



PeopleSoft® Enterprise® Portal Solutions® 8.9 Installation

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PeopleSoft Enterprise Portal Solutions 8.9

Installation

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About This PeopleBook

This preface discusses:

- Audience
- Related Publications
- We Welcome Your Comments

Note. This book is designed to direct you through a basic PeopleSoft installation. It is not a substitute for the database administration manuals provided by your RDBMS vendor, the network administration manuals provided by your network vendor, or the installation and configuration manuals for third-party products used with PeopleSoft.

Note. Required updates to this installation documentation are provided in the form of "Required at Install" incidents, available on PeopleSoft Customer Connection. In addition, *PeopleTools and other application-specific installation steps are provided in separate documents.* For instance, if you are performing a PeopleSoft CRM installation, you need both this PeopleSoft Enterprise Portal installation documentation, as well as the PeopleTools installation documentation and any additional instructions provided by CRM. To find the installation documentation specific to your applications, go to PeopleSoft Customer Connection, choose *Site Index*, *Installation Guides and Notes*, and then look under the subcategory for your applications.

Note. Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of this installation guide for the correct version of PeopleTools.

Audience

This book is written for the individuals responsible for installing and administering the PeopleSoft environment. We assume that you are familiar with your operating environment and RDBMS and that you have the necessary skills to support that environment. You should also have a working knowledge of SQL. We recommend that you have completed at least one PeopleSoft introductory training course (particularly the Server Administration course) and have a basic understanding of the PeopleSoft system. Probably the most important component in the installation and maintenance of your PeopleSoft system is your onsite expertise. Only qualified and experienced individuals should attempt to install PeopleSoft. If you have any doubts as to whether your onsite staff is capable of successfully completing an installation, contact your PeopleSoft representative.

Related Publications

To install third-party products for use with PeopleSoft, including those products that are packaged with your PeopleSoft shipment, you should refer to the documentation provided with those products, as well as this documentation.

For reference information on PeopleTools, you may wish to consult the following books:

- *Enterprise PeopleTools 8.46 PeopleBook: System and Server Administration.* Information on configuring the PeopleSoft application server and supported web servers, data integrity tools, database level auditing, and PeopleTools utilities. Information on PeopleSoft administrative utilities, such as Configuration Manager and so on.
- *Enterprise PeopleTools 8.46 PeopleBook: Data Management.* Information on PeopleSoft data management utilities, such as Data Mover and Data Archive Manager.
- *Enterprise PeopleTools 8.46 PeopleBook: Security Administration.* Information on setting up and modifying user access to your PeopleSoft applications.
- *Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Language Reference.* Reference information on the PeopleCode language, such as built-in functions, classes, meta-SQL, system variables, and so on.
- *Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Developer's Guide.* General information about the PeopleCode editor, the Component Processor, the data buffers, and how to use specific functions and classes.
- *Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Designer.* Information about the main tool for developing PeopleTools applications.
- *Enterprise PeopleTools 8.46 PeopleBook: Global Technology.* Information on the role of PeopleTools in the globalization of PeopleSoft applications.
- *Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Engine.* Information on the PeopleSoft proprietary batch programming tool.
- For information on PeopleSoft's reporting and analysis tools, see the PeopleBooks on Crystal Reports for PeopleSoft, PS/nVision, PeopleSoft Query, PeopleSoft Tree Manager, PeopleSoft Process Scheduler, and PeopleSoft Cube Manager.

For reference information on your particular application, refer to the documentation for your application.

We Welcome Your Comments

Your comments are very important to us. We encourage you to tell us what you like or would like changed about our application books, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Enterprise Portal Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588-8618

Or email comments to the authors of the PeopleSoft documentation at:

doc@peoplesoft.com

While we can't guarantee to answer every email message, you can be sure we'll pay careful attention to your comments and suggestions; we're always looking for ways to improve our product communications for you.

CHAPTER 1

Understanding Portal Products

This chapter discusses:

- Understanding the PeopleSoft Enterprise Portal Host Database Versus Content Provider Databases
- Understanding Portal Solutions Versus Portal Products
- Understanding Portal Products

Note. Before beginning the installation of any Portal Solution, be sure to check the PeopleSoft Customer Connection website for any updates and fixes that are required for installation.

Understanding the PeopleSoft Enterprise Portal Host Database Versus Content Provider Databases

The database that hosts your PeopleSoft Enterprise Portal is referred to as the *Portal Host* database. The Enterprise Portal (PA) database is the only supported Portal Host database. PeopleSoft application databases that contain the transaction content are referred to as *Content Provider* databases.

Understanding Portal Solutions Versus Portal Products

PeopleSoft *Portal Solutions* consist of the Enterprise Portal, Internal Controls Enforcer, and Investor Portal. The Enterprise Portal (PA) database can contain one or multiple PeopleSoft portals. For example, if you are using the Employee portal and the Supplier portal, you can install both of these portals in a single Enterprise Portal (PA) database.

PeopleSoft *Portal Products* are the Enterprise Portal, Supplier Portal, Employee Portal, and so forth, as well as the various Portal Packs. The Enterprise Portal consists of portal features, pagelets, and applications that extend the PeopleTools portal technology. The Enterprise Portal product is supported only in the Enterprise Portal (PA) database. A Portal Pack consists of database-specific pagelets.

Understanding Portal Products

Available portal products, their associated application databases, and applicable portal definitions are listed below. The PARTNER portal definition is available in PeopleTools 8.45 or higher.

Portal Product	PeopleSoft Application Database	EMPLOYEE	CUSTOMER	SUPPLIER	PARTNER
Enterprise Portal	Enterprise Portal	X	X	X	X
CRM Portal Pack	Customer Relationship Management	X	X		X
EPM Portal Pack	Enterprise Performance Management	X			
ESA Portal Pack	Financials Supply Chain Management (8.8 or higher)	X			
Financials Portal Pack	Financials Supply Chain Management	X	X		
Supply Chain Portal Pack	Financials Supply Chain Management	X	X	X	
HRMS Portal Pack	Human Resource Management Systems	X			
Investor Portal Pack	Enterprise Performance Management	X	X		
Internal Controls Enforcer	Enterprise Performance Management	X			

CHAPTER 2

Installing the PeopleSoft Enterprise Portal

This chapter discusses:

- Understanding PeopleSoft Enterprise Portal Installation
- Internet Connectivity Prerequisites
- Installation Prerequisites
- Checking Your License Code
- Installing the PeopleTools Product
- Installing PeopleBooks
- Installing the PeopleSoft Enterprise Portal 8.9 CD
- Installing the Multi-Language PeopleSoft Enterprise Portal 8.9 CD
- Installing the Enterprise Portal Database
- Setting Up Your Enterprise Portal Database Application Server
- Setting Up Your Enterprise Portal Process Scheduler
- Setting Up Your Enterprise Portal Database Web Server
- Testing Sign-On
- Setting the Default Portal Registry Definition
- Extending the Web Server Directory Path and Copying Demo Folders and Files to the Web Server
- Setting FTP URLs for Menu Items and Tasks
- Setting the FTP URL for Content Management Images
- Configuring Resource Finder
- Updating Enterprise Portal Options
- Removing Demo Portal Registry Data
- Cleaning Homepage Tab Definitions

Note. The database that hosts your PeopleSoft Enterprise Portal product, also known as the Portal Host database, must be an *Enterprise Portal (PA)* database.

Understanding PeopleSoft Enterprise Portal Installation

This section discusses:

- Understanding Portal Registry Definitions
- Understanding Multilingual Portal Installation

Understanding Portal Registry Definitions

PeopleSoft application releases on PeopleTools 8.4x are delivered with several portal registry definitions. PeopleSoft Enterprise Portal 8.9 supports the active use of multiple portal registries in a single Enterprise Portal (PA) database. The default portal registry is used when signing on to the database from the browser.

Understanding Multilingual Portal Installation

Multilingual files are delivered on a separate CD from the core application. It is very important that you install the multilingual files that correspond to the same release as the core application.

Internet Connectivity Prerequisites

As one of their primary functions, portals collect content from a variety of sources. Because most of the application processing takes place on the application server, it is important that this machine have connectivity established to a variety of systems.

If the following connectivity points are not established before the Enterprise Portal installation, it may lengthen the time needed to complete a task or keep certain portal features from working as designed. Before starting an Enterprise Portal installation, be sure to verify the following items.

PeopleSoft Enterprise Portal delivers a great deal of functionality related to internet-based content such as news feeds, stock quotes, and weather. This functionality relies upon issuing Hypertext Transfer Protocol (HTTP) requests by way of a Business Interlink on the application server. The following provides some scenarios in which you can test HTTP requests and responses from your application server.

From a browser on the application server, access an internet website such as <http://www.peoplesoft.com/>. This should successfully display the corresponding web page.

If a browser is not available on your application server (such as on some UNIX machines), you may try an alternative test by using TELNET to establish a connection to an external system. This should be done for both HTTP (Port 80, for example) and Secure Socket Layer (SSL) (Port 443, for example). For example, you can use: TELNET www.peoplesoft.com:80. Review your web configuration for the ports specified for HTTP and SSL.

Note. This is not as reliable a test, because it does not actually test an HTTP request and response.

If internet connectivity from the application server is not successful using one of the tests above, then the following functions will not work:

- Application Engine programs that load data from the internet, such as the Schedule External News Feed process (EO_PE_EXNEWS) and City List Administration process (EO_PE_CIT_AE) used for the Weather Magnet pagelet.
- Pagelets that directly access a uniform Resource Locator (URL), such as the Weather Magnet pagelet, will not display. Search boxes, such as the dictionary pagelets, will not display results.

Installation Prerequisites

The following requirements must be met prior to installing PeopleSoft Enterprise Portal.

- Install an appropriate version of PeopleTools.

The PeopleSoft Enterprise Portal (PA) database requires the installation of PeopleTools 8.46 plus Product Patch 8.46 (or higher patch/version of PeopleTools 8.4x).

- Have appropriate resources available for your PeopleSoft Enterprise Portal demonstration (demo) database.

The following table lists the approximate PeopleSoft Enterprise Portal demo database size for each platform:

Platform	Approximate Database Size
DB2/UNIX - ANSI	3.7 GB
DB2/UNIX - Unicode	5.6 GB
DB2/zOS Non-Unicode	2.3 GB
DB2/zOS Unicode	3.7 GB
Microsoft SQL Server Non-Unicode	1.0 GB
Microsoft SQL Server- Unicode	2.0 GB
Oracle - ANSI/Unicode	4.0 GB

- Create views for DB2 UNIX/NT Unicode.

For DB2 UNIX/NT Unicode, if the EOCM_GENTBLC_VW view fails to create, you must create a temporary system tablespace with a page size of 8 kilobytes before recreating it.

Task 2-1: Checking Your License Code

The products unlocked by a license code vary depending on the database with which the license code was delivered. When installing the Enterprise Portal (PA) database, you must use a license code that contains only PeopleSoft Enterprise Portal products. If you do not have a license code that contains the correct PeopleSoft products, contact the PeopleSoft Global Support Center to request a new license code.

Task 2-2: Installing the PeopleTools Product

This chapter does not provide information about installing the PeopleTools product. See *PeopleTools 8.4x Installation Guide*, "Using the PeopleSoft Installer."

Warning! Due to differing license codes, the installed PeopleTools product used by an Enterprise Portal (PA) database and the installed PeopleTools product used by any additional PeopleSoft application databases cannot be the same. You must have a separate PS_HOME directory for your Enterprise Portal (PA) database.

Task 2-3: Installing PeopleBooks

PeopleBooks are delivered with PeopleTools and every PeopleSoft application. The PeopleSoft Enterprise Portal has PeopleBooks written specifically about its features and functions.

Note. This chapter does not provide information regarding installation of PeopleBooks. See *PeopleTools 8.4x Installation Guide*, "Installing PeopleBooks."

Task 2-4: Installing the PeopleSoft Enterprise Portal 8.9 CD

The PeopleSoft Enterprise Portal 8.9 CD will load various files to your PS_HOME directory.

To install the PeopleSoft Enterprise Portal 8.9 CD:

1. Insert the PeopleSoft Enterprise Portal 8.9 CD into the CD-ROM drive.
2. Run the setup application from the root directory of the CD (setup.exe).
3. Read the PeopleSoft Installer Welcome screen. Click Next.
4. Read the license agreement. If you accept the license agreement terms, select the *I accept the terms of the license agreement* option. Click Next.
5. Enter the PeopleSoft license code. Click Next.
6. Select the database platform you want to use. Click Next.
7. Select the database type: *Non-Unicode Database* or *Unicode Database*. Click Next.
8. Select the types of servers you want to install. Click Next.
9. Select the directory to which you want to install the PeopleSoft Enterprise Portal 8.9. Click Browse to specify the server install directory name. Click Next.

Note. The database server directory must be the <PS_HOME> directory of the installed PeopleTools product for the Enterprise Portal (PA) database.

10. Select the PeopleSoft Enterprise Portal features you want to install. Click Next.
11. A confirmation screen displays the installation options you have selected. Click Next to begin the installation. A progress bar displays to indicate the progress of the installation.
12. When the installation is complete, click Finish to exit the PeopleSoft Installer program.

Task 2-5: Installing the Multi-Language PeopleSoft Enterprise Portal 8.9 CD

To install the Multi-Language PeopleSoft Enterprise Portal 8.9 CD:

Note. Perform this task only if are installing a multilingual Enterprise Portal (PA) database.

1. Insert the multi-language PeopleSoft Enterprise Portal 8.9 CD into the CD-ROM drive.

2. Run the Setup application from the root directory of the CD (setup.exe).
3. Read the PeopleSoft Installer Welcome screen. Click Next.
4. Read the license agreement. If you accept the license agreement terms, select the *I accept the terms of the license agreement* option. Click Next.
5. Enter the PeopleSoft license code. Click Next.
6. Select the database type: *Non-Unicode Database* or *Unicode Database*. Click Next.
7. Select the types of servers you want to install. Click Next.
8. Select the directory to which you want to install the PeopleSoft Enterprise Portal 8.9. Click Browse to specify the server install directory name. Click Next.

Note. This should be the same directory in which you installed the English CD files.

9. Select the PeopleSoft Enterprise Portal <language> features you want to install, where <language> matches the language(s) you are installing. Click Next.
10. A confirmation screen displays the installation options you have selected. Click Next to begin the installation. A progress bar displays to indicate the progress of the installation.
11. When the installation is complete, click Finish to exit the PeopleSoft Installer program.

Task 2-6: Installing the Enterprise Portal Database

You will need to create the system and demo Enterprise Portal (PA) databases you want to install.

Note. This chapter does not provide detailed information regarding the installation of PeopleSoft application databases. See *PeopleTools 8.4x Installation Guide*, "Creating a Database."

Task 2-7: Setting Up Your Enterprise Portal Database Application Server

You use the PeopleTools psadmin utility to configure the application server.

To configure your Enterprise Portal database application server:

Note. This chapter does not provide detailed information regarding the installation and configuration of application servers. See *PeopleTools 8.4x Installation Guide*, "Configuring the Application Server on Windows NT/2000" or *PeopleTools 8.4x Installation Guide*, "Configuring the Application Server on UNIX."

1. Run the psadmin utility from your <PS_HOME>/appserv directory.
2. Enter the user ID and user password values that have security to start the application server. The Enterprise Portal (PA) database is delivered with application server security granted to the user ID/user password values *VPI/VPI*.

Application server security is granted on the permission list by selecting the *Can start application server* option. The permission list is then attached to a role, and the role is then attached to the user ID.

3. When configuring the application server, the WSL, JSL, and JRAD port numbers are populated by default. These values must be unique for the Enterprise Portal (PA) database's application server. You may alter the port values, if needed.
4. To access the Enterprise Portal (PA) database application server from the Enterprise Portal (PA) database web server, you will need to know some of the values that were used to set up the application server. For your reference, complete the table below:

Necessary Information	PA Demo Database	PA System Database
Database Name	PA880DMO, for example.	PA880SYS, for example.
Application Server Name	appservermachine1, for example.	appservermachine1, for example.
JSL Port	9000, for example	9010, for example.

Note. The application server configuration file contains parameters for SMTP mail settings. The mail server is needed for workflow email notification in the portal applications. This chapter does not provide information regarding the installation and configuration of mail servers for use by the application server. For more information, see *PeopleTools PeopleBook: Server Tools Administration*.

Task 2-8: Setting Up Your Enterprise Portal Process Scheduler

You use the PeopleTools psadmin utility to configure the Process Scheduler.

This chapter does not provide information regarding the configuration of Process Schedulers. See *PeopleTools 8.4x Installation Guide*, "Setting Up Process Scheduler on Windows," *PeopleTools 8.4x Installation Guide*, "Setting Up Process Scheduler on UNIX," or *PeopleTools 8.4x Installation Guide*, "Setting Up Process Scheduler on z/OS."

Task 2-9: Setting Up Your Enterprise Portal Database Web Server

Setting up the web server for the Enterprise Portal database involves installing your web server and installing the PeopleSoft Pure Internet Architecture. In essence, you are installing a website for your Enterprise Portal database. The localhost name of the web server machine and the database's site name uniquely determine this website's URL.

Localhost: The web server machine name where the PeopleSoft Pure Internet Architecture for the Enterprise Portal database is installed.

Site Name: The web server directory folder where the files for the Enterprise Portal database is installed. The default value is *ps*.

To install the web server:

Note. This chapter does not provide detailed information about the installation and configuration of the PeopleSoft Pure Internet Architecture web server files. See *PeopleTools 8.4x Installation Guide*, "Setting Up the PeopleSoft Internet Architecture on Windows NT/2000" or *PeopleTools 8.4x Installation Guide*, "Setting Up the PeopleSoft Internet Architecture on UNIX."

To install the PeopleSoft Pure Internet Architecture for the Enterprise Portal database:

1. Run the PeopleSoft Pure Internet Architecture setup (setup.exe) for the Enterprise Portal database from your <PS_HOME>/setup/mpinternet/ directory.
2. Use of an Authentication Token domain will affect the localhost value.

Note. If you will be implementing single sign-on, you must enter an Authentication Token Domain value. Enter your domain name, such as peoplesoft.com.

3. Use the values you entered in the table in the "Setting Up Your Enterprise Portal Database Application Server" task in this chapter to complete the following steps.
 - a. Enter the Enterprise Portal database application server machine name for the AppServer Name.
 - b. Enter the Enterprise Portal database application server JOLT port number for the JSL Port. The default value is 9000.

4. The initial PeopleSoft Pure Internet Architecture setup defaults to the site name *ps*. In subsequent PeopleSoft Pure Internet Architecture setups, change the default site name *ps* to a unique value.

This is the web server directory folder where the files for the Enterprise Portal database are installed. We recommend using the database name. This is handy for easy identification and ensures that the database web server files are installed in a unique website.

5. Accessing the Enterprise Portal database from your browser depends upon the values used when setting up the Enterprise Portal database web server. For your reference, complete the table below:

Necessary Information	PA Demo Database	PA System Database
Database Name	PA880DMO, for example.	PA880SYS, for example.
Site Name	pa880dmo, for example.	pa880sys, for example.
Localhost	Myserver, for example.	myserver.mydomain.com:8080, for example.

Task 2-10: Testing Sign-On

At this point, you must confirm that the configurations of your Enterprise Portal database application server and web server are correct. You confirm this by signing on to the Enterprise Portal database from the browser.

To sign on to the Enterprise Portal database from the browser:

1. From your browser, sign on to the Enterprise Portal database. The URL uses the format `http://localhost/pshome/signon.html`.

Replace *localhost* with the hostname of the web server machine where the Enterprise Portal database web server files are installed.

Replace *pshome* with the site name of the Enterprise Portal database web server files. This should be the name of your Enterprise Portal database, or the defaulted value *ps*.

Note. If the web server for the Enterprise Portal (PA) database is using an Authentication Token Domain, then the localhost value must include the network domain name in the URL. If the web server for the Enterprise Portal (PA) database is using an HTTP port other than the default port of 80, then the localhost value must contain the port number in the URL. For example, if the URL address was `http://myserver/pshome/signon.html`, then use the URL address `http://myserver.mydomain.com/pshome/signon.html`. If the URL address was `http://myserver:8080/pshome/signon.html`, then use the URL address `http://myserver.mydomain.com:8080/pshome/signon.html`.

2. Enter the user ID/user password combination as *VP1/VP1*.
3. The portal homepage with the Enterprise Menu pagelet should appear to verify that your sign on was successful. At least three homepage tabs will be available for the VP1 user: My Page, Guest Page, and Administration Page.

Task 2-11: Setting the Default Portal Registry Definition

The default portal determines which portal registry is defaulted when signing on to the Enterprise Portal database from the browser.

Note. The Enterprise Portal (PA) database can contain only a single default portal. The Enterprise Portal database is delivered with the default portal of *EMPLOYEE*.

To set the default portal name:

1. From your browser, sign on to the Enterprise Portal database.
2. In the browser address bar, change the URL to access other registries by replacing the default portal registry name and node name (*/EMPLOYEE/EMPL/*, */CUSTOMER/CUST/*, */SUPPLIER/SUPP/*, or */PARTNER/PART/*) with */PS_SITETEMPLATE/ENTP/*. The PARTNER portal registry is available in PeopleTools 8.45 or higher. Press ENTER to activate the adjusted address.
3. Navigate to PeopleTools, Portal, Portal Definitions.
4. A list of available portal names is displayed. Select the portal you want to be the default portal. Choose from *CUSTOMER*, *EMPLOYEE*, *SUPPLIER*, and *PARTNER*. The PARTNER portal registry is available in PeopleTools 8.45 or higher.

Note. For more information about default portal registries, see the "Understanding Portal Products" chapter in this installation guide.

5. Click Save.
6. Close the browser.

7. Stop the Enterprise Portal (PA) database application server.
8. Stop the Enterprise Portal (PA) database web server.
9. Start the Enterprise Portal (PA) database web server.
10. Start the Enterprise Portal (PA) database application server.

Task 2-12: Extending the Web Server Directory Path and Copying Demo Folders and Files to the Web Server

This section discusses:

- Extending the Web Folder Directory
- Copying Demo Folders and Files to the Web Server

The PeopleSoft Pure Internet Architecture install allows you to create multiple websites under the same domain. PeopleSoft Enterprise Portal requires, in addition to your custom named websites, that you have a website named *ps* to have a common location to store files for multiple sites.

PeopleSoft Enterprise Portal features utilize the web server directory of the peoplesoft domain. The site name *ps* must be extended to include the folder *portal_pa*. You then copy your demo folders and files to the newly extended *portal_pa* web server directory folder.

Task 2-12-1: Extending the Web Folder Directory

To extend the web folder directory:

1. Extend the web server directory for the peoplesoft domain to include the *portal_pa* folder for the *ps* website in the appropriate PeopleTools installed directory:

WebLogic: <PS_HOME>\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images\

WebSphere: <PS_HOME>\webserver\<WS-NodeName>\<PIA-Name>.ear\PORTAL\ps\images\

2. Resulting directory paths are:

WebLogic: <PS_HOME>\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images*portal_pa*\

WebSphere: <PS_HOME>\webserver\<WS-NodeName>\<PIA-Name>.ear\PORTAL\ps\images*portal_pa*\

PeopleSoft Enterprise Portal features utilize the web server directory of the peoplesoft domain. This directory must be extended and the demo folders and files need to be copied to the web server directory of the peoplesoft domain.

Task 2-12-2: Copying Demo Folders and Files to the Web Server

To copy demo folders and files to the web server:

Note. Perform this task only for your Enterprise Portal (PA) *demo* database.

1. Copy the contents of the *portal_pa* directory from <PS_HOME>\ps\images\portal_pa\ into the appropriate web server machine directory:

WebLogic: <PS_HOME>\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images\portal_pa\

WebSphere: <PS_HOME>\websrv\<WS-NodeName>\<PIA-Name>.ear\PORTAL\ps\images\portal_pa\

2. The resulting directory paths are:

WebLogic: <PS_HOME>\websrv\peoplesoft\applications\peoplesoft\PORTAL\ps\images
 \portal_pa\<website folder + image files + other files>

WebSphere: <PS_HOME>\websrv\<WS-NodeName>\<PIA-Name>.ear\PORTAL\ps\images
 \portal_pa\<website folder + image files + other files>

Task 2-13: Setting FTP URLs for Menu Items and Tasks

This section discusses:

- Setting Up the Menu Items and Integrated Task List FTP Service
- Updating the Menu Item FTP URL Definition
- Updating the Tasks FTP URL Definition

Note. This chapter does not provide detailed information regarding the installation and configuration of FTP servers or any concerns for firewalls. For more information, refer to your PeopleTools PeopleBooks on internet architecture and the Report Repository.

Task 2-13-1: Setting Up the Menu Items and Integrated Task List FTP Service

The PeopleSoft Enterprise Portal Menu Items and Integrated Task List features utilize the ability to attach and view files by way of an FTP service. However, the files can be stored on any FTP file server or in a database table.

To setup the Menu Items and Integrated Task List FTP service:

1. Establish additional FTP services on an FTP file server.
2. You can create multiple FTP IDs on the same server. These different IDs can then point to different directories on the same server machine as needed by the various FTP URLs.

Task 2-13-2: Updating the Menu Item FTP URL Definition

To update the Menu Item FTP URL definition:

Note. This task is needed only if you wish to store the file attachments for the submitted menu items on an FTP server instead of within the database.

1. Signon to PeopleSoft Enterprise Portal from the browser.
2. Navigate to PeopleTools, Utilities, Administration, URLs.
3. Enter the URL ID *MENU_ITEMS*. Click Search.
4. Change the URL to your defined FTP server URL, using the format *ftp://FTPuser:FTPpassword@FTPservername/FTPfolder*.

Task 2-13-3: Updating the Tasks FTP URL Definition

To update the Tasks FTP URL definition:

Note. This task is needed only if you wish to store the file attachments for the Tasks pagelet on an FTP server instead of within the database.

1. Signon to PeopleSoft Enterprise Portal from the browser.
2. Navigate to *PeopleTools, Utilities, Administration, URLs*.
3. Enter the URL ID *TASKS*. Click Search.
4. Change the URL to your defined FTP server, using the format *ftp://FTPuser:FTPpassword@FTPservername/FTPfolder*.

Task 2-14: Setting the FTP URL for Content Management Images

This section discusses:

- Understanding Content Management Image FTP URL Setup
- Updating the CMDOCFS URL Identifier
- Extending the Web Server Directory
- Establishing FTP Service for Content Management Image Attachments
- Updating the EPPCM_IMAGE URL Identifier Definition

Task 2-14-1: Understanding Content Management Image FTP URL Setup

PeopleSoft Enterprise Portal can upload, access, and render image files by way of an FTP service. To render image files as actual images, the FTP service must exist in a web server directory in the PeopleSoft domain. To accomplish this, you must complete the following tasks:

- Extend the web server directory to include the folder path *ps/images/portal_pa/*.
- Create an FTP service on the web server machine with an absolute path to the web server directory's extended folder path.
- Set the FTP path in the EPPCM_IMAGE URL identifier definition to point to the created FTP service.
- Update the Image Attachment URL Path field on the Portal Solutions Installation Options page to contain the web server's relative or absolute URL of the extended path that will contain the image files from the FTP server.

Note. The web server directory extension and the FTP service should only be installed on a single web server used by the Enterprise Portal database. For clustered web servers, all image attachments will be rendered and stored on a selected single web server.

Task 2-14-2: Updating the CMDOCFS URL Identifier

The Content Management files can be stored in either the database or on an FTP server. There are two different URLs delivered. One is delivered for database storage (CMDOCDB) and the other is delivered for FTP storage (CMDOCFS). The CMDOCFS URL needs to be defined correctly to point to the FTP server.

Note. This Content Management FTP URL is in addition to the Image Attachment FTP URL. This FTP server does not need to be on the web server machine.

1. Signon to the PeopleSoft Enterprise Portal from the browser.
2. Navigate to PeopleTools, Utilities, Administration, URLs.
3. Enter the URL ID *CMDOCFS*. Click Search.
4. Change the URL to your defined FTP server URL, using the format *ftp://FTPuser:FTPpassword@FTPservername/FTPfolder*.

Task 2-14-3: Extending the Web Server Directory

To extend the web server directory to include the */ps/images/portal_pa/* folder path :

1. Extend the web server directory for the PeopleSoft domain to include the *\ps\images\portal_pa* folder in the PeopleTools installation directory:
 WebLogic: *<PS_HOME>\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images*
 WebSphere: *<PS_HOME>\webserver\<WS-NodeName>\<PIA-Name>.ear\PORTAL\ps\images*
2. This resulting directory path is:
 WebLogic: *<PS_HOME>\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images\portal_pa*
 WebSphere: *<PS_HOME>\webserver\<WS-NodeName>\<PIA-Name>.ear\PORTAL\ps\images\portal_pa*

Task 2-14-4: Establishing FTP Service for Content Management Image Attachments

To establish FTP service for Content Management image attachments:

1. Establish an FTP service on the machine hosting the Enterprise Portal web server.
2. Set the FTP home directory to be the same as that of the web server's extended path.
 For example, suppose the web server extended directory is as follows: *C:\pshome\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images\portal_pa*.
 If so, then the FTP home directory must be set to the same path as follows: *C:\pshome\webserver\peoplesoft\applications\peoplesoft\PORTAL\ps\images\portal_pa*.

Task 2-14-5: Updating the EPPCM_IMAGE URL Identifier Definition

To update the EPPCM_IMAGE URL Identifier definition to point to the FTP service on the web server:

1. Sign on to PeopleSoft Enterprise Portal from the browser.
2. Navigate to PeopleTools, Utilities, Administration, URLs.
3. Enter *EPPCM_IMAGE* in the URL ID field. Click Search.

4. Update the URL field value to point to the FTP server created on the web server machine. To do this, replace the *user*, *password*, and *localhost* values with the actual values matching your FTP server using the following format: ftp://user:password@localhost. For example: ftp://paftp:paftp1@RT-SUN25.

Task 2-15: Configuring Resource Finder

In this task, you adjust the delivered Enterprise Portal HTML file. Follow the steps below to configure the Resource Finder profile page for sites using HTTPS.

To configure the Resource Finder profile page for sites using HTTPS:

Note. If you are using HTTPS/SSO, you must add a line to an HTML file that supports the Resource Finder profile page to prevent JavaScript cross-domain security violations.

In the htm file: <web server PORTAL application root directory>/ps/images/portal_pa/EPX_CALENDARPAGE.htm, add the line in italics below, replacing <domain name> with your web server's domain.

```
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
```

```
<script language='JavaScript'>
```

```
document.domain = "web server domain name";
```

```
</script>
```

For example, if the web server domain was peoplesoft.com, the change would appear as follows:

```
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
```

```
<script language='JavaScript'>
```

```
document.domain = "peoplesoft.com";
```

```
</script>
```

See Also

PeopleSoft Enterprise Portal 8.9 PeopleBook: Enterprise Portal Resource Finder

Task 2-16: Updating Enterprise Portal Options

PeopleSoft Enterprise Portal features store the last updated ID value for entered content. These values must be set to match the delivered system data.

Note. Perform this task only for your Enterprise Portal (PA) *system* database. Do not run this against your demo database.

To update Enterprise Portal options:

1. Use Data Mover to sign on to your Enterprise Portal (PA) system database.
2. Open the <PS_HOME>\scripts\ PORTAL_SYSOPTIONS.DMS script.

3. Follow the directions very carefully as outlined in the script text.
4. Run this script against the Enterprise Portal (PA) system database.
5. Close Data Mover.

Task 2-17: Removing Demo Portal Registry Data

This section discusses:

- Removing Demo Portal Registry Data
- Cleaning the System Data

The registered Company News pagelet, news sections, and news articles are delivered as demo data. The demo pagelet must be removed from the portal registry since it is not operable without the accompanying demo sections and articles. During the implementation, you will create news publication pagelets and sections to match your needs.

The demo database contains a portal site that must be removed from the system database. During the implementation, you can create portal sites to match your needs.

Note. Perform this task only for your Enterprise Portal *system* database.

Note. For more information about creating a news publication pagelet, see *PeopleSoft Enterprise Portal PeopleBook*, "Working With News Publications." For more information about creating sites, see *PeopleSoft Enterprise Portal PeopleBook*, "Using Site Management."

Task 2-17-1: Removing Demo Portal Registry Data

To remove demo portal registry data:

1. Sign on to the demo database in PeopleSoft Application Designer.
2. Select File, Open.
3. In the Definition field, select *Project*. Click Open.
4. In the Name column, select the *PORTAL_PASYSDEL* project. Click Open.
5. Select Tools, Copy Project, To Database.
6. Enter the name of your system Enterprise Portal database, user ID, and password. Click OK.
7. Click Select All.
8. Click Copy. This may take a few minutes.

Note. When you click Copy, a dialog box displays informing you that the project already exists. Click Yes to continue to copy the project to your system database. Although the project already exists, copying the *PORTAL_PASYSDEL* project into your system database will delete the intended objects.

9. Close PeopleSoft Application Designer.

Task 2-17-2: Cleaning the System Data

To clean the system data:

Note. Run this script *after* copying the PORTAL_PASYSDEL project.

1. Sign to your Enterprise Portal (PA) system database using Data Mover.
2. Open the Data Mover script <PS_HOME>\scripts\ PORTAL_PASYS_CLEAN.DMS.
3. Run this script against the Enterprise Portal (PA) system database.
4. Close Data Mover.

Task 2-18: Cleaning Homepage Tab Definitions

This section discusses:

- Cleaning the Homepage Tab Definitions
- Refreshing the Web Server Cache and Deleting the Application Server Cache

Task 2-18-1: Cleaning the Homepage Tab Definitions

To clean the Homepage Tab definitions:

1. Sign on to your Enterprise Portal (PA) database using Data Mover.
2. Open the <PS_HOME>\scripts\ PORTAL_HP_TAB_CLEAN.DMS script.
3. Run this script against the Enterprise Portal (PA) database.
4. Close Data Mover.

Note. When running a Data Mover script that affects the portal registry, you will need to refresh the web server cache and delete the application server cache for the change to be reflected. See the following subtask.

Task 2-18-2: Refreshing the Web Server Cache and Deleting the Application Server Cache

To refresh the web server cache and delete the application server cache:

1. Stop the Enterprise Portal (PA) database web server.
2. Stop the Enterprise Portal (PA) database application server.
3. Delete the Enterprise Portal (PA) database application server cache folder and contents.
4. Start the Enterprise Portal (PA) database application server.
5. Start the Enterprise Portal (PA) database web server.

CHAPTER 3

Installing Single Sign-On

This chapter discusses:

- Prerequisites
- Utilizing the Network Domain Name
- Adding the Content Provider URI Path to the Enterprise Portal Database
- Renaming and Configuring Password Authentication for the Default Local Node in the PeopleSoft Enterprise Portal
- Configuring the Enterprise Portal Default Local Node in Your Content Provider Database
- Configuring Enterprise Portal URI Text in the Content Provider
- Setting Up Common User IDs
- Testing Single Sign-On to the Content Provider
- Troubleshooting Single Sign-On

Note. PeopleSoft databases that contain application transaction content are referred to as *Content Provider* databases. Content Provider database transactions are accessed by the Enterprise Portal (PA) database by way of Content Reference pointers.

8.4x content provider refers to a PeopleSoft application database on PeopleTools release 8.4x.

8.1x content provider refers to a PeopleSoft application database on PeopleTools release 8.1x and 8.2x.

Warning! Complete the tasks in this chapter *after* you have successfully set up the application server and web server installations for your Enterprise Portal (PA) database *and* your Content Provider databases.

See the "Installing the PeopleSoft Enterprise Portal" chapter in this installation guide.

Additional information is available in *PeopleTools 8.4x Installation Guide*, "Configuring the Application Server on Windows or *PeopleTools 8.4x Installation Guide*, "Configuring the Application Server on UNIX" and *PeopleTools 8.4x Installation Guide*, "Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode" or *PeopleTools 8.4x Installation Guide*, "Setting Up the PeopleSoft Pure Internet Architecture in Console Mode."

Prerequisites

Complete the tasks in this chapter after you have successfully installed the Content Provider and Enterprise Portal (PA) databases, as well as the application servers and web servers.

Enterprise Portal (PA) database access to additional PeopleSoft databases is accomplished through content providers and single sign-on. Single sign-on allows users to access the multiple Content Provider databases from the Enterprise Portal (PA) database without having to sign on to each database.

For the Enterprise Portal (PA) database single sign-on to access databases on *different* physical web server machines, the following elements must be in place:

- The Enterprise Portal (PA) and Content Provider database web server configuration.properties files include the full network domain name.
- The Enterprise Portal (PA) database contains the Content Provider database's mapped URI, which includes the full network domain name.
- The Enterprise Portal (PA) database's default local node is configured with password authentication in the Enterprise Portal (PA) and Content Provider databases.
- The Enterprise Portal (PA) database and the Content Provider database contain common user IDs.
- The Content Provider database lists the Enterprise Portal (PA) database's default local node as trusted.
- In addition to the requirements listed above, for Enterprise Portal (PA) and Content Provider databases on PeopleTools 8.46 or higher, the Content Provider database must contain the Enterprise Portal (PA) database's mapped URI, which includes the full network domain name.

For the Enterprise Portal (PA) database single sign-on to access databases on the *same* web server machines, the following elements must be in place:

- The Enterprise Portal (PA) database must contain the Content Provider database's mapped URI.
- The Enterprise Portal (PA) database's default local node is configured with password authentication in the Enterprise Portal (PA) and Content Provider databases.
- The Enterprise Portal (PA) database and the Content Provider database contain common user IDs.
- The Content Provider database lists the Enterprise Portal (PA) database's default local node as trusted.
- In addition to the requirements above, Enterprise Portal (PA) and Content Provider databases on PeopleTools 8.46 or higher must also have the following in place: The Content Provider database must contain the Enterprise Portal (PA) database's mapped URI, which includes the full network domain name.

Task 3-1: Utilizing the Network Domain Name

Single sign-on is implemented using browser cookies. Consequently, the web server must be configured such that the user's browser sends the single sign-on cookie to each web server machine to which the user wants single sign-on access. By default, the browser only sends cookies back to the machine that set the cookie.

Note. Perform this task only if the web servers for your Enterprise Portal (PA) database and any single Content Provider database reside on *different* machines.

For databases whose web servers reside on different machines, the network domain name must be utilized in the web server configuration. The localhost name must be extended to include the full domain name by appending the domain name to the hostname of the web server machine name. For example, assume the following:

- The Enterprise Portal (PA) web server machine localhost name is *myserver1*.
- The Content Provider web server machine localhost name is *myserver2*.
- The network full domain name is *mydomain.com*.

If web server myserver1.mydomain.com sets a cookie (the user types their ID and password into the sign-on page of the Enterprise Portal (PA) web server myserver1), then the browser will only send the cookie back to myserver1.mydomain.com. The browser won't send the cookie to myserver2.mydomain.com. To have the browser send the single sign-on cookie to all servers in the network domain, you must use the Authentication Token Domain.

Note. Based on the way your network is set up, you may be able to access the localhost value of myserver.mydomain.com (network domain name) by way of a browser only if your web server "myserver" has a static IP address and an entry in the DNS names server.

Without a DNS names server entry, browsers in the network domain can access the Enterprise Portal (PA) database only if the browser machine's Hosts file includes a line specifying the IP address of the Enterprise Portal (PA) web server machine. For more information, see *PeopleTools PeopleBook: Internet Technology* and *PeopleTools PeopleBook: Security*.

Note. When using the network domain name, you must set the Authentication Token Domain for the Enterprise Portal (PA) database AND the accessed Content Provider databases by specifying an Authentication Token Domain during the PeopleSoft Pure Internet Architecture setup or by adjusting the Authentication Domain property on the General tab of the Web Profile Configuration page located at PeopleTools, Web Profile. For more information about the PeopleSoft Pure Internet Architecture setup, see *PeopleTools 8.4x Installation Guide*, "Setting Up the PeopleSoft Pure Internet Architecture on Windows" or *PeopleTools 8.4x Installation Guide*, "Setting Up the PeopleSoft Pure Internet Architecture on UNIX." For more information about manually adjusting the Authentication Domain, see *PeopleTools PeopleBook: Internet Technology*.

Note. When setting the Authentication Token Domain in the *Content Provider* database's web server configuration, the content provider URL path in the Enterprise Portal (PA) database must include the network domain name as part of the localhost value. See the "Update the Content Provider URL Path" task in this chapter.

Note. When setting the Authentication Token Domain in the *Enterprise Portal (PA)* database's web server configuration, the browser's URL address must include the network domain name as part of the localhost value. See the "Test Single Sign-On to the Content Provider" task in this chapter.

Task 3-2: Adding the Content Provider URI Path to the Enterprise Portal Database

This section discusses:

- Understanding Adding the Content Provider URI Path to the Enterprise Portal Database
- Updating Content Provider URI Paths

Understanding Adding the Content Provider URI Path to the Enterprise Portal Database

The Enterprise Portal (PA) database must contain a URI mapping to the accessed content provider database. The content provider URI is derived from the content provider's web server localhost and the content provider's directory or site name where you installed the PeopleSoft web server files.

Task 3-2-1: Updating Content Provider URI Paths

To update content provider URI paths:

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Use the table below to determine your message node name. Open the *Content Provider* message node.

Content Provider Database	Message Node Name
Budget Planning	BP
Customer Information Systems	CIS
Customer Relationship Management	CRM
Enterprise Incentive Management	EIM
Enterprise Learning Management	ELM
Enterprise One	ENTERPRISE_ONE
Enterprise Performance Management	EPM
Financials/Supply Chain Management	ERP
Front Office	FO
Human Capital Management	HRMS
Student Administration	SA

4. On the Node Definitions tab, verify that the Node Type field value is set to *PIA* for Content Providers on 8.4x tools or *ICType* for Content Providers on 8.1x tools.
5. On the Portal tab, enter content URI text using the following example: `http://localhost/psc/<site name>/` where *<site name>* is the name given to the site during the PeopleSoft Pure Internet Architecture installation.
 Example for Port 80: `http://myserver/...`
 Example for Port other than 80: `http://myserver:8080/...`
 Example for Port 80 with a network domain name: `http://myserver.mydomain.com/...`
 Example for Port other than 80 with a network domain name: `http://myserver.mydomain.com:8080/...`
6. Perform the same steps to enter portal URI text using the following example: `http://localhost/psp/<site name>/`, where *<site name>* is the name given to the site during the PeopleSoft Pure Internet Architecture installation.

Note. The content URI is used to deliver PeopleSoft content with no template wrapping. The portal URI text is used to create the full URL to deliver PeopleSoft content wrapped in a PeopleSoft template. Both URIs are required when connecting to a Content Provider database.

Task 3-3: Renaming and Configuring Password Authentication for the Default Local Node in the PeopleSoft Enterprise Portal

This section discusses:

- Renaming the Enterprise Portal Database Default Local Node
- Configuring the Authentication Password in the Enterprise Portal Database

Single sign-on and PeopleSoft Integration Broker (messaging) use the same default local node. Each application database is delivered with a default local node that uses the naming convention `PSFT_XX`, where `XX` is the database identifier. For your system to distinguish between multiple copies of the same database, the default local node can be renamed to reference the given instance of the PeopleSoft database. We recommend using the database name when renaming the default local node.

For single sign-on to work, you must configure password authentication for the Enterprise Portal default local node in the Enterprise Portal (PA) and Content Provider databases. The password can be any combination of characters, numbers, or symbols; as long as the password is the same on the Enterprise Portal (PA) and Content Provider databases for the Enterprise Portal default local node.

Message nodes that are actively being used (contain queued messages) cannot be renamed until the message queues are cleared.

Task 3-3-1: Renaming the Enterprise Portal Database Default Local Node

To rename the Enterprise Portal database default local node:

Note. You can only rename database message nodes. You cannot rename content provider message nodes.

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Click Search.
4. Select the node name you want to rename. The database's default local node contains the default local node value of `Y`. The delivered default local node for the Enterprise Portal (PA) database is `PSFT_PA`.
5. On the Node Definition tab, click the Rename button.
6. Enter the new name for the Enterprise Portal (PA) database's default local node. We recommend using the database name as the new node name. Enter the value in uppercase with no spaces.
7. Click Save.

Note. You cannot rename message nodes that contain queued messages. If you get the following error message, "<Node name> is in use by the Publish/Subscribe system. It may not be renamed," you cannot rename the node until you clear all queued messages on that message node.

Task 3-3-2: Configuring the Authentication Password in the Enterprise Portal Database

To configure the authentication password in the Enterprise Portal database:

1. From your browser, sign on to your Enterprise Portal (PA) database
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Click Search.
4. Select the Enterprise Portal's default local node. The default local node contains the default local node value of *Y*. The Enterprise Portal (PA) database's delivered default local node is *PSFT_PA*. Be sure to use the node name that you used when you renamed the Enterprise Portal (PA) database's default local node. The new node name is likely to be the same as your Enterprise Portal (PA) database name.
5. In the Authentication Option field on the Node Definition tab, select the *Password* value.
6. In the Password field, enter *<Node Password>*, and press the TAB key.
7. In the Confirm Password field, enter *<Node Password>*.
8. Click Save.
9. Stop the Enterprise Portal (PA) database's web server.
10. Start the Enterprise Portal (PA) database's web server.

Task 3-4: Configuring the Enterprise Portal Default Local Node in Your Content Provider Database

This section discusses:

- Signing on to Your Content Provider Database
- Renaming the Enterprise Portal Database Default Local Node in the Content Provider Database
- Trusting the Enterprise Portal Default Local Node in Databases on PeopleTools 8.1x
- Trusting the Enterprise Portal Default Local Node in Databases on PeopleTools 8.4x
- Configuring the Authentication Password in the PeopleTools 8.1x Content Provider Database
- Configuring the Authentication Password in the PeopleTools 8.4x Content Provider Database

Task 3-4-1: Signing on to Your Content Provider Database

To sign on to your Content Provider database:

1. Open your browser.
2. Enter the URL for the Content Provider database. The URL uses the format `http://localhost/pshome/signon.html`.

Replace *localhost* with the hostname of the web server machine where the Content Provider database web server files are installed.

Replace *pshome* with the site name of the Content Provider database web server files. The default value is *ps* for 8.4x PeopleTools databases and *peoplesoft8* for 8.1x PeopleTools databases.

Note. If the web server for the Content Provider database is using an Authentication Token Domain, then the localhost value must include the network domain name in the URL. If the web server for the Content Provider database is using an HTTP port other than the default port of 80, then the localhost value must contain the port number in the URL.

For example, if the URL address is `http://myserver/pshome/signon.html`, then use the URL address: `http://myserver.mydomain.com/pshome/signon.html`. If the URL address is `http://myserver:8080/pshome/signon.html`, then use the URL address: `http://myserver.mydomain.com:8080/pshome/signon.html`.

3. Enter the superuser user ID and user password values on the sign-on screen. For example, *VPI/VPI*.

For 8.1x PeopleTools databases, the three-column navigation appears.

For 8.4x PeopleTools databases, the database's homepage displaying the Menu pagelet appears.

Trusting the Enterprise Portal database's default local node involves the following set of subtasks:

For single sign-on to work, each Content Provider database (on PeopleTools 8.1x, 8.2x, or 8.4x) must list the Enterprise Portal database's default local node as trusted.

Note. If your Content Provider database contains content that is to be used by multiple Enterprise Portal databases, the following subtasks can be repeated for each additional Enterprise Portal database's default local node. For example, if you have installed an Employee Portal and a Supplier Portal in two separate Enterprise Portal database instances, you may want to access a single Financials/Supply Chain Management database from both of the Enterprise Portal (PA) database instances.

If you renamed the default local node in the Enterprise Portal database, you must also rename the default local node in the Content Provider database.

Message nodes that are actively being used (contain queued messages) cannot be renamed until the message queues are cleared.

Note. You can only rename database message nodes. You cannot rename content provider message nodes.

Task 3-4-2: Renaming the Enterprise Portal Database Default Local Node in the Content Provider Database

To rename the Enterprise Portal database default local node in the Content Provide database:

1. From your browser, sign on to the Content Provider database.
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Click Search.
4. Select the node name you want to rename. This is the original node name of the default local node you renamed in the Enterprise Portal database. The delivered default local node for the Enterprise Portal (PA) database is *PSFT_PA*.
5. On the *Node Definition* tab, click the Rename button.
6. Enter the new name you want to use for the Enterprise Portal (PA) database's default local node in the Content Provider database. This should be the same value that you used to rename the default local node in the Enterprise Portal database. The value we recommended you use as the new node name in the Enterprise Portal database is the database name. Enter the value in uppercase with no spaces.

7. Click Save.

Note. You cannot rename message nodes that contain queued messages. If you get the following error message, "<Node name> is in use by the Publish / Subscribe system. It may not be renamed," you cannot rename the node until you clear all queued messages on that message node.

Task 3-4-3: Trusting the Enterprise Portal Default Local Node in Databases on PeopleTools 8.1x

To trust the Enterprise Portal default local node in databases on PeopleTools 8.1x:

Note. The target database is each content provider application PeopleSoft database on PeopleTools 8.1x that you want to access from your Enterprise Portal (PA) database. Do *not* run the script against any PeopleSoft database on PeopleTools 8.4x.

1. Shut down the target database application server. Delete the target database's application server cache.
2. Use the Data Mover to sign on to the target database.
3. Open the <PS_HOME>\scripts\ PORTAL_NODE_HOST_800.dms script delivered on the PeopleSoft Enterprise Portal 8.9 CD.
4. Replace ALL instances of HOST_DFLT_NODE in this script with the default local node of the Enterprise Portal (PA) database. Be sure to use the node name that you used when you renamed the Enterprise Portal (PA) database's default local node. The new node name is likely to be the same as your Enterprise Portal (PA) database name.
5. Run this script against the target database.
6. Boot the target database's application server.

Task 3-4-4: Trusting the Enterprise Portal Default Local Node in Databases on PeopleTools 8.4x

To trust the Enterprise Portal default local node in databases on PeopleTools 8.4x:

Note. The target database is any content provider application PeopleSoft database on PeopleTools 8.4x that you want to access from your Enterprise Portal (PA) database.

1. From your browser, sign on to your PeopleTools 8.4x Content Provider database.
2. Navigate to PeopleTools, Security, Security Objects, Single Signon.
3. Click Add to insert a new row.
4. Select the Enterprise Portal database's default local node. If you renamed the Enterprise Portal (PA) database's default local node, use the new node name. This new node name is likely to be the same as your Enterprise Portal (PA) database name.
5. Click Save.
6. Reboot the Content Provider database's web server.

Task 3-4-5: Configuring the Authentication Password in the PeopleTools 8.1x Content Provider Database

To configure the authentication password in the PeopleTools 8.1x Content Provider database:

Note. You will need to complete the following steps for each PeopleTools 8.1x Content Provider database for which you want to use single sign-on with the Enterprise Portal (PA) database.

1. Sign on to your PeopleTools 8.1x Content Provider database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. Select the *Message Node* object type.
4. Select the Enterprise Portal database's default local node and click Open. If you renamed the Enterprise Portal (PA) database's default local node, use the new node name. This new node name is likely to be the same as your Enterprise Portal (PA) database name.
5. Select File, Object Properties.
6. Select the Use tab.
7. In the Access Password section, enter *<Node Password>* in the Password field. Use the same password you created in the "To configure authentication password online in the Enterprise Portal database" task above.
8. Enter *<Node Password>* in the Re-verify Password field.
9. Click OK.
10. Select File, Save.
11. Exit PeopleSoft Application Designer.
12. Reboot the Content Provider database's application server and clear the cache.

Task 3-4-6: Configuring the Authentication Password in the PeopleTools 8.4x Content Provider Database

To configure the authentication password in the PeopleTools 8.4x Content Provider database:

Note. You will need to complete the following steps for each Tools 8.4x Content Provider database for which you want to use single sign-on with the Enterprise Portal (PA) database.

1. From your browser, sign on to your PeopleTools 8.4x Content Provider database
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Click Search.
4. Select the Enterprise Portal database's default local node. If you renamed the Enterprise Portal (PA) database's default local node, use the new node name. This new node name is likely to be the same as your Enterprise Portal (PA) database name.
5. On the Node Definition tab, select *Password* in the Authentication Option field.
6. Enter *<Node Password>* in the Password field. Use the same password you created in the "To configure the authentication password online in the Enterprise Portal database" task above. Press the TAB key.
7. Enter *<Node Password>* in the Confirm Password field.

Note. If you are on PeopleTools 8.43 or higher, proceed to Step 8.

If you are not on PeopleTools 8.43 or higher, mmclick Save and reboot the Content Provider database's web server to finish.

8. Select the Portal Content tab.
9. Enter both the content URI text and portal URI text values that correspond to the Enterprise Portal (PA) database web server.

- a. The content URI uses the `.../psc/...` format. For example, Content URI Text = `http://<someserver>/psc/<site name>/`
- b. The portal URI uses the `.../psp/...` format. For example, Portal URI Text = `http://<someserver>/psp/<site name>/`

Replace the `<someserver>` value with the hostname of your Enterprise Portal (PA) database web server. Include the port number and network domain name, if needed.

Replace the `<site name>` value with the directory in which you installed the PeopleSoft web server files for your Enterprise Portal (PA) database. Do not forget to use the trailing `"/` character.

10. Click Save.
11. Reboot the Content Provider database's web server.

Task 3-5: Configuring Enterprise Portal URI Text in the Content Provider

PeopleTools 8.43 changed the way PeopleSoft Enterprise Portal interacts with the content provider. It is no longer required to configure a "remote node" in the Content Provider database to access content references and pagelets in the Enterprise Portal. You can allow user access to content provider data through PeopleSoft Enterprise Portal or the navigation delivered in the Content Provider database. To use single sign-on, you need to configure PeopleSoft Enterprise Portal's content and portal URI text for the appropriate portal registry node.

Note. The content provider portal registries should not be hosted by a remote node.

Note. The following steps are for environments in which the Enterprise Portal and Content Provider databases are on PeopleTools 8.46 or higher.

To configure Enterprise Portal URI text in the content provider:

1. From your browser, sign on to your 8.4x Content Provider database.
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Click Search.
4. Select the appropriate portal registry node for the portal definition you are using. The PARTNER portal registry is available in PeopleTools 8.45 or higher.

Portal Name	Node Name
EMPLOYEE	EMPL
CUSTOMER	CUST
SUPPLIER	SUPP
PARTNER	PART

5. Select the Portal Content tab.
6. enter both the content URI text and portal URI text values that correspond to the Enterprise Portal (PA) database web server.
 - a. The content URI uses the `.../psc/...` format. For example, Content URI Text = `http://<someserver>/psc/<site name>/`
 - b. The Portal URI uses the `.../psp/...` format. For example, Portal URI Text = `http://<someserver>/psp/<site name>/`

Replace the `<someserver>` value with the hostname of your Enterprise Portal (PA) database web server. Include the port number and network domain name, if needed.

Replace the `<site name>` value with the directory in which you installed the PeopleSoft web server files for your Enterprise Portal (PA) database. Do not forget to use the trailing `"/` character.
7. Click Save.
8. Reboot the Content Provider database's web server.

Task 3-6: Setting Up Common User IDs

To add or update the common user ID VPI:

1. From your browser, sign on to each applicable Content Provider database to which you want to connect from your Enterprise Portal (PA) database.
2. In the Content Provider database, navigate to the PeopleTools User Profiles page. For 8.1x Tools databases, select PeopleTools, Maintain Security, Use, User Profiles. For 8.4x Tools databases, select PeopleTools, Security, User Profiles, User Profiles.
3. On the Add a New Value tab, enter *VPI* in the User ID field. Click Add.
4. If this message displays, "The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above," select the *VPI* user ID value in the search results.
5. On the General tab, update the following settings:
 - a. If the Symbolic ID field is blank, select the symbolic ID for your database.
 - b. Enter the password *VPI*.
 - c. Confirm the password *VPI*.
6. On the ID tab, if the ID Type field is blank, select *None*. If the ID Type field is not blank, leave it as is.
7. For 8.1x PeopleTools databases, on the Administrator tab, ensure that the Is User System Administrator? option is selected.

Note. For HRMS or LS 8.1x Content Provider databases, setting user ID *VPI* as a system administrator will not give you access to all application transactions. You must also insert the same roles for *VPI* that exist for the user ID *PS*.

8. For 8.4x PeopleTools databases, insert the PeopleSoft Administrator role if it does not already exist on the Roles tab. Do not remove any existing roles.
9. Click Save.

Task 3-7: Testing Single Sign-On to the Content Provider

To test single sign-on:

1. From your browser, sign on to the Enterprise Portal (PA) database. The URL uses the following format: `http://localhost/pshome/signon.html`.
2. For each applicable PeopleSoft content provider, navigate to Portal Administration, Test, Single Sign On, <Content Provider> User Profiles.
3. The Search dialog box for the User Profile page for that Content Provider database appears.

Note. The User Profiles transaction pages are being directly accessed from the Content Provider database.

Task 3-8: Troubleshooting Single Sign-On

To troubleshoot single sign-on:

1. Check the license code.

Ensure the license code is not blank. The WEBLIB functions used to access the Portal Home page require a valid license code.

You can query the database by way of an SQL query tool by running the following SQL against the database: `SELECT LICENSE_CODE FROM PSOPTIONS`.

2. Check the Message Nodes.
 - a. Ensure that the message nodes that exist on multiple PeopleSoft databases are the same. This means that the node name, the password, the PeopleTools version, and the Application Release properties are an exact match in both the Enterprise Portal (PA) and the Content Provider database.

You can access the 8.4 Message Node definition online by navigating to: PeopleTools, Portal, Node Definitions.

You can access the 8.1x Message Node definitions from PeopleSoft Application Designer by opening the Message Node object.

You can query the database using an SQL query tool by running the following SQL against the database: `SELECT * FROM PSMSGNODEDEFN`.

- b. Ensure that the Enterprise Portal (PA) database's local default message nodes are inserted as trusted into all the Content Provider databases you are accessing by way of single sign-on.

You can check which Message Nodes are trusted in an 8.4x PeopleTools database online by navigating to PeopleTools, Security, Security Objects, Single Signon.

You can check which Message Nodes are trusted in an 8.1x PeopleTools database online by navigating to PeopleTools, Maintain Security, Setup, Single Sign on.

You can query the database using an SQL query tool by running the following SQL against the database: `SELECT * FROM PSTRUSTNODES`.

- c. Ensure that the content provider message node on the Enterprise Portal (PA) database has the correct Node Type. Ensure that the node is active.

Content provider nodes for databases on PeopleTools 8.1x must have a Node Type of *ICT (ICType)*.

Content provider nodes for databases on PeopleTools 8.4x must have a Node Type of *PIA*.

Verify the node information online by navigating to PeopleTools, Portal, Node Definitions. Select the Node Definition tab to view the Node Type and active status settings.

You can query the database using an SQL query tool by running the following SQL against the database: `SELECT * FROM PSMSGNODEDEFN`.

- d. Ensure that the Enterprise Portal database's default local node in the Enterprise Portal and Content Provider databases use password authentication and also use the same password.

Because the password is encrypted when you enter it, you will need to reenter the password in Enterprise Portal and all Content Provider databases. Be sure to use the same capitalization and check that CAPS LOCK is not activated when you enter your password.

To reenter your password in the Enterprise Portal, navigate to PeopleTools, Portal, Node Definitions. Select the Node Definition tab.

To reenter your password in your Content Provider database on PeopleTools 8.4x, navigate to PeopleTools, Portal, Node Definitions. Select the Node Definition tab.

To reenter your password in your Content Provider database on PeopleTools 8.1x, open the message node definition for the Enterprise Portal default local node in the Content Provider database using PeopleSoft Application Designer. Open the Properties for the message node and reenter the password on the Use tab.

Note. Messaging also uses the database's local message node value. Changing the value of which message node is the Local Node affects both the portal sign-on and messaging.

3. Check the content reference URL.

- a. Check the registry structure for the menu item (content reference). Ensure that the registry structure contains the correct syntax in the URL text for the PeopleTools version of the Content Provider database.

Access the registry structure by navigating to PeopleTools, Portal, Structure and Content. Ensure that the menu, market, and component are correctly displayed online.

Run the following using your SQL query tool:

```
SELECT PORTAL_NAME, PORTAL_LABEL, PORTAL_OBJNAME,
PORTAL_CNTPRV_NAM, PORTAL_URLTEXT FROM PSPRSMDDEFN
WHERE PORTAL_REFTYPE = 'C'
AND PORTAL_CNTPRV_NAM IN
('BP', 'CRM', 'ELM', 'EPM', 'ERP', 'GFHA', 'HRMS', 'SA', 'SAHA', 'VAN')
AND PORTAL_LABEL = '<Fill in the link label you are testing>'
```

The URL text for content references on PeopleTools 8.1x uses the following format:

ICType=Panel&Menu=MAINTAIN_SECURITY&Market=GBL&PanelGroupName=USERMAINT&ParamName=ParamValue

The URL text for content references on PeopleTools 8.4x is uses the following format:

c/MAINTAIN_SECURITY.USERMAINT.GBL?ParamName=ParamValue

- b. Check the content provider URI text in the Enterprise Portal (PA) database.

Access content provider URI text information by navigating to PeopleTools, Portal, Node Definitions. Select the Portal Content tab to view content URI text.

You can query the database using an SQL query tool by running the following SQL against the database: `SELECT * FROM PSNODEURITEXT`.

Check that the content provider URI paths for databases with web servers on different machines utilize the full network domain name.

Check that the web server name used in the configuration.properties file and the content provider URI paths use the same capitalization format. This problem will manifest itself as the web server error: "Unable to open page."

4. Check the local node properties and uses.

- a. Check the local default node.

The PORTAL_NAME for the local node must match the default portal in the Enterprise Portal (PA) database. The NODE_TYPE must be PIA.

You can query the database using an SQL query tool by running the following SQL against the database: `SELECT MSGNODENAME, LOCALNODE, LOCALDEFAULTFLG, NODE_TYPE, PORTAL_NAME FROM PSMSGNODEDEFN`.

This problem will manifest itself as the error: "Could not open registry."

- b. Check the Hosted by Node of the different portal registries.

A local node should host each Enterprise Portal (PA) database portal registry. The PORTAL_REMOTE value should be set to 0.

You can query the database using an SQL query tool by running the following SQL against the database: `SELECT * FROM PSPRDMDEFN`.

This problem will manifest itself as the error: "Could not open registry."

Note. This is the expected behavior for accessing any 8.4x content provider's homepage if you have set the 8.4x content provider's portal registry to be hosted by a remote node. In this case, access to the 8.4x content provider is achieved only through the Enterprise Portal.

5. Check use of different web server HTTP port numbers.

The browser may have an issue with single sign-on in the following scenario: The Enterprise Portal database and the Content Provider database are using the same web server, but the Content Provider database's web server configuration has a different HTTP port; `http://myserver:5000/`, for example.

To resolve this issue, do one of the following:

- a. Move one of the web servers to a different machine.
- b. Add a second DNS entry for the web server and use a different name. Ensure that the two DNS entries share a common domain and set the `authtokendomain` in the configuration.properties file for the web server accordingly.

- c. Set the defaultPort setting in the configuration.properties file on the Content Provider web server to the HTTP/HTTPS port value on which the web server is running. Normally, if you are not using a reverse proxy server or SSL accelerator, you should not have to set the defaultPort property. However, it can be set in this situation.
6. Check the Content and Portal URI text in the Content Provider database for the Registry Node. If you are able access the content provider using the User Profile test links, but your pagelets are not displaying correctly, you will need to configure the Content and Portal URI text in the Content Provider database for the Registry Node.

CHAPTER 4

Accessing PeopleSoft Content Providers

This chapter discusses:

- Understanding PeopleSoft Content Provider Access
- Enabling the 8.4x Content Provider Homepage Personalization (Required)
- Accessing the Content Provider By Way of a Single Link (Recommended)
- Determining the Enterprise Portal Database's Default Portal (Required)
- Installing the 8.1x Content Provider Portal Pack Project (Recommended)
- Installing the 8.1x Content Provider Navigation Project (Reference)
- Installing the 8.4x Content Provider Portal Project (Reference)
- Maintaining Roles and User IDs (Reference)

Note. PeopleSoft application databases that contain transaction content are referred to as the *Content Provider* databases.

8.4x content provider refers to PeopleSoft application databases on PeopleTools release 8.4x.

8.1x content provider refers to PeopleSoft application databases on PeopleTools release 8.1x, 8.2x.

Warning! Complete the tasks in this chapter *after* you have successfully tested single sign-on to the applicable content provider. For more information, see the "Installing Single Sign-On" chapter in this installation guide. If your Enterprise Portal (PA) database is not connecting to any PeopleSoft Content Provider databases, you can skip this chapter and the associated appendixes.

Understanding PeopleSoft Content Provider Access

The PeopleSoft Enterprise Portal allows direct access to your PeopleSoft Content Provider databases from the portal. This direct access includes homepage pagelets and navigation. The method of access can be either a single link from the portal navigation pointing into the content provider's navigation, or physically storing the content provider registry data within the PeopleSoft Enterprise Portal.

Physically storing the registry data within the PeopleSoft Enterprise Portal allows you to have your entire navigation in an aggregated location. However, using the single link approach greatly increases the simplicity of your security setup as well as future upgrades. For these reasons, we recommend that navigation to the content provider be accomplished by way of a single link within the Enterprise Portal (PA) database.

To facilitate the recommended approaches to accessing the Content Provider database, the tasks in this chapter use the following notations.

Required	Performed during the <i>installation</i> phase. This is required for subsequent tasks. (Applies to Tasks 1 and 3.)
Recommended	<p>Performed during the <i>installation</i> and <i>implementation</i> phases. This indicates the recommended approach. (Applies to Tasks 2 and 4.)</p> <ul style="list-style-type: none"> • We recommend that you access the 8.1x content provider navigation registry data by way of a single link in the Enterprise Portal database. • We recommend that you access the 8.4x content provider portal registry data by way of a single link in the Enterprise Portal database. • We recommend that you physically load the 8.1x content provider portal pack registry data into the Enterprise Portal database due to architectural changes between 8.1x and 8.4x PeopleTools releases. This is applicable only if you have purchased an 8.1x content provider Portal Pack product.
Reference	<p>Optionally performed during the <i>implementation</i> phase. Indicates that the material is listed in this guide only as a reference. (Applies to Tasks 5, 6, 7 and 8.)</p> <ul style="list-style-type: none"> • It is technically possible to access the 8.1x Portal Packs from within the 8.1x content provider. This entails enabling the portal tools and setting up additional content provider websites within the 8.1x content provider. This also entails loading the 8.1x content provider registry data into the 8.1x Content Provider database. For assistance in implementing this configuration, contact PeopleSoft Global Services. • The option to physically store the 8.1x content provider navigation registry data is available. Delivered portal projects have been created in an 8.4x PeopleTools format enabling them to successfully and correctly copy into the Enterprise Portal database on PeopleTools 8.4x. <p>Instructions for physically storing the 8.4x content provider portal registry data within the Enterprise Portal database are located in the appendixes of this installation guide. The tasks in this chapter point you to the correct documents.</p>

Task 4-1: Enabling the 8.4x Content Provider Homepage Personalization (Required)

This section discusses:

- Updating the 8.4x Content Provider Homepage Security
- Updating the 8.4x Content Provider GUEST User

To view the Portal Pack products within the 8.4x content provider, homepage personalization security access must be granted to all non-guest users.

Note. Only perform this task for the 8.4x Content Provider databases for which you have purchased a Portal Pack.

Task 4-1-1: Updating the 8.4x Content Provider Homepage Security

To update the 8.4x content provider homepage security:

1. Use Data Mover to sign on to the 8.4x Content Provider database.
2. Open the <PS_HOME>\scripts\PORTAL_HP_PERS.DMS script, which was delivered on the PeopleSoft Enterprise Portal 8.9 CD.
3. Run this script against the 8.4x Content Provider database.
4. Open the <PS_HOME>\scripts\PORTAL_ADD_ROLE.DMS script, which was delivered on the PeopleSoft Enterprise Portal 8.9 CD.
5. Run this script against the 8.4x Content Provider database.
6. Close Data Mover.

Task 4-1-2: Updating the 8.4x Content Provider GUEST User

To update the 8.4x content provider GUEST user:

Note. The PAPP_USER role should be granted to all new user IDs for access to PeopleSoft Enterprise Portal navigation and the homepage personalization pages. After running this script, the role PAPP_USER should be manually removed from any GUEST user ID.

1. From your browser, sign on to each applicable 8.4x Content Provider database.
2. Navigate to PeopleTools, Security, User Profiles, User Profiles.
3. Enter *GUEST* (or the equivalent guest user ID for the database) in the User ID field.
4. Click Search. If the message "No matching values were found," the remaining steps in this task are not applicable
5. Select the Roles tab.
6. Delete the row containing the *PAPP_USER* role.
7. Click Save.

Task 4-2: Accessing the Content Provider By Way of a Single Link (Recommended)

This section discusses:

- Testing the Single Link to the Content Provider
- Hiding a Content Provider Single Link

The Enterprise Portal (PA) database is delivered with a single link to each supported PeopleSoft Content Provider database on each supported PeopleTools release. If you do not own a specified PeopleSoft Content Provider database on a given PeopleTools release, you can hide the content provider single link.

Task 4-2-1: Testing the Single Link to the Content Provider

To test the single link to the content provider:

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. For each applicable PeopleSoft content provider, navigate to PeopleSoft, <Content Provider>.
3. The single <Content Provider> link directs the user to the Content Provider database in the following ways:
 - For Content Provider databases on 8.1x PeopleTools, the <Content Provider> 8 link displays the content provider's PeopleSoft Pure Internet Architecture navigation in the target area.
 - For Content Provider databases on 8.4x PeopleTools, the <Content Provider> 8.4 link opens a new window displaying the homepage of the 8.4x content provider's corresponding portal registry definition.

Note. The portal registry definition refers to the transaction for the intended audience. The EMPLOYEE portal definition is for employee transactions. The CUSTOMER portal definition is for customer transactions. The SUPPLIER portal definition is for supplier transactions. The PARTNER portal definition is for partner transactions. The PARTNER portal definition is available in PeopleTools 8.45 or higher.

Task 4-2-2: Hiding a Content Provider Single Link

To hide a content provider single link:

Note. If you choose to load the 8.4x content provider navigation into the Enterprise Portal database, then do *not* hide the content provider 8.4 PeopleTools single link. The loaded 8.4x content provider registry will not load the PeopleTools navigation, and the single PeopleTools link enables you to access the PeopleTools for the 8.4x content providers from your Enterprise Portal database. You will access the PeopleTools-only navigation from the 8.4x content provider's PS_SITETEMPLATE portal registry.

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Structure and Content.
3. Select the PeopleSoft link in the Folder scroll area.
4. Select the Edit link for the Content Reference link you want to hide.
5. On the Content Ref Administration page, select the Hide from portal navigation option.
6. Click Save.

Task 4-3: Determining the Enterprise Portal Database's Default Portal (Required)

The Enterprise Portal database contains a single default portal. The default portal determines which portal registry is accessible when signing on to the Enterprise Portal database from the browser. Content provider portal data is specific to the default portal registry defined in the Enterprise Portal database.

To determine the default portal:

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Portal Definitions.

3. The Default option is selected for the default portal.
4. Make a note of the Enterprise Portal (PA) database's default portal for use in subsequent tasks in this chapter and the appendixes.

Task 4-4: Installing the 8.1x Content Provider Portal Pack Project (Recommended)

See the "Installing 8.1x Content Provider Portal Pack Projects" appendix in this installation guide for instructions and guidelines on how to install the 8.1x content provider Portal Pack Project(s) into the Enterprise Portal (PA) database.

Note. It is recommended that you access your 8.1x content provider Portal Pack by installing the Portal Pack Project. Only perform this task for the 8.1x content providers for which you have purchased a Portal Pack.

See the "Installing 8.1x Content Provider Portal Navigation Projects" appendix for more information about how to generate the portal project.

Task 4-5: Installing the 8.1x Content Provider Navigation Project (Reference)

See the "Installing 8.1x Content Provider Portal Navigation Projects" appendix in this installation guide for instructions and guidelines on how to install the 8.1x content provider Navigation Project(s) into the Enterprise Portal (PA) database.

Note. Installing the 8.1x content provider Navigation Project is an optional implementation task. We recommend that you use the single link navigation to the 8.1x content providers instead. This task is listed here only as a reference for use during the implementation phase.

Task 4-6: Installing the 8.4x Content Provider Portal Project (Reference)

See the "Installing 8.4x content provider Portal Pack and Navigation Projects" appendix in this installation guide for instructions and guidelines on how to install the 8.4x content provider Portal Project into the Enterprise Portal (PA) database.

Note. Installing the 8.4x content provider Portal Project is an optional implementation task. We recommend that you use the single link navigation to the 8.4x content providers instead. This task is listed here only as a reference for use during the implementation phase.

Note. If you are installing the 8.4 content provider portal project for CRM 8.4, then you must also perform the tasks in the "Installing CRM 8.4x Navigation" appendix in this installation guide after completing the tasks in the "Installing 8.4x Content Provider Portal Pack and Navigation Projects" appendix.

Task 4-7: Maintaining Roles and User IDs (Reference)

To enable users to seamlessly access the Content Provider database from within the Enterprise Portal database, both databases must contain the common user IDs and associated roles. Maintaining roles and user IDs across Enterprise Portal (PA) and Content Provider databases is an implementation task and *not* an installation task. This task is listed here only as a reference for use during the implementation phase.

See the "Maintaining Roles and User IDs Across Databases" appendix in this installation guide for more information on how to maintain roles and user IDs.

APPENDIX A

Removing Content Provider Portal Data

This appendix discusses:

- Understanding Removing Content Provider Portal Data
- Creating the Portal Registry Delete Project Files
- Deleting Prior Release Content Provider Portal Registry Data
- Cleaning the Enterprise Portal Database
- Accessing Current Release Content Providers

Note. PeopleSoft application databases that contain transaction content are referred to as the *Content Provider* databases.

8.4x content provider refers to PeopleSoft application database on PeopleTools release 8.4x.

8.1x content provider refers to PeopleSoft application database on PeopleTools release 8.1x.

Warning! Do not perform this task on a Content Provider application database. This task is specific only to the Enterprise Portal (PA) database. This task will remove the previous application release registry data along with any customizations you may have performed on those registry entries. Removal of prior release content provider data is required before copying delivered registry projects for the current application release.

Understanding Removing Content Provider Portal Data

When you upgrade your Content Provider database, the portal registry data needs to be upgraded in the Enterprise Portal (PA) database. The Enterprise Portal registry data must match the current content provider transactions. To upgrade the Enterprise Portal registry data to match your current release, you will need to copy the Delete project(s) to your Enterprise Portal database and run a script to remove portal registry objects that no longer exist in the current application release.

Once prior release content provider data is removed, you can load the current release content provider portal registry data into the Enterprise Portal (PA) database.

Complete the tasks in this chapter only if all of the following conditions are met.

- Your Enterprise Portal (PA) database is on release Portal Solutions 8.9.
- You have upgraded your Content Provider database after installing the PeopleSoft Enterprise Portal.
- You have loaded a previous release of the content provider application portal registry data into the Enterprise Portal (PA) database.

Task A-1: Creating the Portal Registry Delete Project Files

Before you copy the new content provider navigation and portal pack registry data into your Enterprise Portal 8.9 database, you need to remove the old data. Removing the old data consists of creating a Delete project from the Copy project.

Note. There are no corresponding portal permission Delete projects.

To create the Content Provider Portal Pack and Navigation Delete project:

1. Sign on to your Enterprise Portal (PA) database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. Open the content provider portal pack and navigation *Copy* project(s).

Copy Project Naming Conventions	
PeopleTools 8.4x, includes Navigation and Portal Pack in single project.	PORTAL_<pp>84x_<registryname>, for example: PORTAL_CR84X_EMPL
PeopleTools 8.2x, 8.1x Navigation Data	PORTAL_NAV_<pp><release>_<registryname>84, for example: PORTAL_NAV_HC830_EMPL84
PeopleTools 8.2x, 8.1x Portal Pack Data	PORTAL_PACK_<pp><release>_<registryname>84, for example: PORTAL_PACK_HC830_EMPL84

Note. <pp> represents the Content Provider database identifier. <release> represents the release number for your application. <registryname> represents the portal registry.

4. Select File, Save as....
5. Rename the Copy project file by adding *_DEL* to the end of the Copy project name. For example, PORTAL_CR84X_EMPL_DEL. Click OK.
6. Remove the permission list and folder registry objects from the project definition. You only want to keep content reference objects in the project definition.
7. Change the Action to *Delete* for all of the content references.
8. Select Edit, Upgrade, Set Action for Project, Delete.
9. Click Save Project.
10. Use the Copy Project to File utility to copy the delete project to file.

Note. If you are removing a content provider navigation/portal pack project for a content provider on pre-8.4x PeopleTools, you can retrieve the Delete projects from PeopleSoft Customer Connection under the report ID 100106. Follow the instructions in the posted update to make the portal Delete projects available to your Enterprise Portal database.

The files and folders retrieved from PeopleSoft Customer Connection must be copied into the respective <PS_HOME>\projects and <PS_HOME>\scripts file directories of your Enterprise Portal (PA) application database. These are the same directories in which you installed the PeopleSoft Enterprise Portal 8.9 CD.

Task A-2: Deleting Prior Release Content Provider Portal Registry Data

To copy the portal registry Delete project(s):

Warning! This task will remove the previous application release registry data along with any customizations you may have performed on those registry entries.

1. Sign on to your Enterprise Portal (PA) database in two-tier mode using PeopleSoft Application Designer.
2. Copy only the portal Delete project that corresponds to a previous release of a content provider that you have since upgraded and for which the Portal Registry Delete project name matches the name of a previously copied Portal Registry project. Repeat the following steps for each applicable Delete Portal Project definition.

Note. For pre-8.4x content provider Delete projects, the instructions posted in PeopleSoft Customer Connection in the Updates + Fixes section under report ID 100106 list the delivered Delete Portal Projects and their corresponding Content Provider database and release.

- a. Select Tools, Copy Project, From File.
- b. Navigate to the location you copied the Delete project.
- c. Click OK.
- d. Select the applicable Portal Registry Delete Project name.
- e. Click Open.
- f. Click Select All.
- g. Click Copy.

Note. You do *not* need to create or alter any records or views.

Task A-3: Cleaning the Enterprise Portal Database

This section discusses:

- Deleting Obsolete Folders
- Updating the Version Numbers

The Delete projects only remove content references. Consequently, empty portal registry folders may exist. These empty folders should be removed. After removing portal registry data, the Enterprise Portal (PA) database cache and versioning needs to be updated to reflect the changes.

Task A-3-1: Deleting Obsolete Folders

To delete obsolete folders:

1. In your target Enterprise Portal database, navigate to Portal Administration, Navigation, Delete Empty Folders.

2. Add a run control ID of *FOLDER_CLEAN_XXXX*, where *XXXX* represents the portal registry name, such as EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
3. Enter the portal name that corresponds to the *XXXX* in the run control ID portal registry name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
4. Click Save.
5. Click Run.
6. Set up the Process Scheduler information and click OK.
7. Select the Process Monitor link to view the progress of the process.
8. Delete the Enterprise Portal (PA) database's application server cache.
9. Stop and start the Enterprise Portal (PA) database's web server service.

Task A-3-2: Updating the Version Numbers

To update the version numbers:

From the command line prompt, execute the following Application Engine program, replacing the parameters with those applicable to your Enterprise Portal (PA) database:

```
ps_home\bin\client\winx86\psae -CT <dbtype> -CS <server> -CD  
<dbname> -CO <oprid> -CP <oprid password> -R 1 -AI VERSION -I 1
```

Task A-4: Accessing Current Release Content Providers

See the "Accessing PeopleSoft Content Providers" chapter in this installation guide for instructions and guidelines on accessing PeopleSoft content providers from the Enterprise Portal (PA) database.

APPENDIX B

Installing 8.1x Content Provider Portal Pack Projects

This appendix discusses:

- Retrieving 8.1x Content Provider Portal Pack Project Files
- Copying the 8.1x Content Provider Portal Pack Project
- Updating Enterprise Portal Registry Folder Permissions
- Updating the Portal Default Homepage Tab

Note. PeopleSoft application databases that contain transaction content are referred to as *Content Provider* databases.

8.1x content provider refers to a PeopleSoft application database on PeopleTools release 8.1x.

Warning! The tasks in this appendix must be performed if you have purchased an 8.1x content provider Portal Pack product.

Task B-1: Retrieving 8.1x Content Provider Portal Pack Project Files

The download locations of the necessary 8.1x content provider Portal Pack project files are available from PeopleSoft Customer Connection in the Updates + Fixes section under report ID 100108. Follow the instructions in the posted update. For a multilingual Enterprise Portal (PA) database, be sure to download the multilingual Updates + Fixes version.

The files and folders retrieved from PeopleSoft Customer Connection must be copied into the respective <PS_HOME>\projects and <PS_HOME>\scripts file directories of your Enterprise Portal (PA) application database. These are the same directories in which you installed the PeopleSoft Enterprise Portal 8.9 CD.

Note. As an alternative to using the delivered 8.1x projects in an 8.4x format, you can create these projects in the 8.4x format yourself. The process entails loading the delivered 8.1x registry structures in an 8.1x format into a copy of your production 8.1x Content Provider database and upgrading this database to 8.4x. You then extract the upgraded registry data into the Enterprise Portal database. The advantage of this approach is that the permission list security on upgraded registry structures will be synchronized with what exists in your 8.1x application production database. For more information about this process, see the "Creating 8.1x Content Provider Projects in an 8.4 Format" appendix in this installation guide.

Task B-2: Copying the 8.1x Content Provider Portal Pack Project

The 8.1x content provider Portal Pack project will copy pagelets and pagelet extension pages into the Enterprise Portal database's default portal registry. After copying the Portal Pack project, you must delete the Enterprise Portal database's cache to reflect the changes.

Note. If you have copied a previous release content provider portal registry project into your Enterprise Portal (PA) database, you must remove that registry data. See the "Removing Content Provider Portal Data" appendix in this installation guide for instructions on removing the prior release content provider portal registry data.

To copy the 8.1x Portal Pack project:

1. Sign on to your Enterprise Portal (PA) using PeopleSoft Application Designer.

Note. Repeat the following steps for each applicable project listed in the 8.1x Portal Pack project table below. Applicable projects are those listed in a section or row for a purchased 8.1x Portal Pack and its associated Content Provider database. Copy only the project whose name corresponds with the Enterprise Portal default portal registry.

2. Select Tools, Copy Project, From File.
3. Navigate to <PS_HOME>\Projects.
4. Select the applicable 8.1x Portal Pack project name listed below for the Enterprise Portal database's default portal registry (CUST = CUSTOMER, EMPL = EMPLOYEE, and SUPP = SUPPLIER).

Note. Portal Pack and Navigation projects are combined into _NAV projects for Customer and Supplier portal registries. These projects are marked with an asterisk in the following table. These projects marked with an asterisk are also listed in the "Installing 8.1x Content Provider Portal Navigation Projects" appendix in this installation guide. There is no need to copy the projects more than once.

8.1x Portal Pack	Content Provider	8.1x Portal Pack Project	EMPL	CUST	SUPP
CRM Portal Pack	CRM 8.0	PORTAL_PACK_CR800_EMPL84	X		
CRM Portal Pack	CRM 8.0	PORTAL_NAV_CR800_CUST84 *		X	
CRM Portal Pack	CRM 8.1	PORTAL_PACK_CR810_EMPL84	X		
CRM Portal Pack	CRM 8.1	PORTAL_NAV_CR810_CUST84 *		X	
EPM Portal Pack	EPM 8.3	PORTAL_PACK_PF830_EMPL84	X		
FIN Portal Pack	FSCM 8SP2, SP3	PORTAL_PACK_EP802F_EMPL84	X		

8.1x Portal Pack	Content Provider	8.1x Portal Pack Project	EMPL	CUST	SUPP
FIN Portal Pack	FSCM 8SP2, SP3	PORTAL_NAV_EP802_CUST84 *		X	
SCM Portal Pack	FSCM 8SP2, SP3	PORTAL_PACK_EP802S_EMPL84	X		
SCM Portal Pack	FSCM 8SP2, SP3	PORTAL_NAV_EP802_SUPP84 *			X
HRMS Portal Pack	HRMS 8.3, 8.3 SP1	PORTAL_PACK_HC830_EMPL84	X		

5. Click Open.
6. Click Select All.
7. Click Options.
 - a. On the Copy Options tab, select *English* and *COMMON*. If your Enterprise Portal (PA) database is a multilingual database, then also select the language(s) you have installed on your Enterprise (PA) database.
 - b. Click OK.
8. Click the Copy button.
9. Review the Output window on the Upgrade tab. All objects should have copied successfully.
10. Stop the Enterprise Portal (PA) database's application server.
11. Stop the Enterprise Portal (PA) database's web server.
12. Start the Enterprise Portal (PA) database's web server.
13. Start the Enterprise Portal (PA) database's application server.

Note. You do *not* need to create or alter any records or views.

Task B-3: Updating Enterprise Portal Registry Folder Permissions

This section discusses:

- Updating the Portal Registry Permission Lists
- Deleting the Enterprise Portal Database Cache

Portal data from different Content Provider databases may share a common portal folder. After copying the 8.1x Portal Pack projects, the folder permissions must be updated to reflect the changes. After the folder permissions are updated, you must delete the Enterprise Portal database's cache to reflect the changes.

Task B-3-1: Updating the Portal Registry Permission Lists

To update the portal registry permission lists:

Note. This process may take anywhere from a few minutes to a few hours depending upon the volume of the portal data. The user ID that invokes this process must have the security role Portal Administrator or the process may terminate with an abend.

Note. If you are using PeopleTools 8.44.00 or higher, skip steps four and five. The GUI will not display the options referenced in these steps.

1. In your Enterprise Portal database, navigate to PeopleTools, Portal, Portal Security Sync.
2. Add a run control ID of *SECURITY_SYNC_XXXXXXX*, where *XXXXXXX* represents the portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
3. Enter the portal name matching the *XXXXXXX* of the run control's portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
4. Click Save.
5. Click Run.
6. Set up the Process Scheduler information and click OK.
7. Select the Process Monitor link to view the progress of the process.

Task B-3-2: Deleting the Enterprise Portal Database Cache

To delete the Enterprise Portal database cache:

Note. To be able to view the changes to your Enterprise Portal Registry you need to bounce the application server and clear its cache. In addition, you will need to bounce the web server.

1. Delete the Enterprise Portal (PA) database's application server cache.
2. Stop and start the Enterprise Portal (PA) database's web server service.

Task B-4: Updating the Portal Default Homepage Tab

The copied 8.1x portal pack registry data includes registry entries for pagelets. To access the added pagelets from the homepage, the homepage tab definition must make these pagelets available.

To update the default homepage tab:

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Structure and Content.
3. Navigate within the Structure and Content page to Portal Objects, Homepage, Tabs.
4. Click the Edit link for the My Page tab content reference.
5. On the Tab Content tab, select the Include All check box for all pagelet categories except the PeopleSoft Applications pagelet category.
6. In the PeopleSoft Applications pagelet category group box, define the following settings:
 - a. Clear the Menu pagelet option.

- b. Select the Enterprise Menu pagelet option and select the *Req-Fix* value.
 - c. Select any remaining pagelet options and select the *Optional* value.
7. Click Save.

APPENDIX C

Installing 8.4x Content Provider Portal Pack and Navigation Projects

This appendix discusses:

- Updating 8.4x Content Provider Portal Registry Permission Lists
- Creating the 8.4x Content Provider Portal Project
- Copying the 8.4x Content Provider Portal Project
- Updating Enterprise Portal Registry Folder Permissions
- Updating the Portal Default Homepage Tab

Note. PeopleSoft application databases that contain transaction content are referred to as *Content Provider* databases.

8.4x content provider refers to PeopleSoft application databases on PeopleTools release 8.4x.

Note. If you choose to load the 8.4x Portal Pack registry data, you must also load the 8.4x navigation data for accurate link rendering. The tasks in this chapter enable you to load both portal pack and portal navigation data from an 8.4x content provider database.

Task C-1: Updating 8.4x Content Provider Portal Registry Permission Lists

This section discusses:

- Updating the Portal Registry Permission Lists
- Deleting the 8.4x Content Provider Database Cache

The 8.4x Content Provider databases are delivered with the portal registry data included. This registry data can be updated to accommodate your permission list changes. After updating the portal registry permission lists, you must delete the database cache to reflect the changes.

Note. This process may take anywhere from a few minutes to a few hours, depending upon the volume of the portal data. The user ID that invokes this process must have the security role Portal Administrator or the process may terminate with an abend.

Task C-1-1: Updating the Portal Registry Permission Lists

To update the portal registry permission lists:

1. From your browser, sign on to your 8.4x Content Provider database.

2. Navigate to PeopleTools, Portal, Portal Security Sync.
3. Add a run control ID of *SECURITY_SYNC_XXXXXXX*, where *XXXXXXX* represents the portal registry definition name, for example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
4. Enter the portal definition name matching the *XXXXXXX* of the run control's portal registry name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
5. Click Save.
6. Click Run.
7. Set up the Process Scheduler information and click OK.
8. Select the Process Monitor link to view the progress of the process.

Task C-1-2: Deleting the 8.4x Content Provider Database Cache

To delete the 8.4x Content Provider database cache:

1. Delete the 8.4x Content Provider database's application server cache.
2. Stop and start the 8.4x Content Provider database's web server service.

Task C-2: Creating the 8.4x Content Provider Portal Project

This section discusses:

- Creating the 8.4x Content Provider Portal Project
- Cleaning the 8.4x Content Provider Portal Project in Application Databases on PeopleTools 8.46 or Higher
- Cleaning the 8.4x Content Provider Portal Project in Financials/Supply Chain 8.8, Staffing 8.8, or Customer Relationship Management 8.9
- Cleaning the 8.4x Content Provider Portal Project in All Other Application Databases on PeopleTools 8.45 or Less
- Deleting the 8.4x Content Provider Database Two-Tier Cache

This task entails creating a "catch all" portal registry and permission list project, removing the extraneous project items from the project definition using Data Mover, and clearing the two-tier cache to accurately reflect the project definition.

Task C-2-1: Creating the 8.4x Content Provider Portal Project

To create the 8.4x content provider portal project:

1. Sign on to your 8.4x Content Provider database in two-tier mode using PeopleSoft Application Designer.
2. Select File, New.
3. Select a New Definition value of *Project*. Click OK.
4. Select Insert, Definitions into Project.

5. Select a Definition Type value of *Permission List*. Click Insert.
6. Click Select All, and then click Insert again.
7. Select the Definition Type value of *Portal Registry Definitions*. Click Insert.
8. Select the portal name matching the Enterprise Portal database's default portal name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
9. Highlight the Related Definitions value of *Portal Registry Structures*. Click Insert.
10. Click Close.
11. Select File, Save Project As.
12. Enter the applicable project name from the following table of 8.4 content provider Portal Project names. The PARTNER portal registry is available in PeopleTools 8.45 or higher.

Content Provider on PeopleTools 8.4x	Portal Name	Project Name
CIS	EMPLOYEE	PORTAL_CI84X_EMPL
CRM	EMPLOYEE	PORTAL_CR84X_EMPL
CRM	CUSTOMER	PORTAL_CR84X_CUST
CRM	PARTNER	PORTAL_CR84X_PART
ELM	EMPLOYEE	PORTAL_LM84X_EMPL
EPM	EMPLOYEE	PORTAL_PF84X_EMPL
FSCM	EMPLOYEE	PORTAL_EP84X_EMPL
FSCM	CUSTOMER	PORTAL_EP84X_CUST
FSCM	SUPPLIER	PORTAL_EP84X_SUPP
HRMS	EMPLOYEE	PORTAL_HC84X_EMPL
SFO	EMPLOYEE	PORTAL_FO84X_EMPL
SFO	CUSTOMER	PORTAL_FO84X_CUST

13. Click OK.
14. Close PeopleSoft Application Designer.

Task C-2-2: Cleaning the 8.4x Content Provider Portal Project in Application Databases on PeopleTools 8.46 or Higher

To clean the 8.4x content provider portal project in all application databases on PeopleTools 8.46 or higher:

Warning! Before exporting the 8.4x content provider portal project from the Content Provider database, you *must* run the Clean Portal Project process against the Content Provider database.

1. In your content provider database navigate to PeopleTools, Portal, Portal Utilities, Clean Portal Project.
2. Add a run control ID of *CLEAN_PORTAL_XXXXXXX*, where *XXXXXXX* represents the portal definition name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
3. Enter the Project Name you created above; *PORTAL_EP84X_EMPL*, for example.
4. Enter a Portal Name; *EMPLOYEE*, for example.
5. Enter a Content Provider Name; *ERP*, for example.
6. Select Full Navigation.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Note. Continue with *Deleting the 8.4x Content Provider Database Two-Tier Cache* task.

Task C-2-3: Cleaning the 8.4x Content Provider Portal Project in Financials/Supply Chain 8.8, Staffing 8.8, or Customer Relationship Management 8.9

To clean the 8.4x content provider portal project in *Financials/Supply Chain 8.8*, *Staffing 8.8*, or *Customer Relationship Management 8.9*:

Warning! Before exporting the 8.4x content provider portal project from the Content Provider database, you *must* run the Clean Portal Project process against the Content Provider database.

1. In your content provider database navigate to Enterprise Components, Portal Utilities, Clean Portal Project.
2. Add a run control ID of *CLEAN_PORTAL_XXXXXXX*, where *XXXXXXX* represents the portal definition name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
3. Enter the Project Name you created above; *PORTAL_EP84X_EMPL*, for example.
4. Enter a Portal Name; *EMPLOYEE*, for example.
5. Enter a Content Provider Name; *ERP*, for example.
6. Select Full Navigation.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Note. Continue with *Deleting the 8.4x Content Provider Database Two-Tier Cache* task.

Task C-2-4: Cleaning the 8.4x Content Provider Portal Project in All Other Application Databases on PeopleTools 8.45 or Less

To clean the 8.4x content provider portal project in all other application databases on PeopleTools 8.45 or less:

Note. “All other application databases” refers to application databases other than *Financials/Supply Chain 8.8*, *Staffing 8.8*, or *Customer Relationship Management 8.9*.

Warning! Before exporting the 8.4x content provider portal project from the Content Provider database, you *must* run the applicable PORTAL_XX84X_XXXX_CLEAN.DMS script against the Content Provider database.

1. The following table lists Data Mover scripts that will clean the corresponding 8.4x content provider portal project definition. Copy the applicable script to the <PS_HOME>\scripts directory of the 8.4x Content Provider database. The PARTNER portal registry is available in PeopleTools 8.45 or higher.

Content Provider on PeopleTools 8.4x	Portal Name	Script Name
CIS	EMPLOYEE	PORTAL_CI84X_EMPL_CLEAN.DMS
CRM	EMPLOYEE	PORTAL_CR84X_EMPL_CLEAN.DMS
CRM	CUSTOMER	PORTAL_CR84X_CUST_CLEAN.DMS
CRM	PARTNER	PORTAL_CR84X_PART_CLEAN.DMS
ELM	EMPLOYEE	PORTAL_LM84X_EMPL_CLEAN.DMS
EPM	EMPLOYEE	PORTAL_PF84X_EMPL_CLEAN.DMS
FSCM	EMPLOYEE	PORTAL_EP84X_EMPL_CLEAN.DMS
FSCM	CUSTOMER	PORTAL_EP84X_CUST_CLEAN.DMS
FSCM	SUPPLIER	PORTAL_EP84X_SUPP_CLEAN.DMS
HRMS	EMPLOYEE	PORTAL_HC84X_EMPL_CLEAN.DMS
SFO	EMPLOYEE	PORTAL_FO84X_EMPL_CLEAN.DMS
SFO	CUSTOMER	PORTAL_FO84X_CUST_CLEAN.DMS

2. Use Data Mover to sign on to the 8.4x Content Provider database.

3. From the <PS_HOME>\scripts\ directory, open the Data Mover script that corresponds to the created 8.4x content provider portal project name as listed above.
4. Run this script against the 8.4x Content Provider database.
5. Close Data Mover.

Note. Continue with *Deleting the 8.4x Content Provider Database Two-Tier Cache* task.

Task C-2-5: Deleting the 8.4x Content Provider Database Two-Tier Cache

To delete the 8.4x Content Provider database two-tier cache:

1. Start the 8.4x Content Provider database Configuration Manager.
2. On the Startup tab, click the Purge Cache Directories button.
3. Select the 8.4x Content Provider database name.
4. Click Delete. Click OK. Click Close.
5. Close Configuration Manager (click OK).

Task C-3: Copying the 8.4x Content Provider Portal Project

This section discusses:

- Copying the 8.4x Content Provider Portal Project to File
- Copying the 8.4x Content Provider Portal Project from File
- Deleting the Enterprise Portal Database Cache

Note. If you have copied a previous release content provider portal registry project into your Enterprise Portal (PA) database, you must remove that registry data. See the "Removing Content Provider Portal Data" appendix in this installation guide for instructions on how to remove the prior release content provider portal registry data.

Warning! Before exporting the 8.4x content provider portal project from the Content Provider database, you *must* run the PORTAL_XX84X_XXXX_CLEAN.DMS script against the Content Provider database. If you have not done this in Task C-2 above, you will overwrite necessary Enterprise Portal-specific data in the Enterprise Portal (PA) database when the project is copied into the Enterprise Portal (PA) database.

Task C-3-1: Copying the 8.4x Content Provider Portal Project to File

To copy the 8.4x content provider portal project to file:

1. Sign on to your 8.4x Content Provider database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. Select a Definition value of *Project*. Click Open. Highlight the newly created 8.4x content provider portal project name. Click Open.
4. Select Tools, Copy Project, To File.
5. Click the Browse button for the Export Directory. Navigate to a temporary directory. Click OK.
6. Click Select All.

7. Click Copy. (This may take a few minutes.)
8. Close PeopleSoft Application Designer.

Task C-3-2: Copying the 8.4x Content Provider Portal Project from File

To copy the 8.4x content provider portal project from file:

1. Sign on to your Enterprise Portal (PA) database in two-tier mode using PeopleSoft Application Designer.
2. Select Tools, Copy Project, From File.
3. Browse to the 8.4x Content Provider database server's temporary directory. This should be the temporary directory to which you copied the 8.4x Content Provider portal project to file in the previous subtask.

Note. If you cannot access the 8.4x Content Provider database server's temporary directory, then copy the portal project folder and files from the temporary directory to the Enterprise Portal (PA) database server's <PS_HOME>\Projects directory.

If your 8.4x Content Provider and Enterprise Portal databases are on the same PeopleTools release and database platform, you can copy the project directly to the Enterprise Portal database from within the 8.4x Content Provider's PeopleSoft Application Designer. You **MUST** run the clean script and delete the 8.4x Content Provider's database server cache **BEFORE** using the Tools, Copy Project, To Database utility in PeopleSoft Application Designer.

4. Select the 8.4x content provider portal project name you just copied to file.
5. Click Open.
6. Click Select All.
7. Click Options.
 - a. On the Copy Options tab, select *English* and *COMMON*. If your Enterprise Portal (PA) database is a multilingual database, then also be sure to select the language(s) you have installed on your Enterprise Portal (PA) database.
 - b. Click OK.
8. Click Copy.
9. Review the Output window on the Upgrade tab. All objects should have copied successfully.
10. Close PeopleSoft Application Designer.

Note. You do *not* need to create or alter any records or views.

Task C-3-3: Deleting the Enterprise Portal Database Cache

To delete the Enterprise Portal database cache:

Note. To be able to view the changes to your Enterprise Portal Registry you need to bounce the application server and clear its cache. In addition, you will need to bounce the web server.

1. Delete the Enterprise Portal (PA) database's application server cache.
2. Stop and start the Enterprise Portal (PA) database's web server service.

Task C-4: Updating Enterprise Portal Registry Folder Permissions

This section discusses:

- Updating the Portal Registry Permission Lists
- Deleting the Enterprise Portal Database Cache

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, the folder permissions must be updated to reflect the changes. After the folder permissions are updated, you must delete the Enterprise Portal database's cache files to reflect the changes.

Task C-4-1: Updating the Portal Registry Permission Lists

To update the portal registry permission lists:

Note. This process may take anywhere from a few minutes to a few hours, depending upon the volume of the portal data. The user ID that invokes this process must have the Portal Administrator security role or the process may terminate in an abend.

1. In your Enterprise Portal database, navigate to PeopleTools, Portal, Portal Security Sync.
2. Add a run control ID of *SECURITY_SYNC_XXXXXXXX*, where *XXXXXXXX* represents the portal registry name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
3. Enter the portal name matching the *XXXXXXXX* of the run control's portal registry name; EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER; for example. The PARTNER portal registry is available in PeopleTools 8.45 or higher.
4. Click Save.
5. Click Run.
6. Set up the Process Scheduler information and click OK.
7. Select the Process Monitor link to view the progress of the process.

Task C-4-2: Deleting the Enterprise Portal Database Cache

To delete the Enterprise Portal database cache:

Note. To be able to view the changes to your Enterprise Portal Registry you need to bounce the application server and clear its cache. In addition, you will need to bounce the web server.

1. Delete the Enterprise Portal (PA) database's application server cache.
2. Stop and start the Enterprise Portal (PA) database's web server service.

Task C-5: Updating the Portal Default Homepage Tab

The copied 8.4x content provider portal registry data includes registry entries for pagelets. To access the added pagelets from the homepage, the homepage tab definition must make these pagelets available.

To update the default homepage tab:

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Structure and Content.
3. Navigate within the Structure and Content page to Portal Objects, Homepage, Tabs.
4. Click the Edit link for the My Page tab content reference.
5. On the Tab Content tab, select the Include All option for all pagelet categories, except for the PeopleSoft Applications pagelet category.
6. In the PeopleSoft Applications pagelet category group box, define the following settings:
 - a. Clear the Menu pagelet option.
 - b. Select the Enterprise Menu pagelet option and set the value to *Req-Fix*.
 - c. Select all remaining pagelets options and set their values to *Optional*.
7. Click Save.

APPENDIX D

Maintaining Roles and User IDs Across Databases

This appendix discusses:

- Understanding Maintaining Roles and User IDs Across Databases
- Maintaining User IDs
- Maintaining Roles

Understanding Maintaining Roles and User IDs Across Databases

Single sign-on requires that the same user IDs exist within both the Enterprise Portal (PA) and the Content Provider databases. This entails keeping the user IDs synchronized between these databases. The roles should also be kept synchronized to enable consistent availability of transactions in the Enterprise Portal (PA) database and in the Content Provider database.

Maintaining roles and user IDs across Enterprise Portal (PA) and Content Provider databases is an implementation task and not an installation task. It is discussed here only as a reference.

Note. Permission list security changes made to your pre-8.4x Content Provider database must be manually repeated in the PeopleSoft 8.4x Enterprise Portal database. Role and user ID changes are maintained by way of messaging synchronization processes.

Note. Permission list changes made to your 8.4x Content Provider database are done in the 8.4x Content Provider database and then copied to the 8.4x Enterprise Portal database by way of project copy. Role and user ID changes are maintained by way of messaging synchronization processes.

Task D-1: Maintaining User IDs

PeopleTools provides two methods of having common user IDs across multiple PeopleSoft application databases. The initial loading of users should be done with the provided Data Mover (DMS) scripts. The ongoing changes are maintained by way of messaging.

The following DMS scripts are designed to export and import your security information for user profiles. The scripts can be found in your <PS_HOME>\Scripts directory.

- USEREXPORT.DMS
Exports user profiles from the source database and stores them in a Data Mover DAT file.
- USERIMPORT.DMS

Reads the file created by USEREXPORT.DMS and copies the user profile data into the target database. Existing user profile entries in the source database will be replaced.

- EXPROLES.DMS

Exports roles from the source database and stores them in a Data Mover DAT file.

- EXPROLE.DMS

Exports a single role from the source database and stores it in a Data Mover DAT file.

- IMPROLES.DMS

Reads the file created by EXPROLE.DMS and copies the role data into the target database. Existing role entries in the source database will not be overwritten or merged.

Note. More detailed information on the usage of these DMS scripts can be found in the *PeopleTools PeopleBook: PeopleTools Security*.

PeopleTools synchronizes user profiles between different databases using messaging. Whenever a user profile is created, modified, or deleted, the USER_PROFILE message is published.

You may want to choose one database in a user's environment that serves as the *profile master*. This system will be used when changing a profile, and PeopleTools will publish the appropriate messages to other subscribing databases.

Inactivating the USER_PROFILE message or the Process User Profile subscription process will disable synchronization between databases.

Note. More detailed information on changing message properties can be found in the *PeopleTools PeopleBook: PeopleSoft Integration Broker, "Defining Message Channels and Messages."*

Task D-2: Maintaining Roles

Role definitions can be copied using PeopleSoft Application Designer. This process copies all role definitions from one database to another and does not merge roles from both databases.

Role assignments, or role-to-user relationships, are synchronized across multiple databases using messaging. The ROLE_MAINT message handles static role synchronization, and the ROLESYNCH_MSG message synchronizes changes to dynamic roles. This synchronization happens when an administrator manually edits the role members using the page interface (static roles), or when the list of dynamic members changes when a role rule is executed (dynamic roles).

Note. More detailed information on roles can be found in the *PeopleTools PeopleBook: Security, "Working with Roles."*

APPENDIX E

Installing CRM 8.4x Navigation

This appendix discusses:

- Copying the CRM_NAVFILTER Project
- Updating the Portal Registry Security
- Updating the Portal Registry Navigation Filter
- Removing the Enterprise Portal Cache

Warning! Complete the tasks in this chapter after you have successfully copied the CRM 8.9 or 8.4 portal project into the Enterprise portal (PA) database's default EMPLOYEE portal definition. Do not perform the tasks in this appendix if you are using the single link access method to the CRM 8.4x database.

Do not perform the tasks in this appendix if the Enterprise portal (PA) database's default portal definition is not EMPLOYEE.

For more information, see the "Accessing PeopleSoft Content Providers" chapter and the "Installing 8.4x Content Provider Portal Pack and Navigation Projects" appendix in this installation guide.

Task E-1: Copying the CRM_NAVFILTER Project

This section discusses:

- Copying the Project to File
- Copying the Project from File

Task E-1-1: Copying the Project to File

To copy the project to file:

1. Sign on to your 8.4 CRM database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. Select a Definition value of *Project*. Click Open. Highlight the project *CRM_NAVFILTER*. Click Open.
4. Select Tools, Copy Project, To File.
5. Click the Browse button for the Export Directory. Navigate to a temporary directory. Click OK.
6. Click Select All.
7. Click Copy.
8. Close PeopleSoft Application Designer.

Task E-1-2: Copying the Project from File

To copy the project from file:

1. Sign on to your Enterprise Portal (PA) database in two-tier mode using PeopleSoft Application Designer.
2. Select Tools, Copy Project, From File.
3. Browse to the 8.4 Content Provider database server's temporary directory.

Note. If you cannot access the 8.4 CRM database server's temporary directory, then copy the portal project folder *and* files from the temporary directory to the Enterprise Portal (PA) database server's <PS_HOME>\Projects directory.

4. Select the CRM_NAVFILTER project name you just copied to file.
5. Click Open.
6. Click Select All.
7. Click Options.
 - a. On the Copy Options tab, select *English* and *COMMON*. If your Enterprise Portal (PA) database is a multilingual database, then also select the language(s) you have installed on your Enterprise Portal (PA) database.
 - b. Click OK.
8. Click Copy.
9. View the Output window on the Upgrade tab. All objects should have copied successfully. Some warning messages such as "changed Action from CopyProp to Copy, defn doesn't exist on target" or "not copied, entire definition already copied" are expected and can be ignored.
10. Change the tablespace name for record RBF_NAV_SRTY.
 - a. Open PeopleSoft Application Designer.
 - b. Select File, Open.
 - c. Select a Definition value of *Record*, and enter the string *RBF_NAV_SRTY* in the Name field. Click Open.
 - d. Select Tools, Data Administration, Set Tablespace.
 - e. In the Available Space Name-DB Name field, select the item that begins with *EOLARGE* and click OK.
 - f. Select File, Save to save your changes.
11. Select Build, Project.
12. Select Build Options as Create tables.
13. Select Build Execute Options as Execute SQL now.
14. View the Build Output window to ensure that one record was processed with no errors.
15. Close PeopleSoft Application Designer.

Task E-2: Updating the Portal Registry Security

To update portal registry security:

1. Copy the PORTAL_CR840_NAVSRTY.DMS file from the CRM 8.4 database <PS_HOME>\scripts directory to the Enterprise Portal database <PS_HOME>\scripts directory.
2. Copy the PORTAL_CR840_NAVSRTY.DAT file from the CRM 8.4 database <PS_HOME>\data directory to the Enterprise Portal database <PS_HOME>\data directory.
3. Use Data Mover to sign on to the Enterprise Portal (PA) database in bootstrap mode.
4. Open the <PS_HOME>\scripts\ PORTAL_CR840_NAVSRTY.dms script.
5. Follow the directions outlined in the Data Mover script text very carefully.
6. If running DB2/OS390, add the following statement after set input and set log and before import *:


```
SET EXECUTE_SQL SET CURRENT SQLID = 'OBJ#OWNER';
```
7. Run this script against the Enterprise Portal (PA) database by selecting File, Run Script.
8. View the Output window to ensure that rows have been inserted.
 - For customers using CRM 8.8 or 8.9, 24 rows will have been inserted.
 - For customers using CRM 8.4, nine rows will have been inserted.
9. Close Data Mover.

Task E-3: Updating the Portal Registry Navigation Filter

To update the portal registry navigation filter:

1. Copy the PORTAL_CR840_NAVFILTER.DMS file from the CRM 8.4 database <PS_HOME>\scripts directory to the Enterprise Portal database <PS_HOME>\scripts directory.
2. Use Data Mover to sign on to the Enterprise Portal (PA) database.
3. Open the <PS_HOME>\scripts\ PORTAL_CR840_NAVFILTER.DMS script.
4. Follow the directions outlined in the Data Mover script text very carefully.
5. Run this script against the Enterprise Portal (PA) database by selecting File, Run Script.
6. Close Data Mover.

Task E-4: Removing the Enterprise Portal Cache

To delete the Enterprise Portal database cache:

1. Delete the Enterprise Portal (PA) database's application server cache.
2. Stop and start the Enterprise Portal (PA) database's web server service.

APPENDIX F

Installing 8.1x Content Provider Portal Navigation Projects

This appendix discusses:

- Retrieving 8.1x Content Provider Navigation Project Files
- Copying the 8.1x Content Provider Navigation Project
- Updating Enterprise Portal Registry Folder Permissions

Note. PeopleSoft application databases that contain the transaction content are referred to as the *Content Provider* databases.

8.1x content provider refers to PeopleSoft application database on PeopleTools release 8.1x.

Warning! The tasks in this appendix are optional and should be performed during the implementation phase. They should only be performed if you own an 8.1x Content Provider database and you want to view the 8.1x content provider's navigation hierarchy within the PeopleSoft Enterprise Portal navigation.

Task F-1: Retrieving 8.1x Content Provider Navigation Project Files

The download locations of the 8.1x content provider Navigation Project Files are available from PeopleSoft Customer Connection in the Updates + Fixes section under the report ID 100108. Follow the instructions in the posted update. For a multilingual Enterprise Portal (PA) database, be sure to download the multilingual Updates + Fixes version.

The files and folders retrieved from PeopleSoft Customer Connection must be copied into the respective <PS_HOME>\projects and <PS_HOME>\scripts file directories of your Enterprise Portal (PA) application database. These are the same directories in which you installed the Enterprise Portal 8.9 CD.

Note. As an alternative to using the 8.1x projects in an 8.4x format as delivered by PeopleSoft, you can create these projects in the 8.4x format yourself. The process entails loading the delivered 8.1x registry structures in an 8.1x format into a copy of your production 8.1x Content Provider database and upgrading this database to 8.4x PeopleTools, and then extracting the upgraded registry data into the Enterprise Portal database. The advantage of this approach is that the permission list security on upgraded registry structures will be synchronized with what exists in your 8.1x application production database. For more information on this process, see the "Creating 8.1x Content Provider Projects in an 8.4 Format" appendix in this installation guide.

Task F-2: Copying the 8.1x Content Provider Navigation Project

The 8.1x content provider Navigation project will copy pagelets and pagelet extension pages into the Enterprise Portal database's default portal registry. After copying the Navigation project, you must delete the Enterprise Portal database's cache to reflect the changes.

Note. If you have copied a previous release content provider portal registry project into your Enterprise Portal (PA) database, you must remove that registry data. See the "Removing Content Provider Portal Data" appendix in this installation guide for instructions on how to remove the prior release content provider portal registry data.

To copy the 8.1x Navigation project:

1. Sign on to your Enterprise Portal (PA) database in two-tier mode using PeopleSoft Application Designer.

Note. Repeat the following steps for each applicable project listed in the 8.1x Navigation project table below. Applicable projects are those listed in a section or row of a purchased 8.1x Content Provider database that are designated for use with your Enterprise Portal database's default portal registry. Only copy the project whose name corresponds with your Enterprise Portal database default portal registry.

2. Select Tools, Copy Project, From File.
3. Browse to <PS_HOME>\Projects. Click OK.
4. Select the applicable 8.1x Navigation project name listed below for the Enterprise Portal database default portal registry (CUST = CUSTOMER, EMPL = EMPLOYEE, SUPP = SUPPLIER.)

Note. The Portal Pack and Navigation projects listed below that are marked with an asterisk are combined into a NAV project for the Customer and Supplier portal registries. They are listed in the "Installing 8.1x Content Provider Portal Pack Projects" appendix in this installation guide. There is no need to copy the projects more than once.

Content Provider	8.1x Navigation Project	EMPL	CUST	SUPP
BP 8	PORTAL_NAV_BP802_EMPL84	X		
CRM 8.0	PORTAL_NAV_CR800_EMPL84	X		
CRM 8.0	PORTAL_NAV_CR800_CUST84 *		X	
CRM 8.1	PORTAL_NAV_CR810_EMPL84	X		
CRM 8.1	PORTAL_NAV_CR810_CUST84 *		X	
EPM 8 SP2	PORTAL_NAV_PF802_EMPL84	X		
EPM 8.3	PORTAL_NAV_PF830_EMPL84	X		
FSCM 8 SP2, SP3	PORTAL_NAV_EP802_EMPL84	X		
FSCM 8 SP2, SP3	PORTAL_NAV_EP802_CUST84 *		X	
FSCM 8 SP2, SP3	PORTAL_NAV_EP802_SUPP84 *			X

Content Provider	8.1x Navigation Project	EMPL	CUST	SUPP
HRMS 8 SP1	PORTAL_NAV_HC801_EMPL84	X		
HRMS 8.3, 8.3 SP1	PORTAL_NAV_HC830_EMPL84	X		
HRMS 8.3 (SFO Bolt-On)	PORTAL_NAV_HC830_FO_EMPL84	X		
LS 8.0	PORTAL_NAV_SA800_EMPL84	X		

5. Click Open.
6. Click Select All.
7. Click Options.
 - a. On the Copy Options tab, select *English* and *COMMON*. If your Enterprise Portal (PA) database is a multilingual database, then also select the language(s) you have installed on your Enterprise Portal (PA) database.
 - b. Click OK.
8. Click the Copy button.
9. View the Output window on the Upgrade tab. All objects should have copied successfully.
10. Stop the Enterprise Portal (PA) database's application server.
11. Stop the Enterprise Portal (PA) database's web server.
12. Start the Enterprise Portal (PA) database's web server.
13. Start the Enterprise Portal (PA) database's application server.

Note. You do *not* need to create or alter any records or views.

Task F-3: Updating Enterprise Portal Registry Folder Permissions

This section discusses:

- Updating the Portal Registry Permission Lists
- Deleting the Enterprise Portal Database Cache

Portal data from different Content Provider databases may share a common portal folder. After copying the 8.1x Navigation projects, the folder permissions must be updated to reflect the changes. After the folder permissions are updated, you must delete the Enterprise Portal database's cache to reflect the changes.

Task F-3-1: Updating the Portal Registry Permission Lists

To update the portal registry permission lists:

Note. This process may take anywhere from a few minutes and a few hours, depending upon the volume of the portal data. The user ID that invokes this process must have the Portal Administrator security role or the process may terminate in an abend.

1. In your Enterprise Portal database, navigate to PeopleTools, Portal, Portal Security Sync.
2. Add a run control ID of *SECURITY_SYNC_XXXXXXXX*, where *XXXXXXXX* represents the portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
3. Enter the portal name matching the *XXXXXXXX* of the run control's portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
4. Click Save.
5. Click Run.
6. Set up the Process Scheduler information and click OK.
7. Select the Process Monitor link to view the progress of the process.

Task F-3-2: Deleting the Enterprise Portal Database Cache

To delete the Enterprise Portal database cache:

Note. To be able to view the changes to your Enterprise Portal Registry you need to bounce the application server and clear its cache. In addition, you will need to bounce the web server.

1. Delete the Enterprise Portal (PA) database's application server cache.
2. Stop and start the Enterprise Portal (PA) database's web server service.

APPENDIX G

Creating 8.1x Content Provider Projects in an 8.4 Format

This appendix discusses:

- Understanding Creating 8.1x Content Provider Projects in an 8.4 Format
- Creating a Copy of Your 8.1x Content Provider Production Database
- Making Files Accessible to the Copy of Production Database
- Removing Any Non-Portal PeopleTools Registry Structures
- Importing the Content Provider Names and Local Node
- Retrieving 8.1x Content Provider Portal Projects in 8.1x Format
- Loading Portal Registry Projects in 8.1x Format
- Upgrading the Copy of Production Database to PeopleTools 8.4x
- Copying Registry Data to the Applicable Portal Registry
- Copying Missed Portal Registry Data to the Applicable Portal Registry
- Updating Copy of Production Portal Registry Permission Lists
- Creating the Copy of Production Portal Registry Project
- Copying the Copy of Production Portal Registry Project
- Updating Enterprise Portal Registry Folder Permissions
- Updating the Enterprise Portal Default Homepage Tab
- Discarding the Content Provider Copy of Production Database

Note. PeopleSoft application databases that contain transaction content are referred to as the *Content Provider* databases.

8.1x content provider refers to PeopleSoft application database on PeopleTools release 81x.

Understanding Creating 8.1x Content Provider Projects in an 8.4 Format

This chapter provides an alternative method of accessing the 8.1x portal registry data in an 8.4x format for loading into the PeopleSoft Enterprise Portal 8.9. Instead of taking the PeopleSoft delivered 8.1x project files in the 8.4x format, you can create these projects in the correct format from the PeopleSoft-delivered 8.1x project files in the 8.1x format.

The process entails loading the delivered 8.1x registry structures in an 8.1x format into a copy of your production 8.1x Content Provider database and upgrading this database to 8.4x PeopleTools, then extracting the upgraded registry data into the Enterprise Portal database.

The advantage of this approach is that the permission list security on upgraded registry structures will be synchronized with what exists in your production database. Any subsequent changes to permission lists will have to be manually updated in the PeopleSoft Enterprise Portal.

Note. When signing on to an 8.4x PeopleTools database from the browser, the URL text uses the format `http://localhost/pshome/signon.html`, where `localhost` is the hostname of the web server machine where the Copy of Production database web server files are installed and `pshome` is the site name of the Copy of Production database web server files. The default `pshome` value is *ps*.

Task G-1: Creating a Copy of Your 8.1x Content Provider Production Database

You will be utilizing the existing security setup in your 8.1x Content Provider production database to synchronize the portal registry security data.

Create a copy of your 8.1x Content Provider production database. Subsequent tasks refer to this database as the Copy of Production database.

Task G-2: Making Files Accessible to the Copy of Production Database

Subsequent tasks in this document require Data Mover files that were shipped with your PeopleSoft Enterprise Portal 8.9. The following table lists the required files. Copy the *.DMS files to the `<PS_HOME>\scripts` directory of the Copy of Production database. Copy the *.DAT files to the `<PS_HOME>\data` directory of the Copy of Production database.

Script Name	Delivered Enterprise Portal Location
PORTAL_81X_REG_DEL.DMS	<PS_HOME>\scripts
PORTAL_81X_CPRV_NAME.DMS	<PS_HOME>\scripts
PORTAL_81X_CPRV_NAME.DAT	<PS_HOME>\data
PORTAL_81X_NNN_840_EMPL_CLEAN.DMS	<PS_HOME>\scripts
PORTAL_81X_NNN_840_CUST_CLEAN.DMS	<PS_HOME>\scripts
PORTAL_81X_NNN_840_SUPP_CLEAN.DMS	<PS_HOME>\scripts

Task G-3: Removing Any Non-Portal PeopleTools Registry Structures

Before loading any 8.1x portal registry data into the Copy of Production database, you must remove all existing portal registry structures that are not portal-PeopleTools specific. This will prevent possible registry structure conflicts, as well as minimize the effort to create 8.1x content provider registry data in an 8.4 format.

To remove any non-portal PeopleTools registry structures:

1. Use Data Mover to sign on to the Copy of Production database.
2. Open the <PS_HOME>\scripts\PORTAL_81X_REG_DEL.DMS script.
3. Follow the directions as outlined in the Data Mover script text very carefully.

Warning! This script will delete any non-portal PeopleTools portal registry data from the portal registry. Do *not* run this script at a later point in this process.

4. Run this script against the Copy of Production database.
5. Close Data Mover.

Task G-4: Importing the Content Provider Names and Local Node

Before loading any 8.1x portal registry data into the Copy of Production database, you must import the 8.1x content provider node names. The portal registry data directly references content provider node names.

To load the content provider node names:

1. Use Data Mover to sign on to the Copy of Production database.
2. Open the <PS_HOME>\scripts\PORTAL_81X_CPRV_NAME.DMS script.
3. Follow the directions as outlined in the Data Mover script text very carefully.
4. Run this script against the Copy of Production database.
5. Close Data Mover.

Task G-5: Retrieving 8.1x Content Provider Portal Projects in 8.1x Format

The delivered 8.1x content provider portal project files in 8.1x format are available from PeopleSoft Customer Connection.

To retrieve the 8.1x content provider portal projects in 8.1x format:

1. Access report ID 100109 in the Updates + Fixes section of PeopleSoft Customer Connection. This update provides information about where to find the current 8.1x content provider portal projects in a PeopleTools 8.1x format.
2. Select only the project files that you need for your 8.1x Content Provider database. You will need the project files that meet the following criteria:
 - Select project files that are specific to your 8.1x Content Provider production database's current release.
 - Select project files where the project name contains the portal registry name corresponding to the Enterprise Portal database's default portal registry name (EMPL, CUST, or SUPP).
 - You do *not* need to select any project files where the project name contains the text *PERM*. You will be using the existing Copy of Production database's permission lists.
 - For a multilingual Enterprise Portal database, select the multilingual Updates + Fixes version.
3. Follow the instructions in the posted update to extract the necessary project files.

Note. In subsequent tasks, the selected projects are referred to as the Portal Registry Projects.

4. Copy the extracted project folders and files to the Copy of Production database's <PS_HOME>\Projects directory.

Task G-6: Loading Portal Registry Projects in 8.1x Format

To copy the portal registry project(s):

Note. Repeat this task for each of the retrieved Portal Registry Projects. Do *not* perform this task for any project with the text *PERM* in the project name.

Warning! You must copy the applicable Portal Registry Projects in alphabetical order to ensure a correct loading sequence. This entails copying the self-service (SS) projects before the expert-user (XP) projects.

To copy the portal registry project(s):

1. Sign on to your Portal Host database in two-tier mode using PeopleSoft Application Designer.
2. Navigate to File, Copy Project from File. Browse to <PS_HOME>\Projects. Click OK.
3. Select the applicable project name. Click Copy.
4. Ensure that the Reset Done flags option is selected.
5. Select *only* the object type Portal Registry Structures. Ensure that all other type options are clear.
6. Click the Options button.
 - a. On the Copy Options tab, select *English* and *COMMON*. If your Copy of Production database is a multilingual database, then also select the language(s) you have installed.
 - b. Clear the Filter by Release Stamp option.
 - c. Click OK.
7. Click the Copy button.
8. View the Output window on the Upgrade tab. All objects should have copied successfully.

Note. You do *not* need to create or alter any records or views.

Task G-7: Upgrading the Copy of Production Database to PeopleTools 8.4x

This section discusses:

- Editing the Message Nodes Script for the PeopleTools 8.4 Upgrade
- Upgrading the Copy of Production Database to PeopleTools 8.4

This document assumes that you are using an installed PeopleSoft Enterprise Portal 8.9 database as the source database for the PeopleTools-only upgrade. See PeopleTools 8.4x Upgrade documentation for the necessary steps.

Instead of using the PeopleSoft Enterprise Portal 8.9 database as the source database, you could optionally install an 8.4x PTSYS database to use as the source database.

Task G-7-1: Editing the Message Nodes Script for the PeopleTools 8.4 Upgrade

To edit the message nodes script for the PeopleTools 8.4 upgrade:

1. Open the PeopleTools 8.4x PORTALNODES.DMS upgrade script.

Note. The PORTALNODES.DMS script is run BEFORE the PeopleTools upgrade UPG84PORTAL process. You can adjust this script before you begin the PeopleTools 8.4x upgrade.

2. Make the following adjustments to the PORTALNODES.DMS:
 - a. Replace ALL instances of PSFT_PE with TEMP_LOCAL. The local node was set to TEMP_LOCAL in task 4 of this document when you ran the PORTAL_81X_CPRV_NAME.DMS script.
 - b. Replace ALL instances of localhost with the hostname of the database web server. Include the port number and network domain name as needed.
 Example: http://myserver/psc/pshome/.
 Example: http://myserver:8080/psc/pshome/.
 Example: http://myserver.mydomain.com:8080/psc/pshome/.
 - c. Replace ALL instances of pshome with the directory in which you installed the PeopleSoft web server files. Example: http://myserver/psc/PA840DMO/.
 - d. Since your application production database will remain on PeopleTools 8.1x, keep the 8.1x application content provider message node type as ICT.
 The 8.x content provider message nodes are BP, CRM, EPM, ERP, HRMS, and SA. If the node type is not kept as ICT, the portal content references using that node will NOT be able to access the 8.1x application database.
 - e. Replace ALL instances of EMPLOYEE with the PS_SITETEMPLATE. Your default sign-on will access this portal registry.
3. Save the PORTALNODES.DMS script with your changes.

Task G-7-2: Upgrading the Copy of Production Database to PeopleTools 8.4

To upgrade the Copy of Production database to PeopleTools 8.4:

1. Follow the PeopleTools upgrade instructions to upgrade the copy of your 8.1x Copy of Production database to PeopleTools 8.4x.
2. Ensure that the upgrade user ID contains the PeopleSoft Administrator PeopleTools security role and the Portal Administrator role before running the UPG84PORTAL process.
3. Run the PORTALNODES.DMS script you adjusted in the previous subtask.

Task G-8: Copying Registry Data to the Applicable Portal Registry

This section discusses:

- Determining the Enterprise Portal Database's Default Portal
- Copying the Level 1 Folder Data to the Applicable Portal Registry
- Copying the Level 1 Content Reference Data to the Applicable Portal Registry
- Copying Pagelets to the Applicable Portal Registry

The portal registry data includes navigation data, pagelet data, and template data. The upgraded Copy of Production content provider registry data is in the PORTAL portal definition. The registry data needs to be copied to the applicable portal registry. The applicable portal registry is the default portal registry of the Enterprise Portal (PA) database; EMPLOYEE, CUSTOMER, or SUPPLIER; for example. This is the same portal registry name that corresponds to the copied Portal Registry Projects project name; EMPL, CUST, or SUPP; for example.

In this task, you will determine the portal registry (EMPLOYEE, CUSTOMER, or SUPPLIER) into which you will copy the portal registry data. You will then copy the portal registry data by copying the parent folders and electing to include the child objects.

Enterprise Portal and PeopleTools folders are not to be copied, as you only want to copy the content provider registry data. Any content provider data that may have been stored in an Enterprise Portal or PeopleTools folder will be individually copied in the next task.

Task G-8-1: Determining the Enterprise Portal Database's Default Portal

To determine the Enterprise Portal database's default portal:

1. From your browser, sign on to the Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Portal Definition.
3. The Default option is selected for the default portal name.
4. Make a note of which portal registry name (EMPLOYEE, CUSTOMER, or SUPPLIER) is the default portal registry. This value is referred to as the Applicable Portal Registry in subsequent steps.

Task G-8-2: Copying the Level 1 Folder Data to the Applicable Portal Registry

To copy the level 1 folder data to the Applicable Portal Registry:

1. From your browser, sign on to the Copy of Production database.
2. In the browser address, replace `/PS_SITETEMPLATE/` with `/PORTAL/`. Press ENTER to activate the adjusted address.
3. Navigate to Portal Administration, Structure and Content.

Note. To view all level 1 folders, you may have to select the View All link in the Folders scroll area on the Structure and Content page.

4. Perform the following steps for *almost* every level 1 folder listed in your PORTAL portal registry. Do *not* copy the following level 1 folders, as you only want to copy the content provider registry data, not the PeopleTools registry data: My Favorites, Portal Objects, PeopleTools CTI, Portal Administration, Tools - Hidden, PeopleTools, and Worklist.
 - a. Click the Edit link for the level 1 folder.
 - b. Click the Copy object button.
 - c. Select the Recurse subfolders check box.
 - d. Select the applicable portal registry name: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - e. Click the Yes - Copy button.
 - f. Click OK on the confirmation page.
 - g. Select the Root link at the top of the Copy Object To a Different Portal Registry page.
5. Repeat step 4 to copy the next applicable level 1 folder.

Task G-8-3: Copying the Level 1 Content Reference Data to the Applicable Portal Registry

To copy the level 1 content reference data to the Applicable Portal Registry:

1. From your browser, sign on to the Copy of Production database.
2. In the browser address, replace `/PS_SITETEMPLATE/` with `/PORTAL/`. Press ENTER to activate the adjusted address.
3. Navigate to Portal Administration, Structure and Content.
4. Scroll to the bottom of the Structure and Content page. Level 1 content references are listed in the Content References scroll area on this page.
5. Repeat the following for each level 1 content reference.
 - a. Select the Edit link for the level 1 content reference.
 - b. Click the Copy object button.
 - c. Select the applicable portal registry name: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - d. Click the Yes - Copy button.
 - e. Click OK on the confirmation page.

- f. Select the Root link at the top of the Copy Object To a Different Portal Registry page.
6. Repeat step 5 to copy the next applicable level 1 content reference.

Task G-8-4: Copying Pagelets to the Applicable Portal Registry

To copy pagelets to the applicable Portal Registry:

1. From your browser, sign on to the Copy of Production database.
2. In the browser address, replace `/PS_SITETEMPLATE/` with `/PORTAL/`. Press ENTER to activate the adjusted address.
3. Navigate to Portal Administration, Structure and Content.
4. In the Folder scroll area on the Structure and Content page, navigate through Portal Objects, Pagelets.
5. Complete the following steps for *almost* every pagelet category folder listed in your PORTAL portal registry under the Pagelets folder. Do *not* copy the following pagelet category folders: PeopleSoft Applications, Finance, Miscellaneous, Organizers, and News. These folders and some of their contents have been updated in the default portal registry. You do not want to overwrite the updates by copying the old registry data.
 - a. Select the Edit link for the applicable pagelet category folder.
 - b. Click the Copy object button.
 - c. Select the Recurse subfolders check box.
 - d. Click the Open Folder icon next to the applicable portal registry link: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - e. Click the Open Folder icon next to the Portal Objects link.
 - f. Select the Pagelets link.
 - g. On the Copy Confirmation page, confirm that the Source Portal Path and Target Portal Path are the same (Root > Portal Objects > Pagelets).
 - h. Click the Yes - Copy button.
 - i. Click OK on the confirmation page.
 - j. Select the Root link at the top of the Copy Object To a Different Portal Registry page.
6. Repeat step 5 to copy the next applicable pagelet category folder.

Task G-9: Copying Missed Portal Registry Data to the Applicable Portal Registry

This section discusses:

- Copying Missed Template Portal Data to the Default Portal Registry
- Copying Missed Pagelet Portal Data to the Default Portal Registry
- Copying Missed Level 1 Folder Data to the Default Portal Registry
- Copying Missed Level 1 Content References to the Default Portal Registry

By skipping the PeopleSoft Enterprise Portal and PeopleTools registry folders, some content provider registry data may have been missed. This task enables you to query the database for any missed data and individually copy the data to the applicable portal registry.

Task G-9-1: Copying Missed Template Portal Data to the Default Portal Registry

To copy missed template portal data to the default portal registry:

1. Run the following SQL select statement in your platform-specific SQL query tool:

```
SELECT B.PORTAL_LABEL AS TEMPLATE_FOLDER_NAME, A.PORTAL_LABEL AS
TEMPLATE_NAME, A.PORTAL_OBJNAME AS TEMPLATE_OBJECT
FROM PSPRSMDEFN A, PSPRSMDEFN B
WHERE A.PORTAL_NAME = 'PORTAL'
AND A.PORTAL_PRNTOBJNAME = B.PORTAL_OBJNAME
AND A.PORTAL_NAME = B.PORTAL_NAME
AND A.PORTAL_REFTYPE = 'C'
AND A.PORTAL_PRODUCT NOT IN ('PRTL', 'PT', 'ENTP', 'PAPP')
AND A.OBJECTOWNERID NOT IN ('PPT', 'CPA')
AND A.PORTAL_OBJNAME NOT IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_NAME <> 'PORTAL' AND PORTAL_REFTYPE = 'C')
AND A.PORTAL_PRNTOBJNAME = 'PORTAL_TEMPLATES'
ORDER BY 1,2,3
```

2. Save the output results to file for reference in step 3.
3. The results of the SQL query show missed template registry data that must be individually copied to the applicable portal registry: EMPLOYEE, CUSTOMER, or SUPPLIER. Follow these steps to do so:
 - a. From your browser, sign on to the Copy of Production database.
 - b. In the browser address, replace /PS_SITETEMPLATE/ with /PORTAL/. Press ENTER to activate the adjusted address.
 - c. Navigate to PeopleTools, Portal, Structure and Content.
 - d. In the Folder scroll area on the Structure and Content page, navigate through Portal Objects, Templates.
 - e. Click the Edit link for the missed template name as shown in the SQL results.
 - f. Click the Copy Object button.
 - g. Click the Open Folder icon next to the applicable portal registry link: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - h. Click the Open Folder icon next to the Portal Objects link.
 - i. Select the Templates link.
 - j. On the Copy Confirmation page, confirm that the Source Portal Path and Target Portal Path are the same (Root > Portal Objects > Templates.)
 - k. Click the Yes - Copy button.
 - l. Click OK on the confirmation page.
 - m. Select the Root link at the top of the Copy Object To a Different Portal Registry page.

4. Repeat step 3 to copy the next applicable template content reference.

Task G-9-2: Copying Missed Pagelet Portal Data to the Default Portal Registry

To copy the missed pagelet portal data to the default portal registry:

1. Run the following SQL select statement in your platform-specific SQL query tool.

```
SELECT B.PORTAL_LABEL AS PAGELET_CATEGORY_FOLDER, A.PORTAL_LABEL AS
PAGELET_NAME, A.PORTAL_OBJNAME AS PAGELET_OBJECT
FROM PSPRSMDEFN A, PSPRSMDEFN B
WHERE A.PORTAL_NAME = 'PORTAL'
AND A.PORTAL_PRNTOBJNAME = B.PORTAL_OBJNAME
AND A.PORTAL_NAME = B.PORTAL_NAME
AND A.PORTAL_REFTYPE = 'C'
AND A.PORTAL_PRODUCT NOT IN ('PRTL', 'PT', 'ENTP', 'PAPP')
AND A.OBJECTOWNERID NOT IN ('PPT', 'CPA')
AND A.PORTAL_OBJNAME NOT IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_NAME <> 'PORTAL' AND PORTAL_REFTYPE = 'C')
AND A.PORTAL_PRNTOBJNAME IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_PRNTOBJNAME = 'PORTAL_PAGELETS')
ORDER BY 1,2,3
```

2. Save the output results to file for reference in step 3.
3. The results of the SQL query show missed pagelet content references that must be individually copied to the applicable portal registry; EMPLOYEE, CUSTOMER, or SUPPLIER. Follow these steps to do so:
 - a. From your browser, sign on to the Copy of Production database.
 - b. In the browser address, replace */PS_SITETEMPLATE/* with */PORTAL/*. Press **ENTER** to activate the adjusted address.
 - c. Navigate to PeopleTools, Portal, Structure and Content.
 - d. In the Folder scroll area on the Structure and Content page, navigate through Portal Objects, Pagelets.
 - e. Using the SQL results, click on the pagelet category folder link for the missed pagelet.
 - f. Using the SQL results, select the Edit link for the missed pagelet name.
 - g. Click the Copy Object button.
 - h. Click the Open Folder icon next to the applicable portal registry link: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - i. Click the Open Folder icon next to the Portal Objects link.
 - j. Click the Open Folder icon next to the Pagelets link.
 - k. Using the SQL results, select the pagelet category folder. (If the exact pagelet category folder name does not exist in the default portal registry, select an appropriate pagelet category folder link.)
 - l. On the Copy Confirmation page, confirm that the Source Portal Path and Target Portal Path match (Root > Portal Objects > Pagelets > pagelet category folder), or that the target pagelet category folder is appropriate for the given pagelet name.
 - m. Click the Yes - Copy button.

- n. Click OK on the confirmation page.
- o. Select the Root link at the top of the Copy Object To a Different Portal Registry page.
4. Repeat step 3 to copy the next applicable pagelet content reference.

Task G-9-3: Copying Missed Level 1 Folder Data to the Default Portal Registry

To copy the missed level 1 folder data to the default portal registry:

1. Run the following SQL select statement in your platform-specific SQL query tool.

```
SELECT C.PORTAL_LABEL AS GRANDPARENT_FOLDER_NAME, B.PORTAL_LABEL AS
PARENT_FOLDER_NAME, A.PORTAL_LABEL AS CONTENT_REFERENCE_NAME,
A.PORTAL_OBJNAME AS CONTENT_REFERENCE_OBJECT
FROM PSPRSMDEFN A, PSPRSMDEFN B , PSPRSMDEFN C
WHERE A.PORTAL_NAME = 'PORTAL'
AND A.PORTAL_PRNTOBJNAME = B.PORTAL_OBJNAME
AND B.PORTAL_PRNTOBJNAME = C.PORTAL_OBJNAME
AND A.PORTAL_NAME = B.PORTAL_NAME
AND B.PORTAL_NAME = C.PORTAL_NAME
AND A.PORTAL_REFTYPE = 'C'
AND A.PORTAL_PRODUCT NOT IN ('PRTL', 'PT', 'ENTP', 'PAPP')
AND A.OBJECTOWNERID NOT IN ('PPT', 'CPA')
AND A.PORTAL_OBJNAME NOT IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_NAME <> 'PORTAL' AND PORTAL_REFTYPE = 'C')
AND A.PORTAL_PRNTOBJNAME <> 'PORTAL_TEMPLATES'
AND A.PORTAL_PRNTOBJNAME NOT IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_PRNTOBJNAME = 'PORTAL_PAGELETS')
AND A.PORTAL_PRNTOBJNAME NOT IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_PRNTOBJNAME IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_PRNTOBJNAME= 'PORTAL_USERS'))
ORDER BY 1,2,3
```

2. Save the output results to file for reference in step 3.
3. The results of the SQL query show missed level 1 folder content references that must be individually copied to the applicable portal registry; EMPLOYEE, CUSTOMER, or SUPPLIER. Follow these steps to do so:
 - a. From your browser, sign on to the Copy of Production database.
 - b. In the browser address, replace /PS_SITETEMPLATE/ with /PORTAL/. Press ENTER to activate the adjusted address.
 - c. Navigate to PeopleTools, Portal, Structure and Content.
 - d. The SQL results list the grandparent, parent, and content reference names. Navigate within the Structure and Content page by selecting the grandparent and parent folder links.

Note. If the missed content reference is in a level 3 folder, the level 1 folder name is not displayed in the SQL results. If the missed content reference is in a level 1 folder, the grandparent folder name displays as Root in the SQL results.

- e. Using the SQL results, select the Edit link for the missed content reference name.
 - f. Click the Copy Object button.
 - g. Click the Open Folder icon next to the applicable portal registry link: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - h. Use the Open Folder icons to navigate through the hierarchy to the corresponding or appropriate parent folder in the default portal registry. A good rule of thumb for an appropriate parent folder is that the parent folder should have the same permission lists as the copied child content reference. If you are unsure of where to place a content reference, you can place it at level 1 by selecting the applicable portal registry name.
 - i. Select the parent folder link.
 - j. On the Copy Confirmation page, confirm that the Source Portal Path and Target Portal Path match, or that the target is appropriate for the given Content Reference.
 - k. Click the Yes - Copy button.
 - l. Click OK on the confirmation page.
 - m. Select the Root link at the top of the Copy Object To a Different Portal Registry page.
4. Repeat step 3 to copy the next applicable content reference.

Task G-9-4: Copying Missed Level 1 Content References to the Default Portal Registry

To copy the missed level 1 content references to the default portal registry:

Note. Missed level 1 content references are the result of losing your place when you copied them earlier in this process.

1. Run the following SQL select statement in your platform-specific SQL query tool.

```
SELECT B.PORTAL_LABEL AS PARENT_FOLDER_NAME, A.PORTAL_LABEL AS
CONTENT_REFERENCE_NAME, A.PORTAL_OBJNAME AS CONTENT_REFERENCE_OBJECT
FROM PSPRSMDEFN A, PSPRSMDEFN B
WHERE A.PORTAL_NAME = 'PORTAL'
AND A.PORTAL_PRNTOBJNAME = B.PORTAL_OBJNAME
AND A.PORTAL_NAME = B.PORTAL_NAME
AND A.PORTAL_REFTYPE = 'C'
AND A.PORTAL_PRODUCT NOT IN ('PRTL', 'PT', 'ENTP', 'PAPP')
AND A.OBJECTOWNERID NOT IN ('PPT', 'CPA')
AND A.PORTAL_OBJNAME NOT IN (SELECT PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_NAME <> 'PORTAL' AND PORTAL_REFTYPE = 'C')
AND A.PORTAL_PRNTOBJNAME = 'PORTAL_ROOT_OBJECT'
ORDER BY 1,2,3
```

2. Save the output results to file for reference in step 3.
3. The results of the SQL query show missed level 1 content references that must be individually copied to the applicable portal registry; EMPLOYEE, CUSTOMER, or SUPPLIER. Follow these steps to do so:
 - a. From your browser, sign on to the Copy of Production database.

- b. In the browser address, replace the default portal registry definition and node name; */EMPLOYEE/EMPL/, /CUSTOMER/CUST/, or /SUPPLIER/SUPP;* with */PORTAL/TEMP_LOCAL/*. Press Enter to activate the adjusted address.
 - c. Navigate to PeopleTools, Portal, Structure and Content.
 - d. Scroll to the bottom of the Structure and Content page. Level 1 content references are listed in the Content References scroll area of the page.
 - e. Select the Edit link for the missed content reference name as shown in the SQL results.
 - f. Click the Copy object button.
 - g. Select the default portal registry link: EMPLOYEE, CUSTOMER, or SUPPLIER.
 - h. Click the Yes - Copy button.
 - i. Click OK on the confirmation page.
 - j. Select the Root link at the top of the Copy Object To a Different Portal Registry page.
4. Repeat step 3 to copy the next applicable level 1 content reference.

Task G-10: Updating Copy of Production Portal Registry Permission Lists

This section discusses:

- Setting the Content Provider Message Node as Local
- Updating the Portal Registry Permission Lists
- Deleting the Enterprise Portal Database Cache

The Portal Security Synchronization process will update the portal content references and folders with the existing permission lists as defined in the Copy of Production database.

The synchronization process only updates the portal registry permission lists for the content references that are associated with a local node. It will not update any content references that are specified as external, are associated with a remote node, or which contain an additional parameter value, such as a query string. The process will not delete any existing folder permissions, but it will append additional permission lists to the parent folders of the updated content reference.

Task G-10-1: Setting the Content Provider Message Node as Local

To set the content provider message node as local:

1. From your browser, sign on to the Copy of Production database.
2. Navigate to PeopleTools, Portal, Node Definitions.
3. Enter the message node name corresponding to your Copy of Production Content Provider database:

Content Provider Database	Node Name
Budget Planning	BP
Customer Relationship	CRM
Enterprise Performance	EPM
Financials Supply Chain	ERP
Human Resources	HRMS
Learning Solutions	SA

- Click Search.
- Select the Active Node check box.
- Select the Local Node check box.
- Click Save.

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, the folder permissions must be updated to reflect the changes. After the folder permissions are updated, you must delete the Enterprise Portal database's cache files to reflect the changes.

Task G-10-2: Updating the Portal Registry Permission Lists

To update the portal registry permission lists:

Note. This process may take anywhere from a few minutes to a few hours, depending upon the volume of the portal data. The user ID that invokes this process must have the Portal Administrator security role or the process may terminate in an abend.

- In your Enterprise Portal database, navigate to PeopleTools, Portal, Portal Security Sync.
- Add a run control ID of *SECURITY_SYNC_XXXXXXX*, where *XXXXXXX* represents the portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
- Enter the portal name matching the *XXXXXXX* of the run control's portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
- Click Save.
- Click Run.
- Set up the Process Scheduler information and click OK.
- Select the Process Monitor link to view the progress of the process.

Task G-10-3: Deleting the Enterprise Portal Database Cache

To delete the Enterprise Portal database cache:

Note. To be able to view the changes to your Enterprise Portal Registry you need to bounce the application server and clear its cache. In addition, you will need to bounce the web server.

- Delete the Enterprise Portal (PA) database's application server cache.

2. Stop and start the Enterprise Portal (PA) database's web server service.

Task G-11: Creating the Copy of Production Portal Registry Project

This section discusses:

- Creating the Copy of Production Portal Registry Project
- Cleaning the Copy of Production Portal Registry Project
- Deleting the Copy of Production Database Two-Tier Mode Cache

Task G-11-1: Creating the Copy of Production Portal Registry Project

To create the Copy of Production portal registry project:

1. Sign on to your Copy of Production database in two-tier mode using PeopleSoft Application Designer.
2. Select File, New.
3. Select a New Definition value of *Project*. Click OK.
4. Select Insert, Definitions into Project.
5. Select a Definition Type value of *Permission List*. Click Insert.
6. Click Select All, and then click Insert again.
7. Select a Definition Type value of *Portal Registry Definitions*. Click Insert.
8. Select the portal name matching the Enterprise Portal database's default portal name.
9. Select the Related Definitions value of *Portal Registry Structures*. Click Insert.
10. Click Close.
11. Select File, Save Project As.
12. Enter the project name *PORTAL_81X_NNN_840_PPPP*, using the following naming convention:
 NNN: content provider node name. BP, CRM, EPM, ERP, HRMS or SA, for example.
 PPPP: Four-character portal registry name. EMPL, CUST, or SUPP, for example.
13. Click OK.
14. Close PeopleSoft Application Designer.

Task G-11-2: Cleaning the Copy of Production Portal Registry Project

To clean the Copy of Production portal registry project:

1. The following table lists Data Mover scripts that will clean the corresponding Copy of Production portal project definition.

Portal Name	Script Name
EMPLOYEE	PORTAL_81X_NNN_840_EMPL_CLEAN.DMS
CUSTOMER	PORTAL_81X_NNN_840_CUST_CLEAN.DMS
SUPPLIER	PORTAL_81X_NNN_840_SUPP_CLEAN.DMS

2. Use Data Mover to sign on to the Copy of Production database.
3. Open the Data Mover script from the <PS_HOME>\scripts\ directory that corresponds to the created Copy of Production portal project name as listed above.
4. Follow the directions as outlined in the Data Mover script text very carefully. To ensure that the replaced strings are replaced everywhere in the script, use the Edit, Replace All function.
5. Run this script against the Copy of Production database.
6. Close Data Mover.

Task G-11-3: Deleting the Copy of Production Database Two-Tier Mode Cache

To delete the Copy of Production database two-tier mode cache:

1. Start the Copy of Production database's Configuration Manager.
2. On the Startup tab, click the Purge Cache Directories button.
3. Select the Copy of Production database name.
4. Click Delete. Click OK. Click Close.
5. Close Configuration Manager (click OK).

Task G-12: Copying the Copy of Production Portal Registry Project

This section discusses:

- Copying the Copy of Production Portal Registry Project to File
- Copying the Copy of Production Portal Registry Project from File
- Deleting the Enterprise Portal Database Cache

Task G-12-1: Copying the Copy of Production Portal Registry Project to File

To copy the Copy of Production portal registry project to file:

Note. If you have copied a previous release content provider portal registry project into your Enterprise Portal (PA) database, you must remove that registry data. See the "Removing Content Provider Portal Data" appendix in this installation guide for instructions on how to remove the prior release content provider portal registry data.

1. Sign on to your Copy of Production database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. Select a Definition value of *Project*. Click Open. Highlight the PORTAL_81X_NNN_840_PPPP project name you just created. Click Open.
4. Select Tools, Copy Project, To File.
5. Click the Browse button for the Export Directory. Navigate to a temporary directory. Click OK.
6. Click Select All.
7. Click Copy. (This may take a few minutes.)
8. Close PeopleSoft Application Designer.

Task G-12-2: Copying the Copy of Production Portal Registry Project from File

To copy the Copy of Production portal registry project from file:

1. Sign on to your Enterprise Portal (PA) database in two-tier mode using PeopleSoft Application Designer.
2. Select Tools, Copy Project, From File.
3. Browse to the Copy of Production database server's temporary directory.

Note. If you cannot access the Copy of Production database server's temporary directory, then copy the portal project folder and files from the temporary directory to the Enterprise Portal (PA) database server's <PS_HOME>\Projects directory, and browse to that directory.

4. Select the *PORTAL_81X_NNN_840_PPPP* project name you just copied to file.
5. Click Open.
6. Click Select All.
7. Click Options.
 - a. On the Copy Options tab, select *English* and *COMMON*. If your Enterprise Portal (PA) database is a multilingual database, then also select the language(s) you have installed on your Enterprise Portal (PA) database.
 - b. Click OK.
8. Click Copy.
9. View the Output window on the Upgrade tab. All objects should have copied successfully.
10. Close PeopleSoft Application Designer.

Note. You do *not* need to create or alter any records or views.

Task G-12-3: Deleting the Enterprise Portal Database Cache

To delete the Enterprise Portal database cache:

1. Delete the Enterprise Portal (PA) database's application server cache.
2. Stop and start the Enterprise Portal (PA) database's web server service.

Task G-13: Updating Enterprise Portal Registry Folder Permissions

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, the folder permissions must be updated to reflect the changes. After the folder permissions are updated, you must delete the Enterprise Portal database's cache to reflect the changes.

The Portal Security Synchronization process for folders will update the portal registry parent folders to include all the permission lists of child folders and child content references. The process will first remove permissions from all parent folders. It will skip removing folder permission lists for any folder that does not have any children, or whose child content references are all marked as public. The process will then append all of the child folder and child content reference permission lists to the parent folder. It will not append permission lists to any parent folders that are marked as public.

To update the Enterprise Portal registry folder permissions:

Note. This process may take anywhere from a few minutes to a few hours, depending upon the volume of the portal data. The user ID that invokes this process must have the Portal Administrator security role or the process may terminate in an abend.

1. Sign on to your Enterprise Portal (PA) database.
2. Navigate to PeopleTools, Portal, Portal Security Sync.
3. Add a run control ID of *SECURITY_SYNC_XXXXXXX*, where *XXXXXXX* represents the portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
4. Enter the portal name matching the *XXXXXXX* of the run control's portal registry name; EMPLOYEE, CUSTOMER, or SUPPLIER; for example.
5. Clear the Update Content Reference Permissions option.
6. Select Update Folder Permissions.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.
11. Delete the Enterprise Portal (PA) database's application server cache.
12. Stop and start the Enterprise Portal (PA) database's web server service.

Task G-14: Updating the Enterprise Portal Default Homepage Tab

The copied content provider portal project may include registry entries for pagelets. To access the added pagelets from the homepage, the homepage tab definition must make these pagelets available.

To update the default homepage tab:

1. From your browser, sign on to the Enterprise Portal (PA) database.

2. Navigate to PeopleTools, Portal, Structure and Content.
3. Navigate within the Structure and Content page to Portal Objects, Homepage, Tabs.
4. Click the Edit link for the My Page tab content reference.
5. On the Tab Content tab, ensure that the Include All? option is selected for all pagelet categories, with the exception of the PeopleSoft Applications pagelet category.
6. Define the following settings for the PeopleSoft Applications pagelet category:
 - a. Clear the Menu pagelet option.
 - b. Select the Enterprise Menu pagelet option and set the value to *Req-Fix*.
 - c. Select all remaining pagelets and set the value to *Opt-Dflt*.
7. Click Save.

Task G-15: Discarding the Content Provider Copy of Production Database

A PeopleTools-only upgrade is not supported for the application database. After testing that the registry structures have been correctly installed into the Enterprise Portal (PA) database, you can archive or discard the 8.1x Content Provider Copy of Production database that was upgraded to PeopleTools 8.4x.

APPENDIX H

Installing FIN 8.4 Homepage Navigation

This appendix discusses:

- Understanding FIN 8.4 Homepage Navigation Installation
- Loading Report 509430000

Understanding FIN 8.4 Homepage Navigation Installation

Perform the tasks in this chapter only if you have copied the FIN 8.4 portal registry into the Enterprise portal (PA) database's EMPLOYEE default portal definition and you own one of the following products:

- Cash Management.
- Deal Management.
- Risk Management.
- Receivables.
- General Ledger.

Once the PeopleSoft Enterprise Portal is installed, the PeopleSoft Financials registry becomes a remote registry. A remote registry cannot be opened by way of the application programming interface (API). For this reason, the portal registry structures listed above along with supporting content have been moved into the Enterprise Portal database and registry.

Note. Apply this fix only to an Enterprise Portal database.

Task H-1: Loading Report 509430000

To load report 509430000:

1. Access report ID 509430000 in the Updates + Fixes section of PeopleSoft Customer Connection.
2. Follow the install instructions located in the report to complete the installation.

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