

**ORACLE®**

# Proactive Steps for Getting Ready for your PeopleSoft Upgrade

**Thursday, August 14, 2008  
10:00 AM MDT**

## **Teleconference Access:**

Toll Free – (888) 259-4812

Toll – (706) 679-4880

Conf. ID – 50269092

## **Upcoming live webcasts and recent recordings:**

**August 19, 2008: Update: UPK Application Specific Content for PeopleSoft Enterprise**

**August 19, 2008: JD Edwards World Demonstration of Netting AR and AP Transactions**

**August 26, 2008: Update: UPK application specific content for JD Edwards EnterpriseOne**

**August 26, 2008: Equal Employment Opportunity (EEO-1) Overview for JD Edwards World**

**September 9, 2008: eBill Payment Leverages Customer Self-Service to Improve Customer Service and Lower Costs**

**September 16, 2008: Overview of the Transparent Gateway for DB2**

**September 16, 2008: JD Edwards World: The Road to A9.1 – Upgrade Resources and Lessons Learned**

**September 16, 2008: Intrastat: Using Statistic Reporting for JD Edwards EnterpriseOne Sales and Procurement**

**September 17, 2008: JD Edwards EnterpriseOne: Troubleshooting Item Ledger/Item Balance Integrity Issues**

**October 15, 2008: JD Edwards EnterpriseOne 1099 Year-End Processing Refresher**

**October 16, 2008: JD Edwards World A9.1 Costs Extras in Discrete Manufacturing**

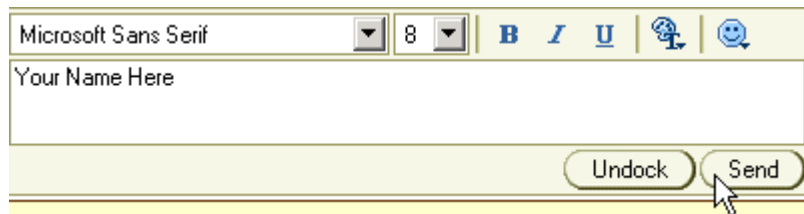
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# Agenda

- Presentation – approximately 45 minutes
- Q&A Session – approximately 15 minutes
  - *Please hold all questions to the end of the session.*
  - *To ask a question, move your cursor to the top of the screen and select the ‘bubble’ icon next to the moderator’s name.*



- *A dialog box will open. Enter your question and select “Send.”*



- *During the Q&A session your question will be read and an answer will follow.*

# ATTENTION – AUDIO INFORMATION

If you encounter any audio issues, please call InterCall (Audio Conferencing) and mute your phone.

1-888-259-4812

+1-706-679-4880

Conference ID: 50269092

We would like to encourage attendees with sufficient Internet bandwidth to listen through VoiceStreaming to continue to use this audio source.

Thank you.

# Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decision. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.



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## **Getting Ready for your PeopleSoft Upgrade**

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# Getting really ready for your Upgrade

What you can get out of this:

- avoid commonly encountered problems
- no need to ask commonly asked ??s
- be better prepared
- move through the upgrade confidently

# Assumptions

You might ...

--have done a PeopleSoft upgrade before

--have attended Data Management training

--have read over the upgrade documentation

...this is not      How to do an Upgrade

instead...      Getting Ready for an Upgrade

# Types of Upgrades

Application and Tools: Both app and tools are upgraded

HR 8.8 / PT 8.48 to HR 9.0 / PT 8.49.10

Tools Only: Only the Tools are upgraded

HR 9.0 / PT 8.48.17 to HR 9.0 / PT 8.49.10

Application Only: Only the Application is upgraded

HR 8.9 Mp1 / PT 8.49.10 to HR 9.0 / PT 8.49.10

Maintenance: “update” not “upgrade”

HR 9.0 / PT 8.49.10 to HR 9.0 MP3 / PT 8.49.10

# Gathering up what you need – the Upgrade Homepage

Customer Connection:

Navigate to Upgrade Guide / Upgrade Doc and Software/  
Upgrade Doc and Scripts / Release / Enterprise / your product /  
Your upgrade release / your upgrade

Bookmark your Upgrade Homepage!

# Upgrade homepage – example

PeopleSoft Home	<b>Implement, Optimize, and Upgrade » Upgrade Guide » Online Documentation</b>
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Implement, Optimize + Upgrade <ul style="list-style-type: none"><li><a href="#">Implementation Guide</a></li><li><a href="#">Optimization Guide</a></li><li>→ <a href="#">Upgrade Guide</a></li></ul>	<b>Date:</b> <a href="#">02/07/2007 07:10 PM</a> <b>Product Family:</b> Enterprise <b>Product Line:</b> Campus Solutions, HRMS, HRCS <b>Release:</b> PeopleSoft 9.0 <b>Title:</b> <b>PeopleSoft Enterprise HRMS 8.8x to HRMS and Campus Solutions 9.0 Upgrade</b>
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Updates + Fixes	
Support	
Oracle University	
Products + Services	

<b>Search</b> <input type="text"/> <input type="button" value="SEARCH"/>	
<b>Additional Search Engines:</b> <ul style="list-style-type: none"><li>» <a href="#">SARs</a></li><li>» <a href="#">Update Center</a></li><li>» <a href="#">Course Catalog</a></li></ul> <a href="#">Improve search results</a>   <a href="#">Site index</a>	

<b>Find What You Need</b> <ul style="list-style-type: none"><li>» <a href="#">Advisor Webcasts</a></li><li>» <a href="#">Contact Directory</a></li></ul>	<hr/> <h2>► Upgrade Certification Process</h2> <p>This page contains documentation and related information for the PeopleSoft Enterprise HRMS 8.8x to HRMS and Campus S prepare for your upgrade project, it is recommended that your project team becomes well versed in Application Engine and at Assistant class.</p> <hr/> <p><b>IMPORTANT!</b> This certified upgrade path is ONLY valid for the HRMS 8.8x to HRMS and Campus Solutions 9.0 Upgrade. If you 8.8x database with Pay/Bill Management, please see the HRMS 8.8x to HRMS and Campus Solutions 9.0, Including Pay/Bill M your upgrade instructions.</p> <hr/> <p>This PeopleSoft upgrade is performed via PeopleSoft Change Assistant. Data conversion scripts for Application Engine and C are needed to perform the upgrade.</p>
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# What's on the Homepage?

(**X**=to be downloaded for the Upgrade Job)

- **X** Template for Change Assistant
- **X** Upgrade doc .html format
- **X** Upgrade Planning exe
- **X** Required for Upgrade exe
- **X** UPGCONVERT exe
- **X** Upgrade Required Data exe

# What's on the Homepage?

...good to know

- Upgrade doc .pdf
  - Demo to Demo compare .xls record changes between releases involved
  - Certified Upgrade Path info
  - Upgrade's homepage history of postings (what was changed)
- Documents:
    - “Getting Started on your PeopleSoft Upgrade”
    - “Change Assistant for Upgrades”

# Homepage's upgrade certification section

## ▼ Upgrade Certification Process

Our upgrade certification process ensures your upgrade is predictable and successful. By the general availability date of every release, we'll post the upgrade path availability on this table. Please see our [upgrade path policy](#) for definitions of primary and by request levels. The dates noted in the table indicate our estimated delivery date of the upgrade path. Once delivered, we will indicate that an upgrade path is now "certified"--which means you can download the upgrade path at the bottom of this page. If a release is labeled with a "recommendation" link, follow it to the recommended alternative upgrade path description.

Release	Minimum PeopleTools	SQL Server	Oracle	Sybase	Informix	DB2 UDB for OS/390	DB2 UDB for Unix/NT
EPM 8.9 to 9.0	8.48.03	Certified for MSS2005 or higher	Certified for Oracle 9i or higher	---	---	Certified	Certified

# Homepage's demo-to-demo section

## ▼ Demo to Demo Compare Results

Do you want to know what PeopleSoft changed in the record structures between releases? These reports display the difference between the old release Demo database and the new Demo database, 9.0 MP5. Read the following documentation for details of these reports.



Demo to Demo compare reports explained.doc

## ▼ FSCM 8.4x to 9.0 MP5 Upgrade Demo to Demo Compare Report

### FSCM 8.42 to 9 Demo to Demo Results



FSCM842to9MP5\_HTML.exe



FSCM842to9MP5\_EXCEL.exe

RECORD NAME
ACCT_ATTRIB_S
ACCT_TYPCD_LNG
ACTION_LST
ACTION_TBL
ACTION_WL
ACT_BAL_GRP_D_S
ACT_BAL_GRP_S
ACT_REASN_CRIT

# More on the Homepage (app & tools upgrades)

Download and follow the directions under each executable:

Download and unzip these files. Copy the contents as follows into your PeopleSoft codeline...

- |                          |                  |
|--------------------------|------------------|
| 1) Upgrade Planning      | current codeline |
| 2) Required for Upgrade  | new codeline     |
| 3) UPGCONVERT            | new codeline     |
| 4) Upgrade Required Data | new codeline     |

➔ Do this right away!

# Getting the Source/Demo ready

## ... application upgrade example

- > Install the new Demo environment  
“Source”
- > Apply UPGCONVERT project, and other items from Upgrade’s homepage.
- > Apply Required-at-Upgrade bundles (if available) or updateids from Cust Conn.
- > Apply Minor tools patch e.g. 8.49.10

# Getting your environment ready

## ... Tools-only upgrade example

(Not really a Source and Target situation)

- > Copy your Environment to be upgraded
- > Load the new PeopleTools to the upgrading Environment's Ps\_Home
- > Set up the Change Assistant job with template and html documentation
- > Load Minor tools patch e.g. 8.49.10

# Minor Tools Patches...what you need to know

Tools 8.49.**10** “10” is the minor tools patch

→ Cumulative

patch 10 contains 1 through 10

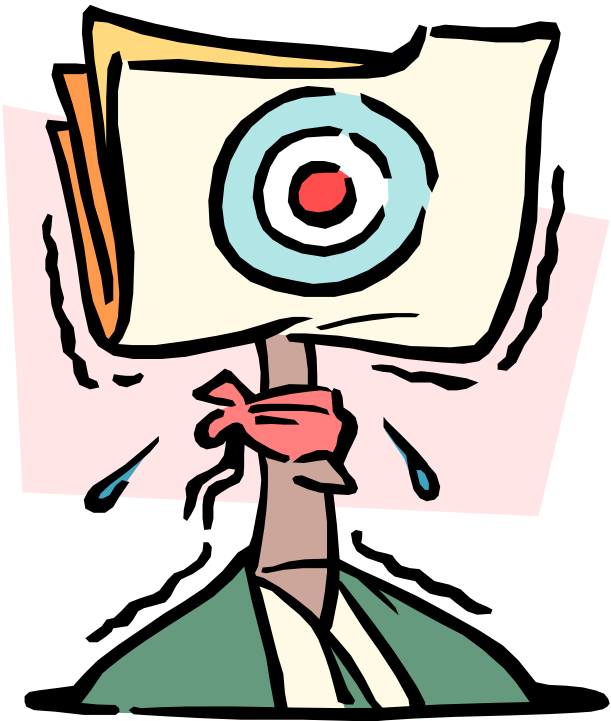
→ At least one is required for upgrade

check your upgrade for which M.T.P. is required

Certified Upgrade Path section on Homepage

Do you have to keep up with latest?

# Required-at-Upgrade: bundles or updateids



What are they?

Why apply these?

Where are they?

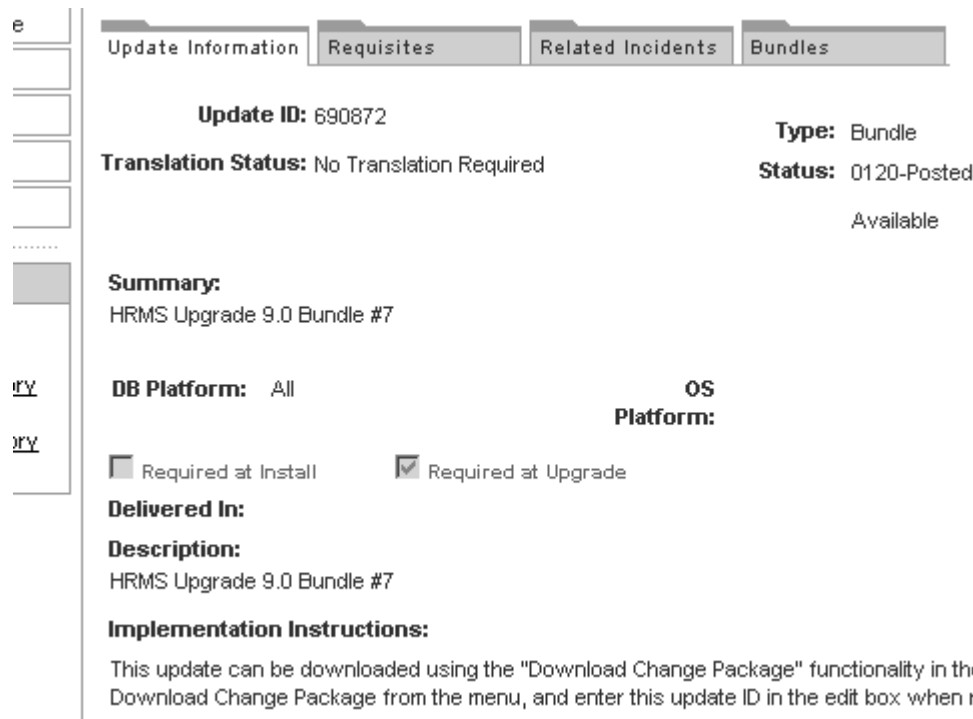
How are they applied?

Applied to what?

All of them?

# Required at Upgrade example

- Customer Connection / Updates and Fixes / Required for install or upgrade...



Update Information Requisites Related Incidents Bundles

**Update ID:** 690872 **Type:** Bundle

**Translation Status:** No Translation Required **Status:** 0120-Posted  
Available

**Summary:**  
HRMS Upgrade 9.0 Bundle #7

**DB Platform:** All **OS Platform:**

Required at Install  Required at Upgrade

**Delivered In:**

**Description:**  
HRMS Upgrade 9.0 Bundle #7

**Implementation Instructions:**  
This update can be downloaded using the "Download Change Package" functionality in the Change . Download Change Package from the menu, and enter this update ID in the edit box when requested.

# Finding the Required at Upgrade updates from the Update Gateway

## Change Assistant > Tools > Go to Customer Connection

Site index

What type of updates do you wish to include?

**Update Type:**

- All
- Bundles only
- Tax or regulatory updates only
- Documentation updates only
- Required to complete install
- Required to complete upgrade

**Posted Date:**

- Anytime
- Within this time period

From:

To:

Include pre-requisites and post-requisites not already applied to selected environment

# Required at Upgrade results from Update Gateway (example continued)

There are 7 primary updates that have met your search criteria.

There are 6 updates that are requisites of the primary updates.

Candidate Updates					Find	View All	First	1-6 of 7	Last
	Update ID	Type	Description	Post Date					
EXCLUDE	<a href="#">690872</a>	Primary	HRMS Upgrade 9.0 Bundle #7	03/11/08 3:57PM					
EXCLUDE	<a href="#">690869</a>	Primary, Requisite	HRMS Upgrade 9.0 Bundle #6	01/17/08 1:54PM					
EXCLUDE	<a href="#">690868</a>	Primary, Requisite	HRMS Upgrade 9.0 Bundle #5	11/05/07 2:55PM					
EXCLUDE	<a href="#">690867</a>	Primary, Requisite	HRMS Upgrade 9.0 Bundle #4	10/01/07 11:40AM					
EXCLUDE	<a href="#">690866</a>	Primary, Requisite	HRMS Upgrade 9.0 Bundle #3	08/21/07 4:36PM					
EXCLUDE	<a href="#">690864</a>	Primary, Requisite	HRMS Upgrade 9.0 Bundle #2	07/09/07 12:08PM					

# What should not be applied...to Demo

- Application bundles or updateids not categorized as required-for-upgrade
- Maintenance Packs\*\*

\*\*exceptions are Upgrades directly to CRM 9.0 Mp5,  
EPM 9.0 Mp5, and FSCM 9.0 Mp5

# Why not apply application bundles?

- Application bundles or updateids that are not Required-at-Upgrade may change records' structure
- Unexpected record structures can cause the Upgrade's data conversion programs to fail

# Required-at-Upgrade special situations

- Tools only upgrade: only apply minor tools patch
- Campus Solutions product
  - Regulatory Bundles same as copy of prod
- HRMS Upgrades: tax updates
  - Tax updates same release Source = Target
- Two step upgrades: 'wrappers'
  - HR 8.3 to 9.0 = HR 8.3 to 8.9mp1 and HR 8.9mp1 to 9.0
- Upgrade to 9.0 Mp5
  - Upgrades written *specifically* to 9.0 Mp5

# Change Assistant or Upgrade Assistant?

- One or the other – no choice
- Change Assistant tool evolved from the Upgrade Assistant
- The Upgrade's Homepage will say:
  - This PeopleSoft upgrade is written using the Upgrade Assistant
  - or -
  - This PeopleSoft upgrade is performed using the Change Assistant.

# Supported Platforms

Both Source and Target need to be on a certified, supported platform

See Supported Platforms database to check:  
[http://www.peoplesoft.com/corp/en/iou/platforms/platforms\\_supported.jsp](http://www.peoplesoft.com/corp/en/iou/platforms/platforms_supported.jsp)

If it's not there...do we support your upgrade?  
will it work? ...no way to know

# Are we there yet?

Variables that will affect your upgrade's timeline



- Team's experience with CA
- Team's other responsibilities
- Number of customizations
- Database size
- Testing plans
- Involvement of end users
- Your environment / space
- “ \_\_\_\_\_ ”
- ...add a fudge factor to the schedule...

# During the Upgrade - Got questions?

- Customer Connection: Knowledge Browser

  - > Customer Connection /Additional Search engines/

  - Knowledge Browser/** PeopleSoft Enterprise / Enterprise Tools /

  - Install and Upgrade / Upgrade

  - Spotlight solutions

  - Customer recommended solutions

- Customer Connection: Support

  - Make a case with GSC's install-upgrades team

  - > Customer Connection / support / online support

# Knowledge Browser

Home >> Enterprise >> Tools >> Upgrade

[Solution Search](#) || [Download Solutions List](#)

Select a category to browse solutions or documents

[Support Recommended](#) || [Customer Recommended](#) || [Newly Created](#) || [Active](#) || [Archived](#) || [PeopleBooks](#) ||

## Help Us Help You

### Support Recommended Solutions (Spotlight Solutions)

[What's this?](#)

- [201036989](#) E-FTP: ViewAttachment does not work after upgrade to tools 8.48.xx.
- [201065736](#) E-UPG Upgrade to FSCM 9.0 Mp5 - What you need to know
- [201033830](#) E-IU UPGPT848IBUG warnings unable to fully convert PeopleCode for...
- [201030475](#) E-UPG: Creating IB Objects using the AE program PTUPGCONVERT fails
- [201028535](#) E-UPG: UPGRDPASSWDS errors on PT8.48 Upgrade
- [201022974](#) E-UPG DLUPX16E.dms and DLUPX16I.dms in FS upgrade to 8.9
- [201009766](#) E-UPG Upgrade Browser compare reports
- [201003678](#) E-UPG Upgrade copy Portal RegistryStructure Definition Name not copied
- [201003150](#) E-UPG FSCM Upgrade to 8.9 - preserving customizations with UPGCUST project
- [201002240](#) EIU89: DLEPSYSI.dms fails with Datetime field overflow.
- [201058540](#) E-UPG: FSCM views fail to create for Tools only upgrade
- [200735241](#) E-UPG Adding New Product Modules for PeopleSoft Version 8.1x and 8.4x Tools.

### Customer Recommended Solutions (Frequently Used Solutions)

[What's this?](#)

- [201014691](#) E-UPG SYSAUDIT returns exceptions after applying the UPGOPT project
- [201055595](#) E-UPG: System Error : S-00103: Encountered the symbol "TABLE" during compares.
- [201051970](#) E-UPG: How to tell if your application will run on a newer PeopleTools version.
- [201040990](#) E-UPG: Compare UPGCUST project fails with "Core error loading project"

Rate this page

- Excellent
- Good
- Poor

Did this resolve the problem?

- Yes
- No
- Just Browsing

Was this easily located?

- Very Easy
- Somewhat Easy
- Not Easy

Overall Self Service Satisfaction?

- 10  9  8  7  6
- 5  4  3  2  1

Suggest Knowledge Gaps

Additional Feedback

\* Please click YES if the solution helps.

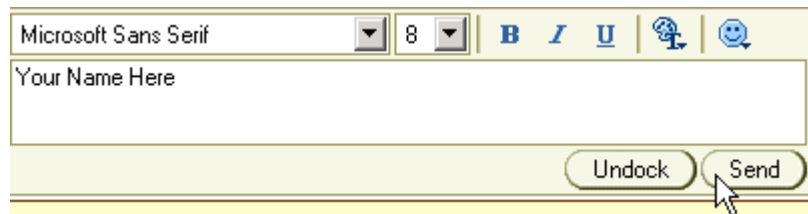
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# Questions

- *To ask a question, move your cursor to the top of the screen and select the ‘bubble’ icon next to the moderator’s name.*



- *A dialog box will open. Enter your question and select “Send.”*





# THANK YOU