# Upgrade PESChanges

# White Paper

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## Introduction

This document describes the data migration process for the deprecated PESChanges features, which used to display a changes log in your vendor bank account forms:



To see vendor / bank account changes, please use our vendor history log, configurable in Parameters, available in all eftsure menus, and as a data entity for audit purposes.

These features will be deprecated in v1535.

**Note:** Please ensure your end users have access to vendor history if needed

## Upgrade Error

During the standard upgrade, a new batch will be spawned and fail until PESChanges upgrade completes successfully:



The batch will fail will the following error, alerting the key user to perform the update:

A **Upgrade PESChanges** button is available to help alongside the warning description. Click **Upgrade PESChanges** to get to the matching data upgrade batch.

Once the upgrade has completed, the version update script will be cleared of all warnings and actions.

Our out of the box upgrade framework is used for all upgrades including this process. It will generate batches in the **eftsure upgrade** monitoring category that can be monitored directly in Workspace > Admin > Upgrades > Batches (and Details).

The upgrade is considered successful once all upgrade tasks have completed successfully.

If an error can't be resolved:

Check with key user,

Try to manually edit the bank account causing issue before retrying

Select the failing batch and hit the support icon as per the image below:

# Vendor History Log configuration

To perform the optional data migration of PESChanges into Vendor history log, we recommend enabling vendor history first:
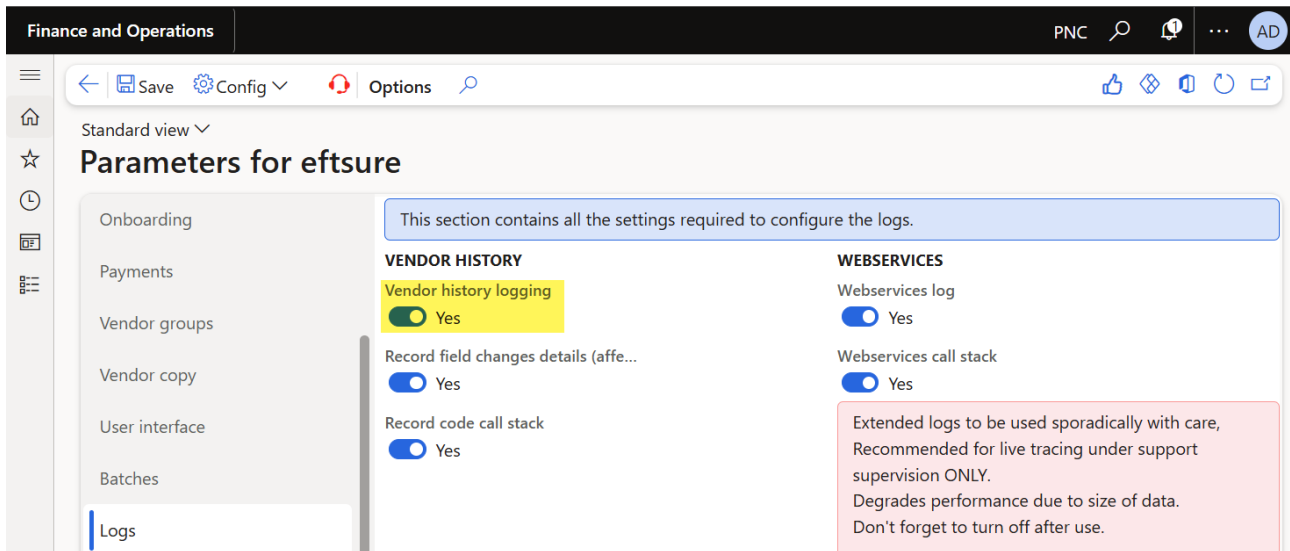


Other parameters are optional and recommended to be turned off.

If Vendor history log is turned off during the Upgrade, the deprecated data will be lost.

# Vendor History Log

When enabled, the vendor history log is available:

In eftsure workspace > Dashboard > Vendors > History to access data for all vendor changes.

In our eftsure menu for any specific vendor or bank account:
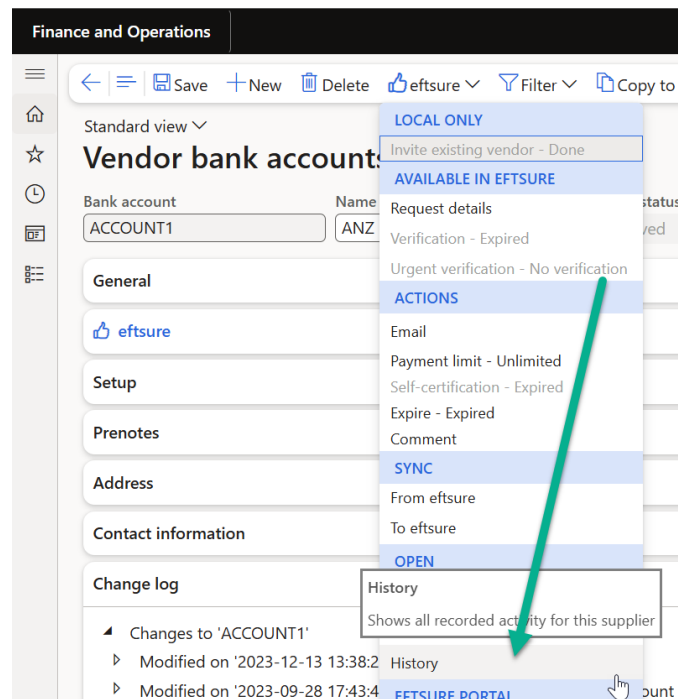
## Data Upgrade

For environments with vendor history log running, the data should already be available in the vendor history log, no need for data migration, you can run the data migration job to clear data without migration of PESChanges data into Vendor History Log.



For environments without vendor history log configured, if you wish to use a similar process, we recommend migrating and clearing data.

First turn on Vendor history logging, then run the following:



## Parameters

The following parameters are available in the upgrade job:



**Enable vendor history:**

Turn on Vendor History logs with default settings (Callstack disabled)

This option is only available if vendor history logs is disabled

**Entities:**

This batch needs to run once per enabled legal entity, once per data sharing policy (if cross company data sharing).

We recommend running each batches one after another to avoid performance issues, deadlock and conflicts. Using the Entities combobox, either schedule X batches with current entity or schedule 1 batch will all enabled entities.

**Migrate data from PESChanges:**

Use deprecated history from VendBankAccount.PESChanges to generate upgraded data compatible with vendor history log.

**Clear PESChanges after upgrade:**

Clear VendBankAccount.PESChanges after processing records. This action is irreversible.

## Monitoring progress

The new batch(es) for this upgrade will appear in Workspace > Admin > Upgrades > Batches.

Monitor all infolog messages and ensure each batch completes. Batches can fail due to deadlocks or conflicts and may require massaging.

Depending on the amount of data, this process can take a long time.

## Completing upgrade

Once all obsolete data has been cleared, you can now retry the upgrade batch which should complete successfully.

You can restart the failed batch using the status button to set batch status to Waiting.

Once the upgrade batch job for version 1535 has completed, you can proceed with the next upgrade task.

## Demonstration

The following sample run demonstrates how to run this process correctly. It starts after the configuration of cross company data sharing and enabling vendor history log.

This scenario has the following legal entities : PNC, PNT, PUK, PDS, PNS, where PUK, PDS, PNS are shared via CCDS Policy 'Vendor Master Data'. The data fix should therefore run in PNC, PNT and in one of PUK, PDS, PNS

For all runs, we'll be running with all default options enabled.

First, the standard upgrade fails and provides a link to run the upgrade in each legal entity:

| | Status | Job description | Actual start date/time | End date/time | Company | : |
|---|---|---|---|---|---|---|
| ○ | Error | Upgrade 1534 => 2000 | 25/07/2025 12:34:04 PM | 25/07/2025 12:34:22 PM | PUK | A |

| VersionUpdate 1535 VendBankAccounts PESChanges > | For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges | 🅿 Open |
|---|---|---|
| VersionUpdate 1535 VendBankAccounts PESChanges > | Before retrying, please run Upgrade PESChanges upgrade in [PDS, PNC, PNS, PNT, PUK] | 🔲 Upgrade PESChanges |
| VersionUpdate 1535 VendBankAccounts PESChanges > | Duration 00:00:00.1 | |
| Batch task failed: VersionUpdate 1535 VendBankAccounts PESChanges > | Before retrying, please run Upgrade PESChanges upgrade in [PDS, PNC, PNS, PNT, PUK] | |

## Per entity

We run the upgrade in all entities, one after another:

In PUK:

| | Status | Job description | Actual start date/time | End date/time | Company | Cre : |
|---|---|---|---|---|---|---|
| ○ | Ended | Upgrade PESChanges - PUK - P... | 25/07/2025 12:35:10 PM | 25/07/2025 12:35:22 PM | PUK | Admi |

| Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > | For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges | 🅿 Open |
|---|---|---|
| Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > | Vendor history enabled with default settings | 🔲 Show |
| Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > | 714 vendor history record(s) created | |
| Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > | Cleared PESChanges from 96 record(s) | |
| Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > | Processed through 99 record(s) | |
| Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > | PESChanges upgrade already completed in PUK. Remaining entities to clear: PNC, PNT | |

In PNC:

| | Status | Job description | Actual start date/time | End date/time | Company | Cre : |
|---|---|---|---|---|---|---|
| ○ | Ended | Upgrade PESChanges - PNC | 25/07/2025 12:35:53 PM | 25/07/2025 12:37:11 PM | PNC | Admi |

| Upgrade PESChanges - PNC > | For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges | 🅿 Open |
|---|---|---|
| Upgrade PESChanges - PNC > | 16465 vendor history record(s) created | |
| Upgrade PESChanges - PNC > | Cleared PESChanges from 948 record(s) | |
| Upgrade PESChanges - PNC > | Processed through 948 record(s) | |
| Upgrade PESChanges - PNC > | PESChanges upgrade already completed in PNC. Remaining entities to clear: PNT | |

In PNT:

| | Status | Job description | Actual start date/time | End date/time | Company | Cre |
|---|---|---|---|---|---|---|
| ○ | Ended | Upgrade PESChanges - PNT | 25/07/2025 12:35:32 PM | 25/07/2025 12:40:25 PM | PNT | Admi |

Upgrade PESChanges - PNT >  For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges

Upgrade PESChanges - PNT >  Vendor history enabled with default settings

Upgrade PESChanges - PNT >  37271 vendor history record(s) created

Upgrade PESChanges - PNT >  Cleared PESChanges from 296 record(s)

Upgrade PESChanges - PNT >  Processed through 297 record(s)

Upgrade PESChanges - PNT >  PESChanges upgrade already completed in PNT. Remaining entities to clear: None

Once all upgrades have completed, the last batch confirms all enabled legal entities have been processed successfully.

Return to the failed upgrade batch, change status back to Waiting:



After completion, a second batch job history completes successfully and confirms all upgrades have completed successfully.

| | Status | Job description | Actual start date/time | End date/time | Company | Created by | Batch job ID | |
|---|---|---|---|---|---|---|---|---|
| | Error | Upgrade 1534 => 2000 | 25/07/2025 12:34:04 PM | 25/07/2025 12:34:22 PM | PUK | Admin | 68723895020 | |
| | Ended | Upgrade PESChanges - PUK - P... | 25/07/2025 12:35:10 PM | 25/07/2025 12:35:22 PM | PUK | Admin | 68723895021 | |
| | Ended | Upgrade PESChanges - PNC | 25/07/2025 12:35:53 PM | 25/07/2025 12:37:11 PM | PNC | Admin | 68723895023 | |
| | Ended | Upgrade PESChanges - PNT | 25/07/2025 12:35:32 PM | 25/07/2025 12:40:25 PM | PNT | Admin | 68723895022 | |
| ● | Ended | Upgrade 1534 => 2000 | 25/07/2025 1:01:56 PM | 25/07/2025 1:02:11 PM | PUK | Admin | 68723895020 | |

VersionUpdate 1535 VendBankAccounts PESChanges >  For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges

VersionUpdate 1535 VendBankAccounts PESChanges >  PESChanges upgrade already completed in All entities. Remaining entities to clear: None

VersionUpdate 1535 VendBankAccounts PESChanges > Reset changeset number >  Before: 1534

VersionUpdate 1535 VendBankAccounts PESChanges > Reset changeset number >  After: 1535

VersionUpdate 1535 VendBankAccounts PESChanges >  Duration 00:00:00.0

Upgrade > Delete Project definition groups >  0 definition group(s) deleted

Upgrade > Delete Project definition groups >  0 definition group(s) deleted

Upgrade > Cross company data sharing >  Recommending Table share Vendor Master Data for Vendor history - instead of None

Upgrade > Cross company data sharing >  Recommending Table share Vendor Master Data for Vendor history - instead of None

## For all enabled entities:

In this second example, we'll run all enabled legal entities at once, which will take longer if more than one entity is concerned.

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| | Status | Job description | | Actual start date/time | End date/time | Company | Created by | Batch job ID | ⋮ |
|---|---|---|---|---|---|---|---|---|---|
| ○ | | | 🔽 | | | | | | |
| ○ | Ended | Upgrade PESChanges - PNT | | 31/07/2025 10:25:29 PM | 31/07/2025 10:26:51 PM | PNT | Admin | 68723895770 | |

Upgrade PESChanges - PNT > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges     📄 Open

Upgrade PESChanges - PNT > Running for All enabled companies

Upgrade PESChanges - PNT > PDS > 746 vendor history record(s) created

Upgrade PESChanges - PNT > PDS > Cleared PESChanges from 96 record(s)

Upgrade PESChanges - PNT > PDS > Processed through 99 record(s)

Upgrade PESChanges - PNT > PDS > PESChanges upgrade already completed in PDS. Remaining entities to clear: PNC, PNT

Upgrade PESChanges - PNT > PNC > 16569 vendor history record(s) created

Upgrade PESChanges - PNT > PNC > Cleared PESChanges from 948 record(s)

Upgrade PESChanges - PNT > PNC > Processed through 948 record(s)

Upgrade PESChanges - PNT > PNC > PESChanges upgrade already completed in PNC. Remaining entities to clear: PNT

Upgrade PESChanges - PNT > PNT > 37469 vendor history record(s) created

Upgrade PESChanges - PNT > PNT > Cleared PESChanges from 296 record(s)

Upgrade PESChanges - PNT > PNT > Processed through 297 record(s)

Upgrade PESChanges - PNT > PNT > PESChanges upgrade already completed in PNT. Remaining entities to clear: None

This job will run all enabled legal entities and confirm completion.

Return to the failed upgrade batch, change status back to Waiting:



After completion, a second batch job history completes successfully and confirms all upgrades have completed successfully.

| | Status | Job description | Actual start date/time | End date/time | Company | Created by | Batch job ID | ⋮ |
|---|---|---|---|---|---|---|---|---|
| ○ | | | | | | | | |
| | Error | Upgrade 1535 => 2000 | 31/07/2025 10:22:57 PM | 31/07/2025 10:24:49 PM | PNT | Admin | 68723894270 | |
| | Ended | Upgrade PESChanges - PNT | 31/07/2025 10:25:29 PM | 31/07/2025 10:26:51 PM | PNT | Admin | 68723895770 | |
| ✓ | Ended | Upgrade 1535 => 2000 | 31/07/2025 10:56:41 PM | 31/07/2025 10:57:05 PM | PNT | Admin | 68723894270 | |

Upgrade > **Delete Project definition groups** > 0 definition group(s) deleted

Upgrade > **Delete Project definition groups** > 0 definition group(s) deleted

Upgrade > **CCDS RecreatePolicies** > **Cross company data sharing** > Checked 5 Entity(ies)

**1541 PESChanges** > Version 1541 (20/07/2025) - Deprecated PESChanges - Upgrade strategy for moving PESChanges into Vendor history log.

**1541 PESChanges** > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges     📄 Open

**1541 PESChanges** > PESChanges upgrade already completed in All entities. Remaining entities to clear: None

**1541 PESChanges** > Changeset number: 1535 -> 1541

**1546 RemoveIncorrectStatuses** > Version 1546 (26/07/2025) - Incorrect Parameters Statuses - Remove incorrect statuses from PESParameters fields. Some residual numbers remaining from previous versi

**1546 RemoveIncorrectStatuses** > Changeset number: 1541 -> 1546

**Final 2000** > Changeset number: 1546 -> 2000