

PeopleTools 8.63

Upgrade



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Contents

About This Documentation

Understanding This Documentation	i
Prerequisites	i
Audience	i
Organization	ii
Typographical Conventions	ii
Products	iii
Related Information	iii
Comments and Suggestions	iv

1 Preparing for Your PeopleTools Upgrade

Understanding PeopleTools Upgrade Preparation	1
Preparing Your PeopleTools Upgrade Job	1
Understanding PeopleTools Upgrade Job Preparation	1
Running the PeopleTools Filter Query	1
Running the PeopleTools System Filter Query	1
Verifying the Database User	1
Performing Script Modifications	2
Understanding Script Modifications	2
Editing the GRANT Script	2
Editing the DDL Parameters	2
Editing the Change Assistant Job for Compare	3
Preserving PeopleTools Configuration Data	4
Understanding PeopleTools Configuration Data Preservation	4
Saving Transparent Data Encryption Information	4
Saving Oracle Fine Grained Auditing Information	4

2 Preparing Your Database for Upgrade

Understanding Database Preparation	1
Updating Statistics	1
Understanding Updating Statistics	1
Generating Initial Update Stats Script for Oracle	1

Running Initial Update Statistics for Oracle	1
Running Initial Update Statistics for Microsoft	2
Running Initial Audit Reports	2
Understanding Running Initial Audit Reports	2
Running the Initial DDDAUDIT Report	2
Running the Initial SYSAUDIT Report	2
Running the Initial SWPAUDIT Report	3
Creating the INITALTAUD Project	3
Running the Initial Alter Audit	4
Reviewing the Initial Audits	4
Reviewing Table Row Counts	5
Preparing Your Database	5
Understanding Database Preparation	5
Verifying Database Integrity	6
Purging Message Queues	6
Saving a Copy of RecField Definitions	6
Saving a Copy of PeopleTools Database Settings	7
Deleting Object Permission Data	7
Deleting Operator Language Data	7
Cleaning Up Portal History Data	8
Cleaning Up Real Time Indexing Data	8

3 Applying PeopleTools Changes

Understanding PeopleTools Changes	1
Creating Updated Release Scripts	1
Understanding Updated Release Script Creation	1
Running a DBTSFIX Report	1
Editing DBTSFIX Output Scripts	2
Performing Updates to PeopleTools System Tables	2
Understanding Updating PeopleTools System Tables	2
Updating System Catalog Views	2
Updating PeopleTools System Tables	2
Granting Privileges to the CONNECT ID	3
Updating the PeopleTools Database Stamp	3
Encrypting Passwords	4
Updating PeopleTools Patch Information	4
Regenerating Update Statistics Script for Oracle	4
Rerunning Update Statistics for Oracle	4
Updating the Environment Configuration	5
Turning Off Change Control	5
Loading Model Definition Data	5

Understanding Loading Model Definition Data	5
Loading Model Definitions for Oracle	6
Loading Model Definitions for Microsoft	6
Loading Message Data	6
Reviewing Select PeopleTools Objects	6
Copying Select Objects from PeopleTools Projects	7
Understanding Copying Select Objects from PeopleTools Projects	7
Copying Select Objects from the PPLTLS859 Project	7
Copying Select Objects from the PPLTLS860 Project	8
Copying Select Objects from the PPLTLS861 Project	9
Copying Select Objects from the PPLTLS862 Project	9
Copying Select Objects from the PPLTLS863 Project	10
Copying Select Objects from the PPLTLS84CUR Project	11
Copying Select Objects from the PATCH Project	11
Copying Select Objects from the PPLTLS84CURDEL Project	12
Populating Tablespace Data	12
Populating Updated Tablespace Data	12
Building the Updated PeopleTools Project	13
Creating the Merge Project	13
Merging the PeopleTools 8.59 Project	13
Merging the PeopleTools 8.60 Project	13
Merging the PeopleTools 8.61 Project	14
Merging the PeopleTools 8.62 Project	14
Merging the PeopleTools 8.63 Project	14
Merging the PeopleTools Patch Project	15
Merging the PeopleTools Projects	15
Generating the Merged PeopleTools Script	15
Generating the Updated PeopleTools Script	16
Editing the Updated PeopleTools Script	16
Running the Merged PeopleTools Script	16
Running the Updated PeopleTools Script	17
Reviewing Additional PeopleTools Objects	17
Copying Projects	18
Understanding Copying Projects	18
Copying the PPLTLS859 Project	18
Copying the PPLTLS860 Project	18
Copying the PPLTLS861 Project	19
Copying the PPLTLS862 Project	19
Copying the PPLTLS863 Project	20
Copying the PPLTLS84CUR Project	20
Copying the PPLTLS84CURDEL Project	21
Copying the PATCH86X Project	21

Copying the PPLTLS84CUR Project Definition	21
Merging the PeopleTools Projects Again	22
Migrating Records to New Tablespaces	22
Understanding Record Migration to New Tablespaces	22
Copying the PT84TBLSPC Project	22
Building the Tablespace Alter Script	23
Editing the Tablespace Alter Script	23
Running the Tablespace Alter Script	23
Creating PeopleTools Temporary Tables	23
Understanding PeopleTools Temporary Tables Creation	23
Creating the PeopleTools Temporary Tables Project	24
Filtering the PeopleTools Temporary Tables Project	24
Generating the PeopleTools Temporary Tables Script	24
Editing the PeopleTools Temporary Tables Script	24
Running the PeopleTools Temporary Tables Script	25
Loading Base Data	25
Loading PeopleTools Data	25
Loading Additional System Data	25
Loading English Messages	26
Loading Stored Statements Data	26
Resetting the File Processing Functionality	26
Loading Language Data	26
Populating the Language Table	26
Loading the Language Data	27
Populating Arabic Translations	27
Populating Bulgarian Translations	27
Populating Canadian French Translations	28
Populating Croatian Translations	28
Populating Czech Translations	28
Populating Danish Translations	28
Populating Dutch Translations	29
Populating Finnish Translations	29
Populating French Translations	29
Populating German Translations	29
Populating Greek Translations	30
Populating Hebrew Translations	30
Populating Hungarian Translations	30
Populating Italian Translations	30
Populating Japanese Translations	31
Populating Korean Translations	31
Populating Malay Translations	31
Populating Norwegian Translations	31

Populating Polish Translations	32
Populating Portuguese Translations	32
Populating Romanian Translations	32
Populating Russian Translations	32
Populating Serbian Translations	33
Populating Simplified Chinese Translations	33
Populating Slovak Translations	33
Populating Slovenian Translations	33
Populating Spanish Translations	34
Populating Swedish Translations	34
Populating Thai Translations	34
Populating Traditional Chinese Translations	34
Populating Turkish Translations	35
Populating UK English Translations	35
Populating Vietnamese Translations	35
Cleaning Up Orphaned Language Data	35
Loading PeopleTools Definition Group	36
Compiling Directive PeopleCode	36
Converting PeopleTools Objects	36
Loading Conversion Data	36
Reporting Conversion Details	37
Running PeopleTools Data Conversion	37
Creating Views	37
Understanding Creating Views	37
Creating Updated PeopleTools Views	38
Checking for Invalid Views on Microsoft	38
Creating an Invalid Views Project	38
Creating the Invalid Views	38
Creating All Triggers	39
Regenerating Sync IDs	39
Clearing the Rowset Cache	39
Synchronizing Database Objects	40
Understanding Database Object Synchronization	40
Setting Table Attributes	40
Updating Object Version Numbers	40
Dropping PeopleTools Tables After Data Conversion	40
Understanding Dropping PeopleTools Tables After Data Conversion	40
Dropping the Upgrade Copy of RecField Definitions	40
Dropping the Upgrade Copy of PeopleTools Settings	41
Backing Up After the PeopleTools Upgrade	41

4 Completing Database Changes

Understanding Database Changes	1
Updating Language Data	1
Understanding Updating Language Data	1
Running the TSRECPOP Script	1
Setting Up Security	1
Understanding Security	1
Synchronizing CREF Permissions	1
Running the Final Audit Reports	2
Running the Final DDDAUDIT Report	2
Running the Final SYSAUDIT Report	2
Running the Final SWPAUDIT Report	2
Creating the FNLALTAUD Project	3
Running the Final Alter Audit	3
Reviewing the Final Audits	3
Booting Servers	4
Reviewing PeopleTools Functionality	5
Enabling Oracle Transparent Data Encryption	7
Enabling Oracle Fine Grained Auditing	8
Reviewing Change Control	9
Updating Application Objects	9

About This Documentation

Understanding This Documentation

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

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

Prerequisites

Before you begin the technical part of your upgrade, ensure that you have downloaded, read, and completed the tasks detailed in the document "Getting Started on Your PeopleTools Upgrade." available in the Install and Upgrade section on the PeopleSoft PeopleTools page of the Oracle Help Center. You must complete the tasks set forth in that guide before beginning the actual upgrade.

See PeopleTools on the Oracle Help Center, <https://docs.oracle.com/en/applications/peoplesoft/peopletools/index.html>

Audience

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

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

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

Oracle recommends that you complete training before performing an upgrade.

The PeopleSoft Training Center includes various choices for training, including instructor-led training offered by Oracle partners.

See PeopleSoft Information Portal, https://docs.oracle.com/cd/E52319_01/infoportal/training.html

Organization

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

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

Typographical Conventions

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

Convention	Description
Monospace	Indicates a PeopleCode program or other code, such as scripts that you run during the upgrade. Monospace also indicates messages that you may receive during the upgrade process.
<i>Italics</i>	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter <i>O</i> .
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface. Scripts are represented in lower case and may not exactly match the case of the generated scripts.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with <i>See</i> refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading <i>See Also</i> refer you to additional documentation that has more information regarding the subject.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.

Convention	Description
⇒ (line-continuation arrow)	A line-continuation arrow inserted at the end of a line of code indicates that the line of code has been wrapped at the page margin. The code should be viewed or entered as a continuous line of code, without the line-continuation arrow.
Note: Note text.	Text that begins with <i>Note</i> indicates information that you should pay particular attention to as you work with your PeopleSoft system.
Important: Important note text.	A note that begins with <i>Important!</i> is crucial and includes information about what you need to do for the system to function properly.
Warning text.	A note that begins with <i>Warning!</i> contains crucial configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these products and product families:

- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Campus Solutions
- Oracle's PeopleSoft Customer Relationship Management
- Oracle's PeopleSoft Financial Management
- Oracle's PeopleSoft Human Capital Management
- Oracle's PeopleSoft Enterprise Learning Management
- Oracle's PeopleSoft PeopleTools
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Interaction Hub
- Oracle's PeopleSoft Supply Chain Management

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

Related Information

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

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

Go to My Oracle Support and search for the New Feature Overview for your release level.

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

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

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

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

1

Preparing for Your PeopleTools Upgrade

Understanding PeopleTools Upgrade Preparation

In this chapter, you will modify upgrade scripts and the upgrade template to create a nearly automated upgrade.

Preparing Your PeopleTools Upgrade Job

Understanding PeopleTools Upgrade Job Preparation

This task runs steps to update your PeopleTools upgrade job.

Running the PeopleTools Filter Query

This step runs a filter query to filter steps out of your upgrade job that are not required for your specific environment. For example, steps will be filtered based on whether or not a table exists on your Target database.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the PeopleTools System Filter Query

This step runs a filter query to filter steps out of your upgrade job that are not required for your specific environment. For example, steps will be filtered based on whether or not your database is ANSI.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Verifying the Database User

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

Ensure that your upgrade user has PeopleSoft administrator privileges. This allows access to the PeopleSoft portal to make necessary security changes for the upgrade and to run the

Portal Application Engine upgrade program. You use this ID to update the security setting for your other users so they can sign in after the upgrade.

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

To grant your upgrade user PeopleSoft administrator privileges:

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

See the online product documentation for PeopleTools: Security Administration for your new release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Performing Script Modifications

Understanding Script Modifications

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

Editing the GRANT Script

Edit `PS_HOME\SCRIPTS\grant.sql` and make the necessary modifications as documented in the script.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	MS SQL Server	All

Editing the DDL Parameters

Edit the `PS_HOME\SCRIPTS\ddlxxx.dms` script for your database platform, as specified in the table below:

Script	Platform
ddlora.dms	Oracle

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Editing the Change Assistant Job for Compare

Later in the upgrade, the steps to compare the objects in the PeopleTools projects are set to automatically run. The compare results will be useful for analyzing customizations on PeopleTools objects, however this compare is optional and may not need to be run every time you perform the PeopleTools-only upgrade. Regardless of whether the compare is run, the upgrade will still overwrite any customized objects with the new PeopleSoft PeopleTools definitions when you copy the project.

If you do not want to run the compare during the upgrade, mark the following steps as complete in your upgrade job in PeopleSoft Change Assistant.

To set the step as complete:

1. In PeopleSoft Change Assistant, select the step in "Applying PeopleTools Changes," Reviewing Select PeopleTools Objects.
2. Select Edit, Complete, or press F7.
3. Repeat step 2 for the step "Applying PeopleTools Changes," Reviewing Additional PeopleTools Objects.

Note

Do not change any of the compare options within the step properties for the step "Reviewing Select PeopleTools Objects". Not all compare features may be available at that point in time. You may update the report filter check box grid or deselect compare languages, but do not change any other compare options.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
All	Target	All	All	All

Preserving PeopleTools Configuration Data

Understanding PeopleTools Configuration Data Preservation

In this task you run scripts to preserve your PeopleTools configuration data. You will disable certain functionality and save configuration data for use at the end of the upgrade.

Saving Transparent Data Encryption Information

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or higher.

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

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

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

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Saving Oracle Fine Grained Auditing Information

If you have implemented Oracle's Fine Grained Auditing (FGA) feature on PeopleSoft tables, disable it for the duration of the upgrade to improve upgrade performance.

To disable Fine Grained Auditing:

1. Run `PS_HOME\SCRIPTS\preupgfgareport.sql`. This script reports on the current (pre-upgrade) FGA policies stored in `USER_AUDIT_POLICIES`, detailing all columns by table for all tables with FGA policies. Keep this report to use at the end of the final pass of the upgrade.
2. Run `PS_HOME\SCRIPTS\preupgfgaprocess.sql`. This script generates the scripts `pscreatefga.sql` and `psdisablefga.sql`.
3. Run the generated `psdisablefga.sql` to disable FGA policies.

You will run the generated pscreatefga.sql script at the end of the final pass of the upgrade. Do not run it at this time.

See the online product documentation for PeopleTools: Data Management for your new release for more information about administering PeopleSoft databases on Oracle.

See “Completing Database Changes,” Enabling Oracle Fine Grained Auditing.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

2

Preparing Your Database for Upgrade

Understanding Database Preparation

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

Updating Statistics

Understanding Updating Statistics

This task updates statistics on your Target database to improve the performance of your compare and copy processes. Later in the upgrade, your statistics will be updated again due to changes in the database structure.

See *Getting Started on Your PeopleTools Upgrade*, "Appendix: Improving Performance."

Generating Initial Update Stats Script for Oracle

This step runs the ptgentabstats.sql script to create the ptupdtabstats.sql script. The ptupdtabstats.sql script will be run in the next step to update statistics on your Oracle database for populated PeopleSoft tables.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Running Initial Update Statistics for Oracle

This step runs the ptupdtabstats.sql script, which was generated in the previous step. This script updates statistics on your Oracle database for populated PeopleSoft tables in order to improve the performance of the compare and copy processes.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Running Initial Update Statistics for Microsoft

This step runs the updstats.sql script to update statistics on your Microsoft SQL Server database to improve the performance of the compare and copy processes.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Microsoft SQL Server	All

Running Initial Audit Reports

Understanding Running Initial Audit Reports

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

Running the Initial DDDAUDIT Report

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

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

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

See [Reviewing the Initial Audits](#).

See the online product documentation [PeopleTools: System and Server Administration](#) for your current release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Initial SYSAUDIT Report

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

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

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

See Reviewing the Initial Audits.

See the online product documentation PeopleTools: System and Server Administration for your current release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Initial SWPAUDIT Report

SWPAUDIT is an SQR script used to identify potentially “orphaned” PeopleSoft objects in a multilingual database. For example, SWPAUDIT can identify a base and related-language record with mismatched key fields. This type of issue may cause inconsistent behavior between base and non-base language usage, or between pre-swapped and post-swapped databases.

SWPAUDIT should be run against your database before you run the PeopleSoft Data Mover command SWAP_BASE_LANGUAGE. It can optionally be run again after a swap, or any time, to check database integrity in a multilingual context. If you are upgrading a database that has already been swapped, it is not mandatory to run SWPAUDIT again before proceeding with the upgrade.

In this step, SWPAUDIT is run using SQR from your current (old) PeopleSoft release against the Copy of Production.

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

See Reviewing the Initial Audits.

See the online product documentation PeopleTools: Global Technology for your current release, “Using Related Language Tables,” Swapping the Base Language.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All Non-English

Creating the INITALTAUD Project

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Initial Alter Audit

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reviewing the Initial Audits

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

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

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

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

Note

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

Note

For Microsoft SQL Server customers, you may see SQL to alter the tables and re-create their associated indexes, even though the underlying tables and indexes may not have changed if your database has tables containing the MSSCONCATCOL column. Alternatively, depending on your current PeopleTools release, PeopleTools may have deprecated the usage of the MSSCONCATCOL column and the corresponding PSW search index since MSS 2016 now supports indexes with more than 16 columns. If you encounter index creation errors for the index replacing the old W index, please review the data and cleanup as needed.

Note

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

See the online product documentation PeopleTools: System and Server Administration for your current release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reviewing Table Row Counts

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Preparing Your Database

Understanding Database Preparation

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

Verifying Database Integrity

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

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

Platform		Command		
Microsoft SQL Server		DBCC CHECKDB		
Oracle		dbv		

Properties				
Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	MS SQL Server Oracle	All

Purging Message Queues

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

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

appmsgpurgeall.dms

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Saving a Copy of RecField Definitions

This step runs ptreffield.dms from your new release codeline. This script creates a copy of the contents of PSRECFIELD before the upgrade is begun. It is used by the PeopleTools data

conversion code to determine the structure of tables that may have been impacted by fixes you applied.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Saving a Copy of PeopleTools Database Settings

This step runs `ptpsstatus.dms` from your new release codeline. This script creates a copy of the contents of `PSSTATUS` before the upgrade is begun. It is used by the PeopleTools data conversion code to determine your original PeopleTools release and/or PeopleTools patch level.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Deleting Object Permission Data

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.55 or earlier.

In this step, the PeopleTools table `PS_APPDES_OBJ_PERM` is truncated to ensure the successful completion of your upgrade. Because the primary key index on this table changed in PeopleTools 8.56, the data stored in this table needs to be deleted to ensure that the index can be successfully created later in the upgrade. The data stored in this table will be reloaded later in the upgrade.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Deleting Operator Language Data

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.54 or 8.55.

In this step, the PeopleTools table `PSOPRDEFN_LANG` is truncated to ensure the successful completion of your upgrade. Because the primary key index on this table changed in PeopleTools 8.56, the data stored in this table needs to be deleted to ensure that the index can be successfully created later in the upgrade.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Cleaning Up Portal History Data

PeopleSoft Change Assistant will display and run this step if you are upgrading from PeopleSoft PeopleTools 8.58 or earlier.

In this step, some of the portal history data stored in the PeopleTools table PS_PT_PORTAL_MRU is deleted to ensure the successful completion of your upgrade. The primary key index on this table changed in PeopleTools 8.59, and the data stored in this table needs to be cleaned up to ensure that the index can be successfully created later in the upgrade.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Cleaning Up Real Time Indexing Data

PeopleSoft Change Assistant will display and run this step if you are upgrading from PeopleSoft PeopleTools 8.59.

In this step, the real time indexing data stored in the PeopleTools table PS_PTSTF_RTISTG is deleted to ensure the successful completion of your upgrade. The primary key index on this table changed in PeopleTools 8.59, and the data stored in this table needs to be cleaned up to ensure that the index can be successfully created later in the upgrade.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

3

Applying PeopleTools Changes

Understanding PeopleTools Changes

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

Important

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

Note

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

Creating Updated Release Scripts

Understanding Updated Release Script Creation

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

Running a DBTSFIX Report

The dbtsfix.sqr script aligns the tablespaces in the delivered release scripts with the Target database used during the upgrade. This process generates new release scripts, conforming to the RELxxxdbtsfix.sql naming convention that you run in a later task. Run this script to preserve your existing table-to-tablespace mapping in the Target database. The result of this task will be a RELxxxdbtsfix.sql script in which xxx represents a release number (for example, 852, 853, 854, and so on) associated with your particular path.

! Important

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Editing DBTSFIX Output Scripts

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

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Performing Updates to PeopleTools System Tables

Understanding Updating PeopleTools System Tables

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

Updating System Catalog Views

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	MS SQL Server	All

Updating PeopleTools System Tables

Release scripts are SQL scripts that modify the underlying table structure of a database so that it is compatible with a more recent PeopleSoft PeopleTools release. They are located in the

`PS_HOME\SCRIPTS` directory. Release scripts can be identified by their common naming standard, `relxxx.sql` in which `xxx` designates a PeopleSoft PeopleTools release number.

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

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

Note

This step runs at least one script. Do not proceed to the next step until these scripts run successfully.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Granting Privileges to the CONNECT ID

This step runs the `grant.sql` script. This script grants select access to the CONNECT ID for tables necessary for sign-in.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Updating the PeopleTools Database Stamp

This step runs `ptdbstamp.dms`, which updates your database with the version of PeopleSoft PeopleTools being applied.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Encrypting Passwords

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.54 or earlier.

This step runs `encrypt.dms`. This script encrypts passwords with the latest hashing scheme used in the current PeopleSoft PeopleTools release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Updating PeopleTools Patch Information

This step runs `ptpatch.dms`, which updates your database with the version of the PeopleSoft PeopleTools patch being applied.

Note

You only need to run this step if you are applying a PeopleSoft PeopleTools patch as part of the upgrade process. This step will be skipped if the patch script does not exist.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Regenerating Update Statistics Script for Oracle

This step runs the `ptgentabstats.sql` script in order to create the `ptupdtabstats.sql` script. `ptupdtabstats.sql` will be run in the next step to update statistics on your Oracle database for populated PeopleSoft tables.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Rerunning Update Statistics for Oracle

Earlier in the upgrade process, you updated your statistics for Oracle. Due to changes in the database structure, you must update statistics again to improve the performance of your compare and copy. This step runs the `ptupdtabstats.sql` script, which was generated in the

previous step. This script updates statistics on your Oracle database for populated PeopleSoft tables.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Updating the Environment Configuration

This task updates your Change Assistant database definition for your upgrade database setting the value of the current PS_HOME in the Change Assistant database definition to the new PS_HOME value of that same definition.

Note

If you need to restart your Change Assistant job from an earlier point in the upgrade, you will also need to update your database definition back to the original values for your upgrade database *and* rerun this task.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Turning Off Change Control

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

See “Completing Database Changes,” Reviewing Change Control.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading Model Definition Data

Understanding Loading Model Definition Data

In this task, you load model definition scripts for your database platform and populate DDL model definitions. This step runs the DDL model definition script applicable to your database

platform. If required by your database platform, you modified this script in the task Performing Script Modifications, to use your site-specific information.

See Performing Script Modifications.

Loading Model Definitions for Oracle

This step runs the ddlora.dms script to populate DDL model definitions for the Oracle platform.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Loading Model Definitions for Microsoft

This step runs the ddlmss.dms script to populate DDL model definitions for the Microsoft SQL Server.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	MS SQL Server	All

Loading Message Data

This step runs the msgtlsupg.dms script, which loads system messages in the message catalog.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reviewing Select PeopleTools Objects

Earlier in the upgrade you had the opportunity to mark this task as complete if you did not wish to run this optional compare. In this task, Change Assistant runs a compare to identify any PeopleSoft PeopleTools records, fields, or indexes that you may have customized. This task only identifies the customized PeopleSoft PeopleTools objects. You still must overwrite the customized objects with the new PeopleSoft PeopleTools definitions when you copy the project. The other object types may be compared later in the upgrade.

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

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

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

Note

If you are applying this PeopleSoft PeopleTools upgrade to your Demo database, you do not need to run this task. You should only consider running this task when you are applying this upgrade to other environments.

You will review the compare reports at the end of the upgrade. No development or modification of customized objects can occur at this point in time as PeopleTools is not yet fully functional.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from PeopleTools Projects

Understanding Copying Select Objects from PeopleTools Projects

In this task, you copy selected objects from projects. The copy process overwrites all customizations, which can include configuration settings stored on the PeopleSoft PeopleTools objects. Oracle recommends that you verify the results of all copied projects. After a project has been copied, each object is identified with a check mark in the Done column. You can view these results from the Upgrade tab in PeopleSoft Application Designer. It is also recommended that you copy the PeopleSoft PeopleTools projects with the *Take Action* flags set as they originally were set when the database was delivered.

You will copy the remaining objects from the projects in a later task.

See the product documentation for PeopleTools: PeopleSoft Application Designer Developer's Guide for your new release.

Copying Select Objects from the PPLTLS859 Project

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.58.

This process copies records, fields, and indexes to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PPLTLS859 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.59 release.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. The PPLTLS859 project is delivered with an action of CopyProp to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors that you may receive at this time similar to the following examples:

Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: *OBJECTNAME* not copied, entire definition already copied.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PPLTLS860 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.60 release represented within the project name.

This process copies records, fields, and indexes to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PPLTLS860 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.60 release.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. The PPLTLS860 project is delivered with an action of CopyProp to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors that you may receive at this time similar to the following examples:

Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: *OBJECTNAME* not copied, entire definition already copied.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PPLTLS861 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.61 release represented within the project name.

This process copies records, fields, indexes, and sequences to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PPLTLS861 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.61 release.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. The PPLTLS861 project is delivered with an action of CopyProp to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors that you may receive at this time similar to the following examples:

Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: *OBJECTNAME* not copied, entire definition already copied.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PPLTLS862 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.62 release represented within the project name.

This process copies records, fields, indexes, and sequences to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PPLTLS862 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.62 release.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. The PPLTLS862 project is delivered with an action of CopyProp to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given

field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors that you may receive at this time similar to the following examples:

Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: *OBJECTNAME* not copied, entire definition already copied.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PPLTLS863 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.63 release represented within the project name.

This process copies records, fields, indexes, and sequences to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PPLTLS863 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.63 release.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. The PPLTLS863 project is delivered with an action of CopyProp to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied.

You can ignore any errors that you may receive at this time similar to the following examples:

Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: *OBJECTNAME* not copied, entire definition already copied.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PPLTLS84CUR Project

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.57 or earlier.

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

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

Changed Action from CopyProp to Copy, definition does not exist on target.

Definition Name: *OBJECTNAME* not copied, entire definition already copied.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PATCH Project

This process copies records, fields, indexes, and sequences to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PATCH86X project contains all PeopleSoft PeopleTools objects that have been updated in the patch.

Note

Perform this process only if you are applying a PeopleSoft PeopleTools patch that includes a database project. Check the patch documentation to verify whether a database project was delivered with the patch. This step will be skipped if the patch project does not exist.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Select Objects from the PPLTLS84CURDEL Project

This process deletes obsolete PeopleSoft PeopleTools records, fields, and indexes from your database.

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

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

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Populating Tablespace Data

Populating Updated Tablespace Data

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

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Building the Updated PeopleTools Project

Creating the Merge Project

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.58 or later.

In this step, the empty PTMERGE project is created for use in merging all the new and modified PeopleTools records together into a single project. If it already exists, the PTMERGE project will be re-created as an empty project.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools 8.59 Project

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.58.

In this step, the PPLTLS859 project definition is merged with the PTMERGE project definition so that the PTMERGE project definition contains all records created or updated during the PeopleTools 8.59 release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools 8.60 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.60 release represented within the project name.

In this step, the PPLTLS860 project definition is merged with the PTMERGE project definition so that the PTMERGE project definition contains all records created or updated during the PeopleTools 8.60 release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools 8.61 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.61 release represented within the project name.

In this step, the PPLTLS861 project definition is merged with the PTMERGE project definition so that the PTMERGE project definition contains all records created or updated during the PeopleTools 8.61 release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools 8.62 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.62 release represented within the project name.

In this step, the PPLTLS862 project definition is merged with the PTMERGE project definition so that the PTMERGE project definition contains all records created or updated during the PeopleTools 8.62 release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools 8.63 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.63 release represented within the project name.

In this step, the PPLTLS863 project definition is merged with the PTMERGE project definition so that the PTMERGE project definition contains all records created or updated during the PeopleTools 8.63 release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools Patch Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58.

In this step, the PTMERGE project definition is merged with the PATCH86X project definition for the new release so that the PTMERGE project definition is updated with any new records delivered in the PeopleTools Patch.

Note

This step will be skipped if the patch project does not exist.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools Projects

In this step, the PPLTLS84CUR project definition is merged with the PATCH86X project definition for the new release so that the PPLTLS84CUR project definition is updated with any new records delivered in the PeopleTools Patch.

Note

This step will be skipped if the patch project does not exist.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Generating the Merged PeopleTools Script

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58.

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

PTMERGETables.sql

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Generating the Updated PeopleTools Script

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

ppltls84curtables.sql

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Editing the Updated PeopleTools Script

In this step, you edit either the ppltls84curtables.sql script or the PTMERGETables.sql script that was generated in the previous step for tablespace names and sizing. If you are upgrading from PeopleTools 8.57 or earlier, edit ppltls84curtables.sql. If you are upgrading from PeopleTools 8.58 or later edit PTMERGETables.sql.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Running the Merged PeopleTools Script

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58.

This step runs the script you generated in this task to create and alter all records of the type Table. This creates new table structures, alters existing PeopleSoft table structures, creates new indexes, re-creates modified indexes, creates triggers, and creates sequences.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Updated PeopleTools Script

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.57 or earlier.

This step runs the script you generated in this task to create and alter all records of the type Table. This creates new table structures, alters existing PeopleSoft table structures, creates new indexes, re-creates modified indexes, creates triggers, and creates sequences.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reviewing Additional PeopleTools Objects

Earlier in the upgrade you had the opportunity to mark this task as complete if you did not wish to run this optional compare. You might have already performed an optional compare on PeopleSoft PeopleTools records, fields, and indexes. In this task you may *optionally* compare the remaining PeopleTools object types.

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

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

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

Note

If you are applying this PeopleSoft PeopleTools upgrade to your Demo database, you do not need to run this task. You should only consider running this task when you are applying this upgrade to other environments.

You will review the compare reports at the end of the upgrade. No development or modification of customized objects can occur at this point in time as PeopleTools is not yet fully functional.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying Projects

Understanding Copying Projects

Earlier in the upgrade you copied records, fields, and indexes. In this task, you copy the remaining object types from the PeopleTools projects. The copy process overwrites all customizations, which can include configuration settings stored on the PeopleSoft PeopleTools objects.

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

See the product documentation for PeopleTools: PeopleSoft Application Designer Developer's Guide for your new release.

Copying the PPLTLS859 Project

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.58.

This process copies the remaining objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. Records, fields, and indexes were copied earlier in the upgrade in a separate step. The PPLTLS859 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.59 release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS860 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.60 release represented within the project name.

This process copies the remaining objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. Records, fields, and indexes were copied earlier in the upgrade in a separate step. The PPLTLS860 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.60 release. You may see the following kind of warning during the copy:

Record PeopleCode Definition Name: RecordPeoplecodeName not copied, parent definition does not exist in target database

This warning can be ignored because the parent record was modified or deleted in the prior task "Copying Select Objects from PeopleTools Projects." The objects referenced in the warning are listed in the composite delete project PPLTLS84CURDEL, which will be copied later in this task.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS861 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.61 release represented within the project name.

This process copies the remaining objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. Records, fields, and indexes were copied earlier in the upgrade in a separate step. The PPLTLS861 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.61 release. You may see the following kind of warning during the copy:

Record PeopleCode Definition Name: RecordPeoplecodeName not copied, parent definition does not exist in target database

This warning can be ignored because the parent record was modified or deleted in the prior task "Copying Select Objects from PeopleTools Projects." The objects referenced in the warning are listed in the composite delete project PPLTLS84CURDEL, which will be copied later in this task.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS862 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.62 release represented within the project name.

This process copies the remaining objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. Records, fields, and indexes were copied earlier in the upgrade in a separate step. The PPLTLS862 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.62 release. You may see the following kind of warning during the copy:

Record PeopleCode Definition Name: RecordPeoplecodeName not copied, parent definition does not exist in target database

This warning can be ignored because the parent record was modified or deleted in the prior task "Copying Select Objects from PeopleTools Projects." The objects referenced in the warning are listed in the composite delete project PPLTLS84CURDEL, which will be copied later in this task.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS863 Project

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58 and less than the PeopleTools 8.63 release represented within the project name.

This process copies the remaining objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. Records, fields, and indexes were copied earlier in the upgrade in a separate step.

The PPLTLS863 project contains all PeopleSoft PeopleTools objects that have been created or updated in the PeopleSoft PeopleTools 8.63 release. You may see the following kind of warning during the copy:

```
Record PeopleCode Definition Name: RecordPeoplecodeName not copied, parent
definition does not exist in target database
```

This warning can be ignored because the parent record was modified or deleted in the prior task "Copying Select Objects from PeopleTools Projects." The objects referenced in the warning are listed in the composite delete project PPLTLS84CURDEL, which will be copied later in this task.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS84CUR Project

PeopleSoft Change Assistant will display this step if you are upgrading from PeopleSoft PeopleTools 8.57 or earlier.

This process copies the remaining objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. Records, fields, and indexes were copied earlier in the upgrade in a separate step. The PPLTLS84CUR project contains all PeopleSoft PeopleTools objects that have been created or updated since PeopleSoft PeopleTools 8.40 was released.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS84CURDEL Project

This process deletes the remaining specified PeopleSoft PeopleTools objects from your database. Records, fields, and indexes were deleted earlier in the upgrade in a separate step.

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

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

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PATCH86X Project

This process copies the remaining patch objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PATCH86X project contains all PeopleSoft PeopleTools objects that have been updated in the patch.

Note

Perform this process only if you are applying a PeopleSoft PeopleTools patch that includes a database project. Check the patch documentation to verify whether a database project was delivered with the patch. This step will be skipped if the patch project does not exist.

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Copying the PPLTLS84CUR Project Definition

PeopleSoft Change Assistant will display this step if your current PeopleTools release is greater than or equal to PeopleTools 8.58.

This process copies the updated PPLTLS84CUR project definition to reflect the latest changes for the new release. Only the project definition is copied; the individual objects do not need to be copied.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Merging the PeopleTools Projects Again

In this step, the PPLTLS84CUR project definition is merged with the PATCH86X project definition for the new release so that the PPLTLS84CUR project definition is updated with any new records delivered in the PeopleTools Patch. This updated project will be used later in the upgrade when creating PeopleTools views.

Note

This step will be skipped if the patch project does not exist.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Migrating Records to New Tablespaces

Understanding Record Migration to New Tablespaces

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

Copying the PT84TBLSPC Project

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Building the Tablespace Alter Script

This step generates the SQL script to alter records of the type Table that are delivered in the PT84TBLSPC project. The tables are altered to move them to the correct tablespaces for the new release of PeopleSoft PeopleTools. The script name is:

tablespacealtertables.sql

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Editing the Tablespace Alter Script

In this step, you edit the tablespacealtertables.sql script for tablespace names and sizing. If you are running on an RDBMS platform that uses tablespaces, and you are *not* using the PeopleSoft tablespace names, you need to review and modify the scripts above. Have your database administrator review these scripts and modify the tablespace names appropriately. The script can be found in your PeopleSoft Change Assistant output directory for this upgrade path.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Running the Tablespace Alter Script

This step runs the tablespacealtertables.sql script to move the tables to the new tablespaces.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Creating PeopleTools Temporary Tables

Understanding PeopleTools Temporary Tables Creation

In this task, you perform steps to create PeopleTools temporary tables.

Creating the PeopleTools Temporary Tables Project

This step creates a project named PTTEMPTABS, which contains all records of the type Temporary Table.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Filtering the PeopleTools Temporary Tables Project

This step removes all non-PeopleTools temporary tables from the PTTEMPTABS project. After running this step, only PeopleTools-delivered temporary tables remain in the project.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Generating the PeopleTools Temporary Tables Script

This step generates the pttemptabs.sql script to drop and re-create all PeopleTools-owned temporary tables in the PTTEMPTABS project. Processes use the temporary tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Editing the PeopleTools Temporary Tables Script

In this step, you edit the pttemptabs.sql script that was generated in the previous step for tablespace names and sizing. If you are running on a RDBMS platform that uses tablespaces, and you are not using the PeopleSoft tablespace names, have your database administrator review this script and modify the tablespace names appropriately. The script can be found in your PeopleSoft Change Assistant output directory for this upgrade path.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Running the PeopleTools Temporary Tables Script

This step runs the pttemptabs.sql script, which drops and re-creates the PeopleTools-owned records of the type Temporary Table in the PTTEMPTABS project.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading Base Data

These PeopleSoft Data Mover scripts (DMSs) initialize and modify the data in various PeopleSoft PeopleTools tables required for the system to run properly. This step runs scripts conforming to the ptxxxtls.dms naming convention, where xxx represents a PeopleSoft PeopleTools release number that is greater than your current PeopleSoft PeopleTools release. For some upgrades, no data scripts are required. In this case, PeopleSoft Change Assistant continues to the next step without producing a log file.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading PeopleTools Data

Loading Additional System Data

This step runs ptsysi.dms, which imports additional PeopleTools system data that was not previously loaded in the step Loading Base Data.

Note

Some of the data will be imported using the ignore dups option. These data loads will give the message “Error: duplicate SQL rows” and then give a “Successful completion” message. These error messages can be ignored because duplicate data is expected.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading English Messages

This step runs the msgtleng.dms script, which loads English messages into your database.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading Stored Statements Data

Loading the stored statements ensures that the dynamic SQL statements will work correctly with the delivered COBOL programs.

This step runs the storept.dms script, which loads the dynamic SQL used by the PeopleSoft PeopleTools-delivered COBOL.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Resetting the File Processing Functionality

This step runs the ptfx_libon.dms script, which resets the File Processing mode to the default value.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading Language Data

Populating the Language Table

This step runs the pslanguages.dms script. This script populates the PSLANGUAGES table with character set information and other language-specific data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Loading the Language Data

If your database has languages installed in addition to English, you must populate the PSLANGUAGES table.

To load language data:

1. From the DMS that was created for your PeopleSoft 8.x database installation, find the UPDATE to PSLANGUAGES.

The statement should look similar to the following:

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

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

Your database is now updated with the language data.

Note

If you have any custom languages defined, you will need to re-enter your custom language information back into PSLANGUAGES before completing the upgrade.

See the product documentation for PeopleTools: Global Technology for your current release, “Adding New Languages,” Adding New Language Codes to the System.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All Non-English

Populating Arabic Translations

This step runs the ptara.dms script. This script loads all of the Arabic translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Arabic

Populating Bulgarian Translations

This step runs the ptbul.dms script. This script loads all of the Bulgarian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Bulgarian

Populating Canadian French Translations

This step runs the ptcfr.dms script. This script loads all of the Canadian French translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Canadian French

Populating Croatian Translations

This step runs the ptcro.dms script. This script loads all of the Croatian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Croatian

Populating Czech Translations

This step runs the ptcze.dms script. This script loads all of the Czech translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Czech

Populating Danish Translations

This step runs the ptdan.dms script. This script loads all of the Danish translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Danish

Populating Dutch Translations

This step runs the ptdut.dms script. This script loads all of the Dutch translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Dutch

Populating Finnish Translations

This step runs the ptfm.dms script. This script loads all of the Finnish translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Finnish

Populating French Translations

This step runs the ptfra.dms script. This script loads all of the French translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	French

Populating German Translations

This step runs the ptger.dms script. This script loads all of the German translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	German

Populating Greek Translations

This step runs the ptgrk.dms script. This script loads all of the Greek translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Greek

Populating Hebrew Translations

This step runs the ptheb.dms script. This script loads all of the Hebrew translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Hebrew

Populating Hungarian Translations

This step runs the pthun.dms script. This script loads all of the Hungarian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Hungarian

Populating Italian Translations

This step runs the ptita.dms script. This script loads all of the Italian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Italian

Populating Japanese Translations

This step runs the ptjpn.dms script. This script loads all of the Japanese translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Japanese

Populating Korean Translations

This step runs the ptkor.dms script. This script loads all of the Korean translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Korean

Populating Malay Translations

This step runs the ptmay.dms script. This script loads all of the Malay translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Malaysian

Populating Norwegian Translations

This step runs the ptnor.dms script. This script loads all of the Norwegian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Norwegian

Populating Polish Translations

This step runs the ptpol.dms script. This script loads all of the Polish translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Polish

Populating Portuguese Translations

This step runs the ptpor.dms script. This script loads all of the Portuguese translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Portuguese

Populating Romanian Translations

This step runs the ptprom.dms script. This script loads all of the Romanian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Romanian

Populating Russian Translations

This step runs the pptrus.dms script. This script loads all of the Russian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Russian

Populating Serbian Translations

This step runs the ptser.dms script. This script loads all of the Serbian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Serbian

Populating Simplified Chinese Translations

This step runs the ptzhs.dms script. This script loads all of the Simplified Chinese translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Simplified Chinese

Populating Slovak Translations

This step runs the ptslk.dms script. This script loads all of the Slovak translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Slovak

Populating Slovenian Translations

This step runs the ptslv.dms script. This script loads all of the Slovenian translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Slovenian

Populating Spanish Translations

This step runs the ptesp.dms script. This script loads all of the Spanish translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Spanish

Populating Swedish Translations

This step runs the ptsve.dms script. This script loads all of the Swedish translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Swedish

Populating Thai Translations

This step runs the pttha.dms script. This script loads all of the Thai translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Thai

Populating Traditional Chinese Translations

This step runs the ptzht.dms script. This script loads all of the Traditional Chinese translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Traditional Chinese

Populating Turkish Translations

This step runs the pttur.dms script. This script loads all of the Turkish translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Turkish

Populating UK English Translations

This step runs the ptuke.dms script. This script loads all of the UK English translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	UK English

Populating Vietnamese Translations

This step runs the ptvie.dms script. This script loads all of the Vietnamese translations for PeopleTools objects and PeopleTools data.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	Vietnamese

Cleaning Up Orphaned Language Data

This step runs the Application Engine program PTIACLNLANGCA. This Application Engine program removes any orphaned related language objects that do not have a matching base language object.

Note

PTIACLNLANGCA will remove orphaned language objects for both PeopleTools and non-PeopleTools objects.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All non-English

Loading PeopleTools Definition Group

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Compiling Directive PeopleCode

This task compiles all directive PeopleCode.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Converting PeopleTools Objects

Loading Conversion Data

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reporting Conversion Details

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running PeopleTools Data Conversion

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Creating Views

Understanding Creating Views

This task runs steps to re-create the views that were impacted by PeopleTools records delivered in the upgrade.

Note

Starting with PeopleTools 8.63, this task has been streamlined to remove any steps involved in checking or re-creating invalid views on the Oracle database platform. On the Oracle platform, views move to an invalid state when the underlying PeopleTools tables or views are modified or re-created during an upgrade. However, invalid views are automatically recompiled the next time they are accessed. Additionally, this step will create any indexes defined on Materialized views.

Creating Updated PeopleTools Views

This step creates all views defined in the PPLTLS84CUR project. These PeopleTools views are either new or changed across PeopleTools releases and need to be re-created.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Checking for Invalid Views on Microsoft

This step runs dddinwvs.sqr, which identifies existing non-PeopleTools views impacted when the underlying PeopleTools table or view was dropped. These are the views that went into an invalid state when the underlying PeopleTools table or view was changed or re-created during the upgrade.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Microsoft SQL Server	All

Creating an Invalid Views Project

This step creates and populates the PTUVIEW project with the views identified by running dddinwvs.sqr from the previous step.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Microsoft SQL Server	All

Creating the Invalid Views

This step creates all views defined in the PTUVIEW project. It also generates the SQL script ptuview_crtvw.sql, which shows the view SQL that was run for each view. This step will also create any indexes defined on Materialized views.

! Important

Review the log to find any views that failed to be created. All views should be created at this time, so those errors are not acceptable and should be corrected.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Microsoft SQL Server	All

Creating All Triggers

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Regenerating Sync IDs

This task runs the AE_SYNCIDGEN Application Engine program to regenerate synchronization IDs. PeopleSoft PeopleTools uses synchronization IDs to give each row a unique identifier.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Clearing the Rowset Cache

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Synchronizing Database Objects

Understanding Database Object Synchronization

This task runs steps to update and populate table attributes.

Setting Table Attributes

This step runs `setspace.sqr`, which populates all tablespace information in the `PSRECTBLSPC` table. The values stored in the `DDLSPACENAM` field are updated with current values found in the system catalog. If you modified tablespace names from the delivered names, this step makes those same changes in the PeopleSoft record definition.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Updating Object Version Numbers

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Dropping PeopleTools Tables After Data Conversion

Understanding Dropping PeopleTools Tables After Data Conversion

In this task, you drop tables that were created earlier in the upgrade to temporarily hold old release data and that were used during data conversion. These tables are no longer needed and should be dropped to ensure clean audits at the end of the upgrade.

Dropping the Upgrade Copy of RecField Definitions

In this step, the cloned table `PSRECFIELD_UPG` that was created in the beginning of the PeopleTools upgrade is dropped. The old release data is no longer needed.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Dropping the Upgrade Copy of PeopleTools Settings

In this step, the cloned table PSSTATUS_UPG that was created in the beginning of the PeopleTools upgrade is dropped. The old release data is no longer needed.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Backing Up After the PeopleTools Upgrade

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

4

Completing Database Changes

Understanding Database Changes

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

Updating Language Data

Understanding Updating Language Data

In this task, you run scripts to modify data in PeopleSoft PeopleTools-related language tables.

Running the TSRECPOP Script

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Setting Up Security

Understanding Security

In this task you perform steps to set up security, grant access to the user ID, set up permissions lists, and grant access to navigation and home pages.

Synchronizing CREF Permissions

This step runs the Application Engine program PORTAL_CSS, which synchronizes Portal Registry Structures and Permission Lists for all Portal Registry Definitions in the Upgrade database. The Portal Registry Structures, as copied from the new release, do not initially reference any permission lists on the Upgrade database. The synchronization process matches the existing permission lists to the appropriate Registry Structures. Review any messages received during the running of this process with your Portal Administrator.

See the online product documentation for PeopleTools: Portal Technology for your new release.

Note

If the permission lists for your upgrade user do not allow you access to a component, you will encounter this error when running the security synchronization process for that page: Security synchronization failed for Portal Object. This error may indicate other problems with the component or folder, but you should check your security first.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Final Audit Reports

Running the Final DDDAUDIT Report

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Final SYSAUDIT Report

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Final SWPAUDIT Report

SWPAUDIT is an SQR that checks database integrity in a multilingual context. For example, SWPAUDIT can identify a base and related-language record with mismatched key fields.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All non-English

Creating the FNLALTAUD Project

In this step, you create the FNLALTAUD project and use it to run your final Alter Audit. Creating this new project now ensures that all the records in your system are audited, including SQL tables. This project also includes any custom records that you have created in your system.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Running the Final Alter Audit

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

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reviewing the Final Audits

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

fnlaltaud_alttbl.sql

fnlaltaud_crtidx.sql

Note

The Alter Audit process also creates the script `fnlaltaud_crttrg.sql`, which re-creates all database triggers. You do not need to run this script, since all database triggers were created in a previous task.

Note

For Microsoft SQL Server customers, PeopleTools has deprecated the usage of the `MSSCONCATCOL` column and the corresponding PSW search index since MSS 2016 now supports indexes with more than 16 columns. If you encounter index creation errors for the index replacing the old W index, please review the data and cleanup as needed.

Review the output from the SYSAUDIT, SWPAUDIT (if applicable), and DDDAUDIT reports and correct any discrepancies.

Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from PeopleSoft Application Designer are not automatically deleted from the system tables. Oracle takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Similarly, your SYSAUDIT report may have some errors due to references to obsolete PeopleSoft-owned objects. Invalid references are not automatically cleaned up during the upgrade in case you have customizations that you want to modify. For instance, if a PeopleSoft Permission List is deleted, and you have a Role that still refers to that Permission List, then it will appear on the SYSAUDIT report.

See the online product documentation for PeopleTools: Data Management for your new release.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Booting Servers

Deploy PS_HOME and create new domains using the PeopleTools DPK for your new PeopleTools release. Clear your client workstation browser cache and boot your application servers, web servers, and process scheduler servers. At this point in the upgrade, complete any necessary remaining installation tasks.

See the PeopleTools Deployment Packages Installation guide for your new release, Appendix: Performing a PeopleTools-Only Upgrade Using the PeopleSoft PeopleTools DPKs.

Note

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

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Reviewing PeopleTools Functionality

PeopleSoft Online Help provides details about the current PeopleSoft PeopleTools functionality. There are many new features delivered in the new release that you may want to use. You should now review the PeopleSoft Online Help and the PeopleTools Deployment Packages Installation guide for your new release to configure your environment properly. This may include, but is not limited to, configuring and starting a process scheduler and a report server, and reviewing portal settings.

See PeopleTools on the Oracle Help Center, <https://docs.oracle.com/en/applications/peoplesoft/peopletools/index.html>

See the PeopleTools Deployment Packages Installation guide for your new release.

To review the PeopleSoft PeopleTools New Feature Overview, go to My Oracle Support and search for the PeopleSoft PeopleTools New Feature Overview for your new release.

You should review the following considerations:

- If you applied a PeopleSoft PeopleTools patch as part of the upgrade, review the patch's README file, especially anything documented in the Patch Notes or Additional Considerations sections. All of the steps included in the PeopleTools Patch Change Package were covered as part of applying the PeopleTools Upgrade Change Package. The scripts run in the patch deliver data in an incremental fashion versus the composite scripts used in the upgrade, but any database changes delivered in the patch were also included in the upgrade.
- Oracle has updated the themes that define the look of the user interface.

Various user interface options were delivered with your current PeopleSoft release.

The following table lists the theme or style available for each PeopleSoft release:

Theme Name	Release
Classic (deprecated as of PeopleTools 8.50)	PeopleSoft 8.4 applications and pre-8.50 PeopleTools system databases
Light blue (deprecated as of PeopleTools 8.50)	NA
Dark blue	PeopleSoft 8.8, 8.9, and 9.0 applications and 8.51 or later PeopleTools system databases
SWAN	PeopleSoft 9.1 applications
Tangerine, Tangerine_ALT, and Fluid	PeopleSoft 9.2 applications

Your style settings were retained during the upgrade, but your theme may have been updated.

See the product documentation for PeopleTools: Portal Technology for your new release for more information about using PeopleTools branding features.

- Review your PeopleSoft Portal settings, as the values may have changed during the upgrade.

See the product documentation for PeopleTools: Portal Technology for your new release for more information about understanding changes in portal configuration settings.

- As of PeopleTools 8.54, partitioning is supported on Oracle platforms. The upgrade process preserved partitioning on existing tables and indexes. Table partitioning information is stored in PTTBLPARTDDL and index partitioning information is stored in PTIDXPARTDDL. You can query these records to find the Oracle-delivered partitioning recommendations, if any. Review the delivered application partitioning recommendations, make any necessary changes for your specific environment, and then apply the changes to your environment.

See the product documentation for PeopleTools: Data Management, Maintaining Partition Definitions for more information about partitioning on Oracle platforms.

- As of PeopleTools 8.55, if you are an Oracle database customer, the set of privileges given to the access ID has been refined even further. If you are upgrading from PeopleSoft PeopleTools 8.54 or earlier, restrict the access ID privileges after completing the final pass of the upgrade.

See the PeopleSoft 9.2 Application Installation guide for your new release, appendix "Synchronizing the ACCESSID User."

- As of PeopleTools 8.55, SAP Crystal Reports and Business Objects Enterprise (BOE) are no longer supported. Crystal Reports and BOE will not work on any environments that are running on PeopleSoft PeopleTools 8.55. Review Tech Update: Oracle Retires Support for Crystal Reports (Article ID KB418566) for more information.
- As of PeopleTools 8.55, the Namespace Alias feature is enhanced and can be used for mapping environment information when cloning or changing middle tier components. If you used this functionality with Elasticsearch or SES, you can continue to use Namespace Alias with OpenSearch in all OpenSearch supported releases. You will need to delete any old Namespace Alias settings for SES and then build initial indexes for OpenSearch. Already indexed data with Elasticsearch 7.10 can be directly used with OpenSearch. If you did not use Namespace Alias in an earlier PeopleTools version, then no action is required for upgrade.

See the product documentation for PeopleTools: Search Technology, Administering Search Framework for more information about setting Namespace Aliases.

- As of PeopleTools 8.61, OpenSearch is the only supported search engine; Elasticsearch can no longer be used. For more information on how this affects your specific environment and your upgrade plans, please review Tech Update: Oracle PeopleSoft Transitions to OpenSearch (Article ID KB401747). Additionally, review the PeopleSoft Search and Insights Home Page (Article ID KA592) for complete instructions for implementing or upgrading to the correct version of OpenSearch for your new PeopleTools release.
- Password security has been enhanced as of PeopleSoft PeopleTools 8.57. In order to take advantage of the AES algorithm, reset the following passwords using PeopleTools 8.57 or later: CONNECT ID password, domain password, Access ID password. This is not applicable to user passwords.
- If you compared PeopleTools objects during the upgrade, evaluate the compare reports to help identify whether the delivered objects conflict with any of your customizations. The compare report will also show any changes that are delivered in the new PeopleTools

release. If you need to re-implement your customizations after the upgrade, you should avoid changing delivered PeopleTools objects because they may be updated in both PeopleTools patches as well as future PeopleTools releases.

- Beginning with PeopleTools 8.60.13 patch and PeopleTools 8.61 release, PKCS12 files require the use of the AES-256-CBC algorithm, including REN server p12 keystore files, whereas previous releases required PKCS12 files to use the RC2-40-CBC algorithm. If you are using an SSL-enabled REN server, you need to regenerate the REN server p12 keystore file.

For more details, please refer to E-REN: REN Server With SSL Not Working (Article ID KB392008).

If you are using certificates from the database for your REN server, please follow these steps:

1. Shut down your REN server.
2. Back up and remove the REN server p12 keystore file specified on your REN server definition page.
3. Start up your REN server, a new keystore file should be generated for you.

If you are using an external keystore for your REN server, please follow these steps:

1. Shut down your REN server.
2. Back up and remove the REN server p12 keystore file specified on your REN server definition page.
3. Regenerate the REN server keystore file to use the new algorithm.
4. Start up your REN server.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Enabling Oracle Transparent Data Encryption

Oracle's Transparent Data Encryption (TDE) feature was disabled at the beginning of the upgrade. If you had TDE enabled prior to the upgrade, then after finishing the upgrade you need to re-enable TDE by running scripts in the sequence specified in the following procedure.

To re-enable TDE:

1. Run *PS_HOME\SCRIPTS\postupgtdeprocess1.sql*.

The script *postupgtdeprocess1.sql* performs similarly to the script *preupgtdeprocess.sql*, which you ran at the beginning of the upgrade, to find any tables that are encrypted, generate a list of fields that need to have the PeopleSoft metadata encryption attribute re-enabled, and create the ENCRYPTEDTBLSA project. The ENCRYPTEDTBLSB project is compared with the ENCRYPTEDTBLSA project, and the resulting list of differences between the recfields is input to the script *postupgtdeprocess2.sql*.

See "Preparing for Your PeopleTools Upgrade," Preserving PeopleTools Configuration Data, Saving Transparent Data Encryption Information.

2. Run *PS_HOME\SCRIPTS\postupgtdeprocess2.sql*.

The script `postupgtdeprocess2.sql` generates four scripts, which you will run in the next step to reapply TDE to the records identified by the `postupgtdeprocess1.sql`. Review the generated scripts (particularly `pstderebuildfuncidx.sql`) to make sure that the syntax, sizing, and tablespace information is intact and is not split at the end of a line. If necessary, modify the scripts as needed for your environment.

3. Run the scripts that were generated when you ran `postupgtdeprocess2.sql` in the following order:
 - `pstdedropfuncidx.sql`
 - `pstdereencrypt.sql`
 - `pstderebuildfuncidx.sql`
 - `pstdereencryptmetadata.sql`
4. Run `PS_HOME\SCRIPTS\postupgtdevalidation.sql`.

The script `postupgtdevalidation.sql` validates that all tables and columns that were encrypted before the upgrade have maintained encryption. It lists any records that contain encrypted fields, but were not included in the `ENCRYPTEDTBL` project. It also sets the value for the TDE algorithm defined within `PSOPTIONS`.

See the online product documentation for PeopleTools: Data Management for your new release for more information about administering PeopleSoft databases on Oracle.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Enabling Oracle Fine Grained Auditing

After completing the final pass of the upgrade, you can re-enable Oracle Fine Grained Auditing (FGA).

To re-enable FGA:

1. Review the log file generated by running `preupgfgareport.sql` at the beginning of the upgrade.
2. Edit the script `pscreatefga.sql`, generated earlier in the upgrade, to remove any entries that no longer apply to the new release as some of the tables and columns referenced in the script may have been removed during the upgrade.

You may want to enable FGA on additional tables and columns in the new release.

3. After editing the script, run the `pscreatefga.sql` script to re-enable Oracle Fine Grained Auditing.

See "Preparing for Your PeopleTools Upgrade," Preserving PeopleTools Configuration Data, Saving Oracle Fine Grained Auditing Information.

See the online product documentation for PeopleTools: Data Management for your new release for more information about administering databases on Oracle.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	Oracle	All

Reviewing Change Control

Earlier in the upgrade process, in the beginning of the chapter “Applying PeopleTools Changes,” the Change Control feature was disabled. In this step, you re-enable Change Control, if your site uses this functionality.

To turn on Change Control:

1. Sign in to the Target database using PeopleSoft Application Designer.
2. Select Tools, Change Control, Administrator.

The following example shows the options available on the Change Control Administrator dialog box:

Figure 4-1 Change Control Administrator dialog box



3. Set “Use change control locking” and “Use change control history” according to your site specifications.

See “Applying PeopleTools Changes,” Turning Off Change Control.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All

Updating Application Objects

If you are a PeopleSoft Application customer, there may be additional fixes or Change Packages that need to be applied to your database to ensure compatibility of your application with the latest PeopleTools release. Review and perform any of the following instructions that apply for your application:

- For PeopleSoft Interaction Hub customers, review *E-PORTAL: Applications Portal's PeopleTools Upgrade Impacts* (Article ID KB282657) for any application resolutions that must be applied after upgrading to this PeopleSoft PeopleTools release.
- For PeopleSoft 9.2 customers, review *PeopleTools Upgrade Impacts for PeopleSoft 9.2 Applications* (Article ID KA597) for any application resolutions that must be applied after upgrading to this PeopleSoft PeopleTools release.
- For PeopleSoft 9.2 Application customers, review the instructions regarding the Object Delta Change Package to perform additional steps that should be completed after upgrading to this PeopleSoft PeopleTools release.

See the product documentation for PeopleTools: Change Assistant and Update Manager for your new release for more information about Creating and Applying Object Delta Change Package.

Properties

Database Orientation	Pass Type	Products	Platforms	Languages
Target	All	All	All	All