



**PEOPLESOFT HUMAN RESOURCE
MANAGEMENT SYSTEMS 8.9
MAINTENANCE PACK 3 CUMULATIVE**

PeopleSoft Human Resource Management Systems 8.9 Maintenance Pack 3 Cumulative

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PEOPLESOFT MAINTENANCE PACK INSTALLATION INSTRUCTIONS

This document provides instructions to do manual Application updates. The tasks in this document are in addition to the tasks in Change Assistant and must be completed in order to complete the installation of this Maintenance Pack.

Task Overview

The following table outlines the tasks in this document:

Task No.	Task Name
Task X-1	Updating Security
Task X-2	Performing Post-Update Conversion Tasks
Task X-3	Performing Additional Update Activities

Task X-1: Updating Security

This section discusses the following:

- Updating Security Permission Lists
- PeopleSoft Pay Bill – Creating a new Role
- Updating Web Libraries Permission

Updating Security Permission Lists

This section discusses the following:

- Updating Security Permission Lists to Grant Full Access
- Identifying Menu and Component Combinations for Maintenance Pack

Updating Security Permission Lists to Grant Full Access

Update security permission lists to grant full access for the new objects listed in the table below. The example value in the following procedure is relevant to this Maintenance Pack.

Note. Perform this security change for all listed Permission Lists. Add any menu or component name that does not already exist. If a permission list is not given then complete the step for the permission list applicable to your environment.

To update security permission lists:

Select **PeopleTools, Security, Permission & Roles, Permission Lists.**

Select permission list *HCCPGPDEU*

Select the Pages page.

Click **Edit Components** for the menu **GPDE_MAINTAIN_PAYROLL_DATA.**

Click **Edit Pages** for Component **GPDE_LN_SETUP**

Click **Select All** (make sure the **Authorized** box becomes selected) and then click **OK.**

Click **OK.**

Click **SAVE.**

Repeat the above steps for the permission list, menu and component combination in the table below. Add any menu or component name that does not already exist. If a permission list is not given then complete the step for the permission list applicable to your environment.

Identifying Menu and Component Combinations for Maintenance Pack

For this Maintenance Pack, update security permission lists for the following menu and component combinations:

Permission List	Menu Name	Component Name
HCCPPY1000	ROLE_EMPLOYEE	PY_IC_W2_WRKLIST PY_IC_W4
HCCPPY1000	MANAGE_PAYROLL_PROCESS_US	RUN_MASS_EE_UPD2
HCCPFGALLP	MANAGE_PAYROLL_PROCESS_(USF)	RUN_MASS_EE_UPD2
HCCPCSSA1000	SA_LEARNER_SERVICES	SFA_SS_EMPN SFA_SS_EMPN_VIEW
HCCPCSSA1010	SA_LEARNER_SERVICES	SFA_SS_EMPN SFA_SS_EMPN_VIEW
HCCPCSSA1000	AV_OUTREACH	AV_OUTR_ACTN

Permission List	Menu Name	Component Name
		AV_OUTR_RSLT
HCCPCSSA1000	CALCULATE_TUITION_AND_FEES	SSF_ANZ_LOAN_DEFLT SSF_RUNCTL_CAN SSF_RUN_SFPBFHLP SSF_STDNT_LN_ANZ SSF_STDNT_LN_OS
HCCPCSSA1000	DESIGN_FINANCIAL_AID1	BDGT_REGION_TABLE
HCCPCSSA1000	FINANCIAL_AID_HISTORY	DL_EC_ORIG_04 DL_EC_ORGACK_04 DL_EC_CHG_04 DL_EC_CHGACK_04 DL_EC_DSB_04 DL_EC_DSBACK_04 DL_EC_PNTACK_04 DL_EC_CRDACK_04
HCCPCSSA1000	PACKAGE_AID	SFA_RUNCTL_FISAP07
HCCPCSSA1000	PROCESS_LOANS	SFA_PERK_MPN_TRACK SFA_PERK_MPN_SETUP SFA_RUN_PERK_MPN DL_EC_DLSAS_06 SFA_CRC_CERT_RQ SFA_CRC_SRCHMCH SFA_CRC_903_RPT SFA_CRC_907_RPT SFA_CRC_9071_RPT SFA_PERK_MPN_INDEB
HCCPCSSA1000	SAD_NCEA_NZL	Give Full Access for All Components
HCCPCSSA1000	MANAGE_ACADEMIC_RECORDS	SSR_CLS_STATUS STDNT_ACTIVATION
HCCPCSSA1000	PROCESS_APPLICATIONS	SCC_CHESSN_AUS
HCCPCSSA1000	SSR_GOVT_REPORTING_AUS	SSR_COHORT_YR_AUS SSR_HECS_BAND_AUS

Permission List	Menu Name	Component Name
		SSR_HECS_MAP_TO SSR_WRK_EXP_MAP SSR_DEST_SETUP SSR_DEST_WRK_HDR SSR_DEST_RC_WT SSR_RC_DEST1 SSR_RC_DEST2
HCCPCSSA1000	MAINTAIN_FOREIGN_NATIONALS	I20_FORM DS2019_FORM SEV_EVENT_TYPE
HCCPCSSA1000	LOAD_EXTERNAL_DATA	SAD_AMC_ETHNIC_MAP
HCCPCSSA1000	SAD_TAC_PROCESSING	Give Full Access for All Components
HCCPGPDEU Note: For GP Germany customers only.	GPDE_DEFINE_PAYROLL_SETUP GPDE_MANAGE_PAYROLL_PROCESS GPDE_MAINTAIN_PAYROLL_DATA	GPDE_TX_AGS_NUM GPDE_AL_NM_VAL_PRS GPDE_TX01_RESULTS GPDE_RC_TX06 GPDE_RC_LN01 GPDE_TX_DATA
HCCPGPCHE Note: For GP Switzerland customers only.	GPCH_DEFINE_PAYROLL_SETUP	GPCH_AL_COMPLOC

PeopleSoft Pay Bill – Creating a new Role

To create a Role:

Select PeopleTools, Security, Permissions & Roles, Roles

Create a new role called **PBMUSER**

Add permission list **HCCPPB9000** to this role

Update your User Profile (for example, PS) to include this new role by selecting Select PeopleTools, Security, User Profiles.

Updating Web Libraries Permission

This step is applicable to GP **Germany** customers only.

To update Web Libraries permission:

Select PeopleTools, Security, Permission & Roles, Permission Lists.

Open up the *HCCPGPDEU* permission list.

Select Web Libraries Page.

Open *WEBLIB_GPDE*.

Click Edit and give Full Access to all ISCRIPts.

Click OK.

Save the Permission List.

Task X-2: Performing Post-Update Conversion Tasks

This section discusses the following:

- Running Scripts Against the Target Database with PeopleSoft Data Mover
- Running Scripts Against the Target Database using appropriate SQL editor

Running Scripts Against the Target Database with PeopleSoft Data Mover

Run the following scripts against your target database using PeopleSoft Data Mover:

Note. Change Assistant deploys the dms scripts & data files under <PS_HOME>\maint directory. If you don't find the script/dat file that you are looking for then unzip the Change Package and locate the script/dat file under <CP unzip directory>\upd<resolutionid>\upd<resolutionid>_batch\filereferences\maint.

1. For **Informix** customers using **ePerformance** only - If you have exported data in a single dat file using UPD624662_INFORMIX_BACKUP.DMS (in HC890_MP3_PRE.pdf) then you can use the following script. If you have exported data in multiple dat files then you will have to modify the script to import data from those dat files.

```
UPD624662_INFORMIX_RESTORE.DMS
```

For PeopleSoft **Pay Bill** customers only – The following script will import the PayBill demo data and node transactions into the Target HR 8.9 database.

```
dmodata_imp.dms - Run this script in Bootstrap mode
pbhcm_890_trx_i.dms
```

Running Scripts for Stored Statements

Run the following scripts to modify the steps within stored statements (for non-managed files). Storexx.dms scripts can be found on <ps_home>\src\cbl\base.

Note. Please run only those scripts that are applicable to your environment.

STOREAV.DMS
STOREFA.DMS
STORESR.DMS
STORESF.DMS

Running Scripts Against the Target Database using appropriate SQL editor

Run the following scripts against your target database using sql editor:

Note. Change Assistant deploys the sql scripts under <PS_HOME>\maint directory. If you don't find the file that you are looking for then unzip the Change Package and locate the sql file under <CP unzip directory>\upd643756\upd643756_batch\filereferences\maint.

1. The following script is applicable to PeopleSoft **Pay Bill** customers only. Please review and edit the script before running it.

Important! Oracle Customers please run the following statement against the HRMS 8.9 database using SQL*PLUS before running the following script: ALTER SESSION set NLS_Date_Format = 'YYYY-MM-DD'.

ACTIVATE_ALL_HCM.SQL

Update and run the following script.

upd616147_tree_audit_fix.sql

Task X-3: Performing Additional Update Activities

In this task, you will perform additional updates needed for the Maintenance Pack.

Note. Some instructions are for all products while others may be specific to a certain product. Please execute only those steps that are specific to your environment and Maintenance Pack installation.

This task discusses the following:

- PeopleSoft Time and Labor - Recompiling Time and Labor Rules
- PeopleSoft Campus Community – Modifying Query Security

- PeopleSoft Campus Community – Set up ‘Other Resource’ item types
- PeopleSoft Campus Community – Update Valid Fields
- PeopleSoft Campus Community – Setting up New Zealand National Student Index
- PeopleSoft Campus Community – Converting postscript compatible files to PDF compatible files

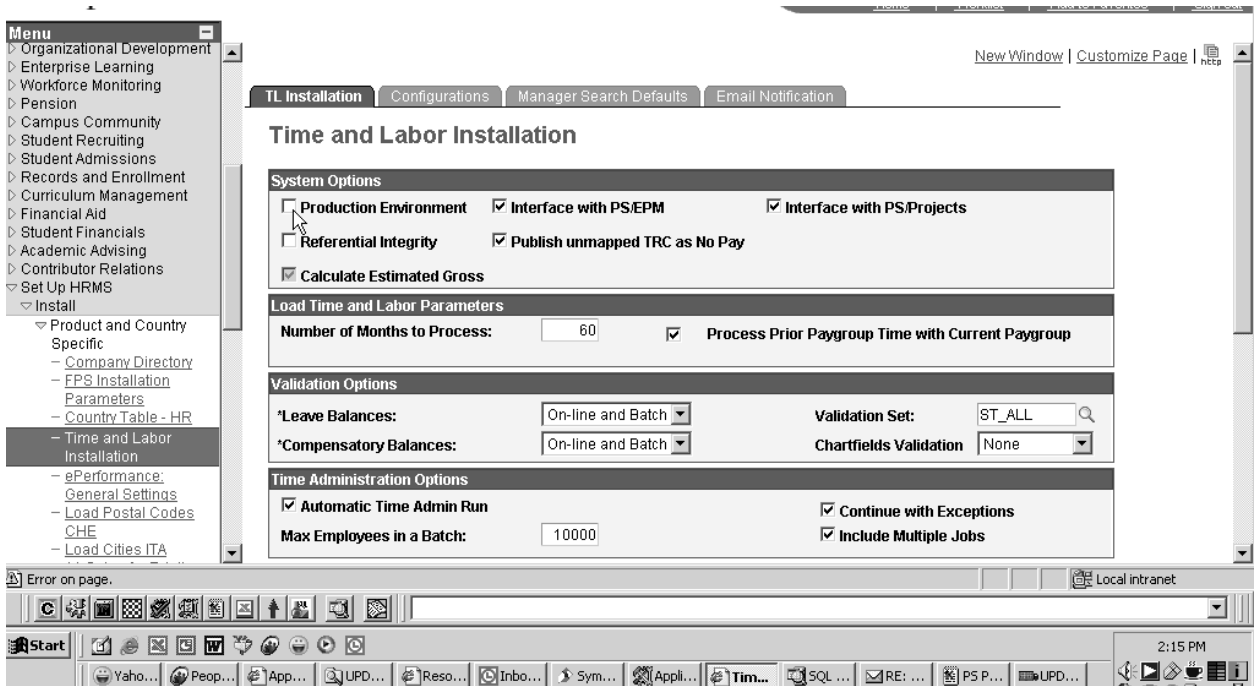
PeopleSoft Time and Labor - Recompiling Time and Labor Rules

To recompile all the rules:

Turn off the Production Environment flag as shown below.

Important! You must read step 2 before you perform step 1.

If you are using Referential Integrity, you need to make sure you export any data you have in the TL_RI_CNTRL_TBL before you turn off the Production Environment Flag on the TL Installation Settings page as this table will be deleted once you clear flag. You will re-import this data later in the procedure.



Select Setup HRMS, Product Related, Time and Labor, Rules and Workgroups, Template-Built Rules

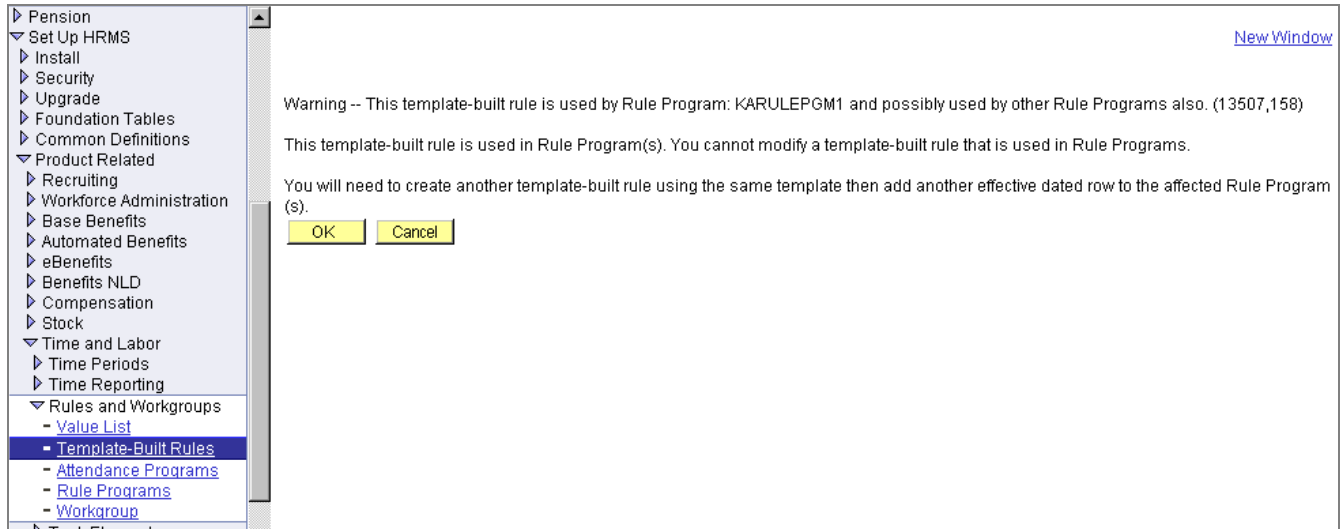
Recompile all the rules for the following Templates. Make a change in the description (for example, adding a period (.) at the end).

Template Type	Template Name
Daily Threshold	TEMPLATE010

Premium Zone	TEMPLATE100
Period Threshold	TEMPLATE021
Holiday	TEMPLATE060

Save your changes.

If the rule being recompiled is included in rule programs, a warning message similar to this one will be displayed:



After you have completed recompiling all of your Template-Built Rules, you will need to check the Production Environment checkbox back on, to enable the Referential Integrity process. If you use Referential Integrity process you must have taken back up of the TL_RI_CNTRL_TBL as described in step 2. Now restore that table again.

PeopleSoft Campus Community – Modifying Query Security

To modify Query Security:

Select PeopleTools, Security, Query Security, Query Access Manager

Open Tree Name *QUERY_TREE_SR*

Select and expand *QUERY_TREE_SR*

Select and expand *STUDENT REPORTS*

Use the *Insert Child Record* icon to Add the following child records:

SCC_INS_NAME_VW

Click **Save**.

Open Tree Name *QUERY_TREE_FA*

Select and expand *QUERY_TREE_FA*

Insert the following child records under **Loan Management, Loan Processing, Reconciliation**

SFA_CRC_ACTN_CD
 SFA_CRC_PERSON
 SFA_CRC_DEST_ID
 SFA_CRC_DISB
 SFA_CRC_AWARD
 SFA_CRC_LN_INFO
 SFA_CRC_STUDENT
 SFA_CRC_DOCUMNT

Insert the following child run control records under **Other**

SFA_CRC_903_RPT
 SFA_CRC_EFT_RPT
 SFA_CRC_PD_RPT

Click **Save**

PeopleSoft Campus Community – Set up ‘Other Resource’ item types

To setup ‘Other Resource’ item types:

Go to Set Up SACR, Product Related, Financial Aid, Awards, Award Messages

For your SETID and current processing aid year, create a Financial Aid Message Code of ‘OTHR’ with the description of ‘Item Type printed as part of Other Resources. Check ESTIMATE OF RESOURCES column’

Search for item types that are indicated as other resources by running this sql query: SELECT * FROM PS_ITEM_TYPE_FA WHERE FAN_PRINT_SPECS = ‘O’

Navigate to Set Up SACR -> Product Related -> Financial Aid -> Awards -> Financial Aid Item Types

For each of the item types returned by the query, add the message code of ‘OTHR’ to them. Insert a new effective dated row. Click on the ‘FA Item Type 3’ tab. Set the ‘Print Letter Option’ to ‘Print’. Select the radio button ‘Print as Other Resource’. Set ‘Award Message’ to ‘OTHR’

Click **Save**

PeopleSoft Campus Community – Update Valid Fields

To update valid fields:

Go to Set Up SACR, Product Related, Student Financials, Valid Fields

Select the appropriate SETID for your institution

Locate the Record of SEL_STDNORES_VW with the Description Academic Level - Term Start, with the field name of ACAD_LEVEL_BOT and Edit Table of XLAT_ACDL_MC_VW. It should be sequence number of 4.

Change the Edit Table from XLAT_ACDL_MC_VW to SSF_ACD_LVL_VW

Locate the Record of SEL_STDNORES_VW with the Description Academic Level - Term End, with the field name of ACAD_LEVEL_EOT and Edit Table of XLAT_ACDL_MC_VW. It should be sequence number of 5.

Change the Edit Table from XLAT_ACDL_MC_VW to SSF_ACD_LVL_VW

Locate the Record of SEL_STDNORES_VW with the Description Academic Level - Projected, with the field name of ACAD_LEVEL_PROJ and Edit Table of XLAT_ACDL_MC_VW. It should be sequence number of 49.

Change the Edit Table from XLAT_ACDL_MC_VW to SSF_ACD_LVL_VW

Click **Save**

PeopleSoft Campus Community – Setting up New Zealand National Student Index

Installation Setup:

Go to Set Up SACR -> Install -> Campus Community Installation

Click on the 'Extensions' tab

Set your 'Provider Code' to the correct value for your institution (Contact New Zealand Ministry Of Education if you do not have this information)

Set the 'Current File Number' to the number you wish (for example '1'). Do not set this number to '0'

If your institution desires to send the Ministry Of Education the online changes made to IDs that are NSI enabled:

Enable the checkbox 'Enable Online NSI Processing'

Click **Save**

To process changes applicable to a future date:

Go to PeopleTools, Application Engine, Request AE

Create a new run control record for program 'SCCNSISUSFUT' and use a new run control id of your own choosing (e.g. 'NSI_FUTURE_SUSPENSE')

Change Process Frequency to 'Always' and click the 'Run' button

Select a Server Name and select a Recurrence (e.g. 'Daily')

If you don't like any of the existing Recurrence choices, click the 'New Window' link on the upper right and navigate to PeopleTools -> Process Scheduler -> Recurrences and establish a recurrence to your preference. It ought to be a recurrence that runs once per day sometime after midnight but before opening of business (e.g. 'EffectiveDateChange'). Save it and close the window

Select process name 'SCCNISISUSFUT' and click the 'OK' button

Go to PeopleTools, Process Scheduler, Process Monitor and verify that the process has been correctly scheduled

To process changes applicable to a current date:

Open Application Designer. Open Message 'PERSON_BASIC_SYNC'. Right click on the message subscription 'SCC_NSI_PERSON_SYNC' and select 'Message Subscription Properties'. Enable the checkbox to 'Active' in the 'Status' group box. Click OK. On the menu, click File, Save. Close Application Designer.

Go to PeopleTools, Integration Broker, Integration Setup, Node Definitions and select your default local node

Click on the 'Transactions' tab. Click on the 'Request Message' header so that the transactions are sorted by the message names. If the 'PERSON_BASIC_SYNC' messages are not there for both InAsync and OutAsync for the 'INTERNAL' version, then add those two via the 'Add Transaction' button at the bottom of the page and set them to 'Active' status and click the 'Save' button at the bottom of the page.

Go to PeopleTools, Integration Broker, Monitor Integrations, Monitor Message

Click on the 'Channel Status' tab and make sure that the 'PERSON_DATA' channel is in 'Running' status

For additional integration broker configuration considerations, refer to the 'Integration Broker' manual

To use NSN field inside search record:

A new search record including the NSN field is being delivered: **SCC_PERSRCH_NZL**. This search record could be used to override the main search record called PEOPLE_SRCH. New Zealand schools should decide in which menus/components they want to allow their users to search with the NSN field. For example, they may want to override the search record in the menus: CC_BIO_DEMO_DATA [Campus Community -> Personal Information] or CC_BIO_DEMO_DATA_STDNT [Campus Community -> Personal Information (Student)].

PeopleSoft Campus Community – Converting postscript compatible files to PDF compatible files

To convert:

Either Adobe Distiller or Ghostscript will work for this purpose. Install the utility of your choice and note the location of the installed utility and the syntax of the command that converts a postscript file to a PDF file.

Customize the psp2pdf.cmd file in the scripts folder to invoke the postscript-to-pdf conversion utility with the first parameter being the postscript compatible file being input and the second parameter being the PDF compatible file being output. If the script references environmental variables other than PS_SERVDIR, then ensure that those environmental variables are set on the application server. PS_SERVDIR gets set automatically. For example, if GhostScript is used to convert the postscript compatible file to a PDF compatible file and the application server is

running Windows, then no changes are necessary to be made to the psp2pdf.cmd file. The system environmental variable "ghost_home" will need to be set only once on each application server, and it should point to the location where GhostScript was installed (e.g. C:\GS\GS8.14). If Adobe Distiller is used to convert the postscript compatible file to a PDF file and the application server is running Windows, then you can copy the psp2pdf_distillr.cmd file to overlay the psp2pdf.cmd file. This version of psp2pdf.cmd will require that the environmental variable "distillr_home" be set once on each application server. Note that on windows, the path for the ghost_home or the distillr_home folder must not contain any spaces in it. Use the 'short names' of folders for folders with spaces in their names. The value in the environmental variable cannot have a space in the name (e.g. C:\Apps\Adobe\Acrobat 5.0\Distillr). Instead, the short names of those directories should be used. To find the short name of a file or directory, open a command window and navigate to the parent folder via cd command (e.g. C:\Apps\Adobe) and then issue the command "dir /x", which would tell you the short name for "Acrobat 5.0" to be "ACROBA~1.0" (verify this by actually issuing the "dir /x" command). Finally, edit the system environmental variable accordingly. (e.g. "distillr_home" would have "C:\apps\Adobe\ACROBA~1.0\Distillr"). If some other utility is being used to convert the postscript compatible file to a PDF compatible file, then edit the psp2pdf.cmd file accordingly. If you copy the psp2pdf.cmd file onto a Unix application server, be sure to upload in ASCII mode so that carriage returns get stripped off. The psp2pdf.cmd file will have to be edited on Unix to conform to Unix shell file syntax accordingly. (E.g. the first line would be "#! /bin/sh" without the quotes, comment lines start with "#" without the quotes, file paths use forward slashes, not backslashes, shell variables are delimited with a "\$" in front of the variable, not with "%" both in front and behind the variable, etc.) A sample Adobe Distiller version of this file is provided that is called psp2pdf_distillr.cmd and a sample GhostScript version of this file is provided that is called psp2pdf_ghost.cmd. A generic Unix sample version is provided that is called psp2pdf_unix.cmd.

Ensure that there is a scripts folder on the application server with the psp2pdf.cmd file in it. For Unix operating systems, ensure that the file is marked as executable.