

PeopleSoft 5.2 - Onboarding with AIP Console

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i Summary: this page explains how to onboard a new PeopleSoft application with **AIP Console** and work the process of analyzing the source code and generating a snapshot.

Note that AIP Console automates a large part of the configuration process for analyzing PeopleSoft technologies, as such, if you have previously been using the legacy CAST Management Studio to run your analyses, you will find that some of the steps required for CAST Management Studio are not mentioned in the instructions below. This is not an omission, it is simply because these steps are now automated and do not require manual intervention.

Prerequisites

AIP Core	8.3.39																																						
AIP Console	1.27.0-funcrel																																						
Extension	5.2.0 (this will be installed automatically by AIP Console). <div style="border: 1px solid #ccc; padding: 5px;"> <p>i Note however, that a batch file (PeopleSoft-Extract-CLI.bat) is required to perform the repository extraction (see below) and this file is provided itself. Therefore if you are onboarding a new application, the PeopleSoft extension will not yet be available on the AIP Node: if this is the case, you need to download the extension (https://extend.castsoftware.com/#/extension?id=com.castsoftware.peoplesoft&version=latest) and extract (using 7Zip or similar) to the AIP Node.</p> </div>																																						
Application creation	<p>Two applications should be created in AIP Console, for the Vanilla and Project repositories. See Add a new Application for more information about this. The applications should be named as follows:</p> <ul style="list-style-type: none"> • "PeopleSoft_Project" • "PeopleSoft Vanilla" <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <table border="1"> <thead> <tr> <th>Application (3) ↑</th> <th>Version</th> <th>App Domain</th> <th>Version Status</th> <th>Last Action Status</th> <th>Next Action</th> </tr> </thead> <tbody> <tr> <td>PeopleSoft_Project</td> <td></td> <td></td> <td></td> <td style="text-align: center;">●</td> <td style="text-align: center;">⊕ Add version</td> </tr> <tr> <td>PeopleSoft_Vanilla</td> <td></td> <td></td> <td></td> <td style="text-align: center;">●</td> <td style="text-align: center;">⊕ Add version</td> </tr> </tbody> </table> </div> <p>Here are some indicative schema sizes for a large PeopleSoft analysis (3.4 GB of source code):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Schema</th> <th>Data</th> <th>Index</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Management Schema</td> <td>163 MB</td> <td>-</td> <td>163 MB</td> </tr> <tr> <td>Dashboard Schema</td> <td>1.5 GB</td> <td>1.5 GB</td> <td>3 GB</td> </tr> <tr> <td>Project Analysis Database</td> <td>7 GB</td> <td>7 GB</td> <td>14 GB</td> </tr> <tr> <td>Vanilla Analysis Database</td> <td>5 GB</td> <td>6 GB</td> <td>11 GB</td> </tr> </tbody> </table>	Application (3) ↑	Version	App Domain	Version Status	Last Action Status	Next Action	PeopleSoft_Project				●	⊕ Add version	PeopleSoft_Vanilla				●	⊕ Add version	Schema	Data	Index	Total	Management Schema	163 MB	-	163 MB	Dashboard Schema	1.5 GB	1.5 GB	3 GB	Project Analysis Database	7 GB	7 GB	14 GB	Vanilla Analysis Database	5 GB	6 GB	11 GB
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Repository extraction	AIP Console only accepts .castextraction files generated by the CAST Database Extractor , in other words, the Vanilla and Project repository extraction outside of AIP Console (see below for more information). Note that for the Project repository extraction , this file must be named with the exact same project file , for example if you name the file PeopleSoftExtract_Project.castextraction , the .project file must be named PeopleSoftExtract_Project.pro																																						

.project file for Project repository

A **.project** text file must be configured and delivered with the **.castextraction** file for the Project repository. This file configures rule parameters and other more information). Note that this file must be named with the **exact same prefix** as used for the Project repository **.castextraction** file, for example if you name **ftExtract_Project.project**, the **.castextraction** file must be named **PeopleSoftExtract_Project.castextraction**.

Step 1 - Repository extraction

The Vanilla and Project repositories must be extracted to **.castextraction** files using the **CAST Database Extractor** (which can be downloaded from <https://extend.castsoftware.com/#/extension?id=com.castsoftware.aip.extractor.sqldatabase&version=latest>). A tailor made **batch file** provided in the PeopleSoft extension is available for running the offline extraction with the **CAST Database Extractor** - this should be used and can be found in the following location in the extension:

```
com.castsoftware.peoplesoft.<version>\TOOLS\OfflineExtraction\PeopleSoft-Extract-CLI.bat
```

This batch file will need modification BEFORE you run it - this is so that it can be tailored to the RDBMS on which your PeopleSoft repositories are hosted and which you want to extract - see the sections below.

Configure PeopleSoft-Extract-CLI.bat

Find the following sections in the batch file and modify them to match your environment:

RDBMS access parameters

Find the section **rem Database parameters = Access to the database hosting the PeopleSoft repository**:

<pre>rem for Oracle : oracle rem for DB2 : db2 SET DBTYPE=<PARAM></pre>	<p>You must set this option to match the target RDBMS. For example for Oracle Server:</p> <pre>SET DBTYPE=oracle</pre>
<pre>rem either a host or an IP SET SERVER_NAME=<PARAM> SET PORTNUMBER=<PARAM> SET DATABASE_NAME=<PARAM></pre>	<p>Enter the three fields, for example, for Oracle Server:</p> <pre>SET SERVER_NAME=MY_HOST SET PORTNUMBER=1521 SET DATABASE_NAME=MY_DB</pre> <p>Hints:</p> <ul style="list-style-type: none">• SET SERVER_NAME - enter an IP address or host name• SET PORTNUMBER:<ul style="list-style-type: none">• DB2 = 50000• Oracle = 1521 (as per the Tnsname.ora file)• Microsoft SQL Server = 1433• SET DATABASE_NAME:<ul style="list-style-type: none">• DB2 = The DB2 database name• Oracle = Either the Service name as per the Tnsname.ora file, or the SID (System ID) as per the Tnsname.ora file• Microsoft SQL Server = The instance name
<pre>rem <CHOOSE> %JDBC_URL_ORACLE_SID% or %JDBC_URL_ORACLE_SERVICE% SET JDBC_URL_ORACLE=% JDBC_URL_ORACLE_SID%</pre>	<p>When targeting an Oracle Server, you must choose one parameter or the other. E.g. if you define a Service name in SET DATABASE_NAME, you should change the line to:</p> <pre>SET JDBC_URL_ORACLE=%JDBC_URL_ORACLE_SERVICE%</pre>

PeopleSoft repository access parameters

Find the section **rem PeopleSoft parameters = Access to the PeopleSoft repository**:

<pre>rem user that contains the tables SET SCHEMA=<PARAM></pre>	<p>Schema/database in which the PeopleSoft tables are stored:</p> <ul style="list-style-type: none">• Oracle USER name• DB2 schema name <p>For example:</p> <pre>SET SCHEMA=MY_DB</pre>
<pre>rem Repository type = Vanilla or Project SET PROJECT_NAME=<PARAM></pre>	<p>Choose Vanilla or Project according to the repository you are extracting:</p> <pre>SET PROJECT_NAME=Project</pre>

SET LANGUAGE=FRA	This option sets the language used in the user interface. Default value = FR A (French). Refer to official documentation for available values: https://docs.oracle.com/cd/F44947_01/pt858pbr3/eng/pt/tapd/concept_LanguageSelections-c37ff5.html
rem Repository version. Either PeopleTools8.45, PeopleTools8.46, PeopleTools8.47, PeopleTools8.48, rem PeopleTools8.49, PeopleTools8.50, PeopleTools8.51, PeopleTools8.52, PeopleTools8.53. rem use PeopleTools8.53 for newer versions SET REPOSITORY_VERSION=<PARAM>	Choose the PeopleSoft version in your target repositories: SET REPOSITORY_VERSION=PeopleTools8.53

Run the batch file

When you run the batch file on each PeopleSoft repository, the resulting output should be **one .castextraction file** for each repository, for example:

- **PeopleSoftExtract_Vanilla.castextraction**
- **PeopleSoftExtract_Project.castextraction**

These files need to be delivered to AIP Console - see below.

Batch file logging

The batch file will generate logs inside the folder defined in the parameter "ROOT_FOLDER", as follows:

- a sub-folder "**01_Results**" that contains the extraction file (**PeopleSoftExtract_Project.castextraction** or **PeopleSoftExtract_Vanilla.castextraction**)
- a sub-folder "**log**" that contains the extraction log file (**ExtractorLog_Project.log** or **ExtractorLog_Vanilla.log**) and the execution file (**Project.log** or **Vanilla.log**)

The execution log file gives you the status of the execution:

Situation	Message	What should you do?
When the execution is successful.	Extraction was successful !	Nothing.
When an error is identified, the return code of the extraction is interpreted and a functional message ERROR_MESSAGE is displayed.	Error while extracting PeopleSoft Project : % ERROR_MESSAGE% <ul style="list-style-type: none"> • 1000: Missing configuration file % CONFIG_FILE%. • 1001: Check the log file % EXECUTION_LOG_FILE%. • 2000: Unable to establish a connection. Check the log file % EXECUTION_LOG_FILE%. • 2001: Error during the extraction. Check the log file % EXECUTION_LOG_FILE%. • Other: Java error. Contact CAST Support. 	<ul style="list-style-type: none"> • Please checks the logs, fix the configuration and retry the extraction. • If the issue is not a configuration issue, please contact the CAST Support.

Potential errors:

Validation error #-1: Schema EFORCE_G5R3R is not a PeopleSoft repository: table PSRECDEFN is missing	If errors similar to " Validation error #-1: Schema EFORCE_G5R3R is not a PeopleSoft repository: table PSRECDEFN is missing " are reported in extactor's log, it means either the schema has no PSRECDEFN table, or USER rights are insufficient (SELECT has not been granted on this table).
Resolution error type in / Invalid identification group value	The extraction log may contain the following messages: <ul style="list-style-type: none"> • Resolution error type in • Invalid identification group value <p>These messages have a limited impact if the ratio of "Number of information messages" / "Number of rows extracted" is kept low (i.e. less the 1 or 2%). Some Quality Rule violations may be missed if these messages appear, however, the overall impact is low.</p>

Step 2 - .project file configuration



Note that this file must be named with the **exact same prefix** as used for the Project repository .castextraction file, for example if you name the file **PeopleSoftExtract_Project.project**, the .castextraction file must be named **PeopleSoftExtract_Project.castextraction**.

The **Project repository** requires a **.project** configuration file that defines specific information required during the analysis:

- The name of the Vanilla application or Analysis schema
- Definition of PeopleSoft specific rule contextual parameters

Below is a template .project file - items in square brackets need to be manually defined:

```
<PeoplesoftProjectConfig vanillaApplication="[application_name_or_analysis_schema_name]">
  <PeopleSoftApplication name="[peoplesoft_app_name]" vanillaName="[app_name_in_vanilla]" />
  <QualityRule id="[rule_id]">
    <Parameter name="[parameter_name]" value="[parameter_value]" />
  </QualityRule>
  <QualityRuleGroup name="companyPrefix" active="[true_or_false]">
    <QualityRule id="[rule_id]" active="[true_or_false]">
      <Parameter name="[parameter_name]" value="[parameter_value]" />
    </QualityRule>
  </QualityRuleGroup>
</PeoplesoftProjectConfig>
```

<PeoplesoftProjectConfig>

This opening tag is required and defines the name of the Vanilla application defined in AIP Console. You can define either the **Application name**, or the corresponding **Analysis schema name**. Both are highlighted below and can be found in the AIP Console Admin Center (see [Administration Center - Applications - Application Details](#)):

The screenshot shows the AIP Console interface. At the top, the breadcrumb 'Applications / PeopleSoft_Project' is shown, with 'PeopleSoft_Project' highlighted in yellow and a red arrow pointing to it from a label 'Application name'. Below this, there is a section for 'Database Schemas' with a table listing different bases. The table has two columns: 'Type' and 'Name'. The rows are: 'Management Base' (Name: peoplesoft_project_mngt), 'Local Base' (Name: peoplesoft_project_local), and 'Central Base' (Name: peoplesoft_project_central). The 'Local Base' row is highlighted in yellow, and a red arrow points from a label 'Analysis schema name' to the 'peoplesoft_project_local' value.

In the above example, this would give the following when using the **Application Name**:

```
<PeoplesoftProjectConfig vanillaApplication="Peoplesoft_Project">
</PeoplesoftProjectConfig>
```

<QualityRule> and <Parameter>

This section allows you to define the **contextual parameters** for specific PeopleSoft rules that will be triggered during the analysis, specifically to adapt them to your own environment. Use the tables below to create the entries you need. Note that if you DO NOT define an entry for a rule in the .project file, then the rule WILL be triggered during the analysis, but will use the default parameter values provided in the Assessment Model.

Multiple values, char: as they are related to naming convention, they must be adapted to the project:

MetricID (external ID)	Rule name	Parameter name	Default value	Project value
1600380	PeopleSoft: Naming convention on Search Record	Suffix PeopleSoft Search	_SVW _SRCH	
1600384	PeopleSoft: Naming convention on Language Record Table	Suffix PeopleSoft Language Record Table	_LANG _LNG _LN	
1600386	PeopleSoft: Naming convention on Language Record View	Suffix PeopleSoft Language Record View	_LVW _LV	
1600396	PeopleSoft: Naming convention on AE State Record	Suffix PeopleSoft AE State Record	_AET	
1600398	PeopleSoft: Naming convention on AE Temporary Record	Suffix PeopleSoft AE Temp Record	_TAO _TMP	
1600400	PeopleSoft: Naming convention suffix on Record View	Suffix PeopleSoft Record View	_VW	
1600402	PeopleSoft: Naming convention suffix on Record Derived	Suffix PeopleSoft Record Derived	_WRK _WK	
1600484	PeopleSoft : Create all new Record Table in a specific tablespace	PeopleSoft: Tablespace for Record View	TAB_EFDATA_XL	
1600486	PeopleSoft: Create all new Record Temp in a specific tablespace	PeopleSoft: Tablespace for Record View	TAB_EFWORK_XL	
1601700 to 1601766	PeopleSoft: Naming convention on Record Table to PeopleSoft: Naming convention on URL	PeopleSoft: Prefix for XXX	EF_	

Multiple values, char: as they are related to naming convention, they must be adapted to the project

MetricID (external ID)	Rule name	Parameter name	Default value	Project value
1600380	PeopleSoft: Naming convention on Search Record	Suffix PeopleSoft Search	_SVW _SRCH	
1600384	PeopleSoft: Naming convention on Language Record Table	Suffix PeopleSoft Language Record Table	_LANG _LNG _LN	
1600386	PeopleSoft: Naming convention on Language Record View	Suffix PeopleSoft Language Record View	_LVW _LV	
1600396	PeopleSoft: Naming convention on AE State Record	Suffix PeopleSoft AE State Record	_AET	
1600398	PeopleSoft: Naming convention on AE Temporary Record	Suffix PeopleSoft AE Temp Record	_TAO _TMP	
1600400	PeopleSoft: Naming convention suffix on Record View	Suffix PeopleSoft Record View	_VW	
1600402	PeopleSoft: Naming convention suffix on Record Derived	Suffix PeopleSoft Record Derived	_WRK _WK	
1600484	PeopleSoft : Create all new Record Table in a specific tablespace	PeopleSoft: Tablespace for Record View	TAB_EFDATA_XL	
1600486	PeopleSoft: Create all new Record Temp in a specific tablespace	PeopleSoft: Tablespace for Record View	TAB_EFWORK_XL	
1601700 to 1601766	PeopleSoft: Naming convention on Record Table to PeopleSoft: Naming convention on URL	PeopleSoft: Prefix for XXX	EF_	

Single value, numerical: As a first approach, you can stick to the default values

MetricID (external ID)	Rule name	Parameter name	Default value	Project Value
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1600168	PeopleSoft: All new Translate value should be at dd/mm/yyyy	PeopleSoft: Effective date	01/01/1901	
1600184	PeopleSoft: Avoid PeopleCode Event with High Cyclomatic	PeopleSoft: Max CC in Event	10	
1600186	PeopleSoft: Avoid PeopleCode Functions with High Cyclomatic	PeopleSoft: Max CC in Function	10	
1600188	PeopleSoft: Avoid PeopleCode Methods with High Cyclomatic	PeopleSoft: Max CC in Method	10	
1600190	PeopleSoft: Avoid PeopleCode Classes with High Cyclomatic	PeopleSoft: Max CC in Class	100	
1600620	PeopleSoft: Avoid PeopleCode Events with a low comment/code ratio	PeopleSoft: Min % Comment in Event	10	
1600622	PeopleSoft: Avoid PeopleCode Functions with a low comment/code ratio	PeopleSoft: Min % Comment in Function	10	
1600624	PeopleSoft: Avoid PeopleCode Methods with a low comment/code ratio	PeopleSoft: Min % Comment in Method	10	
1600626	PeopleSoft: Avoid PeopleCode Classes with a low comment/code ratio	PeopleSoft: Min % Comment in Class	10	
1600480	PeopleSoft: Avoid too many Related displays	PeopleSoft: Max related display	5	
1600488	PeopleSoft: Avoid tables having indexes with a too large index definition	PeopleSoft: Max index size	3	
1600642	PeopleSoft: Pages should be designed assuming the user has an 800x600 monitor resolution	PeopleSoft: Page Width	800	
		PeopleSoft: Page Height	600	
1600644	PeopleSoft: Developers should avoid developing web pages that result in horizontal scrolling	PeopleSoft: Page Width Max	800	
1600646	PeopleSoft: Developers should not build long pages that are longer than 5 pages	PeopleSoft: Page Height Max	2500	
1600648	PeopleSoft: Avoid use a radio button or check box when the user has more than three choices	PeopleSoft: Prefix for Owner ID in Record View PeopleSoft: Max choices	3	
1601800	PeopleSoft: Record Table should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Table	EF	
1601802	PeopleSoft: Record View should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record View	EF	
1601804	PeopleSoft: Record Derived should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Derived	EF	
1601806	PeopleSoft: Record Sub should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Sub	EF	
1601808	PeopleSoft: Record Dynamic should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Dynamic	EF	
1601810	PeopleSoft: Record Query should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Query	EF	
1601812	PeopleSoft: Record Temp should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Temp	EF	
1601814	PeopleSoft: Field should have a OwnerID	PeopleSoft: Prefix for Owner ID in Record Temp	EF	
1601816	PeopleSoft: Page should have a OwnerID	PeopleSoft: Prefix for Owner ID in Page	EF	
1601818	PeopleSoft: Sub Page should have a OwnerID	PeopleSoft: Prefix for Owner ID in Sub Page	EF	
1601820	PeopleSoft: Secondary Page should have a OwnerID	PeopleSoft: Prefix for Owner ID in Secondary Page	EF	
1601822	PeopleSoft: SQL should have a OwnerID	PeopleSoft: Prefix for Owner ID in SQL	EF	
1601824	PeopleSoft: Component Interface should have a OwnerID	PeopleSoft: Prefix for Owner ID in Component Interface	EF	
1601826	PeopleSoft: Application Engine should have a OwnerID	PeopleSoft: Prefix for Owner ID in Application Engine	EF	
1601828	PeopleSoft: Package should have a OwnerID	PeopleSoft: Prefix for Owner ID in Package	EF	
1601830	PeopleSoft: Mobile Page should have a OwnerID	PeopleSoft: Prefix for Owner ID in Mobile Page	EF	
1601832	PeopleSoft: Component should have a OwnerID	PeopleSoft: Prefix for Owner ID in Component	EF	
1601834	PeopleSoft: Menu should have a OwnerID	PeopleSoft: Prefix for Owner ID in Menu	EF	
1601836	PeopleSoft: Popup Menu should have a OwnerID	PeopleSoft: Prefix for Owner ID in Popup Menu	EF	
1600760	PeopleSoft: Avoid Classes with more than X Methods	PeopleSoft: Max Number Method in Class	30	
1600762	PeopleSoft: Avoid Records Tables with more than X Fields	PeopleSoft: Max Number Field in Record Table	80	
1600764	PeopleSoft: Avoid Records Views with more than X Fields	PeopleSoft: Max Number Field in Record View	80	
1600766	PeopleSoft: PeopleSoft: Avoid Records Derived with more than X Fields	PeopleSoft: Max Number Field in Record Derived	60	
1600768	PeopleSoft: PeopleSoft: Avoid Sub-records with more than X Fields	PeopleSoft: Max Number Field in Record Sub	20	
1600770	PeopleSoft: Avoid Pages with more than X linked Records Max	PeopleSoft: Max Number Linked Record in Page	4	
1600772	PeopleSoft: Avoid Pages with more than X linked Pages	PeopleSoft: Max Number Linked Page in Page	2	

1600774	PeopleSoft: Avoid Methods with too many parameters	PeopleSoft: Max Number Parameter in Method	5	
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In the following example, we have changed two contextual parameters for the rule **1600184** (PeopleSoft: Avoid PeopleCode Event with High Cyclomatic), and one parameter value for the rule **1600384** (PeopleSoft: Naming convention on Language Record Table):

```
<QualityRule id="1600184">
  <Parameter name="PeopleSoft: Max CC in Event" values=" -999"/>
</QualityRule>
<QualityRule id="1600384">
  <Parameter name="Suffix PeopleSoft Language Record Table " value="Joe, William, Jack, Averell"/>
</QualityRule>
```

Step 3 - configure source code

You now need to configure the source code to deliver in AIP Console. There are two ways to deliver the source code, either in a **ZIP file**, or via a [Source Folder Location](#):

Vanilla repository	<p>Place the PeopleSoftExtract_Vanilla.castextraction file (resulting from the extraction process in Step 1) in a folder called Vanilla. If you want to:</p> <ul style="list-style-type: none"> • deliver via ZIP file, zip the folder called Vanilla to create a zip file called Vanilla.zip. • deliver via a Source Folder Location, copy the Vanilla folder to your defined Source Folder Location
Project repository	<p>Place the following files in a folder called Project - note that the prefix of each file must be identical the other:</p> <ul style="list-style-type: none"> • PeopleSoftExtract_Project.castextraction file (resulting from the extraction process in Step 1) • PeopleSoftExtract_Project.project file (resulting from the configuration process in Step 2) <p>If you want to:</p> <ul style="list-style-type: none"> • deliver via ZIP file, zip the folder called Project to create a zip file called Project.zip. • deliver via a Source Folder Location, copy the Project folder to your defined Source Folder Location

Step 4 - create Version, deliver source code and run analysis/snapshot

For each Application (Vanilla and Project) that you have created in AIP Console, you need to now deliver the source code configured in Step 3 and run the analysis/snapshot. In AIP Console, the process can be done in small steps, or in one go, and each is explained in more detail in:

- [Standard onboarding - add a new Version - deliver code - generate snapshot](#)
- [Advanced onboarding](#)

It is very important that you run the analysis and snapshot for the **Vanilla application BEFORE** you run the analysis and snapshot for the **Project application**.

Step 5 - check results

When the snapshot has been completed for both repositories, CAST highly recommends that you check the results. This process is explained in more detail in [Standard onboarding - check results](#).

For the analysis step, the following is an example of the messages that you could expect (errors are shown in red):

- PSOFT-000 Start
- PSOFT-001 Update metrics
 - **PSOFT-101 Error executing xxx**
- PSOFT-002 Additional links
 - **PSOFT-102 Error executing xxx**
- PSOFT-003 Discrimination data
 - **PSOFT-103 Error executing xxx**
 - **PSOFT-100 Variable PSOFT_VANILLA_SCHEMA is not defined**
- PSOFT-004 Import data from Vanilla schema: xxx
 - **PSOFT-104 Error while importing data from the Vanilla schema**
- PSOFT-005 Discrimination computation
 - **PSOFT-105 Error executing xxx**

- PSOFT-006 End