

PEOPLESOFT MASS CHANGE

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MASS CHANGE: VAUGHN MARTIN

DT

6-3

331lbs

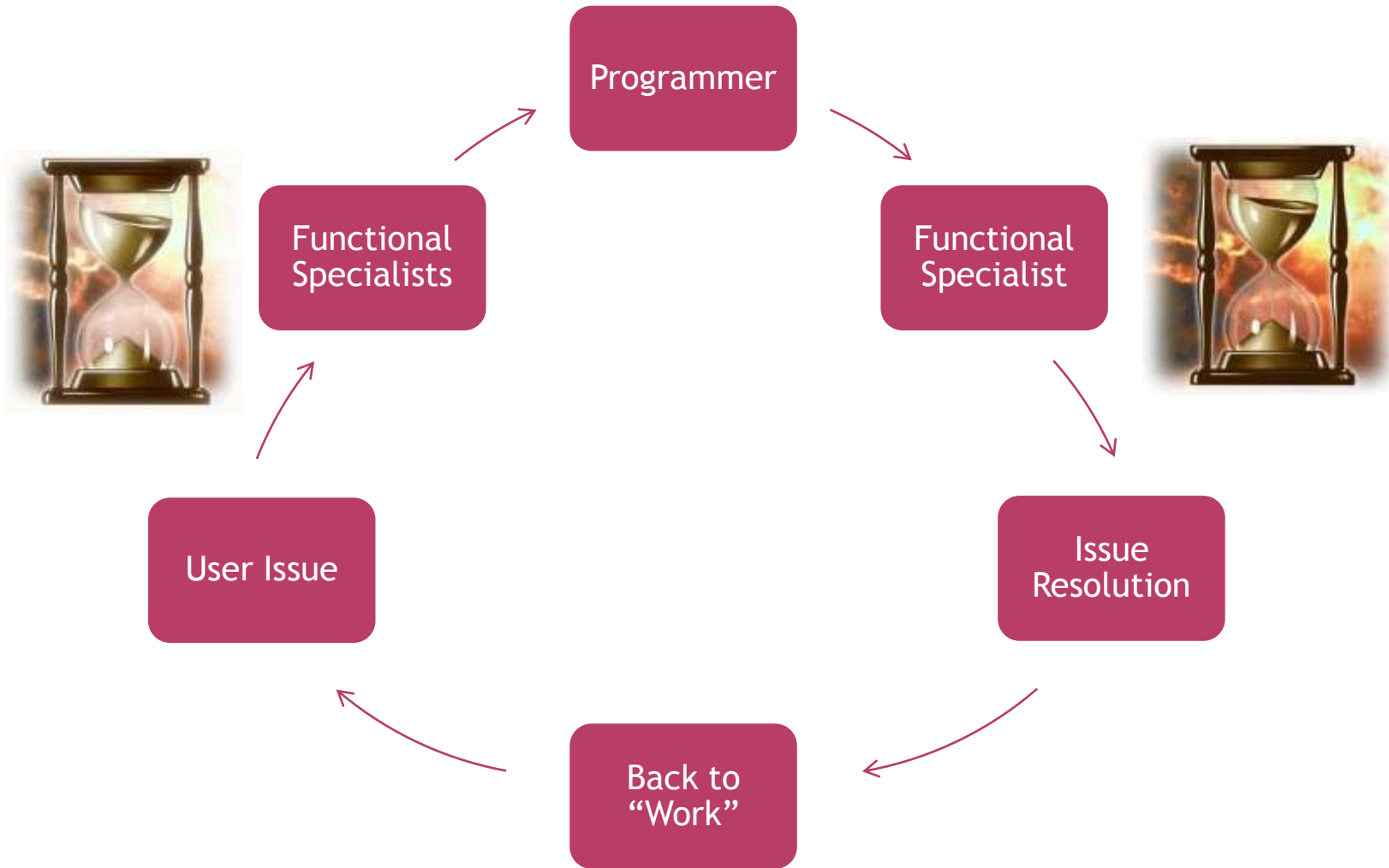
University of Western Ontario



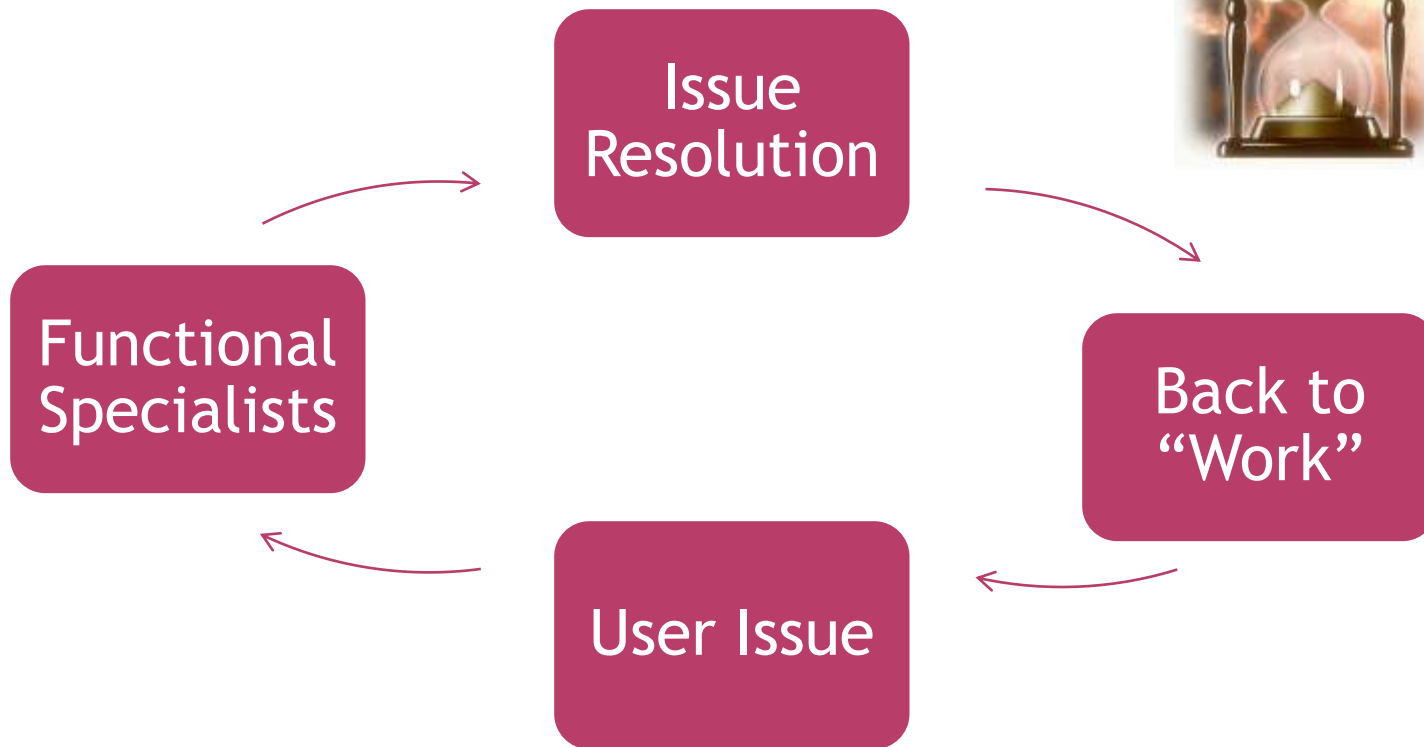
SUMMARY

“ University of Western Ontario Financial Services uses a simple but very effective PeopleSoft tool called the Mass Change to reduce SQL requests. Creating standardized templates for recurring issues has saved a great deal of time for both functional and technical staff. Advanced Functional users can effectively run standard SQLs to specific records in a controlled fashion.”

SQL REQUEST CYCLE



MASS CHANGE CYCLE



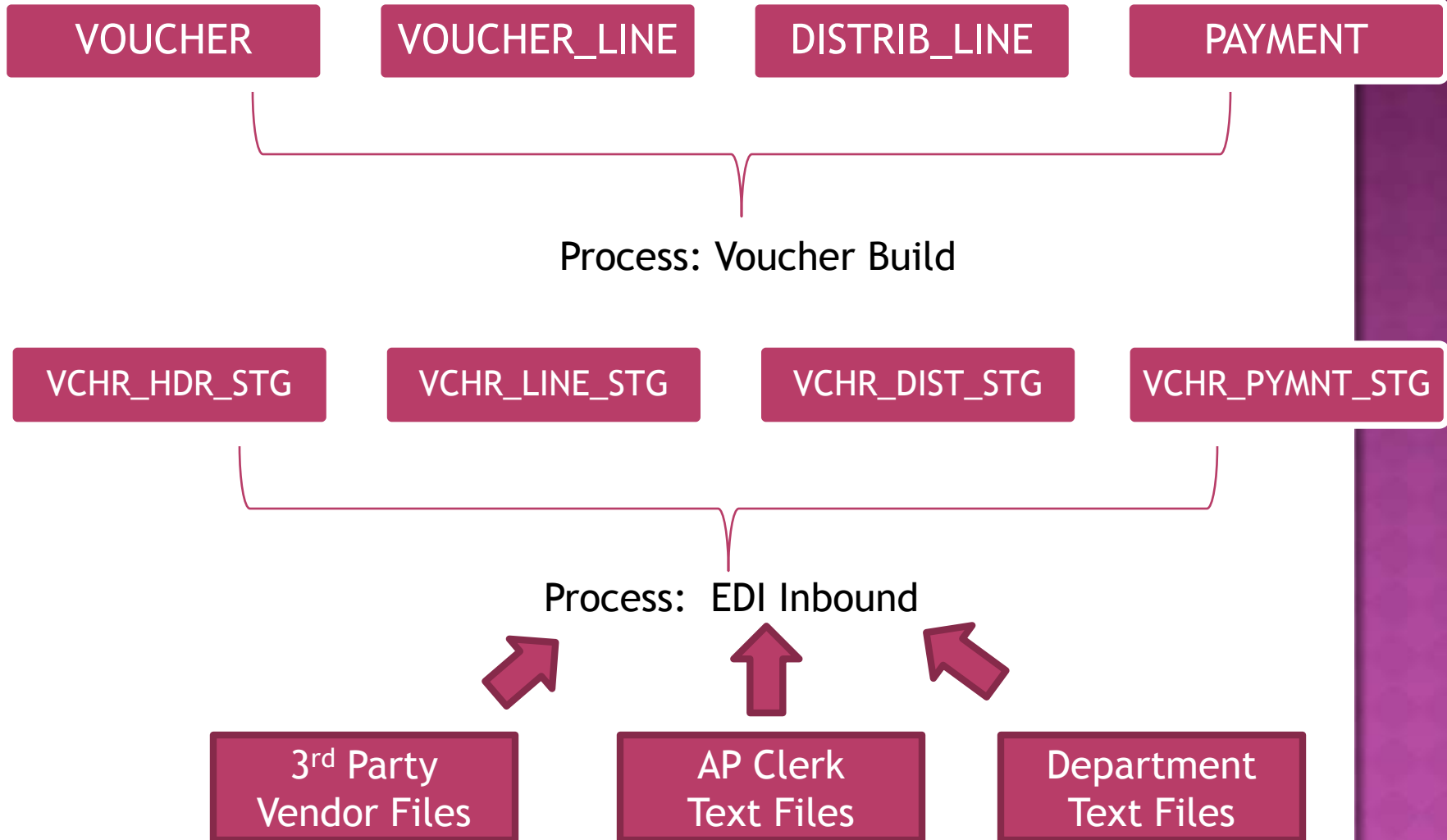
BENEFITS

- ⦿ Increased speed of resolution
- ⦿ Less Staff disrupted by issue Resolution
- ⦿ Less expertise required to resolve issue
- ⦿ Less Dependence on specific staff

WHAT IS MASS CHANGE

- ◉ Delivered as a Tool for Adhoc requirements
- ◉ Specific Modules have Delivered Templates
 - Asset Management
 - Order Management
 - Accounts Receivable
 - Billing
 - PeopleTools - Mass Change the Mass Change
- ◉ Make Your Own

AP VOUCHER PROCESS



TYPE

- Specify Records
- Specify SQL Action
 - Delete, Insert, Select, Select Distinct, Sub Select, Select Sum, Update
- Specify Sequence
 - Order in which SQL command is written
- Join Fields Option
- Additional Where Clause

PROMPT RECORDS

- Not Required
 - Technical User Advantage
- Provides a list of available values to be used as criteria.
 - Query View records may need to be created to achieve this.
 - Functional User Advantage/Security

BUILDING MASS CHANGE

1. Types
 - Record & SQL Action

2. Prompt Records
 - Limits & Controls Selected Values

3. Template Record & Field

4. Definition Record & Field
 - Combines Type, Prompt Records, & Template to build and perform SQL Online

TEMPLATE

◉ Description Page

- Links the Type to the Template
- Other information

◉ Criteria & Fields

- Specifies the Criteria Fields we are “Mass Changing” around (VCHR_BLD_KEY_N1)
- Default Fields???

DEFINITION

- ◉ **Description Page**
 - Matches Definition to Template (and type)
- ◉ **Criteria & Defaults**
 - User enters values based on Template
- ◉ **Tool Specific Fields**
- ◉ **Generate SQL**
 - Clear Sw
 - Generate
 - Count
 - Execute Box

EXECUTION

- **Generate SQL**
 - Clear Sw
 - Generate
 - Count
 - Execute Box

- **Execution History**



BE CAREFUL

- Replicate Issue in Development & Test
- Rollout to Qualified Staff
- Consider Nature/Risks of effected Area

OTHER OPTIONS

○ Mass Change Group

- Multiple Definitions can be run together using one Run Control
- Not used at UWO

○ Process Mass Changes

- Runs Mass Change with the process scheduler using an application SQR
- Not used at UWO

SECURITY

- The user can only use Mass Change Templates assigned to their primary permission list.
- Users may share primary permission lists, review will be required.
- Talk to your Security Specialist.

Q & A

