Infor SmartStream®
Upgrade in Place

Release 8.0
September 2012/Revised June 2026

Publication Information

Release: Infor SmartStream 8.0

Publication date: September 2012/Revised June 2026

Contents

(continued)

1 Overview

Chapter Contents

Before You Begin

Before you can use Upgrade in Place to upgrade from SmartStream 7.0, Service Pack 3 (7.0.03) to SmartStream 8.0:

- Ensure that the installation workstation has the supported version of PC Client for Sybase or Open Client for Microsoft SQL Server installed.
- Ensure that your environment complies with the supported technical environment for SmartStream 8.0.

  For a list of environmental requirements, visit the Knowledge Base on the Infor Concierge to review the 8.0 Supported Technical Environments article (KB1050375).
- Install SmartStream 8.0, including all language kits and SmartStream Builder as applicable, to the file server. See the SmartStream Installation Guide for installation instructions.
- Ensure that your audit user ID and password is configured.

  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 upgrade to SmartStream 8.0 if you do not do this).

  For a list of these prerequisites, review the Installation and Migration Roadmap KB article on the Infor Concierge.
- Read this guide to become familiar with the upgrade process.

- Find all 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 upgrade in place processing.

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

Upgrade in Place Overview

This table presents an overview of the traditional migration process compared with Upgrade in Place.

Migration Step	Traditional Migration	Upgrade In Place
Install File Server	Copies the licensed products from the SmartStream CD or installation image to your SmartStream 8.0 file server	Copies the licensed products from the SmartStream CD or installation image to your SmartStream 8.0 file server
DBSprep (Sybase only)	Ensures certain DBMS settings are in place before installation	Not needed
Database Create	Creates the SmartStream 8.0 databases	Not needed
Database Load	Loads the tables, views, stored procedures, triggers and initial data	Not needed
UDAK (udak.exe)	Customizes tables, views, stored procedures, triggers, data windows and certain platform tables	Runs in special mode with database server not available
UDAK (setup.exe)	Reloads the customized tables, views, stored procedures, and triggers into the databases	Not needed. **Warning: Do not run this program. If you do, you will lose data.**
Migration Export	Generates BCP files for almost every table in the SmartStream 7.0.03 environment	Not needed; automatically creates BCP files for tables that have changed between SmartStream 7.0.03 and SmartStream 8.0
Migration Import	Loads the BCP files generated during export and updates the tables with additional data required by SmartStream	Not needed; automatically generates BCP files, reformats tables, and reimports data for changed tables
UDAK (udak.exe)	Reruns UDAK utility to process architecture tables	Reruns UDAK utility to process architecture tables in special mode
Client Installation	After migration, the SmartStream client workstations must be reinstalled with new SmartStream 8.0 programs	After migration, the SmartStream client workstations must be reinstalled with new SmartStream 8.0 programs

What Is and Is Not Upgraded

This section describes the products and data

- Upgraded using SmartStream automated and manual processes
- Not upgraded using SmartStream-supported processes.

What Is Upgraded

Upgrade in Place handles all SmartStream databases.

What Is Not Upgraded

Upgrade in Place does not upgrade

- Non-SmartStream databases and their associated data and objects (stored procedures, triggers, views, and tables)
- Non-SmartStream data and objects that are stored in SmartStream databases
- Databases and their associated data and objects that were built using SmartStream Builder.

Maintaining Data Integrity

Maintaining data integrity while upgrading to SmartStream 8.0 is critical.

Recommendations

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

- Prepare your server environments before upgrading data; for more information, see Chapter 2, Preparing for Upgrade
- Back up your current SmartStream environment (SmartStream 7.0.03)
  - Database server
  - Job server
  - File server
- Ensure that no one is working in your current SmartStream environment during the upgrade process
- Ensure that you have successfully upgraded your environment to SmartStream 8.0 before putting the server back into production.

Variables That Affect Upgrade Time

The time required to upgrade a SmartStream environment varies depending on the following characteristics of your enterprise:

- Computing and networking capabilities
- Licensed products
- Tailored features, such as user-defined accounting key and language kits
- Database variables, such as the size of tables.

2 Preparing for Upgrade

Chapter Contents

About Preparing for Upgrade

This chapter describes how to prepare your environments to upgrade to SmartStream 8.0.

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

Process Overview

This table describes the process for preparing to upgrade your SmartStream products and data.

Stage	Description
1	Access the Infor Concierge for the latest upgrade information and apply all appropriate update deliverables (service packs, cumulative updates, and individual updates) for SmartStream 7.0.03.
2	Prepare the upgrade environment.
3	Prepare the SmartStream server environments.
4	Establish connectivity to the servers and DBMS.

Using the Infor Concierge

The Infor Concierge contains the latest SmartStream upgrade information, if any. Before starting the upgrade process:

- In the Knowledge Base on the Infor Concierge, review the following topics:
  - Critical Issues
  - Installation and Migration Roadmap
- Apply update deliverables from individual KB articles, as required, to your SmartStream 8.0 environment.

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

Preparing the Upgrade Environment

SmartStream 8.0 File Server

Before you can upgrade your SmartStream 7.0.03 environment to SmartStream 8.0, you must create a SmartStream 8.0 file server that will hold all the objects required for your licensed products. For more information, see the SmartStream *Installation Guide*.

After the SmartStream 8.0 file server is in place, perform the following tasks.

- Copy the InstEnv directory from your SmartStream 7.0.03 file server to your new SmartStream 8.0 file server. Be sure to copy all files and subdirectories contained in the InstEnv directory. Next, remove the upgrade directory from the InstEnv\Env*x* directory on your SmartStream 8.0 file server, if applicable. If you fail to remove this directory before you run the upgrade process, the upgrade program detects it, sends the message that the upgrade process has been completed, and stops the process.
- Change the dbserver.ini file in the SmartStream directory of your SmartStream 8.0 file server by updating this entry with the name of your database server:

```
[DBSERVER]
Server=
```

Apply Update Deliverables from KB articles

The Knowledge Base on the Infor Infor Concierge contains the latest upgrade information. Before proceeding with the upgrade process, review the Critical Issues and Installation and Migration Roadmap KB articles on the Infor Concierge, and download update deliverables from required KB articles. Apply these update deliverables in **fso** mode.

Upgrade Workstation

Perform the upgrade from a workstation running Windows that conforms to the supported technical environments specification for SmartStream 8.0 found on the Infor Concierge.

Exported File Location

Data contained in tables that have changed for SmartStream 8.0 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. Appendix A, Table Changes, identifies the tables that contain data to be extracted.

Preparing the Database Server Environments

Complete this task to set up your database server before beginning the upgrade process.

Required Information

☐ Gather the following information for your SmartStream 7.0.03 environment:

- Server name
- Server Internet Protocol (IP) address
- System administrator or database owner password

Establishing Connectivity

Complete the following tasks to establish connectivity.

DBMS Connectivity

☐ Verify that the workstation used to perform the upgrade 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 (64-bit version).
Microsoft SQL Server	Microsoft Open Client

☐ Ensure that available log space is maximized in your SmartStream 7.0.03 environment using the following commands:

Use this command…	To…
Dump database db_name	Back up both the database and its transaction log.
Dump database db_name with no_log	Clear the log of the completed transactions.

Troubleshooting the Connection

If your 7.0.03 DBMS is…	Then check the…
Sybase Adaptive Server running on a Microsoft Windows server	Dsedit utility on the upgrade workstation.

Read and Write Privileges

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

Reinstalling SmartStream Client on the Upgrade Workstation

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

3 Tailoring Your Accounting Key

Chapter Contents

About Tailoring Your Accounting Key

This chapter describes how to tailor your accounting key for your SmartStream 8.0 environment. You must perform these tasks before upgrading your data so that your SmartStream 8.0 tables, views, stored procedures, and triggers are loaded successfully.

Considerations for Tailoring Your Accounting Key

Tailor your accounting key for SmartStream 8.0 if your accounting key was tailored in your SmartStream 7.0.03 environment.

Warning: You cannot change your accounting key during the upgrade process.

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 do not load the language kits, errors occur when you tailor your accounting key.

- ☐ Ensure that the workstation running the User-Defined Accounting Key program has the SmartStream 8.0 client installed.

- ☐ Ensure that the workstation you are using to run the User-Defined Accounting Key program has the correct version of PowerBuilder installed (See the **Supported Technical Environments** for your release).

Process Overview

This table describes the process of applying your SmartStream accounting key to SmartStream 8.0.

Stage	Description
1	Copy the udak.ini file from your SmartStream 7.0.03 file server to your SmartStream 8.0 file server.
2	Tailor your accounting key for your SmartStream 8.0 environment.
3	Regenerate your dynamic run-time library (.pbd) file.

Copying the Current udak.ini File

This table tells you how to copy the udak.ini file from your SmartStream 7.0.03 environment to your SmartStream 8.0 file server.

Copy udak.ini from this directory...	To this directory...
*drive:**directory***dbms\udak** Where: ▪ *drive* is the drive where SmartStream 7.0.03 is installed ▪ *directory* is the directory where SmartStream 7.0.03 files reside	*drive:**directory***dbms\udak** Where: ▪ *drive* is the drive where SmartStream 8.0 is installed ▪ *directory* 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

Note: The udak.ini file must not identify a product as having a tailored accounting key if the accounting key was not tailored for it on the database server.

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	Not Available - Only CD to file server completed.
Run Mode	Special - Process the following classes of objects: DataWindows, Scripts.

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.

Warning: Do not run dbms\udak\setup.exe (Compile User-Defined Accounting Key program) even if the udak.log file instructs you to run it. **You will lose data if you do.**

Building the 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 **\ss** 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 **\ss** 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.

Step	Action
13	Complete the settings as follows and click OK: ▪ Clear the Machine Code check box if checked ▪ Select FULL as the build type ▪ Leave Resource Filename blank
14	At the Replace existing *path*/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 a udak.dll instead of a 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 of 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*.

4 Upgrading Your Database Server

Chapter Contents

About Upgrading Your Database Server

This chapter describes the Upgrade process and how to run it.

Upgrade Process

SmartStream Upgrade in Place

- Loads SmartStream 8.0 views, stored procedures, and triggers
- Loads additional data required by SmartStream 8.0
- Exports data into .bcp files for tables that have changed
- Reformats tables that have changed into the SmartStream 8.0 structure
- Imports data for tables that have changed into the SmartStream 8.0 table structure.

Running the SmartStream Upgrade Program

Run **\dbms\upgrade\setup.exe** to upgrade a SmartStream database server from SmartStream 7.0.03 to SmartStream 8.0.

Microsoft SQL Server Considerations

To prepare the Microsoft SQL Server database server to work with SmartStream, complete 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 window 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 **Microsoft SQL Server** *version* **- Upgrade** from the drop-down list, where *version* is your version of Microsoft SQL Server.
5	Click Process. **Result:** The settings needed for SmartStream are set up on the Microsoft SQL Server database server.
6	Click OK on the DB Tool Success Report window.
7	Click Exit.

Illustrated Procedure

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

5 Post-Upgrade Tasks

Chapter Contents

About Post-Upgrade Tasks

You perform several tasks after running SmartStream Upgrade in Place to

- Verify that the program exported and imported data for tables that changed accurately and completely
- Load Language Kit data
- Load any new products that have been licensed
- Finish tailoring your accounting key
- Reinstall client, Job Server, and Mail Gateway software.

The Upgrade in Place process is not complete until these tasks are completed.

Using Files Generated by the Upgrade Process

The Upgrade in Place process generated the following types of files:

- Error
- Output
- Restart

File Location

Files generated by the Upgrade in Place process are stored in the *drive*:*directory***instenv\env***x****upgrade** directory on your SmartStream 8.0 file server, where *x* = 0, 1, 2, 3, and so on.

Error Files

The Upgrade in Place process generates error files (.err) when errors occur. Diagnose the problem and correct the error before continuing the Upgrade in Place process.

Output Files

Output files (.out) contain a record for the Upgrade in Place process of

- Errors that occurred during processing
- Operations executed by the process.

Table Rows

Each output file displays the number of rows for each database table exported and imported during the upgrade process.

Restart Files

When an error occurs during the Upgrade in Place process, a restart file (.rst) is generated. This file identifies where to resume the Upgrade in Place process after you correct the error.

Warning: Do not delete these files.

Reload Language Kits

If you licensed language kits for SmartStream 8.0, reload the language kits (for all products) to the database server after you run the Upgrade in Place process but before you finish tailoring your accounting key.

Illustrated Procedure

To see a procedure for reloading language kits 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*.

Load New Products

If you licensed new products with SmartStream 8.0, load them after the upgrade.

Warning: Do not load education data.

For information about how to install new products, see the SmartStream *Installation Guide*.

Finish Tailoring Your Accounting Key

After the Upgrade in Place 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

You choose specific options when you run the User-Defined Accounting Key program to finish tailoring your accounting key. These options are as follows:

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.

Post-Upgrade Tasks for SmartStream Products

The following sections discuss tasks you must complete after Upgrade in Place processing.

SmartStream Client

After upgrading your database server to SmartStream 8.0, SmartStream client software must be installed again on any workstation currently running SmartStream 7.0.03.

Warning: Attempting to access SmartStream 8.0 data with a SmartStream 7.0.03 client causes errors.

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.

SmartStream Mail Gateway

After upgrading your database server to SmartStream 8.0, mail gateway software must be installed again on any existing SmartStream 7.0.03 mail gateway.

For information about how to install mail gateway software, see the SmartStream *Installation Guide*.

SmartStream Job Server

If you have not already done so, reinstall your SmartStream Job Servers from the SmartStream 8.0 file 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 prpcencc.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 prpcencc.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 to10 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..jrnl_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 RTRIM(first_name) + ' ' + RTRIM(last_name) from DBSwact..user_master_1 um where
um.user_id = l.user_or_grp_id)
       WHEN '2' THEN  (select RTRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id =
l.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 RTRIM(first_name) + ' ' + RTRIM(last_name) from DBSwact..user_master_1 um where
um.user_id = l.user_or_grp_id)
       WHEN '2' THEN  (select RTRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id =
l.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_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_acct l
INNER JOIN DBSwact..activity_master_1 am
on l.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 RTRIM(first_name) + ' ' + RTRIM(last_name) from DBSwact..user_master_1 um where
um.user_id = l.user_or_grp_id)
       WHEN '2' THEN  (select RTRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id =
l.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 RTRIM(first_name) + ' ' + RTRIM(last_name) from DBSwact..user_master_1 um where
um.user_id = l.user_or_grp_id)
       WHEN '2' THEN  (select RTRIM(sec_group_desc) from DBSwact..sec_group_master where sec_group_id =
l.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 DBSjepc..jrnl_post_entity_scrty l
INNER JOIN DBSwact..activity_master_1 am
on l.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 the following 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 the following 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
ffcfcblcad	Archive Fund Balance to Disk
ffcfcblcah	Archive Fund Balance to History
ffcfcbldad	Archive Fund Balance History to Disk
ffcfctxcad	Archive Fund Transactions to Disk
ffcfctxcah	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 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	Define data security appropriate for the data being loaded. Security for subledger documents is no longer used for this program. ▪ 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. ▪ 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 .lvl file to trigger debugging instead.
Funds Control Journal Creation (ffcc0900)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvl file to trigger debugging instead.
Fund Transaction Upload (ffcc1100)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvl file to trigger debugging instead.
Funds Control Year End (ffcc2000)	Required	Change input parameters to remove the debug parameter as needed. Use the .lvl 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 (pscc0070)	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.

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 this procedure:

Step	Action
1	Give the security administrator authority to administer security for the following new activities using the Security Administrator activity:

Activity ID	Name
fgl0700	Ledger Security Data Control

Step	Action
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.

Verify the Upgrade Process

You can verify that data updated successfully using

- Output files
- Reports
- Activities.

Using Output Files

Review output files each time you run the Upgrade in Place process to verify that no errors occurred and all data processed.

Compare the number of rows exported with the number of rows imported for each table that changed between SmartStream 7.0.03 and SmartStream 8.0. If they do not match, the data might not have been updated successfully.

Using Reports

Generate reports in your SmartStream 7.0.03 and SmartStream 8.0 environments. Compare the output to ensure that the reports match.

If they do not match, the data might not have been updated successfully.

Using this table, determine which of these reports to use to help verify the success of your upgrade.

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

Using Activities

If you upgraded a test server, run activities in your SmartStream 7.0.03 and your SmartStream 8.0 environments. When the activities have completed, check that the results are the same.

If they do not match, the data might not have updated successfully.

Note: This test is valid only if both environments contain the same data.

Adding Security

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

Activities to Use

Using this table, determine the activities to use to help verify the success of your upgrade.

Product	Activity
Asset Management	Asset Category Tables
	Asset Entity Policy
	Asset Location Tables
	Assets
Common 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

Appendix A Table Changes

Appendix Contents

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 have changed between SmartStream 7.0.03 and the latest SmartStream release and might require data migration.

Data Migration

Data is not migrated for a changed table if any of the following changes are the only changes that were made to it:

- An index was changed
- A column was altered to increase its size
- A new column was added to the end of the table using Alter Table SQL

Whether data for a changed table is migrated is noted in the Migrate column of the tables listing changed tables. This column contains either of these values:

- Yes - Data in this table is migrated.
- No - Data in this table is **not** migrated.

Archive/Purge Considerations

If we recommend archiving and purging data from a table before running the Upgrade in Place process to reduce the time required to complete upgrade 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 the Upgrade in Place process

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

SmartStream

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
ctlgddl	DBSctlg	scit	sp_cum_ind_tbl	No	
wact	DBSwact	loga	logon_audit	Yes	
		sgpm	sec_group_master	Yes	
		stpw	server_temp_password	Yes	
		usrp	user_password	Yes	
		wlog	win_logins	Yes	
		scpo	security_policy	No	
		usmm	user_master_1	Yes	
pscb	DBSpscb	pscd	psc_security_detail	Yes	
arpc	DBSarpc	acfg	arpc_config	No	
osst	DBSosst	mpec	mpc_extract_criteria		
		msec	mpc_structure_extract_criteria		

Shared Components

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
entp	DBSentp	btch	batch_parameters	Yes	
		lena	entp_ldr_policy_audit	Yes	
		lenp	entp_ldr_policy	Yes	
		aena	entp_ast_policy_audit	Yes	
		aenp	entp_ast_policy	Yes	
		gena	entp_general_policy_audit	Yes	
		genp	entp_general_policy	Yes	
		pena	entp_payable_policy_audit	No	

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
		penp	entp_payable_policy	No	
vmst	DBSvmst	vnbt	vendor_trans	Yes	
vpur	DBSvpur	vpur	vendor_loc_purchasing	No	

Asset Management

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
fast	DBSfast	flse	ast_lease	Yes	
fwrk	DBSfwrk	fgsq	work_generated_sql	No	
		frpt	work_report_process_controller	Yes	

Funds Control

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
fund	DBSfund	fctx	fund_transactions	No	
		fcxa	fund_transactions_audit	No	
		fcwk	fund_checking_work	No	
fwrk	DBSfwrk	fgsq	work_generated_sql	No	
		frpt	work_report_process_controller	Yes	

Ledger

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
glep	DBSglep	gccw	ldr_comb_checking_work	No	
		gcsd	sync_coa_with_struct_rqst_dtl	Yes	
		gcsr	sync_coa_with_struct_rqst	Yes	
		gida	ldr_intraentity_rule_dtl_audit	No	
		gird	ldr_intraentity_rule_dtl	No	
		gjgl	jrnl_transl_audit_glep_lines	No	
		gjta	jrnl_transl_audit	No	
		glaa	ldr_acct_maint_audit	No	
		glba	ldr_acct_bal_maint_audit	No	
		glep	ldr_entity_policy	Yes	
		gljt	ldr_transl_controls_rules_work	No	

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
		gls1	ldr_scrty_entity	Yes	
		gls2	ldr_scrty_acct	Yes	
		gls3	ldr_scrty_acct_bal	Yes	
		glwj	ldr_work_jrnl_lines	No	
		glwo	ldr_work_offset_jrnl_lines	No	
		jeul	unposted_jrnl_line	No	
		jewl	work_unposted_summ_jrnl_line	No	
		lepa	ldr_entity_policy_audit	Yes	
		glpr	ldr_posting_rqst	No	
		glrp	process_run	No	
		gls1	ldr_scrty_entity	Yes	
		gls2	ldr_scrty_acct	Yes	
		gls3	ldr_scrty_acct_bal	Yes	
		gmbe	mpc_bud_extract_criteria	Yes	
		gmec	mpc_bal_extract_criteria	Yes	
		mbew	mpc_bal_extract_work	Yes	
		mpci	mpc_integration	Yes	
		wlpd	work_ldr_pds_PM_EIF_SS	No	
jepc	DBSjepc	jes1	jrnl_post_entity_scrty	Yes	
		jea2	posted_jrnl_line_archive	No	
		jedl	del_jrnl_line_audit	No	
		jepl	posted_jrnl_line	No	

Payables

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
prqt	DBSprqt	prqr	pmt_rqst_archive	No	
		prqt	pmt_rqst	No	
pymt	DBSpymt	pypl	pmt_temp_print_log	Yes	
		ptbw	pmt_trial_balance_work	No	

Payroll

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
hrpa	DBShrpa	hcpt	emp_pmt_canadian_prov_tx_dtl	No	
		hpft	emp_pmt_us_federal_tax_detail	No	
hrpy	DBShrpy	hetc	empl_us_tax_reconciliation	No	
		hcpt	emp_pmt_canadian_prov_tx_dtl	No	
		hcva	emp_can_provincial_tax_accum	No	
		hpfa	emp_us_federal_tax_accum	No	
		hpft	emp_pmt_us_federal_tax_detail	No	

Personnel

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
hrpn	DBShrpn	heeo	eeo_reporting_establishment	No	
		hpin	emp_pin	No	
		hag1	emp_property_aud	No	
		hect	emp_can_tax_authority	No	
		hpta	emp_us_tax_authority	No	
		hptt	empl_tax_entity_us_tax_auth	No	
		hpux	us_tax_authority	No	
		httd	tax_type_descp	No	
		htxt	tax_type	No	
		au73	empl_tax_ent_us_tax_auth_aud	No	
		hrpd	ben_plan_grp	No	
		hrpq	ben_administer_event	No	
		hwed	work_sqr_emp_data	No	
		hwer	work_sqr_emp_roe	No	
		hw1d	work_sqr_1099_dist	No	
		hipr	individual_personal	No	
		hroe	emp_roe	No	
hrac	DBShrac	hvap	work_vets_100A_parent_company	No	
		hvah	work_vets_100A_hiring_location	No	
		hveh	work_vets_100_hiring_location	No	
		hvep	work_vets_100_parent_company	No	
		hver	work_vets_100_report_extract	No	

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
		heep	work_eeo_1_eeoc_output	No	
		heou	work_eeo_4_eeoc_output	No	
		hpd1	work_eeo1_epdr_report_output_1	No	
		hpd2	work_eeo1_epdr_report_output_2	No	
		hpd3	work_eeo1_epdr_report_output_3	No	
		hpd4	work_eeo1_epdr_consolidation	No	
		hpd5	work_eeo1_epdr_extract	No	
		hpd6	work_eeo1_epdr_establishment	No	
		her1	work_epr_report_output_1	No	
		her3	work_epr_report_output_3	No	
		her4	work_epr_extract	No	

Purchasing

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
reqm	DBSreqm	rpow	req_to_po_conv_work	No	
		rqpw	req_to_po_fc_work	No	
puen	DBSpuen	pobt	purchase_order_trans	No	

Receivables

Table Family	Database	Table ID	Table Name	Migrate	Recommended Purge Process
rrcv	DBSrrcv	rrs2	recv_entity_security_ctrl_alt	No	
		rws2	recv_entity_wr_off_scrty_alt	No	

Supplies Management

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

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_lables
		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
mesm	DBSCOMMON	emap	esb_element_mapping
		esba	esb_expression
		esbb	esb_request

Table Family	Database	Table ID	Table Name
		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

Table Family	Database	Table ID	Table Name
		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	jrnl_transl_accrl_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	DBSjepc	gfec	fichier_ecritures_comptables
		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

Table Family	Database	Table ID	Table Name
		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

Chapter 5 Post-Upgrade Tasks

Appendix A Table Changes

About This Guide

Introduction

The SmartStream® Upgrade in Place guide from Infor describes how to

- Prepare your SmartStream 7.0 Service Pack 3 (7.0.03) environment for SmartStream 8.0
- Upgrade your environment
- Verify that your environment upgraded successfully.

Audience

Users responsible for implementing and maintaining their SmartStream environments are the intended audience for this guide.

Prerequisites

You must be familiar with the following products to upgrade SmartStream:

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

Conventions

The check box to the left of text (☐) identifies a task you complete during the upgrade in place process.