

ORACLE®

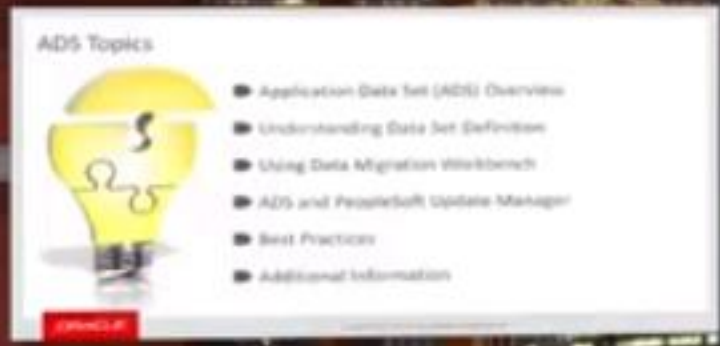


PeopleSoft Spotlight Series

Migrating Data with Application Data Sets

ORACLE®

ORACLE®



ADS Topics



- ▶ Application Data Set (ADS) Overview
- ▶ Understanding Data Set Definition
- ▶ Using Data Migration Workbench
- ▶ ADS and PeopleSoft Update Manager
- ▶ Best Practices
- ▶ Additional Information

ADS Topics

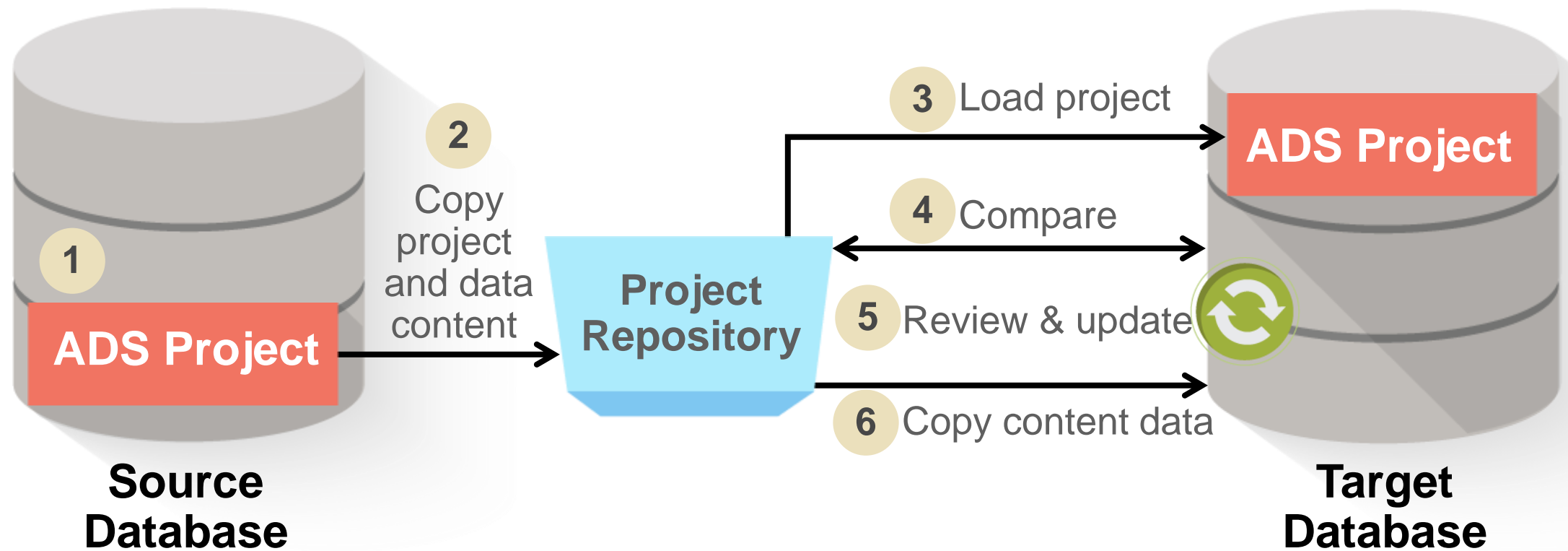


- ▶ Application Data Set Overview
- ▶ Understanding Data Set Designer
- ▶ Using Data Migration Workbench
- ▶ ADS and PeopleSoft Update Manager
- ▶ Best Practices
- ▶ Additional Information

What is Application Data Sets (ADS)?

- Application Data Sets (ADS) is the name given to a collection of technology used to migrate application/configuration data between PeopleSoft environments
- Application Data Sets is used as part of the Selective Adoption maintenance process and can also be used between two different PeopleSoft applications that have similar data structures
- The parts that make up ADS are:
 - Application Data Set Definitions and the Data Set Designer
 - ADS Projects
 - Data Migration Workbench

ADS Flow – Data Migration Workbench



Advantages

- Enable a simple UI for defining business objects consisting of tightly coupled data.
- Allow groups of logically related business objects to be copied and compared following the managed object project paradigm.
- Make the Managed Object functionality easily available to a wider sets of application data.
- Extend existing managed object metadata.
- Perform copies and compares on servers rather than workstations for better performance and efficiency.

Advantages

- Provide a compare facility for data currently moved by Data Mover.
- Provide better control of changes via an approval governance using the Approval Framework.
- Reduce errors with a validation framework that performs common validations out of the box and allows custom validations to be expressed in PeopleCode.
- Eliminate manually copying project files by providing a shared project file repository.

ADS is used to Migrate

PeopleTools Examples

- WorkCenters
- Related Content
- Pivot Grids
- Activity Guides
- Dashboards
- Pagelets

Application Examples:

- Global Payroll

ADS Topics



- ▶ Application Data Set Overview
- ▶ **Understanding Data Set Designer**
- ▶ Creating a Data Migration Workbench Project
- ▶ ADS and PeopleSoft Update Manager
- ▶ Best Practices
- ▶ Additional Information

Data Set and Data Set Instance

Hierarchy of records
with some collective properties



Data Set

Data content
representing a unit of work



Data Set Instance

Data Set

A data set definition defines the *shape* of the data set instances.

- A root record. The primary keys of the root record are then keys of the data set instance
- An optional hierarchy of related child records, where each child record includes the keys of its parent record.
- An optional set of properties.
- An optional set of relationships to other data sets, and their properties.
- An optional set of attribute groups and their properties.
- An optional application class having PeopleCode that controls the behavior of the data set instances at copy, compare and validate time.

Online Demo: PeopleTools>Lifecycle Tools> Migrate Data>Data Set Designer

Search Add

Data Set Search

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

*Search By begins with [Add a New Value](#)

[Advanced Search](#)

Search Results [Personalize](#) | [Find](#) | First 1-175 of 175 Last

| | Data Set Definition Name | Description | Object Owner ID |
|--------------------------|----------------------------|-----------------------------|-----------------|
| <input type="checkbox"/> | ACCOUNTING RULES | Accounting Rules | Contracts |
| <input type="checkbox"/> | ACCOUNTINGENTRY | Accounting Entry Template | Payables |
| <input type="checkbox"/> | ACSGRPS | Access Groups | |
| <input type="checkbox"/> | ACTIVITY_GUIDE_ITEM | Activity Guide Item | PeopleTools |
| <input type="checkbox"/> | ACTIVITY_GUIDE_LIST | Activity Guide List | PeopleTools |
| <input type="checkbox"/> | ALLOCATION_GROUP | Allocation Group | General Ledger |
| <input type="checkbox"/> | ALLOCATION_REQUEST | Allocation Request | General Ledger |
| <input type="checkbox"/> | ALLOCATION_STEP | Allocation Step Definitions | General Ledger |
| <input type="checkbox"/> | COMP_AVN_NODE_TEMPLATE_GBL | Node Template | Payables |
| <input type="checkbox"/> | COMP_BI_SUM_TEMPLATE_GBL | BI SUMMARY | Billing |

Online Demo: General page

- Example Data Set – Pivot Grid

General Relations Groups Properties Validation

Data Set Name PIVOTGRID_DEFINITION [Add a New Value](#)

Description Pivot Grid Definition

Long Description

Owner ID PeopleTools



Is Copyable

Derivation Type

Loaded from Component Manually entered

Define the record hierarchy for the data set definition.
The keys of the data set definition can be selected from the keys of the root record. [Add Record to Root](#)

Data Set Description

| RecordName |
|---|
| <input type="checkbox"/> PSPGCORE   |
| └─ <input type="checkbox"/> PSPGAXIS |
| └─ <input type="checkbox"/> PSPGCHRTFLRSOPT |
| └─ <input type="checkbox"/> PSPGCHTFLRSLANG |
| └─ <input type="checkbox"/> PSPGCALCOPT |
| └─ <input type="checkbox"/> PSPGCHARTOPT |
| └─ <input type="checkbox"/> PSPGCHARTOPTLNG |
| └─ <input type="checkbox"/> PSPGCORELANG |
| └─ <input type="checkbox"/> PSPGDISPOPT |
| └─ <input type="checkbox"/> PSPGGRIDOPT |
| └─ <input type="checkbox"/> PSPGMODEL |

Online Demo: Relations Page

[General](#) | [Relations](#) | [Groups](#) | [Properties](#) | [Validation](#)

From Data Set Name PIVOTGRID_DEFINITION
Description Pivot Grid Definition [Where Used](#)

Relations Find | View All First 1 of 1 Last

To Data Set Name RCF_SERVICES
Relation Name PIVOTGRID_DEFINITION.RCF_SERVICES
Description Pivot Grid Related Actions
Long Description Pivot Grid relations with respect to the complete related actions configuration object
From Cardinality 1..* **To Cardinality** 1..1 [View SQL](#)

Relation Mapping Personalize | Find | [\[?\]](#) | [\[Grid\]](#) First 1 of 1 Last

| From Data Set Record | From Data Set Field | From Set Control | To Data Set Record | To Data Set Field | To Set Control |
|----------------------|---------------------|--------------------------|--------------------|-------------------|--------------------------|
| PSPGCORE | PTPG_PGRIDNAME | <input type="checkbox"/> | PSPTCS_SRVCFG | PORTAL_OBJNAME | <input type="checkbox"/> |

Relation Criteria Personalize | Find | [\[?\]](#) | [\[Grid\]](#) First 1 of 1 Last

| Open | Record Field Name | Operation | Values | Details | Close | Logical |
|------|-----------------------------|-----------|--------------|---------|-------|---------|
| | T.PSPTCS_SRVCFG.PORTAL_NAME | = | '_PTCS_PTPG' | | | |

Relation Properties Find First 1-3 of 3 Last

| Property Name | Property Description | Value | Value Description |
|-------------------------|--|-----------------|---|
| Family | Assign families to tightly coupled data sets to enable processing together as a group through the compare and copy processes | Pivot Grid | Pivot Grid Family |
| Insert Into Project | When inserting a "From Data Set" instance into a project, insert related "To Data Set" instances into the same project either optionally or by default | Optional Insert | Insert related data set into project optionally |
| Insert Inverse Relation | When inserting a "To Data Set" instance into a project, insert related "From Data Set" instances into the same project either optionally or by default | Optional Insert | Insert related data set into project optionally |

Online Demo: Groups Page

General Relations **Groups** Properties Validation

Data Set Name PIVOTGRID_DEFINITION
Description Pivot Grid Definition

Data Set Groups Find | View All First 1 of 10 Last

Group Code PVG_AXISOPT_GRP
Group Name PVG_AXISOPT_GROUP
Group Description Pivot Grid Axis Options Group

Group Members Personalize | Find | View All First 1 of 1 Last

| Record Name | Field Name |
|-------------|------------|
| PSPGAXIS | SEQNO |

Group Properties Find First 1 of 1 Last

| Property Name | Property Description | Value | Value Description |
|----------------------|--|-------|-------------------|
| Merge Configurations | During copy, preserve any configuration changes made on the target data set instance if the fields changed are part of this data set group | | |

Online Demo: Properties Page

General Relations Groups **Properties** Validation

Data Set Name PIVOTGRID_DEFINITION

Description Pivot Grid Definition

Data Set Properties Find First 1 of 1 Last

| Property Name | Property Description | Value | Value Description |
|---------------------|---|----------------------|-------------------|
| Managed Object Name | Designate the data set as a managed object. If the object has a C++ manager, the property value is the C++ acronym for that object, such as RDM. Objects that do not have a C++ manager should leave this blank | PIVOTGRID_DEFINITION | |

[Return to Search](#)

Online Demo: Validation Page

General

Relations

Groups

Properties

Validation

Data Set Name PIVOTGRID_DEFINITION

Extension App Class

Package Name PTPG_ADSDEFN

App Package Path :

Application Class ID PTPVG_ValidationBase



ADS Topics



- ▶ Application data Set Overview
- ▶ Understanding Data Set Designer
- ▶ **Using Data Migration Workbench**
- ▶ ADS and PeopleSoft Update Manager
- ▶ Best Practices
- ▶ Additional Information

ADS Projects

ADS projects provide the ability to move, compare, validate, and merge configuration data.

Configuration data includes:

- Setup data
- Application data
- Tools configuration
- Managed objects

Data Migration Workbench facilitates the configuration management process by providing the interactive user interface.

Data Set Instance and Application Data Set Project

Data Set



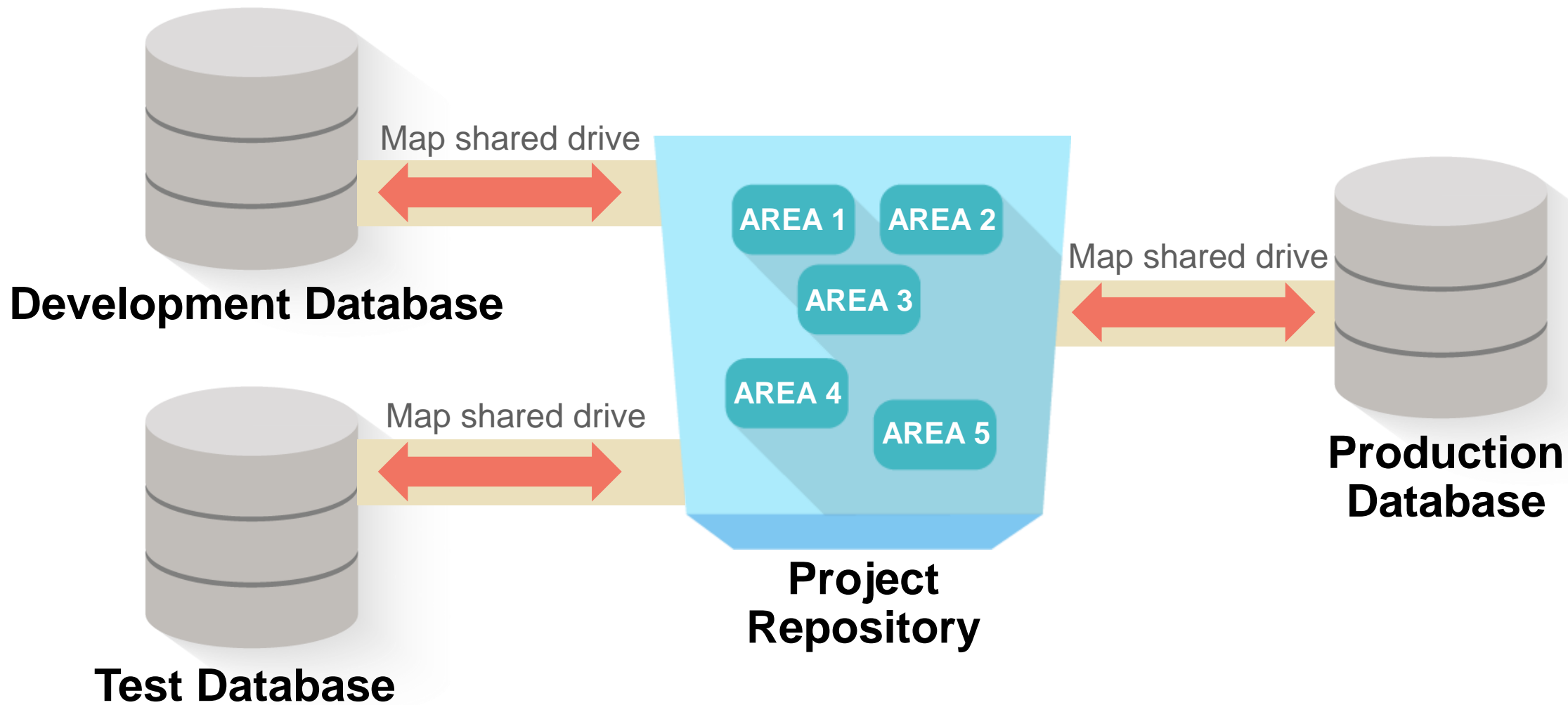
Data Set Instance

Data Set as a unit of work



ADS Project

Project Repository



Online Demo: File Locations

Manage File Locations

*Location Name Delete

Description

*Path

| Area |  First  1-3 of 3  Last |
|-----------|---|
| Area Name | |
| Demo | |
| Tools | |
| Training | |

Online Demo: Creating an ADS Project

- Select PeopleTools, Lifecycle Tools, Migrate Data, Data Migration Workbench
- demo

Add New Project

*Project Name

*Description

Online Demo: Insert Data Set Content Page

Insert Data Set Content

This page allows users to identify and insert instances of data into the project. Users can limit the scope of the result set by entering and refining search criteria.

Project Name DEMO1
Data Set Name PIVOTGRID_DEFINITION Pivot Grid Definition

| Search Values ? | | | | View All [?] First 1 of 1 Last |
|-----------------|------------|----------------------|----------------------------------|--|
| *Field Name | *Operation | Values | Details | |
| PTPG_PGRIDNAME | = | <input type="text"/> | <input type="button" value="+"/> | |

| Insert Related Data Sets ? | | | Find [?] [grid icon] | First 1 of 1 Last |
|----------------------------|---------------|-------------|--------------------------|-----------------------|
| select2 | Data Set Name | Description | | |
| <input type="checkbox"/> | RCF_SERVICES | RC Services | | |

Online Demo: Select Content

Insert Data Set Content

This page allows users to identify and insert instances of data into the project. Users can limit the scope of the result set by entering and refining search criteria.

Project Name DEMO1
Data Set Name PIVOTGRID_DEFINITION Pivot Grid Definition

| Search Values ? | | | View All [?] First 1 of 1 Last |
|-----------------|------------|--------|----------------------------------|
| *Field Name | *Operation | Values | Details |
| PTPG_PGRIDNAME | Like | ENR | [+] |

[Search]

| Insert Related Data Sets ? | | | Find [?] [grid] First |
|----------------------------|--------------|-------------|-------------------------|
| select2 Data Set Name | Description | | |
| <input type="checkbox"/> | RCF_SERVICES | RC Services | |

Select All Data Sets Deselect All Data Sets

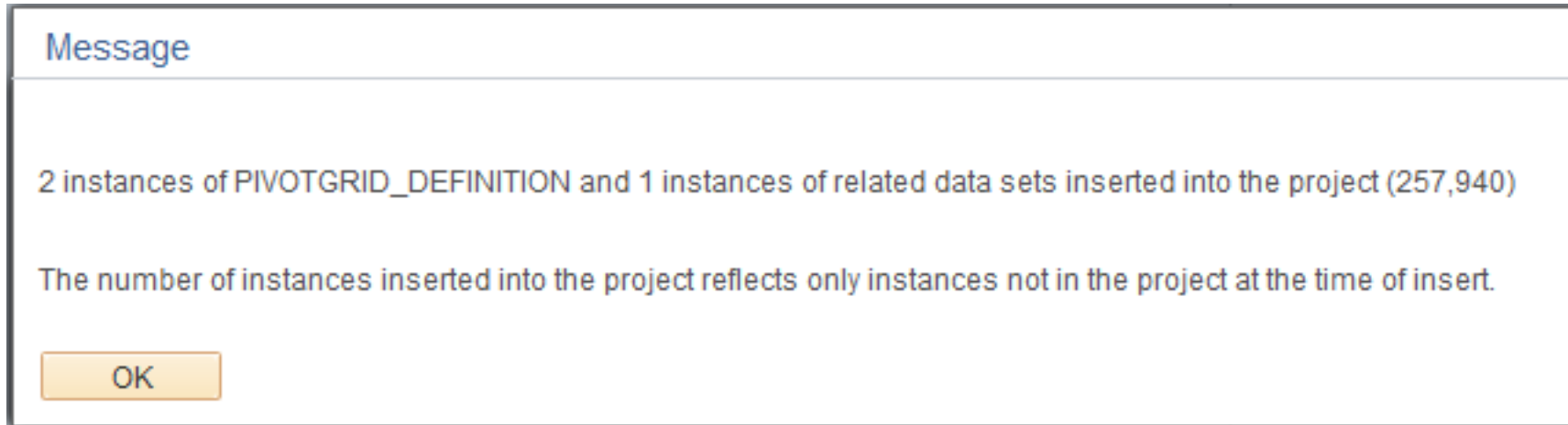
| Search Results | | |
|--------------------------|-----------------------|-----------------------|
| select2 | Pivot Grid Name | Pivot Grid Title |
| <input type="checkbox"/> | ENROLLMENTS | Enrollments for PSU |
| <input type="checkbox"/> | ENROLLMENTS_BY_COURSE | Enrollments by Course |
| <input type="checkbox"/> | ENROLLMENT_2012 | 2012 Enrollments |
| <input type="checkbox"/> | ENROLL_SEARCH | Course enrollment |
| <input type="checkbox"/> | PV_ENR_BY_YR_URL | PV_ENR_BY_YR_URL |

Select All Deselect All Insert Content

Insert and Return Cancel

This is not a slide – but the online demo


Message



Project Name DEMO1

*Description

Comments

Project State New project 

Progress

Copy To File

Validate

Compare

Submit for Copy

Check Integrity





Project Content 

[View All](#)

[First](#) 

1-2 of 2 

[Last](#)

| Data Set Name | Description | | |
|--------------------------------------|-----------------------|---|---|
| PIVOTGRID_DEFINITION | Pivot Grid Definition |  |  |
| RCF_SERVICES | RC Services |  |  |

Save

Save As...

Update Project Action...

[Return to Search](#)

[Work Approvals](#)

[Process Monitor](#)

[Add a New Value](#)

Online Demo: Target Database

Project Search

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ **Search Criteria**

| | | |
|---------------------|----------------------|--|
| Project Name | <input type="text"/> | Add a New Value |
| Description | <input type="text"/> | Load Project From File |

Online Demo: Compare

[New Window](#) | [Help](#)

Project Name DEMO1

***Description**

Comments

Project State Loaded from file 

Progress

Copy To File

Validate

Compare

Submit for Copy

Check Integrity

▶ **Filters** 

Project Content 

[View All](#) [First](#)  1-2 of 2  [Last](#)

| Data Set Name | Description |
|--------------------------------------|-----------------------|
| PIVOTGRID_DEFINITION | Pivot Grid Definition |
| RCF_SERVICES | RC Services |

Save

Save As...

Update Project Action...

[Return to Search](#)

[Work Approvals](#)

[Process Monitor](#)

[Add a New Value](#)

Online Demo: Compare from File Page

Compare From File

Run Control ID DEMO1

[Report List](#)

[Process Monitor](#)

[Run](#)

Project Information

Project Name DEMO1

PivotGrid example

Location Name REPOSITORY

ADS Repository

Area Name Demo

Selection Criteria

Data Sets

| Select | Data Set Name | Description |
|-------------------------------------|----------------------|-----------------------|
| <input checked="" type="checkbox"/> | PIVOTGRID_DEFINITION | Pivot Grid Definition |
| <input checked="" type="checkbox"/> | RCF_SERVICES | RC Services |

[Select All Data Sets](#)

[Deselect All Data Sets](#)

Include Language-Neutral Data

Languages

| Select | Language |
|-------------------------------------|----------|
| <input checked="" type="checkbox"/> | English |

[Select All Languages](#)


[Deselect All Languages](#)

Online Demo: Viewing Compare Reports

Project Name DEMO1

*Description

Comments

Project State Compare from file succeeded 

Progress


Copy To File




Validate

Compare

Submit for Copy

Check Integrity

► Filters 

| Project Content  | | View All | | First  | 1-2 of 2  | Last |
|---|-----------------------|-----------|-----------|---|--|----------|
| Data Set Name | Description | Additions | Deletions | Differences | Same | Messages |
| PIVOTGRID_DEFINITION | Pivot Grid Definition | 1 | 0 | 1 | 0 | 2 |
| RCF_SERVICES | RC Services | 1 | 0 | 0 | 0 | 1 |

Online Demo: Click on PIVOTGRID_DEFINITION

Project Name **DEMO1**

PivotGrid example



State Compare from file succeeded

Data Set Name PIVOTGRID_DEFINITION

Pivot Grid Definition

▶ Filters ?

Data Set Content

| Pivot Grid Name | Copy Action | Type | Details | Copy Done | Messages |
|-----------------------|-------------|-----------|---|--------------------------|---|
| ENROLLMENTS | Merge ▼ | Different |  | <input type="checkbox"/> |  |
| ENROLLMENTS_BY_COURSE | Merge ▼ | Addition |  | <input type="checkbox"/> |  |

Online Demo: Messages

Project Name **DEMO1**

PivotGrid example

State Compare from file succeeded

Data Set Name PIVOTGRID_DEFINITION

Pivot Grid Definition


Instance Keys PTPG_PGRIDNAME=ENROLLMENTS


Datetime Validated 02/17/2015 3:39:43.403000PM


Project Navigator

Comparing FILE (Source) to T1B85402 (Target)

 DEMO1 - PivotGrid example

 PIVOTGRID_DEFINITION - Pivot Grid Definition

 Instance Keys - PTPG_PGRIDNAME=ENROLLMENTS

 PSPGCORE - Core Pivot Grid Record

Filter By

*Record Name

*Message Severity

Show Results Without Merge

Apply

Validation Report

Personalize | Find | View All |  |  | First  1 of 1  Last

| Record Name | Validation Type | Message Severity | Message Text | Explanation |
|-------------|-----------------------------|------------------|--|---|
| 1 PSPGCORE | Pre Copy Compare Validation | Informational | Validation of data set instance completed with no errors (257,515) | There are no errors in validating this data set instance. |

Online Demo: Compare Report Details

Project Name DEMO1

PivotGrid example

State Compare from file succeeded

Data Set Name PIVOTGRID_DEFINITION

Pivot Grid Definition

Compared 02/17/2015 3:39PM

Data Set Instance ?

Instance Keys PTPG_PGRIDNAME=ENROLLMENTS

*Copy Action Merge Copy and Keep Configurations

Copy Done



Display Order ?

Record/Field

Record/Group/Field

Group/Record/Field

Filters ?

Compare Report ?

Personalize | Find | View All | First 1-4 of 4 Last

General Additional

| Context | Keep Configurations | Item Action | Source Value | Current Target Value | Proposed Target Value |
|-----------------------------|---------------------|-------------|--------------|----------------------|-----------------------|
| + Group: No Group | | Add | | | |
| + Group: PVG_CORE_GROUP | | Keep | | | |
| + Group: PVG_MODEL_GROUP | | Add | | | |
| + Group: PVG_QRYPRMPT_GROUP | | Keep | | | |

Online Demo: Compare Report

Compare Report ? Personalize | Find | View All | | First 1-4 of 4 Last

General Additional

| Context | Keep Configurations | Item Action | Source Value | Current Target Value | Proposed Target Value |
|--|---------------------|-------------|--------------|----------------------|-----------------------|
| <input type="checkbox"/> Group: No Group | | Add | | | |
| <input type="checkbox"/> Group: PVG_CORE_GROUP | | Keep | | | |
| <input type="checkbox"/> Group: PVG_MODEL_GROUP | | Add | | | |
| <input type="checkbox"/> Group: PVG_QRYPRMPT_GROUP | | Keep | | | |

| | | | | | |
|---|--|-----|---------------|--|---------------|
| <input type="checkbox"/> Group: No Group | | Add | | | |
| <input type="checkbox"/> Core Pivot Grid Record: ENROLLMENTS | | Add | | | |
| <input type="checkbox"/> Pivot Grid Model Record: A.TOOLS_REL | | Add | | | |
| Pivot Grid Name | | Add | ENROLLMENTS | | ENROLLMENTS |
| Unique Heading | | Add | A.TOOLS_REL | | A.TOOLS_REL |
| Data Source Columns | | Add | Tools Release | | Tools Release |

Online Demo: Expand Records

| Compare Report ? | | Personalize Find View All | | | | First | 1-11 of 11 | Last |
|---|-------------------------------------|-------------------------------|----------------------------|----------------------------|----------------------------|-------|------------|------|
| General | | | | | | | | |
| Context | Keep Configurations | Item Action | Source Value | Current Target Value | Proposed Target Value | | | |
| <input type="checkbox"/> Group: No Group | | Add | | | | | | |
| <input checked="" type="checkbox"/> Core Pivot Grid Record: ENROLLMENTS | | Add | | | | | | |
| <input type="checkbox"/> Group: PVG_CORE_GROUP | | Keep | | | | | | |
| <input type="checkbox"/> Core Pivot Grid Record: ENROLLMENTS | <input checked="" type="checkbox"/> | Keep | | | | | | |
| Last Update Date/Time | | Keep | 2015-02-11-17.00.05.000000 | 2013-04-08-09.57.37.000000 | 2013-04-08-09.57.37.000000 | | | |
| Last Update User ID | | Keep | VP1 | PTTRN | PTTRN | | | |
| <input checked="" type="checkbox"/> Group: PVG_MODEL_GROUP | | Add | | | | | | |
| <input type="checkbox"/> Group: PVG_QRYPRMPT_GROUP | | Keep | | | | | | |
| <input type="checkbox"/> Core Pivot Grid Record: ENROLLMENTS | | Keep | | | | | | |
| <input type="checkbox"/> Pivot Grid Prompt record: ENROLLMENTS.View, -, BIND3 | <input checked="" type="checkbox"/> | Keep | | | | | | |
| Visible Prompt | | Keep | Y | N | N | | | |

Online Demo: PVG_MODEL_GROUP

| | | | | |
|---|-------------------------------------|-----|--------|--------|
| <input type="checkbox"/> Group: PVG_MODEL_GROUP | | Add | | |
| <input type="checkbox"/> Core Pivot Grid Record: ENROLLMENTS | | Add | | |
| <input type="checkbox"/> Pivot Grid Model Record: A.TOOLS_REL | <input checked="" type="checkbox"/> | Add | | |
| Column Label | | Add | | |
| Total Name | | Add | | |
| Field Format | | Add | String | String |
| Aggregate Functions | | Add | | |
| Total Name | | Add | Yes | Yes |
| Format Type | | Add | 0 | 0 |
| SetID | | Add | | |
| Set Control Value | | Add | | |
| Tree Name | | Add | | |
| Effective Date | | Add | | |
| Tree Node | | Add | | |

Online Demo: Additional

| Compare Report ? | | | | | | |
|---|--|-------------|-------------------------|--------------------|---------------------|-------------|
| Personalize Find View All First | | | | | | |
| General | | Additional | | | | |
| Group Name | Key Names and Values | Record Name | Record Description | Field Name | Field Description | Configurati |
| No Group | | PSPGCORE | Core Pivot Grid Record | | | |
| PVG_CORE_GROUP | | PSPGCORE | Core Pivot Grid Record | | | |
| PVG_MODEL_GROUP | | PSPGMODEL | Pivot Grid Model Record | | | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS | PSPGCORE | Core Pivot Grid Record | | | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | | | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_DSCOLUMNALIAS | Column Label | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_TOTALNAME | Total Name | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_FORMAT | Field Format | String |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_AGGREGATE | Aggregate Functions | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_TOTAL | Total Name | Yes |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_FORMATTYPE | Format Type | 0 |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | SETID | SetID | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | SETCNTRLVALUE | Set Control Value | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | TREE_NAME | Tree Name | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | PTPG_TREE_EFFDT | Effective Date | |
| PVG_MODEL_GROUP | PTPG_PGRIDNAME=ENROLLMENTS, PTPG_DSUNIQUEFLD=A.TOOLS_REL | PSPGMODEL | Pivot Grid Model Record | TREE_NODE | Tree Node | |

Online Demo: PVG_QRYPRMPT_GROUP

| | | | | | |
|--|-------------------------------------|------|---|---|---|
| [-] Group: PVG_QRYPRMPT_GROUP | | Keep | | | |
| [-] Core Pivot Grid Record: ENROLLMENTS | | Keep | | | |
| [-] Pivot Grid Prompt record: ENROLLMENTS.View, -, BIND3 | <input checked="" type="checkbox"/> | Keep | | | |
| Visible Prompt | | Keep | Y | N | N |

Online Demo: Filters

Filters ?

Results will be displayed where the selected filter criteria are true

| Message Type | Type | *Copy Action | |
|---|---|--------------|---|
| <input checked="" type="checkbox"/> Error | <input checked="" type="checkbox"/> Additions | Any | <input type="checkbox"/> Show Results Without Merge |
| <input checked="" type="checkbox"/> Warning | <input checked="" type="checkbox"/> Deletions | Any | |
| <input checked="" type="checkbox"/> Info | <input checked="" type="checkbox"/> Differences | Any | |
| <input checked="" type="checkbox"/> None | <input checked="" type="checkbox"/> Same | | |

Apply

Online Demo: Customized

Project Name **DEM01**

PivotGrid example

State Compare from file succeeded

Data Set Name PIVOTGRID_DEFINITION

Pivot Grid Definition

▼ **Filters** ?

Results will be displayed where the selected filter criteria are true

| | | | |
|---|---|---|---|
| Message Type <ul style="list-style-type: none"><input checked="" type="checkbox"/> Error<input checked="" type="checkbox"/> Warning<input checked="" type="checkbox"/> Info<input checked="" type="checkbox"/> None | Type <ul style="list-style-type: none"><input type="checkbox"/> Additions<input type="checkbox"/> Deletions<input checked="" type="checkbox"/> Differences<input type="checkbox"/> Same | *Copy Action <input type="text" value="Any"/> | <input type="checkbox"/> Show Results Without Merge |
| | | *Copy Done <input type="text" value="Any"/> | |
| | | *Customized <input type="text" value="Yes"/> | |

Apply

Data Set Content

| Pivot Grid Name | Copy Action | Type | Details | Copy Done | Messages |
|-----------------|------------------------------------|-----------|---------|--------------------------|----------|
| ENROLLMENTS | <input type="text" value="Merge"/> | Different | | <input type="checkbox"/> | |

Online Demo: Submit For Copy

Perform ADS operation

Copy From File

Run Control ID DEMO1

[Report List](#)

[Process Monitor](#)

[Run](#)

Project Information

Project Name DEMO1 PivotGrid example
Location Name REPOSITORY ADS Repository
Area Name Demo

Selection Criteria

| Data Sets | | |
|-------------------------------------|----------------------|-----------------------|
| Select | Data Set Name | Description |
| <input checked="" type="checkbox"/> | PIVOTGRID_DEFINITION | Pivot Grid Definition |
| <input checked="" type="checkbox"/> | RCF_SERVICES | RC Services |

[Select All Data Sets](#) [Deselect All Data Sets](#)

| Languages | |
|-------------------------------------|----------|
| Select | Language |
| <input checked="" type="checkbox"/> | English |

[Select All Languages](#) [Deselect All Languages](#)

Merge Target Configurations

Check Integrity After Copy

Online Demo: Submit for Copy

Project State Scheduled for copy from file



Progress

A rectangular progress bar with a thin black border and a white background, currently empty.

Project State Copy from file succeeded



Progress

A rectangular progress bar with a thin black border and a white background, currently empty.

Online Demo: Copy Example

Project Name TRN_MSGS

*Description Training Messages

Comments Message sets for training - 30003 and 30004

Project State Compare from file succeeded 

Progress

Copy To File

Validate


Compare

Submit for Copy

Check Integrity

Filters 

Project Content 

View All First  1 of 1  Last

| Data Set Name | Description | Additions | Deletions | Differences | Same | Messages |
|---------------|-------------------------|-----------|-----------|-------------|------|----------|
| MSG | Message Catalog Entries | 1 | 0 | 1 | 0 | 2 |

Online Demo: Compare Report

Project Name TRN_MSGS

Training Messages





State Compare from file succeeded

Data Set Name MSG

Message Catalog Entries

▶ Filters ?

Data Set Content

| Message Set Number | Copy Action | Type | Details | Copy Done | Messages |
|--------------------|-------------|-----------|---|--------------------------|---|
| 30003 | Copy ▾ | Different |  | <input type="checkbox"/> |  |
| 30004 | Copy ▾ | Addition |  | <input type="checkbox"/> |  |

Online Demo

Data Set Instance ?

Instance Keys MESSAGE_SET_NBR=30003

*Copy Action Copy Copy Done ← →

Filters ?

Compare Report ? Personalize | Find | View All | ↗ | 📄 First ↶ 1-14 of 14 ↷ Last

General Additional ☰

| Context | Item Action | Current Target Value | Proposed Target (Source) Value |
|-------------------------|-------------|--|--|
| [-] Message Sets: 30003 | Change | | |
| Version | Change | 47 | 51 |
| [-] Message Catalog: 1 | Change | | |
| Last Update Timestamp | Change | 2012-05-31-11.59.00.704000 | 2015-03-31-11.49.17.741000 |
| [-] Message Catalog: 2 | Change | | |
| Message Text | Change | This will check all courses to start within 7 days | This will check all courses to start within 7 days of date entered |
| Last Update Timestamp | Change | 2012-05-31-11.59.00.704000 | 2015-03-31-11.49.17.742000 |
| [-] Message Catalog: 3 | Add | | |
| Message Set Number | Add | | 30003 |
| Message Number | Add | | 3 |
| Message Text | Add | | Course %1 session %2 on %3 needs an instructor assigned. |
| Message Severity | Add | | Message |
| Last Update Timestamp | Add | | 2015-03-31-11.49.17.745000 |
| Description | Add | | %1 = Course Code %2= Session number %3=Start date |

Online Demo

Project Name TRN_MSGS

Training Messages

State Compare from file succeeded

Data Set Name MSG

Message Catalog Entries

Compared 03/31/2015 12:53PM

Data Set Instance

Instance Keys MESSAGE_SET_NBR=30004

*Copy Action Copy from Source


Copy Done






Filters

Compare Report

Personalize | Find | View All |   First  1-19 of 19  Last

General Additional 

| Context | Item Action | Current Target Value | Proposed Target (Source) Value |
|--|-------------|----------------------|--------------------------------|
|  Message Sets: 30004 | Add | | |
| Message Set Number | Add | | 30004 |
| Version | Add | | 29 |
| Short Description | Add | | Fluid |
| Description | Add | | Fluid Training |
|  Message Catalog: 1 | Add | | |
| Message Set Number | Add | | 30004 |
| Message Number | Add | | 1 |
| Message Text | Add | | Start Date %1 for course %2 |
| Message Severity | Add | | Message |
| Last Update Timestamp | Add | | 2015-01-23-11.36.32.267599 |
| Description | Add | | |
|  Message Catalog: 2 | Add | | |

Data Migration Workbench

With it you can . . .

- Create a new ADS project on the source database containing specific data set instances
- Compare the ADS project to the target database
- View and analyze the compare reports
- Override copy or merge action as necessary
- Copy the project from file to the target database

ADS Topics

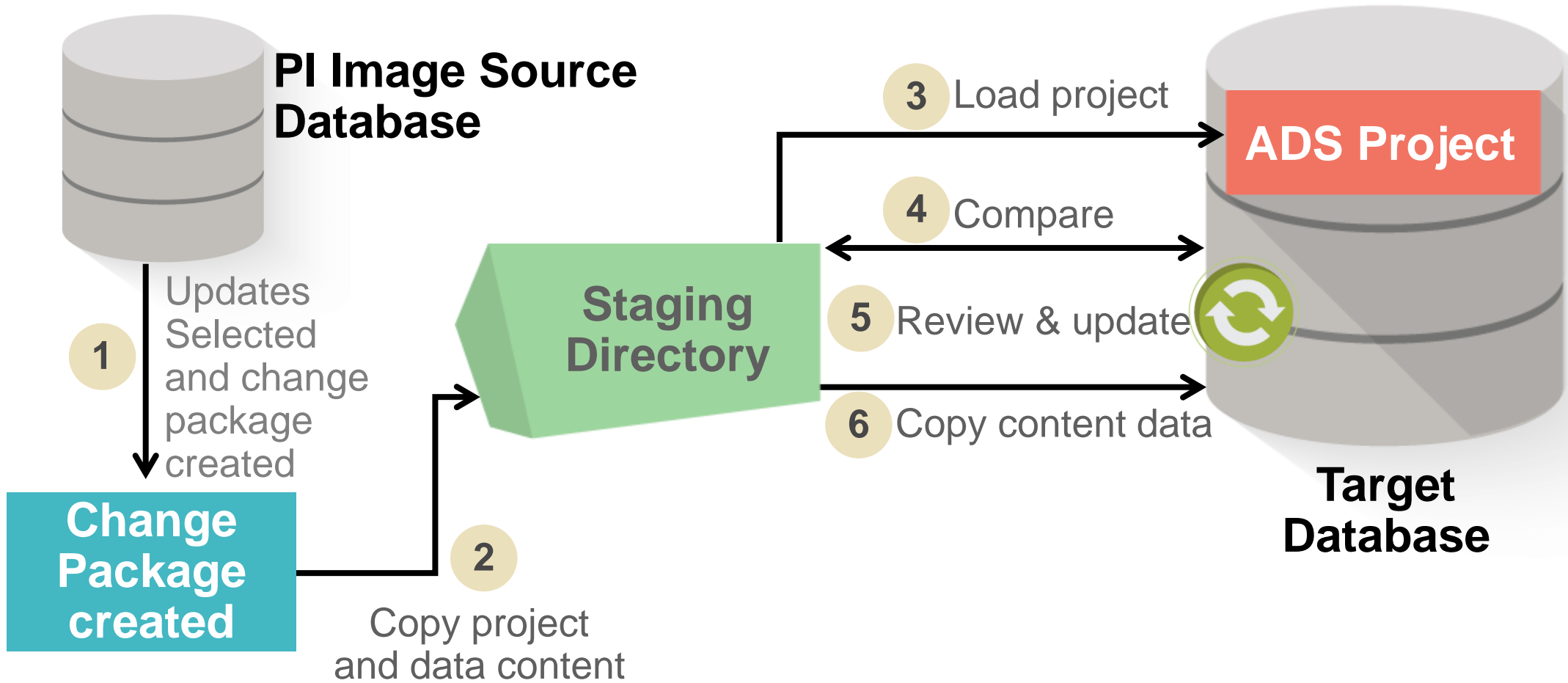


- ▶ Application Data Set Overview
- ▶ Understanding Data Set Designer
- ▶ Using Data Migration Workbench
- ▶ **ADS and PeopleSoft Update Manager**
- ▶ Best Practices
- ▶ Additional Information







ADS and PeopleSoft Update Manager



- Configuration data is delivered as an ADS project
- If there are multiple ADS projects in the selected updates, they will be combined into one project to optimize performance and simplify the update process
- Steps for ADS projects are created in the Change Assistant template

ADS Flow In PUM














Online Demo

- ▼  softwareupdate.XXX.{5d0ff109-bec6-11e4-9380-c3dd59731d93}
 - ▼ ▶ Planning Your Application Maintenance
 - ▼  Understanding Your Maintenance
 - Review Change Package
 - ▼ ▶ Preparing for Application Changes
 - ▼  Running the Initial Filters
 - Running the Initial Filter Queries
 - ▼  Pre-processing Requirements
 - Running DataMover UPD19308015_PRE
 - ▼  Exporting Non-Managed Metadata
 - Running DataMover - Message Catalog Export
 - Running DataMover - Tree Export
 - ▼  Exporting ADS Managed Object Metadata
 - Copying ADS-MO Project To File

- ▼  Running and Reviewing Managed Object ADS Compares
 - Applying Required Fix for ADS Compare and Copy
 - Applying Required Fix for ADS Compare and Copy2
 - Applying Required Fix for ADS Compare and Copy 3
 - Comparing ADS MO Project From File
 - Reviewing CP MO-ADS Compare Reports
- ▼  Applying Managed Object ADS Projects
 - Copying ADS MO Project From File - IP

Online Demo

- ▼  Running the Initial Filters
 - ✓ Running the Initial Filter Queries
- ▼  Exporting Non-Managed Metadata
 - ✓ Running DataMover - Message Catalog Export
 - ✓ Running DataMover - Tree Export
- ▼  Exporting ADS Managed Object Metadata
 - ✓ Copying ADS-MO Project To File
- ▼  Applying Application Changes
 - ▼  Importing Non-Managed Metadata
 - ✓ Running DataMover - Message Catalog Import
 - ✓ Running DataMover - Tree Import
 - ▼  Running and Reviewing Compare Reports
 - ✓ Running CP Compare Reports
 - Reviewing CP Compare Reports
 - ▼  Applying the Managed Object Project
 - ◆ Copying Update Project - Part 1
 - ◆ Copying Update Project - Part 2
 - ◆ Copying Update Project - Part 3
 - ◆ Compiling Directive Peoplecode
 - ◆ Updating Tree Counts
 - ◆ Resetting Object Version Numbers
 - ▼  Managing Customizations
 - Re-Applying Customizations
 - Compare and Merge Files
 - Using the Change Impact Analyzer
 - ▼  Updating Database Overrides
 - ◆ Setting Tablespace Names After Copy
 - ▼  Running and Reviewing Managed Object ADS Compares
 - ◆ Comparing ADS MO Project From File
 - Reviewing CP MO-ADS Compare Reports
 - ▼  Applying Managed Object ADS Projects
 - ◆ Copying ADS MO Project From File - IP

Online Demo: Reviewing Report

Project Name DEMOPTM

*Description SP Data Migration Project

Comments This is a data migration project for the Selective Packaging process. \r\n**** PI Release - FIN/SCM.9.2..10****

Project State Compare from file succeeded

Progress

Copy To File

Validate

Compare

Submit for Copy

Check Integrity

Filters ?

Project Content ?

View All

First

1-4 of 4

Last

| Data Set Name | Description | Additions | Deletions | Differences | Same | Messages |
|-------------------------|------------------------------|-----------|-----------|-------------|------|----------|
| PIVOTGRID_DEFINITION | Pivot Grid Definition | 12 | 0 | 0 | 0 | 12 |
| PTPPB_PAGELET | Pagelet Wizard Pagelets | 12 | 0 | 0 | 0 | 12 |
| RCF_SERVICES | RC Services | 12 | 0 | 0 | 0 | 0 |
| RCF_SERVICE_DEFINITIONS | Related Content Service defn | 22 | 0 | 0 | 0 | 22 |

Save

Save As...

Update Project Action...

Return to Search

Process Monitor

Add a New Value

ADS Topics



- ▶ Application Data Set Overview
- ▶ Understanding Data Set Designer
- ▶ Using Data Migration Workbench
- ▶ ADS and PeopleSoft Update Manager
- ▶ **Best Practices**
- ▶ Additional Information

PeopleSoft Roles

- PeopleSoft data owners
 - Create data set definitions
- PeopleSoft development
 - Incorporate ADS projects in updates delivered in PUM

Customer Roles

- PUM users

Use the Data Migration Workbench to review compare reports and update ADS projects as necessary.

Use the filters in Data Migration Workbench to narrow down the search results.

- Developers

Use delivered data sets to migrate content data.

Use Data Set Designer to create data sets for custom definitions.

Use Data Migration Workbench to create, compare and copy custom definitions.

- Reviewers

If Approval Framework is implemented reviewers will approve the Copy from File before the data is copied into the target database.

ADS Topics



- ▶ Application Data Set Overview
- ▶ Understanding Data Set Designer
- ▶ Using Data Migration Workbench
- ▶ ADS and PeopleSoft Update Manager
- ▶ Best Practices
- ▶ **Additional Information**

Additional Resources

PeopleSoft Online Help - PeopleSoft PeopleTools 8.54

- Data Migration Workbench

Oracle University Training

- PeopleSoft Lifecycle Management Rel 8.53 (4 day course)
- PeopleSoft Update Manager Rel 8.54 (2 day course)
- PeopleSoft Lifecycle Mgmt & Update Manager Accelerated (5-days)

Hardware and Software Engineered to Work Together

ORACLE®