step exports the current template.</p> <p>Typically this step would be included in a Update change package.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Load Base Data | <p>Change Assistant determines the source and target releases when running either the DBTSFIX or UpgradePeopleTools steps (depending on your database type). Once these are determined, Change Assistant will dynamically define which Load Base Data scripts need to be run for the original target release and the languages that you have installed.</p>                                                                                                                                                                                                                      |
| Manual Stop    | <p>Defined as a step you must run manually. Change Assistant automatically sets the run status to Stop. After you have manually completed the step, you must change the Job Status to Complete.</p>                                                                                                                                                                                                                                                                                                                                                                              |

| Step Type        | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ProcessScheduler | <p>Runs the specified upgrade process through Process Scheduler. To further define the step, you use these <i>required</i> parameters:</p> <pre>#USE_PRCs_SERVER= #PROCESS_TYPE= #PROCESS_NAME= #RUNCONTROLID= #NUM_INSTANCES=</pre> <p><b>Note:</b> If you don't specify the value to each parameter correctly, the step will fail.</p> <p>Example: To run one instance of an Application Engine program on SERVER1, specify parameters as:</p> <pre>#USE_PRCs_SERVER=SERVER1 #PROCESS_TYPE=Application Engine #PROCESS_NAME=MYAE #RUNCONTROLID=TEST #NUM_INSTANCES=1</pre> <p>Example: To run three instances of an SQR report (XRFWIN) on SERVER2, specify parameters as:</p> <pre>#USE_PRCs_SERVER=SERVER2 #PROCESS_TYPE=SQR Report #PROCESS_NAME=XRFWIN #RUNCONTROLID=MYID #NUM_INSTANCES=3</pre> <p>See <a href="#">Step Parameters</a>.</p> |
| PTFTTest         | <p>This step is used to run a PTF test. Use the following parameters:</p> <ul style="list-style-type: none"> <li>• #TST - test name</li> <li>• #TC - test case</li> <li>• #PFX - test case prefix</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| SQL Command      | <p>Runs the SQL command defined in the Parameters value under the Step Properties. Change Assistant runs the command using the SQL Query tool specified in the Database Configuration dialog box.</p> <p>For most SQL Query Tools, Change Assistant stops on an error.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| SQL Script       | <p>Runs the SQL script defined in the Script/Procedure value under the Step Properties. Change Assistant runs the script using the SQL Query tools specified on the Database Configuration.</p> <p>For most SQL Query Tools, Change Assistant stops on an error.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Step Type                   | Definition                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SQL Script DBO              | <p>Runs the SQL Script defined in the Script/Procedure value under the Step Properties, using the DB Owner ID.</p> <p>The DB Owner and password is set for the database when the <i>Set DB Owner Credentials</i> is selected on the database definition.</p>                                                                                               |
| SQR Report                  | <p>Runs SQRs using the pssqr command line. If parameters are included in the Parameters section of the step properties, Change Assistant will obtain the SQR settings from the database definition.</p> <p>See <a href="#">Setting SQR Report Output Options</a></p>                                                                                       |
| SyncDatabaseInfoToCA        | <p>This step updates all of the target information to Change Assistant.</p> <p>This step will run as part of the Cleanup and Administrative tasks in the Change Assistant Job.</p>                                                                                                                                                                         |
| SyncDatabaseInfoToPUMSource | <p>This step is only used for PUM updates. If the user selects Yes on the Synchronize Target Metadata (Requires Source) radio button on the Change Package Settings page, this step is executed in the job to update all of the target database information to the PI.</p>                                                                                 |
| UpdateChangePackage         | <p>UpdateChangePackage is a specialized function within the Change Packager relating to the updating of change packages created using Update Manager.</p>                                                                                                                                                                                                  |
| UpdateCurrentHomes          | <p>This step updates the database Current Homes PS_HOME information by setting the Current PS_HOME to the value of the New PS_HOME for Database definition associated to the DB Orientation (Source or Target) of the step. It does not update the PS_APP_HOME or PS_CUST_HOME.</p> <p>Typically this step would be included in a PeopleTools Upgrade.</p> |
| UpgradePeopleTools          | <p>Change Assistant determines the source and target releases of the databases defined under Step Properties as Source and Target. Once this is completed, Change Assistant then determines which Release scripts to run in order to upgrade your PeopleTools release from the original source release to the new target release.</p>                      |

**Note**

There is no limitation to the number of steps you can add to a template.

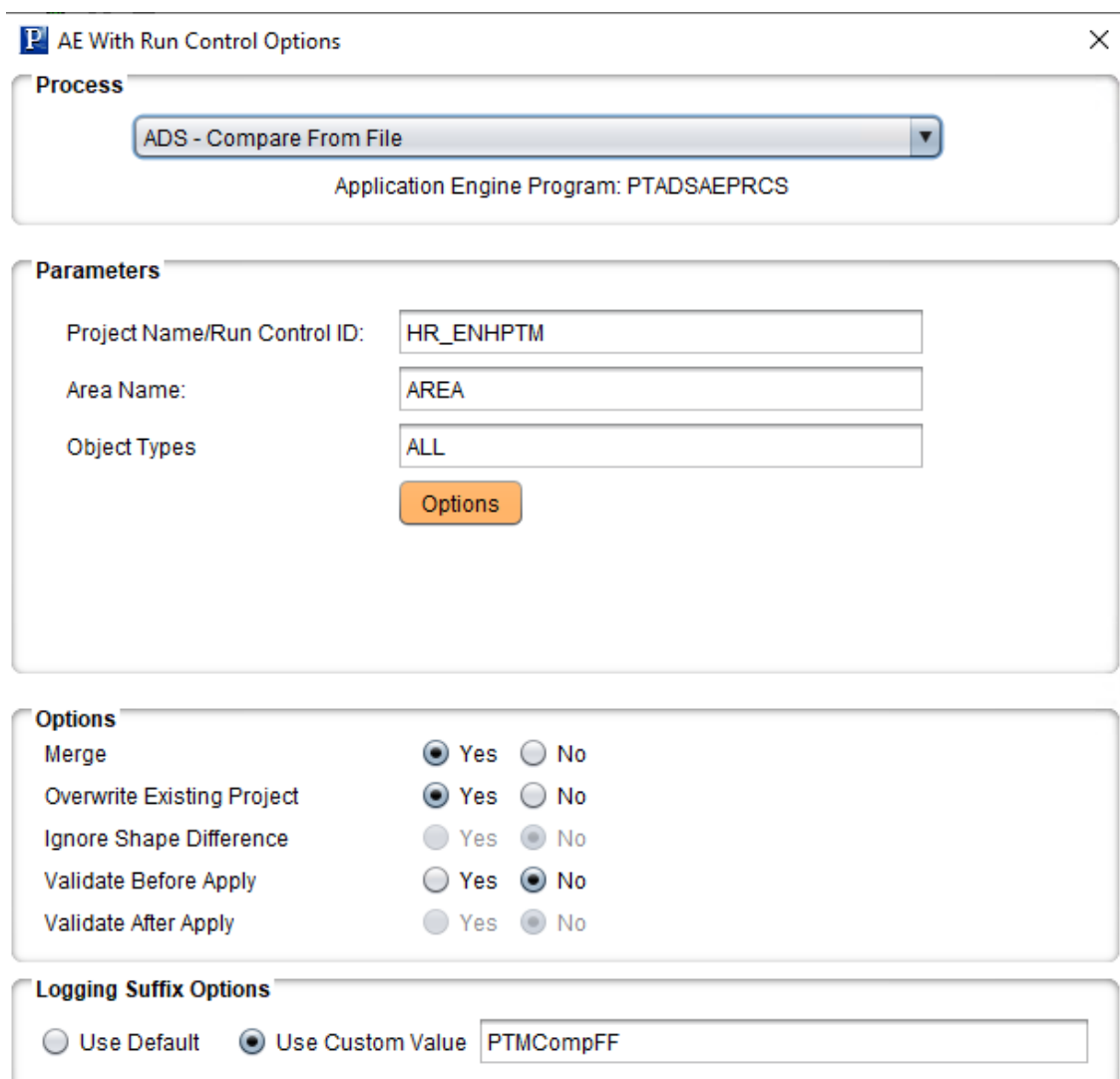
## Setting AE With Run Control Options for ADS Compare/Copy

The application engine process PTADSAEPRCS is used to copy an ADS project a a file, copy an ADS project from a file, validate an ADS project from file, or compare an ADS project from a file.

To set the AE run control options:

1. Insert a new step in the template and select Type *ApplicationEngineWithRunControl* or open an existing step with the type *ApplicationEngineWithRunControl*.
2. Make sure the orientation is set correctly.
  - Source is used for Copy to File.
  - Target is used for Compare From File and Copy From File.
3. Click the Options button.

This example illustrates the fields and controls on the AE With Run Control Options page. You can find definitions for the fields and controls later on this page.



**AE With Run Control Options**

**Process**

ADS - Compare From File

Application Engine Program: PTADSAEPRCS

**Parameters**

Project Name/Run Control ID: HR\_ENHPTM

Area Name: AREA

Object Types: ALL

Options

**Options**

Merge ☒ Yes ☐ No

Overwrite Existing Project ☒ Yes ☐ No

Ignore Shape Difference ☐ Yes ☒ No

Validate Before Apply ☐ Yes ☒ No

Validate After Apply ☐ Yes ☒ No

**Logging Suffix Options**

☐ Use Default ☒ Use Custom Value PTMCompFF

| Field or Control                        | Description                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Process</b>                          | Select the AE process, For ADS, the options are: <ul style="list-style-type: none"> <li>• Compare From File</li> <li>• Copy to File</li> <li>• Copy From File</li> <li>• Validate From File</li> </ul>                                                                                                                  |
| <b>Project Name/Run Control</b>         | Enter the ADS Project Name. The project name is also used as the run control and is automatically populated in the Run Control ID.                                                                                                                                                                                      |
| <b>Area Name</b>                        | Enter the name of the area (folder) for the file. When you select Copy to File, the file will be written to the Staging directory defined for the job in a folder PTADSAEPRCS\<area name>. For example:<br>D:\Staging\PTADSAEPRCS\TOOLS                                                                                 |
| <b>Languages</b>                        | Select the languages                                                                                                                                                                                                                                                                                                    |
| <b>Include Language Neutral Objects</b> | Select to include language neutral objects (COMMON).                                                                                                                                                                                                                                                                    |
| <b>Object Types</b>                     | ALL will include all data sets in the project. To select only specific data sets, enter the data set name or names separated by comma.                                                                                                                                                                                  |
| <b>Merge</b>                            | Select Yes to merge target configurations on the Copy From File.                                                                                                                                                                                                                                                        |
| <b>Overwrite Existing</b>               | Select Yes if you want to overwrite an existing file.                                                                                                                                                                                                                                                                   |
| <b>Ignore Shape Difference</b>          | This functionality is disabled. If there is a shape change in Application owned datasets between the source and target environments the copy/compare/validate process will fail.<br>If the process fails, select the View Log option for the step, which will list the App owned dataset that needs to be synchronized. |
| <b>Validate Before Apply</b>            | Select Yes to validate the data set before it is compared or copied from file.                                                                                                                                                                                                                                          |
| <b>Validate After Apply</b>             | Select Yes if you want to check integrity after the copy.                                                                                                                                                                                                                                                               |
| <b>Logging Suffix Options</b>           | Select whether to use the default log name or enter a custom suffix value for the log file name.<br>The suffix is used to create a unique output log file name for the step.                                                                                                                                            |

**Note**

Depending on the action selected, the available options are enabled.

## Setting Global Payroll Options

Global Payroll (GP) application engine processes include:

- GP-Import Rule
- GP-Compare Rule
- GP-Compare Rule AE Report
- GP-Upgrade Rule
- GP-Import Non Rule
- GP-Compare Non Rule
- GP-Upgrade Non Rule

To set the AE run control options:

1. Insert a new step in the template and select Type *ApplicationEngineWithRunControl* or open an existing step with the type *ApplicationEngineWithRunControl*.
2. Make sure the orientation is set correctly.
  - Source is used for Copy to File.
  - Target is used for Compare From File and Copy From File.
3. Click the Options button.

This example illustrates the fields and controls on the AE With Run Control Options page. You can find definitions for the fields and controls later on this page.

AE With Run Control Options

Process

GP - Import Rule

Application Engine Program: GP\_PKG\_ADSIR

Parameters

Run Control ID:

Package ID:

Version:

Y

Logging Suffix Options

☒ Use Default

☐ Use Custom Value

| Field or Control       | Description                                                                                                                                                                                     |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Run Control ID         | Run Control ID needs to be the same name as the Package ID.                                                                                                                                     |
| Package ID             | Package ID is the Package ID of the rule package.                                                                                                                                               |
| Version                | Indicates if this package is to be versioned, the default is Y.                                                                                                                                 |
| Logging Suffix Options | <div>Select whether to use the default log name or enter a custom suffix value for the log file name.</div> <div>The suffix is used to create a unique output log file name for the step.</div> |

## Setting Search Framework Options for AE With Run Control

Search Framework- Schedule Index is used to schedule a build for the search index.

This example illustrates the fields and controls on the AE With Run Control Options page with Search Framework-Schedule Index selected. You can find definitions for the fields and controls later on this page.

**AE With Run Control Options**

**Process**

Search Framework - Schedule Index

Application Engine Program: PTSF\_SCH\_IDX

**Parameters**

Run Control ID:

Search Definition:

Execution Option: ☒ Wait for Completion ☐ Continue without Waiting

Schedule Language: ☒ Use Previous Schedule ☐ All Languages ☐ Base Language

**Logging Suffix Options**

☒ Use Default ☐ Use Custom Value

| Field or Control              | Description                                                                                                                                                                  |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Run Control ID</b>         | Enter the run control id.                                                                                                                                                    |
| <b>Search Definition</b>      | Enter the Search definition.                                                                                                                                                 |
| <b>Execution Option</b>       | Select whether to Wait for Completion or Continue without waiting.                                                                                                           |
| <b>Schedule Language</b>      | Select the schedule language.                                                                                                                                                |
| <b>Logging Suffix Options</b> | Select whether to use the default log name or enter a custom suffix value for the log file name.<br>The suffix is used to create a unique output log file name for the step. |

# Setting SQR Report Output Options

To set SQR output options:

- 1. Insert a new step in the template and select Type *SQRReport* or open an existing step with the type *SQRReport*.
- 2. Enter the report name in the Script/Procedure field.
- 3. Click the Output Settings button.

This example illustrates the fields and controls on the SQR Output Settings dialog box. You can find definitions for the fields and controls later on this page.

Output Settings

Unicode Only:

☐

Output Type:

File

Output Format:

SPF

Output File Suffix:

Run Control ID:

ADHOC

| Field or Control   | Description                                                                                                                                                                                                               |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Unicode Only       | Select this checkbox for Unicode Only.                                                                                                                                                                                    |
| Output Type        | Currently File is the only supported value and is read-only.                                                                                                                                                              |
| Output Format      | Select the output format. The allowable output values are PDF, HTML, and SPF. The default is SPF                                                                                                                          |
| Output File Suffix | Enter an output file suffix if applicable. The suffix is used to create a unique output log file name for the step. A change package may run the same SQR multiple times, the suffix will ensure unique output log files. |
| Run Control ID     | Enter the run control ID. The default is ADHOC.                                                                                                                                                                           |

- 4. Click OK.
- 5. Click OK on the step

## Step Parameters

Depending on the step type, you may need to include additional parameters in the **Parameter** edit box of the Step Properties dialog box.

| Parameter                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| #Project=                       | <p>Used primarily for functions that require a project name, like Build Project, Create Project, and Merge Project.</p> <p>For the Merge Project step type, you can specify two projects separated by a comma. For example:</p> <pre>#PROJECT=PRJ656265, PRJ656265_IB_PRE848</pre> <p>For the SQRReport step type, enter two parameters namely the project name and the filter criteria</p> <pre>#P1= PROJECTNAME #P2= FILTER</pre> |
| #Directory=                     | <p>Used when you need to run a script that is not located in the one of standard home directories defined for the environment. For example:</p> <pre>#Directory=#OutputDirectory</pre>                                                                                                                                                                                                                                              |
| #RunLocation=<br>#FileLocation= | <p>By default the scripts and processes are run on one of the current home directories defined for the environment. However if the script or process needs to run on the new release, you need to specify the new release home directories using the variable #ALL_NEW_PATHS_TGT. Example:</p> <pre>#RunLocation=#ALL_NEW_PATHS_TGT #FileLocation=#ALL_NEW_PATHS_TGT</pre>                                                          |
| #P1 through #P5=                | <p>Used to pass parameters to SQR reports, for example, TEST.sqr. In this case, you would pass the necessary value, such as:</p> <pre>#P1=#OutputDirectory</pre>                                                                                                                                                                                                                                                                    |
| #OutputDirectory=               | <p>Used to specify the Output Directory variable that is defined in the Options, Change Assistant, Directories screen.</p>                                                                                                                                                                                                                                                                                                          |
| #Type=                          | <p>Enables you to specify the type of record to insert into the project. Choose from the following record types:</p> <p>All Records, Table, View/Query, View/Derived, SubRecord, Stored Procedure, Temporary Table, Dynamic View.</p>                                                                                                                                                                                               |
| #RCID=                          | <p>Enables the user to override the run control ID used for Application Engine processes.</p>                                                                                                                                                                                                                                                                                                                                       |

| Parameter         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| #CI =             | Connect ID (Used for Data Mover – Tools).                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| #CW =             | Connect password (Used for Data Mover – Tools).                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| #EXTRACT_DMS=     | Extracts DMS export script from file (Used for Data Mover – Tools).                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| #DBSETUP=         | Extracts dbsetup DMS import script from file and database connectivity parameters (Used for Data Mover – Tools).                                                                                                                                                                                                                                                                                                                                                                                            |
| #DATLOCATION=     | Specifies the location of the .dat file (Used for Data Mover – Tools).                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| #UNICODE=         | Generates DMS script for UNICODE database (default is NON-UNICODE) (Used for Data Mover – Tools).                                                                                                                                                                                                                                                                                                                                                                                                           |
| #TABLESPACE=      | Default tablespace (PTMINITS) (Used for Data Mover – Tools, Oracle only).                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| #DBSPACE=         | Physical dbname.tablespace (PTMINIDB.TABLESPACE) ) (Used for Data Mover – Tools, DB2 z/OS only).                                                                                                                                                                                                                                                                                                                                                                                                            |
| #STOGROUP_TS=     | Storage group for tablespace (Used for Data Mover – Tools, DB2 z/OS only).                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| #STOGROUP_IDX=    | Storage group for index (Used for Data Mover – Tools, DB2 z/OS only).                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| #TABLEOWNER=      | Database owner ID (same as sqldid and tableowner) (Used for Data Mover – Tools, DB2 z/OS only).                                                                                                                                                                                                                                                                                                                                                                                                             |
| #INDEXSPC=        | Default tablespace (PTMINITS) (Used for Data Mover – Tools, Informix only).                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| #USE_PRCS_SERVER= | (Used only for ProcessScheduler step types).<br>Enter the name of the Process Scheduler server to run the step. Valid values are SERVER1 or SERVER2, which correlate to the Process Scheduler server definitions you have defined in your upgrade environment.                                                                                                                                                                                                                                              |
| #PROCESS_TYPE=    | (Used only for ProcessScheduler step types).<br>Enter the process type, as defined in Process Scheduler. For example, Application Engine, SQR Report, Data Mover, and so on.<br><b>Note:</b> This parameter is case sensitive. That is, the value must appear in the exact case as the process type in Process Scheduler. For example, for an Application Engine program, the process type parameter should appear as <i>PROCESS_TYPE=Application Engine</i> , not <i>PROCESS_TYPE=APPLICATION ENGINE</i> . |
| #PROCESS_NAME=    | (Used only for ProcessScheduler step types).<br>Enter the process name, such as DDDAUDIT.                                                                                                                                                                                                                                                                                                                                                                                                                   |

| Parameter       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| #RUNCONTROLID=  | (Used only for ProcessScheduler step types).<br>Enter the appropriate run control ID.<br><b>Note:</b> If NUM_INSTANCES is greater than one, Change Assistant will append unique sequence numbers to the end of the Run Control ID before requests are submitted to the Process Scheduler. This is required for submitting multiple instances of the same process. If NUM_INSTANCES is equal to one, Change Assistant will NOT append unique sequence numbers to the end of the Run Control ID. |
| #NUM_INSTANCES= | (Used only for ProcessScheduler step types).<br>Used by Change Assistant to schedule multiple processes through Process Scheduler as individual process requests. However, the actual number of instances simultaneously executed on the Process Server is controlled by the Max Concurrent setting for the process type in the Process Scheduler server definition.                                                                                                                           |
| #TST            | Used with the PTFTest step to identify the test                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| #TC             | Used with the PTFTest step to identify the test case.                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| #PFX            | Used with the PTFTest step to identify the test prefix.                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## Variables for All Step Types that Use Path

The order by which the PeopleTools runtime will pick up objects from the file system is as follows:

1. Staging directory
2. PS\_CUST\_HOME
3. PS\_APP\_HOME
4. PS\_HOME

Change Assistant will loop through the paths in order of precedence until it finds the first instance of the file object at which time it will execute the step.

The following variables can be used for parameters requiring a path.

| Variable        | Description                                                                     |
|-----------------|---------------------------------------------------------------------------------|
| #ALL_PATHS_TGT  | Uses the path values defined for the target database current environment.       |
| #ALL_PATHS_SRC  | Uses the path values defined for the source database current environment.       |
| #ALL_PATHS_ODMO | Uses the path values defined for the copy of demo database current environment. |
| #ALL_PATHS_PROD | Uses the path values defined for the production database current environment.   |

| Variable           | Description                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| #ALL_OLD_PATHS_TGT | Uses the path values defined for the target database old environment.                                                                                                                                                                                                                                                                                                                     |
| #ALL_PATHS_TGT_CBL | <p>The location of COBOL files differs depending on whether you are using Windows or Linux. COBOL files are stored in:</p> <ul style="list-style-type: none"><li>• PS_HOME/src/cbl/base for Windows</li><li>• PS_HOME/src/cbl for Linux</li></ul> <p>This parameter is used to find the path for COBOL files.</p> <p><b>Note:</b> This parameter is only available for #FILELOCATION.</p> |

## Platform Used in Command Line

Steps where the command line includes the platform are:

- ApplicationEngine
- ApplicationEngineWithRunControl
- BuildProject
- CompareAndReport
- CopyDatabase
- CopyFromFile
- CopyToFile
- CreateProject
- MergeProject
- DataMoverBootstrap
- DataMoverUser
- SQLCommand
- SQLScript
- SQRReport

## Consolidating Data Mover Scripts

When Change Assistant encounters a Data Mover step, it collects similar Data Mover steps below this step and generates a consolidate Data Mover script. The newly generated Data Mover script is then executed through a single data mover session.

In order to consolidate the Data Mover steps the following criteria must be met:

- On 8.56 or higher Tools version
- Identical Data Mover step type (DataMoverUser or DataMoverBootStrap)
- Identical Orientation in Step Properties (Source or Target)
- Identical Parameters value in Step Properties
- Allow for Errors = N in Step Properties

- Run Concurrently = N in Step Properties
- Step status = Run/Restart
- Step is not filtered out from job
- Continuous Data Mover steps

# Clearing Environment Management Framework Cache

## Clearing Environment Management Framework Cache Overview

To ensure consistent behavior across all the elements of the Environment Management Framework, at times, it is necessary to clear the cache stored within each element. Clearing the cache just on the web server for the Hub, for example, is not sufficient. To re-initialize the entire framework, you need to perform this cleanup on:

- All agents
- Change Assistant
- Viewer
- Hub

## When to Clear Environment Management Framework Cache

After analyzing customer environments and consulting PeopleSoft support, the following list reflects the most common situations in which it is recommended that you clear cache files:

- After applying a maintenance pack. Maintenance packs deliver a large number of files. Clearing the cache after applying a maintenance pack may increase performance for applying future updates.
- After applying a PeopleTools patch. Information related to previous PeopleTools releases stored in the cached directories can cause a variety of issues for Change Assistant.
- After receiving a warning during file deploys or during the validate process (Tools, Validate). This is typically related to cached references to peer IDs that are no longer used. Clearing the cache removes references to unused peer IDs.
- After Change Assistant hangs during re-validation. This is often a sign of cache issues.
- After receiving notifications that you need to apply prerequisites that have already been applied.

### Note

The above list reflects the most common situations when cache should be cleared, not every possible situation. If you are encountering unexpected behavior, one element of your troubleshooting should be clearing the cache.

## Clearing EMF Cache

To clear EMF cache:

1. Close the Change Assistant, stop all agents, and stop PSEMHUB.
2. Delete cache files from Change Assistant, agents, and Viewer.
  - a. Navigate to the following EMF locations:

| EMF Element      | Location                                                                                                            |
|------------------|---------------------------------------------------------------------------------------------------------------------|
| Change Assistant | Change Assistant installation location. For example,<br>c:\Program Files\PeopleSoft\Change Assistant\envmetadata    |
| Agents           | PS_AGENT_HOME\PSEMAgent\envmetadata<br><b>Note:</b> If PS_AGENT_HOME is not defined, the data is stored in PS_HOME. |
| Viewer           | PS_HOME\PSEMViewer\envmetadata                                                                                      |

- b. Delete the following directories:
    - \PersistentStorage
    - \ScratchPad
    - \transactions (if it exists)
    - \data\ids
  - c. For Change Assistant and agents only, delete the following file:
    - \data\search-results.xml
3. Delete cached files on PSEMHUB.
  - a. On the web server, navigate to PIA\_HOME\websew\peoplesoft\applications\domain\PSEMHUB\envmetadata.
  - b. Delete the files stored in these directories:
    - \scratchpad
    - \PersistentStorage
    - \transactions (if it exists)
  - c. Delete all objects in \data (files and subdirectories, but not the \data directory).  
For example,  
\data\\*.\*
4. Restart PSEMHUB.
5. Restart all agents.
6. Restart Change Assistant and Environment Management Viewer as needed.

# Troubleshooting Change Assistant and EMF

## Peer Cannot Connect to the Hub

When an Environment Management peer (typically an agent or the viewer) can't communicate with the hub, the following error messages appear in the logs and stdout:

```
Broken connection - attempting to reconnect
RemoteException while connecting to server - retrying attempt 1
RemoteException while connecting to server - retrying attempt 2
RemoteException while connecting to server - retrying attempt 3
```

The peer periodically attempts to reconnect to the hub (by default every ten seconds) with the parameters that are specified in the configuration.properties file.

### Determining the Error Condition

The peer may not be able to communicate with the hub for one of the following reasons:

- The peer is started but the hub is not started.  
The peer reconnects once the hub is started.
- The peer is started but the web server is configured to run on a different machine.  
Edit the configuration.properties file and change the hubURL parameter.
- The peer is started but the web server is configured to listen on a different port.  
Users continue to see the error messages described previously. Edit the configuration.properties file and change the port number for the hubURL parameter. Shut down and restart the peer.
- The peer is running and communicating with the hub, and the PIA web server is shut down.

Users see the broken connection error message. Once the PIA web server is started, the connection is restored.

When the peer has a pinginterval configuration parameter set to a high value (60 seconds or more), the following exception might appear in the log:

```
INFO Thread-48 org.apache.commons.httpclient.HttpMethodBase - Recoverable
exception caught when processing request WARN Thread-48
org.apache.commons.httpclient.HttpMethodBase
- Recoverable exception caught but MethodRetryHandler.retryMethod() returned
false, rethrowing exception Broken connection - attempting to reconnect
Sending pulse from 'com.peoplesoft.emf.peer:id=5'
```

This is due to an HTTP client connection timeout which does not affect functionality.

## Ensuring the Correct Configuration

To ensure that you've configured the peer (agent or viewer) to properly connect with the hub, try each of the following actions in turn:

- Ping the hub host machine.  
At a command prompt, enter `ping machinename`, using the machine name configured in the hubURL setting. You should see messages indicating a reply from the machine.
- Ping the hub host domain.  
At a command prompt, enter `ping hostdomain`, using the fully qualified domain name as it's configured in the hubURL setting; for example, `mymachine.example.com`. You should see messages indicating a reply from the machine.
- Use an IP address in the hubURL.  
In `configuration.properties`, replace the domain name in the hubURL setting with the machine's IP address, then restart the peer.
- Ensure that you specify the right port number in the hubURL.  
In `configuration.properties`, the port number in the hubURL setting must be `<PIA port>` if you set up PIA for a single server. In single server configurations, the hub uses the same port to which PIA is configured.  
  
In multi-server configurations, the hub uses the application default port, which is 8001. If you need to change this setting, it must be done in the web server configuration files.

## Agent-Specific Resolutions

If an agent is still experiencing connection difficulties, delete the following agent directories if they exist:

- `PS_HOME\PSEMAgent\envmetadata\data\ids`
- `PS_HOME\PSEMAgent\envmetadata\PersistentStorage`
- `PS_HOME\PSEMAgent\envmetadata\transactions`

### Note

You must also delete these directories after you install an additional hub on the same machine which doesn't replace the existing hub, then shut down the old hub and start the new hub using the same settings.

## Viewer-Specific Resolutions

If the viewer Java application can't connect to the hub, first ensure that you specify the right port number when launching the viewer program.

If you set up PIA for a single server, 80 is the default port number, if you set up PIA for multiple servers, 8081 is the default listening port number for PSEMHUB.

If the viewer is still experiencing connection difficulties, delete the following viewer directories if they exist:

- `PS_HOME\PSEMViewer\envmetadata\data\ids`
- `PS_HOME\PSEMViewer\envmetadata\PersistentStorage`

- `PS_HOME\PSEViewer\envmetadata\transactions`

#### ① Note

You must also delete these directories after you install an additional hub on the same machine which doesn't replace the existing hub, then shut down the old hub and start the new hub using the same settings.

## Error Initializing Agent

When starting agents, if you receive the following error message, determine whether an agent is already running:

Error initializing agent. Verify if another agent is not running on this machine or if you have the required permission to run the agent.

If the console for the agent is not visible, check the task manager for the list of Java processes that are currently running. Stop a running agent by invoking the scripts to stop the agents and then restart the desired agent.

Determine whether the agent port is available. If not, choose a different port to start the agent.

## Distributed Object Manager Errors

When running process, such as Application Engine, through the Process Scheduler (by way of Change Assistant) the following error can occur if you do not have security set appropriately for the PROCESSREQUEST.

```
Connecting to App Server: 192.0.2.1:9000
Error, exception caught: Distributed Object Manager: Page=Create Language=%2
(1,4)
```

See [Ensuring Process Scheduler Security Authentication](#).

## Cloned Databases Not Being Unique

When copying databases, it is extremely important to delete the GUID value in the new (copied) database. If not deleted, the hub will assume that the two environments are the same, leading to confusing environment records.

To resolve this, set the value of the GUID field in the PSOPTIONS table to <space> in the new database. You can insert the blank value in the PSOPTIONS table using the SQL tool at your site. The next time an application server connects to the database, the system generates a new, unique GUID.

## Large SQL Scripts Fail on Microsoft SQL Server

In some situations, depending on various factors, such as memory available on the Change Assistant workstation, large SQL scripts can fail when run against Microsoft SQL Server. For example, this can occur when running the Microsoft conversion script during an upgrade.

To resolve this issue:

- Set the step executing the SQL script to run manually.
- Split the script into at least three separate scripts and run them individually.

## Process Scheduler Logs Retrieved Using FTP Losing Formatting

When reviewing Process Scheduler files retrieved by way of FTP, in some cases formatting is lost.

This is typically an issue with the ANSI setting on the FTP server. For example, on a vsftpd server, in the vsftpd.conf file, make sure `ascii_download_enable` is set to `YES`. If not, stop the FTP daemon, modify the setting, and restart the FTP daemon. (Adjust this information as needed for your FTP server).

## Viewing Change Assistant Log Files

Change Assistant provides the following log files:

- Job log file
- Step execution logs
- Create change package log

### Job Log File

The job.log file is a consolidated file that includes all of the information entered in the Apply Wizard, as well as execution status of all the tasks and steps in the change package. There are five Apply Wizards in Update Manager action.

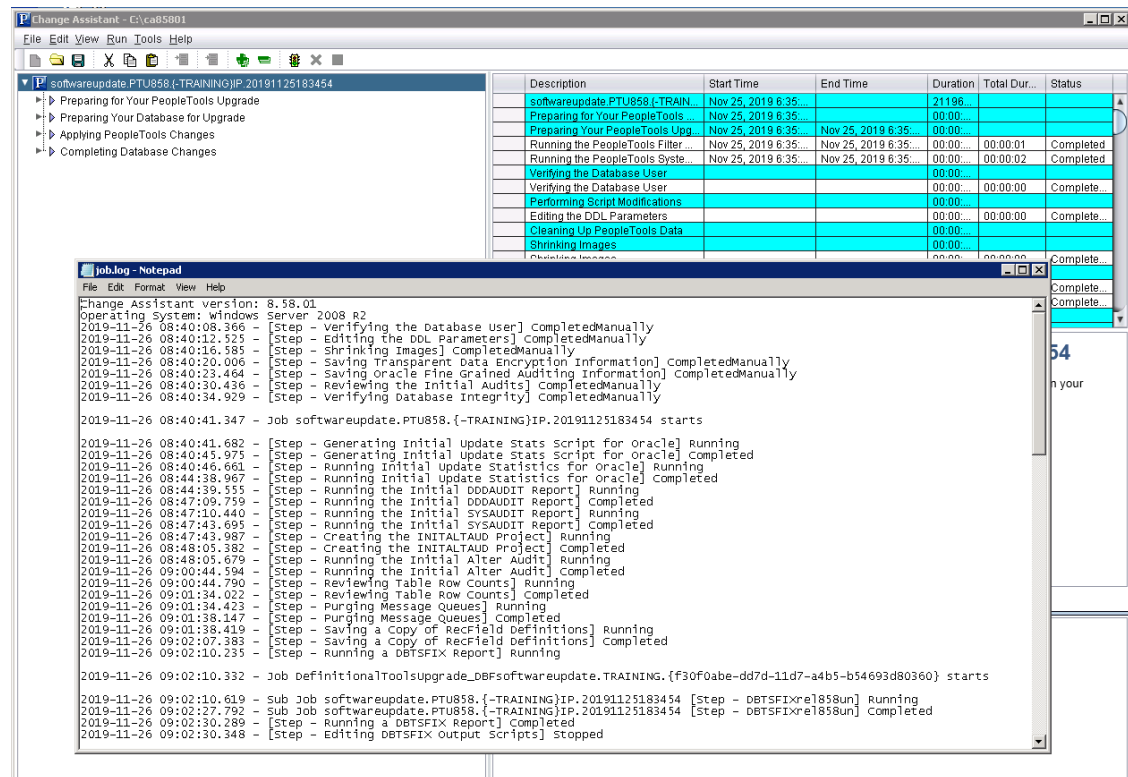
- Apply Change Package
- Apply PeopleSoft Release Patch
- Apply PeopleTools Patch
- Upgrade Tools
- Upgrade Application

The log file will contain the information on Check Compatibility, Apply Summary pages, as well as information about the Target and PUM Source environments. Once the job starts to execute, the execution status of each step will be logged. This consolidated job log can be used to check the environment settings, track the status of job, or review the job.

The job log is located in the folder generated for the change package job in the output directory defined on the Change Assistant General Settings page, for example `C:\CA\output\updPACKAGE1_1476310350534\job.log`.

You can also access the job log from Change Assistant by right-clicking on the job name and selecting View Log.

This example illustrates accessing job log from Change Assistant. Right-click on the job name and select View Log.



The job log includes:

- Check Compatibility Page
- Apply Summary Page
- PI Environment
- Step/job execution status during job execution

### Step Execution Logs

As a job executes, the logs are placed in the output directory specified in Change Assistant in a folder with the job name. For each step there several logs created:

| Log File     | Description                                               | Example                                                                                                                  |
|--------------|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| *_Search.log | Indicates whether or not the file for the step was found. | CP_BUILD_search.log<br>Searching for file of<br>bin\client\winx86\pside.exe in<br>D:\PT8.54.21_Client_ORA\ - File Found. |

| Log File  | Description                                                                                                                                          | Example                                                                                                                                                                                                                                                                                                                                               |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| *_CA.log  | Displays the command line used.                                                                                                                      | CP_BUILD_CA.log<br>Command Line:<br>D:\PT8.54.21_Client_ORA\bin\client\winx86\pside.exe -CT ORACLE -CS -CD HC920001 -CO PS -CP * -PJB PACKAGE1 -HIDE -QUIET -SS NO -SN NO -MN -LF D:\Labs\PUM\Output\softwareupdatePACKAGE1{HR92U016-HC920001}\IP\CP_BUILD_cmdline.log -CI people -CW *                                                               |
| *.log     | Output of command line execution, created by the command itself.                                                                                     | CP_BUILD.log<br>SQL Build process began on 10/13/2016 at 12:00:20 AM for database HC920001.<br>SQL Build process ended on 10/13/2016 at 12:00:25 AM. 78 records processed, 0 errors, 0 warnings.<br>SQL Build script for Create Tables written to file D:\Labs\PUM\Staging\softwareupdatePACKAGE1{HR92U016-HC920001}\IP\Scripts\CP_crttbl.sql.<br>... |
| *_cmdline | Lists command line parameters used.                                                                                                                  | CP_BUILD_cmdline.log<br>PeopleSoft Project Command Line Build Project Project Name: PACKAGE1 Tools Release: 8.54.21 2016-10-13 : 00.00.20<br>-CT Source Database Type = ORACLE<br>-CS Source Database Server =<br>-CD Source Database Name = HC920001<br>-CO Source Database Operator = PS<br>Command line process successfully completed.            |
| *_out.log | For SQR, Application Engine, Data Mover, and Filter steps this log lists parameters used and results, as well as path to output files if applicable. | RESETVERSIONS_OUT.log<br>PeopleTools 8.54.21 - Application Engine Copyright (c) 1988-2016 Oracle and/or its affiliates. All Rights Reserved Application Engine program VERSION ended normally                                                                                                                                                         |

### Create Change Package Log

Change Assistant will save information about progress and status shown on Change Assistant UI to a log file. The log file also contains basic information such as PUM Source Database, tools version, operation system type, source/target database information, download directory, tools location, and so forth.

The log for creating a change package is cpccreate log for the package. The log is placed in <output directory>\logs\createcp\<packagename>.log. For example  
C:\PUM\Output\logs\createcp\PK1.log.

The log shows the progress and status for creating the Change Package. This is an example of a cpcreate log:

```
Change Assistant version: 8.57.00
Operating System: Windows Server 2012 R2
2018-04-30 13:56:25.122 - PUM Source Database : H92CDPUM
2018-04-30 13:56:25.126 - Download Directory : C:\PUM\Downloads\
2018-04-30 13:56:25.128 - Connecting to Source Database...
2018-04-30 13:56:26.347 - Retrieving Database Information from Source
Database...
2018-04-30 13:56:37.931 - Synchronizing Source Database Information to
Database Definition in Change Assistant...
2018-04-30 13:56:39.068 - Source Tools Bin Location :
C:\PT8.57-120W\bin\client\winx86
2018-04-30 13:56:39.133 - Source Tools Release : 8.57.00
2018-04-30 13:56:39.135 - Change Package GUID : 0409985a-4cb0-11e8-b113-
b11fa0e5185f
2018-04-30 13:56:39.136 - Creating Change Package 1 of 1: PK1
2018-04-30 13:56:39.138 - Loading Project PK1
2018-04-30 13:56:39.445 - Validating File Reference ...
2018-04-30 13:56:39.447 - Copying Project to File ...
2018-04-30 13:56:47.224 - Copying Files Needed for Doc Generation...
2018-04-30 13:56:47.263 - Querying Source Environment Information...
2018-04-30 13:56:47.283 - Base Language :ENG
2018-04-30 13:56:47.292 - Installed Language :[ENG]
2018-04-30 13:56:47.301 - Application Release Label :HRMS 9.20.00.550
2018-04-30 13:56:47.302 - Creating Change Package content ...
2018-04-30 13:56:47.780 - Creating Template ...
2018-04-30 13:56:48.629 - Finalizing Change Package the first time ...
2018-04-30 13:56:48.879 - Generating Non-Managed Object Scripts : PK1
2018-04-30 13:56:48.889 - Generating Security Scripts : PK1
2018-04-30 13:56:48.922 - Updating Change Package Manifest ...
2018-04-30 13:56:53.978 - Image Type : PUM
2018-04-30 13:56:53.985 - Image Version : 25
2018-04-30 13:56:54.028 - Target Environment Tools version : 8.56.07
2018-04-30 13:56:54.043 - Target Environment Languages : [ENG]
2018-04-30 13:56:54.055 - Generating Documentation ...
2018-04-30 13:56:54.609 - Finalizing Change Package ...
2018-04-30 13:56:55.906 - Updating package status ...
2018-04-30 13:56:55.926 - Completed Successfully
2018-04-30 14:39:52.383 - Connecting to Source Database...
2018-04-30 14:39:53.725 - Retrieving Database Information from Source
Database...
2018-04-30 14:40:04.876 - Synchronizing Source Database Information to
Database Definition in Change Assistant...
```

If the create change package fails, the log will indicate *Completed with Error*. This is an example of a failed change package.

```
Change Assistant version: 8.57.00
Operating System: Windows Server 2012 R2
2018-04-30 13:12:17.121 - PUM Source Database : H92CDPUM
2018-04-30 13:12:17.126 - Download Directory : C:\PUM\Downloads\
2018-04-30 13:12:17.147 - Connecting to Source Database...
2018-04-30 13:12:18.299 - Retrieving Database Information from Source
```

```
Database...
2018-04-30 13:12:33.353 - Synchronizing Source Database Information to
Database Definition in Change Assistant...
2018-04-30 13:12:34.633 - Source Tools Bin Location :
C:\PT8.57-120W\bin\client\winx86
2018-04-30 13:12:34.700 - Source Tools Release : 8.57.00
2018-04-30 13:12:34.702 - Change Package GUID : fb7b99f8-4ca1-11e8-b113-
b11fa0e5185f
2018-04-30 13:12:34.704 - Creating Change Package 1 of 1: UDPKG1
2018-04-30 13:12:34.710 - Loading Project UDPKG1
2018-04-30 13:12:34.950 - Validating File Reference ...
2018-04-30 13:12:38.378 - Change Package was not created, see invalid File
References
```

```
Invalid File Reference(ID-UPD26637235_01_EXP_DMS,Type Code-MAINT):File path
CCL data cannot be found in source database.
Invalid File Reference(ID-UPD26637235_02_IMP_DMS,Type Code-MAINT):File path
CCL data cannot be found in source database.
Invalid File Reference(ID-UPD26637235_03_SETUP_DOC,Type Code-MAINT):File path
CCL data cannot be found in source database.
Invalid File Reference(ID-UPD26650168_PRP_SPL_DMS,Type Code-MAINT):File path
CCL data cannot be found in source database.
Invalid File Reference(ID-UPD26650179_PRP_SPL_DMS,Type Code-MAINT):File path
CCL data cannot be found in source database.
Invalid File Reference(ID-UPD26731230_PRP_SPL_DMS,Type Code-MAINT):File path
CCL data cannot be found in source database.
```

```
Total number:6
2018-04-30 13:17:40.526 - Completed with Error
```

If the change package is defined using the command line, a special date time stamp is appended to each line in the log.

```
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
```

```
C:\Users\User1>CD C:\CA
```

```
C:\CA>changeassistant.bat -MODE UM -ACTION CPCREATE -UPD CP3
PUM Source Database : H92CDPUM
Download Directory : C:\PUM\Downloads\
Retrieving Database Information from Source Database...
Synchronizing Source Database Information to Database Definition in Change
Assis
tant...
Source Tools Bin Location : C:\PT8.57\bin\client\winx86 at Mon Apr 30 17
:31:25 MDT 2018
Source Tools Release : 8.57.00 at Mon Apr 30 17:31:25 MDT 2018
Change Package GUID : 4b63e1d8-4cce-11e8-90a8-c99c39c8fa80 at Mon Apr 30
17:3
1:25 MDT 2018
Creating Change Package 1 of 1: CP3 at Mon Apr 30 17:31:25 MDT 2018
Loading Project CP3 at Mon Apr 30 17:31:25 MDT 2018
Validating File Reference ... at Mon Apr 30 17:31:25 MDT 2018
Copying Project to File ... at Mon Apr 30 17:31:25 MDT 2018
```

```

Copying Files Needed for Doc Generation... at Mon Apr 30 17:31:26 MDT 2018
Querying Source Environment Information... at Mon Apr 30 17:31:26 MDT 2018
 Base Language :ENG at Mon Apr 30 17:31:26 MDT 2018
 Installed Language :[ENG] at Mon Apr 30 17:31:26 MDT 2018
 Application Release Label :HRMS 9.20.00.550 at Mon Apr 30 17:31:26 MDT
2018

Creating Change Package content ... at Mon Apr 30 17:31:26 MDT 2018
Creating Template ... at Mon Apr 30 17:31:26 MDT 2018
Finalizing Change Package the first time ... at Mon Apr 30 17:31:27 MDT
2018
Generating Non-Manage Object Scripts : CP3 at Mon Apr 30 17:31:27 MDT 2018
Generating Security Scripts : CP3 at Mon Apr 30 17:31:27 MDT 2018
Updating Change Package Manifest ... at Mon Apr 30 17:31:27 MDT 2018
 Image Type : PUM at Mon Apr 30 17:31:29 MDT 2018
 Image Version : 25 at Mon Apr 30 17:31:29 MDT 2018
 Target Environment Tools version : 8.56.07 at Mon Apr 30 17:31:29 MDT
2018
 Target Environment Languages : [ENG] at Mon Apr 30 17:31:29 MDT 2018
Generating Documentation ... at Mon Apr 30 17:31:29 MDT 2018
Finalizing Change Package ... at Mon Apr 30 17:31:30 MDT 2018
Updating package status ... at Mon Apr 30 17:31:30 MDT 2018
Completed Successfully

C:\CA>

```

## Errors Found in Log Files

Change Assistant scans log files that are generated when various processes run, such as SQL, Data Mover, SQR, CopyDatabase and so on. The following table describes what logs are produced and what Change Assistant determines to be an error:

The log files generated by Process Scheduler are not parsed for warnings or errors. Therefore, even though Change Assistant may show a status of Complete for a Process Scheduler step type, you should review the generated log files for more details.

| Processes          | Log File               | Error                                                                    | Warning Status |
|--------------------|------------------------|--------------------------------------------------------------------------|----------------|
| Application Engine | <process name>_out.log | Restart Failed.<br>Invalid, Error.<br>Abended.<br>Abort.<br>Not Defined. | Warning.       |
| Build Project      | <process name>.log     | Error.                                                                   | Warning.       |
| CompareAndReport   |                        | Invalid PeopleCode.                                                      |                |
| CopyDatabase       |                        | Copy process cancelled.                                                  |                |
| CopyFromFile       |                        | Project <xxx> does not exist.                                            |                |
| CopyToFile         |                        |                                                                          |                |
| CreateProject      |                        |                                                                          |                |

| Processes                                                                             | Log File                                                                                                              | Error                                                                                                                                                                                                                                                   | Warning Status |
|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| DataMoverBootstrap<br>DataMoverTools<br>DataMoverUser<br>LoadBaseData                 | <process name>_out.log<br><b>Note:</b> Any logs generated by the Data Mover SET LOG statement will also be available. | Unsuccessful.<br>PSDMTX Error.                                                                                                                                                                                                                          | Warning.       |
| DBTSFIX SQRReport                                                                     | <process name>_0.out<br><process name>_out.log                                                                        | TNS Error.<br>Program Aborting.<br>Not Defined Error.                                                                                                                                                                                                   | NA             |
| Deploy File                                                                           | <process name>_out.log                                                                                                | Failure.<br><ul style="list-style-type: none"> <li>• Unable to connect.</li> <li>• Environment Management Components are Unavailable.</li> </ul> Warning status.                                                                                        | NA             |
| DSAutoGeneration<br>DSCompile<br>DSCustomReport<br>DSPatchCorrection<br>DSPatchImport | <process name>_out.log<br><process name>.log                                                                          | Failed.<br>Warning status.                                                                                                                                                                                                                              | NA             |
| DSGetLogs<br>DSInitialImport<br>DSRunJob                                              | <process name>_out.log<br><process name>_detailed.log<br><process name>.log                                           | Failed.<br>Warning status.                                                                                                                                                                                                                              | NA             |
| ProcessScheduler                                                                      |                                                                                                                       | The log files generated by Process Scheduler are not parsed for warnings or errors. Therefore, even though Change Assistant may show a status of Complete for a Process Scheduler step type, you should review the generated log files for more details |                |

| Processes                                    | Log File           | Error                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Warning Status |
|----------------------------------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| SQLCommand<br>SQLScript<br>UpdatePeopleTools | <process name>.log | DB2 z/OS and DB2<br>UDB: <ul style="list-style-type: none"><li>SQLSTATE=value<br/>(value cannot be<br/>02000).</li><li>SQLxxxxxN.</li><li>DB2xxxxxE.</li></ul> Oracle: ORA.<br>Microsoft SQL Server: <ul style="list-style-type: none"><li>Msg[Microsoft].</li><li>Cannot open<br/>database, access<br/>denied.</li><li>Specified SQL<br/>Server not found.<br/>Transaction rolled<br/>back.</li><li>ConnectionOpen<br/>(Connect()).</li><li>Login failed.</li></ul> | Warning.       |