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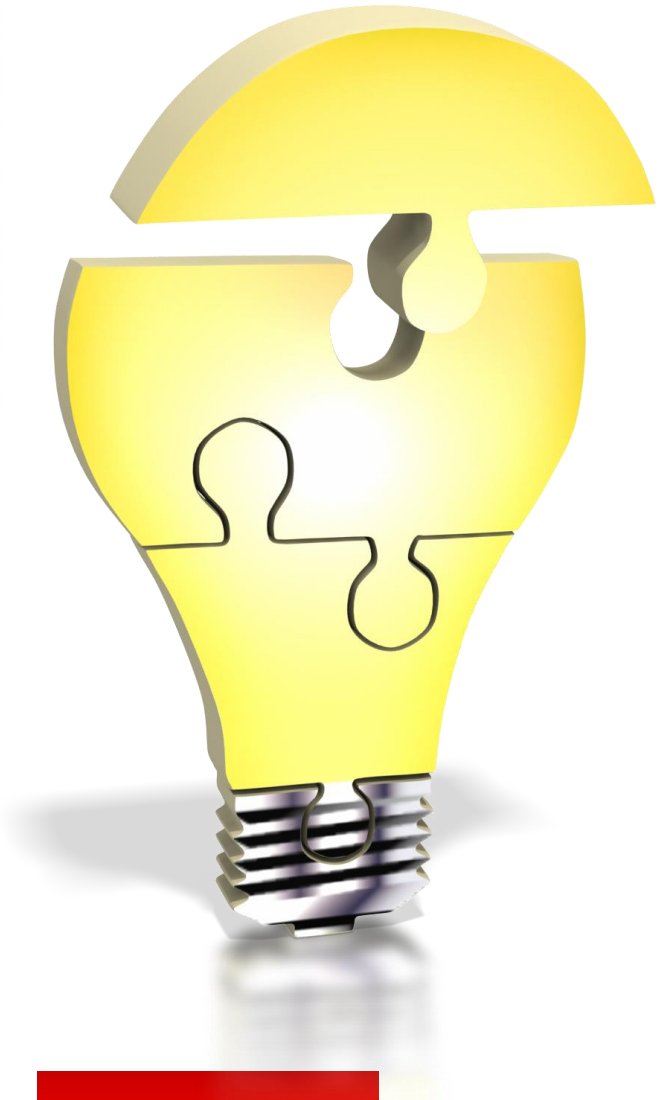
ADS Topics



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

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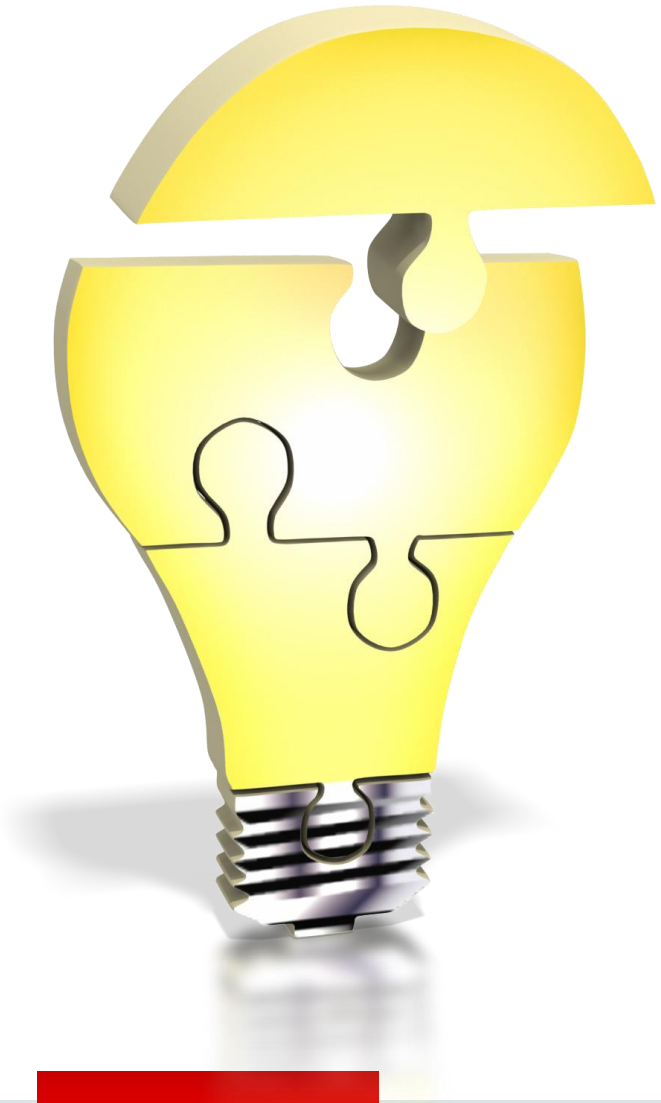
ADS Topics



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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

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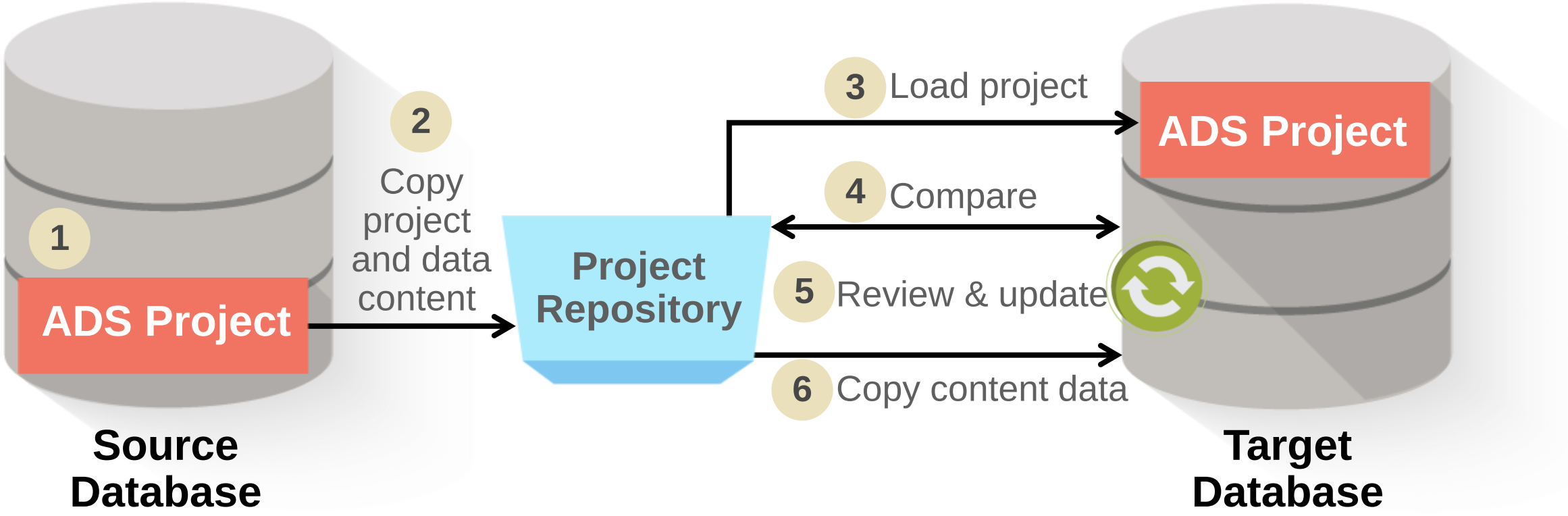
ADS Flow – Data Migration Workbench



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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.

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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.

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ADS is used to Migrate

PeopleTools Examples

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

Application Examples:

- Global Payroll

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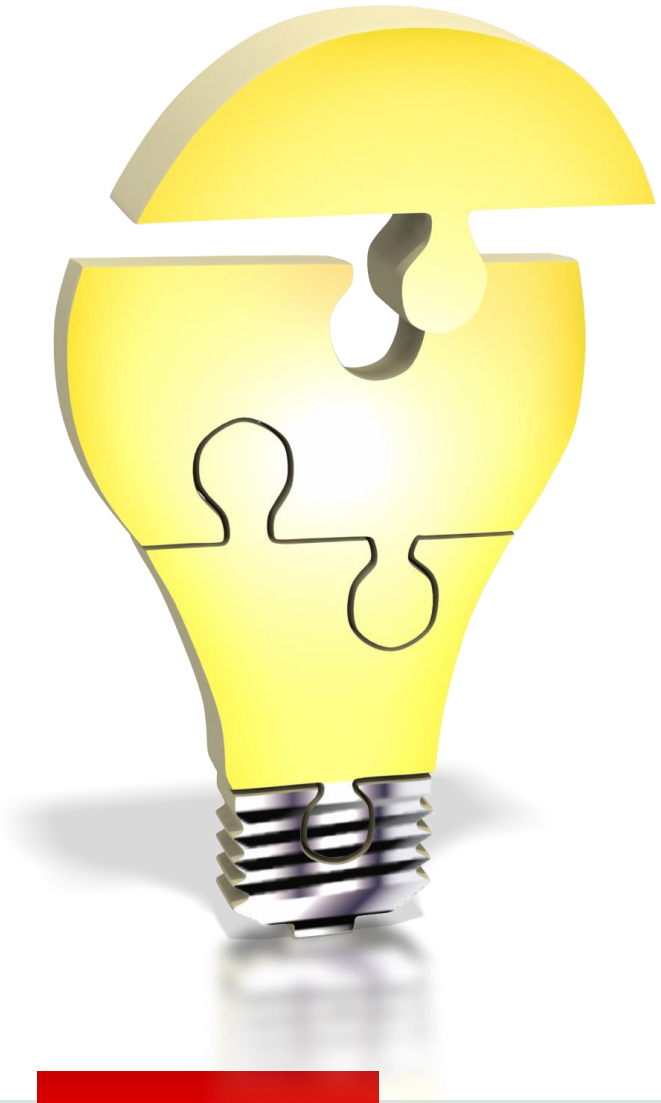
ADS Topics



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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

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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.

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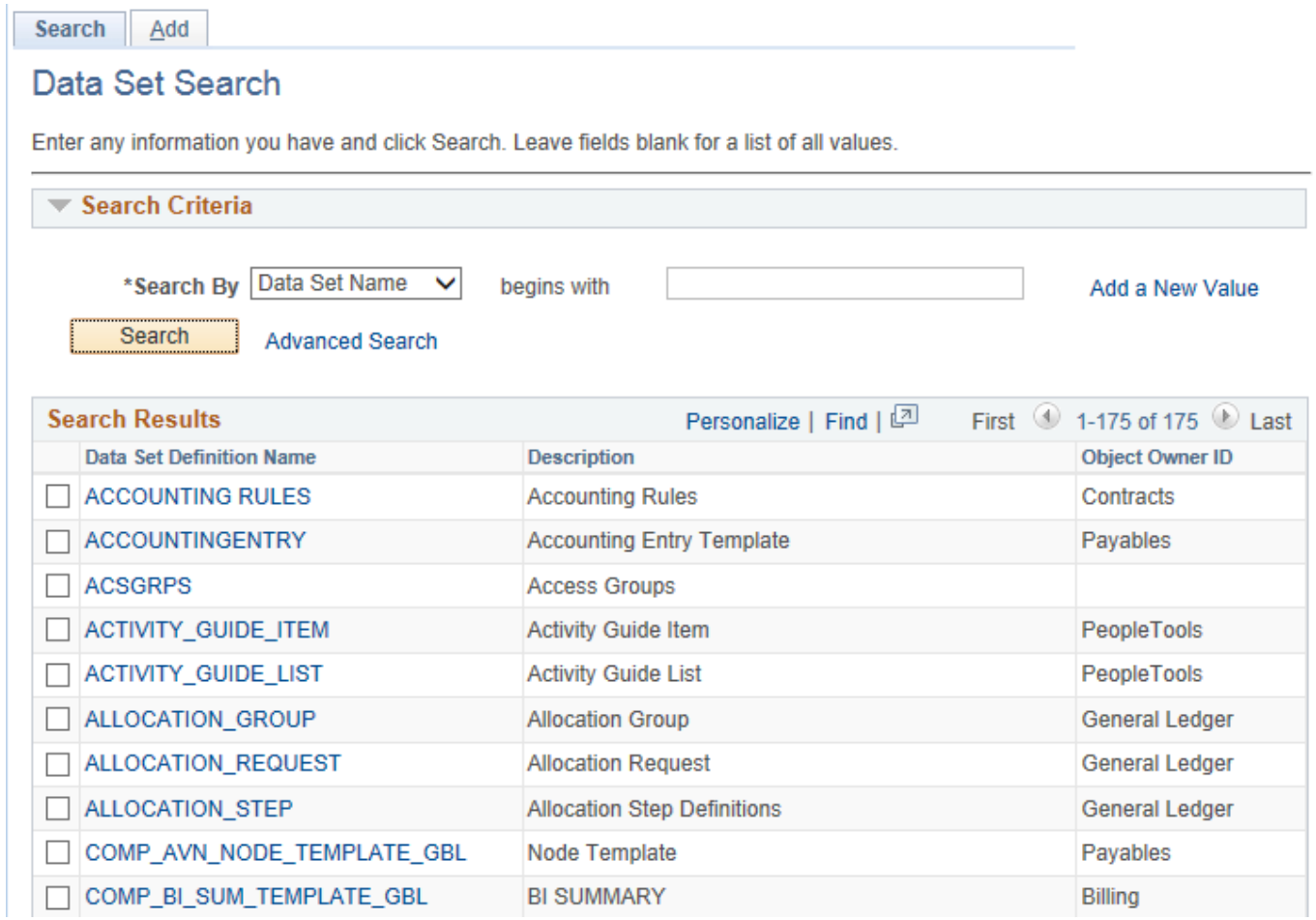
Online Demo: PeopleTools>Lifecycle Tools> Migrate Data>Data Set Designer



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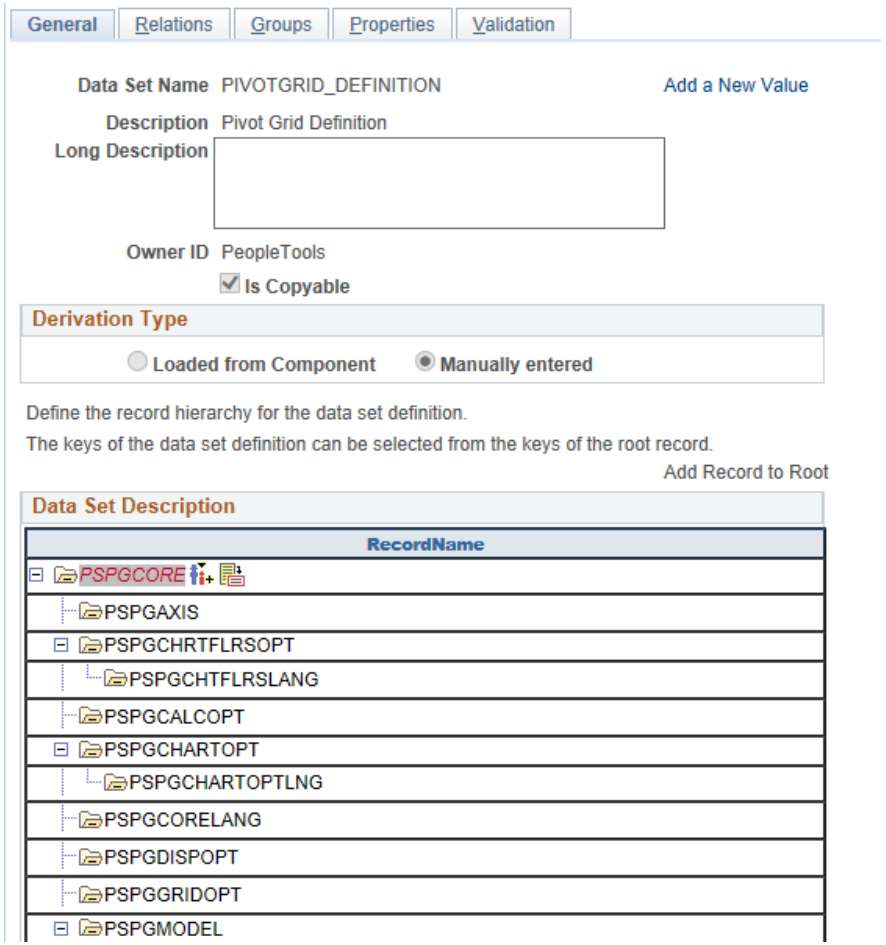
Online Demo: General page

- Example Data Set – Pivot Grid



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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 | 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	☐	PSPTCS_SRVCFG	PORTAL_OBJNAME	☐

Relation Criteria

Personalize | Find | 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

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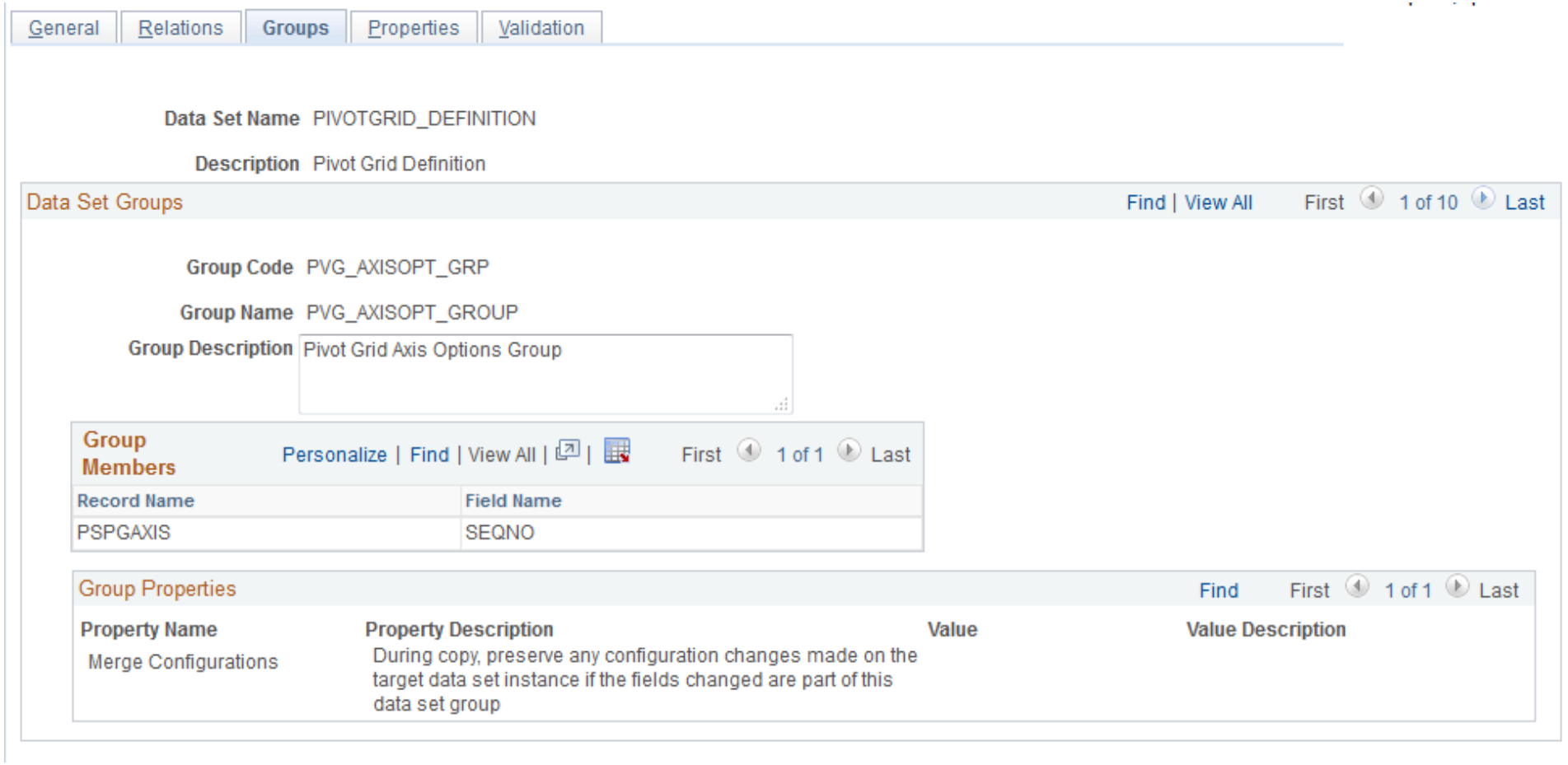
Online Demo: Groups Page



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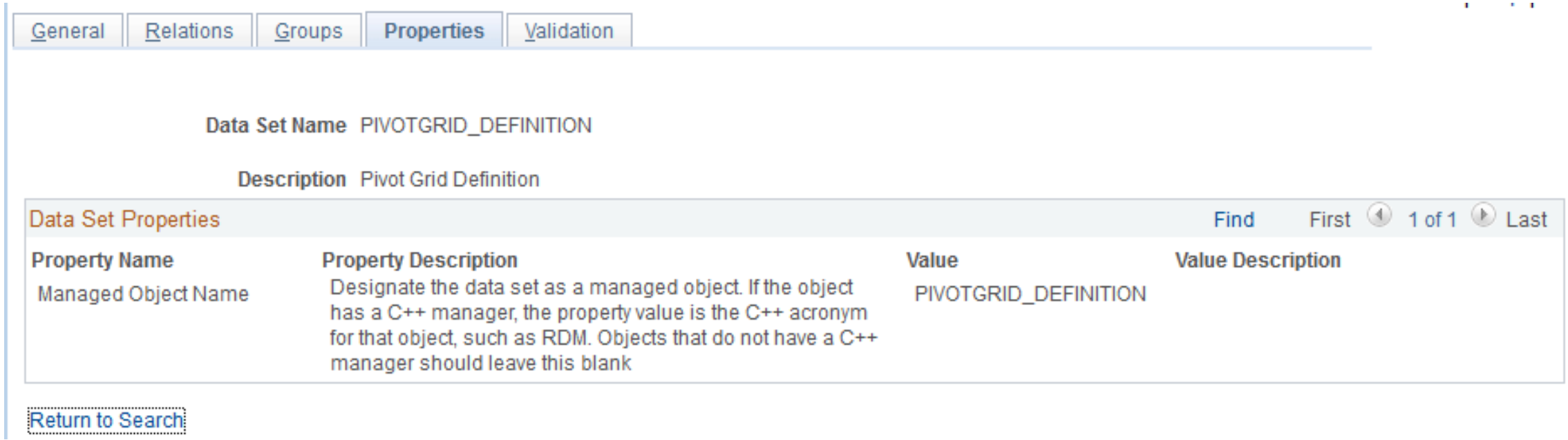
Online Demo: Properties Page



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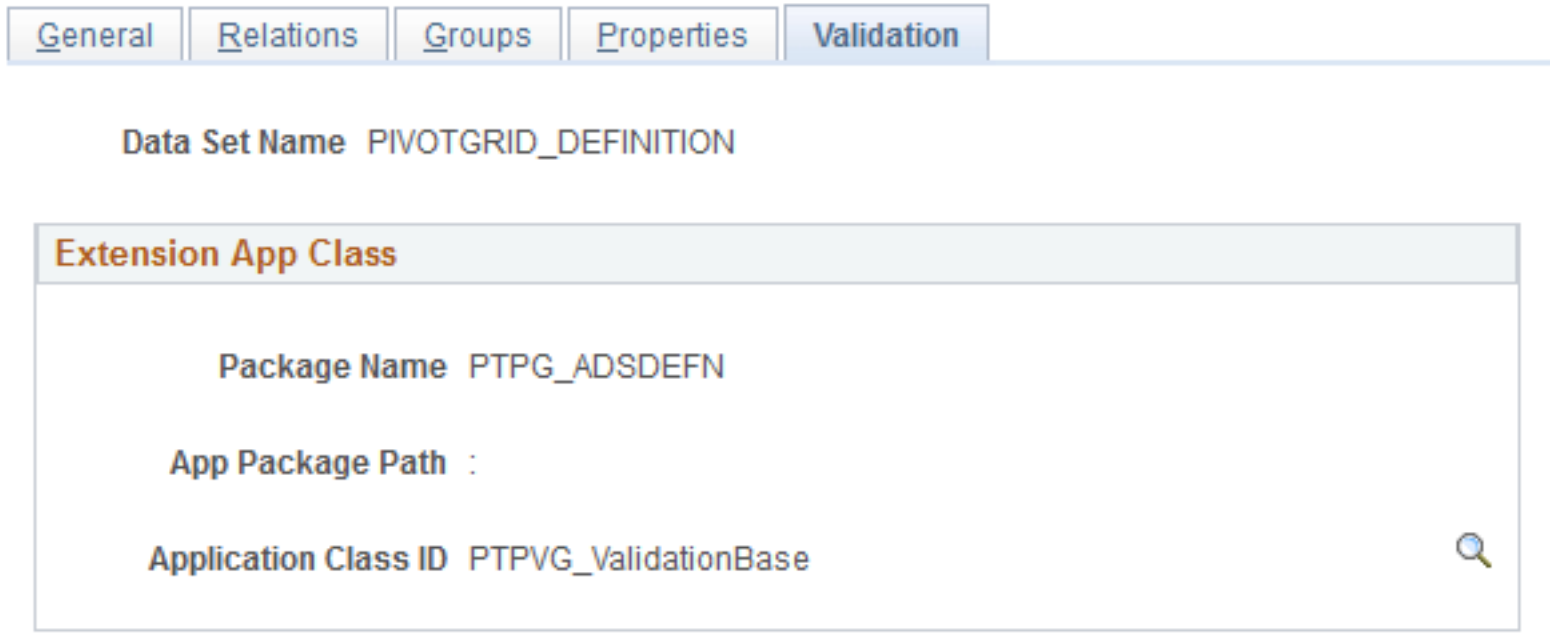
Online Demo: Validation Page



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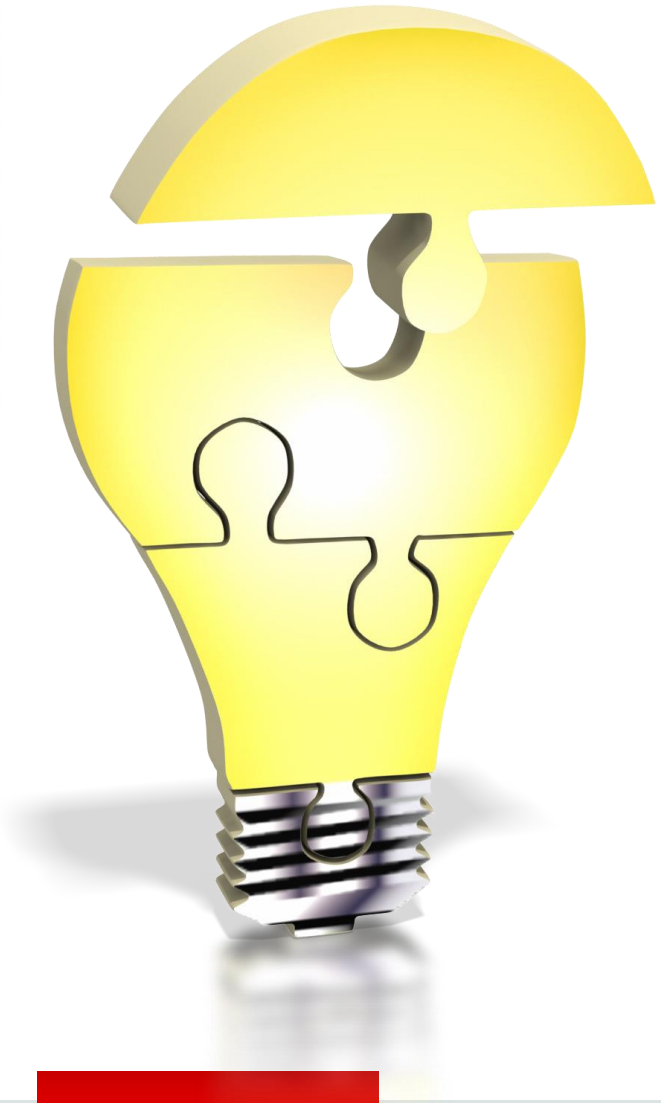
ADS Topics



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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.

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Data Set Instance and Application Data Set Project

Data Set

Data Set Instance

Data Set as a unit of work

ADS Project

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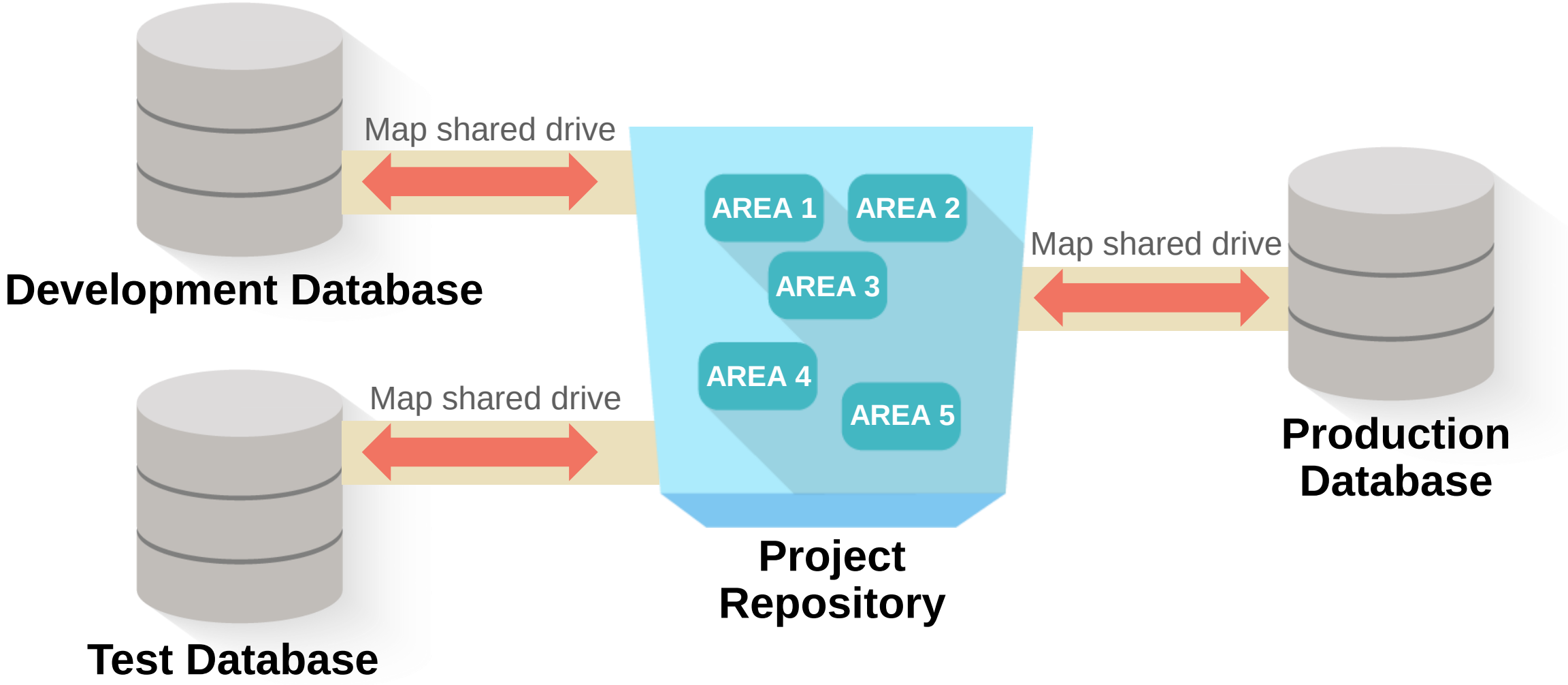
Project Repository



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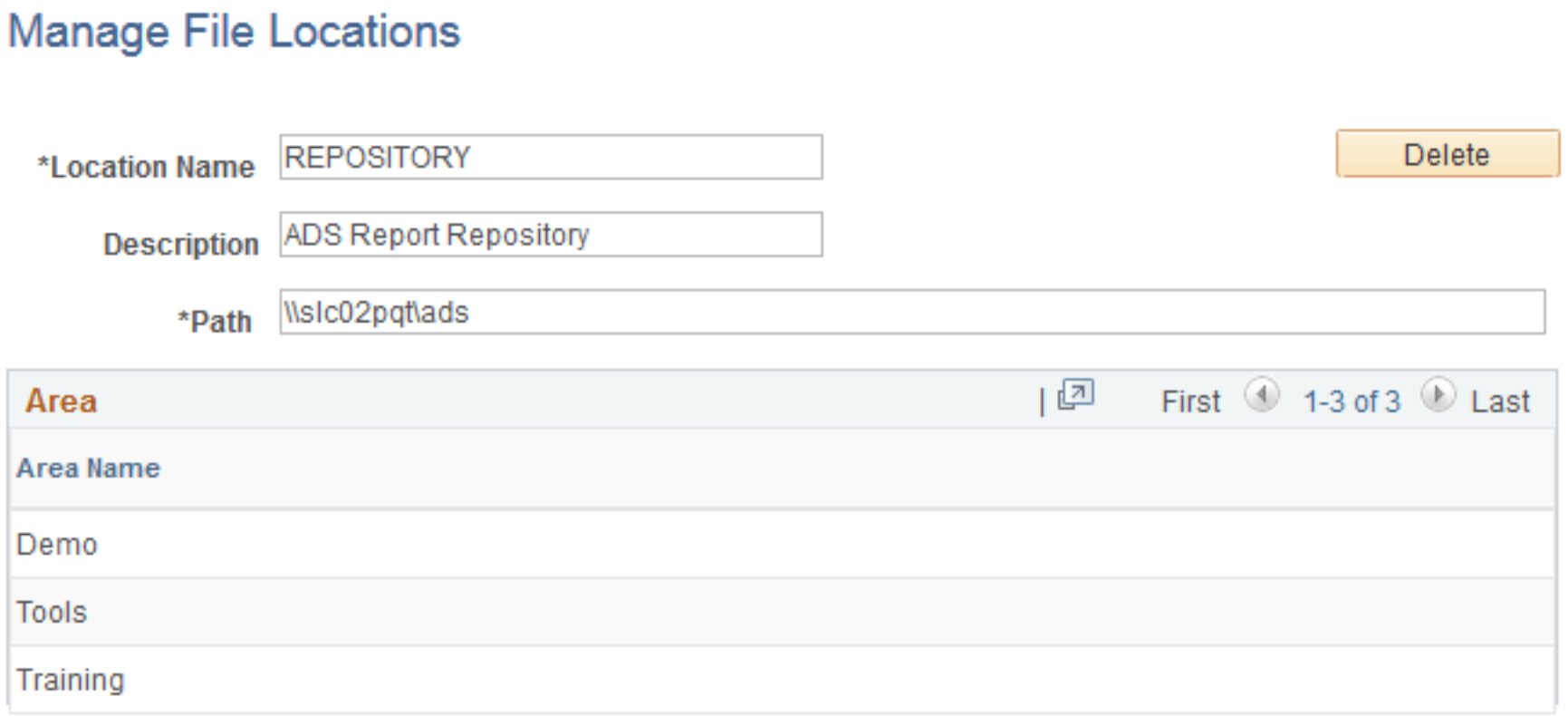
Online Demo: File Locations



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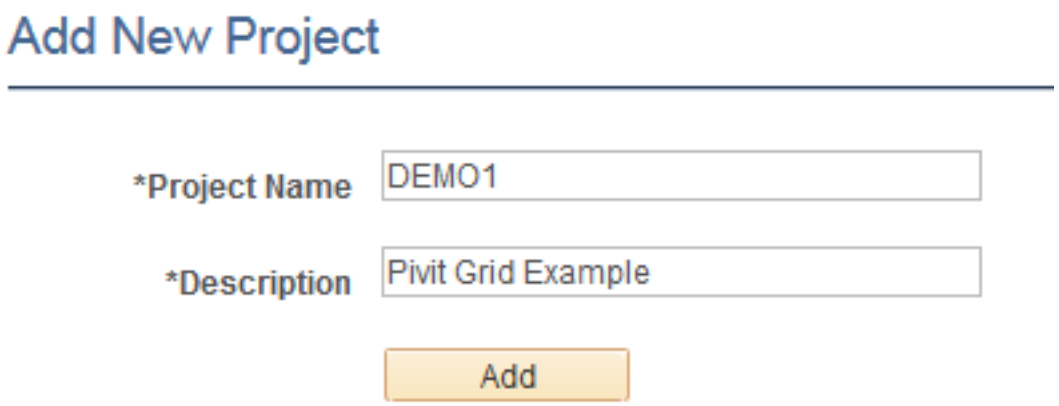
Online Demo: Creating an ADS Project

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



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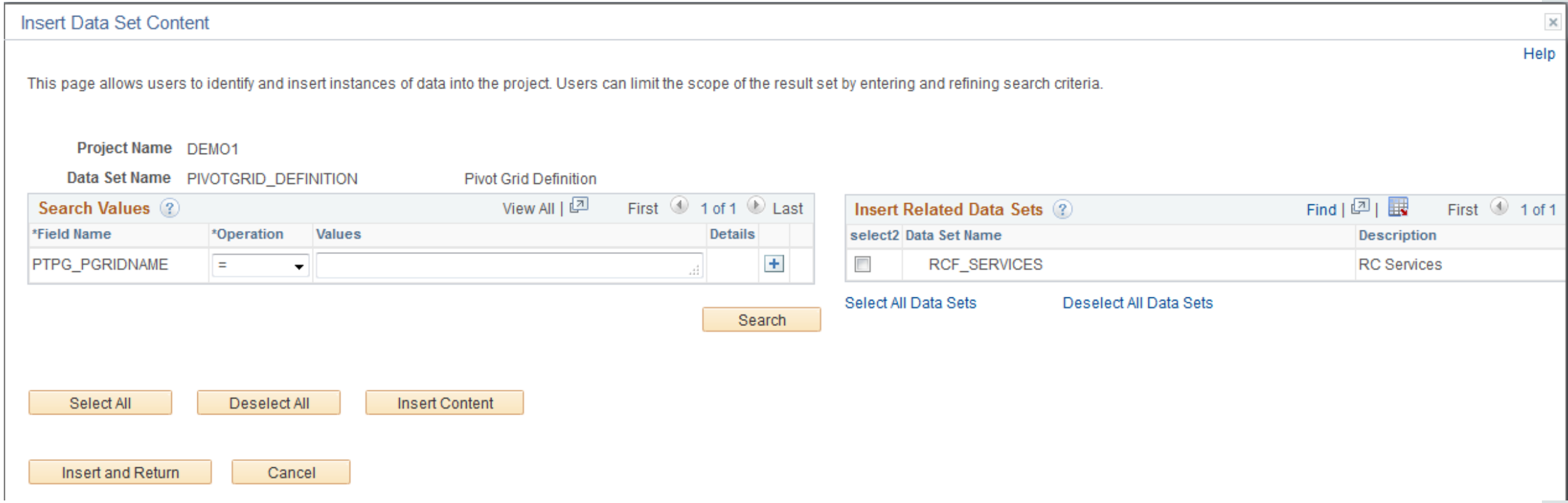
Online Demo: Insert Data Set Content Page



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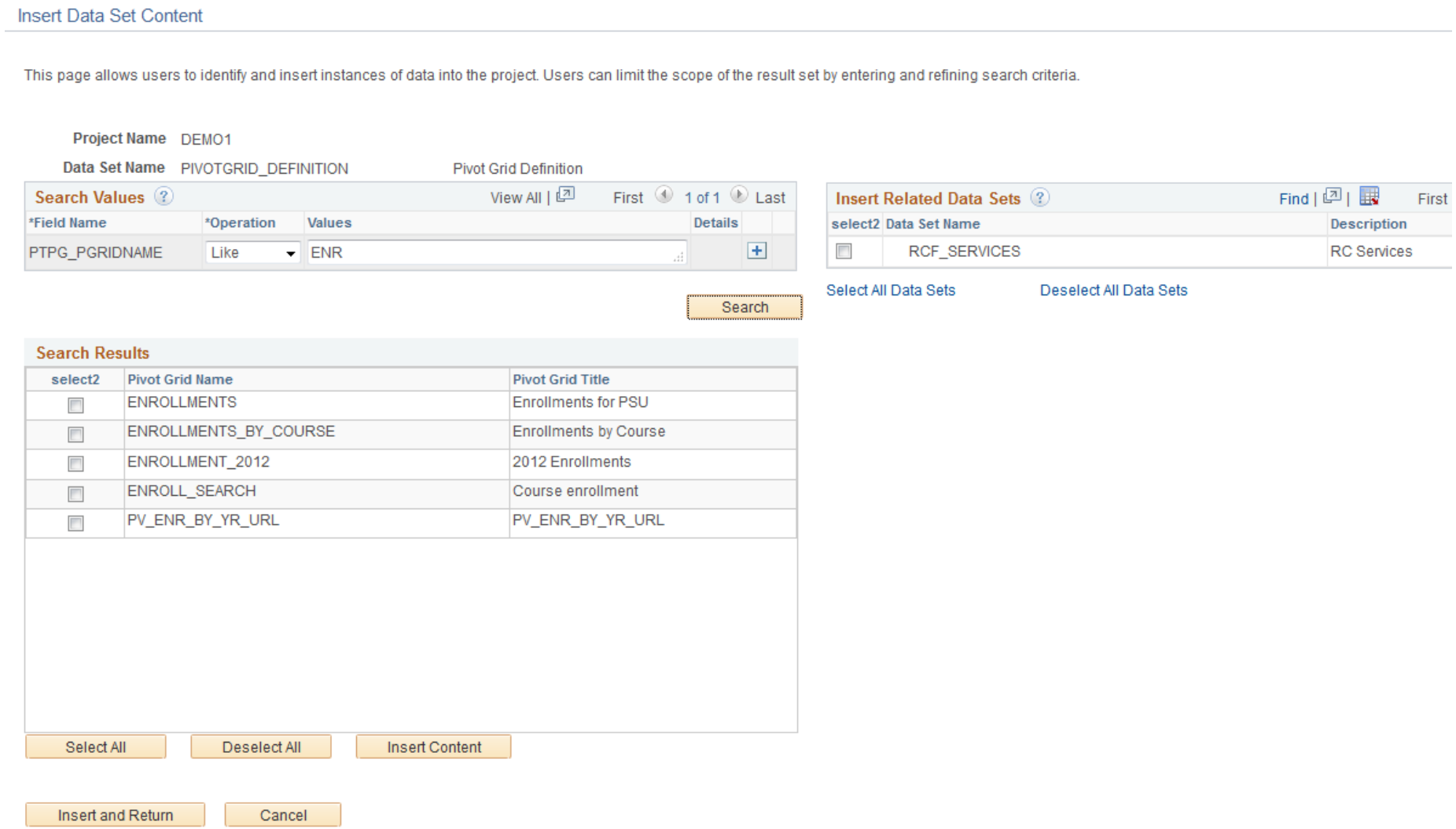
Online Demo: Select Content



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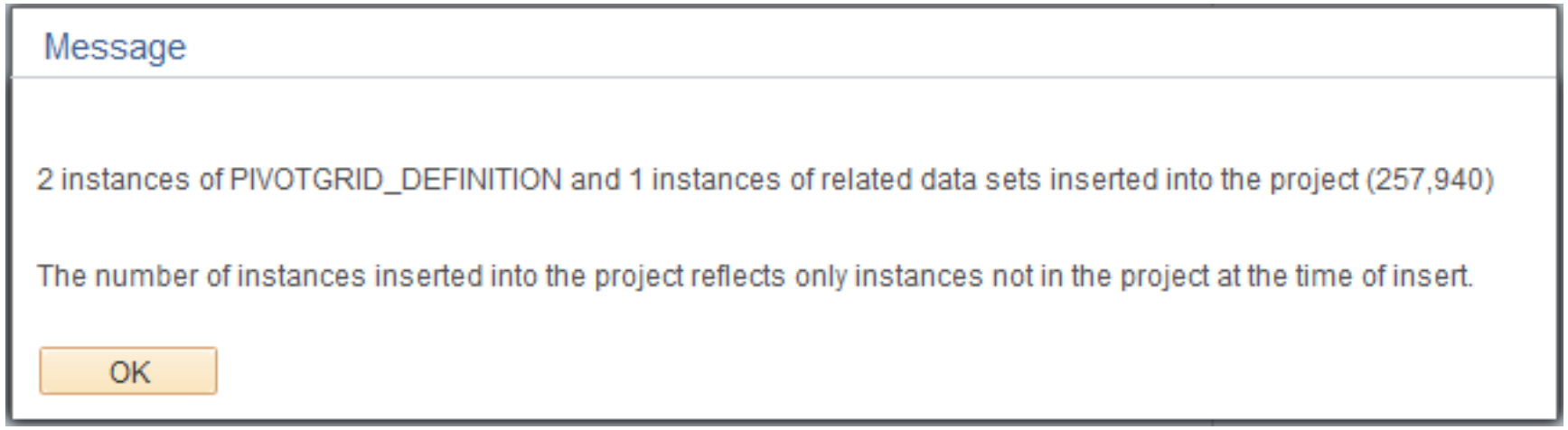
This is not a slide – but the online demo

Message



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Project Name DEMO1

*Description PivotGrid Example

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

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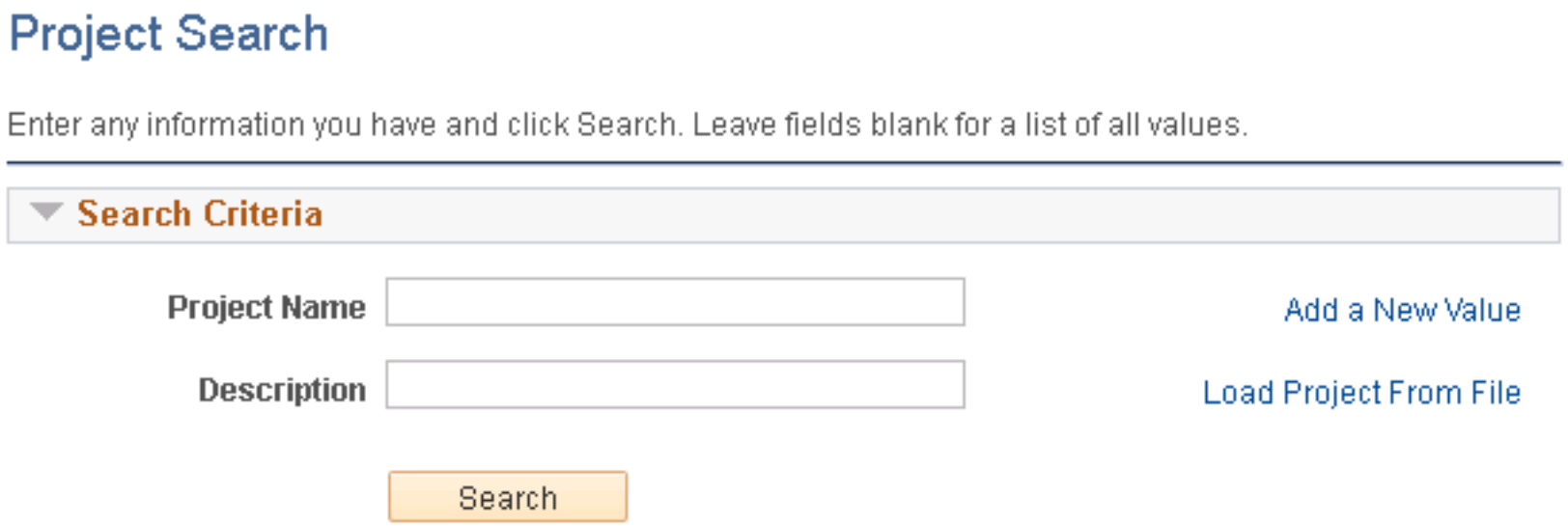
Online Demo: Target Database



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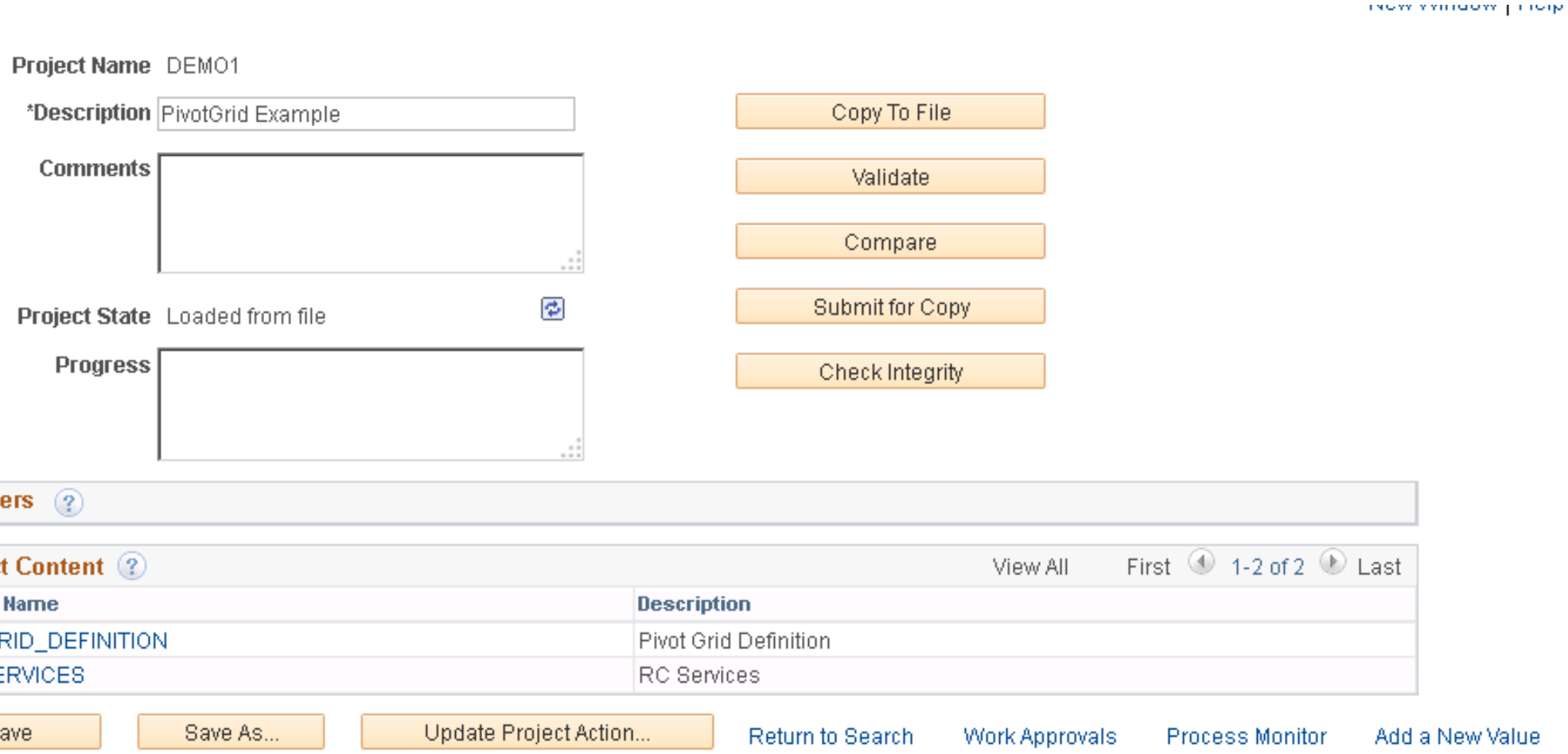
Online Demo: Compare



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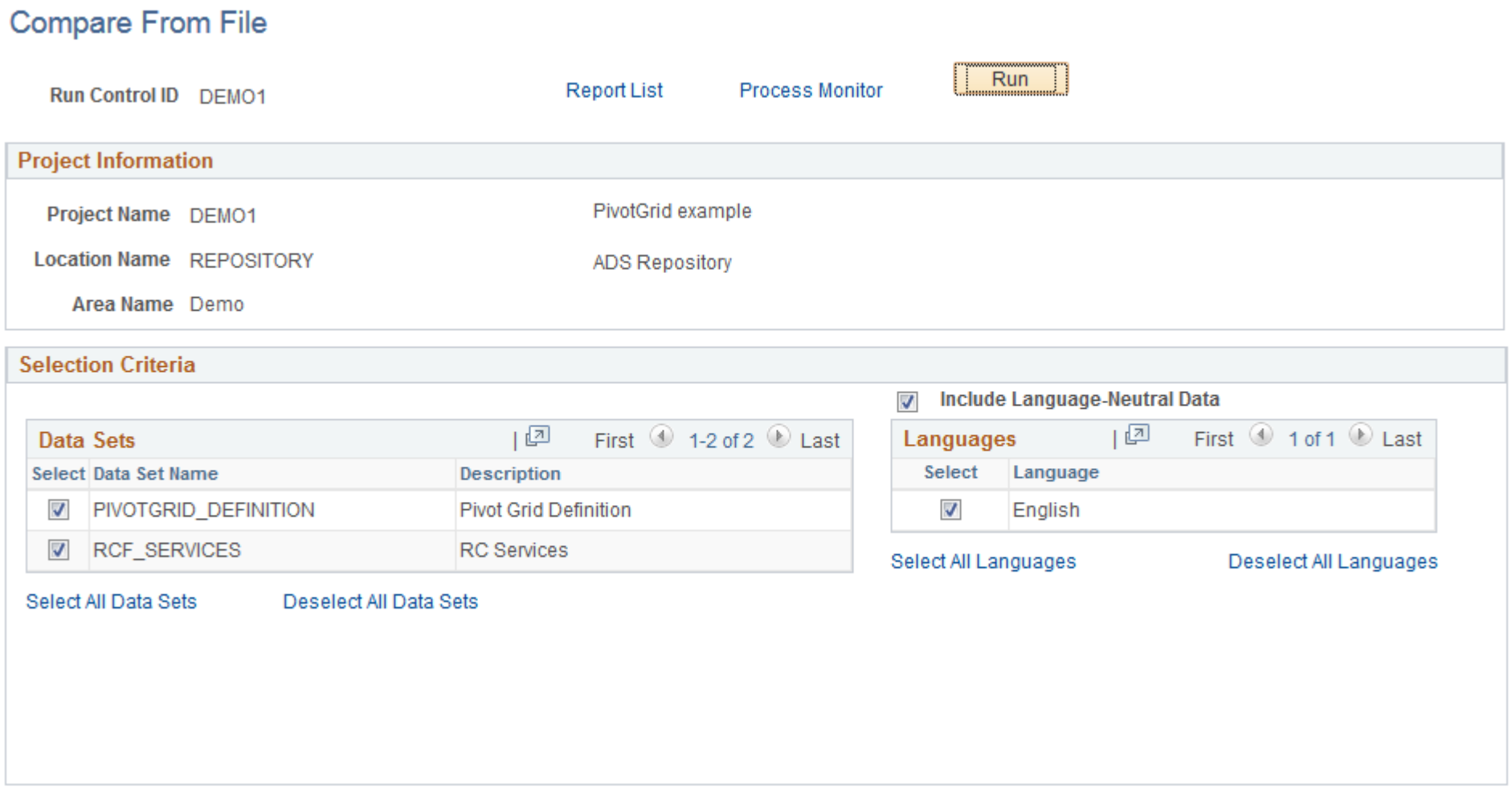
Online Demo: Compare from File Page



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Online Demo: Viewing Compare Reports

Project Name DEMO1

***Description** PivotGrid example

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

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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			
ENROLLMENTS_BY_COURSE	Merge	Addition			

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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 <All>

*Message Severity <All>

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.

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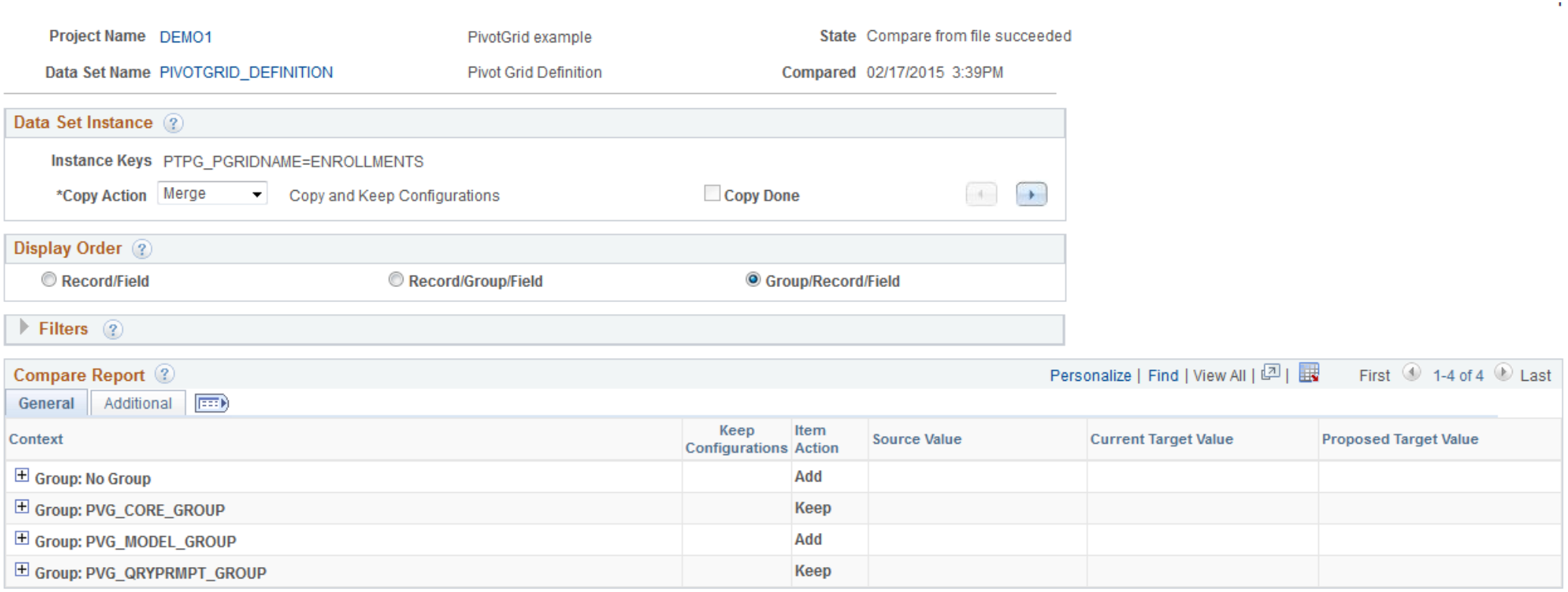
Online Demo: Compare Report Details



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			

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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
Group: No Group		Add			
Group: PVG_CORE_GROUP		Keep			
Group: PVG_MODEL_GROUP		Add			
Group: PVG_QRYPRMPT_GROUP		Keep			

Group: No Group		Add			
Core Pivot Grid Record: ENROLLMENTS		Add			
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

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Online Demo: Expand Records

Compare Report

Personalize | Find | View All | First 1-11 of 11 Last

General | Additional

Context	Keep Configurations	Item Action	Source Value	Current Target Value	Proposed Target Value
Group: No Group		Add			
Core Pivot Grid Record: ENROLLMENTS		Add			
Group: PVG_CORE_GROUP		Keep			
Core Pivot Grid Record: ENROLLMENTS	☑	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
Group: PVG_MODEL_GROUP		Add			
Group: PVG_QRYPRMPT_GROUP		Keep			
Core Pivot Grid Record: ENROLLMENTS		Keep			
Pivot Grid Prompt record: ENROLLMENTS.View, -, BIND3	☑	Keep			
Visible Prompt		Keep	Y	N	N

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Online Demo: PVG_MODEL_GROUP

Group: PVG_MODEL_GROUP		**Add**			
Core Pivot Grid Record: ENROLLMENTS		**Add**			
Pivot Grid Model Record: A.TOOLS_REL	☑	**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			

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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	Configuratic
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	

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Online Demo: PVG_QRYPRMPT_GROUP

Group: PVG_QRYPRMPT_GROUP		**Keep**			
Core Pivot Grid Record: ENROLLMENTS		**Keep**			
Pivot Grid Prompt record: ENROLLMENTS.View, -, BIND3	☑	**Keep**			
Visible Prompt		Keep	Y	N	N

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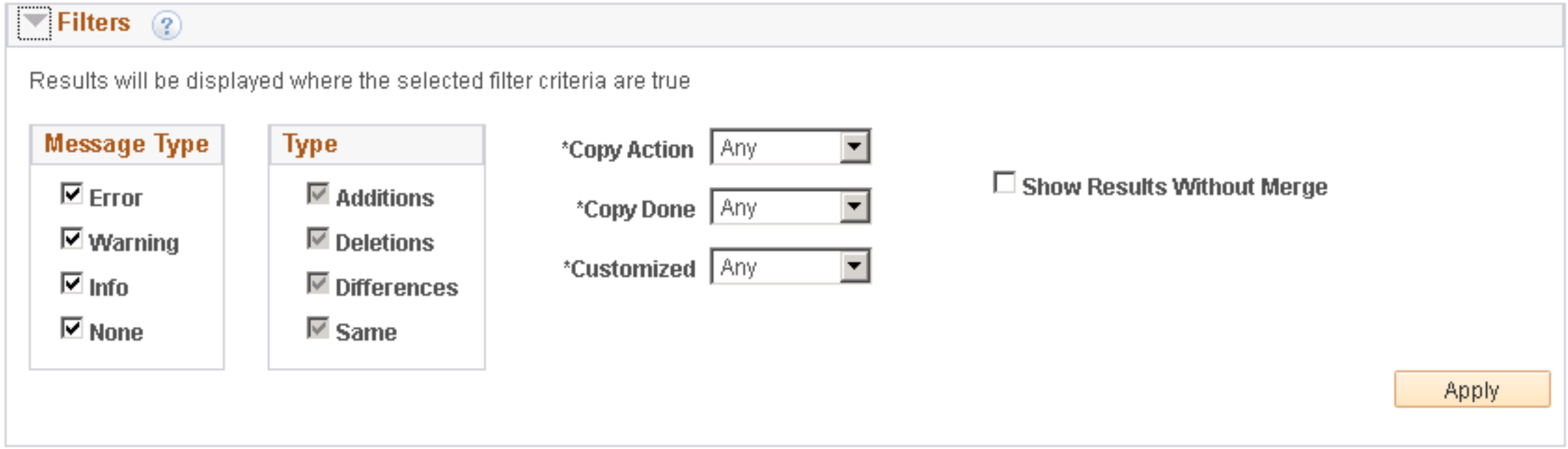
Online Demo: Filters



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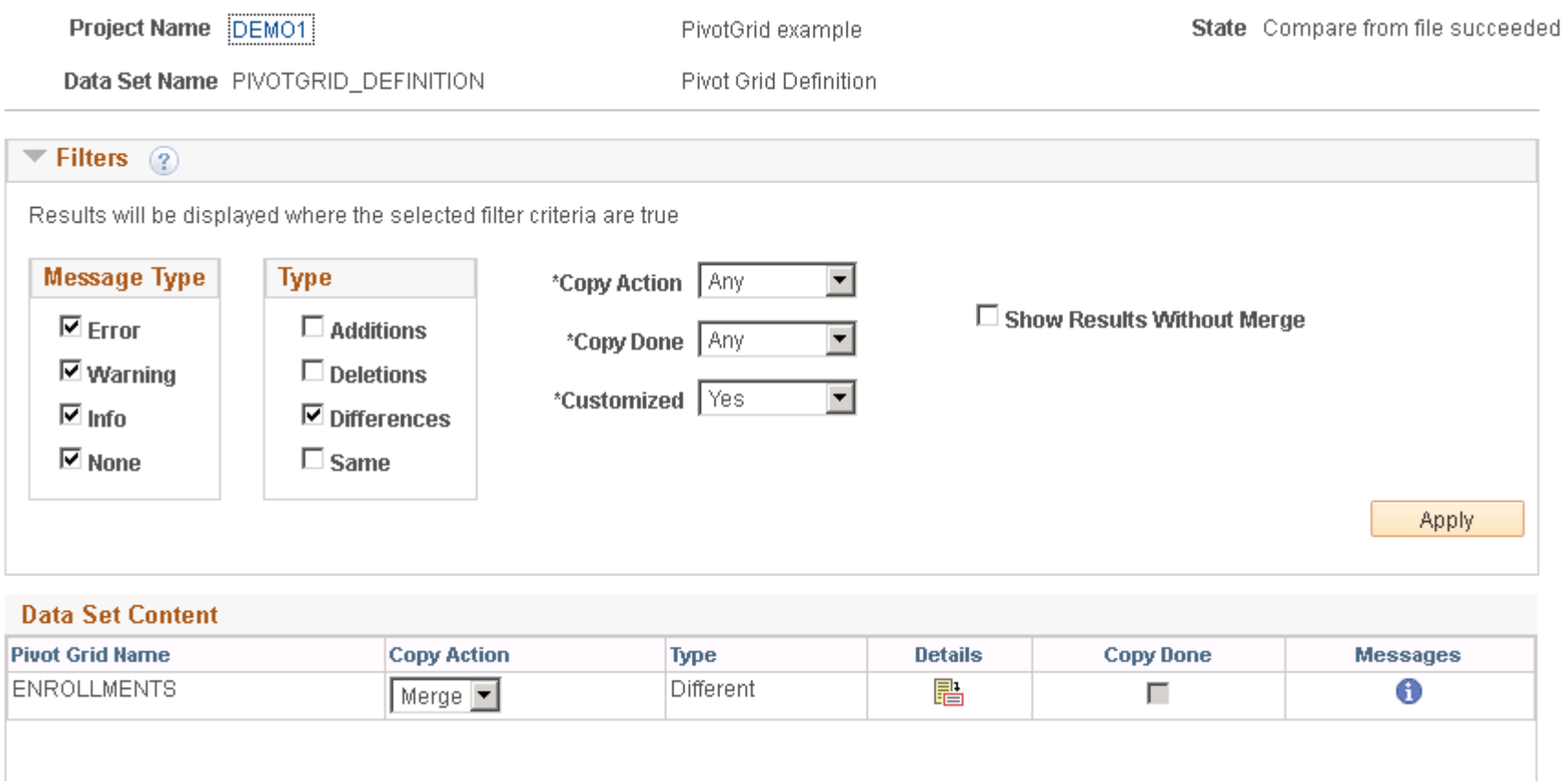
Online Demo: Customized



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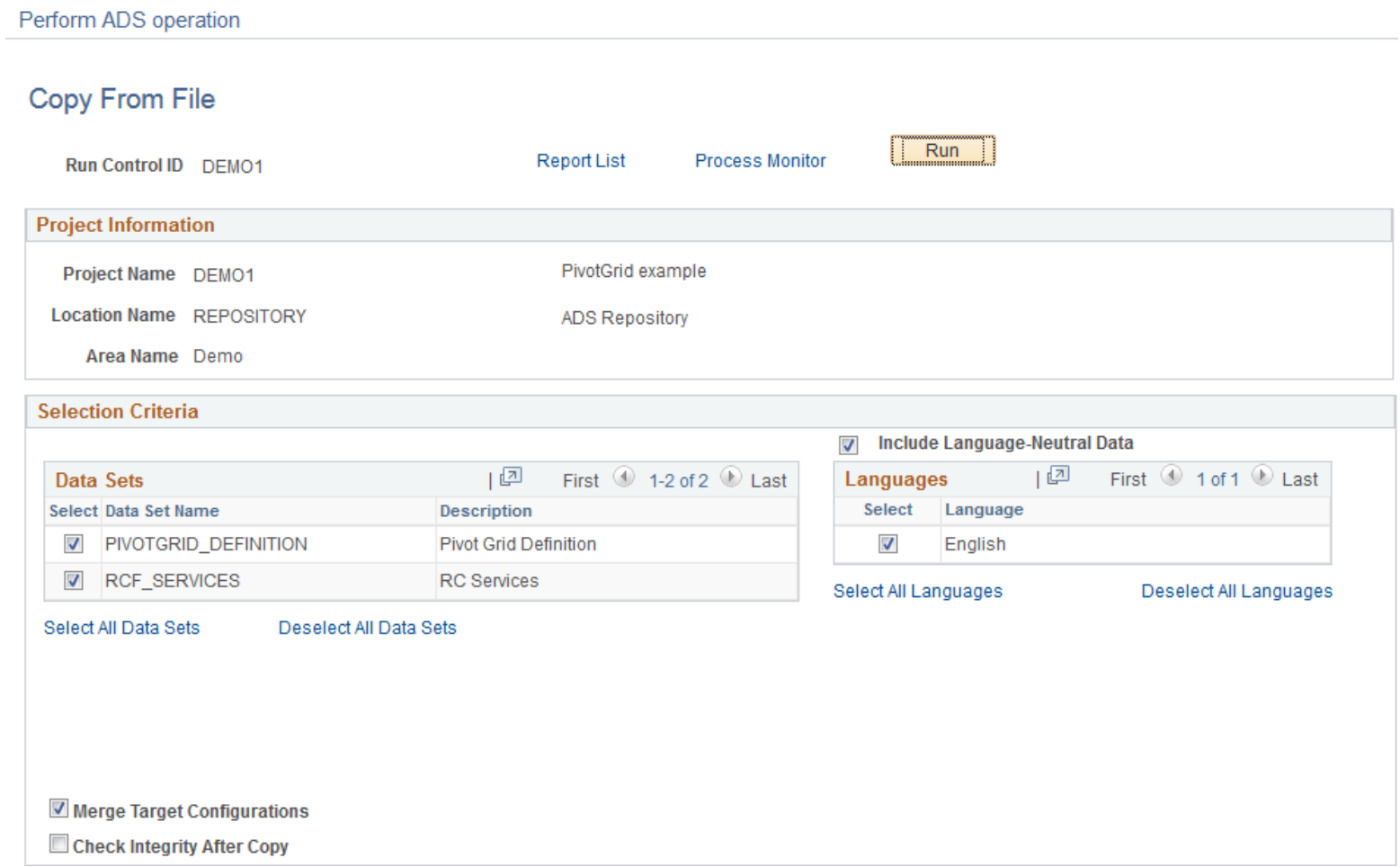
Online Demo: Submit For Copy



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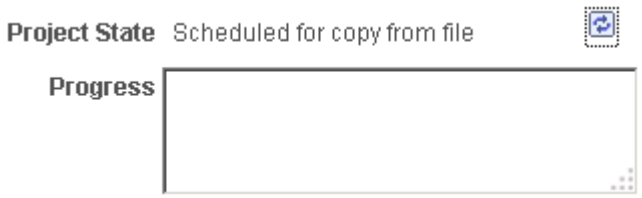

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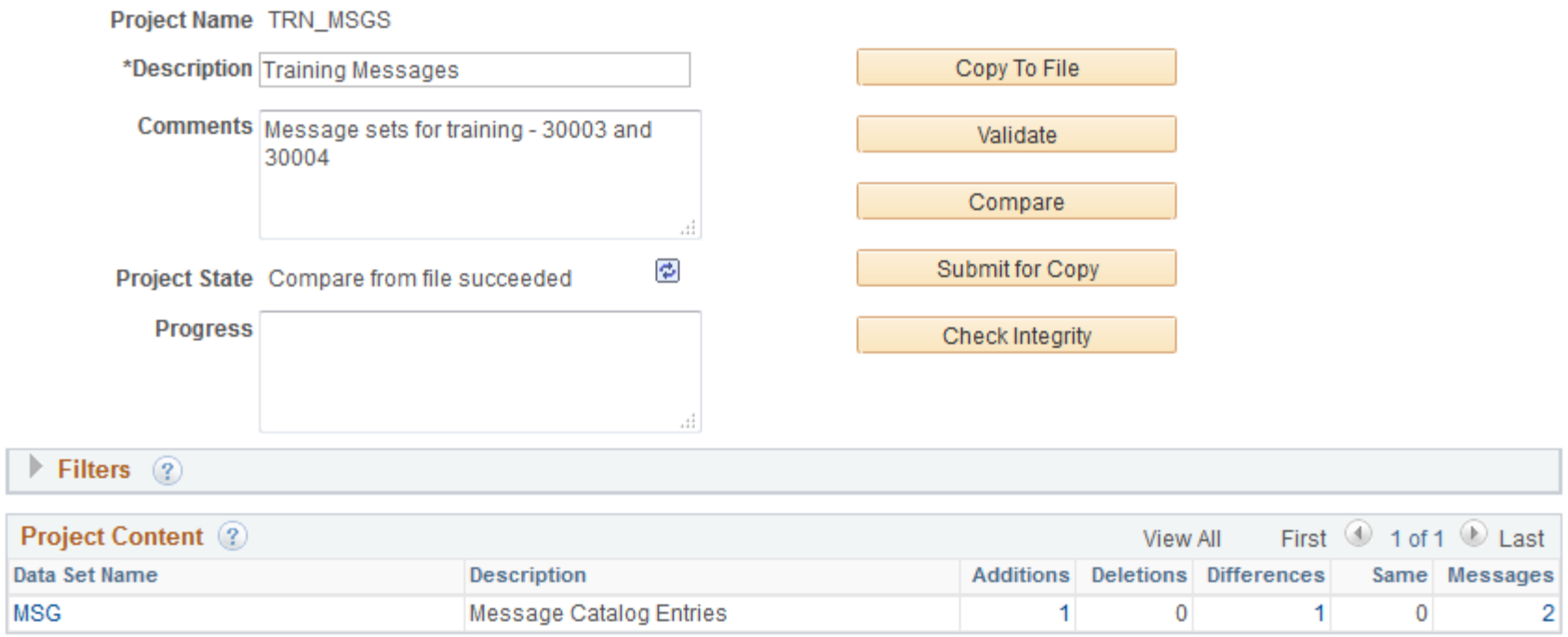
Online Demo: Copy Example



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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			
30004	Copy	Addition			

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Online Demo

Data Set Instance

Instance Keys MESSAGE_SET_NBR=30003

***Copy Action** Copy — Copy from Source — **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

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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 — 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**		

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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

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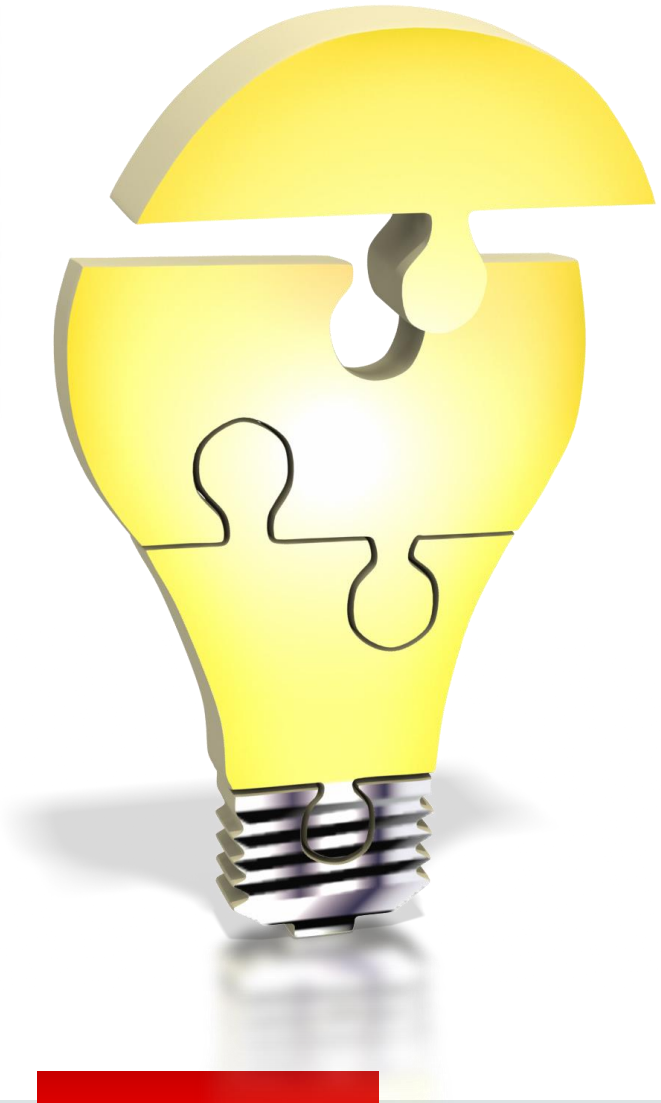
ADS Topics



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

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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

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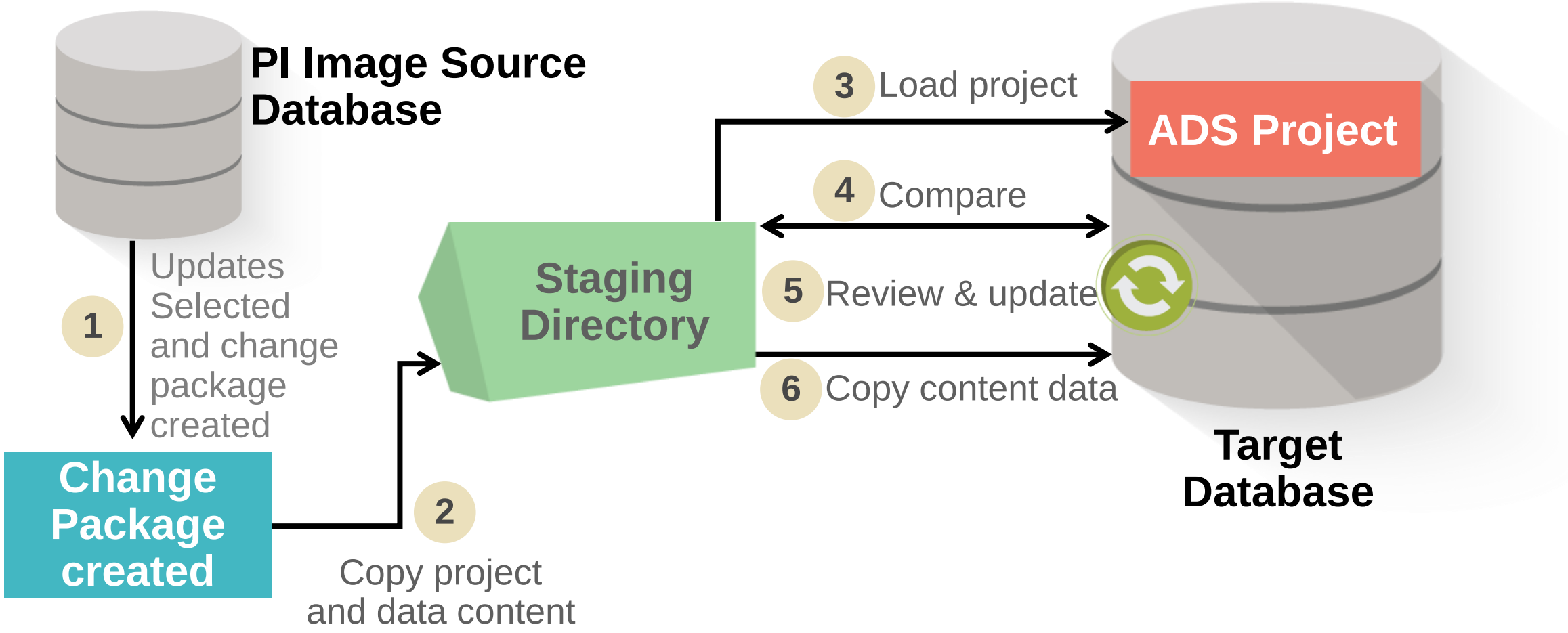
ADS Flow In PUM



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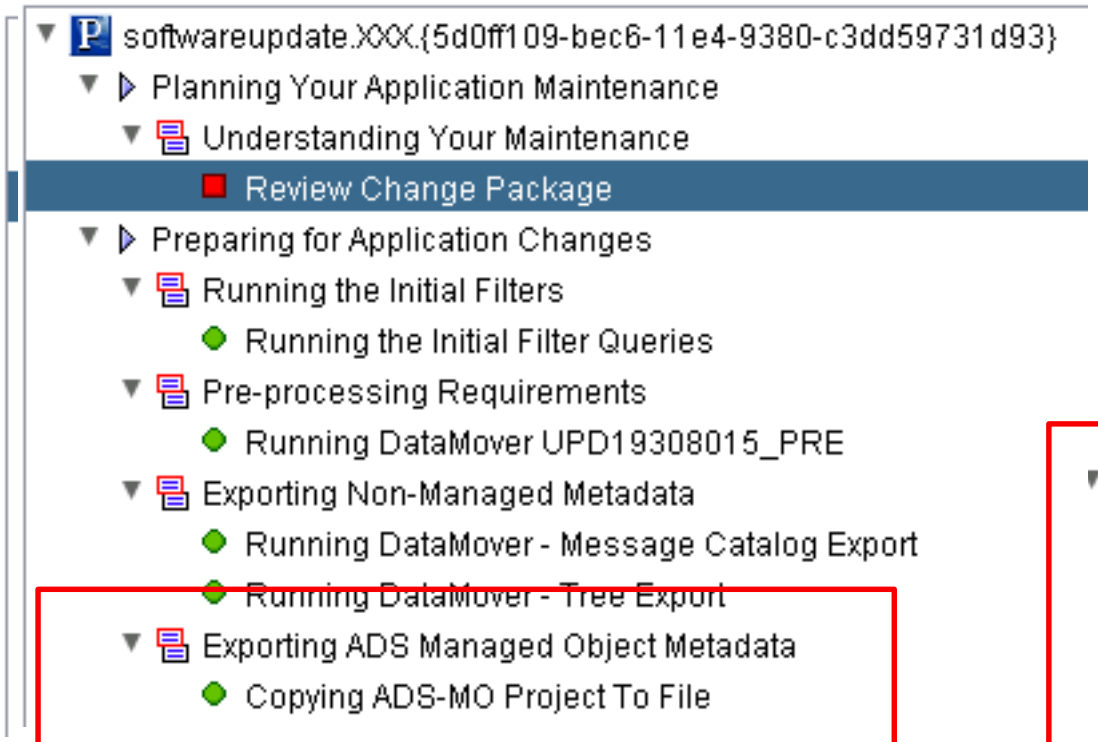
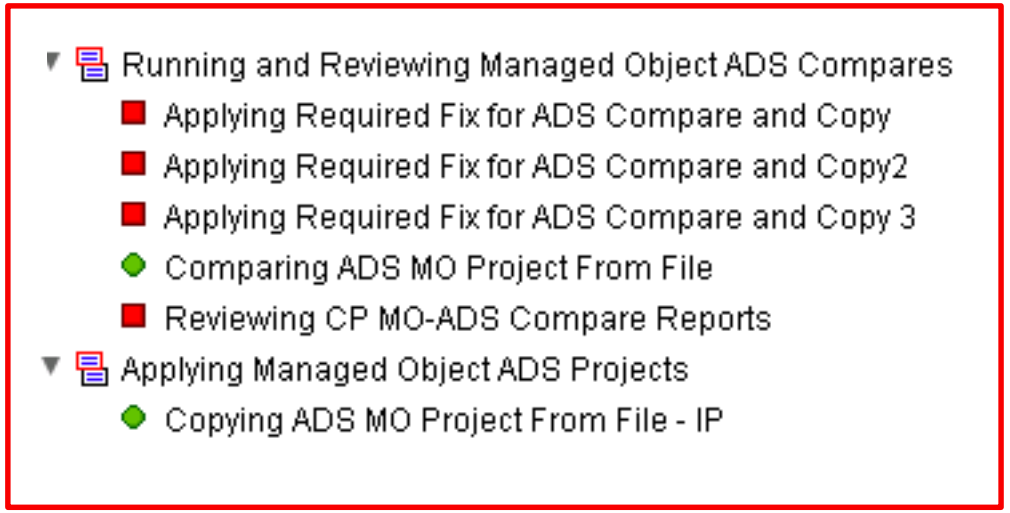
Online Demo





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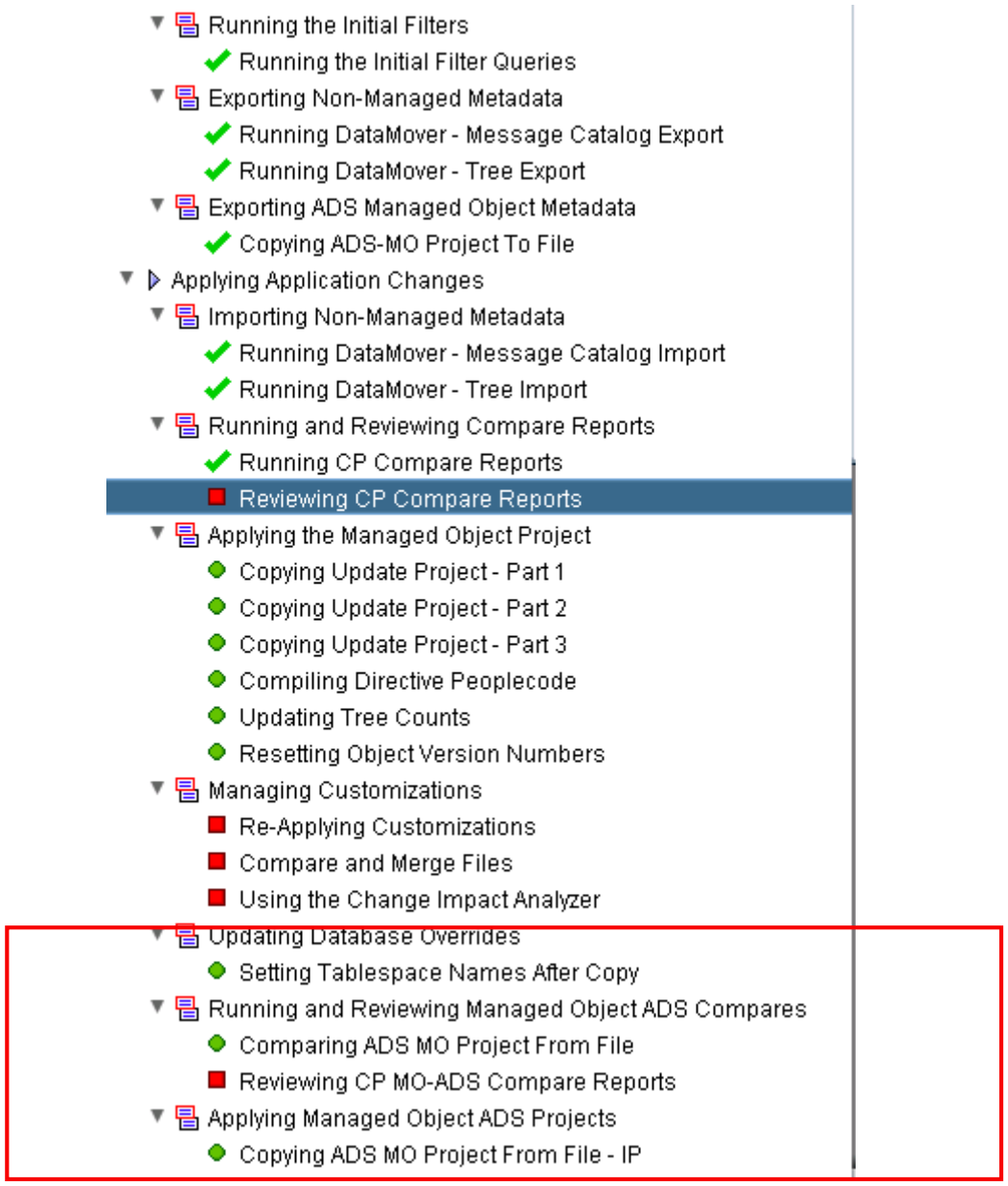
Online Demo



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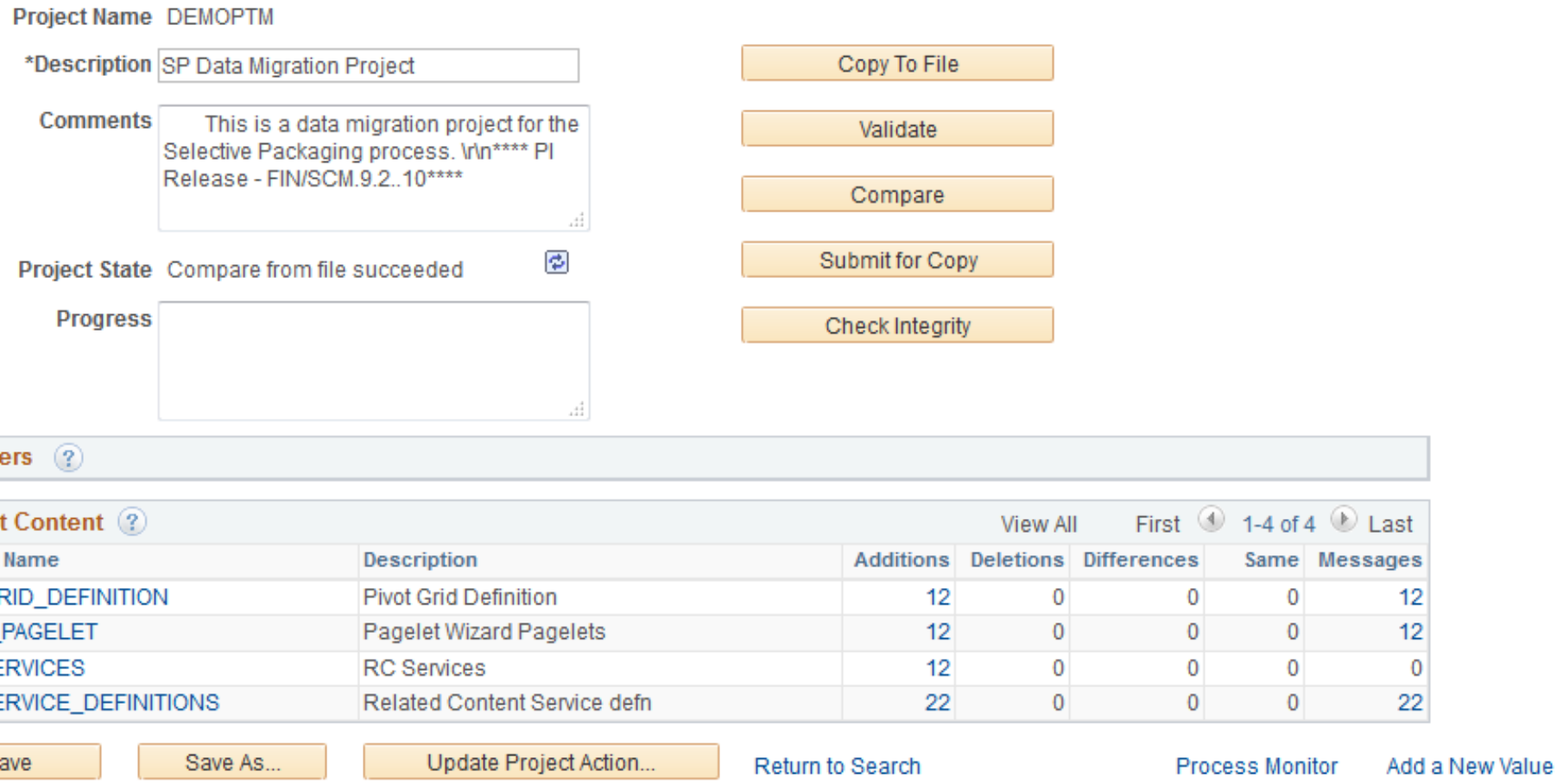
Online Demo: Reviewing Report



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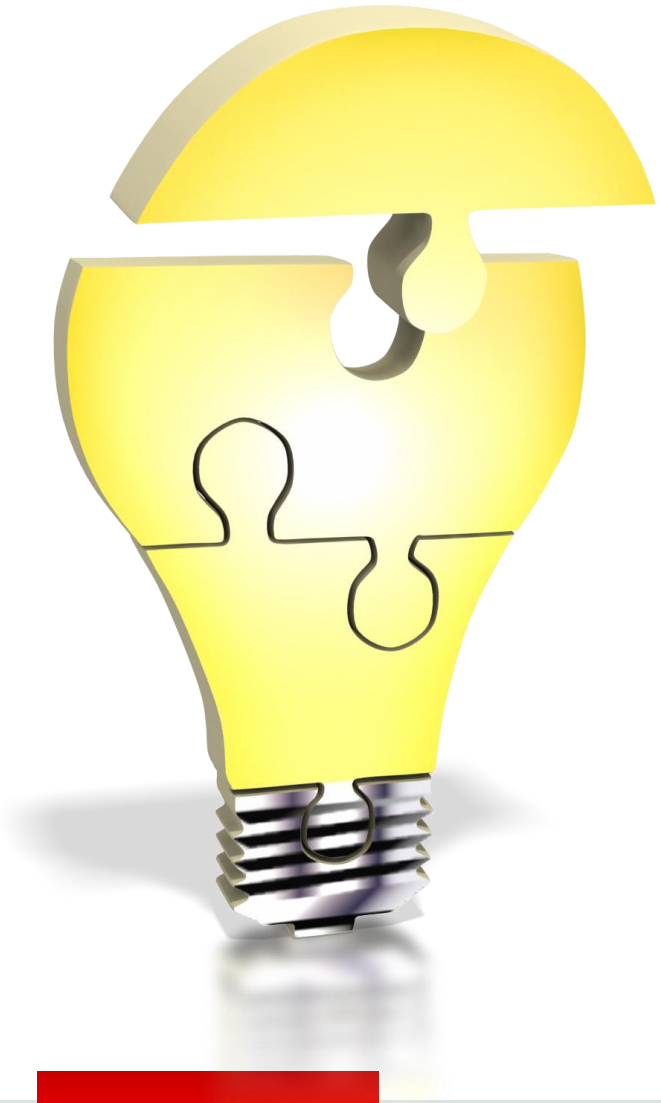
ADS Topics



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PeopleSoft Roles

- PeopleSoft data owners

  Create data set definitions

- PeopleSoft development

  Incorporate ADS projects in updates delivered in PUM

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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.

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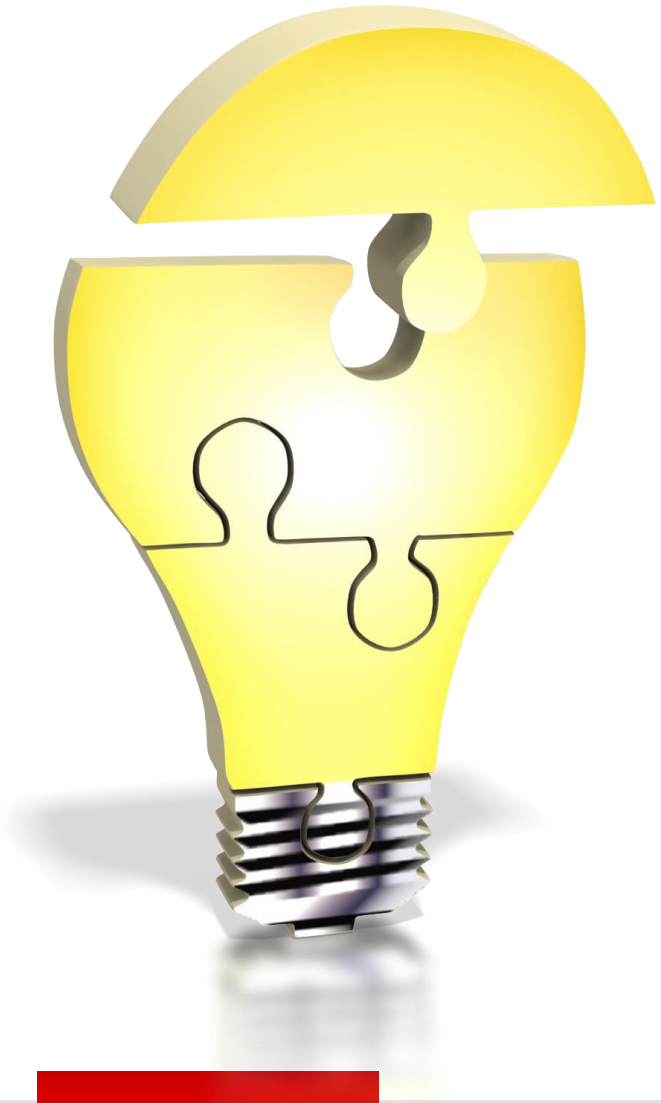
ADS Topics



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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)

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Engineered to Work Together

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