



Infor SmartStream® Migration Guide

Release 8.0
September 2012/Revised June 2026

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Publication Information

Release: Infor SmartStream 8.0

Publication date: September 2012/Revised June 2026

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1 About This Guide

Introduction

The SmartStream® *Migration Guide* from Infor describes

- The migration process
- Setting up your migration environment
- Migrating data to the new version of SmartStream, SmartStream 8.0
- Verifying that data migrated properly.

Audience

Those who migrate SmartStream products and data are the intended audience of this guide.

Prerequisites

You must be familiar with the supported versions of these products to migrate SmartStream products and data:

- Microsoft Open Client or Sybase Software Developer's Kit (SDK)
- Microsoft SQL Server or Sybase Adaptive Server Enterprise
- Windows
- SmartStream products
- Your mail software product

Conventions

The check box to the left of text () identifies a task you complete during the migration process.

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Before You Begin

Before you begin the migration process,

- Install your SmartStream 8.0 products, including all languages and SmartStream Builder as applicable. See the SmartStream *Installation Guide*.
- Ensure that your audit user ID and password is configured.

SmartStream has the ability to maintain an audit of users attempting to log on to SmartStream. Whether you choose to audit logon attempts for your organization or not, the audit user ID and password **must be correctly configured** to access the database to determine the logon auditing option.

For configuration instructions, see Post-Installation Task for SmartStream in the Preparing and Installing the File Server chapter of the SmartStream *Installation Guide*.

- Apply all appropriate update deliverables (service packs, cumulative updates, and individual updates to your SmartStream 7.0 environment (you cannot migrate to SmartStream 8.0 if you do not do this).

For a list of these prerequisites, visit the Infor Concierge to review the Installation and Migration Roadmap Knowledge Base (KB) article.

- Read this guide to become familiar with the tasks and the migration process.
- Find all the relevant KB articles on the Infor Concierge.

- Consider running archive/purge processes on high-volume tables changed for SmartStream 8.0. Depending on the volume of data in the processed tables, archiving and purging data from them can significantly reduce the time required to complete the migration process.

For a list of the tables changed for SmartStream 8.0 and the archive/purge processes you might want to run, see Appendix B, Table Changes.

- Complete the appropriate worksheet for your migration scenario.

Upgrade in Place for SmartStream 8.0

If you are migrating from SmartStream 7.0.03 to SmartStream 8.0, you have two methods to select from:

- Traditional migration (described in this guide)
- Upgrade in Place (applies only to your database server)

Upgrade in Place is much faster. If you use Upgrade in Place, however, you still need to install a new file server area and reinstall clients and Job Servers. For instructions for performing an upgrade in place, see the *Upgrade in Place* guide.

Migration Process Overview

To migrate successfully from your current version of SmartStream to SmartStream 8.0, you must complete the following tasks in the order shown:

- Install a new 8.0 environment.
- Tailor the new environment to mirror your current SmartStream environment. This is critical if you have tailored the user-defined accounting key (UDAK) in your current environment.
- Create bulk copy files (.bcp) of the data in your current environment and import them into the new 8.0 environment.

This guide steps you through each of the preceding tasks to complete the migration process.

Terms

The environment you migrate...	Is referred to as your...
From	Current environment (this includes 7.0.03)
To	8.0 or new environment

Supported Migration Scenarios

SmartStream provides these migration scenarios:

Migration Scenario	Description
Current Release to New Release	You can migrate from SmartStream 7.0.03 with Sybase Adaptive Server Enterprise or Microsoft SQL Server to SmartStream 8.0 with Sybase Adaptive Server Enterprise or Microsoft SQL Server.
Same to Same	You can migrate from one SmartStream environment to another SmartStream environment as long as both environments have the same release installed and both environments have the same SmartStream update deliverables applied. As with migrating from the current release to a new release, you can migrate from Sybase Adaptive Server Enterprise or Microsoft SQL Server to Sybase Adaptive Server Enterprise or Microsoft SQL Server.

The migration process is the same for Current Release to New Release and Same to Same migration.

Character Set

Make sure that your 8.0 platform uses the same character set that your current platform uses; otherwise, errors might occur.

What Is and Is Not Migrated

This section describes the products and data

- Migrated using SmartStream automated and manual processes
- Not migrated using SmartStream-supported processes.

What Is Migrated

The migration process migrates data, users, groups, and permissions for tables and views from all SmartStream databases.

What Is Not Migrated

The migration process does not migrate

- Non-SmartStream databases and their associated data and objects (stored procedures, triggers, views, and tables)
- Non-SmartStream data and objects stored in SmartStream databases in your current environment
- Databases and their associated data and objects built using SmartStream Builder
- Mail messages.

Maintaining Data Integrity

Maintaining data integrity while migrating from one version of SmartStream to another is critical.

Recommendations

Review the following recommendations for maintaining data integrity before beginning the migration process:

- Prepare your server environments before migrating data. For more information, see Chapter 2, Preparing for Migration.
- Back up your
 - Current server and client environments
 - 8.0 environment.
- Ensure that no one is working in your current SmartStream environment during the migration process.
- Ensure that you have successfully completed the migration process before you make the 8.0 environment your production environment.
- Set up the new server and client workstations as test environments until you are confident that the data migrated properly.

Variables That Affect Migration Time

The time required to migrate data varies depending on the following characteristics of your enterprise:

- Computing and networking capabilities
- Licensed products
- Tailored features, such as a user-defined accounting key and language kits
- Database variables, such as the size and number of tables
- Number of saved specifications and reports

2 Preparing for Migration

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About Preparing for Migration

This chapter describes how to prepare your environments to migrate SmartStream data.

Read this chapter and set up the required configuration before beginning the migration process.

Process Overview

This table describes the process for preparing to migrate your SmartStream products and data:

Stage	Description
1	Access the Knowledge Base on the Infor Concierge for the latest migration information and apply all appropriate 7.0.03 update deliverables (service packs, cumulative updates, and individual updates) listed in the Installation and Migration Roadmap KB article.
2	Plan your migration process using the appropriate worksheet so that you will have the information you need when it is required during the migration process.
3	Prepare the migration environment.
4	Prepare the SmartStream server environments.
5	Establish connectivity to the <ul style="list-style-type: none">▪ Servers▪ Database management system (DBMS).
6	Load language kits to the appropriate database server if you license language kits, and tailor your user-defined accounting key (UDAK).
7	Run the SmartStream Table Initialization program on the destination server to <ul style="list-style-type: none">▪ Clear the tables▪ Prepare the cleared tables for migration.

Using the Knowledge Base on the Infor Concierge

The Knowledge Base on the Infor Concierge contains the latest SmartStream migration information. Before starting the migration process

- Review the Critical Issues document for SmartStream 8.0
- Apply all required 7.0.03 update deliverables listed in the Installation and Migration Roadmap.

For more information about using the Infor Concierge, see the *SmartStream Release Introduction* document.

Planning Your Migration

Because the migration process involves several steps and varies depending on the products and versions of SmartStream you are migrating, taking the time to plan your migration tasks is very important.

Planning Aids

The following planning aids help you plan the migration of your SmartStream products and data:

- Installation and Migration Roadmap
- SmartStream Migration Worksheet

Installation and Migration Roadmap

The Installation and Migration Roadmap contains a list of the prerequisites for migration and a high-level overview of migration tasks. Access the Installation and Migration Roadmap on the Infor Concierge. Print the roadmap and track your progress through the migration process.

SmartStream Migration Worksheet

Use the SmartStream Migration Worksheet to record information about your environment that you need during the migration process.

The SmartStream Migration Worksheet is in Appendix A, Migration Worksheet.

Preparing the Migration Environment

Ensure that the products you plan to migrate from your current environment are installed in your 8.0 environment. This helps prevent errors.

Migration Workstation

Run the migration process from a Windows workstation that conforms to the supported technical environments specification for SmartStream 8.0 found in the Supported Technical Environments for SmartStream 8.0 Knowledge Base article.

Exported File Location

Data in your current environment is extracted to .bcp files in your SmartStream 8.0 environment.

The data is always extracted to your SmartStream 8.0 file server.

Space Requirement

Ensure that sufficient space is allocated on the server where the .bcp files are extracted. This space should be equal to or greater than the amount of space used in the DBMS data segments.

Preparing Database Server Environments

Complete the following task to set up your database server environments before beginning the migration process:

Required Information

- Gather this information for your current and 8.0 environments:
 - Server name
 - Server Internet Protocol (IP) address
 - System administrator or database owner password

Establishing Connectivity

Ensure that you can connect the migration workstation with the databases in both your current and 8.0 environments.

Operating System Connectivity

If you are migrating from...	And to...	Then the migration workstation must connect to the...
A UNIX operating system and Sybase SQL Server DBMS	A UNIX operating system and Sybase Adaptive Server DBMS	Current server and 8.0 file server.
Windows and either Sybase SQL Server DBMS or Microsoft SQL Server	Windows and either Sybase Adaptive Server DBMS or Microsoft SQL Server	Current server and 8.0 file server.

The data is always extracted to your SmartStream 8.0 file server.

DBMS Connectivity

- Ensure that available log space is maximized on your current and 8.0 DBMS using these commands:

Use this command...	To...
<code>dump database db_name</code>	Back up both the database and its transaction log.
<code>dump tran database db_name with no_log</code>	Clear the log of the completed transactions.

- Verify that the workstation you plan to use for 8.0 migration can connect to your current DBMS server. See the **Supported Technical Environments** for your release for the correct version of third party tools.

If your current DBMS is...	Then you must have...
Sybase	Sybase PC Client.
Microsoft SQL Server	Microsoft Open Client

Troubleshooting the Connection

If your 8.0 DBMS is...	Then check the...
Sybase Adaptive Server running on Windows	Dsedit utility on the migration workstation.
Microsoft SQL Server running on Windows	Microsoft SQL Server Client Network Utility.

Migration Workstation Connectivity

- Verify that the migration workstation can connect to the current and 8.0 database servers.

Read and Write Privileges

- Ensure that you have both read and write privileges for the drive and directory on the file server where SmartStream 8.0 resides.

Initializing SmartStream Tables

Purpose

This program

- Clears the tables to remove all data
- Loads minimum required data into the 8.0 tables.

Running the SmartStream Table Initialization Program

Run the SmartStream Table Initialization program on the destination server using this program:

drive:\directory\dbms\setup.exe

Where

- *drive* is the drive where SmartStream 8.0 is installed
- *directory* is the directory where SmartStream 8.0 files reside

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate windows, go to Initializing Tables in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

Backing Up Your Environments

Back up your current and 8.0 environments.

Reinstalling SmartStream Client on the Migration Workstation

For SmartStream 8.0, a SmartStream client is no longer required on your migration workstation.

3 Tailoring Your Accounting Key

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About Tailoring Your Accounting Key

This chapter describes how to tailor your accounting key for your 8.0 environment. You perform these tasks before migrating data so that your tables and databases match your accounting key when you migrate them.

Considerations for Tailoring Your Accounting Key

Tailor your accounting key for your 8.0 environment if you

- Tailored your accounting key for your current production environment
- Are adding products to your 8.0 environment that use the user-defined accounting key.

Column Names

You can migrate SmartStream data successfully only if column names in your 8.0 environment are the same as those in your current environment.

Prerequisite Tasks

Complete the following tasks before beginning any procedures for tailoring your accounting key:

- Language kit customers must ensure that language kits are loaded to their appropriate database servers. If you perform a file server installation with language kits, but you do not load the language kits, errors occur when you tailor your accounting key.
- Ensure that the workstation you are using to run the User-Defined Accounting Key program has SmartStream 8.0 client installed.
- Initialize your SmartStream 8.0 tables to prepare them for migration and tailoring.
- Ensure that the workstation you are using to run the User-Defined Accounting Key program has the supported version of PowerBuilder installed (See the **Supported Technical Environments** for your release).

Process Overview

This table describes the process for migrating your SmartStream accounting key:

Stage	Description
1	Copy the udak.ini file from your current environment to your 8.0 environment.
2	Tailor your accounting key for your 8.0 environment.
3	Apply the accounting key.
4	Regenerate your dynamic run-time library (.pbd file).

Copying the Current udak.ini File

This table describes how to copy the udak.ini file from your current environment to your 8.0 environment:

Copy udak.ini from this directory...	To this directory...
<i>drive:\directory\dbms\udak</i>	<i>drive:\directory\dbms\udak</i>
Where	Where
<ul style="list-style-type: none"> ▪ <i>drive</i> is the drive where your current version of SmartStream is installed ▪ <i>directory</i> is the directory where your current SmartStream files reside. 	<ul style="list-style-type: none"> ▪ <i>drive</i> is the drive where SmartStream 8.0 is installed ▪ <i>directory</i> is the directory where SmartStream 8.0 files reside

Tailoring Your Accounting Key

Running the User-Defined Accounting Key Program

Run the User-Defined Accounting Key program separately for each of the following products in the order shown:

1. All currently licensed products
2. Consolidations, if currently licensed
3. All newly licensed products
4. Consolidations, if newly licensed

Setup Options

You choose specific options each time you run the User-Defined Accounting Key program. These options are as follows:

For...	Choose...
Database Server Status	Available - Full install completed.
Run Mode	Full - Process all UDAK objects for a given Product.

Procedure

Run this program:

`drive\directory\dbms\udak\udak.exe`

Where

- *drive* is the drive where SmartStream 8.0 is installed
- *directory* is the directory where SmartStream 8.0 files reside

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate windows, go to the Tailoring the Delivered Accounting Key section in Configuring Your User-Defined Accounting Key in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

Verifying Your Tailored Accounting Key

Complete these tasks to verify your tailored accounting key:

- Perform the activities in the User-Defined Accounting Key program for reviewing or confirming your selections
- Check the `\dbms\udak\udak.log` file for errors

Applying Your Accounting Key

You run this program to apply your tailored accounting key to tables, stored procedures, and triggers.

Run this program:

`\drive\directory\dbms\udak\setup.exe`

Where

- *drive* is the drive where SmartStream 8.0 is installed
- *directory* is the directory where SmartStream 8.0 files reside

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate windows, go to the *Compiling Your Accounting Key* section in *Configuring Your User-Defined Accounting Key* in Chapter 14, *Installation-Migration Checklists with Illustrated Procedures*, of the *Installation Guide*.

Building Runtime Library

After applying your accounting key, build the Runtime Library (udak.pbd).

Procedure

To build the Runtime Library, complete this procedure:

Step	Action
1	Open PowerBuilder.
2	On the File menu, click New. Result: The New dialog box appears.
3	On the Workspace tab, click the Workspace button and click OK. Result: The New Workspace dialog box appears.
4	Select the lss directory on your SmartStream file server as the target directory, name the workspace udakWS800.pbw, and click Save. Result: The udakWS800.pbw workspace is created in the directory you selected. The dialog box closes and the main PowerBuilder window is available again.
5	Click the new workspace.
6	On the File menu, click New. Result: The New dialog box appears.
7	On the Target tab, click the Existing Application button and click OK. Result: The Choose Library and Application dialog box appears.
8	Expand the lss directory and then the udak.pbl Library , click the UDAKPBL Application, and then click Next. Result: The Set Library Search Path dialog box appears.
9	Accept the default and click Next. Result: The Specify Target File dialog box appears.
10	Name the target file udakWS800.pbt and click Finish. Result: The dialog box closes and the main PowerBuilder window is available again.
11	Expand your workspace then your target, right-click udak.pbl, and click Optimize. Result: If the Library Backup Replacement confirmation prompt is displayed, click Yes. The main PowerBuilder window is available again.
12	Right-click udak.pbl and click Build Runtime Library. Result: The Build Runtime Library dialog box appears.
13	Complete the settings as follows and click OK: <ul style="list-style-type: none">▪ Clear the Machine Code check box if checked▪ Select FULL as the build type▪ Leave Resource Filename blank

Step	Action
14	At the Replace existing <i>path</i> /udak.pbd? prompt, click Yes. Result: The Runtime Library (udak.pbd) is built.

Tip

If the Machine Code check box is not cleared, PowerBuilder generates udak.dll instead of udak.pbd. Repeat steps 12 through 14 and clear the Machine Code check box.

Language Kits

The preceding steps must be completed for the udak.pbl in the \ss directory for each language kit.

Illustrated Procedures

To see procedures for these tasks with pictures of the appropriate windows, go to Regenerating the Dynamic Runtime Library in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

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Before You Begin

Before migrating data to SmartStream 8.0, complete the tasks discussed in all previous chapters of this guide.

Worksheet

Use the migration worksheet provided in Appendix A to help plan your migration to SmartStream 8.0.

About Preparing and Migrating

This chapter describes how to

- Perform the prerequisite tasks
- Run the SmartStream Migration program.

Migration Process

The SmartStream Migration program

- Exports product data from your current environment
- Imports product data into your 8.0 environment.

Migration Series

The entire migration process is known as a *migration series*.

Example

If you set up an 8.0 test environment and successfully export and import your products and data, you have completed a migration series. When you are ready to migrate to your production environment, you complete another migration series.

Prerequisite Tasks for Migrating SmartStream Products and Data

SmartStream Budget Workbench

- Ensure that all SmartStream Budget WorkBench sessions are closed and that the WorkBench information is exported to the server.
- Use the Budget Checkout List window to make sure that none of the budgets have a status of In Use.
- Lock all budgets until the migration process is complete.

To export WorkBench information, each user should choose the Export action from the WorkBench Data Access window. Do not start other WorkBench sessions until the migration process is complete.

SmartStream Human Capital Management

SmartStream does not migrate the information in your audit tables. If you want to keep your audit information from the current version, you must back up the information before you install SmartStream Human Capital Management 8.0.

After you install SmartStream 8.0, you must

1. Run the Audit Builder program in your SmartStream 8.0 environment to generate the SQL code for the audit tables and triggers to match the tables from the current version.
2. Load the tables and triggers the Audit Builder program generates to your server.
3. Copy the information that you backed up.

Notes:

- To determine which audit tables are added or changed for SmartStream 8.0, see Appendix B, Table Changes.
- The tables from the current version must match the tables in SmartStream 8.0. If the tables do not match, your audit information cannot be properly restored.
- If you need to audit columns in SmartStream 8.0 that you did not audit before, be sure to process the audit information from the current version before you start tailoring audit tables in SmartStream 8.0.

SmartStream Purchasing

The following SmartStream Purchasing tables do not migrate:

- purchase_order_ext
- purchase_order_line_ext
- purchase_order_in_sched_ext

Before migrating, run any of the following Purchasing reports:

- Purchase Order - Draft
- Purchase Order - Fax
- Purchase Order - Print
- EDI Orders and Changes

After migrating, you can reprint purchase orders using the following procedure:

Step	Action
1	Open the Select Purchase Orders to Send window, click the Select Purchase Order History button, and mark the purchase orders to resend.
2	Run the Purchase Order Update scheduled process (mpoc0030).
3	Run the Purchase Order Extract scheduled process (mpoc0100).
4	Generate the printed output.

Running the SmartStream Migration Program

The SmartStream Migration program is run twice: once to export data and a second time to import data into your 8.0 environment.

Backing Up Data

Back up your current and 8.0 environments before you run the SmartStream Migration program.

Functions and Process

The SmartStream Migration program migrates data in the following stages:

Stage	The SmartStream Migration program...
1	Exports the data from your current SmartStream database server.
2	Stores data in .bcp files.
3	Imports the data from the extracted .bcp files to the 8.0 database server.

Procedure

Do not enter a slash as the first character of a path or directory. Entering a slash incorrectly causes an error.

Run this program:

```
drive:\directory\dbms\smartmig\setup.exe
```

Where

- *drive* is the drive where SmartStream 8.0 is installed
- *directory* is the directory where SmartStream 8.0 files reside.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate migration windows, go to Running the Migration Program in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

Tailoring Your Accounting Key

After the migration process is complete, run `udak.exe` to process architecture tables. You must run this process at least once. If you have installed Consolidations, you need to run `udak.exe` a second time.

UDAK Options

Choose these options when you run the User-Defined Accounting Key program:

For...	Choose...
Database Server Status	Available - Full Install Completed.
Processing Level	All Products (except Consolidations).
Run Mode	Special - Process the following object class: Architecture Tables.

For Consolidations Users Only

Consolidations users must run `udak.exe` a second time using these UDAK options:

For...	Choose...
Database Server Status	Available - Full Install Completed.
Processing Level	Consolidations.
Run Mode	Special - Process the following object class: Architecture Tables.

Illustrated Procedures

To see a procedure for this task with pictures of the appropriate windows, go to Processing the Architecture Tables in Special Mode in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

5 Post-Migration Tasks

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Before You Begin

Complete the tasks in the previous chapters of this guide before beginning post-migration tasks.

About Post-Migration Tasks

You perform several tasks after running the SmartStream Migration program to

- Verify that the program exported and imported data accurately and completely
- Complete the migration process for SmartStream products that have additional requirements
- Migrate data not processed by the program.

The migration process is not complete until these tasks are accomplished.

Results of Running the Migration Program

Export Process

The export process generates .bcp files that contain the data for each family that it migrates.

Import Process

The import process

- Truncates the tables in the 8.0 environment.
- Loads the extracted .bcp files to your 8.0 environment.
- Adds migrated data into the tables that did not change. The number of rows exported will match the number imported, except for tables with minimum required data. For these tables, a difference in the number of rows does not necessarily matter. See *Verifying Successful Migration* later in this chapter.
- Adds default values for the new fields to the migrated data for tables with new fields. The number of rows exported will match the number imported.
- Provides SQL code for the tables that change to determine correct values and adds the appropriate values to the migrated data.
- Reloads the static initial data.

Using Files Generated by the Migration Program

The migration program generates the following types of files:

- Error
- Output
- Restart

File Location

Files generated by the...	Are stored in the...
Export process	<i>drive:\directory\instenv\env\smartmig\export</i> directory.
Import process	<i>drive:\directory\instenv\env\smartmig\import</i> directory.

Error Files

The migration program generates error files (.err) when errors occur during the export and import processes. Diagnose the problem and correct the error before continuing the migration process.

Output Files

Output files (.out) contain a record of errors during or operations executed by the migration process. This table describes each type of output file:

This type of output file...	Describes...	And is stored in this location...
bcperror.out	A .bcp file problem that caused an error during the export or import process	<i>/dbms/family</i> directory.
family.out	Each operation performed to migrate a family, such as exporting, dropping triggers, and loading data	<ul style="list-style-type: none"> ▪ Export Process <i>drive:\directory\instenv\env\smartmig\export</i> ▪ Import Process <i>drive:\directory\instenv\env\smartmig\import</i>

Table Rows

Each output file displays the number of rows for each database table that is either exported or imported.

Row Locations

The row locations of database tables in export output files might differ from those in the import output files.

Restart Files

When an error occurs while the migration program is running, a restart file (.rst) is generated for the export and import processes. This file identifies where to start the migration program after you correct the error. Do not delete these files.

Troubleshooting

If an error occurs while a .bcp file is processed during the import process, an error window displays the name of the table that caused the error.

Procedure

To correct the error and continue the migration program, complete this procedure:

Step	Action
1	Clear the table on the 8.0 server where the error occurred.
2	Correct the error.
3	Choose Restart to restart the migration program from the point where the error occurred.

Note: If you do not clear the table, duplicate insert errors occur when you restart the migration program.

Post-Migration Tasks for SmartStream Products

The following sections discuss tasks you must complete after migration.

SmartStream Client

Reinstall the SmartStream client on all workstations after you finish migrating to your SmartStream 8.0 environment.

SmartStream provides several options for reinstalling SmartStream clients. For information about the available options, see *Considerations for Upgrading SmartStream Client Workstations* in Chapter 8, *Installing SmartStream Products on the Client Workstations*, of the *Installation Guide*.

License Management Software

After SmartStream client reinstallation, you must load your product license usage key (PLUK) information using the Update Product Usage Keys action on the License Management Software window.

For more information, see the License Management Software chapter of the *SmartStream Administration* guide.

Job Server

Perform the following tasks to complete the migration program for Job Server:

Poll Configuration

If you are using APPC for SmartStream Connect 8.0 communications, verify that the APPC communication information is correct. Use the APPC view of the Poll Configuration window to verify this information.

More Information

For information about the Poll Configuration window, see the SmartStream Library.

Migrated Jobs and Classes

Consider this information:

- When migrating jobs to SmartStream 8.0, retain the associated classes. If you change classes or add new classes, you have to change or add jobs.
- If your migrated jobs contain steps that run executable, Job Server, or script files, ensure that the file and path names are valid on the SmartStream 8.0 server.

Encryption Enhancement

SmartStream 8.0 introduces a new encryption algorithm. This enhancement is intended to provide better protection for sensitive information stored by SmartStream, such as user IDs and passwords.

Conversion Utility

The pswdconv.bat conversion utility provided by the enhancement converts the values in these columns to the new encryption format:

Column	Table
arpc_cfg_password	DBSarpc...arpc_cfg
encrypted_personal_id_nbr_1	DBShrpn..emp_pin
psc_password	DBSpscb...psc_security_detail
password	DBSwact...user_password

The pswdconv.bat file resides in the **DBMS** folder on the SmartStream file server. It runs the prpcenc.exe program residing in the same folder.

The pswdconv.bat file accepts these arguments:

Argument	Description
1	Table family to convert. The valid values are arpc , hrpc , pscb , wact , or ALL (all four table families).
2	Name of the server where the SmartStream databases are installed.
3	User ID with database update permissions on the server for the tables specified in Argument 1.
4	Password for the user ID specified in Argument 3.
5	Folder where the prpcenc.exe program resides (optional).

Log File

A log file showing the results of running the conversion utility is generated in the folder specified in Argument 5. If Argument 5 is not used, the log file is generated in the folder from which the pswdconv.bat file was run (the default is the **DBMS** folder on the SmartStream file server).

The name of the log file uses this naming convention:

prpc_encryption_migration_YYYYMMDD_HHMMSS.log

Where

- YYYYMMDD is the year, month, and day of the run
- HHMMSS is the hour, minute, and second

HCM Considerations

The conversion of SmartStream Web Employee Self-Service passwords in the SmartStream emp_pin table is now possible. After the new passwords are generated, an employee must enter his or her new password (uppercase employee ID) in the Password field on the Employee Self-Service Home page.

Warning: We do not recommend running the conversion utility multiple times. If an employee changes his or her password before conversion, the conversion utility resets the changed password to the employee's uppercase employee ID.

Ledger Data Security Enhancement

For SmartStream 8.0, Ledger data security was redesigned.

Background

This enhancement removes the following restrictions that applied to defining data security for Ledger and Funds Control activities before SmartStream 8.0:

- The from-to ranges were applied by column rather than row. For example, this table shows a data security definition for the Ledger Account control type using the original design:

Ranges	Ledger Entity	Division	Account
From	0	ADMIN	10000
To	5000	ADMIN	19999
From	A	PLANT1	40000
To	CZZZZ	PLANT99	49999
From	USA		
To	USA		

In this example, the user has access to any account that matches one of the ranges in each column. Therefore, the BAL01-ADMIN-41110 accounting distribution (BAL01 ledger entity, ADMIN division, and 41110 account) passes data security validation even though those elements are from different rows in the definition.

This enhancement, however, addresses the request to limit access by row. Using the new design, the user would not have access to BAL01-ADMIN-41110.

- The Security Data Control window had a limited number of rows, and the number of rows varied by control type. For Ledger activities, the limit was up to 10 rows. Frequently, that number was insufficient. For example, the new design requires 12 rows to reproduce the data security definition in the preceding table.

Before SmartStream 8.0, Ledger shared the Security Data Control window with all other SmartStream products that used data security. With SmartStream 8.0, a new Ledger Security Data Control window was added.

Implementation

Implementing the data security enhancement requires a thorough review of your current implementation of Ledger data security so that you can structure data security for Ledger and Funds Control activities using the new design.

Before You Begin Migration

Before you migrate to SmartStream 8.0, we recommend that you run the following delivered reports so that you thoroughly understand your current data security implementation:

- Access the SmartStream Reference Tool window and select **Activity by Data Control** as the report type. Run this report for each the following applications for which data security is set up using **All** in the Activities field:
 - Ledger
 - Journals
 - Funds Control
- Access the Security Report Extract File window. Using **Data Control Security** as the Extract type, produce an extract file for each activity and control type combination shown on the SmartStream Reference Tool report you just ran.

If you prefer, you can run SQL similar to the following samples, copy the results into a spreadsheet, and use the spreadsheet to analyze your current Ledger data security.

These tables contain all the information about your Ledger data security implementation:

- DBSglep..ldr_scrty_entity
- DBSglep..ldr_scrty_acct
- DBSglep..ldr_scrty_acct_bal
- DBSjepc..jrnل_post_entity_scrty

You can tailor the following SQL samples:

Ledger Entity

```
SELECT
CASE user_or_grp_id_type
  WHEN '1' THEN 'User'
  WHEN '2' THEN 'Group'
  ELSE 'Does not exist!!'
END as user_or_grp_id_type
,user_or_grp_id
,CASE user_or_grp_id_type
  WHEN '1' THEN (select RIRIM(first_name) + ' ' + RIRIM(last_name) from DBSwact..user_master_1 um where um.user_id =
1.user_or_grp_id)
  WHEN '2' THEN (select RIRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id = 1.user_or_grp_id)
END as 'user_or_grp_name'
,l.activity_id, am.activity_desc
,CASE data_ctrl_type
  WHEN '1' THEN 'Inquire'
  WHEN '2' THEN 'Maintenance'
END as data_ctrl_type
,ldr_entity_from_01, ldr_entity_to_01
,ldr_entity_from_02,ldr_entity_to_02,ldr_entity_from_03,ldr_entity_to_03
,ldr_entity_from_04,ldr_entity_to_04,ldr_entity_from_05,ldr_entity_to_05
,ldr_entity_from_06,ldr_entity_to_06,ldr_entity_from_07,ldr_entity_to_07
,ldr_entity_from_08,ldr_entity_to_08,ldr_entity_from_09,ldr_entity_to_09
,ldr_entity_from_10,ldr_entity_to_10
FROM DBSglep..ldr_scrty_entity l
INNER JOIN DBSwact..activity_master_1 am
on l.activity_id = am.activity_id
```

Ledger Account

```

SELECT
CASE user_or_grp_id_type
  WHEN '1' THEN 'User'
  WHEN '2' THEN 'Group'
  ELSE 'Does not exist!!'
END as user_or_grp_id_type
,user_or_grp_id
,CASE user_or_grp_id_type
  WHEN '1' THEN (select RIRIM(first_name) + ' ' + RIRIM(last_name) from DBSwact..user_master_1 um where um.user_id =
1.user_or_grp_id)
  WHEN '2' THEN (select RIRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id = 1.user_or_grp_id)
END as 'user_or_grp_name'
,1.activity_id, am.activity_desc
,CASE data_ctrl_type
  WHEN '1' THEN 'Inquire'
  WHEN '2' THEN 'Maintenance'
END as data_ctrl_type
,ldr_entity_from_01, ldr_entity_to_01
,ldr_entity_from_02,ldr_entity_to_02,ldr_entity_from_03,ldr_entity_to_03
,ldr_entity_from_04,ldr_entity_to_04,ldr_entity_from_05,ldr_entity_to_05
,ldr_entity_from_06,ldr_entity_to_06,ldr_entity_from_07,ldr_entity_to_07
,ldr_entity_from_08,ldr_entity_to_08,ldr_entity_from_09,ldr_entity_to_09
,ldr_key_a_from_01, ldr_key_a_to_01,ldr_key_a_from_02, ldr_key_a_to_02
,ldr_key_a_from_03, ldr_key_a_to_03,ldr_key_a_from_04, ldr_key_a_to_04
,ldr_key_a_from_05, ldr_key_a_to_05,ldr_key_a_from_06, ldr_key_a_to_06
,ldr_key_a_from_07, ldr_key_a_to_07,ldr_key_a_from_08, ldr_key_a_to_08
,ldr_key_a_from_09, ldr_key_a_to_09
,ldr_key_b_from_01, ldr_key_b_to_01,ldr_key_b_from_02, ldr_key_b_to_02
,ldr_key_b_from_03, ldr_key_b_to_03,ldr_key_b_from_04, ldr_key_b_to_04
,ldr_key_b_from_05, ldr_key_b_to_05,ldr_key_b_from_06, ldr_key_b_to_06
,ldr_key_b_from_07, ldr_key_b_to_07,ldr_key_b_from_08, ldr_key_b_to_08
,ldr_key_b_from_09, ldr_key_b_to_09
FROM DBSglep..ldr_scrty_aoct 1
INNER JOIN DBSwact..activity_master_1 am
on 1.activity_id = am.activity_id

```

Ledger Account Balance

```

SELECT
CASE user_or_grp_id_type
  WHEN '1' THEN 'User'
  WHEN '2' THEN 'Group'
  ELSE 'Does not exist!!'
END as user_or_grp_id_type
,user_or_grp_id
,CASE user_or_grp_id_type
  WHEN '1' THEN (select RIRIM(first_name) + ' ' + RIRIM(last_name) from DBSwact..user_master_1 um where um.user_id =
1.user_or_grp_id)
  WHEN '2' THEN (select RIRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id = 1.user_or_grp_id)
END as 'user_or_grp_name'
,l.activity_id, am.activity_desc
,CASE data_ctrl_type
  WHEN '1' THEN 'Inquire'
  WHEN '2' THEN 'Maintenance'
END as data_ctrl_type
,ldr_entity_from_01, ldr_entity_to_01
,ldr_entity_from_02,ldr_entity_to_02,ldr_entity_from_03,ldr_entity_to_03
,ldr_entity_from_04,ldr_entity_to_04,ldr_entity_from_05,ldr_entity_to_05
,ldr_entity_from_06,ldr_entity_to_06
,ldr_key_a_from_01, ldr_key_a_to_01,ldr_key_a_from_02, ldr_key_a_to_02
,ldr_key_a_from_03, ldr_key_a_to_03,ldr_key_a_from_04, ldr_key_a_to_04
,ldr_key_a_from_05, ldr_key_a_to_05,ldr_key_a_from_06, ldr_key_a_to_06
,ldr_key_b_from_01, ldr_key_b_to_01,ldr_key_b_from_02, ldr_key_b_to_02
,ldr_key_b_from_03, ldr_key_b_to_03,ldr_key_b_from_04, ldr_key_b_to_04
,ldr_key_b_from_05, ldr_key_b_to_05,ldr_key_b_from_06, ldr_key_b_to_06
,amt_class_from_01, amt_class_to_01, amt_class_from_02, amt_class_to_02
,amt_class_from_03, amt_class_to_03, amt_class_from_04, amt_class_to_04
,amt_class_from_05, amt_class_to_05, amt_class_from_06, amt_class_to_06
,processing_yr_from_01, processing_yr_to_01, processing_yr_from_02, processing_yr_to_02
,processing_yr_from_03, processing_yr_to_03, processing_yr_from_04, processing_yr_to_04
,processing_yr_from_05, processing_yr_to_05, processing_yr_from_06, processing_yr_to_06
FROM DBSglep..ldr_scrty_acct_bal l
INNER JOIN DBSwact..activity_master_1 am
on l.activity_id = am.activity_id

```

Posted Entity

```

SELECT
CASE user_or_grp_id_type
  WHEN '1' THEN 'User'
  WHEN '2' THEN 'Group'
  ELSE 'Does not exist!!'
END as user_or_grp_id_type
,user_or_grp_id
,CASE user_or_grp_id_type
  WHEN '1' THEN (select RIRIM(first_name) + ' ' + RIRIM(last_name) from DBSwact..user_master_1 um where um.user_id =
1.user_or_grp_id)
  WHEN '2' THEN (select RIRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id = 1.user_or_grp_id)
END as 'user_or_grp_name'
,1.activity_id, am.activity_desc
,CASE data_ctrl_type
  WHEN '1' THEN 'Inquire'
  WHEN '2' THEN 'Maintenance'
END as data_ctrl_type
,ldr_entity_from_01, ldr_entity_to_01
,ldr_entity_from_02,ldr_entity_to_02,ldr_entity_from_03,ldr_entity_to_03
,ldr_entity_from_04,ldr_entity_to_04,ldr_entity_from_05,ldr_entity_to_05
,ldr_entity_from_06,ldr_entity_to_06,ldr_entity_from_07,ldr_entity_to_07
,ldr_entity_from_08,ldr_entity_to_08,ldr_entity_from_09,ldr_entity_to_09
,ldr_entity_from_10,ldr_entity_to_10
FROM DBSjepc..jml_post_entity_sarty 1
INNER JOIN DBSwact..activity_master_1 am
on 1.activity_id = am.activity_id

```

After Migration

If your current Ledger data security implementation is simple, after the automated migration process migrates it to the new format, it will probably continue to work as it did before. However, if your current data security implementation is complex or you are not satisfied with it, we recommend deleting the migrated Ledger data security and redefining your Ledger data security using the improved functionality (Ledger Account and Ledger Account Balance data security are the most likely candidates for this recommendation).

Limitations of the Automated Migration. Because of the limitations in the number of rows allowed and the way OR logic worked in the original data security design, the migration of a complex Ledger data security implementation can result in the generation of many data security rows that are not needed.

Also, the new design imposes a restriction on overlapping rows. Overlapping rows are not allowed because they can result in the same data being returned more than once on queries, which in turn causes inaccurate reporting results. Because overlaps were not restricted before SmartStream 8.0, the migration process can generate overlapping rows, and it is designed to ignore them.

Prerequisite Task for Implementing SmartStream 8.0. Before implementing SmartStream 8.0, you must run a stored procedure that addresses the limitations of the automated migration using this command:

```
Execute DBSglep..fsp_edit_glsdc_upgrade
```

Although no parameters are required, you can choose to debug one data security table at a time by entering a parameter that allows you to specify the table you want to analyze:

These are the accepted values:

- gls1 - Ledger Entity
- gls2 - Ledger Account
- gls3 - Ledger Account Balance
- jes1 - Posted Entity

For example, to analyze the Ledger Account Balance table, enter this command:

```
Execute DBSglep..fsp_edit_glsdc_upgrade 'gls3'
```

After the data is migrated, review the results of the migration for validity and efficiency. Also, determine whether to take advantage of the new functionality.

Redefining Ledger Data Security Using New Functionality

If you choose to redefine Ledger data security (recommended if current Ledger data security is complex), we recommend that you complete this procedure:

Step	Action
1	Truncate any of the tables you want to redefine. The data on the Ledger data security tables is independent, so you can define an individual table or any combination of tables.
2	Analyze your Ledger data security needs and design some data security templates to use. Be sure to design these templates separately for users and groups.
3	Using the new Ledger Security Data Control window, define your templates for valid users and groups. The window will validate the data.
4	Use SQL to copy the templates to other users and groups. Do not copy users to groups or groups to users. Triggers prevent you from defining invalid data (for example, overlaps and duplicates).
5	As a final check, run the DBSglep..fsp_edit_glsdc_upgrade stored procedure for the table that was updated using SQL.

Verifying Final Implementation

To verify your final implementation, we recommend that you complete a process similar to the one you used before migration to check your new Ledger data security.

You can use the SmartStream Reference Tool and Security Report Extract File windows, which have been updated to report on the redesigned tables, or you can tailor the sample SQL to provide results from the redesigned tables.

Changes to Batch Programs

The following changes to batch programs are related to this enhancement.

Ledger

Data security can now be defined for the Ledger Load (fglc0920) and Ledger Maintenance (fglc0910) programs.

Archive/Purge

Running previously defined Ledger and Funds Control archive/purge requests can cause these errors, where *number* is the message number and *nn* is 01 through 10:

```
The application encountered an error. Contact your system administrator with the following information: DBMS message number, state 2, severity 207, Invalid column name 'ldr_entity_from_nn'.
```

```
The application encountered an error. Contact your system administrator with the following information: DBMS message number, state 2, severity 207, Invalid column name 'ldr_entity_to_nn'.
```

These errors occur because the SQL script stored with the request has not been updated to reflect Security Data Control table changes associated with the Ledger data security enhancement.

To resolve this issue, open the archive/purge request, make a small change (to ensure that correct processing occurs), undo the change, and save the request.

This table lists the Funds Control archive/purge processes that are affected:

Archive/Purge ID	Description
ffcfblcad	Archive Fund Balance to Disk
ffcfblcah	Archive Fund Balance to History
ffcfbldad	Archive Fund Balance History to Disk
ffcfctxad	Archive Fund Transactions to Disk
ffcfctxah	Archive Fund Transactions to History
ffcfctxdad	Archive Fund Transactions History to Disk

This table lists the Ledger archive/purge processes that are affected:

Archive/Purge ID	Archive/Purge Name
fjejea1cad	Journal History Archive to Disk
fjejepccad	Journal Archive to Disk
fjejepccah	Journal Archive to History
fjejea1dad	Journal History Archive to Disk - Direct
fjejepcdad	Journal Archive to Disk - Direct

Preparing for New and Updated Batch Programs

SmartStream 8.0 delivers several new batch programs and changes several others.

The following table lists the new or updated batch programs and the changes associated with using them.

In the table, changes are designated as required when you must make them or the program will not run. They are designated as optional when you need to make them only if you want to use the new feature.

Program	Response Required or Optional	Response
Ledger Posting (fglc0900)	Required	Review your current job scheduling because this process was changed to prevent a posting request from starting if another posting request for the same source system and entity is currently running.
Ledger Load (fglc0920)	Required unless otherwise noted	<p>Define data security appropriate for the data being loaded. Security for subledger documents is no longer used for this program.</p> <ul style="list-style-type: none"> ▪ Unposted journals - fje0010 (plus fgl0400 if an account must be auto generated). Because this feature is optional, you must enable the new Journal Load Data Security option on the Ledger view of the Enterprise Policy window to use it. If this option not selected, journal load functions as it did in the past. ▪ Account Load - fglc0920 (plus fgl0400 if an account is added) ▪ Balance Load - fglc0920 (plus fgl0400 if an account must be auto generated) ▪ Average Daily Balances - fglc0920

Program	Response Required or Optional	Response
Ledger Maintenance (fglc0920)	Required	Define data security appropriate for the data being maintained. Security for subledger documents is no longer used for this program. <ul style="list-style-type: none"> ▪ Account maintenance ▪ Balance maintenance
Revaluation (fglc0930)	Required	Define Delete/Add/Change/Inquire activity security for users who need to run this process.
Average Balances Update (fglc0950)	Required	Define Delete/Add/Change/Inquire activity security for users who need to run this process.
Ledger COA Validation (fglc0970)	Optional	Set up a new scheduler job to use the new feature.
Rollup Structures Explosion (ffcc0300)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvi file to trigger debugging instead.
Funds Control Journal Creation (ffcc0900)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvi file to trigger debugging instead.
Fund Transaction Upload (ffcc1100)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvi file to trigger debugging instead.
Funds Control Year End (ffcc2000)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvi file to trigger debugging instead.
Requisition-to-Purchase-Order process (mpob0020)	Required	Update previously added scheduler job to add new Combine Requisitions on the Same Purchase Order parameter.
Approval Reminder (pssc0070)	Optional	Set up a new scheduler job to use the new feature.
Regulatory Report Format Control Record Load (hpyru01)	Optional	Replaces hpyrvu01.sqt.
Employee Tax Exempt Report (hpyrvr01)	Optional	Replaces hpyrvr01.sqt.
Local Tax Detail Report (hpyrvr02)	Optional	Replaces hpyrv02.sqt.
Federal W-2 reporting (hpyrvr03)	Optional	Replaces hpyrvr03.sqt.
State W-2 reporting (hpyrvr04)	Optional	Replaces hpyrvr04.sqt.

Program	Response Required or Optional	Response
State Quarterly Tape or File reporting (hpyrvr05)	Optional	Replaces hpyrvr05.sqt.
Multiple Worksite reporting (hpyrvr06)	Optional	Replaces hpyrvr06.sqt.
Federal 1099-R Tape (hpyrvr07)	Optional	Replaces hpyrvr07.sqt.
Federal Unemployment Tax Return Form 940 (hpyrvr08)	Optional	Replaces hpyrvr08.sqt.
Federal Quarterly Tax Return Form 941 (hpyrvr09)	Optional	Replaces hpyrvr09.sqt.
Federal Annual Income Tax Withheld Return Form 945 (hpyrvr10)	Optional	Replaces hpyrvr10.sqt.
State Quarterly Form reporting (hpyrvr11)	Optional	Replaces hpyrvr11.sqt.
Payroll Regulatory Reporting Print Utility (hpyrvr12)	Optional	Replaces hpyrvr12.sqt.
Payroll Regulatory Reporting Delete Utility (hpyrvr13)	Optional	Replaces hpyrvr13.sqt.
Employee ROE (hpyrvr14)	Optional	Replaces hpyrvr14.sqt.
T4 Form (hpyrvr16)	Optional	Replaces hpyrvr16.sqt.
Releve 1 Form (hpyrvr17)	Optional	Replaces hpyrvr17.sqt.
T4A reporting (hpyrvr22)	Optional	Replaces hpyrvr22.sqt.
Provincial Tax Detail (hpyrvr23)	Optional	Replaces hpyrvr23.sqt.
State W-3 reporting (hpyrvr24)	Optional	Replaces hpyrvr24.sqt.
Pennsylvania Local Reporting (hpyrvr25)	Optional	Replaces hpyrvr25.sqt.

Language and Country Codes

The migration program adds all available countries and languages to the Country Master and Language Master tables in the DBSCOMMON database. Your system administrator can use the Country Selection and Language Selection windows to add the countries and languages that you want SmartStream to use from the master tables to the Active List and to the Country Code and Language Code tables.

More Information

For information about selecting languages and countries, see the SmartStream Library.

Security

New activities have been delivered and some have been dropped with this latest version of SmartStream. These activities cannot be automatically added to or deleted from your security groups because your enterprise must maintain security profiles.

To set up activity security and data control security for the new activities for the appropriate users, your security administrator needs to complete the following steps:

Step	Action				
1	Give the security administrator authority to administer security for the following new activities using the Security Administrator activity: <table border="1"><thead><tr><th>Activity ID</th><th>Name</th></tr></thead><tbody><tr><td>fgl0700</td><td>Ledger Security Data Control</td></tr></tbody></table>	Activity ID	Name	fgl0700	Ledger Security Data Control
Activity ID	Name				
fgl0700	Ledger Security Data Control				
2	Using the Activity Security window, assign the appropriate access to the new activities for the users and security groups.				
3	Notify the appropriate users to customize their activity lists so that they can access the new activities from the SmartStream desktop.				

For more information about setting up SmartStream security, see the Users and Security chapter of the *SmartStream Administration* guide.

SmartStream Payroll

After completing the migration program, you set up the ALLTAX data files on the Job Server where you installed the Payroll components of Job Server.

More Information

For information about setting up the ALLTAX data files, see the *Payroll Tax* guide in the SmartStream Library.

Verifying Successful Migration

You can verify that data migrated successfully using

- Output files
- Reports
- Activities.

Using Output Files

Review output files each time you run the SmartStream Migration program to verify that no errors occurred and all data processed.

Comparing the Number of Table Rows

Compare the number of rows for each table in the export output file with the number of rows in the import output file. If they do not match, the data might not have migrated successfully.

However, for tables with minimum required data that you can reload, and in some cases update, the number of rows can be different without indicating a problem. For a list of these tables, see Appendix C, Tables with Minimum Required Data.

Using Reports

Generate reports in the current environment and the 8.0 environment, and then compare the output to ensure that the reports match.

These reports can be used to verify the migration:

Product	Report
Asset Management	Expense Ledger
	Cost Summary
Ledger	Chart of Accounts
	Account Balance
Payables	Aged Unpaid Balance
	AP Liability
Receivables	Aged Trial Balance

Using Activities

Run activities in your current environment and your 8.0 environment, and then ensure that the results of the activities are the same.

Adding Security

You might need to add data security for activities added to your 8.0 environment before you access them.

Activities to Use

These activities can be used to verify the migration:

Product	Activity
Asset Management	Asset Category Tables Asset Entity Policy Asset Location Tables Assets
Shared Components	Enterprise Policy
Ledger	Account Balance
Human Resources	Benefits Plan Employee Assignment Employee Status Payroll Run Control
Payables	Invoice Payment Details
Receivables	Receivable Account Receivable Allocation History Receivable Document (and views) Remittance

Migrating Non-SmartStream Data

Any objects, databases, or Microsoft Access reports created in your current environment are not automatically migrated.

Objects and Databases

To migrate non-SmartStream objects and databases in your current environment to the 8.0 environment (see *What Is and Is Not Migrated* in Chapter 1, *Overview*), use utilities provided by a product's vendor. For example, to copy table data, you can use the Sybase bulk copy utility (BCP).

Consult the following references:

- *System Administration Guide* for Sybase Adaptive Server Enterprise
- SQL Server Utility Programs for SmartStream information

Microsoft Access Reports

To migrate Microsoft Access reports, export the .accdb files you added to your current production environment and import them into your 8.0 environment using Microsoft Access.

Migrating Windows Customized by SmartStream Builder

PowerBuilder windows customized by SmartStream Builder will not migrate automatically. For more information, see the SmartStream Technical Upgrade Procedures for PowerBuilder Objects document included in KB article 559155.

6 Completing the Migration Process

Chapter Contents

6-1	About Completing the Migration Process
6-2	Process Overview
6-3	Reloading New Products
6-4	Reloading Language Kits
6-5	Tailoring Your Accounting Key

About Completing the Migration Process

This chapter describes how to perform the tasks that complete the migration process. You must complete the tasks discussed in this chapter before your 8.0 environment is ready for production.

Audience

Complete these tasks if your enterprise

- Licensed new products
- Has language kits
- Tailored your accounting key.

Process Overview

This table describes the process for completing the migration process:

Stage	Description
1	If you licensed any new products and loaded them before migration, reload them after migration. Otherwise, install new products after migration.
2	If you licensed any language kits, reload them to the appropriate database server.
3	If you tailored your accounting key, run the udak.exe program in Special mode, using the Architecture Tables option.

Reloading New Products

If you licensed new products with SmartStream 8.0 and loaded them before migrating, reload them after the migration. Do not load education data.

If you licensed new products with SmartStream 8.0 but did not load them before migrating, install them after the migration. Do not load education data.

More Information

See the SmartStream *Installation Guide* for more information about installing new products.

Reloading Language Kits

If you licensed language kits for SmartStream 8.0, reload the language kits (for all products) to the appropriate database server after reloading any new products as applicable.

Language versions of platform data (for example, error messages, file open parameters) are not automatically migrated. The migration process truncates all platform data and migrates it from the previous version to SmartStream 8.0. The language kits must be reloaded to reinstall language-specific platform data.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate windows, go to Reloading SmartStream Language Kits in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

Tailoring Your Accounting Key

If you tailored your accounting key for SmartStream 8.0, after reloading new products and language kits (if applicable), run the `udak.exe` program in Special mode, using the Architecture Tables option.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate windows, go to Processing the Architecture Tables in Special Mode in Chapter 14, Installation-Migration Checklists with Illustrated Procedures, of the *Installation Guide*.

Appendix A Migration Worksheet

Appendix Contents

A-1	About the Migration Worksheet
A-2	Migration Worksheet

About the Migration Worksheet

This appendix contains a worksheet that is designed to help you determine the information you need during the migration process, such as

- Environment variables
- Product information.

Planning Your Migration

If you use the worksheet to plan your migration, you minimize the risk of errors throughout the migration process. Print this worksheet so that you can record and refer to the information.

Migration Worksheet

Export Process

SmartStream Environment

Directory where SmartStream is installed in the current environment:

Name of the environment you are exporting: _____

Database Server Information

Current database server name: _____

SA role ID for this database server: _____

SA password for this database server: _____

Product Selection

Use this table to identify the products to export:

Product	Are you exporting this product?	
	Yes	No
Background Load	Yes	No
Cost Management	Yes	No
Items	Yes	No
Euro	Yes	No
Funds Control	Yes	No
Procurement Common	Yes	No
Projects	Yes	No
Shared Components	Yes	No
SmartStream	Yes	No
SmartStream Allocations	Yes	No
SmartStream Asset Management	Yes	No
SmartStream Billing	Yes	No
SmartStream Budget	Yes	No
SmartStream Builder	Yes	No
SmartStream Connect	Yes	No
SmartStream Consolidations	Yes	No
SmartStream Ledger	Yes	No
SmartStream Payables	Yes	No
SmartStream Payroll	Yes	No
SmartStream Personnel	Yes	No
SmartStream Purchasing	Yes	No

Product	Are you exporting this product?	
SmartStream Receivables	Yes	No
SmartStream Receiving	Yes	No
SmartStream Supplies Management	Yes	No
Unit of Measure	Yes	No

Import Process

Database Server Information

The database server name and the SA role ID fields automatically display the information you entered during the export process.

SA password for this database server: _____

Product Selection

Use this table to list the products you are importing:

Product	Are you importing this product?	
Background Load	Yes	No
Cost Management	Yes	No
Items	Yes	No
Euro	Yes	No
Funds Control	Yes	No
Procurement Common	Yes	No
Projects	Yes	No
Shared Components	Yes	No
SmartStream	Yes	No
SmartStream Allocations	Yes	No
SmartStream Asset Management	Yes	No
SmartStream Billing	Yes	No
SmartStream Budget	Yes	No
SmartStream Builder	Yes	No
SmartStream Connect	Yes	No
SmartStream Consolidations	Yes	No
SmartStream Ledger	Yes	No
SmartStream Payables	Yes	No
SmartStream Payroll	Yes	No
SmartStream Personnel	Yes	No
SmartStream Purchasing	Yes	No

Product	Are you importing this product?	
SmartStream Receivables	Yes	No
SmartStream Receiving	Yes	No
SmartStream Supplies Management	Yes	No
Unit of Measure	Yes	No

Use this table to enter the server logon information for the SmartStream 8.0 database server where you want to import data:

Name of 8.0 Database Server	SA User ID	SA Password

Appendix B Table Changes

Appendix Contents

B-1	About Table Changes
B-2	Changed Tables
B-5	Dropped Tables
B-6	New Tables

About Table Changes

This appendix lists tables changed, dropped, and added between SmartStream 7.0.03 and the latest SmartStream release.

Changed Tables

The following tables were changed between SmartStream 7.0.03 and the latest SmartStream release.

Archive/Purge Considerations

If we recommend archiving and purging data from a table before running migration to reduce the time required to complete migration processing, the name and identifier of the appropriate archive/purge process is listed in the Recommended Purge Process column.

To remove the data from all tables, and thus get the most benefit during migration

- Do not select the Perform Archive option
- Archive the tables to disk.

SmartStream

Table Family	Database	Table ID	Table Name	Recommended Purge Process
ctlgddl	DBSctlg	scit	sp_cum_ind_tbl	
wact	DBSwact	loga	logon_audit	
		sgpm	sec_group_master	
		stpww	server_temp_password	
		usrp	user_password	
		wlog	win_logins	
		scpo	security_policy	
		usmm	user_master_1	
pscb	DBSpscb	pscd	psc_security_detail	
arpc	DBSarpc	acfg	arpc_config	
osst	DBSosst	mpec	mpc_extract_criteria	
		msec	mpc_structure_extract_criteria	

Shared Components

Table Family	Database	Table ID	Table Name	Recommended Purge Process
entp	DBSentp	btch	batch_parameters	
		lena	entp_ldr_policy_audit	
		lenp	entp_ldr_policy	
		aena	entp_ast_policy_audit	
		aenp	entp_ast_policy	
		gena	entp_general_policy_audit	
		genp	entp_general_policy	
		pena	entp_payable_policy_audit	
		penp	entp_payable_policy	
vmst	DBSvmst	vnbt	vendor_trans	
vpur	DBSvpur	vpur	vendor_loc_purchasing	

Asset Management

Table Family	Database	Table ID	Table Name	Recommended Purge Process
fast	DBSfast	flse	ast_lease	
fwrk	DBSfwrk	fgsq	work_generated_sql	
		frpt	work_report_process_controller	

Funds Control

Table Family	Database	Table ID	Table Name	Recommended Purge Process
fund	DBSfund	fctx	fund_transactions	
		fcxa	fund_transactions_audit	
		fcwk	fund_checking_work	
fwrk	DBSfwrk	fgsq	work_generated_sql	
		frpt	work_report_process_controller	

Ledger

Table Family	Database	Table ID	Table Name	Recommended Purge Process		
glep	DBSglep	gccw	ldr_comb_checking_work			
		gcsd	sync_coa_with_struct_rqst_dtl			
		gcsr	sync_coa_with_struct_rqst			
		gida	ldr_intraentity_rule_dtl_audit			
		gird	ldr_intraentity_rule_dtl			
		gjgl	jrnl_transl_audit_glep_lines			
		gjta	jrnl_transl_audit			
		glaa	ldr_acct_maint_audit			
		glba	ldr_acct_bal_maint_audit			
		glep	ldr_entity_policy			
		gljt	ldr_transl_controls_rules_work			
		gls1	ldr_scrty_entity			
		gls2	ldr_scrty_acct			
		gls3	ldr_scrty_acct_bal			
		glaa	ldr_acct_maint_audit			
		glba	ldr_acct_bal_maint_audit			
		glep	ldr_entity_policy			
		glaa	ldr_acct_maint_audit			
		glba	ldr_acct_bal_maint_audit			
		glep	ldr_entity_policy			
		glaa	ldr_acct_maint_audit			
		glba	ldr_acct_bal_maint_audit			
		glep	ldr_entity_policy			
		glaa	ldr_acct_maint_audit			
		glba	ldr_acct_bal_maint_audit			
		glep	ldr_entity_policy			
		glaa	ldr_acct_maint_audit			
		glba	ldr_acct_bal_maint_audit			
		glpd	work_ldr_pds_PM{EIF_SS			
		jepc	DBSjepc	jes1	jrnl_post_entity_scrty	
				jea2	posted_jrnl_line_archive	
				jedl	del_jrnl_line_audit	
				jepl	posted_jrnl_line	

Payables

Table Family	Database	Table ID	Table Name	Recommended Purge Process
prqt	DBSprqt	prqr	pmt_rqst_archive	
		prqt	pmt_rqst	
pymt	DBSpymt	pypl	pmt_temp_print_log	
		ptbw	pmt_trial_balance_work	

Payroll

Table Family	Database	Table ID	Table Name	Recommended Purge Process
hrpa	DBShrpa	hcpt	emp_pmt_canadian_prov_tx_dtl	
		hpft	emp_pmt_us_federal_tax_detail	
hrpy	DBShrpy	hetc	empl_us_tax_reconciliation	
		hcpt	emp_pmt_canadian_prov_tx_dtl	
		hcva	emp_can_provincial_tax_accum	
		hpfa	emp_us_federal_tax_accum	
		hpft	emp_pmt_us_federal_tax_detail	

Personnel

Table Family	Database	Table ID	Table Name	Recommended Purge Process
hrpn	DBShrpn	heeo	eeo_reporting_establishment	
		hpin	emp_pin	
		hag1	emp_property_aud	
		hect	emp_can_tax_authority	
		hpta	emp_us_tax_authority	
		hptt	empl_tax_entity_us_tax_auth	
		hpux	us_tax_authority	
		httd	tax_type_descp	
		htxt	tax_type	
		au73	empl_tax_ent_us_tax_auth_aud	
		hrpd	ben_plan_grp	
		hrpq	ben_administer_event	
		hwed	work_sqr_emp_data	
		hwer	work_sqr_emp_roe	
		hw1d	work_sqr_1099_dist	

Table Family	Database	Table ID	Table Name	Recommended Purge Process
hrac	DBShrac	hipr	individual_personal	
		hroe	emp_roe	
		hvap	work_vets_100A_parent_company	
		hvah	work_vets_100A_hiring_location	
		hveh	work_vets_100_hiring_location	
		hvep	work_vets_100_parent_company	
		hver	work_vets_100_report_extract	
		heep	work_eeo_1_eeoc_output	
		heou	work_eeo_4_eeoc_output	
		hpd1	work_eeo1_epdr_report_output_1	
		hpd2	work_eeo1_epdr_report_output_2	
		hpd3	work_eeo1_epdr_report_output_3	
		hpd4	work_eeo1_epdr_consolidation	
		hpd5	work_eeo1_epdr_extract	
		hpd6	work_eeo1_epdr_establishment	
		her1	work_epr_report_output_1	
her3	work_epr_report_output_3			
her4	work_epr_extract			

Purchasing

Table Family	Database	Table ID	Table Name	Recommended Purge Process
reqm	DBSreqm	rpow	req_to_po_conv_work	
		rqpw	req_to_po_fc_work	
puen	DBSpuen	pobt	purchase_order_trans	

Receivables

Table Family	Database	Table ID	Table Name	Recommended Purge Process
rrcv	DBSrrcv	rrs2	recv_entity_security_ctrl_alt	
		rws2	recv_entity_wr_off_scrty_alt	

Supplies Management

Table Family	Database	Table ID	Table Name	Recommended Purge Process
mabl	DBSmabl	list	load_item_stockroom	

Dropped Tables

No tables were dropped.

New Tables

The following tables are new.

SmartStream

Table Family	Database	Table ID	Table Name
ctlgddl	DBSctlg	idfx	index_xref_1
		sobw	sysobjects_work
wact	DBSwact	acul	activity_custom_col_labels
		cdtb	code_table
		cxde	ssw_context_msg_data_entities
		cxdi	ssw_context_msg_data_ids
		cxmd	ssw_context_message_def
		cxpg	ssw_context_page
		cxpm	ssw_context_page_msg_xref
		gbpm	generic_browse_parm
		mldt	master_list_dtl_1
		mlhr	master_list_hdr_1
		mlsc	master_list_sec_data_1
		mlsd	master_list_search_dtl_1
		mlsh	master_list_search_hdr_1
		nsc2	step_conditions_work2
		nscw	step_conditions_work
		sswt	SSWeb_tracking
		wpap	ssw_apps_1
		wpfv	ssw_favorites
		wpme	ssw_menus
		wpmn	ssw_menus_1
osst	DBSosst	dsnw	SRG_DATA_SUMM_NAVIGATION_WORK
		stqa	SRG_PMQA_STRUCT_COL_ASSN_REF
pscb	DBSpscb	wlg2	ssw_psc_log
		wmsg	ssw_psc_messages
		wmwk	ssw_psc_messages_work

Table Family	Database	Table ID	Table Name
mesm	DBSCOMMON	emap	esb_element_mapping
		esba	esb_expression
		esbb	esb_request
		esbc	esb_request_work
		esbd	esb_tracking_inbound
		esid	ESB_INBOUND_DUPLICATE
		espm	ESB_PREVIOUS_VERSION_MEDIATION
		esvm	ESB_VARIATION_ID_MEDIATION

Shared Components

Table Family	Database	Table ID	Table Name
entp	DBSentp	rept	entp_reporting_parms
vmst	DBSvmst	vcaa	vendor_loc_category_archive

Asset Management

Table Family	Database	Table ID	Table Name
fast	DBSfast	flsa	ast_lease_activity
		flsc	ast_lease_comnt
		flse	ast_lease
		flss	ast_lease_schedule
		flst	ast_lease_amort
		flta	ast_lease_amort_hist
		lamt	lease_ast_maint_trans
fwrk	DBSfwrk	frca	report_selections_criteria
		frcc	report_selection_comnt
		frpc	report_proc_controller_comnt
		frps	report_selection
		frsc	report_selection_criteria
		frsq	report_standard_sql

Funds Control

Table Family	Database	Table ID	Table Name
fwrk	DBSfwrk	frca	report_selection_criteria_aud
		frcc	report_selection_comnt
		frpc	report_proc_controller_comnt
		frps	report_selection
		frsc	report_selection_criteria
		frsq	report_standard_sql

Ledger

Table Family	Database	Table ID	Table Name
glep	DBSglep	gadc	ldr_activity_data_ctrl
		gcwv	ldr_comb_checking_work_volume
		glic	ldr_invalid_combinations
		glsa	ldr_data_scrty_audit
		gcrw	ldr_comb_checking_rules_work
		gcsd	sync_coa_with_struct_rqst_dtl
		gcsr	sync_coa_with_struct_rqst
		gjfc	jrnل_transl_accrل_no_funds_chk
		gspa	subledger_posting_dates_aud
		gspd	subledger_posting_dates
		lara	restricted_ldr_acct_aud
		ljar	restricted_ldr_acct
		F9ec	F9_reporting_extract_criteria
		F9ud	F9_reporting_udak_extract
		jpec	DBSjpec
gfem	msgs_fichier_comptabilite		
jema	unposted_journal_mini_audit		

Payables

Table Family	Database	Table ID	Table Name
prqt	DBSprqt	prhc	pmt_rqst_hold_release_criteria
		prhr	pmt_rqst_hold_release
pymt	DBSpymt	ptbw	pmt_trial_balance_work

Receivables

Table Family	Database	Table ID	Table Name
iwrk	DBSiwrk	ratb	recv_atb_ddraft_extract_QA
		ratc	recv_atb_rpt_input_QA
		ratd	recv_atb_aging_range_QA
		rate	recv_atb_eff_draft_QA
		ratf	recv_atb_fixed_doc_QA
		ratg	recv_atb_fixed_draft_QA
		rath	recv_atb_ddoc_extract_QA

Personnel

Table Family	Database	Table ID	Table Name
hrpn	DBShrpn	hace	aca_employee
		hacf	aca_dependents
		hacr	aca_provider
		hrpp	ben_life_and_work_event
		hrpq	ben_administer_event
		hrpr	ben_event_period_domain
hrac	DBShrac	hv4c	work_vets_4212_consolidation
		hv4e	work_vets_4212_extract_err
		hv4h	work_vets_4212_hiring_location
		hv4p	work_vets_4212_parent_company
		hv4r	work_vets_4212_report_extract

Supplies Management

Table Family	Database	Table ID	Table Name
cost	DBScost	csvp	cost_server_process

Appendix C Tables with Minimum Required Data

Appendix Contents

- C-1 About Tables with Minimum Required Data
 - C-2 Application Tables
-

About Tables with Minimum Required Data

This appendix lists current application tables that have minimum required data for SmartStream 8.0.

Application Tables

The tables in this section list the application tables that contain minimum required data by SmartStream product. They provide such information as the database in which the application table resides, the name of the application table, and whether the minimum required data (MRD) in the application table can be updated.

Shared Components

Database	Table Name	MRD Updateable?
DBSpurg	purge_activity_descr	
	purge_activity_control	
	purge_activity_column_operator	
	purge_selection_criteria	
	purge_group_table	
	purge_related_processes	
	purge_validation_rules	
DBSbank	pmt_transfer_formats	
	type_of_pmt	
DBScmre	country_currency	
DBSentp	acctg_object_description	
	addr_format	
	acctg_object_default_hir	
	batch_parameters	Yes
	days_of_week	
	months_of_year	
	country_sub_entity	
	funds_ctrl_account_type	Yes
	acctg_distn_type	
	acctg_distn_type_usage	
	phone_format	
	sortable_col	
	tax_form_types	
DBSpclh	period_type	Yes
DBSCOMMON	udak_key_layout	Yes
	udak_dw_master	

Asset Management

Database	Table Name	MRD Updateable ?
DBSfast	ast_message_master	
	ast_message_master_lang	
	ast_text	

Background Load

Database	Table Name	MRD Updateable?
DBSmabl	bulk_load_trans_columns	Yes
	bulk_load_descr	Yes
	bulk_load_trans_id	Yes

Consolidations

Database	Table Name	MRD Updateable?
DBScons	csldtn_policy	Yes

Euro

Database	Table Name	MRD Updateable?
DBSEURO	euro_subldr_conv_parms	

Funds Control

Database	Table Name	MRD Updateable?
DBSfund	fund_reason_codes	

Ledger

Database	Table Name	MRD Updateable?
DBSglep	ldr_jnrl_lead_acctg_distn_type	
	ldr_jnrl_origin_code_descp	
	ldr_jnrl_source_desc	
	control_parameter_type	
	control_parameter_values	Yes

Payables

Database	Table Name	MRD Updateable?
DBSprqt	payables_draft_activity_desc	
	matching_exception_descp	

Personnel

Database	Table Name	MRD Updateable?
DBShapm	import_export_ctrl	Yes
DBShrac	work_report_eea_occup_grp	Yes
	work_report_eea_salary_summary	Yes
DBShrpn	aggregate_descp	Yes
	hr_audit_ctrl_tbl_descp	Yes
	hr_audit_ctrl	Yes
	hr_audit_master	Yes
	code_entry_policy	Yes
	code_policy	Yes
	canadian_tax_authority	Yes
	canadian_standard_tax_credits	Yes
	disbursal_print_template	Yes
	aggregate	Yes
	activity_menu	
	adj_payroll_run_type	Yes
	us_tax_authority	Yes
	hrpoint_function	
	hrpoint_function_name	Yes
	hrpoint_menu	
	hrpoint_menu_description	Yes
	hrpoint_sys	
	hrpoint_sys_description	Yes
	report_proc_db_xref	
regulatory_report_record_fmt		
tax_type_descp	Yes	
tax_type		

Procurement Common

Database	Table Name	MRD Updateable?
DBScntl	history_options_initial	
DBSotpm	mfg_order_status_codes	
	mfg_order_type_codes	

Receivables

Database	Table Name	MRD Updateable?
DBSrrcv	remit_algorithm_definition	Yes
	recv_draft_activity_descp	
	recv_reason_code	

Supplies Management

Database	Table Name	MRD Updateable?
DBSpurg	purge_group_table	

Supplies Management Cost

Database	Table Name	MRD Updateable?
DBScost	cost_trans_descp_lang	
	cost_trans_load	
	cost_supplies_load	
DBSpurg	purge_group_table	

Unit of Measure

Database	Table Name	MRD Updateable?
DBSuomm	unit_of_measure_conversion	Yes
	unit_of_measure	Yes

Appendix D SmartStream Server-to-Server Copy

Appendix Contents

D-1	About SmartStream Server-to-Server Copy
D-3	Setting Up the Target SmartStream File Server
D-7	Setting Up the Target SmartStream Database Server
D-13	Post Server-to-Server Copy Tasks

About SmartStream Server-to-Server Copy

Using the SmartStream Server-to-Server Copy process, you can set up a new database server environment by copying the content of a current database server environment. For example, you might want to set up a test environment that is exactly like your production environment.

Terms

Throughout this appendix, the term *file server* refers to the network file server where SmartStream was installed using the File Server Setup process, and the term *database server* refers to the Sybase Adaptive Server Enterprise (ASE) or Microsoft SQL Server (MSSQL) database server environment.

Restrictions

This process does not apply to any user-defined databases, report specifications, or other customizations residing outside of the delivered SmartStream databases.

The source database server environment must have been installed according to the instructions in the *SmartStream Installation Guide*.

The source database server environment must have only the applications you want in the target database server environment installed in it.

Audience

This appendix is intended only for experienced database administrators who have a detailed working knowledge of Sybase Adaptive Server Enterprise or Microsoft SQL Server database concepts and administration.

Process

The SmartStream Server-to-Server Copy process has the following stages:

Stage	Description
1	Setting up the file server for the new database server environment (target file server).
2	Setting up the new database server environment (target database server).

Setting Up the Target SmartStream File Server

The first stage in the server-to-server copy process is to set up the file server for the new database server environment.

Complete this procedure:

Step	Action
1	<p>Copy your source file server directory to a uniquely named target file server directory (for example, copy the SS80prd directory to the SS80tst directory).</p> <p>Note: If you have installed SmartStream language kits or SmartStream Builder, see the appropriate section following this table.</p>
2	<p>Make the following changes to the dbsinst.ini file residing in the root directory of your BASE (English) target file server:</p> <p>In the COPY section, change the</p> <ul style="list-style-type: none">▪ DESTINATION DIRECTORY setting to point to the target file server▪ ERROR FILE PATH setting to point to the dbsinst.err file residing in the root directory of your target file server. <p>In the LANGUAGE section, change the</p> <ul style="list-style-type: none">▪ EN setting to point to your target file server▪ BASE setting to point to your target file server. <p>Note: A backward slash (\) must be included at the end of these paths, for example, x:\xtnsty\SS80tst\</p> <p>Save and close the dbsinst.ini file</p>

Step	Action
3	<p>Make the following changes to the instenv directory residing in the root directory of your target file server:</p> <p>Find the env.ini file residing in the envx directory corresponding to the source database server (for example, x:\xtnsty\SS80tst\instenv\env0) and</p> <ul style="list-style-type: none">▪ Change the DESCRIPTION setting in the Environment section to a meaningful description of the target environment.▪ Perform a global replacement of the source database server name with the target database server name.▪ Change the JobServer setting in the SYSTEM section by deleting all text to the right of the equal sign (JobServer=)▪ Delete any section beginning with BATCH and followed by a number▪ Save and close the env.ini file. <p>Find the createld.ini file residing in the createld directory under the envx directory corresponding to the source database server (for example, x:\xtnsty\SS80tst\instenv\env0\createld) and</p> <ul style="list-style-type: none">▪ Perform a global replacement of the source database server name with the target database server name.▪ Save and close the createld.ini.
4	<p>Make the following change to the ss directory residing in the root directory of your target file server:</p> <p>Find the dbserver.ini file and</p> <ul style="list-style-type: none">▪ Change the SERVER setting in the DBSERVER section to point to your target database server▪ Save and close the dbserver.ini file.

Language Kits

Complete this procedure for your target language kit file server:

Step	Action
1	Copy your source language kit file server directory to a uniquely named target language kit file server directory (for example, copy the SS80prd.FR directory to the SS80tst.FR directory)
2	<p>Make the following changes to the dbsinst.ini file residing in the root directory of your target language kit file server:</p> <p>In the COPY section, change the</p> <ul style="list-style-type: none"> ▪ DESTINATION DIRECTORY setting to point to the target language kit file server ▪ ERROR FILE PATH setting to point to the dbsinst.err file residing in the root directory of your target language kit file server. <p>In the LANGUAGE section, change the</p> <ul style="list-style-type: none"> ▪ Language setting to point to the your target language kit file server (for example, FR= x:\xtnsty\SS80tst.FR\) ▪ BASE setting to point to your target English file server (for example, FR= x:\xtnsty\SS80tst\). <p>Note: A backward slash (\) must be included at the end of these paths, for example, x:\xtnsty\SS80tst.FR\</p> <p>Save and Close the dbsinst.ini file</p>
3	<p>Make the following change to the ss directory residing in the root directory of your target language kit file server:</p> <p>Find the dbserver.ini file and</p> <ul style="list-style-type: none"> ▪ Change the SERVER setting in the DBSERVER section to point to your target database server ▪ Save and close the dbserver.ini file.
4	<p>Make the following changes to your BASE (English) target file server:</p> <p>Change the language kit line or lines to point to the target language kit file server directory (for example, FR= x:\xtnsty\SS80tst.FR\)</p>

SmartStream Builder

Make the following changes to the dbsinst.ini file residing in the root directory of your target file server:

In the STREAMBUILDER section, change the

- DESTINATION DIRECTORY setting to point to the target file server
- ERROR FILE PATH setting to point to the dbsinst.err file residing in the root directory of your target file server.

Note: A backward slash (\) must be included at the end of these paths, for example, `x:\xtnsty\SS80tst\`

Save and close the dbsinst.ini file.

Setting Up the Target SmartStream Database Server

The next stage in the server-to-server copy process is to set up your target database server environment.

Before You Begin

Verify that the client workstation is set up to perform the database server installation procedures. For more information, see the SmartStream *Installation Guide*.

Sybase Adaptive Server Enterprise

Complete this procedure to set up the new Sybase ASE database server environment:

Step	Action
1	<p>Install a new instance of Sybase ASE.</p> <p>This instance must be identical to the source database server in the following ways:</p> <ul style="list-style-type: none"> ▪ Same operating system and release level ▪ Same release level of Sybase (including the EBFs) ▪ Same auditing option, that is, if auditing (sybsecurity) is turned on for the source database server, then it must also be turned on for the target database server.
2	<p>Ensure that the target server's master database is the same size as the source server's master database and configure Sybase accordingly.</p>
3	<p>Assign a password for the SA user ID on the target database server</p>
4	<p>Run the Database Preparation program (dbsprep.exe) from the utility\dbsprep directory at the root of your target file server.</p>
5	<p>Adjust the Sybase configuration of the target database server to match the configuration of the source database server.</p>
6	<p>Extract the syslogins from the source database server using BCP.</p> <p>For detailed instructions, see the Extracting syslogins from the Source Database Server section following this procedure.</p>
7	<p>Dump the SmartStream databases from your source database server. If you dump to disk, copy the database disk dump files from the source database server UNIX directory to a new UNIX directory (for example, /sybdump/server2).</p> <p>Note: This step is valid only if the operating systems on your source and target database servers are identical and at the same release level, for example, from SUN to SUN or from HP-UX to HP-UX.</p>
8	<p>Insert the syslogins into the target database server using BCP.</p> <p>For detailed instructions, see the Inserting syslogins into the Target Database Server section following this procedure.</p>

Step	Action
9	<p>Create database devices on the target database server for the SmartStream databases.</p> <p>Note: Create devices on the target database server the same way they were created on the source database server, including fragmentation. Use the <code>sysdevices</code> command to get the appropriate device information.</p> <p>For more information about creating database devices, see the Create Database Devices on the Target Database Server section following this procedure.</p>
10	<p>Create databases on the target database server for the SmartStream databases.</p> <p>Note: Create databases on the target database server the same way they were created on the source database server, including fragmentation. Use the <code>sysusages</code>, <code>sysdatabases</code>, and <code>sysdevices</code> commands to get the appropriate database information. Set the following database options for each of the databases:</p> <ul style="list-style-type: none"> ▪ <code>select into</code> ▪ <code>truncate log on checkpoint</code> <p>For more information about creating databases, see the Create Databases on the Target Database Server section following this procedure.</p>
11	<p>Create dump devices on the target database server for the SmartStream databases pointing to the new UNIX directory added in Step 7.</p>
12	<p>Load the databases from the source database server dump files into the target database server databases, and check the <code>backup.log</code> file to confirm that all databases loaded successfully.</p>
13	<p>Run <code>dbtool.exe</code> from the DBMS directory at the root of your target file server.</p>
14	<p>Select your new environment, enter <code>sa</code> and the <code>sa</code> password as your login information, choose the following option, and click Process:</p> <p><i>Sybase versions – Server To Server Copy</i>, where <i>Sybase versions</i> is</p> <ul style="list-style-type: none"> ▪ ASE1600 To ASE1600 if both your source and target database server use Sybase ASE 15.7 <p>This program updates the SmartStream</p> <ul style="list-style-type: none"> ▪ Master database stored procedures ▪ Database server references ▪ ASE updates.
15	<p>Back up all databases. Check the <code>back.log</code> file and run the <code>dbcc</code> checks to confirm that all database were backed up successfully.</p>

Extracting syslogins from the Source Database Server

Complete this procedure:

Step	Action
1	Create a temporary table to store syslogins using the following commands: <pre>select * into tempdb..temp_syslogins from syslogins where name not in ('sa','mon_user','probe') go</pre>
2	Use the BCP command utility to extract the syslogins rows: <pre>bcp tempdb..temp_syslogins out syslogins.bcp -c -bl -Usa -P<sapassword></pre>

Inserting syslogins into the Target Database Server

Complete this procedure:

Step	Action
1	Allow changes to system tables using the following commands: <pre>sp_configure 'allow updates',1 go RECONFIGURE with override go</pre>
2	Use the BCP command utility to insert the syslogins rows: <pre>bcp master..syslogins in syslogins.bcp -c -bl -Usa -P<sapassword></pre>

Create Database Devices on the Target Database Server

Complete this procedure:

Step	Action
1	Using Sybase Central, open the database devices folder.
2	Select all SmartStream database devices.
3	Right-click the selected devices and create the data definition language (DDL).
4	Save the generated DDL to file (for example, SS_devices.sql). Note: You might need to make minor changes to the device creation DDL. Coordinate with your system administrator to ensure that the physical space is available. Tailor the DDL accordingly to create the devices on the Host target server.

Create Databases on the Target Database Server

Complete this procedure:

Step	Action
1	Using Sybase Central, open the database folder.
2	Select all SmartStream database.
3	Right-click the selected databases and create DDL.
4	Save the generated DDL to file (for example, SS_databases.sql). Note: This script should create the databases with the proper fragmentation if the database devices were created correctly.

Microsoft SQL Server 2019

After you set up your target SmartStream file server, use the following special instructions for copying the content of an existing SmartStream database environment to a new environment.

Transferring Logins

According to Microsoft SQL Server Books Online (BOL), the TransferLogins Task in SQL Server Integration Services (SSIS) does not transfer passwords. SSIS transfers only the login ID, and a random password is assigned. This feature requires the database administrator to reset all passwords.

Note: Because the Copy Database Wizard uses the TransferLogins Task, your database administrator must reset all passwords unless you choose to use the following workaround.

To avoid having to change all the passwords, your database administrator can use the Microsoft Stored Procedure, sp_help_revlogin, as outlined in the following Microsoft article: <http://support.microsoft.com/default.aspx?scid=KB;EN-US;246133>

Note: The article contains a copy of the sp_help_revlogin stored procedure with the default database parameter in it. **Do not use it because you have not copied the SmartStream databases yet.**

Transferring Databases

You can use the Copy Database Wizard to transfer databases, but doing so requires updates by the database administrator (see Microsoft SQL Server BOL).

To avoid these changes, you can restore a backup of your source database server to your target database server.

Instance Name Setup

Complete this procedure:

Step	Action
1	Apply the update associated with KB article 1387457 .
2	Run the InstName.exe file in the \DBMS folder on your SmartStream file server.
3	When prompted, enter the instance name for your Microsoft SQL Server installation.
4	When prompted, enter Y to save the change to the instance name in the localsrv.sql file. Result: A localsrv.sql file containing the name of your Microsoft SQL Server instance is created in the \DBMS\ctlgddl directory.

DBtool Configurations

Run the DBtool configurations utility to upgrade SmartStream database objects using this procedure:

Step	Action
1	Run dbtool.exe from the \DBMS directory at the root of the file server image. Result: The SmartStream DB Tool 1.0 application appears.
2	In the Environment Area, choose your SmartStream environment from the drop-down list.
3	In the Database Server Area, enter the sa ID and password.
4	In the Operation Area, choose <i>Microsoft SQL Server versions - Server To Server Copy</i> from the drop-down list, where <i>Microsoft SQL Server versions</i> is <ul style="list-style-type: none"> ▪ MSSQL 2019 To 2019 if both your source and target database server use Microsoft SQL Server 2019
5	Click Process. Result: The settings needed for SmartStream are set on the Microsoft SQL Server database server.
6	Click OK on the DB Tool Success Report window.
7	Click Exit.

Results of Running the DBtool Program

The DBtool program performs the following tasks:

- Sets the database owner to DBS
- Sets metadata visibility to **On**
- Sets all SmartStream databases to current database compatibility level.
- Synchronizes Security Identifiers (SIDs) between the SmartStream databases and syslogins
- Updates database server references within SmartStream databases
- Sets the configuration for Cross Database Chaining as required for the SmartStream databases

Post Server-to-Server Copy Tasks

After you complete the Server-to-Server Copy process, perform the following tasks.

Mail Gateway

Install a Mail Gateway workstation to support your new database server environment. Use the Master Scheduler and Poll Configuration activities to ensure that the new environment is configured to use the new Mail Gateway.

Job Servers

Install and configure ARPC, Master Scheduler, and Polls to support the target database server.

SmartStream Connect

Install SmartStream Connect, if applicable.

Client Workstations

In the dbs.ini file, change all references to the source database server name to the target database server name. Ensure that the location of the dbserver.ini file is correct.

In the dbserver.ini file, change the SERVER setting in the DBSERVER section to point to your target database server. Use the ODBC Data Sources Administrator from the Control Panel to add the ODBC connection information for the target database server.

Test SmartStream by opening up windows and running a SmartStream application report from a Microsoft Access database file (.accdb).

