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# PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide

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# About This Documentation

This preface discusses:

- Audience
- Products Referenced in this Book
- Related Documentation

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**Note.** This book is designed to direct you through a basic installation of Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM) 9. It is not a substitute for the database administration manuals provided by your relational database management system (RDBMS) vendor, the network administration manuals provided by your network vendor, or the installation and configuration manuals for additional component products used with PeopleSoft.

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**Note.** Required updates to this installation documentation are provided in the form of "Required at Install" incidents, available on Oracle's PeopleSoft Customer Connection. In addition, specific installation steps for Oracle's PeopleSoft Enterprise PeopleTools and other applications are provided in separate documents. To find the necessary installation documentation, go to PeopleSoft Customer Connection, select Site Index, Installation Guides and Notes, and look under the subcategory for your applications.

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

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## Audience

This book is written for the individuals responsible for installing and administering Oracle's PeopleSoft environment. Oracle assumes that you are familiar with your operating environment and RDBMS, and that you have the necessary skills to support that environment. You also should have a working knowledge of SQL. Oracle recommends 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 Oracle PeopleSoft representative.

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## Products Referenced in this Book

This installation guide refers to these products:

- Oracle's PeopleSoft Enterprise PeopleTools, referred to as PeopleTools.
- Oracle's PeopleSoft Enterprise products, referred to as PeopleSoft.
- Oracle's PeopleSoft Enterprise Application Designer, referred to as Application Designer.

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## Related Documentation

To install additional component products for use with PeopleSoft applications, 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 PeopleSoft PeopleTools, you may wish to consult the following books:

- *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*: This includes information on configuring the PeopleSoft application server and supported web servers, data integrity tools, database level auditing, and PeopleTools utilities.
- *Enterprise PeopleTools 8.48 PeopleBook: Security Administration*: This includes information on setting up and modifying user access to PeopleSoft applications, and defines the various IDs and passwords used in installation.
- *Enterprise PeopleTools 8.48 PeopleBook: Data Management*: This includes information on PeopleSoft administrative utilities, such as Configuration Manager, Data Mover, Data Archive Manager, and so on.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Language Reference*: This includes reference information on the PeopleCode language, such as built-in functions, classes, meta-SQL, system variables, and so on.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Developer's Guide*: This includes general information about the PeopleCode editor, the Component Processor, the data buffers, and how to use specific functions and classes.
- *Reporting and Analysis Tools*: For information on PeopleSoft's reporting and analysis tools, see the Enterprise PeopleTools 8.48 PeopleBooks on Crystal Reports for PeopleSoft, PS/nVision, PeopleSoft Query, PeopleSoft Tree Manager, PeopleSoft Process Scheduler, and PeopleSoft Cube Manager.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer*: This includes information about the main tool for developing PeopleTools applications.
- *Enterprise PeopleTools 8.48 PeopleBook: Global Technology*: This includes information on the role of PeopleTools in the globalization of PeopleSoft applications.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine*: This includes information on the PeopleSoft proprietary batch programming tool.

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

# CHAPTER 1

## Installing PeopleSoft Enterprise CRM 9 Applications

This chapter discusses:

- Understanding the PeopleSoft CRM Installation
- Installing PeopleSoft PeopleTools and Databases
- Setting Up the PeopleSoft CRM Database
- Configuring an FTP Server for Storing Attachments
- Setting Start Values for Auto-Numbered Fields
- Installing the PeopleSoft Mobile Agent
- Configuring Computer Telephony Integration
- Activating Basic Data Summary and Messaging

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### Understanding the PeopleSoft CRM Installation

This guide explains the steps necessary to install Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM) 9 applications. Perform the steps in this guide after you successfully complete the PeopleSoft Enterprise PeopleTools installation, as described in the PeopleSoft Enterprise PeopleTools 8.4x Installation guide for your database platform.

See *PeopleSoft Enterprise PeopleTools 8.4x Installation (for your database platform)* PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, PeopleTools).

Oracle uses application productivity packs to deliver cumulative fixes and minor enhancements between service packs for major or minor application releases. These productivity packs are useful if you are upgrading or implementing a new release and want to ensure that you have the latest updates and fixes, before or shortly after go-live.

Productivity packs are:

- Delivered quarterly for the latest release.
- Ordered through Oracle's PeopleSoft Customer Care and delivered on a CD.
- Supported for as long as the major or minor release is supported.

Oracle recommends that you apply service packs or application bundles as they become available to benefit from the latest product level. If you fall behind on application bundles and cannot wait for the next service pack, the productivity pack provides all of the latest updates and fixes on one CD.

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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See "PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index," PeopleSoft Customer Connection, (Support, Documentation, Documentation Updates, Enterprise, Customer Relationship Management, All Products).

---

## Task 1-1: Installing PeopleSoft PeopleTools and Databases

This section discusses:

- Installing PeopleSoft PeopleTools
- Reviewing the Demo Database Sizing
- Creating a Search Collection on UNIX

### Task 1-1-1: Installing PeopleSoft PeopleTools

Install Oracle's PeopleSoft Enterprise PeopleTools as described in the PeopleSoft Enterprise PeopleTools 8.4x Installation guide for your database platform.

See *PeopleSoft Enterprise PeopleTools 8.4x Installation (for your database platform)* PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, PeopleTools).

PeopleSoft CRM requires that you specify a process scheduler server to use for workflow processes. If you choose to have a dedicated workflow server, you must set one up as you complete the tasks in the PeopleSoft Enterprise PeopleTools 8.48 Installation guide, "Setting Up Process Scheduler." You must specify a PeopleSoft CRM workflow server, regardless of whether you set up a dedicated server.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow."

---

**Note.** PeopleSoft CRM applications do not use any COBOL batch processes. If PeopleSoft CRM is the only PeopleSoft product line that you are installing, you do not need to run PSRUN.MAK nor compile or link any COBOL programs.

---

---

**Note.** PeopleSoft People Tools release 8.48 with minimum patch level 01 or higher is required at Install or Upgrade.

---

Three views that relate to PeopleSoft CRM integrations may not build using the build script. You can manually build these views by opening them in Oracle's PeopleSoft Enterprise Application Designer. These views are IMP\_IT\_PROP\_VAL, IMP\_IT\_PROP\_VW, and IMP\_IT\_PR\_LN1\_V.

To build these views in PeopleSoft Application Designer:

1. Launch PeopleSoft Application Designer.
2. Select Insert, Definitions into Project, to include these views in a project.

3. Select Build, Project, to build the project, and then select *Create Views* from the dialog box.

## Task 1-1-2: Reviewing the Demo Database Sizing

This table lists Demo database requirements for PeopleSoft CRM by RDBMS platform:

Platform	Approximate Database Size
DB2 LUW Ansi	7.0 GB
DB2 LUW Unicode	9.9 GB
DB2 z/OS Ansi	7.1 GB
DB2 z/OS Unicode	7.8 GB
Microsoft SQL Server Ansi	2.0 GB
Microsoft SQL Server Unicode	4.0 GB
Oracle Ansi	23 GB
Oracle Unicode	23 GB
Sybase Ansi	8 GB

**Note.** DB2 UDB for z/OS is the official IBM name for the RDBMS. For the sake of brevity, this documentation sometimes refers to DB2 UDB for z/OS as *DB2 z/OS*, and it sometimes refers to DB2 UDB for Linux, UNIX, and Microsoft Windows as *DB2/LUW*.

**Note.** For HP-UX, verify that your environment variable LC\_ALL contains the following setting:

*american.iso88591*

## Task 1-1-3: Creating a Search Collection on UNIX

To search records and documents in your PeopleSoft CRM applications:

1. Create a collection in your database.  
A collection is a set of special directories and files that the search engine uses to find and display source documents that match the criteria that you enter on the search page.
2. Configure UNIX servers to locate the PeopleSoft CRM search collection.  
You can do this by linking the UNIX utilities *sh* and *chmod* into the *<PS\_HOME>* directory of each process scheduler server by entering the following commands:

```
ln -s /bin/chmod $PS_HOME/chmod
ln -s /bin/sh $PS_HOME/sh
```

## Task 1-2: Setting Up the PeopleSoft CRM Database

This section discusses:

- Loading Active Analytics Framework Data

## Task 1-2-1: Loading Active Analytics Framework Data

To load Active Analytics Framework (AAF) data into the PeopleSoft CRM 9 databases:

1. Connect to the PeopleSoft CRM 9 database using PeopleSoft Data Mover (psdmt.exe) with your user ID and password.
2. Run the PeopleSoft Data Mover script `CRM_AAF_IMPORT.DMS`, found in the `%PS_HOME%\scripts` directory, against the system (SYS) database.

This script loads the definitions for all of the AAF objects (such as terms, policies, contexts, action types, and trigger points) into the PeopleSoft CRM database.

---

**Note.** Oracle provides translations of all end-user objects on the "Global Multi-Language" CD, including the PeopleSoft Data Mover scripts and .dat files referenced here. For Active Analytics Framework data, Oracle delivers a .dat file equivalent to `eocf_crm_sysdata.dat` for each language. The file names are `eocf_crm_sysdata_XXX.dat` where `XXX` denotes the language code. Run `eocf_crm_sysdata_XXX.dms` to import this data.

---

## Task 1-3: Configuring an FTP Server for Storing Attachments

PeopleSoft CRM applications allow you to add notes and attach supporting files to many objects. The file attachments are physically stored on an FTP server. In this task, you specify the application URLs that are used to save and retrieve file attachments.

To set the URLs for file attachments:

1. Set up an FTP server to store the attachments.  
There are no special requirements—any standard FTP server will do.
2. Log into PeopleSoft using a user ID that gives you access to the PeopleSoft PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.
4. Click the Search button on the URL Maintenance search page.

The database includes predefined URL identifiers. Each of these identifiers represents a particular type of attachment that is available in PeopleSoft CRM. The description indicates which PeopleSoft CRM product each identifier relates to:



URL Identifier	Description
<a href="#">FEDEX_TRACK</a>	Tracking URL for FedEx
<a href="#">FILEDB</a>	System attachment table
<a href="#">NLP_FTP</a>	NLP ftp site
<a href="#">NLP_KB</a>	NLP knowledge base and sample
<a href="#">NLP_TMP</a>	Temporary files
<a href="#">PPM_MONITOR</a>	PPM Monitor URL
<a href="#">PPM_PPMI</a>	PPM Interface URL
<a href="#">PT_QUERY_TOEXCEL</a>	Query To Excel IScript URL
<a href="#">PW_PRINT_PAGE</a>	Power Pricing Print Page
<a href="#">RA_ATTACHMENTS</a>	Campaign Management Attachment
<a href="#">RA_EXPORT_AUDIENCE</a>	Export audience to file
<a href="#">RAD_GHOST</a>	Standalone Advisor
<a href="#">RB_CORRMGT</a>	Correspondence Management
<a href="#">RB_CORRMGT_EXTRACT</a>	Upload CM files to FTP server
<a href="#">RB_CUST_ATTACH</a>	Customer Attachments
<a href="#">RB_IMP_ATTACH</a>	Import File Location
<a href="#">RB_PERS_NOTES_ATTACH</a>	Person Notes
<a href="#">RB_TRACK_CF</a>	Consolidated Freightways
<a href="#">RB_TSK_ATTACHMENTS</a>	Task Attachments

URL Maintenance Search page

**Note.** The URL Identifier RF\_FDM\_LINKS is not related to attachments. It is used in certain integration scenarios between PeopleSoft CRM and PeopleSoft Supply Chain.

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, "Integrating with PeopleSoft Applications."

- For each attachment type that you plan to use, select the URL identifier and enter the FTP server URL that the application uses to access this attachment type:

URL Maintenance page

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities."

## Task 1-4: Setting Start Values for Auto-Numbered Fields

To set the starting value for objects that use the Last Number Setup page (instead of the Auto-numbering page) to generate auto-numbered IDs, do the following:

1. Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers.

The Last Number Setup page appears.

2. Click the Refresh All Last Numbers button on the Last Number Setup page.

Last Number Setup					
Last Number Types					
Object Type	*Description	*Record (Table) Name	*Field Name	Last Number	Test
ACTI	Branch Script Action	RC_BS_ACTION	RC_ACTION_ID	300,094	
ATCH	File Attachment	BC_ATTACH	ATTACH_SEQ_NBR	20,001	
BODI	Directory Setup	BO_DIR_SETUP	SEARCH_FIELD_ID	300,004	
BP	Business Project Instance	RC_BP_STATUS	BUS_PROC_INSTAN	20,322	
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018	
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,100	

Last Number Setup page, 1 of 2

TOKE	Branch Script Token	RC_TOKEN	RC_TOKEN_ID	300,015	
USG	Usage ID	RBC_USAGE_DFN	RB_USAGE_ID	45	
VARI	Branch Script Variable	RC_VARIABLE	SCR_VAR_ID	300,151	

Last Number Setup page, 2 of 2

You can modify the values later using the Last Number Setup page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting General Options."

## Task 1-5: Installing the PeopleSoft Mobile Agent

You must install the PeopleSoft Mobile Agent *before* you install any of the following modules:

- PeopleSoft Enterprise Mobile FieldService
- PeopleSoft Enterprise Mobile Sales
- PeopleSoft Enterprise Mobile Order Capture

## See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Mobile Agent*

*PeopleSoft Enterprise PeopleTools 8.48 Installation (for your database platform), "Installing PeopleTools Mobile Agent."*

---

## Task 1-6: Configuring Computer Telephony Integration

PeopleSoft PeopleTools provides a MultiChannel Console header link for enabling Computer Telephony Integration (CTI). You must set up the user as a CTI agent to make this link visible.

See *PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook*, "Configuring CTI Application Pages."



PeopleSoft panel with the MultiChannel Console link

---

## Task 1-7: Activating Basic Data Summary and Messaging

The messaging mechanism and basic data summary are inactive when the PeopleSoft CRM system delivers. You must activate the messaging mechanism and basic data summary to enable Oracle's PeopleSoft Enterprise Online Marketing (OLM) basic profile population.

---

**Note.** This task is a requirement if you are installing Oracle's PeopleSoft Marketing or PeopleSoft OLM applications.

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See "Installing PeopleSoft Online Marketing 9."



## CHAPTER 2

# Installing PeopleSoft Correspondence Management

This chapter discusses:

- Understanding PeopleSoft Correspondence Management
- Identifying and Configuring FTP Servers
- Copying RTF and Text Templates to the FTP Server
- Registering the FTP Servers
- Installing Additional Component Software — Xpdf
- Reviewing PeopleSoft Correspondence Management
- Registering Microsoft Window Printers (Optional)
- Defining the CLASSPATH for Sun Java Mail Files

---

## Understanding PeopleSoft Correspondence Management

This chapter provides instructions for installing the additional component application requirements for Oracle's PeopleSoft Correspondence Management functionality within Oracle's PeopleSoft Enterprise CRM applications. Perform the following installation-related tasks to leverage the following PeopleSoft Correspondence Management features:

- The generation of Microsoft Word documents using templates.
- The conversion of Microsoft Word and text files into PDF documents.
- The printing of documents using network printers.

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Correspondence Management."

---

## Task 2-1: Identifying and Configuring FTP Servers

The FTP servers physically store correspondence templates and finished documents. These servers store other PeopleSoft Correspondence Management-related documents as well, such as intermediary XML files that the PeopleSoft Correspondence Management-specific process creates.

You can store the templates and the generated documents in a single FTP server or place them on separate FTP servers. You can also place these files in different folders.

Use the FTP server that is intended for storing PeopleSoft CRM attachments to store correspondence-related documents. The number of documents, their size and file management play a role in determining the need for one or more FTP servers that are exclusively reserved for PeopleSoft Correspondence Management.

After you identify the server and the folders where you plan to store the documents, you must specify the location of these servers in the form of URLs.

The PeopleSoft Correspondence Management functionality works with the following types of documents:

- Correspondence templates.
- Templates that are personalized by the agents for a specific correspondence request.
- Intermediary XML files that are created by PeopleSoft Correspondence Management-related processes.
- Merged documents.
- Attachments.

If you store all of these document types under a single folder on an FTP server, you can create a single URL in the procedure that follows. If you store these documents under different folders on single or multiple FTP servers, then you must create a URL for each of these unique locations.

To create the URLs to access PeopleSoft Correspondence Management-related documents:

1. Set up one or more FTP servers to store PeopleSoft Correspondence Management-related documents.

---

**Note.** There are no special requirements—any standard FTP server will do.

---

2. Log in to PeopleSoft with a user ID that gives you access to the PeopleSoft PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.
4. For each unique location that you plan to use, create a URL identifier and enter the URL for the FTP server that the application will use to access this type of document.

For example, the delivered RB\_CORRMGT URL definition:

**URL Maintenance**

**URL Identifier:** RB\_CORRMGT

**\*Description:** Correspondence Management

**\*URL:** ftp://anonymous:anonymous@ADNTP28/CRM/TEST/

**Comments:** Correspondence Management File Attachment URL.

URL Maintenance page

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities."

## Task 2-2: Copying RTF and Text Templates to the FTP Server

New PeopleSoft Correspondence Management customers must upload templates that have associated \*.rtf document files to the FTP server. To do this, you must upload the \*.rtf file to the applicable template and save the template. This causes the PeopleSoft Correspondence Management system to upload the \*.rtf file and the auto-generated \*.xsl file to the FTP server that you defined in your RB\_CORRMGT URL definition.

To upload templates to the FTP server:

1. Select Setup CRM, Common Definitions, Correspondence, Template.
2. Open an existing template.
3. Click the Upload a New File button.
4. Select your \*.rtf file.
5. Save the template.

Existing PeopleSoft Correspondence Management customers will have \*.dot files that associate with their templates. This format is not supported with the new PeopleSoft Correspondence Management infrastructure. You must convert all \*.dot files to \*.rtf files and then upload the files to the FTP server.

To convert \*.dot files to \*.rtf files:

1. Open your existing \*.dot files and re-save them as \*.rtf files.  
You can keep the same name, just change the format of the file.
2. After you create the \*.rtf file, open the corresponding template, upload the new \*.rtf file and then delete the \*.dot file from the template grid.
3. Save the Template.

This uploads the \*.rtf file to the FTP server and auto-generates the associated \*.xsl file.

## Task 2-3: Registering the FTP Servers

This process allows you to specify which URL the PeopleSoft Correspondence Management system needs to access the various types of documents. You can assign URL identifiers to the following categories:

- Template files
- Personalized templates
- Recipient XMLs
- Recipient documents
- Attachments

To register the FTP server for the PeopleSoft Correspondence Management system:

1. Select PeopleTools, Utilities, Administration, URLs to define the URL.  
The system data for the URL is RB\_CORRMGT. If required, modify the URL to point to your FTP.
2. Select Set Up CRM, Common Definitions, Correspondence, Install Options to configure the PeopleSoft Correspondence Management system installation.
3. Enter the following values for the environment settings:
  - In the Template File URL field, enter *RB\_CORRMGT*.
  - In the Personalized Template URL field, enter *RB\_CORRMGT*.
  - In the Recipient XML URL field, enter *RB\_CORRMGT*.
  - In the Recipient Doc URL field, enter *RB\_CORRMGT*.
  - In the Attachment URL field, enter *RB\_CORRMGT*.
4. You can create unique values for each of the URL files. To do this, you must create more URL definitions to point to the different FTP servers, and then add those URL definitions as the values for each of the URL file fields.

The screenshot shows the 'Environment Settings' page with the following fields and values:

Field	Value
*Template Files URL	RB_CORRMGT
*Personalized Templates URL	RB_CORRMGT
*Recipient XML URL	RB_CORRMGT
*Recipient Document URL	RB_CORRMGT
Attachment URL	RB_CORRMGT
Refresh Time (in Seconds)	5
Temp Directory	/tmp
*Sender's Email Address	support@rt.peoplesoft.com

Environment Settings page

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Defining Settings for Template-Based Correspondence."



## Task 2-4: Installing Additional Component Software — Xpdf

Xpdf is free software that you can obtain through the internet for use in printing PeopleSoft Correspondence Management documents. You can reference either PeopleSoft PeopleBooks or the Foolabs official website for information on how to obtain this software.

After you obtain the Xpdf software, you can install it anywhere on the application server machine. Update a configuration file to point to the Xpdf executable file. The name of the configuration file is *cm.properties* and can be found in: `<PS_HOME>\Appserv\CorrespondenceManagement\config\cm.properties`

Refer to the following example of a PeopleSoft Correspondence Management configuration file:

```
#####
# Correspondence Management Configuration File                                     #
#####

##### Log4j Configuration - Start #####

cm.logFolder = d:/pt846/cm/log/

log4j.rootCategory=DEBUG, A2

# Available levels are DEBUG, INFO, WARN, ERROR, FATAL

log4j.appender.A2=org.apache.log4j.DailyRollingFileAppender

log4j.appender.A2.datePattern='yyyy-MM-dd

log4j.appender.A2.append=true

log4j.appender.A2.layout=org.apache.log4j.PatternLayout

log4j.appender.A2.layout.ConversionPattern=%-5p %d{ISO8601} [%c] - %m%n

##### Log4j Configuration - End #####

##### PDF to PS Conversion Command - Start #####

pdf2ps.command = cmd /c d:/xpdf-3.00pl3-win32/pdftops.exe

##### PDF to PS Conversion Command - End #####
```

Example PeopleSoft Correspondence Management configuration file

Values of concern in this example configuration file are the *cm.logFolder* and *pdf2ps.command*.

To update the configuration file, do the following:

- `cm.logFolder`  
Replace `d:/pt846/cm/log/` with the path of your choice, to put all log files that relate to PeopleSoft Correspondence Management runtime data. For each PeopleSoft Correspondence Management (CM) transaction, a log file generates here with the CM id as the identifier.
- `pdf2ps.command`

Replace d:/xpdf-3.00pl3-win32/pdftops.exe with the path to your XPDF executable file that you just installed.

**Note.** You can install the XPDF software parser from the Foolabs official website.

## Task 2-5: Reviewing PeopleSoft Correspondence Management

There are two sections on the Install Options page (Setup CRM, Common Definitions, Correspondence, Install Options) that are relevant to functionality. The following sections populate by default and should not be changed:

- **Processing Library**—This section defines the location of the Sun Java files for use with PeopleSoft Correspondence Management.

These files are predelivered.

- **Undelivered Email Options**—This section defines the work list that is used for undeliverable emails.

When an email fails to deliver, PeopleSoft Correspondence Management attempts to resend the email. If the next attempt fails, a notification is sent to the work list to notify the administrator that a problem exists that requires investigation.

The following example shows the Processing Library page options that are predefined with the delivered files:

Processing Library page

## Task 2-6: Registering Microsoft Window Printers (Optional)

This installation task is optional but must be done if you want to print correspondence documents.

By associating printers with your server definitions, you create a list of printers that are available for selection in the Create Correspondence page. The user's printer selection then determines where the delivery process runs.

To support printing in geographically dispersed locations, it is most efficient to define the Process Scheduler servers that run the Print Delivery job in each location, and then associate to the printers with the nearest Process Scheduler server. You can set up servers for use solely for the printing process.

**Note.** The association is between the printer and the Process Scheduler server control where the Print Delivery job runs. Therefore, you must install this printer driver on the machine that the Process Scheduler server resides on.

To register printers:

1. Select Set Up CRM, Common Definitions, Correspondence, Printer Registration.
2. Specify the printer and any location information to inform users where to get the printed document.
3. Save the page.

Printer Information page

**Note.** Ensure that the printers that list on this page are mapped to the Process Scheduler server machine and can print for that machine.

## Task 2-7: Defining the CLASSPATH for Sun Java Mail Files

This task ensures that you use the correct Sun Java Mail class files. The class files can be found in the JAR file *mail.jar*, found in the `<PS_HOME>/class` directory. This directory contains many JAR files, some also include Sun Java Mail class files. The other versions of Sun Java Mail may not be correct. You must ensure that the correct Sun Java Mail class files in *mail.jar* are used at runtime.

To do this, you must update the CLASSPATH in the Application server and Process Scheduler server configuration files to load the *mail.jar* file first.

- Application Server configuration file, found in:  
`<PS_HOME>/appserv/[domain name]/psappsrv.cfg`
- Process Scheduler Server configuration file, found in:  
`<PS_HOME>/appserv/prcs/[domain name]/psprcs.cfg`

In both of these configuration files, you can see a section in the [PSTOOLS] for setting the CLASSPATH:

```
;Uncomment JavaVM Shared Library= to use a non-default JVM library.  
;If you do so, you will probably have to set some environment variables to get  
;the JVM to load and run correctly,depending on the operating system and the JVM.  
;For the default JVM library,these environment variables are set by psconfig.sh.  
;JavaVM Shared Library=  
Add to CLASSPATH=
```

Update this to read:

```
;Uncomment JavaVM Shared Library= to use a non-default JVM library.  
;If you do so, you will probably have to set some environment variables to get  
;the JVM to load and run correctly,depending on the operating system and the JVM.  
;For the default JVM library,these environment variables are set by psconfig.sh.  
;JavaVM Shared Library=  
Add to CLASSPATH=<PS_HOME>/class/mail.jar;
```

Where you substitute <PS\_HOME> with the physical drive location (for example: c:\PT8.47)

---

**Note.** You must restart the servers after making these changes.

---

## CHAPTER 3

# Installing PeopleSoft Online Marketing 9

This chapter discusses:

- Understanding the PeopleSoft OLM Setup
- Prerequisites
- Configuring PeopleSoft OLM System Parameters
- Setting Up the FTP Server URL for File Upload
- Setting Up the Web Profile to Bypass the Sign-In Page
- Assigning PeopleSoft OLM Self-Service Permissions
- Setting Up PeopleSoft OLM Integration Points
- Modifying the Dialog Execution Server Deployment Descriptor
- Installing the DES on an Oracle Application Server
- Installing the DES on an IBM WebSphere Server
- Installing the DES on a WebLogic Server
- Retrieving and Installing JDBC Drivers
- Testing the DES Installation
- Testing the Email Server
- Adding Standalone Dialog Servers (Optional)
- Setting Up Profiles
- Tuning the System (Optional)

---

## Understanding the PeopleSoft OLM Setup

This chapter provides instructions for installing and setting up Oracle's PeopleSoft Enterprise CRM Online Marketing (OLM) server and related components.

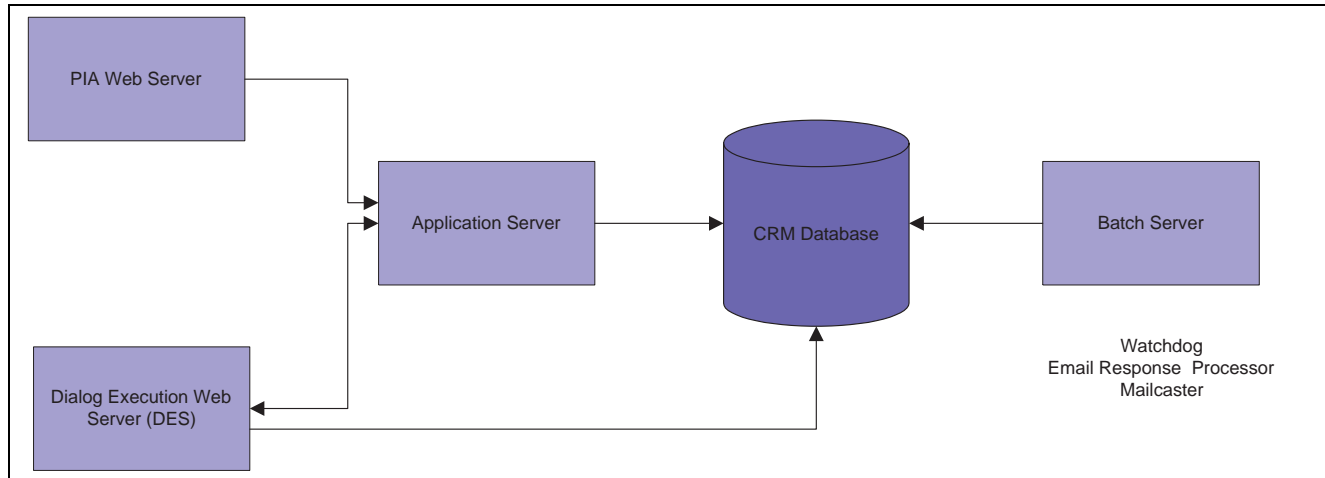
---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

**Note.** If you are running Oracle, ensure that your client connectivity, database and JDBC versions match. For example, if your database is on 10.2.0.3, ensure that your client connectivity matches the database version, as well as the JDBC version. PeopleSoft OLM does not support mixed versions.

The following diagram shows the PeopleSoft CRM OLM architecture:



PeopleSoft Enterprise OLM architecture

The overall process for installing the PeopleSoft CRM OLM server and related components includes the steps that we outline here.

To install the PeopleSoft CRM OLM system:

1. Install the database (for example, Oracle 10g).

**Note.** If you are running DB2/LUW from HP-UX and you plan to install a non-Unicode PeopleSoft CRM database, verify that your environment variable *LANG* in the HP-UX system has a character set of *iso88591*; for example, *en\_US.iso88591*. Otherwise, the JDBC connection error "Encoding not supported!" will occur in OLM components. Before you create the database, you must change the HP-UX default codepage from Roman8 to the character set that you will use for the database; that is, export *LANG=en\_US.iso88591*.

2. Install and configure the PeopleSoft CRM 9 database and software (PeopleSoft PeopleTools, Tuxedo, and so on).
3. Install an additional component SMTP-compliant email server; for example, L-Soft LSMTP or IronPort.

**Note.** Oracle does not provide this software; you must purchase it separately.

4. Install PeopleSoft OLM components.

For example: Dialog Execution Server, Mailcaster, Email Response Processor.

See Appendix: "Reviewing Tablespaces and Parameters for PeopleSoft CRM Online Marketing"

---

## Prerequisites

Before you begin the PeopleSoft CRM OLM installation, ensure that these requirements are met:

- You have the PeopleSoft CRM 9 CD.
- Your PeopleSoft CRM environment is fully functional, with the PeopleSoft Application Server, Tuxedo, and at least one Tuxedo Batch Server installed.
- Oracle's PeopleSoft Pure Internet Architecture web server is installed.
- The JOLT publish/subscribe servers are configured for your application server.
- The Process Scheduler server is installed.
- The Dialog administrator *Dialog Administrator* and Process Scheduler administrator *ProcessSchedulerAdmin* roles are assigned to your Administrator user ID.
- You have the correct configuration and kernel settings on UNIX.

---

**Note.** Before making the following changes, check with your UNIX system administrator and hardware vendor to ensure that these recommendations are compatible with your system.

---

The kernel file/etc/system should be configured with the following values for file descriptors:

```
* set soft limit on file descriptors
set rlim_fd_cur=1024
* set hard limit on file descriptors
set rlim_fd_max=4096
```

- If you intend to use Microsoft SQL Server as a database server, then you should download the appropriate Microsoft JDBC driver from Microsoft's website now. At the time of print, version 1.2 was the latest version available. Follow the instructions provided by Microsoft to extract the sqljdbc4.jar file from the download. Copy this file to a directory that you will remember, for example, C:\temp, as you will need this file later in the install.

PeopleSoft OLM does not run on all hardware and software platforms that PeopleSoft PeopleTools supports. You must ensure that your hardware and software are compatible by reviewing the PeopleSoft Enterprise CRM 9 Hardware and Software Requirements guide, available on Oracle's PeopleSoft Customer Connection website.

### See Also

Installing the DES on an Oracle Application Server

Installing the DES on an IBM WebSphere Server

Installing the DES on a WebLogic Server

"PeopleSoft Enterprise CRM 9 Hardware and Software Requirements Guide"

## Task 3-1: Configuring PeopleSoft OLM System Parameters

This task describes the parameters that the Dialog Execution Server (DES) and Mailcaster use. You must set the following parameters before you install the PeopleSoft OLM servers.

**Note.** The parameters that WatchDog and Email Response Processors use are described in the *PeopleSoft Enterprise Online Marketing 9 PeopleBook*.

To set parameter values:

1. Select Set Up CRM, Product Related, Online Marketing, Settings

The Dialog Execution Server Settings page appears.

Name	*Value
ConnectId	sacrm
ConnectPswd	NzKvcREXBww=
broadcastRequestDESTimeout	30
bulkMailerDropDedup	true
cgiProgramPath	/DCS/
companyBasicsProfileName	Companies
contactBasicsCompanySysIdElementName	Company ID
contactBasicsProfileName	People
dedupIndexSpace	[DEFAULT]
dedupTableSpace	[DEFAULT]
defaultDateFormat	YYYY-MM-DD
defaultTimeFormat	HH:MM AM/PM

**Password Encryption Utility**

Password:  Confirm Password:   
 Encrypt  Encrypted Password:

Dialog Execution Server Settings page

2. Set the following parameters as specified:

**Note.** If a parameter does not appear on the Dialog Execution Server Settings page, click the Add button to add the parameter. Some entries list here as “PSCipher encrypted.” Use the encryption utility at the bottom of the Dialog Execution Server Settings page to encrypt these values.

- defaultURLBase—the URL for the Dialog web server, including the port number.  
The format is *http://www.foo.com:82*.
- psAppServerURL—the host and port of Tuxedo.  
The format is *//appserv.foo.com: 9000*.



- **psToolsRel**—the PeopleSoft PeopleTools version of Tuxedo.

The format is *8.48.03*. Update this variable after every PeopleSoft PeopleTools release or PeopleSoft PeopleTools patch upgrade.

- **psPIAServerURL**—the CRM PeopleSoft Pure Internet Architecture server, including the port number.

The format is *http:// <CRM PIA web server:port>*.

- **smtpServerNames**—the mail servers (separated by semicolon), including the port numbers and thread counts, for use by the mailcasters.

The number of send mail threads must be at least 1, and no larger than 500. The default if none is specified is 1, and if a number greater than 500 is specified, 500 is used. The default port number is 25.

The format is *mail1.foo.com:25:threads=5;mail2.foo.com:25:threads=5*.

- **psOperatorId**—the application server operator ID.
- **psOperatorPassword**—the application server operator password (PSCipher encrypted).
- **psIBLocalNode**—the local node of PeopleSoft Integration Broker.
- **psIBLocalNodePassword**—the PeopleSoft Integration Broker password (PSCipher encrypted).
- **dbVendor**—the value depends on the RDBMS.

Enter *DB2 z/OS, ORACLE, or MSSQL*.

- **dedupIndexSpace**—the value depends on the RDBMS.

For MSSQL use *[DEFAULT]*, for Oracle set to *RYWORK*, or for DB2UDB set to *RYWORKIDX*.

- **dedupTableSpace**—the value depends on the RDBMS.

For MSSQL set to *[DEFAULT]*, for Oracle set to *RYWORK*, or for DB2UDB set to *RYWORK*.

- **ConnectId**—the database user name.
- **ConnectPswd**—the database users password (PSCipher encrypted).
- **jdbcDriver**—the class name of the JDBC driver that you use.

This should be one of the following:

For MSSQL, enter *com.microsoft.sqlserver.jdbc.SQLServerDriver*.

For Oracle, enter *oracle.jdbc.driver.OracleDriver*.

For DB2UDB, enter *com.ibm.db2.jcc.DB2Driver*.

- **dbServerURL**—the JDBC connection URL.

This value contains information about the database server, port (when applicable) and database instance. The format of the URL is also dependent on the JDBC driver. The available formats are as follows:

For MSSQL, use *jdbc:sqlserver://server:port;DatabaseName=dbInstance;sql70=true;charset=Cp1252*.

For Oracle, use *jdbc:oracle:thin:@server:port:dbInstance*.

For DB2UDB, use *jdbc:db2://server:port/dbInstance*.

You can set parameters directly in the configuration file for the specific component. Parameters that you save in these locations have the following precedence:

- The highest precedence are the configuration files (for example: *DES.config*, *MCR.config*, *ERP.config* and *WDG.config*). PeopleSoft OLM always uses the values that are set in the configuration files.

- The lowest precedence is the Dialog Execution Server Settings page. Values that you define on the Dialog Execution Server Settings page are overridden by values set in the other locations.

The advantage of using the Dialog Execution Server Settings page is that the settings are used globally. This provides easier system maintenance. Use configuration files only for the database connection values.

---


## Task 3-2: Setting Up the FTP Server URL for File Upload

The File Upload feature of PeopleSoft CRM OLM requires an FTP server. You must specify the URL for the FTP server in the PeopleSoft CRM system.

To specify the FTP URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Search for the *RY\_ATTACHMENTS* URL and open it.

The URL Maintenance page appears.



URL Maintenance page

3. Verify that the *RY\_ATTACHMENTS* URL in the URL field contains the value of a valid FTP server location for use by PeopleSoft CRM OLM during the file upload procedure.

If this URL is no longer valid or the location of the FTP server has changed, you must update this URL accordingly.

---

## Task 3-3: Setting Up the Web Profile to Bypass the Sign-In Page

To access the PeopleSoft CRM Self-Service component directly from the Dialog Login page, the PeopleSoft Pure Internet Architecture web profile must be set to sign in by default. This means that you must bypass the PeopleSoft Pure Internet Architecture sign-in page.

To set up the web profile:

1. Decide which PeopleSoft Pure Internet Architecture server needs to bypass the sign-in page.

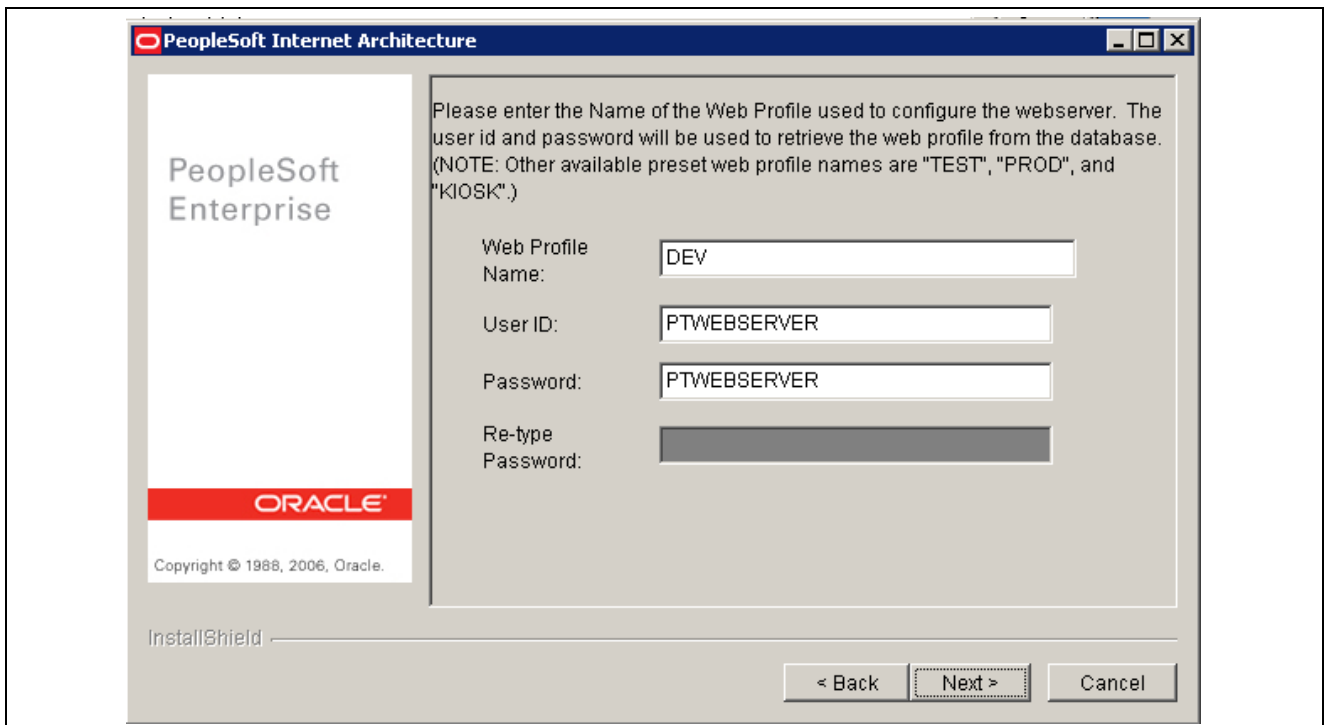
2. Open the *configuration.properties* file and note the value of the WebProfile parameter (for example, *DEV*).

**Note.** The default location of the *configuration.properties* file is:

For PeopleSoft Pure Internet Architecture on WebLogic and IBM WebSphere: <%PS\_HOME%>\webserver\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

For PeopleSoft Pure Internet Architecture on the Oracle Application Server (OAS):  
<%OAS\_HOME%>\j2ee\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

The value of the Web Profile parameter was specified in the Web Profile Name field during the PeopleSoft Pure Internet Architecture installation, as shown here:



PeopleSoft Internet Architecture: Web Profile page

3. Select PeopleTools, Web Profile, Web Profile Configuration.
4. Search for and open the web profile that is defined in the *configuration.properties* file (for example, *DEV*).
5. Select the Security tab.
6. In the Public Users section, select the Allow Public Access check box, and then select *SAGUEST* in the User ID and Password fields.

Web Profile page: Security tab

7. Click Save.
8. Restart the PeopleSoft Pure Internet Architecture server.

## Task 3-4: Assigning PeopleSoft OLM Self-Service Permissions

This section discusses:

- Understanding PeopleSoft Self-Service Permissions
- Registering a PeopleSoft OLM User in Self-Service
- Assigning PeopleSoft OLM User Self-Service Roles

### Understanding PeopleSoft Self-Service Permissions

You must assign the PeopleSoft Order Capture Self Service (OCSS) permission to the PeopleSoft OLM user. Users *SAGUEST* and *OLM* deliver with the appropriate self-service settings.

**Note.** For users *SAGUEST* and *OLM*, you can skip this task.

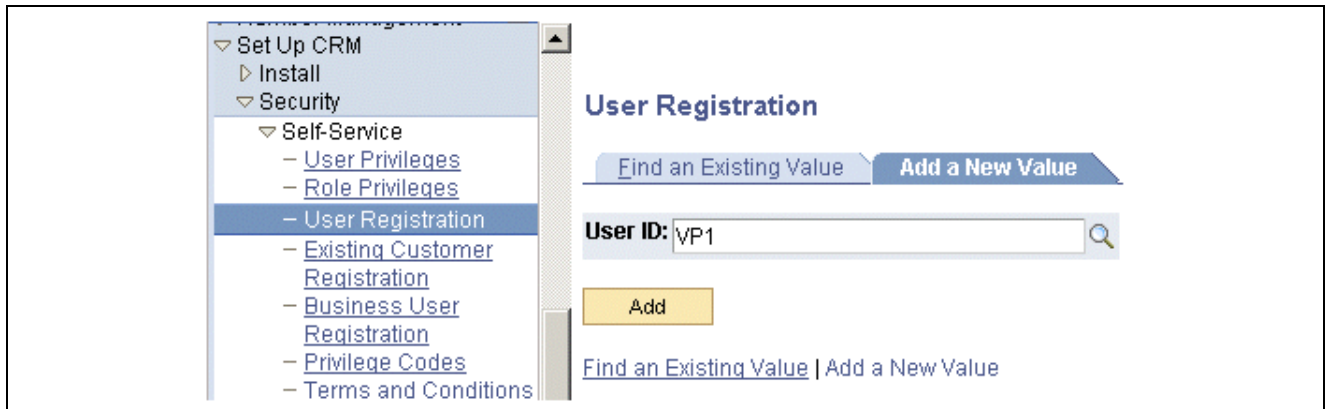
To add new PeopleSoft OLM users as self-service users, follow the procedures in this section *if*:

- The user requires execution of a dialog that includes creating a self-service user from the Dialog Link Report (this is not common).
- The user is a self-service “dummy” GUEST user (for example, *SAGUEST*) that requires the ability to register new users from the Dialog Login page.

### Task 3-4-1: Registering a PeopleSoft OLM User in Self-Service

To register a PeopleSoft OLM user in the self-service application:

1. Select Set Up CRM, Security, Self-Service, User Registration.  
The User Registration page appears.
2. Select the Add a New Value tab and enter a user ID (for example, *VPI*).



User Registration page: Add a New Value tab

3. Click Add.
4. Refer to this User Registration Setup page example, and then complete your page with the information that follows:

**User Registration Setup**

User ID VP1

Confirm Guest Password

\*Password \*\*\*

Password Security Policy

☒ Password Never Expires  
☐ Password Expires inDays 0

Copy Default Consumer Options

Consumer Name SHAREConsumer Template

Permission Lists

\*Process Profile ALLPAGES  
\*Primary ALLPAGES

Customer Registration Fields

Template Email and Name Template

Terms and Conditions

Terms and Conditions SetID

Transfer To

☒ Catalog  
☐ Customer Care

Grant Consumer Role(s)

*Role Name	Description		
Consumer	Consumer	+	-
EOPP_USER	Common Portal User	+	-
PAPP_USER	Enterprise Portal User	+	-

Grant Business User Role(s)

*Role Name	Description		
Customer	Customer	+	-
EOPP_USER	Common Portal User	+	-
PAPP_USER	Enterprise Portal User	+	-

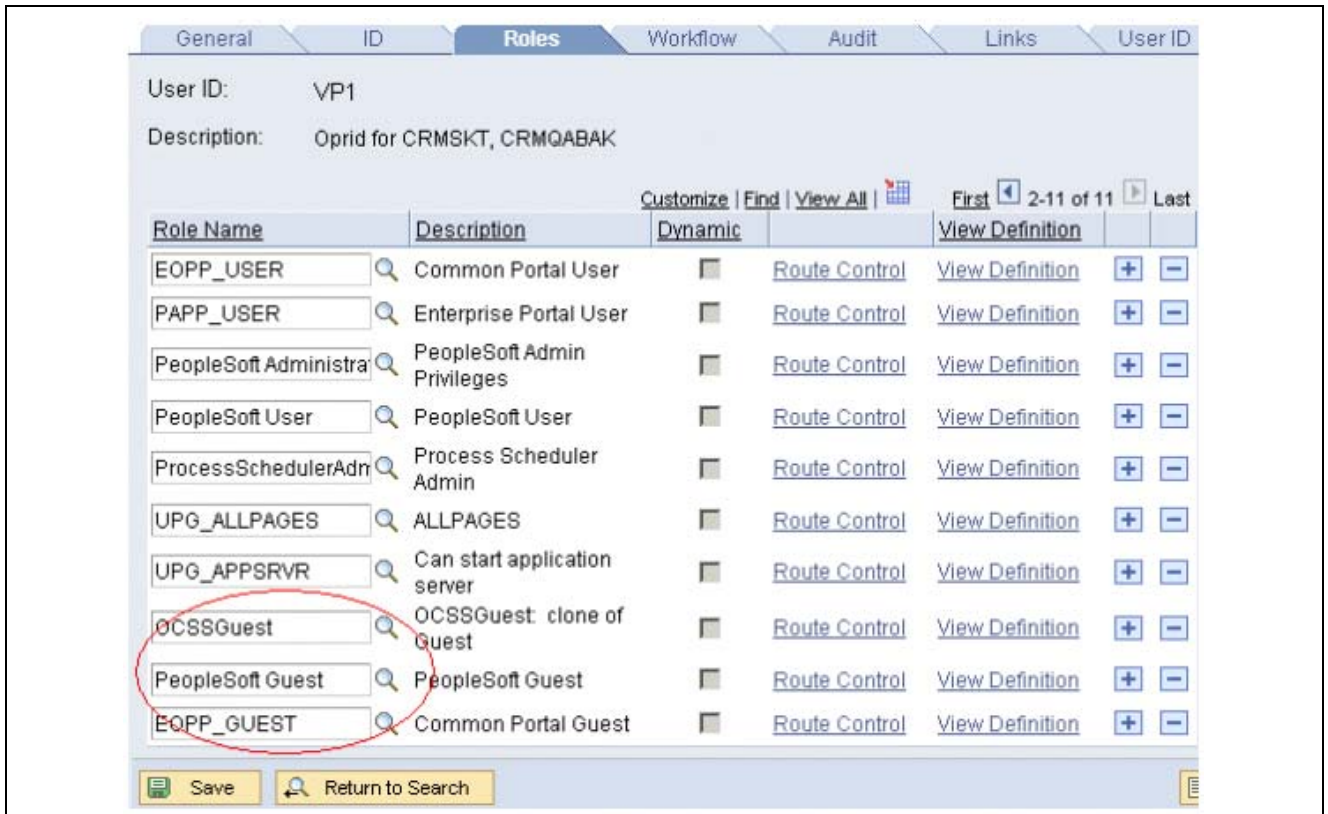
User Registration Setup page

- In the Password Security Policy section, select the Password Never Expires option.
  - In the Copy Default Consumer Options section, in the Consumer Name field, enter *SHAREConsumer Template*.
  - In the Permission Lists section, in the Process Profile and Primary fields, enter *ALLPAGES*.
  - In the Customer Registration Fields section, in the Template field, select *Email and Name Template* from the drop-down list.
  - In the Transfer To section, select the Catalog option.
  - Under Grant Consumer Role(s), add the role names *Consumer*, *EOPP\_USER*, and *PAPP\_USER*.
  - Under Grant Business Role(s), add the role names *Consumer*, *EOPP\_USER*, and *PAPP\_USER*.
5. Click Save.

## Task 3-4-2: Assigning PeopleSoft OLM User Self-Service Roles

To assign self-service roles to a PeopleSoft OLM user:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. Search for the appropriate user ID (for example, *VP1*) and select the Roles tab.
3. Ensure that you add the following three roles to the list of role names, as shown in this example:



User Roles tab

- OCSSGuest
- PeopleSoft Guest
- EOPP\_GUEST

4. Click Save.
5. If you receive the following message, click OK:

Warning -- PERSON\_ID = '<a ID>' assigned to another User ID.

6. Select the ID tab and then select *Person* from the ID Type drop-down list.
7. Enter a person ID in the Attribute Value field, and note the person ID or person name (in the following example, *100946* or *Template*, *SHAREConsumer*).



General ID Roles Workflow Audit Links User ID Queries

User ID: VP1  
Description: Oprid for CRMSKT, CRMQABAK

ID Types and Values Find | View All First 1 of 1 Last

ID Type: Person

Attribute Name	Attribute Value	Description
Person ID	100946	Template, SHAREConsumer

User Description

Description: Oprid for CRMSKT, CRMQABAK  
[Set Description](#) or type in User Description.

Save Return to Search Add Update/Display

ID tab

This person is defined in the Demo database with both business contact and consumer roles.

**Note.** If you are working on the system database, you must create a person first, and that person should have both business contact and consumer roles. For information about Person creation, refer to the *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*.

8. Click Save.

## Task 3-5: Setting Up PeopleSoft OLM Integration Points

This section discusses:

- Understanding PeopleSoft OLM Messages
- Loading Gateway Connectors
- Setting PeopleSoft Integration Security Properties
- Setting Up the URL for the PSFT\_OLM Node

### Understanding PeopleSoft OLM Messages

PeopleSoft CRM OLM uses XML messages that are sent directly to PeopleSoft Integration Broker using JOLT. Additionally, messages are used to update the PeopleSoft OLM Activation Framework whenever a profile status is modified. The following tasks set up PeopleSoft OLM internal enterprise integration points (EIP).

#### Task 3-5-1: Loading Gateway Connectors

To load Gateway connectors:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search.



3. Replace `<webserver>:<port>` with this URL:

`http://<webserver>:<port>/PSIGW/PeopleSoftListeningConnector`

4. Click Load Gateway Connectors.
5. Click Save.

**Note.** To ensure proper routing of messages, ensure that the gateway properties is set up with both the default integration broker node, PSFT\_CR, and the default OLM node, PSFT\_OLM, as shown in the following example:

**PeopleSoft Node Configuration**

URL: `http://ui-lab064.peoplesoft.com:8000/PSIGW/PeopleSoftListeningConnector`

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release
<code>//ui-lab064.peoplesoft.com:9000</code>	VP1	...	8.49.11

PeopleSoft Nodes

Node Name	App Server URL	User ID	Password	Tools Release		
PSFT_CR	<code>//ui-lab064.peoplesoft.com:9000</code>	VP1	...	8.49.11	Ping Node	+ -
PSFT_OLM	<code>//ui-lab064.peoplesoft.com:9000</code>	VP1	...	8.49.11	Ping Node	+ -

Advanced Properties Page

OK Cancel Save

Example of PeopleSoft Node Configurations

## Task 3-5-2: Setting PeopleSoft Integration Security Properties

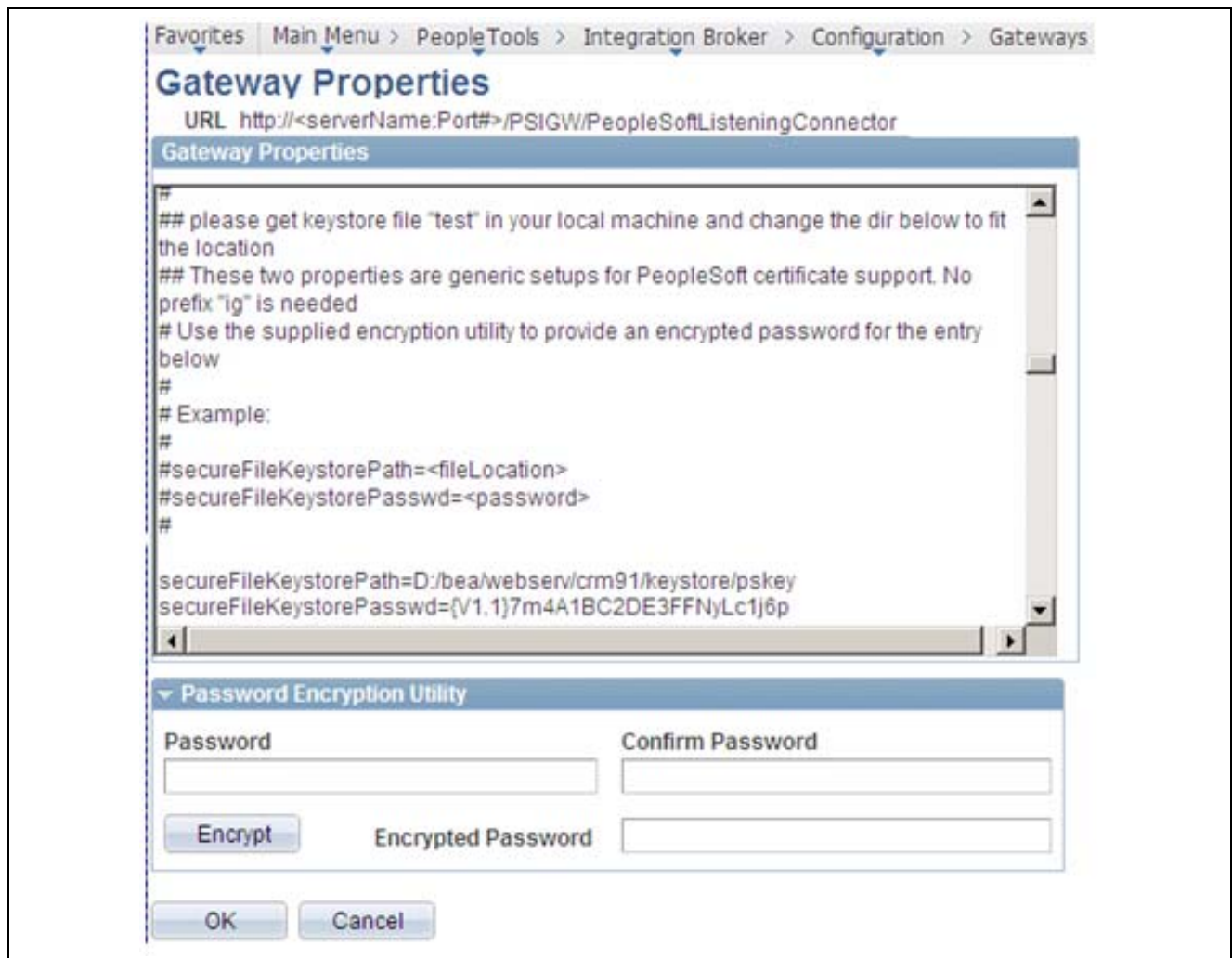
For PeopleSoft PeopleTools 8.50 and above, encryption of the Gateway property `secureFileKeystorePasswd` is required. For more details about gateway property and encryption requirements, see *PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration*, for your database platform.

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for and open the Local Gateway.
3. Click the Gateway Setup Properties link, and then login to the Gateway Properties.
4. Click the Advanced Properties link, then locate the property `secureFileKeystorePasswd` and verify that it is encrypted.

If this property is *not* encrypted, use the Password Encryption utility that is available at the bottom of the Gateway Properties - Advanced Properties page to encrypt the password value. This replaces the plain password with an encrypted value and fulfills the requirement.

5. Click OK, and then click Save to save your settings.
6. Click OK to exit the Gateway Properties page.
7. Click Save again, to save the changes that you made to the Gateway.

**Warning!** Integrations will fail if you do not set the path to the keystore using the *secureFileKeystorePath* property and enter an encrypted keystore password for the *secureFileKeystorePasswd* property.



Gateway Properties - Advanced Properties page showing the Password Encryption utility and an encryption example

### Task 3-5-3: Setting Up the URL for the PSFT\_OLM Node

To set up the URL for the PSFT\_OLM node:

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
2. Search for and open the PSFT\_OLM node.
3. Select the Connectors tab.
4. Modify the PRIMARYURL property, replacing <webserver>:<port> with the Dialog Execution Server (DES) name and port:

```
http://<webserver>:<port>/DCS/DlgBroker
```

5. Click Save.

---

**Note.** If you do not set up the Gateway, the connector HTTPTARGET will not be available.

---

## Task 3-6: Modifying the Dialog Execution Server Deployment Descriptor

Before you install the Dialog Execution Server (DES) application, you must go to Oracle's MetaLink to access *bundle 21 for PeopleSoft Enterprise CRM 9*, and then do one of the following:

- If you are using PeopleSoft PeopleTools 8.49 or later, you must retrieve and apply *bundle 21* to automatically update the DES deployment descriptor. No further action or modification is required.
- If you are using PeopleSoft PeopleTools 8.49 or earlier on bundles prior to bundle 21 for the application.xml file, you must manually modify the DES application.xml and replace this file in the crm\_omk.wl.ear file before you install the DES to avoid DES installation failure.

The following is an example of the application.xml file that works fine with PeopleSoft PeopleTools 8.49.

If the file is in PeopleSoft PeopleTools 8.49 format, it should appear as shown here:

```
<?xml version="1.0" encoding="UTF-8"?>
<!--DOCTYPE application PUBLIC "-//Sun Microsystems, Inc.//DTD J2EE Application
1.3//EN" "http://java.sun.com/dtd/application_1_3.dtd"-->
<!-- ***** -->
<!-- Confidentiality Information: -->
<!-- -->
<!-- This module contains confidential and proprietary information -->
<!-- of Oracle; it is not to be copied, reproduced, or transmitted -->
<!-- in any form, by any means, in whole or in part, nor is it to -->
<!-- be used for any purpose other than that for which it is -->
<!-- expressly provided under the applicable license agreement. -->
<!-- -->
<!-- Copyright (C) 2007 Oracle. All Rights Reserved. -->
<!-- ***** -->
<application id="Application_ID" version="1.4"
xmlns="http://java.sun.com/xml/ns/j2ee"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://java.sun.com/xml/ns/j2ee
http://java.sun.com/xml/ns/j2ee/application_1_4.xsd">
<display-name>crm9</display-name>
<module id="WebModule_1077315443227">
<web>
<web-uri>com.peoplesoft.crm.omk.war</web-uri>
<context-root>/DCS</context-root>
</web>
</module>
</application>
```

These instructions describe how to manually modify the application.xml file when using PeopleSoft PeopleTools 8.48 or earlier:

---

**Note.** The installation directory for PeopleSoft PeopleTools 8.48 is: [PS\_HOME]/setup/mpwebappdeploy

The installation directory for PeopleSoft PeopleTools 8.49 is: [PS\_HOME]/setup/ PsMpWebAppDeployInstall

---

1. In general, when you extract the application.xml file, a folder by name Meta-inf will be automatically created in the C drive, and the file will automatically be extracted to C:\META-INF
2. Extract the *application.xml* file from the *crm\_omk\_wl.ear* file using your WinZip or tar utility.  
The *crm\_omk\_wl.ear* file is located at: PS\_HOME\setup\ PsMpWebAppDeployInstall\archives
3. After you extract the file, check the properties of the extracted application.xml file to verify that the read only check box is clear.
4. Open the application.xml file with a text editor.
5. Uncomment the following line:

```
<!DOCTYPE application PUBLIC "-//Sun Microsystems, Inc.//DTD J2EE Application⇒
1.3//EN" "http://java.sun.com/dtd/application_1_3.dtd">
```

6. Remove the following lines:

```
version="1.4"
xmlns="http://java.sun.com/xml/ns/j2ee"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://java.sun.com/xml/ns/j2ee
http://java.sun.com/xml/ns/j2ee/application_1_4.xsd">
```

This is an example of what the final file content in the application.xml should be for PeopleSoft PeopleTools 8.48 *after* conversion from PeopleSoft PeopleTools 8.49:

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- ***** -->
<!-- Confidentiality Information: -->
<!-- -->
<!-- This module contains confidential and proprietary information -->
<!-- of Oracle; it is not to be copied, reproduced, or transmitted -->
<!-- in any form, by any means, in whole or in part, nor is it to -->
<!-- be used for any purpose other than that for which it is -->
<!-- expressly provided under the applicable license agreement. -->
<!-- -->
<!-- Copyright (C) 2006 Oracle. All Rights Reserved. -->
<!-- ***** -->
<!DOCTYPE application PUBLIC "-//Sun Microsystems, Inc.//DTD J2EE Application⇒
1.3//EN" "http://java.sun.com/dtd/application_1_3.dtd">
<application id="Application_ID">
<display-name>crm9</display-name>
<module id="WebModule_1077315443227">
<web>
<web-uri>com.peoplesoft.crm.omk.war</web-uri>
<context-root>/DCS</context-root>
</web>
</module>
```

```
</application>
```

---

**Note.** If you are using PeopleSoft PeopleTools 8.48 or earlier, you must manually modify the DES application.xml file before you install the DES to avoid DES installation failure.

---

7. Save the file and add this file back to the *crm\_omk\_wl.ear* file.

---

**Note.** Be sure to note the path of the application.xml file while opening it with WinZip. The path should be meta-inf.

---

8. While in WinZip mode, highlight and right-click the application.xml file and select Delete, to delete the original application.xml from the Zip file.

---

**Note.** The modified application.xml file is available under the extracted folder (C:\Meta-inf).

---

9. Click the Add icon on the WinZip menu to add the new application.xml file.

The ear file is not yet ready for use until the weblogic.xml file is modified.

10. After the DES installs properly, the application.xml file resides in the following locations. Verify these locations:

- For OAS:

`<OraHome>\j2ee\omk\applications\omk\DES\META-INF\application.xml`

- For IBM WebSphere:

`<WebSphereHome>/AppServer/webserv/an-ibm01Node_an-ibm01Node_server1/omk.ear/META-INF\application.xml`

- For WebLogic:

`PS_HOME\webserv\omk\applications\crm9\META-INF\application.xml`

---

**Note.** Specific to the February 2009 update, if you are using PeopleSoft PeopleTools 8.49 or later, the corresponding bundle provides an automatic update. No further action is required.

---

## Task 3-7: Installing the DES on an Oracle Application Server

This section discusses:

- Understanding the DES Installation on the OAS
- Installing the DES on OAS for Microsoft Windows
- Installing the DES on OAS for UNIX
- Starting the DES on OAS

### Understanding the DES Installation on the OAS

You cannot use an existing PeopleSoft Pure Internet Architecture application on the Oracle Application Server (OAS) for the Dialog Execution Server (DES). You also cannot use the PeopleSoft Pure Internet Architecture HTTP/HTTPS port number for the Dialog Execution Server HTTP/HTTPS port number.

---

**Important!** Before you install the Dialog Execution Server (DES) application on the Oracle Application Server (OAS), you must review the task *Modifying the Dialog Execution Server Deployment Descriptor*, to determine if you must manually modify the DES deployment descriptor before proceeding with your DES installation.

---

**Note.** Restart the OAS after the Dialog Execution Server installation completes, to ensure that OAS initializes all parameters.

---

## Task 3-7-1: Installing the DES on OAS for Microsoft Windows

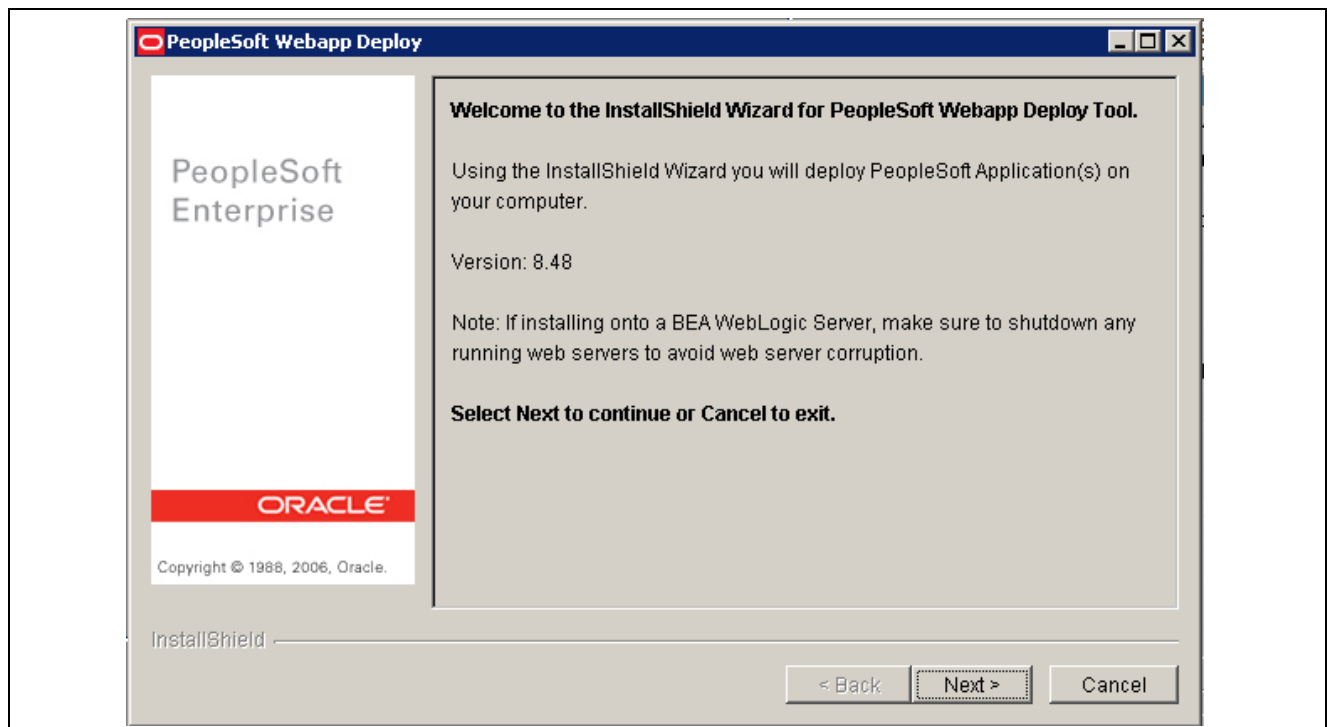
To install the DES application on the OAS running on Microsoft Windows:

---

**Note.** For PeopleSoft PeopleTools 8.49, *mpwebappdeploy* has been renamed *PsMpWebAppDeployInstall*.

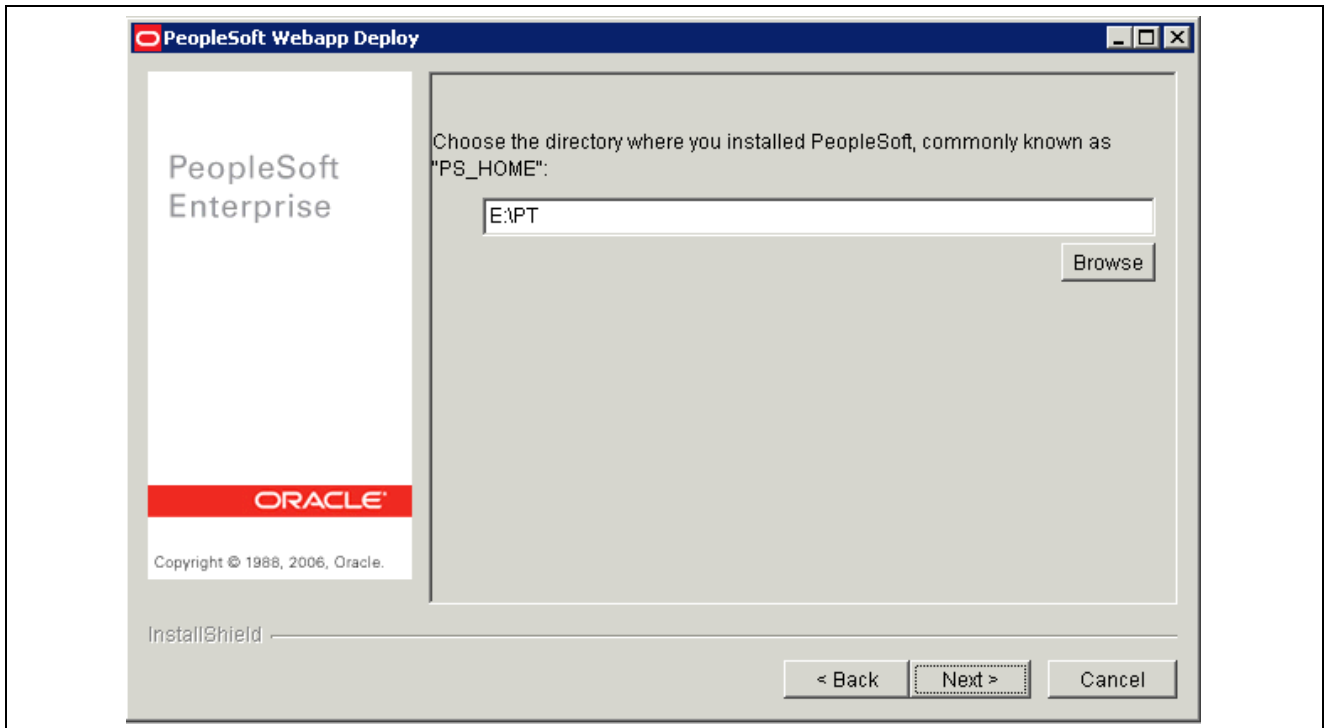
---

1. Go to *PS\_HOME\setup\PsMpWebAppDeployInstall* and run *setup.exe*.
2. On the PeopleSoft Webapp Deploy welcome page, click Next.



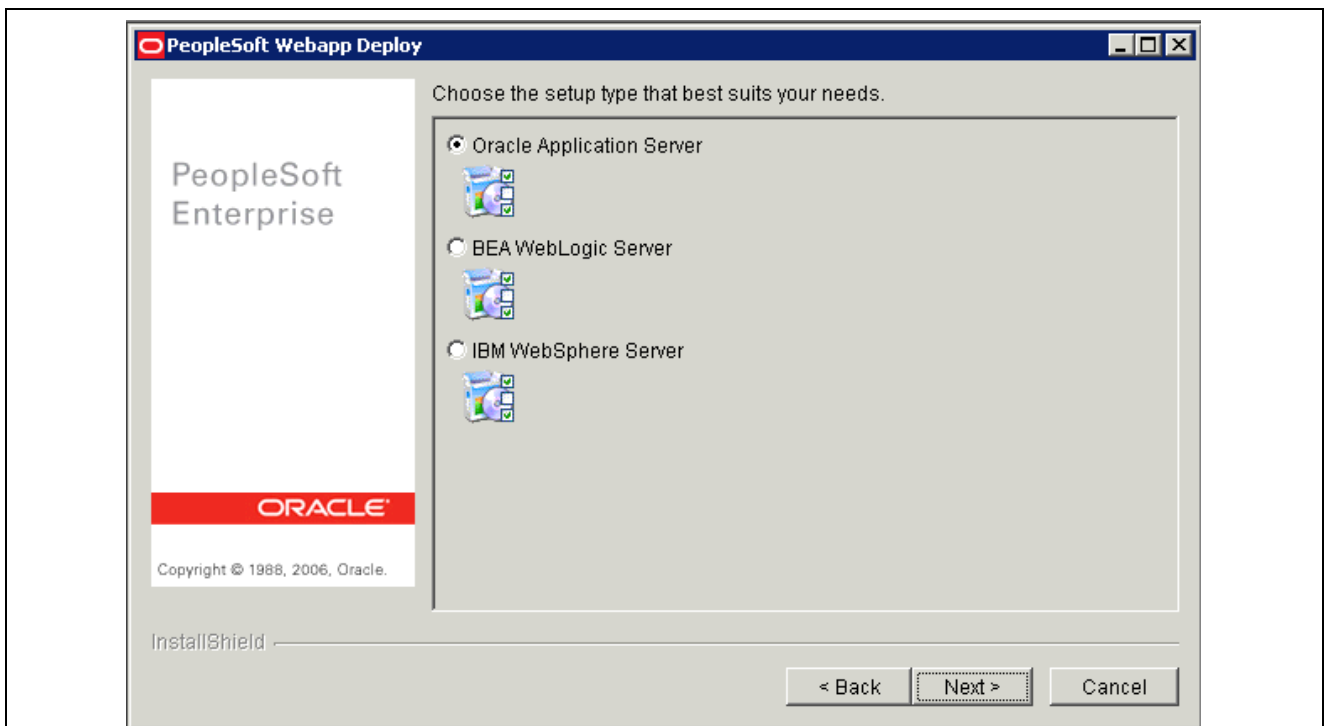
PeopleSoft Webapp Deploy: Welcome page

3. Enter the *PS\_HOME* directory and click Next.



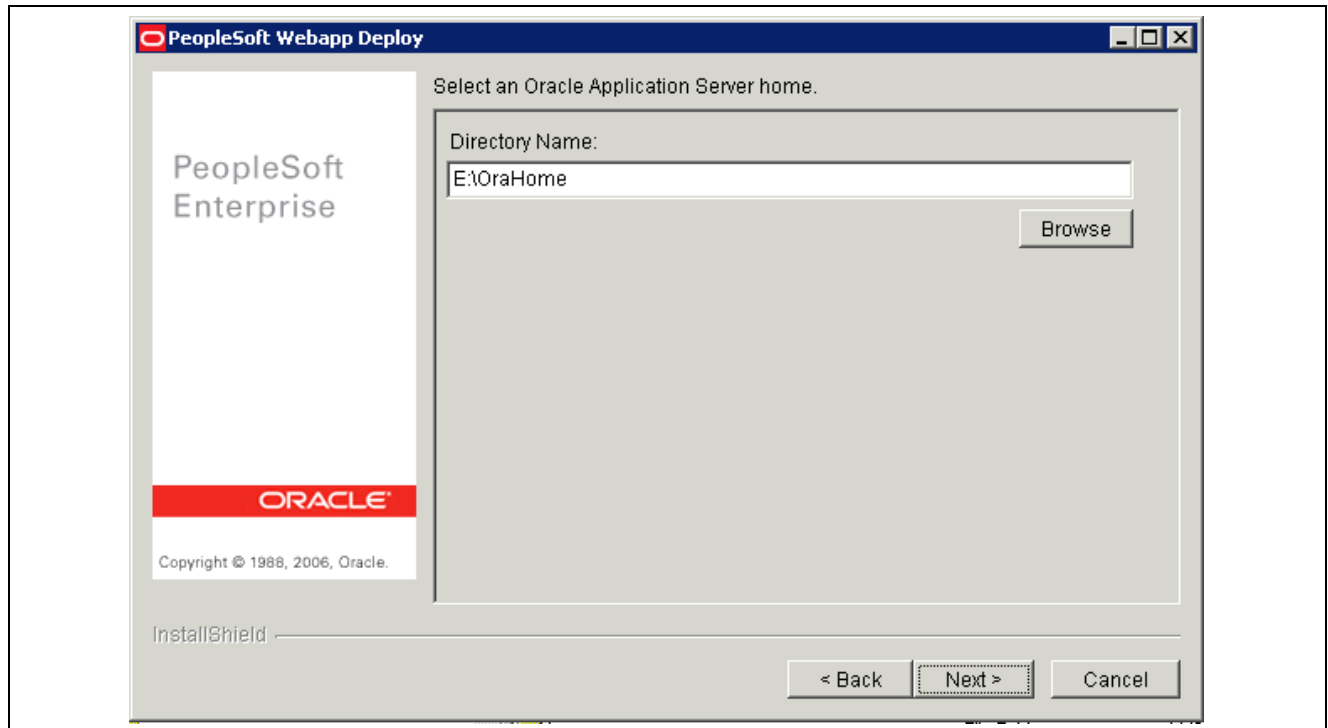
PeopleSoft Webapp Deploy: PeopleSoft PeopleTools home directory selection page

4. Select the Oracle Application Server option and click Next.



PeopleSoft Webapp Deploy: Web server selection page

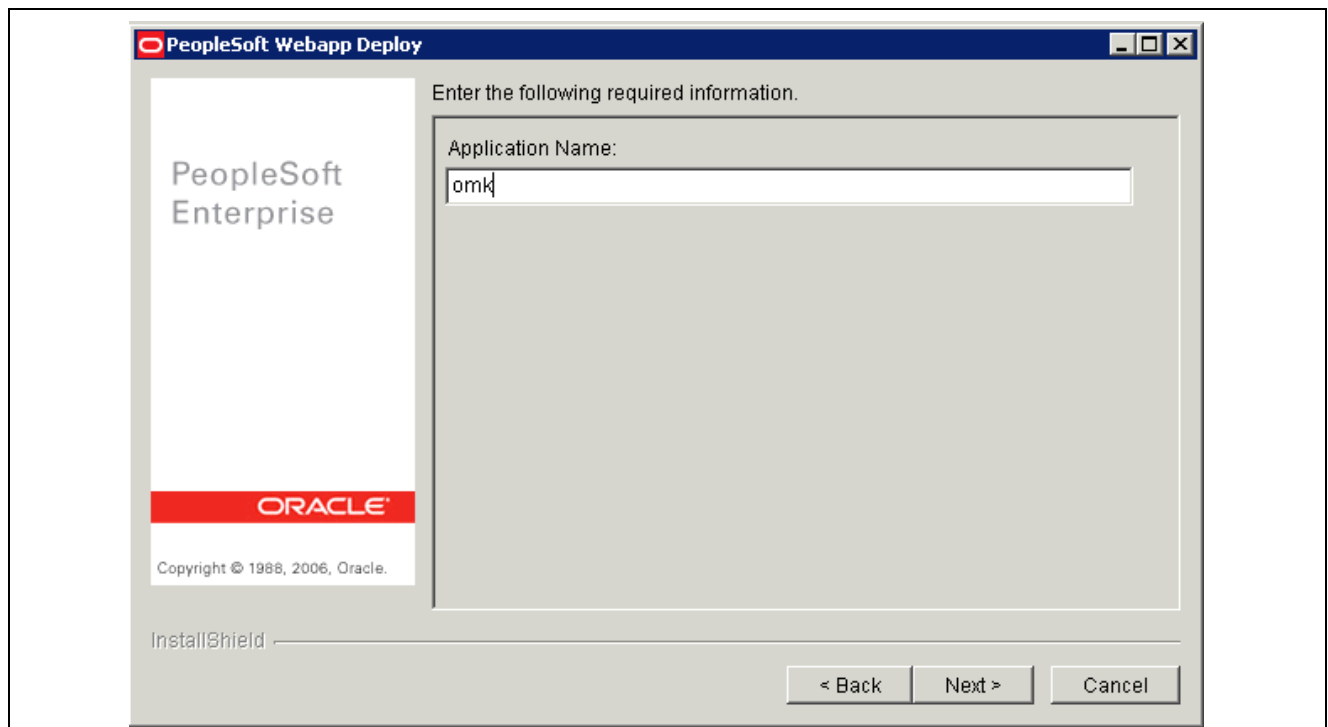
5. Enter the OAS home directory (for example, *c:\OraHome*) and click Next.



PeopleSoft Webapp Deploy: OAS home directory selection page

6. Enter the new application name (for example, *omk*) and click Next.

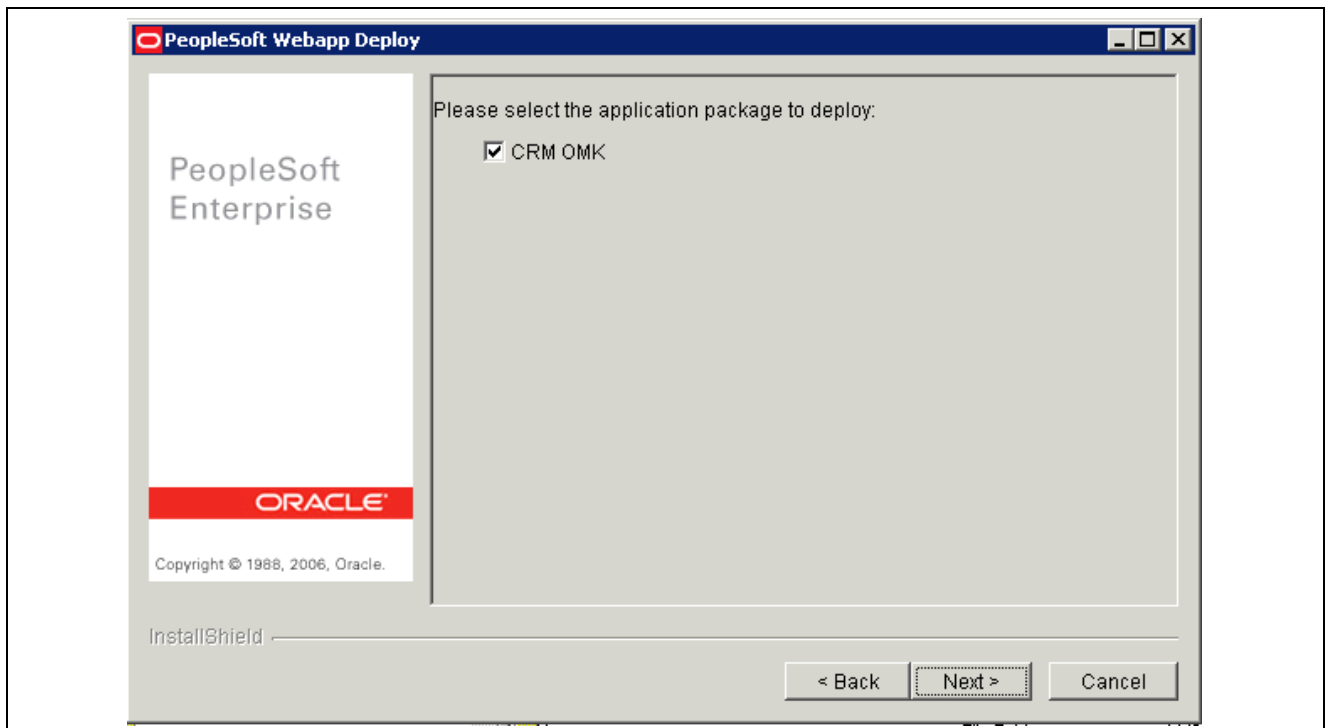
**Note.** Do not use the same name that you used for the PeopleSoft web server application.



PeopleSoft Webapp Deploy: Application name selection page

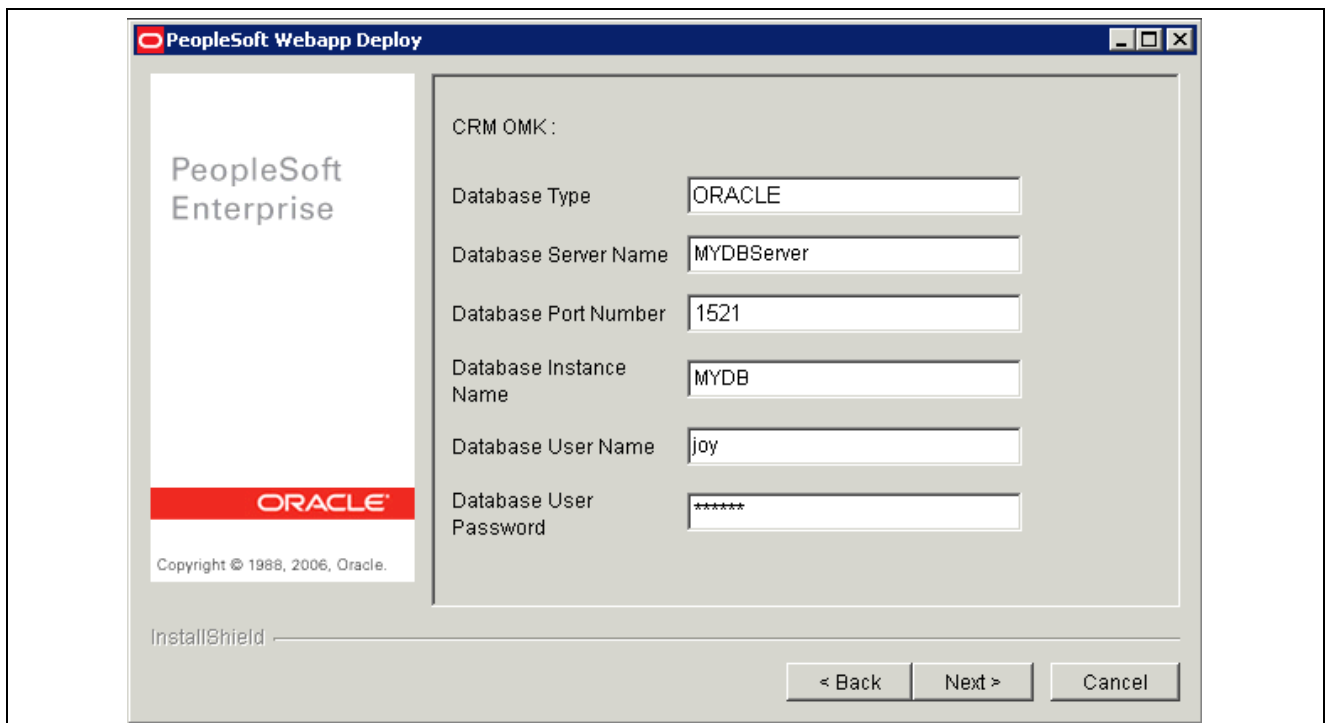
7. Select the CRM OMK check box as the application package to deploy and click Next.





PeopleSoft Webapp Deploy: Application package selection page

8. Complete the CRM database information page with the following information:

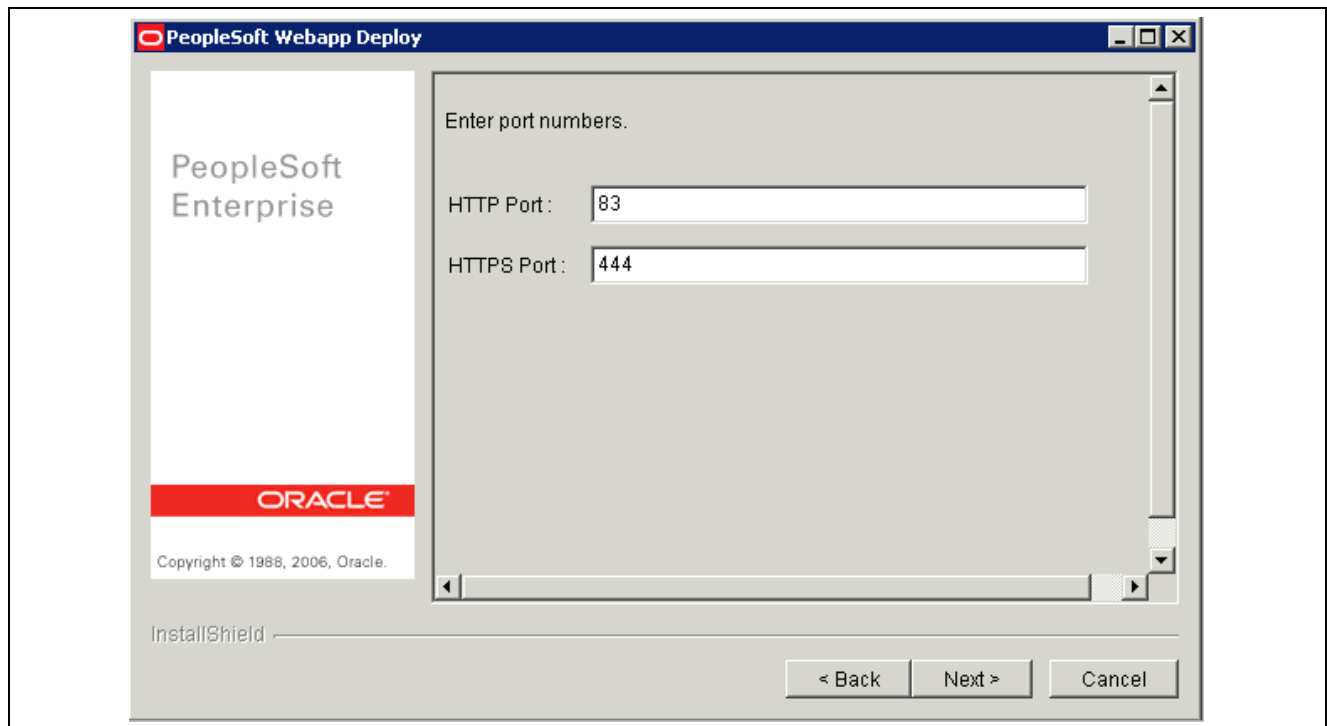


PeopleSoft Webapp Deploy: CRM database information page

- In the Database Type field, select *ORACLE*, *MSSQL*, or *DB2UDB*.
- In the Database Server Name field, enter the name of the machine that is hosting the database.

- The Database Port Number value can differ depending on your database server configuration. Consult your database administrator to determine the correct value for your configuration.
- In the Database Instance Name field, enter the name of the database.
- In the Database User Name field, enter the name of the database user.
- In the Database User Password field, enter the password of the database user.
- Click Next.

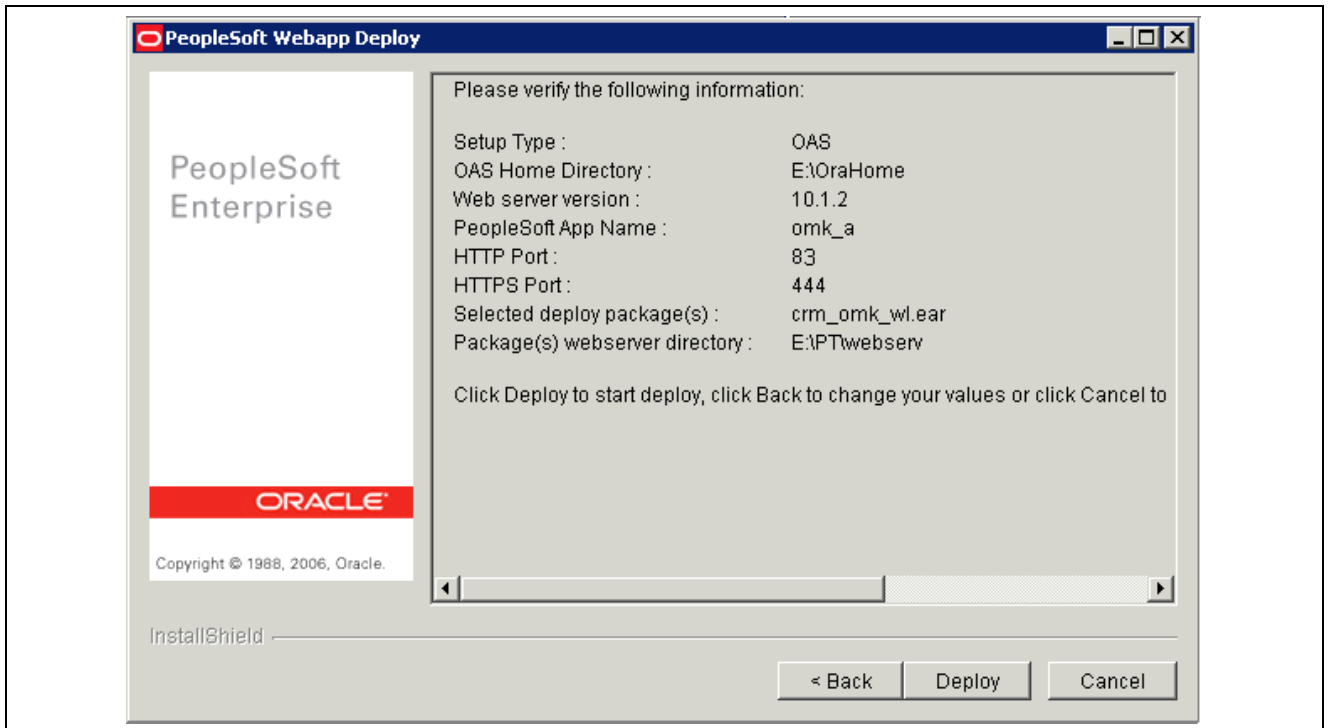
9. Enter the DES HTTP and HTTPS port numbers and click Next.



PeopleSoft Webapp Deploy: DES HTTP/HTTPS port selection page

10. On the summary page, verify that the information is correct.

If it is not correct, click Back and make the necessary corrections



PeopleSoft Webapp Deploy: Summary page

11. Click Deploy to start the installation.

---

**Note.** This process may take up to five minutes. If it does not complete in five minutes, check the DES0\_stderr.log file in the DES installation directory for errors or information. An example of this log file is: <OraHome>\j2ee\omk\applications\omk\DES\DES0\_stderr.log

---

12. Click Finish to exit the installation.

---

**Note.** Restart the OAS after the Dialog Execution Server installation completes, to ensure that OAS initializes all parameters.

---

## Task 3-7-2: Installing the DES on OAS for UNIX

To install the DES application on the OAS running on UNIX:

1. Go to *PS\_HOME*/setup/PsMpWebAppDeployInstall and run the appropriate setup command with these additional parameters:

- `$setup.aix -is:javaconsole -console`
- `$setup.solaris -is:javaconsole -console`

2. Enter *I* to continue.
3. Select the directory where you installed the PeopleSoft application, usually *PS\_HOME*, as follows:

Please specify a directory name or press Enter [/ds1/ps\_home/].

4. Enter *I* to continue.
5. Enter *I* to select the Oracle Application server:

[X] 1 - Oracle Application Server

```
[ ] 2 - BEA WebLogic Server
[ ] 3 - IBM WebSphere Server
```

6. Enter *0* to finish.
7. Enter *1* to continue.
8. Select an Oracle Application Server home.

For example:

```
Directory Name: [/opt/OraHome_1] /ds1/Orahome
```

9. Enter the application name.

For example:

```
Application Name: [PSWebApp] omk
```

10. Enter *1* to continue.
11. Enter *1* to select CRM OMK for the application package to deploy:

```
[X] 1 - CRM OMK
```

12. Enter *0* to finish.
13. Enter *1* to continue.
14. Specify the CRM database information.

For example:

```
CRM OMK :
Database Type: [MSSQL] MSSQL (or ORACLE, DB2UDB)
Database Server Name: [ ] dbServername
Database Port Number: [0] dbport (or 1433 for MSSQL)
Database Instance Name: [ ] dbName
Database User Name: [Admin] userId
Database User Password: [ ] dbpassword
```

15. Enter *1* to continue.
16. Enter the HTTP and HTTPS port numbers for the DES server.

---

**Important!** The HTTP and HTTPS port numbers must be different from your PeopleSoft Pure Internet Architecture port number.

---

For example:

```
HTTP Port: [80] 82
HTTPS Port: [443] 444
```

17. Verify the information that you entered.

For example:

```
Setup Type: OAS
OAS Home Directory: /ds1/Orahome
Web server version: 10.1.2
```

```

PeopleSoft App Name: omk
HTTP Port: 82
HTTPS Port: 444
Selected deploy package(s):crm_omk_wl.ear

```

18. Enter *1* to deploy, or enter *2* to change your values. When you are finished, enter *1* to deploy.

19. Enter *1* to continue.

```

Deploying PeopleSoft Application : CRM OMK ...
0 % complete
20 % complete
sReqFileName= required.jar
Buildfile: /var/tmp/deployOAS.xml
oracle-env-check:
ps-env-check:
webappdeploy-component-name-check:
webappdeploy-env-check:
webappdeploy-component-properties:
    [echo] -----> PeopleTools Home           : /dsl/ps_home
    [echo] -----> Oracle Home                 : /dsl/Orahome
    [echo] -----> WebAppDeploy Component Name : omk
webappdeploy-component-deploy:
    [echo] -----> Starting WebAppDeploy Component Deployment
    [echo] -----> Restarting OAS Component
    [echo]           Executing: opmnctl restartproc ias-component=dcm-daemon
    [echo] -----> Creating OC4J Component omk
    [echo]           Executing: dcmctl createComponent -ct oc4j -co omk
    [echo] -----> Deploying /dsl/ps_home/setup/PsMpWebAppDeployInstall⇒
/archives/crm_omk_wl.ear
    [echo] -----> Deploying omk to OC4J Component omk
    [echo]           Executing: dcmctl deployApplication -f /dsl/ps_home/setup/Ps⇒
MpWebAppDeployInstall/archives/crm_omk_wl.ear -co omk -a omk
    [unjar] Expanding: /dsl/ps_home/setup/PsMpWebAppDeployInstall/archives⇒
/required.jar into /dsl/Orahome/j2ee/omk/applications/omk
    [echo] -----> Starting OC4J Component omk
    [echo]           Executing: opmnctl startproc ias-component=OC4J process-type⇒
⇒
omk
    [echo] -----> Restarting OAS Component
    [echo]           Executing: opmnctl restartproc ias-component=HTTP_Server
    [echo] -----> Cleaning up in single component deployment cleanUpUnix⇒
single:
...
Total time: 1 minute 4 seconds
100 % complete
Deploy Completed. Click next to finish the install.
The InstallShield Wizard has successfully installed PeopleSoft Webapp Deploy
Tool. Choose Finish to exit the wizard.

```

20. Enter *3* to finish.

**Note.** Restart the OAS after the Dialog Execution Server installation completes, to ensure that OAS initializes all parameters.

## Task 3-7-3: Starting the DES on OAS

After the DES application installs it starts automatically. However, because you must install the JDBC driver manually for the DES to function properly, you must restart the DES application following the driver installation.

To start the DES application on the OAS, do one of the following:

- Restart all applications on the OAS.

To restart all applications, enter the following in the Command Window:

```
%OraHome%\opmn\bin\opmnctl.exe startall
```

- Start the DES application directly.

To start the DES application directly:

- In the OAS Administration Console, select the Home tab.
- Select the check box next to the name of the application that you want to start (for example, *omk*).
- Click the Start button.

**ORACLE Enterprise Manager 10g**  
Application Server Control

Application Server: **ias\_admin.anntdv03.dsi-fw.peoplesoft.com**

Home | J2EE Applications | Ports | Infrastructure | Backup/Recovery

Page Refreshed Mar 29, 2006 12:10:08 PM

**General**  
Status: **Up**  
Host: **anntdv03.dsi-fw.peoplesoft.com**  
Version: **10.1.2.0.2**  
Installation Type: **J2EE and Web Cache**  
Oracle Home: **E:\OraHome**

**CPU Usage**  
Application Server (1%)  
Idle (97%)  
Other (2%)

**Memory Usage**  
Application Server (16% 327MB)  
Free (66% 1,354MB)  
Other (18% 365MB)

**System Components**  
Start | Stop | Restart | Delete OC4J Instance | Enable/Disable Components | Configure Component | Create OC4J Instance

Select Name	Status	Start Time	CPU Usage (%)	Memory Usage (MB)
<input type="checkbox"/> home	↑	Mar 28, 2006 3:57:49 PM	0.02	27.57
<input type="checkbox"/> HTTP_Server	↑	Mar 28, 2006 3:57:49 PM	0.11	52.12
<input checked="" type="checkbox"/> omk	↑	Mar 29, 2006 9:51:09 AM	1.13	90.11
<input type="checkbox"/> Management	↑	Mar 28, 2006 3:55:50 PM	0.00	157.16

**TIP** This table contains only the enabled components of the application server. Only components that have the checkbox enabled can be started or stopped.

OAS Administration Console: Home tab

## Task 3-8: Installing the DES on an IBM WebSphere Server

This section discusses:

- Understanding DES Installation on IBM WebSphere

- Creating a New IBM WebSphere Server
- Creating and Removing Services for MS Windows
- Installing the DES on IBM WebSphere Server on MS Windows
- Installing the DES on an IBM WebSphere for UNIX
- Starting the DES on an IBM WebSphere Server

## Understanding DES Installation on IBM WebSphere

You cannot use an existing PeopleSoft Pure Internet Architecture server on IBM WebSphere for the Dialog Execution Server (DES). Also, you cannot use the same PeopleSoft Pure Internet Architecture HTTP/HTTPS port number for the Dialog Execution Server HTTP/HTTPS port number. You must create a new IBM WebSphere web server and start this server before installing the Dialog Execution Server. This should be done through the IBM WebSphere Administration Console.

---

**Important!** Before you install the Dialog Execution Server (DES) application on an IBM WebSphere server, you must review the task *Modifying the Dialog Execution Server Deployment Descriptor*, to determine if you must manually modify the DES deployment descriptor before proceeding with your DES installation.

---

### Task 3-8-1: Creating a New IBM WebSphere Server

To create a new IBM WebSphere server:

1. Start the IBM WebSphere server1 if it is not already started.
2. Open the IBM WebSphere Administration Console where the IBM WebSphere base is centrally administered:

---

**Note.** You can exit the console by clicking the Exit tab at the top of the console window.

---

- Enter `http://localhost:9090/admin` in a browser (where 9090 is the default administration port).
- Without co-existence, 9090 is the default administration client port.

In the case of co-existence, another port is selected and will appear here.

- If IBM WebSphere installs silently or with modified ports, the First Steps link to the Administration Console will not work.

You can access the administration console through the Admin Console port that is specified as a modified port, or through the silent install ports 19090 or 19091.

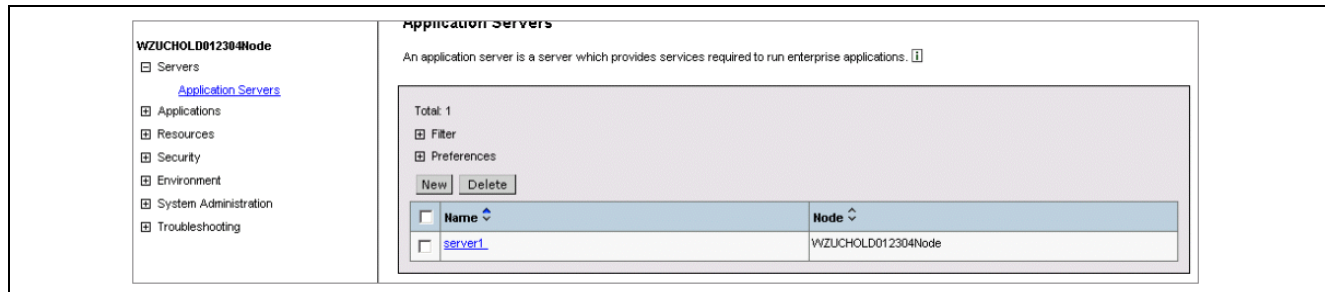
- On IBM AIX systems, the AIX Web-Based System Manager (WSM) may be running on port 9090.

WSM will prevent the IBM WebSphere Administration Console from running on port 9090. To avoid this conflict, change the IBM WebSphere Administration Console port.

3. Enter the user ID and click OK.

By default, the console displays no security, so click OK to log in.

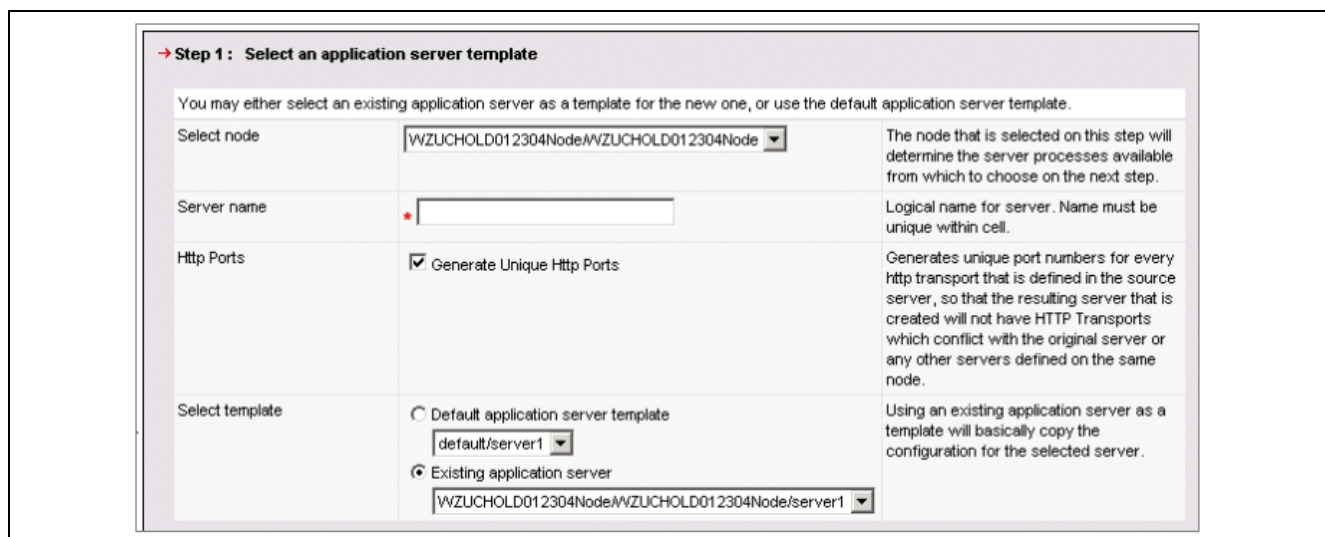
4. Select Application Servers and click New.



Application Servers page

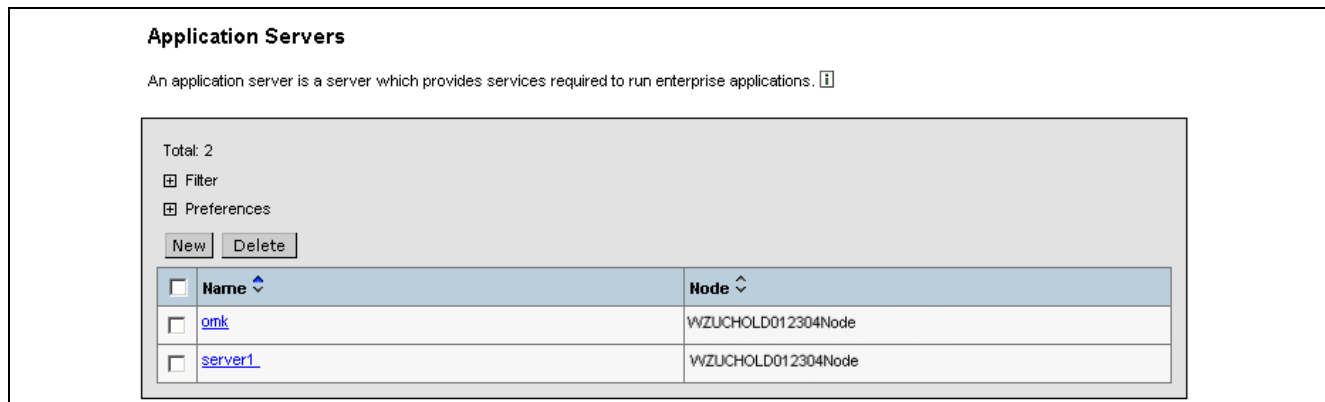
5. Define a new server name (for example, *omk*).
6. Select an existing application server for the template.

Use server1, created earlier, as the default.



Application Server Template

7. Click Next.
8. Click Finish.
9. Click Save.
10. Expand the Servers section and click Application Servers to validate the creation of the second server.



Application Servers page



11. Select the New Server and Web Container links to verify the ports that were assigned to the new server.

Additional Properties	
<a href="#">Transaction Service</a>	Specify settings for the Transaction Service, as well as manage active transaction locks.
<a href="#">Web Container</a>	Specify thread pool and dynamic cache settings for the container. Also, specify session manager settings such as persistence and tuning parameters, and HTTP transport settings.
<a href="#">EJB Container</a>	Specify cache and datasource information for the container.
<a href="#">Dynamic Cache Service</a>	Specify settings for the Dynamic Cache service of this server.
<a href="#">Logging and Tracing</a>	Specify Logging and Trace settings for this server.
<a href="#">Message Listener Service</a>	Configuration for the Message Listener Service. This service provides the Message Driven Bean (MDB) listening process, whereby MDBs are deployed against ListenerPorts that define the JMS destination to listen upon. These Listener Ports are defined within this service along with settings for its Thread Pool.

Additional Properties page: Web Container link

12. Select the HTTP transports link.

Additional Properties	
<a href="#">Thread Pool</a>	The thread pool settings for the Web container
<a href="#">Session Management</a>	Configure the session manager associated with this webcontainer
<a href="#">HTTP transports</a>	Configure the HTTP transports associated with this webcontainer
<a href="#">Custom Properties</a>	Additional custom properties for this runtime component. Some components may make use of custom configuration properties which can be defined here.

Additional Properties page: HTTP transports link

HTTP Transport		
An HTTP transport for communicating requests to the web container. ⓘ		
Total: 4		
<input type="checkbox"/> Filter <input type="checkbox"/> Preferences		
<input type="button" value="New"/> <input type="button" value="Delete"/>		
<input type="checkbox"/> Host ↕	Port	SSL Enabled
<input type="checkbox"/> *	9081	false
<input type="checkbox"/> *	9091	false
<input type="checkbox"/> *	9444	true
<input type="checkbox"/> *	9044	true

HTTP Transport page

13. Start the new server by entering the following command in the command window:

```
%WAS_HOME%\bin\startServer.bat omk
```

## Task 3-8-2: Creating and Removing Services for MS Windows

To create and remove services for a Microsoft Windows installation:

1. Open a command window and go to the %WAS\_HOME%\bin, where WAS\_HOME is the IBM WebSphere installation directory.
2. Enter the following command:

```
wasservice -add EPDEMO -serverName EPDEMO
```

```

C:\psbase\WebSphere51\AppServer\bin>wasservice -add EPDEMO -serverName EPDEMO
Adding Service: EPDEMO
Config Root: C:\psbase\WebSphere51\AppServer\config
Server Name: EPDEMO
Was Home: C:\psbase\WebSphere51\AppServer\
Start Args:
Restart: 1
IBM WebSphere Application Server V5 - EPDEMO service successfully added.

```

Microsoft Windows command window

3. Go to Services.

---

**Note.** On Microsoft Windows 2005, select Start, Programs, Control Panel, Administrative Tools, Services-IBM WebSphere Application Server V5 - EPDEMO.

---

4. Change the login account for the service to the local account that you created.
5. Start the service as necessary for DES installation.

### Task 3-8-3: Installing the DES on IBM WebSphere Server on MS Windows

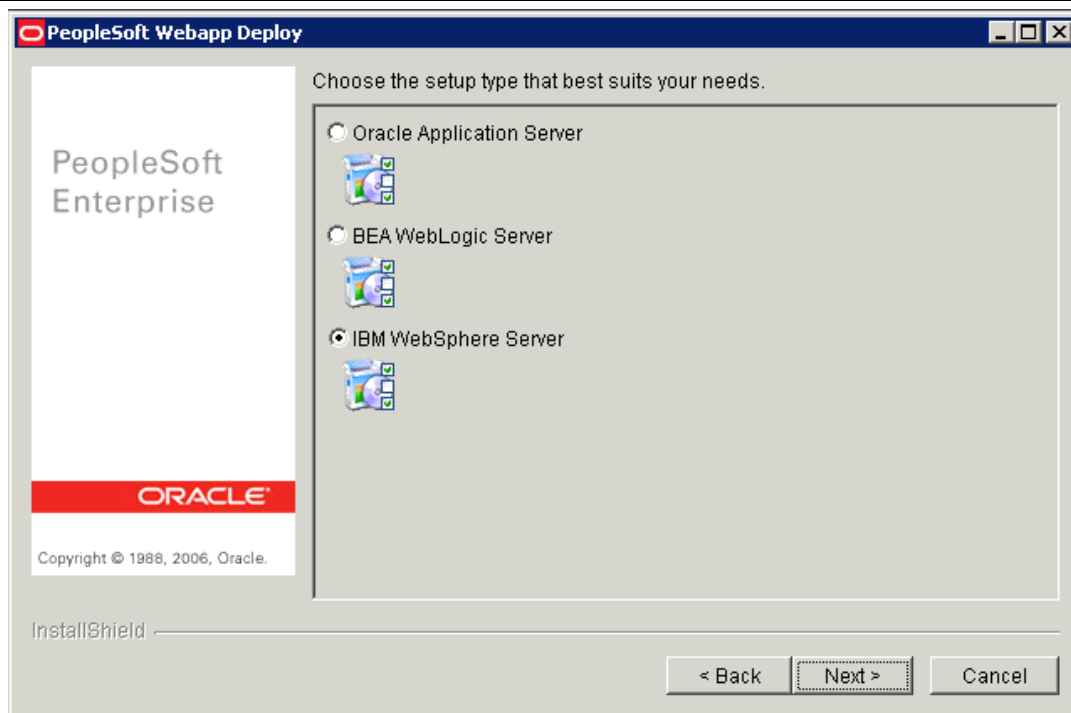
To install the DES application on an IBM WebSphere server running on Microsoft Windows:

---

**Note.** A similar page appears in the step “Installing the DES on OAS for Microsoft Windows.”

---

1. Go to *PS\_HOME*\setup\PsMpWebAppDeployInstall and run setup.exe.
2. On the PeopleSoft Webapp Deploy welcome page, click Next.
3. On the PeopleSoft PeopleTools directory selection page, enter the *PS\_HOME* directory and click Next.
4. On the web server selection page, select the IBM WebSphere Server option and click Next.



PeopleSoft Webapp Deploy: Web server selection page

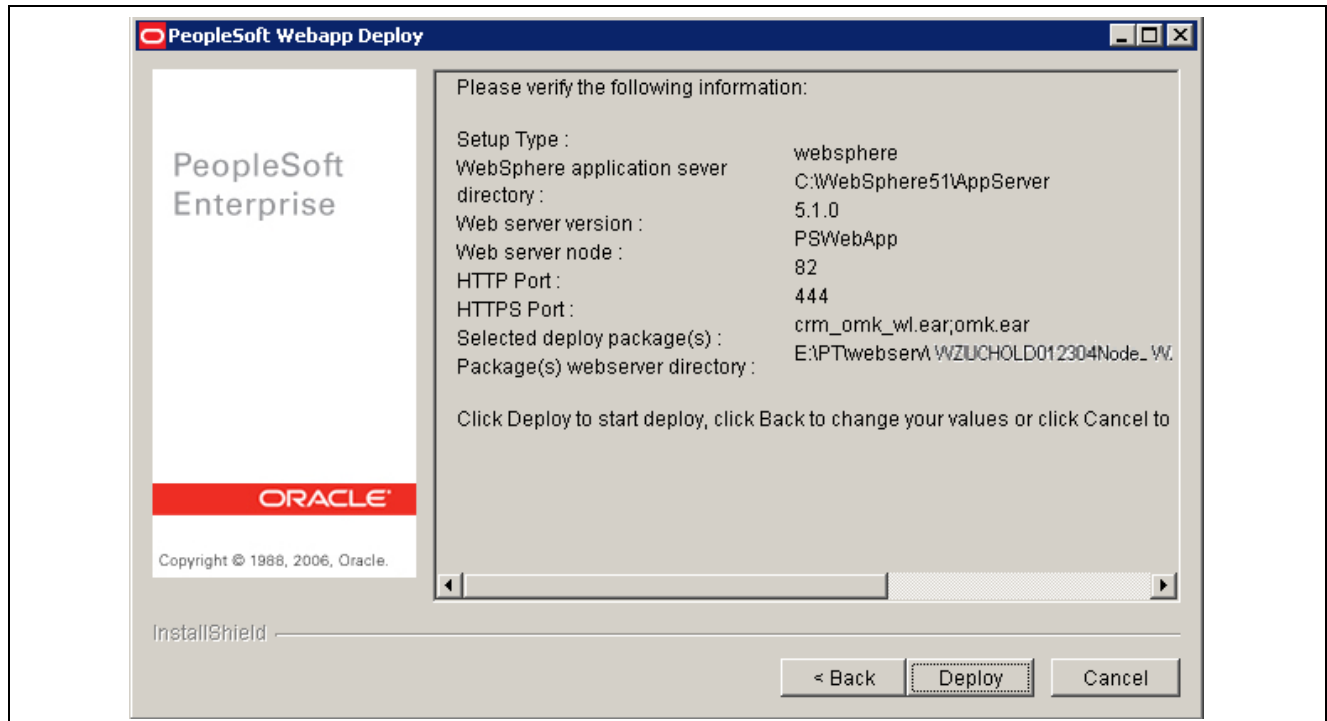
5. Complete the IBM WebSphere application server specifications page, as follows:

The screenshot shows the 'PeopleSoft Webapp Deploy' window. On the left is a sidebar with the 'PeopleSoft Enterprise' logo and the 'ORACLE' logo, with copyright text 'Copyright © 1988, 2006, Oracle.' and 'InstallShield' at the bottom. The main area is titled 'Select the WebSphere Application Server directory:' and contains a 'Directory Name:' text box with the value 'C:\WebSphere51\AppServer' and a 'Browse' button. Below this is the section 'Select a WebSphere server to install the application:' with three dropdown menus: 'Cell Name:' (value: 'WZUCHOLD012304Node'), 'Node Name:' (value: 'WZUCHOLD012304Node'), and 'Server name:' (value: 'omk'). At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

PeopleSoft Webapp Deploy: IBM WebSphere application server specifications page

- In the Directory Name field, enter the IBM WebSphere Application Server directory *C:\WebSphere51\AppServer*.
  - Enter the cell name, node name, and server name for the IBM WebSphere server.
  - Click Next.
6. On the application name option page, enter the application name and click Next.
  7. On the application package option page, select the CRM OMK check box as the application package to deploy and click Next.
  8. Complete the CRM database information page, as follows:
    - In the Database Type field, select *ORACLE*, *MSSQL*, or *DB2UDB*.
    - In the Database Server Name field, enter the name of the machine that is hosting the database.
    - The Database Port Number value can differ depending on your database server configuration. Consult your database administrator to determine the correct value for your configuration.
    - In the Database Instance Name field, enter the name of the database.
    - In the Database User Name field, enter the name of the database user.
    - In the Database User Password field, enter the password of the database user.
    - Click Next.
  9. On the DES HTTP/HTTPS port option page, enter the DES HTTP and HTTPS port numbers and click Next.
  10. Verify that the information is correct.

If the information is not correct, click Back and make the necessary corrections.



PeopleSoft Webapp Deploy: Summary page

11. Click Deploy to start the installation.
12. Click Finish to exit the installation.

### Task 3-8-4: Installing the DES on an IBM WebSphere for UNIX

To install the DES application on an IBM WebSphere server running on UNIX:

1. Go to *PS\_HOME/setup/PsMpWebAppDeployInstall* and run the appropriate setup command with these additional parameters:
  - `$setup.aix -is:javaconsole -console`
  - `$setup.solaris -is:javaconsole -console`
2. After the following messages appear, enter *1* to continue:

```
InstallShield Wizard
Initializing InstallShield Wizard...
Searching for Java(tm) Virtual Machine.....
Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on
your computer.
Version: 8.48
```

3. Select the directory where you installed PeopleSoft, commonly known as *PS\_HOME* (*/products/WebSphere51/AppServer* in this example), as follows:

```
Specify a directory name or press Enter [/dsl/home/a890u40a] /products/Web
Sphere51/AppServer.
```

4. Enter *I* to continue.
5. Enter *3* to select the IBM WebSphere server:  

```
[ ] 1 - Oracle Application Server
[ ] 2 - BEA WebLogic Server
[X] 3 - IBM WebSphere Server
```
6. Enter *0* to finish.
7. Enter *I* to continue.
8. Accept the default or specify the location of the IBM WebSphere Application Server directory.  
For example:  

```
[ /usr/WebSphere/AppServer ] /products/WebSphere51/AppServer
```
9. Enter *I* to continue.
10. Specify the cell name.  
For example:  

```
[X] 1 - an-ibm01Node
```
11. Enter *0* to finish.
12. Enter *I* to continue.
13. Select the appropriate node name.  
For example:  

```
[X] 1 - an-ibm01Node
```
14. Enter *0* to finish.
15. Enter *I* to continue.
16. Select the appropriate server name.  
For example:  

```
[X] 1 - server1
```
17. Enter *0* to finish.
18. Enter *I* to continue.
19. Select the application name or accept the default.  
For example:  

```
[ PSWebApp ] OMK
```
20. Enter *I* to continue.
21. Enter *I* to select CRM OMK for the application package to deploy:  

```
[X] 1 - CRM OMK
```
22. Enter *0* to finish.
23. Enter *I* to continue.

## 24. Specify the CRM database information.

For example:

```
CRM OMK:
Database Type: [MSSQL] DB2UDB
Database Server Name: [] an-ibm007
Database Port Number: [0] 50004
Database Instance Name: [] a890u40a
Database User Name: [Admin] a890u40a
Database User Password: [] a890u40a
```

25. Enter */* to continue.

## 26. Enter the appropriate HTTP/HTTPS port numbers for the DES server.

For example:

```
HTTP Port: [80] 19850
HTTPS Port: [443]
```

---

**Important!** The HTTP and HTTPS port numbers must be different from your PeopleSoft Pure Internet Architecture port number.

---

27. Enter */* to continue.

## 28. Review and confirm your selections before deploying the DES server.

For example:

```
Setup Type: websphere
WebSphere application sever directory : /products/WebSphere51/AppServer
Web server version: 5.1.0
Web server node : OMK
HTTP Port: 19850
HTTPS Port: 443
Selected deploy package(s): crm_omk_wl.ear
Package(s) webserver directory: /products/WebSphere51/AppServer/webserv/an-
ibm01Node_an-ibm01Node_server1
```

29. Enter */* to deploy.

## Task 3-8-5: Starting the DES on an IBM WebSphere Server

Because you must install the JDBC driver in the upcoming task “Retrieving and Installing JDBC Drivers” to enable the DES to function properly, you must start the DES application following the driver installation.

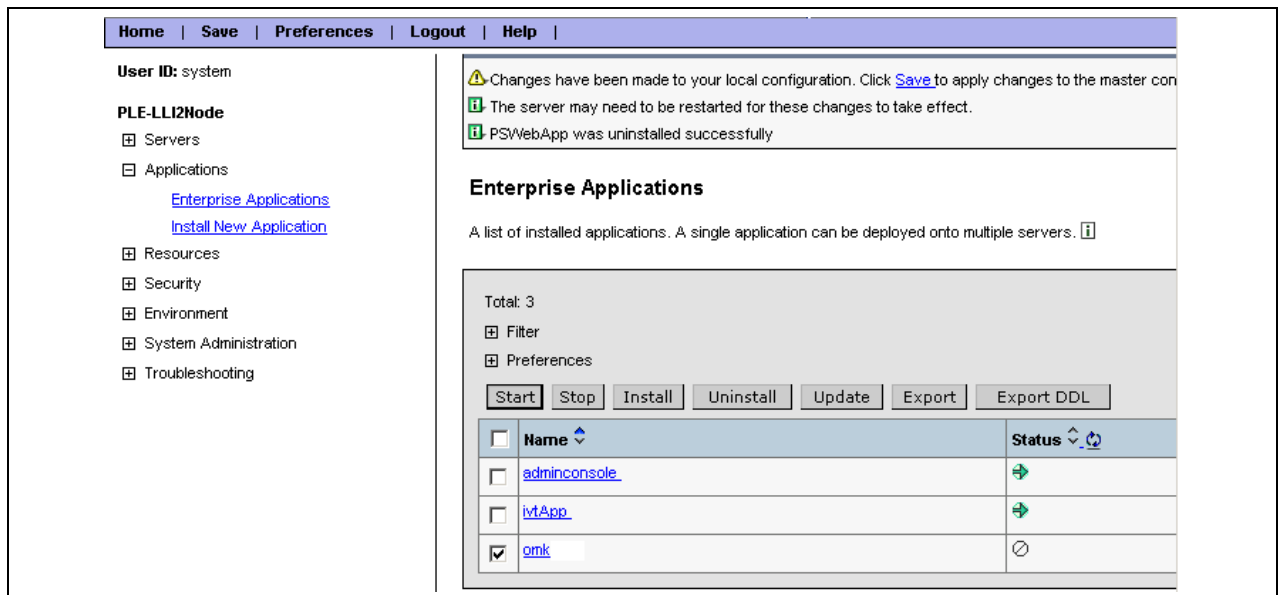
To start the DES application on an IBM WebSphere server, do one of the following:

- Restart the new web server by entering the following command in a command window:

```
%WAS_HOME%\bin\startServer.bat omk
```

- Start the DES application directly, as follows:

- In the IBM WebSphere Administration Console, select Applications, Enterprise Applications.
- Select the check box next to the name of the application that you want to start (for example, *omk*).
- Click the Start button.



IBM WebSphere Administration Console: Enterprise Applications page

## Task 3-9: Installing the DES on a WebLogic Server

This section discusses:

- Understanding DES Installation on a WebLogic Server
- Prerequisites
- Installing the DES on WebLogic on MS Windows
- Installing the DES on BEA WebLogic on UNIX
- Starting the DES on a BEA WebLogic Server
- Modifying the BEA WebLogic File Prior DES Restart

### Understanding DES Installation on a WebLogic Server

You cannot use an existing PeopleSoft Pure Internet Architecture domain on a WebLogic server for the Dialog Execution Server (DES). A new WebLogic domain creates during the DES installation. Additionally, you cannot use the same PeopleSoft Pure Internet Architecture HTTP/HTTPS port number for the DES HTTP/HTTPS port number.

**Important!** Before you install the Dialog Execution Server (DES) application on a WebLogic server, you must refer to the task *Modifying the Dialog Execution Server Deployment Descriptor*, to determine if you must manually modify the DES deployment descriptor before proceeding with your DES installation.

---

**Important!** Using PeopleSoft CRM 9.0 with PeopleSoft PeopleTools 8.48 (or earlier) in conjunction with WebLogic 8.1 will cause a series of errors and the DES will not deploy. Before you restart the DES application with WebLogic 8.1, you must refer to the task *Modifying the BEA WebLogic File Prior DES Restart*, to determine if you must manually modify the weblogic.xml file before restarting the DES.

---

## Prerequisites

Before you install the Dialog Execution Server (DES) application on a WebLogic server, you must:

- Review the task *Modifying the Dialog Execution Server Deployment Descriptor* to determine if you need to manually modify the DES deployment descriptor before proceeding.
- Review the task *Modifying the BEA WebLogic File Prior DES Restart* to determine if you need to manually modify the weblogic.xml file before you restart the DES.
- Shut down any web servers that are running to avoid corruption.

## Task 3-9-1: Installing the DES on WebLogic on MS Windows

To install the DES application on a WebLogic server running on Microsoft Windows:

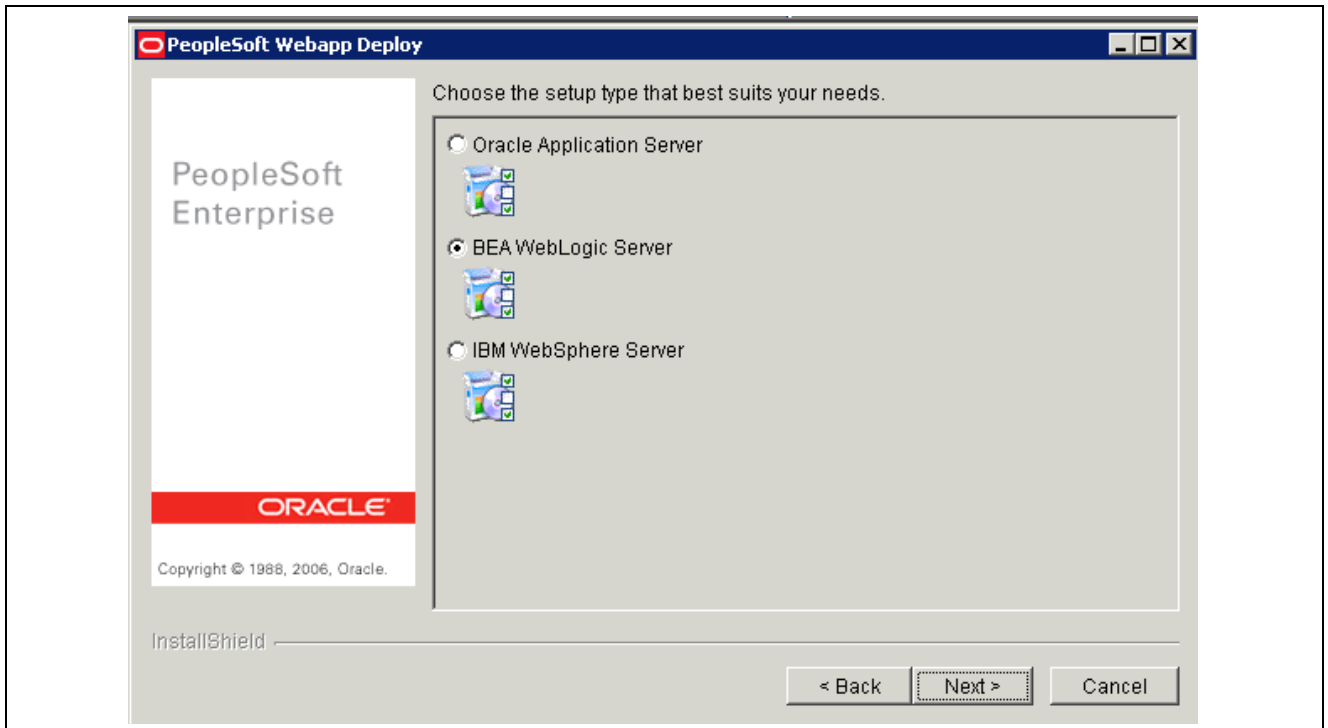
---

**Note.** A similar page appears in the step “Installing the DES on OAS on Microsoft Windows.”

---

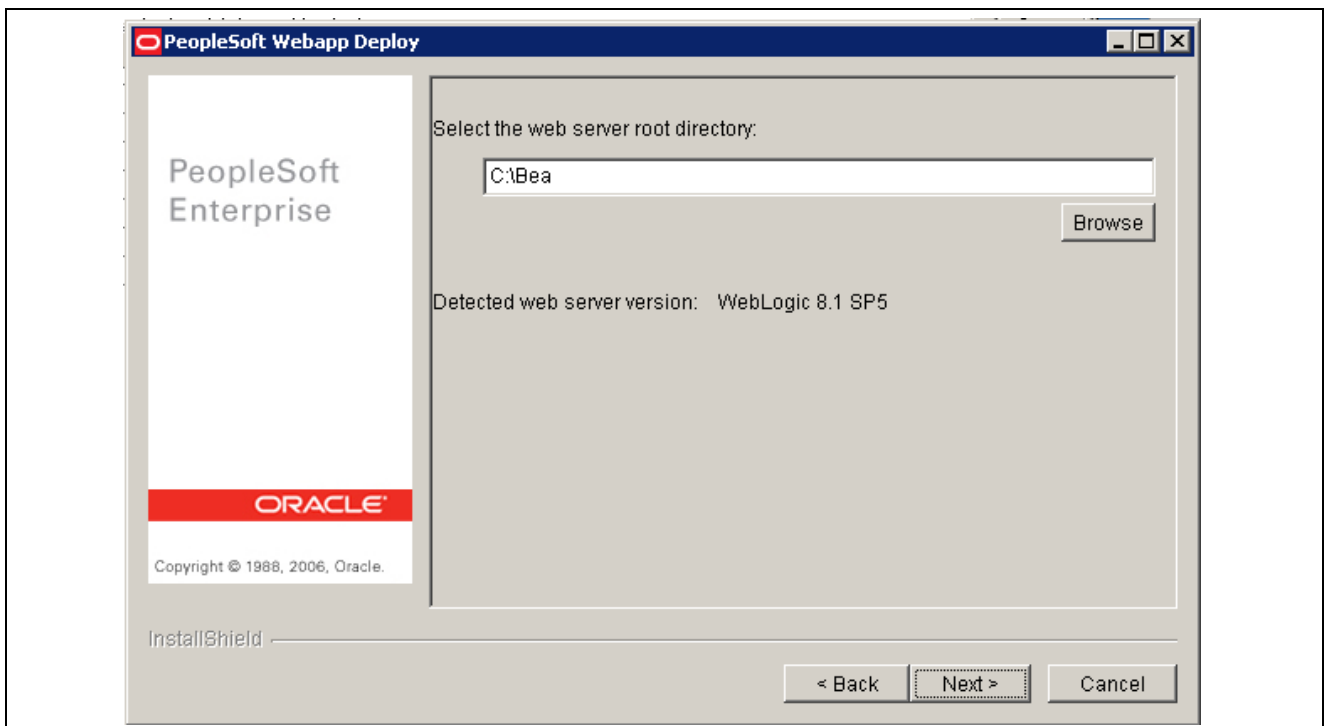
1. Go to *PS\_HOME*\setup\PsMpWebAppDeployInstall and run setup.exe.
2. On the Welcome page, click Next.
3. On the PeopleSoft PeopleTools home directory selection page, enter the *PS\_HOME* directory and click Next.
4. On the web server selection page, select the BEA WebLogic Server option and click Next.





PeopleSoft Webapp Deploy: Web server selection page

5. Enter the WebLogic server root directory (for example, *c:\bea*) and click Next.



PeopleSoft Webapp Deploy: WebLogic server root directory page

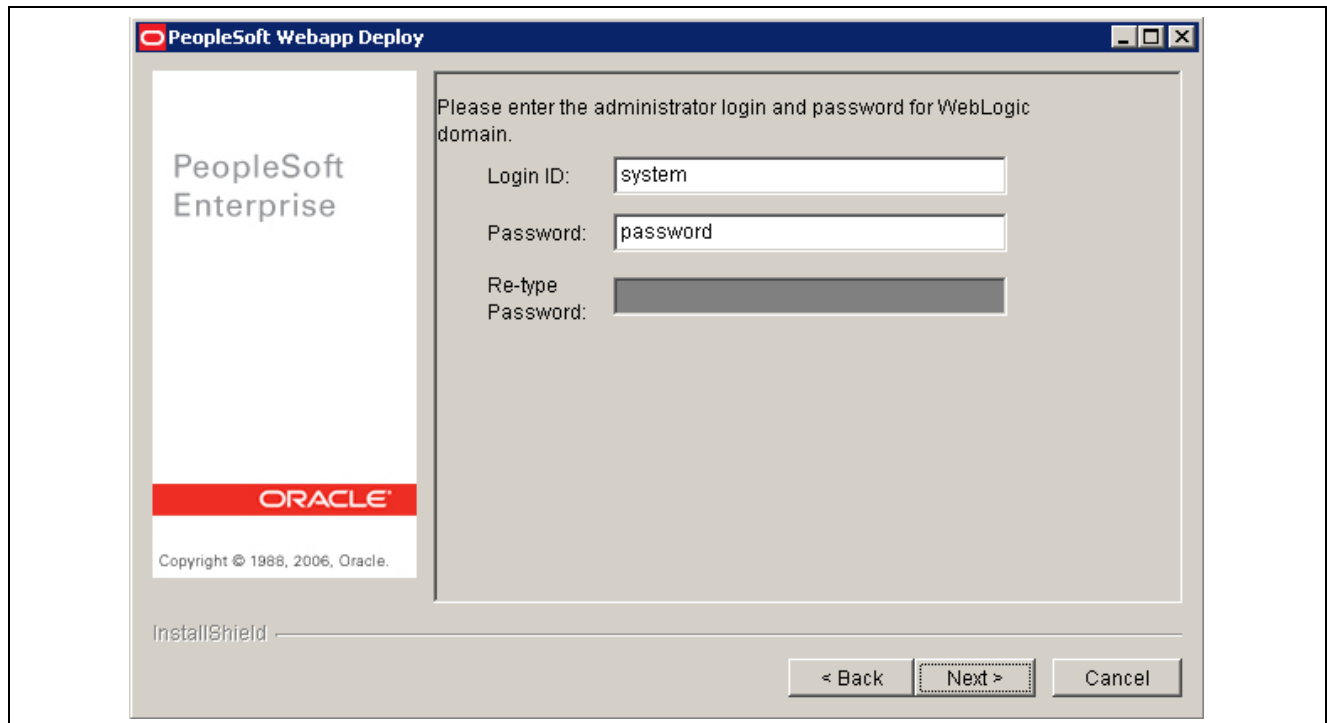
6. On the Application name selection page, enter your new domain name (for example, *omk*) and click Next.

---

**Important!** Do not use the same names that you used for PeopleSoft web server domains.

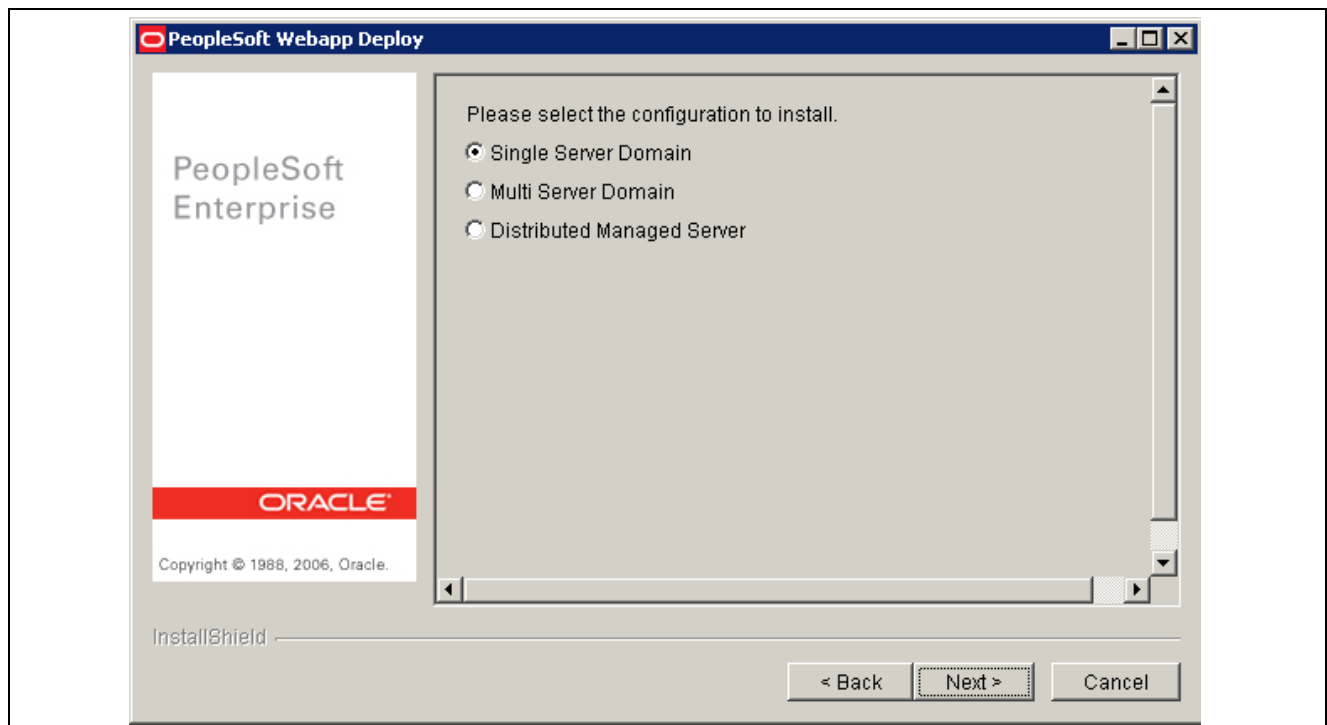
---

7. On the BEA WebLogic login information page, enter the login ID and password for the BEA WebLogic domain and click Next.



PeopleSoft Webapp Deploy: BEA WebLogic login information page

8. On the Application package selection page, select *CRM OMK* as the application package to deploy and click Next.
9. On the installation configuration page, select the Single Server Domain option and click Next.



PeopleSoft Webapp Deploy: Installation configuration page

---

**Note.** This documentation does not include information about configuring a clustered server.

---

10. Complete the PeopleSoft CRM database information page, as follows:
  - In the Database Type field, select *ORACLE*, *MSSQL*, or *DB2UDB*.
  - In the Database Server Name field, enter the name of the machine that is hosting the database.
  - The Database Port Number value can differ depending on your database server configuration. Consult your database administrator to determine the correct value for your configuration.
  - In the Database Instance Name field, enter the name of the database.
  - In the Database User Name field, enter the name of the database user.
  - In the Database User Password field, enter the password of the database user.
  - Click Next.
11. On the DES HTTP/HTTPS port selection page, enter the DES HTTP and HTTPS port numbers and click Next.

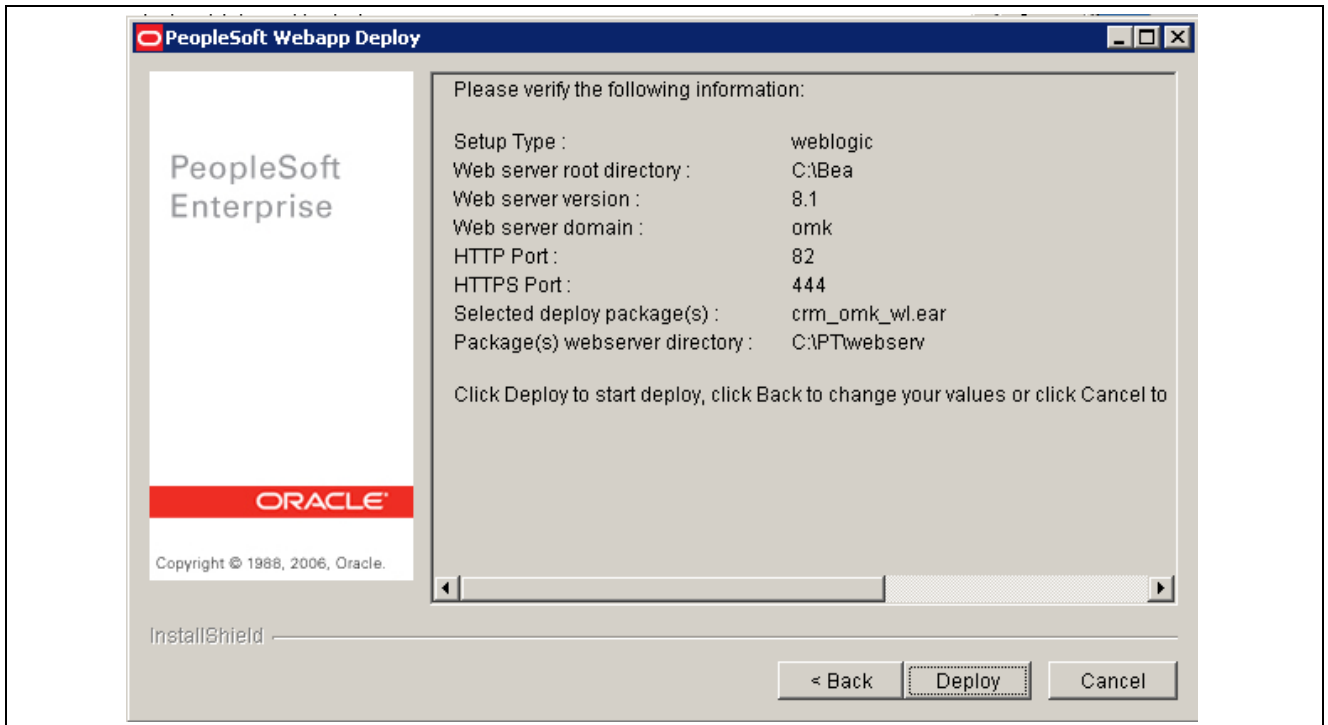
---

**Important!** This port number must be different from your PeopleSoft Pure Internet Architecture port number.

---

The Installation Summary page appears.

12. Verify that the information is correct.
- If the information is not correct, click Back and correct the issue.



Peoplesoft Webapp Deploy: Summary page

13. Click Deploy to start the installation.

---

**Note.** This process may take up to five minutes. If it does not complete within five minutes, check the `DES0_stderr.log` file in the DES installation directory for errors or information (for example, `PS_HOME\webserv\omk\DES\DES0_stderr.log`).

---

14. Click Finish to exit the installation.

## Task 3-9-2: Installing the DES on BEA WebLogic on UNIX

To install the DES application on a BEA WebLogic server running on UNIX:

1. Shut down any BEA WebLogic web server that is running.
2. Go to `PS_HOME/setup/PsMpWebAppDeployInstall` and run the appropriate setup command with these additional parameters:
  - `$setup.aix -is:javaconsole -console`
  - `$setup.solaris -is:javaconsole -console`
3. After the following messages appear, enter `/` to continue:

```
InstallShield Wizard
Initializing InstallShield Wizard...
Searching for Java(tm) Virtual Machine.....
Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on
your computer.
Version: 8.48
```

---

**Note.** If you are installing on a BEA WebLogic server, make sure you shut down any running web servers to avoid corrupting those web servers.

---

4. Select the directory where you installed the PeopleSoft application, commonly known as `PS_HOME`, as follows:

```
Please specify a directory name or press Enter [/ds1/home/a890u40a] e.g. /ds2
/home/upgtest2/c890t208
```

5. Enter `/` to continue.
6. Enter `/` to select the BEA WebLogic server:

```
[X] 1 - BEA WebLogic Server
[ ] 2 - IBM WebSphere Server
```

7. Enter `0` to finish.
8. Enter `/` to continue.
9. Specify the web server root directory information.

For example:

```
Directory name: [/opt/bea] /ds2/home/upgtest2/bea81
Detected web server version: Weblogic 8.1 SP2
```

10. Enter `/` to continue.

11. Enter the domain name or enter *0* to select the default *[PSWebApp]*.
12. Enter *1* to continue.
13. Specify the login ID and password, or press ENTER to accept the default:

```
Login ID: [system]
Password: [password]
Re-type password: [password]
```

14. Enter *1* to continue.
15. Enter *1* to select CRM OMK for the application package to deploy:

```
[X] 1 - CRM OMK
```

16. Enter *0* to indicate that you are finished with this step.
17. Enter *1* to select Single Server Domain for the configuration to install:

```
[X] 1 - Single Server Domain
[ ] 2 - Multi-Server Domain
[ ] 3 - Distributed Managed Server
```

18. Enter *1* to continue.
19. Specify the CRM database information.

For example:

```
CRM OMK:
Database Type: [MSSQL] ORACLE
Database Server Name: [ ] an-ibm007
Database Port Number: [0] 1521
Database Instance Name: [ ] C890T208
Database User Name: [Admin] SYSADM
Database User Password: [ ] SYSADM
```

20. Enter *1* to continue.
21. Enter the appropriate HTTP and HTTPS port numbers for the DES server.

---

**Important!** The HTTP and HTTPS port numbers must be different from your PeopleSoft Pure Internet Architecture port number.

---

For example:

```
HTTP Port: [80] 8007
HTTPS Port: [443]
```

22. Enter *1* to continue.
23. Review and confirm your selections before deploying the DES server.

For example:

```
Set up Type: Weblogic
```

```

Web server root directory: /ds2/home/upgtest2/bea81
Web server version: 8.1
Web server domain: PSWebApp
HTTP Port: 8007
HTTPS Port: 443
Selected deploy package(s):
Package(s) web server directory: /ds2/home/upgtest2/c890t208/webserv

```

24. Enter *I* to deploy.

### Task 3-9-3: Starting the DES on a BEA WebLogic Server

Because you must install the JDBC driver in the upcoming task “Retrieving and Installing JDBC Drivers” to enable the DES to function properly, you must start the DES application following the driver installation.

To start the DES application on a BEA WebLogic server, enter the following command in a command window:

```
%PS_HOME%\webserv\<domain name>\bin\startPSWEBAPPS.cmd
```

---

**Warning!** If you are using PeopleSoft CRM 9.0 with PeopleSoft PeopleTools 8.48 (or earlier) in conjunction with BEA WebLogic 8.1, you must refer to the following task *Modifying the BEA WebLogic File Prior DES Restart* to avoid a series of errors and DES deployment failure.

---

Using Bundle 21 or later on PeopleSoft PeopleTools 8.49 does not require any modification to the application.xml or the weblogic.xml since the jar and ear delivered as a part of Bundle 21 or later would by default work on PeopleSoft PeopleTools 8.49 and no further modification is required.

Using Bundle 20 or earlier on PeopleSoft PeopleTools 8.48 does not require any modification to the application.xml or weblogic.xml since the jar and ear delivered as a part of Bundle 20 or earlier would by default work on PeopleSoft PeopleTools 8.48 and no further modification is required.

Use the appropriate application.xml and weblogic.xml for the respective PeopleSoft PeopleTools releases. The following is an example of the weblogic.xml file that works fine with PeopleSoft PeopleTools 8.49. If the weblogic.xml file is in PeopleSoft PeopleTools 8.49 format, it should appear as shown here:

```

<?xml version="1.0" encoding="UTF-8"?>
<!-- ***** -->
<!--      Confidentiality Information:      -->
<!-- -->
<!-- This module contains confidential and proprietary information -->
<!-- of Oracle; it is not to be copied, reproduced, or transmitted -->
<!-- in any form, by any means, in whole or in part, nor is it to -->
<!-- be used for any purpose other than that for which it is -->
<!-- expressly provided under the applicable license agreement. -->
<!-- -->
<!-- Copyright (C) 2009 Oracle. All Rights Reserved. -->
<!-- ***** -->
<weblogic-web-app xmlns="http://www.bea.com/ns/weblogic/90"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<session-descriptor>
<cookie-name>OMKSESSIONID</cookie-name>
</session-descriptor>
<context-root>/</context-root>

```

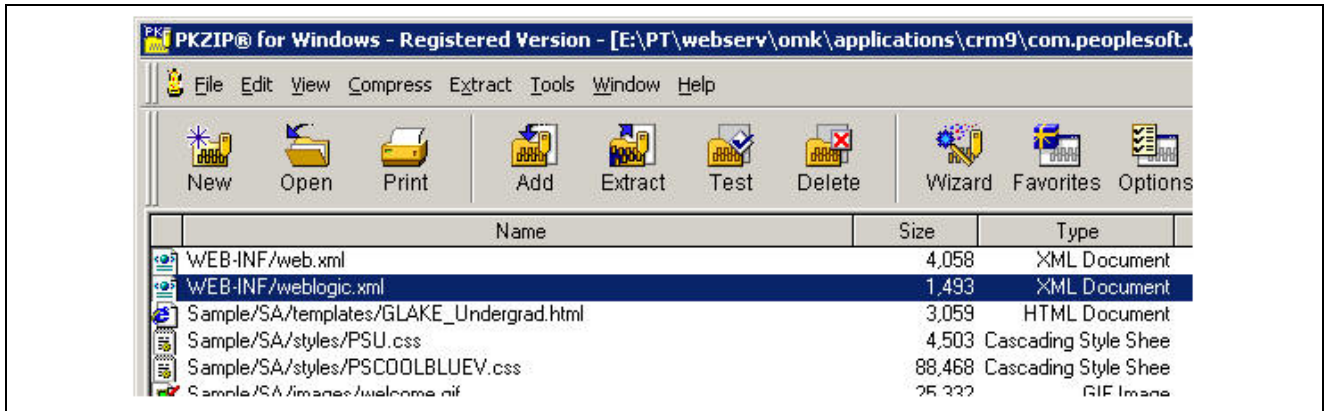
```
</weblogic-web-app>
```

## Task 3-9-4: Modifying the BEA WebLogic File Prior DES Restart

After you install the DES, you must perform the following manual installation steps before you restart the DES.

To replace the weblogic.xml:

1. Locate the com.peoplesoft.crm.omk.war file.



PKZIP showing the WEB-INF weblogic.xml file to be replaced

2. The weblogic.xml file highlighted in this PKZIP example must be replaced.
3. Refer to the contents of the modified weblogic.xml file as follows:

**Note.** This is an example of what the final file content in the weblogic.xml should be for PeopleSoft PeopleTools 8.48 *after* conversion from PeopleSoft PeopleTools 8.49.

```
<!-- ***** -->
<!-- Confidentiality Information: -->
<!-- -->
<!-- This module contains confidential and proprietary information -->
<!-- of Oracle; it is not to be copied, reproduced, or transmitted -->
<!-- in any form, by any means, in whole or in part, nor is it to -->
<!-- be used for any purpose other than that for which it is -->
<!-- expressly provided under the applicable license agreement. -->
<!-- -->
<!-- Copyright (C) 2009 Oracle. All Rights Reserved. -->
<!-- ***** -->
<!DOCTYPE weblogic-web-app PUBLIC "-//BEA Systems, Inc.//DTD Web Application=>
8.1//EN" "http://www.bea.com/servers/wls810/dtd/weblogic810-web-jar.dtd">
<weblogic-web-app>
<session-descriptor>
<session-param>
<param-name>
CookieName
</param-name>
<param-value>
OMKSESSIONID
```

```

</param-value>
</session-param>
<session-param>
<param-name>
CookiesEnabled
</param-name>
<param-value>
true
</param-value>
</session-param>
</session-descriptor>
<context-root>/</context-root>
</weblogic-web-app>

```

4. Using WinZip, replace the existing weblogic.xml file with the modified file.

---

**Warning!** The file path must be the same as the original, as in the previous WinZip example:

WEB-INF/weblogic.xml

---

5. Restart the DES.

---

## Task 3-10: Retrieving and Installing JDBC Drivers

This section discusses:

- Downloading JDBC Drivers
- Installing JDBC Driver on the PeopleSoft Server
- Installing the JDBC Driver on the DES

### Task 3-10-1: Downloading JDBC Drivers

If the PeopleSoft CRM database is installed on an Oracle, MSSQL, or DB2/LUW database, you must download and install the appropriate JDBC drivers for PeopleSoft OLM.

---

**Note.** PeopleSoft CRM OLM requires you to install the JDBC driver on the PeopleSoft Application Server and the Dialog Execution Server.

---

The drivers are:

- For Oracle, 10g ojdbc14.jar, that you can download from [http://www.oracle.com/technology/software/tech/java/sqlj\\_jdbc/index.html](http://www.oracle.com/technology/software/tech/java/sqlj_jdbc/index.html).
- For MSSQL, 2008 sqljdbc.jar, that you can download from the Microsoft website.
- For DB2/LUW, the DB2 JDBC driver comes with licensed jar files.

These files are found in the java directory (or java12 on some installs) under the DB2/LUW home directory on the database server on UNIX or Microsoft Windows. The following three files are required:



- db2jcc.jar
- db2jcc\_license\_cu.jar
- db2jcc\_license\_cisuz.jar

## Task 3-10-2: Installing JDBC Driver on the PeopleSoft Server

Before you begin this procedure, you must download the JDBC driver.

To install the JDBC driver for the PeopleSoft Application Server in the classes directory:

- For UNIX, copy the jar files into *PS\_HOME/appserv/classes*.
- For Microsoft Windows, copy the jar files into *%PS\_HOME%\class*.

## Task 3-10-3: Installing the JDBC Driver on the DES

To install the JDBC driver on the DES:

1. Copy the jar files to the appropriate location as shown in this table:

**Note.** Replace *<omkapp>* with your DES domain name. For example: *PSWebApp* or *omk*.

DES Installed on	UNIX	Microsoft Windows
OAS	%OraHome%\j2ee/<omkapp>/applications/<omkapp>	%OraHome%\j2ee\<omkapp>\applications\<omkapp>
BEA WebLogic	<PS_HOME>/webserve/<DOMAIN_NAME>/lib  For PeopleTools Version 8.49.11 or above, copy jdbc driver jar file(s) here:  %PS_HOME%\webserve /%DOMAIN_NAME%\applications /crm/  <b>Note.</b> Your file may be <i>crm9</i> instead of <i>crm</i> .	<PS_HOME>\webserve\<DOMAIN_NAME>\lib  For PeopleTools Version 8.49.11 or above, copy jdbc driver jar file(s) here:  %PS_HOME%\webserve \%DOMAIN_NAME%\applications \crm\  <b>Note.</b> Your file may be <i>crm9</i> instead of <i>crm</i> .
IBM WebSphere	<WebSphereInstallRoot>/AppServer/lib	<WebSphereInstallRoot>\AppServer\lib

2. Locate the file that you need to modify to add the driver jar files to the DES classpath in the next step.

**OAS:** MANIFEST.MF file (on UNIX or Microsoft Windows)

**BEA WebLogic:**

- For People Tools 8.49.10 or below:  
setEnv.sh file (on UNIX) or setEnv.cmd file (on Microsoft Windows)

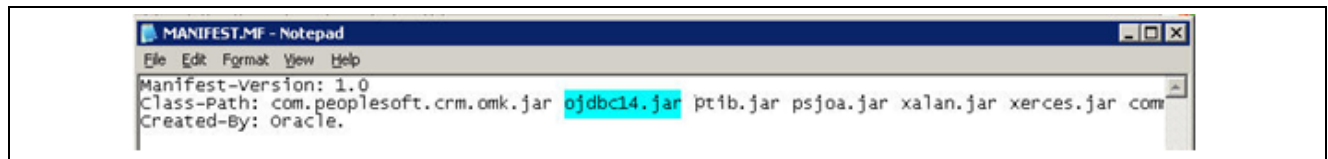
- For People Tools 8.49.11 or above:  
MANIFEST.MF file (on UNIX or Microsoft Windows)

DES Installed on	UNIX	Microsoft Windows
OAS	<OraHome>/j2ee/<omkapp> /applications/omk /com.peoplesoft.crm.omk /META-INF	Windows <OraHome> \j2ee \<omkapp> \applications\<omkapp> \com.peoplesoft.crm.omk\META-INF
BEA WebLogic	<PS_HOME>/webserver/<DOMAIN_NAME>/bin (setEnv.sh)  %PS_HOME%/webserver /%DOMAIN_NAME%/applications /crm/META-INF (MANIFEST.MF)	<PS_HOME>\webserver\<DOMAIN_NAME>\bin (setEnv.cmd)  %PS_HOME%\webserver \%DOMAIN_NAME%\applications \crm\META-INF (MANIFEST.MF)

- Add the driver jar files to the DES classpath:

**For OAS:** Modify the MANIFEST.MF file.

Add jdbc\_jar\_file\_name to the MANIFEST.MF file, as shown in the following example, replacing jdbc\_jar\_file\_name with ojdbc14.jar; or sqljdbc.jar; or db2jcc.jar, db2jcc\_license\_cu.jar, and db2jcc\_license\_cisuz.jar



Example of replacing jdbc\_jar\_file\_name with ojdbc14.jar

Manifest-Version: 1.0

Class-Path: com.peoplesoft.crm.omk.jar ptib.jar psjoa.jar xalan.jar xerces.jar commons-fileupload-1.0.jar commons-net-1.2.2.jar toplink.jar <jdbc\_jar\_file\_name>

Created-By: Oracle.

**For BEA WebLogic with PeopleSoft PeopleTools Version 8.49.10 or below:** Add entries in the setEnv.sh file (on UNIX) or the setEnv.cmd file (on MS Windows).

SET PSCLASSPATH=%PS\_HOME%\webserver\%DOMAIN\_NAME%\lib\ps\_patch.jar;%PS\_HOME%\webserver\%DOMAIN\_NAME%\applications\crm\<jdbc\_jar\_file\_name>;

**Note.** If you are using *PeopleSoft PeopleTools 8.49.14 or below*, the application deploy directory will be *crm9* instead of *crm*. So the path will be:

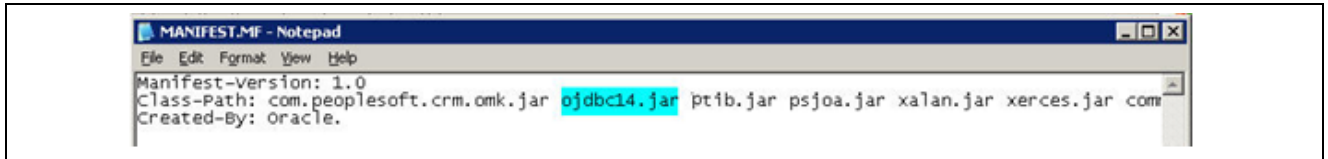
%PS\_HOME% \webserver\%DOMAIN\_NAME%\applications\crm9\<jdbc\_jar\_file\_name>



Example of adding entries in the setEnv.cmd file (MS Windows)

**For BEA WebLogic with PeopleSoft People Tools Version 8.49.11 or above:** Add entries in the MANIFEST.MF.

Add <jdbc\_jar\_file\_name> to the file, as shown in the following example, replacing jdbc\_jar\_file\_name with ojdbc14.jar; or sqljdbc.jar; or db2jcc.jar, db2jcc\_license\_cu.jar, and db2jcc\_license\_cisuz.jar



Example of replacing jdbc\_jar\_file\_name with ojdbc14.jar

---

**Note.** You must manually replace the MANIFEST.MF in the *com.peoplesoft.crm.omk.war* file as well.

---

To manually replace the MANIFEST.MF in the *com.peoplesoft.crm.omk.war* file:

- Create a folder with the name “Meta-inf” on any drive (for example, *C:\meta-inf*).
- Copy the MANIFEST.MF that you just modified to the new Meta-inf directory (for example, *C:\meta-inf\MANIFEST.MF*).
- Open the *com.peoplesoft.crm.omk.war* file with WinZip.
- While in WinZip, highlight and right-click the MANIFEST.MF file and select Delete, to delete the original MANIFEST.MF file from the Zip file.
- Click the Add icon on the WinZip menu to add the new MANIFEST.MF file.

The war file that contains the modified MANIFEST.MF is now ready for use.

---

## Task 3-11: Testing the DES Installation

Before you test the DES installation, you should stop the application server, clear the cache, and restart the server. Then start the DES.

To test the DES installation:

- Test the communication to the server and verify that PeopleSoft OLM is installed.  
Go to `http://<webserver>:<port>/DCS/mcp?rut=1`.  
If the connection is working properly, the web page displays the message “i am here.”
- Verify database connectivity with the web server.  
Go to `http://<webserver>:<port>/DCS/mcp?rutdb=1`.  
If the connection and the database is working properly, the web page displays the message “db: i am here.”
- Verify JOLT connectivity with the web server.  
Go to `http://<webserver>:<port>/DCS/mcp?rutas=1`.  
If the connection and the application server is working properly, the web page displays the message as: “i am here.”
- Verify FTP connectivity with the FTP server.  
Go to `http://<webserver>:<port>/DCS/mcp?rutftp=1`.

If the connection and the application server are working properly, the web page displays the message “ftp: i am here.”

5. Check for errors in the DES log files:

---

**Note.** For a DES UNIX installation, you should log into the machine using the same web server and application server user ID.

---

- For OAS, the log files reside in these directories:  
`<OraHome>\j2ee\<domain name>\applications\<domain name>\DES\DES0.stderr.log`  
`<OraHome>\j2ee\<domain name>\applications\<domain name>\DES\log\DES1_Debug.log`
- For IBM WebSphere, the log files reside in these directories:  
`<PS_HOME>\webserver\<domain name>\DES\DES0.stderr.log`  
`<PS_HOME>\webserver\<domain name>\DES\log\DES1_Debug.log`
- For BEA WebLogic, the log files reside in these directories:  
`<PS_HOME>\webserver\<domain name>\DES\DES0.stderr.log`  
`<PS_HOME>\webserver\<domain name>\DES\log\DES1_Debug.log`

6. Verify that the DES is accessible from the PeopleSoft Pure Internet Architecture:
  - a. Log on to PeopleSoft Pure Internet Architecture.
  - b. Select Marketing, Dialog Monitoring, Control Center, Server Monitor.
  - c. Click the Timer Status button.
  - d. Check for this message Scheduler Timer is running.
7. Verify that the Integration Broker for PeopleSoft OLM is accessible:
  - a. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
  - b. Search for and open the PSFT\_OLM node.
  - c. Select the Connectors tab.
  - d. Click the Ping Node button and verify that the ping was successful.

---

## Task 3-12: Testing the Email Server

You must obtain and install a recommended additional component email server. Oracle does not provide this email server. After the email server installs, you must test to ensure that it is operational.

To verify that the email server is operational, perform the following tests:

1. If ping is enabled on your servers, ensure that the email server can send a ping notification to and receive a ping notification from the machine where the PeopleSoft OLM Mailcaster will be installed.
2. On the Mailcaster system, telnet to port 25 of the email server to test SMTP connectivity as follows:

```
telnet <emailserver> 25
HELO there
QUIT
```

3. Create a POP account on your email server.
4. On the Mailcaster system, telnet to port 110 to test POP account connectivity:

```
telnet <emailserver> 110
HELO there
QUIT
```

---

## Task 3-13: Adding Standalone Dialog Servers (Optional)

This section discusses:

- Understanding Adding Standalone Dialog Servers
- Adding Standalone Dialog Servers
- Adding E-Mail Response Processor
- Adding Mail Service
- Adding Watch Dog
- Starting, Stopping, and Deleting Services

### Understanding Adding Standalone Dialog Servers

If you run your batch servers on UNIX and want to run an enterprise resource planning (ERP) application, first you must copy the `ptib.jar` file from the DES installation to the `PS_HOME/setup` directory on the batch server.

---

**Note.** This task is not a requirement for Microsoft Windows and is only necessary if you plan to run ERP on the system.

---

To add standalone dialog servers, you must complete the following steps to ensure that the Process Scheduler is started.

### Task 3-13-1: Adding Standalone Dialog Servers

To add standalone dialog servers:

1. Select Marketing, Dialog Monitoring, Control Center, Maintain Dialog Servers.  
The Maintain Dialog Servers page appears.

**Maintain Dialog Servers**

Server Instances Customize | Find | View All | First 1-7 of 7 Last

*Server Name	*Instance Type	Service Type	Instance	Server Status	Request Status			
NT Server Agent	Mail Service	Single Emailer	1	Running	fully functional	Start	Stop	
NT Server Agent	Mail Service	Mailcaster	2	Running	fully functional	Start	Stop	
PSNT4	Mail Service	Mailcaster	3	Running	fully functional	Start	Stop	
PSNT4	Mail Service	Single Emailer	4	Running	fully functional	Start	Stop	
PSNT4	Mail Service	Mailcaster	5	Running	fully functional	Start	Stop	
NT Server Agent	Mail Service	Mailcaster	6	Running	fully functional	Start	Stop	
NT Server Agent	Watch Dog			Stopped	Create Requested	Start	Stop	

Create a new Instance Refresh

Save

Maintain Dialog Servers page

- Click the Create a New Instance button.
- From the Server Name list, select one of your Process Scheduler servers.
- Select the type of service that you want to add: *E-Mail Response Processor*, *Mail Service*, or *Watch Dog*.

**Note.** Adding services of each type increases the generated instance ID. The names of the directories that you create reflect this instance ID. For example, Mail Service with an instance ID of 3 creates an MCR3 directory.

- To finish adding the service that you selected in the previous step, go to one of the following procedures, as appropriate:
  - Adding E-Mail Response Processor
  - Adding Mail Service
  - Adding Watch Dog

## Task 3-13-2: Adding E-Mail Response Processor

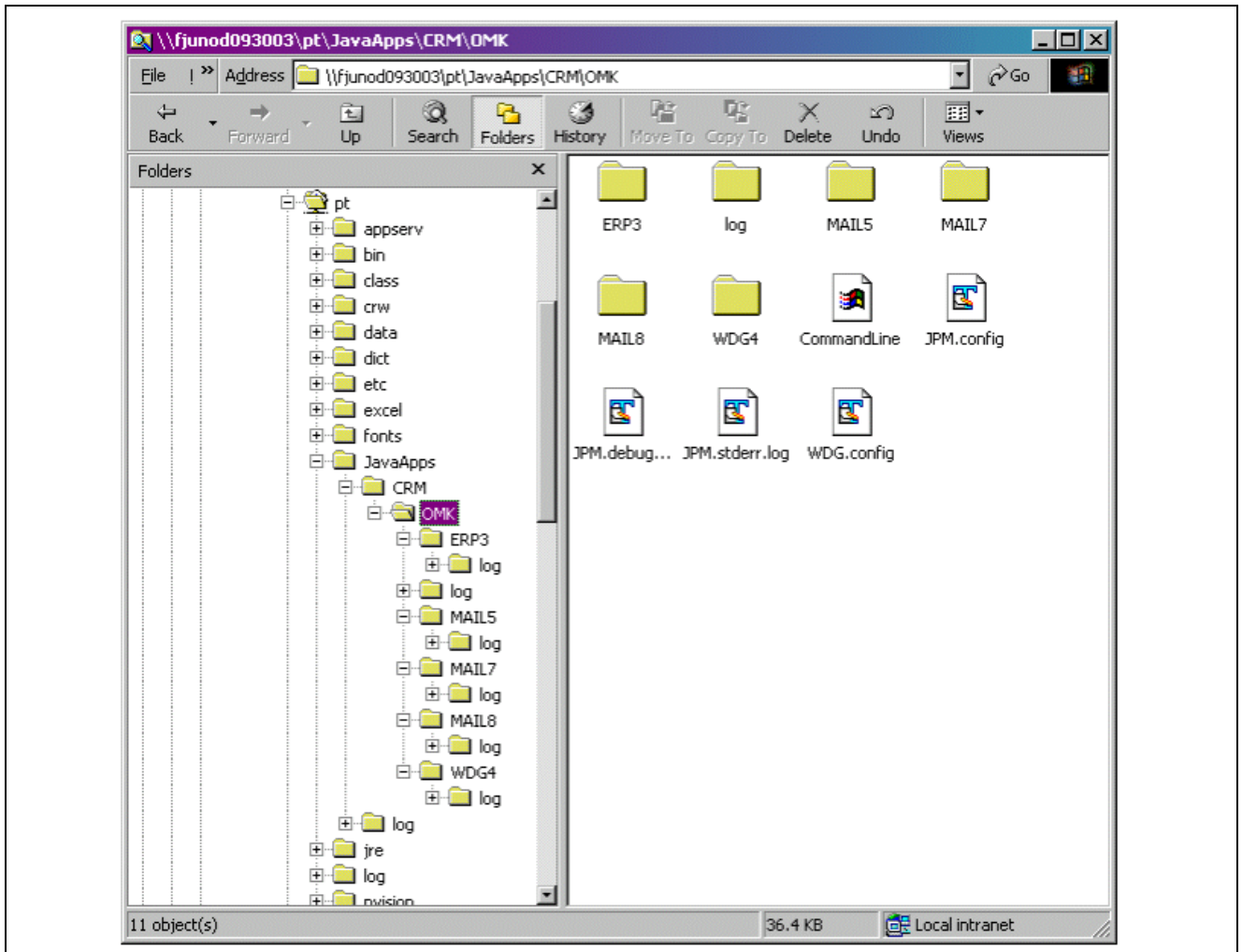
If you select *E-Mail Response Processor* for the service type in step 4 of *Adding Standalone Dialog Servers*, you must finish the service installation by continuing with these steps.

To add the E-Mail Response Processor service:

- Select one of the following service type options, and click Save:
  - Bounce Process*—Select to manage mail bounces for cases in which the mail was sent to a nonexistent user.
  - Reply Process*—Select to manage reply mails from existing users.
- The request status is *Create Requested*.

This status changes to *Create Successful* or *Create Failed* when the process completes.

When successful, this step creates a *PS\_HOME/JavaApps/CRM/OMK/ERP3* directory under the selected Process Scheduler installation:



Example of OMK directory

3. Go to the installation directory and edit either bounce.script or reply.script, depending on which service option you installed.

Both files are placed in this directory in case you want to change the behavior of this ERP. Many parameters must be modified because not all of the necessary information is available at installation. Some fields prepopulate with information that was available at the time of the installation. See the ERP documentation for details about configuring the ERP.

The commandLine file in the same directory is the command that is run to start this ERP. If you want to modify the ERP server type (bounce, reply, or both), change the script that is included at the end of the command. If you include both, the ERP process performs both. More information is available in the ERP documentation.

If you want *both* bounce and reply processing to occur, Oracle recommends that you set up both script files and change the commandLine file to include *both* script file names on the command line.

### Task 3-13-3: Adding Mail Service

If you select *Mail Service* for the service type in step 4 of *Adding Standalone Dialog Servers*, you must finish the service installation by continuing with these steps.

To add Mail Service:

1. Select one of the following service type options, and click Save:
  - *Mailcaster*—Select to send bulk mails.
  - *Single Mailer*—Select to send single mails.
  - *Frequency Mailer*—Select to queue the bulk mails and single mails according to the frequency policy.
2. The request status is *Create Requested*.  
 This status changes to *Create Successful* or *Create Failed* when the process completes.  
 This step creates a *PS\_HOME/JavaApps/CRM/OMK/MCR1* directory under the selected Process Scheduler installation.
3. You can review the *MCR.config* file that can be found in the created directory, but you should not need to modify it unless you want to make a specific change.
4. If you want to change the type of mail service (for example, from bulk to single), edit the *commandLine* file and change the “-t” parameter.  
 Use *single* for single mailer, *bulk* for bulk mail, and *frequency* for frequency mail.
5. If you select *Mail Service*, you can use it to install another service type.  
 Because you will need both a single mailer and a bulk mailer, and you may also need a frequency mailer, you can repeat the preceding mail service installation steps 1 through 4 by selecting a different service type option. This will install as *MCR2* or *CRM3*.

---

**Important!** If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the Mailcaster RMI server object to listen on a specific port. Add the following configuration parameters to each *MCR.config* file: *HAS\_FIREWALL=true*, and *FIREWALL\_PORT=PORT#*, where *PORT#* is the number of the port that has been opened in the firewall.

The default RMI port 1099, or the port to be specified in the *RMIPORT* config parameter, must open in the firewall as well. That port is the one through which the DES connects to the RMI registry.

---

## Task 3-13-4: Adding Watch Dog

If you select *Watch Dog* for the service type in step 4 of *Adding Standalone Dialog Servers*, you must finish the service installation by continuing with these steps.

To add the Watch Dog service:

1. Watch Dog has no service type options, so if you selected the Watch Dog service, just click Save.
2. The request status is *Create Requested*. This status changes to *Create Successful* or *Create Failed* when the process completes.  
 This step creates a *PS\_HOME/JavaApps/CRM/OMK/WDG1* directory under the selected Process Scheduler installation.
3. Edit the *WDG.config* file.  
 The Watch Dog configuration file is complicated; therefore, you should review the Watch Dog documentation before attempting the configuration.
4. If you are installing more than one Watch Dog on the same machine, you must set *qkLookPort* differently in each of the configuration files.  
 However, there should be no reason to run more than one Watch Dog on the same server.



## Task 3-13-5: Starting, Stopping, and Deleting Services

To start one of the services, click the Start button and then click Save. You must click Save to start the service.

---

**Note.** The Start button is not active until the services are at the *Create Successful* state.

---

The system sets the state to *Run Requested*, and that changes to *Fully Functional*. If the state becomes *Run Request Failed*, further diagnosis is necessary. Many log files in the JavaApps directory tree can help with this result.

To stop a service, click the Stop button and then click Save. You must click Save to stop the service.

---

**Note.** The Stop button is not active unless a service is operational.

---

The state changes to *Stop Requested*, and that changes to *Shutdown Normally* or *Timed Out* or *killed by process monitor*. In either case, the process stops. If the state changes to *Stop Request Failed*, then further investigation is needed.

To delete a service, wait until the process stops and the trashcan button becomes active. Then click the trashcan button and click Save to delete the service.

---

## Task 3-14: Setting Up Profiles

### Task 3-14-1: Setting Up Automatic Numbering for Profiles

Define the automatic number initial value for profiles, to ensure that Oracle can deliver system profiles in future releases.

To set up automatic numbering for profiles:

1. Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering.
2. Search for a row using these search parameters: SetID field set to *SHARE* and Number Type field set to *Profile*.
3. If no row matches, then click Add a New Value. If a row matches, open it.
4. Enter or verify the settings and click Save.

---

**Note.** If the existing value is greater than 20,000, retain the existing value without changes.

---

SetID SHARE SHARE

Number Type PROF Profile

\*Field Name RA\_PROFILE\_ID Length 18

*Start Seq	*Max Length	*Description	Last Number Issued	Default?
000	18	Profile Id	20000	<input checked="" type="checkbox"/>

Save Return to Search Add Update/Display

Profile Automatic Number page

## Task 3-14-2: Setting Non English Based Reserved Word

If the base language for the PeopleSoft CRM database is a language other than English:

1. Run the PeopleSoft Data Mover Script *resetreservedwords.dms* in PeopleSoft Data Mover.
2. Run the Application Engine program RA\_PROF\_CACH from PeopleSoft Application Designer to refresh the Application profile cache.
3. Sign in to PeopleSoft Pure Internet Architecture and manually open and immediately save each document in the Demo database.

---

**Note.** This step applies only to Demo databases.

---

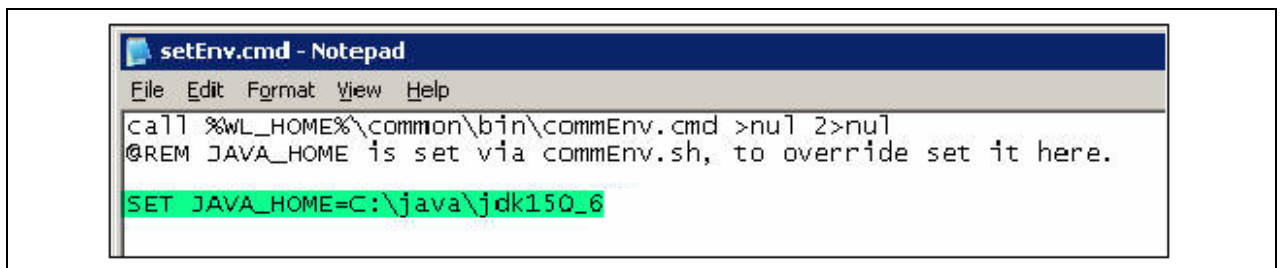
4. Stop and restart the PeopleSoft Application Server and clear the server cache.
5. Stop and restart the DES.
6. If the name of any of the profile fields—Individual.People.Role Type, Individual.People.Do Not Email, and Individual.People.Organization Role Type—were modified and the profile reactivated, you must update the configuration parameters as follows:
  - a. Select Set Up CRM, Product Related, Online Marketing, Setting.
  - b. Change the value of the doNotEMailProfileElementName parameter to the value of the *Individual.People.Do Not Email* parameter.
  - c. Change the value of the roleTypeIdProfileElementName parameter to the value of the *Individual.People.Role Type* parameter.
  - d. Change the value of the orgRoleTypeIdProfileElementName parameter to the value of the *Individual.People.Organization Role Type* parameter.
  - e. Click Save.

## Task 3-14-3: Verifying the Correct Sun Java JDK Version

Due to a date parsing issue with Sun Java JDK 1.5\_04, Marketing Profiles activation may fail. To avoid this issue, Oracle recommends that you upgrade the Sun Java JDK version to at least 1.5\_06 where the parsing issues are resolved. After you install Sun Java JDK 1.5\_06 on the DES machine, change the JAVA\_HOME parameter in the setEnv.cmd file (Microsoft Windows) or the setEnv.sh file (UNIX) to use the JDK version 1.5\_06.

To verify the Sun Java JDK version:

1. Edit the setEnv.cmd file (for Microsoft Windows) or the setEnv.sh file (for UNIX) as follows:
  - a. Locate the {PS\_HOME}\websevr\{DES-Domain}\bin, and then open the setEnv.cmd file (Microsoft Windows) or the SetEnv.sh file (UNIX).
  - b. Search SET JAVA\_HOME for the value of the JAVA HOME property.  
 If the JAVA HOME does *not* point to Sun Java JDK 1.5\_06, you are fine and no further action is required.  
 Otherwise, continue these instructions.
2. Install Sun Java JDK 1.5\_06 on your system as follows:
  - a. Download and install Sun Java JDK 1.5\_06 (do *not* install the JRE version).
  - b. Change the JAVA\_HOME to point to the JDK that you just installed.
 For example:



Example showing the setEnv.cmd file for Microsoft Windows edited to SET JAVA\_HOME=C:\java\jdk150\_6

3. Save the changes that you just made to the setEnv.cmd file (Microsoft Windows) or the setEnv.sh file (UNIX).
4. Restart the DES.

---

## Task 3-15: Tuning the System (Optional)

This section discusses:

- Improving PeopleSoft OLM Transaction Performance
- Starting the Daily Survey Report Data Purge
- Checking Heap Size for Java Virtual Machine on DES

### Task 3-15-1: Improving PeopleSoft OLM Transaction Performance

For PeopleSoft OLM inserts to perform properly, you must set the security of the Person object to *Scheduled Always*.

---

**Note.** You must complete this task if you are planning to run the PeopleSoft OLM and Student Administration (SA) integration demo dialogs.

---

To set the security of the Person object:

1. Select Set Up CRM, Security, CRM Application Security, Security Object.
2. Search for the object ID *PERSON*.
3. In the Cache Option field, select *Scheduled Always*.

**Security Object**

Save Run Search Next Previous Refresh Add Security Object

**Object ID** PERSON **Object Name** Person

**Security Object Definition**

\*Object Name Person \*Object Type Membership

Description Person Security Object

\*View Record RSEC\_SL\_PER\_VW \*Security List Record RSEC\_ML\_PERSON

Object Source Navigation Person Search Static List Navigation Person Static Member List

Cache Option Scheduled Always

Security Object page

4. Click Save.

## Task 3-15-2: Starting the Daily Survey Report Data Purge

When you generate Survey ACE reports frequently, you increase the data volume in the report table and affect system performance. Starting a daily report data purge process can help maximize your system performance for Survey ACE report generation.

To start the daily survey report data purge Process Scheduler:

1. Select PeopleTools, Process Scheduler, System Process Requests.
2. Create a new Run Control ID *OLM\_ACE\_REPORT\_PURGE*.
3. Click Run.
4. Under Process Name, find *RY\_RPT\_SV\_CP* and select the check box for that row.

**Process Scheduler Request**

User ID: VP1 Run Control ID: OLM\_ACE\_REPORT\_PURGE

Server Name: PSNT Run Date: 03/28/2006

Recurrence: Run Time: 11:06:19AM Reset to Current Date/Time

Time Zone:

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Generates 2 Copies of XRFWIN	XRFWIN2	SQR Report	Web	PDF	<a href="#">Distribution</a>
<input type="checkbox"/>	Cross Reference Window Listing	XRFWIN	SQR Report	Web	PDF	<a href="#">Distribution</a>
<input type="checkbox"/>	<a href="#">All SQR Xref Reports</a>	SQRXRF	PSJob	(None)	(None)	<a href="#">Distribution</a>
<input checked="" type="checkbox"/>	RY_RPT_SV_CP	RY_RPT_SV_CP	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input type="checkbox"/>	Email Freq. Policy batch count	RY_EM_CNT	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input type="checkbox"/>	RY_BNC_UPDT	RY_BNC_UPDT	Application Engine	Web	TXT	<a href="#">Distribution</a>

OK Cancel Refresh

Process Scheduler Request page

5. Click OK.

## Task 3-15-3: Checking Heap Size for Java Virtual Machine on DES

This section discusses:

- Understanding Memory Allocation for the DES
- Checking DES Java Options for DES on OAS
- Checking DES Java Options for DES on BEA WebLogic
- Checking DES Java Options for DES on IBM WebSphere

### Understanding Memory Allocation for the DES

You must allocate an appropriate amount of memory based on DES usage.

Verify that `-Xms32m -Xmx512m -XX:MaxPermSize=512m` is specified in the DES JAVA options.

### Checking DES Java Options for DES on OAS

To check the DES Java options for DES on OAS:

1. Log on to the OAS administration console.
2. Open the DES OC4J instance (that is, omk) and select the Administration tab.
3. Click the Server Properties link.
4. Check the value in the Java Options field under Command Line Options.
5. If `-Xms32m -Xmx512m -XX:MaxPermSize=512m` does not appear in the Java Options field, add it and then click the Apply button.

### Checking DES Java Options for DES on BEA WebLogic

To check the DES Java options for DES on BEA WebLogic:

1. Open the DES SetEnv file and check the Java options.
2. Check the value of SET JAVA\_OPTIONS\_WIN32=.
3. If `-Xms32m -Xmx512m -XX:MaxPermSize=512m` does not appear, add it and save the file.

### Checking DES Java Options for DES on IBM WebSphere

To check the DES Java options for DES on IBM WebSphere:

1. If Heapdumps and JavaCore dumps are being generated in IBM WebSphere in the *WebSphereRoot/AppServer* directory, increasing the maxHeapSize to 512 megabytes may help.

Increase the maxHeapSize as shown here:

```
<WebSphereRoot>\config\cells\<Nodename>\nodes\<Nodename>\servers\<omkserver>=>
\server.xml
  has following...the maxHeapSize is in Megabytes
<jvmEntries XMI:id="JavaVirtualMachine_1"
  verboseModeClass="false"
  verboseModeGarbageCollection="false"
  verboseModeJNI="false"
  initialHeapSize="0"
  maximumHeapSize="256"
  runHProf="false"
```

```
hprofArguments=""  
debugMode="false"  
debugArgs="-DJava.compiler=NONE -Xdebug -Xnoagent -Xrunjdwp:transport=dt_⇒  
socket,server=y,suspend=n,address=7777"  
genericJvmArguments="">  
...  
</jvmEntries>
```

2. After you modify the Java options, restart the DES.

## CHAPTER 4

# Installing PeopleSoft Order Capture Self-Service 9

This chapter discusses:

- Understanding PeopleSoft Order Capture Self-Service
- Understanding the Guest User Role
- Understanding the Homepage URL
- Defining the Guest User
- Disabling the New Window URL

---

## Understanding PeopleSoft Order Capture Self-Service

This chapter provides instructions for the installation and setup of Oracle's PeopleSoft Enterprise Order Capture Self-Service with the PeopleSoft Pure Internet Architecture. These instructions assume that you have already installed and configured a PeopleSoft CRM 9 database following the instructions provided earlier in this guide.

See "Installing PeopleSoft Enterprise CRM 9 Applications."

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

PeopleSoft Order Capture Self-Service (OCSS) is an externally facing application; therefore Oracle recommends that you implement PeopleSoft OCSS on separate web and application servers from your other internally facing PeopleSoft applications. This improves performance, increases security and minimizes downtime for your website.

### See Also

*PeopleSoft Enterprise PeopleTools 8.48 Installation (for your database platform)* PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, PeopleTools)

"PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index," PeopleSoft Customer Connection, (Support, Documentation, Documentation Updates, Enterprise, Customer Relationship Management, All Products)

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*

## Understanding the Guest User Role

PeopleSoft OCSS does not use the standard PeopleSoft PeopleTools sign-on screen. Instead, all visitors to your site are automatically signed in with a default user ID of your choice (referred to as the *guest* user for the remainder of this chapter). The guest user ID determines the default language and business unit for your site. You must define and assign the following guest user roles:

- Guest
- PeopleSoft Guest

Oracle delivers a sample *GUEST* user profile as an example. You can use the example to understand how to set up a guest user correctly and clone the profile as necessary. The guest user definition determines the default language and business unit in use on your site.

To view the sample guest user profile, select PeopleTools, Security, User Profiles.

The screenshot shows the 'General' tab of the 'User Profile' page for the 'GUEST' user. The page is divided into several sections:







- General Information:**
  - User ID: GUEST
  - Description: Guest
  - ☐ Account Locked Out?
- Logon Information:**
  - Symbolic ID: sa (dropdown)
  - Password: [masked]
  - Confirm Password: [masked]
  - User ID Alias: [empty field]
  - ☐ Expire password at next login
  - [Edit Email Addresses](#)
- General Attributes:**
  - Language Code: English (dropdown)
  - Currency Code: US Dollar (dropdown)
  - Default Mobile Page: [empty field]
  - ☐ Enable Expert Entry
- Permission Lists:**
  - Navigator: ALLPAGES (dropdown) [Explain](#)
  - Homepage: ALLPAGES (dropdown) [Explain](#)
  - Process Profile: ALLPAGES (dropdown) [Explain](#)
  - Primary: ALLPAGES (dropdown) [Explain](#)
  - Row Security: ALLPAGES (dropdown) [Explain](#)

User Profile page: General tab

You can define the business unit on the Overall Preferences page by selecting Set Up CRM, Security, User Preferences.

This Business Unit must be a valid PeopleSoft Order Capture (OC) Business Unit.



Overall Preferences		Call Center	Sales	Change Management
<b>User ID</b>	GUEST			
<b>Description</b>	Guest			
<b>Overall Preferences</b>				
<b>Business Unit</b>	APP01		Appliances	
<b>SetID</b>	IPROD		Appliances	
<b>As of Date</b>	01/31/2002			
<b>Localization Country</b>	USA		United States	
<b>Requester</b>	SAMPLE			
<b>Role Type ID</b>				
<b>Company Name</b>	<input type="text"/>			
<b>Partner Relationship Type</b>	<input type="text"/>			
<b>*Market</b>	Global			
<b>Order Capture Unit</b>	APP01			
<b>Mobile Customer Options</b>	<input type="text"/>			
<b>PIM Preference ID</b>	<input type="text"/>			
<input type="checkbox"/> <b>Alternate Character Enabled</b> <input type="checkbox"/> <b>Wealth Management</b>				

Overall Preferences page

If no business unit is defined on the Overall Preferences page, you can define the default business unit by using the Default Business Unit option set on the Order Capture Business Unit Definition page.

To define or view PeopleSoft OC business units, select Setup CRM, Business Unit Related, Order Capture Definition.

Internal business unit page

Verify that your guest user is set up to meet your business needs.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences."

## Understanding the Homepage URL

The URL of your PeopleSoft OCSS homepage depends on a number of factors. The following is a breakdown of the components of the URL:

`http://<ServerName>/psp/<Site>/<portal>/<Node>/h/?tab=DEFAULT`

- *Server Name*—This is your server name (for example, `www.mycompany.com`).
- *Site*—This is your server name (for example, `www.mycompany.com`).
- *Node*—This is the local portal node.

For example, if you accept all of the defaults when you install PeopleSoft OCSS, your URL looks like this:

`http://www.servername.com/psp/ps/CUSTOMER/PSFT_CR/h/?tab=DEFAULT`

## Task 4-1: Defining the Guest User

To define the guest user in the `configuration.properties` file:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Open the DEV profile definition.
3. Select the Security tab and locate the Public Users section.
4. Select the Allow Public Access check box.

5. Enter *GUEST* in the User ID field and in the Password field.
6. Click Save.

The screenshot displays the 'Security' tab of the 'Web Profile Configuration' for a profile named 'DEV'. The interface includes several configuration sections:

- General Settings:**
  - Profile Name: DEV
  - Days to Auto Fill User ID: 7
  - View File Time to Live: 0 Seconds
  - PIA use HTTP Same Server: ☐
  - Allow Unregistered Content: ☒
  - SSL: ☐ Secured Access Only, ☒ Secure Cookie with SSL
- Authenticated Users:**
  - Inactivity Warning: 1,080 Seconds
  - Inactivity Logout: 1,200 Seconds
  - HTTP Session Inactivity: 0 Seconds
  - Timeout Warning Script: WEBLIB\_TIMEOUT.PT\_TIMEOUTWARNING.FieldFormula.IScript\_TIMEOUTWARNING (with an Override button)
- Public Users:**
  - Allow Public Access: ☒
  - User ID: GUEST
  - Password: \*\*\*\*\*
  - HTTP Session Inactivity: 1,200 Seconds

Web Profile Configuration: Security page

## Task 4-2: Disabling the New Window URL

Disable the New Window link that is provided by default on every PeopleSoft Pure Internet Architecture page. If present, this link creates a potential security hole in your application.

To disable the New Window link, modify the web server *configuration.properties* file as follows:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Open the DEV profile definition.
3. Clear the Enable New Window check box.
4. Click Save.



The image shows a web browser window with a tabbed interface. The 'General' tab is selected. The page contains several configuration fields and checkboxes. The 'Profile Name' is 'DEV', and the 'Description' is 'Installation Defaults'. The 'Authentication Domain' is 'peoplesoft.com'. The 'Help URL' is 'http://peoplebooks.peoplesoft.com/html/doc/crm88sp1/f1search.htm?ContextID=%C'. There are checkboxes for 'Compress Responses' (checked), 'Compress Response References' (unchecked), 'Compress Query' (checked), 'Enable Processing Message' (checked), 'Enable New Window' (unchecked), 'Enable PPM Agent' (checked), and 'Single Thread Netscape' (unchecked). There are also input fields for 'Save Confirmation Display Time' (3,000 Milliseconds), 'PPM Monitor Buffer Size' (51,200 KB), and 'Single Thread Delay' (1,000 Milliseconds). Buttons for 'Save As ...' and 'View History' are visible.

**General** Security Virtual Addressing Cookie Rules Caching

**Profile Name:** DEV [Save As ...](#) [View History](#)

**Description:** Installation Defaults

**Authentication Domain:** .peoplesoft.com

**Help URL:** http://peoplebooks.peoplesoft.com/html/doc/crm88sp1/f1search.htm?ContextID=%C

☒ **Compress Responses** ?

☐ **Compress Response References** ?

Compress Mime Types: application/x-javascript,text/javascript,text/css,text/html

☒ **Compress Query** ?

**Save Confirmation Display Time:** 3,000 Milliseconds ?

☒ **Enable Processing Message** ?

☐ **Enable New Window** ?

☒ **Enable PPM Agent** ?

**PPM Monitor Buffer Size:** 51,200 KB ?

☐ **Single Thread Netscape** ?

**Single Thread Delay:** 1,000 Milliseconds ?

Web Profile Configuration: General page

## CHAPTER 5

# Integrating Additional Software with PeopleSoft Order Capture and PeopleSoft Order Capture Self-Service

This chapter discusses:

- Understanding Additional Software Integration with PeopleSoft Order Capture and PeopleSoft Order Capture Self-Service
- Integrating the PeopleSoft Freight Calculation
- Setting Up Business Interlink Architecture for Tax Integration
- Installing ADP Taxware and Vertex Databases
- Setting Up Integration of PeopleSoft Order Capture with ADP Taxware WorldTax

---

## Understanding Additional Software Integration with PeopleSoft Order Capture and PeopleSoft Order Capture Self-Service

This chapter provides instructions for the integration and setup of additional software with Oracle's PeopleSoft Enterprise Order Capture (OC) and Order Capture Self-Service (OCSS).

---

**Note.** Before proceeding with your installation, consult Oracle's PeopleSoft Customer Connection website to ensure that you have the latest version of the following documents: PeopleSoft Enterprise CRM 9 Supplemental Installation Guide, PeopleSoft Enterprise PeopleTools Installation guide for your database platform, and PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks.

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**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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## Task 5-1: Integrating the PeopleSoft Freight Calculation

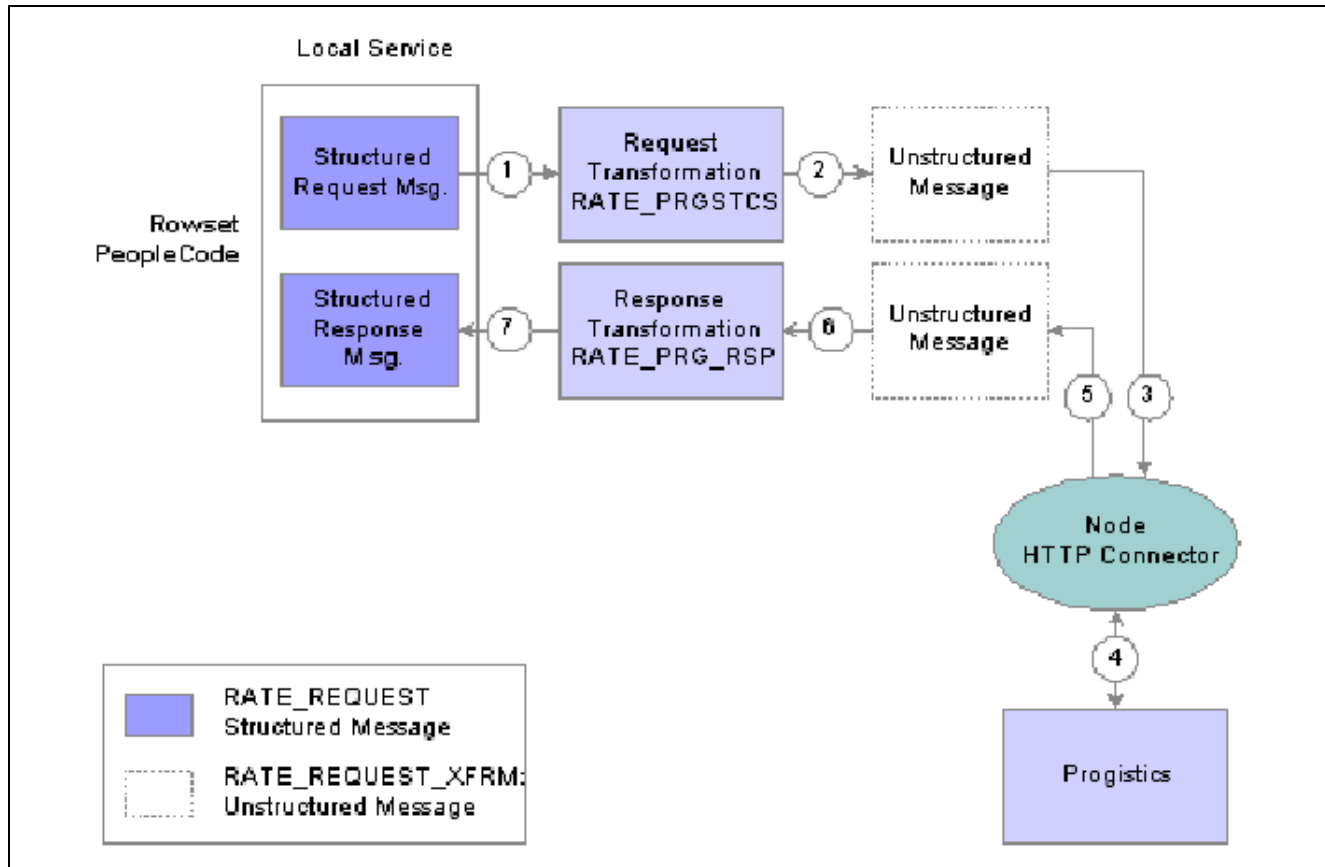
This section discusses:

- Understanding the PeopleSoft Freight Calculation Integration
- Setting Up PeopleSoft Freight Calculation

- Testing the PeopleSoft Freight Calculation

## Understanding the PeopleSoft Freight Calculation Integration

PeopleSoft products integrate with the Prologistics ConnectShip application for freight calculation. Application messaging is used to communicate to the Prologistics freight server. This task discusses how to set up the freight calculation integration. The following graphic represents the message flow between PeopleSoft applications and the Prologistics ConnectShip application:



Message flow between PeopleSoft applications and the Prologistics ConnectShip application

### Task 5-1-1: Setting Up PeopleSoft Freight Calculation

To set up PeopleSoft freight calculation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Search for the RATE\_REQUEST service operation.
3. On the Service Operation - General page, select the Active check box.
4. Click Save.

**General** | Handlers | Routings

**Service Operation:** RATE\_REQUEST  
**Service:** RATE\_REQUEST  
**Operation Type:** Synchronous

**\*Operation Description:** Freight Calc Rate Request ☐ **User/Password Required**

**Operation Comments:**

**Object Owner ID:** Order Capture Internal

**Operation Alias:**  [Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_1 ☒ **Default** ☒ **Active**

**Version Description:** Freight Calc Rate Request

**Version Comments:**

☐ **Non-Repudiation**  
☐ **Runtime Schema Validation**

[Intropection](#)

**Routing Status**

**Any-to-Local:** Does not exist  
**Local-to-Local:** Does not exist

**Routing Actions Upon Save**

☐ **Generate Any-to-Local**  
☐ **Generate Local-to-Local**

**Message Information**

**Type:** Request  
**Message.Version:** RATE\_REQUEST.VERSION\_1

**Type:** Response  
**Message.Version:** RATE\_RESPONSE.VERSION\_1

Service Operation: General page

- Set the FREIGHT queue to *Run*.

Select PeopleTools, Integration Broker, Integration Setup, Queues and search for the queue name FREIGHT. On the Queue Definitions page, set Queue Status to *Run* and click Save.

**Queue Definitions**

Queue Name: FREIGHT ☒ Archive ☐ Unordered

Description: Freight Calculations Queue Status: Run

Comments: Channel used by third-party freight calculation Object Owner ID: Ordr Cap I

Operations Assigned to Queue Define Partitioning Fields

Service Operations View All First 1 of 1 Last

Operation	Version
RATE_REQUEST	VERSION_1

Common Fields View All First 1-3 of 3 Last

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

Save Add Field

Queue Definitions page

6. Activate the RATE\_REQUEST routing.

Select PeopleTools, Integration Broker, Integration Setup, Routings and enter *RATE\_REQUEST* in the Service Operation search field. On the Routing Definitions page, select the Active check box.

Optionally, you can set the Log Detail field to *Header and Details* to facilitate troubleshooting of the freight calculation setup.

**Routing Definitions** Parameters Connector Properties

Routing Name: ~GEN~UPG~24406 ☒ Active

\*Service Operation: RATE\_REQUEST ☐ System Generated

Version: VERSION\_1

\*Description: ~GEN~UPG~24406

Comments:

\*Sender Node: PSFT\_CR

\*Receiver Node: PSFT\_XOUTBND

Routing Type: Synchronous ☐ User Exception

Object Owner ID: Order Capture Internal

\*Log Detail: Header and Detail

Save

Routing Definitions page

7. Set up the connector properties for the freight server.

Click the Connector Properties tab to access the Connector Properties page and enter rows with the following field values:



Property ID	Property Name	Value
Header	Content-Type	text/xml
HTTPPROPERTY	Method	POST
PRIMARYURL	URL	ENTER the URL for the freight server.  <b>Note.</b> The URL format will be similar to http://<machine>/Prologistics/XML_Processor/Server/XMLProcDLL.asp. If you are not using port 80 on the prologistics server, indicate the port in this the url, for example, <machine>:8080 .

Routing Definitions Parameters **Connector Properties**

**Routing Name:** ~GEN~UPG~24406

**Service Operation:** RATE\_REQUEST

**Service Operation Version:** VERSION\_1

**Gateway ID:** LOCAL

**Connector ID:** HTTPTARGET

**Connector Properties** Customize Find View All First 1-3 of 3 Last

Property ID	Property Name	Value
HEADER	Content-Type	text/xml
HTTPPROPERTY	Method	POST
PRIMARYURL	URL	http://ple-gscott:8080/Prologistics/XML

Save

Connector Properties page

## Task 5-1-2: Testing the PeopleSoft Freight Calculation

To test PeopleSoft Freight Calculations:

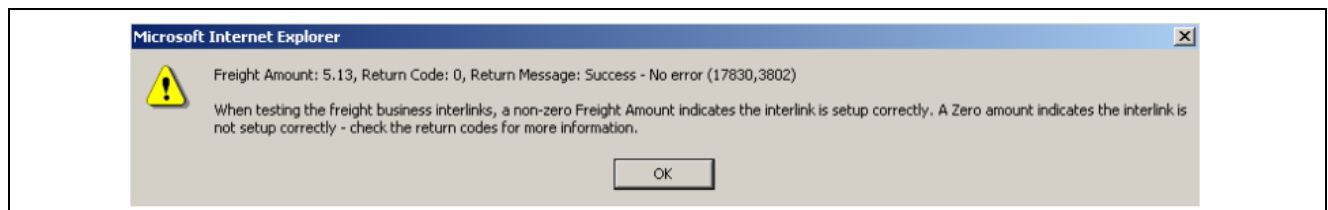
**Note.** This test uses UPS Ground as the carrier (TANDATA-UPS.UPS.GND). If you have not configured UPS Ground in Prologistics for your business unit, the test can not calculate freight amounts.

1. Select Setup CRM, Business Unit Related, Order Capture Definition to open the Prologistics Business Unit definition set up within PeopleSoft CRM.

Order Capture Definition - Internal page (partial)

## 2. Click the Test Freight link.

A message box displays with the results of your test:



Freight Amount Success Message

If the Freight Amount returned is not zero, you are set up correctly.

## 3. Troubleshoot setup issues.

If a zero freight amount is returned, check the Return Code and Return Message for assistance in determining what is not set up correctly. If you enabled Header and Details logging on the Routing Definitions page, you can also examine the synchronous message sent to Prologistics during this test.

To view the synchronous message details, select PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Synchronous Details.

# Task 5-2: Setting Up Business Interlink Architecture for Tax Integration

This section discusses:

- Understanding Business Interlink Architecture for Tax Integration

- Selecting Vendor Plug-in Locations
- Editing the Application Server Configuration File
- Selecting Vendor DLLs and Shared Library Locations

## Understanding Business Interlink Architecture for Tax Integration

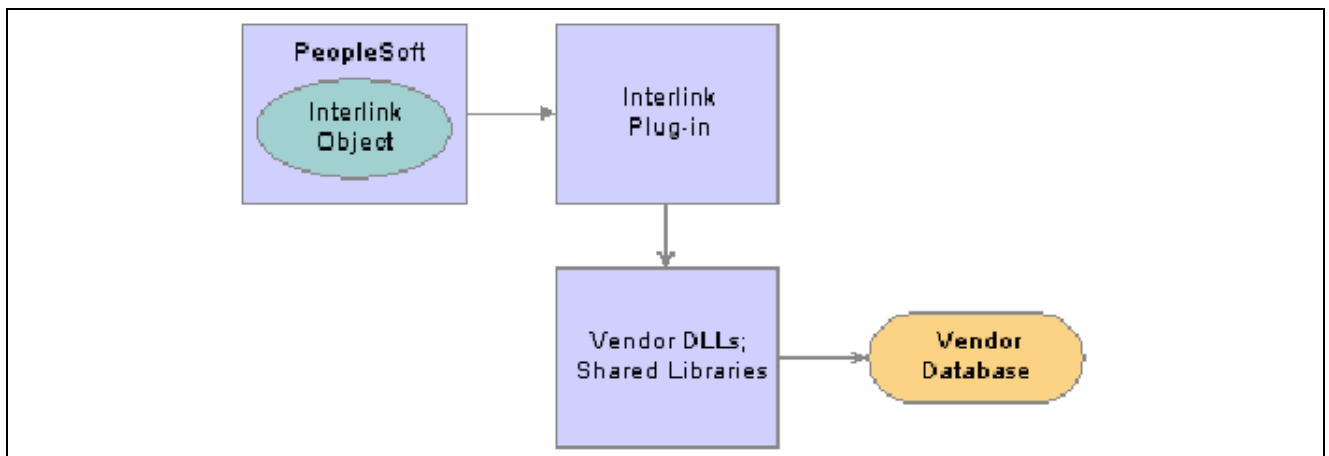
PeopleSoft OC delivers two business interlink objects to interact with Vertex and ADP Taxware for both on-line and batch transactions: VERTEX\_CALCTAX and TAXWARE\_CALCTAX.

All interlink objects must point to an interlink plug-in to function. As part of each interlink object setup, the parameter URL points to the interlink plug-in used to process transactions. For Vertex and ADP Taxware, this is set to point by default to the Windows dynamic link library delivered to PeopleSoft CRM customers by each tax vendor. For Vertex, this objects points to file://psbivrtx.dll. For Taxware, the object points to file://pstxwint.dll.

When running in a UNIX environment, the interlink architecture converts the name from a DLL to a UNIX shared library/shared object. This is true even though the interlink object definition points to a Windows DLL. The interlink architecture adds the prefix "lib" to the name, and then adds the appropriate extension for each particular UNIX platform to replace the DLL extension.

For example, the interlink architecture changes the Windows DLL file, psbivrtx.dll, to libpsbivrtx.sl prior to each call to the interlink plug-in.

The diagram below illustrates the interlink architecture flow:



Interlink Architecture flow

In the Interlink Architecture Flow diagram, the PeopleSoft box can represent a 2-tier client (now only used to run the PeopleSoft Application Designer), the application server, or the Process Scheduler server.

You can only perform 2-tier testing on a Microsoft Windows client running the PeopleSoft Application Designer. Use PeopleSoft Application Designer to open the interlink object definition and run the Interlink Tester.

Perform the setup instructions in the following tasks on each computer that you plan to use as an application server.

## Selecting Vendor Plug-in Locations

By default, PeopleSoft CRM looks for the interlink plug in the following directories:

Location	Mode
<PS_HOME>\bin\client\winx86\Interface Drivers	For 2-tier testing
<PS_HOME>\bin\server\<OS>\Interface Drivers where "OS" is your server's operating system	For the application server

These directories contain the XML script files that describe the interlink plug-in structure. The directories are also used to create the delivered interlink objects in PeopleSoft CRM. The XML script files have the same name as the windows DLL plug-in, except that the file extension "XML" is used instead of the "DLL" file extension.

When you purchase the Vertex software or the ADP Taxware software, each vendor provides the appropriate interlink plug-in that you must place in these directories. Although the copy under <PS\_HOME>\bin\client\winx86\InterfaceDrivers is not used in production, you can use this copy when testing initial connectivity in 2-tier mode by way of the interlink tester. The application server uses the plug-in copy in <PS\_HOME>\bin\server\<OS>\InterfaceDrivers.

For 2-tier testing, you can change the default interlink plug-in directory location in the Configuration Manager.

## Editing the Application Server Configuration File

The application server configuration file has the following entry. Use this entry to change the plug-in default location:

```
[ PSTOOLS ]
=====
; General settings for PSTOOLS
=====
;Uncomment this to specify an alternate directory to search for Interface Drivers.
;Business Interlink Driver Directory=
```

---

**Note.** If you are using or plan to use the Bulk Order feature of PeopleSoft OC, your Process Scheduler calculates the taxes for child orders. You must perform the same plug-in configuration on your Process Scheduler as you do for the Application Server.

---

## Task 5-2-1: Selecting Vendor DLLs and Shared Library Locations

Vendor-supplied DLLs or shared libraries can be placed in the following locations for each respective operating system:

- Microsoft Windows

Typically, the vendor DLLs should be placed in the same directory as the PeopleSoft CRM main executable file:

Location	Mode
<PS_HOME>\bin\client\winx86	For 2-tier testing
<PS_HOME>\bin\server\winx86	For Application Server and Process Scheduler Server

Vendor DLLs can also be placed in any directory that is in the PATH environment variable, which is accessible from the application server and the Process Scheduler server. This is also true when setting up a distributed interlink architecture.

- UNIX

Typically, you should place the vendor libraries in the same directory as the other PeopleSoft libraries. This directory is usually one of the directories pointed to by the LIBPATH environment variable that is set up in the psconfig.sh UNIX shell script: `<PS_HOME>/bin`.

---

**Note.** If the system cannot find the plug-in DLL/shared library or vendor supplied DLL/shared library, an error displays.

---

---

## Task 5-3: Installing ADP Taxware and Vertex Databases

This section discusses:

- Understanding the ADP Taxware and Vertex Database Installation
- Installing ADP Taxware
- Installing Vertex

### Understanding the ADP Taxware and Vertex Database Installation

Vertex Software and ADP Taxware provide installation instructions for their products for different operating systems and database formats. These can be as simple as creating ISAM files or as complex as creating and populating relational database tables. Check with your vendor contact for supported operating system platforms and database types and installation instructions.

---

**Note.** After you install the vendor software, you should test the software independent of the PeopleSoft CRM environment. Each tax vendor provides utilities for testing their software in this way. You must also provide a way for the vendor DLLs/shared libraries to find the location of the vendor database.

---

### Task 5-3-1: Installing ADP Taxware

To install ADP Taxware on the following operating systems:

- Microsoft Windows

ADP Taxware provides three INI files that you must set up to point to the location of the ADP Taxware database directories: AVPTAX.INI, AVPSTEP.INI, AVPZIP.INI. Place all three in the WINNT directory. Each file contains a set of pointer variables that you should point to the location where the ADP Taxware database files were placed during ADP Taxware software installation.

- UNIX

You must set up several environment variables in the psconfig.sh script of the PeopleSoft user who starts the application server and the Process Scheduler server. Define these variables and make them available to both the application server process and the Process Scheduler process. Directories should correspond to the location where you placed the ADP Taxware database files during ADP Taxware software installation.

### Task 5-3-2: Installing Vertex

To install Vertex on the following operating systems:

- Microsoft Windows

Vertex provides a registry file to populate entries in the Microsoft Windows registry.

- UNIX

Vertex provides a configuration file called PSVTXCFG that contains similar entries to the files in an NT registry. This file must be accessible to the vendor supplied Shared libraries. Place this file in the same location as the shared libraries `<PS_HOME>/lib`. You can also place this file in any directory as long as an environment variable called PSVTXCFG is defined in `psconfig.sh`, and is set to point to the location of the configuration file. The `psconfig.sh` file must be for the PeopleSoft CRM user on the UNIX box that starts the application server and the Process Scheduler server. Define the variable for both the application server process and the Process Scheduler process so that the Vertex software can use it.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlink*, "Business Interlinks for Application Developers."

---

## Task 5-4: Setting Up Integration of PeopleSoft Order Capture with ADP Taxware WorldTax

This section discusses:

- Understanding the ADP Taxware WorldTax Integration
- Integrating PeopleSoft Order Capture with ADP Taxware
- Testing the Integration

### Understanding the ADP Taxware WorldTax Integration

PeopleSoft OC integrates with ADP Taxware WorldTax to calculate value-added tax (VAT). This integration utilizes PeopleSoft Business Interlink technology.

PeopleSoft OC makes a synchronous, XML-based call containing the order information (such as products, customers, pricing, and so on) to ADP Taxware WorldTax, and then calculates the appropriate VAT amount and returns it to PeopleSoft CRM. These VAT amounts display on the order.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlink*, "Business Interlinks for Application Developers."

### Task 5-4-1: Integrating PeopleSoft Order Capture with ADP Taxware

To integrate PeopleSoft OC with ADP Taxware WorldTax:

1. Verify that ADP Taxware WorldTax, System 2.5 is installed and operating correctly.  
For information, refer to the UTL2-1-2.pdf on the ADP Taxware WorldTax CD for installation instructions.
2. Verify that the Sun Microsystems Java environment is installed and running on your application server.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlinks*, "Setting Up A Business Interlink Runtime Plug-In."

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlinks*, "Setting up the Development Environment in Java."

3. Ensure `psinterlinks.jar` is referenced in the CLASSPATH.

See *PeopleSoft Enterprise PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide*, "Setting Up A Business Interlink Runtime Plug-In."

4. Copy the *taxcommon.class* from ADP Taxware WorldTax system that you installed in your environment to your `<PS_HOME>\class` directory.

For more information, refer to the UTL2-1-2.pdf on the ADP Taxware WorldTax CD for installation instructions.

5. Extract *crm\_psoci\_worldtax.class* from the clear case of your installation and copy it to the `<PS_HOME>\class` directory.

This is the java class file that Oracle has developed to integrate with the ADP Taxware Worldtax system. Copy *crm\_psoci\_worldtax.xml* to the following two directories:

- `<PS_HOME>\bin\client\winx86\interfacedrivers`
- `<PS_HOME>\bin\server\winx86\interfacedrivers`

6. Configure the business interlink as a WebApp on IBM WebSphere.

See *PeopleSoft Enterprise PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide*, "Configuring PSINTERLINKS as a WebApp on WebSphere."

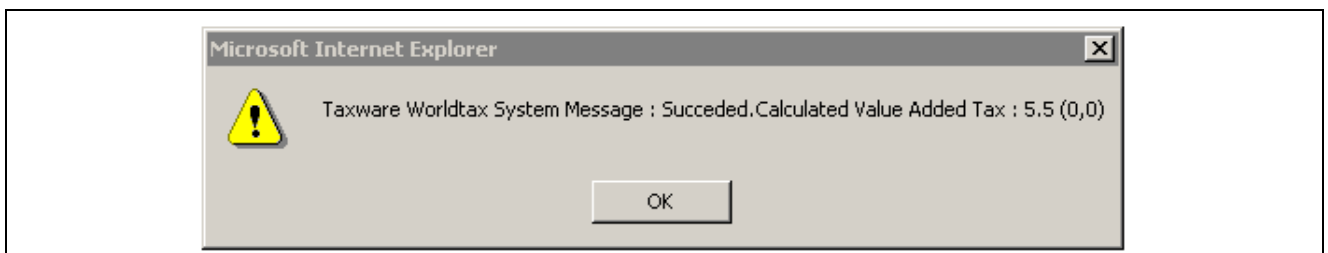
## Task 5-4-2: Testing the Integration

After integrating PeopleSoft OC with ADP Taxware, as instructed in the previous section, use the following steps to test the business interlink:

To test the business interlink:

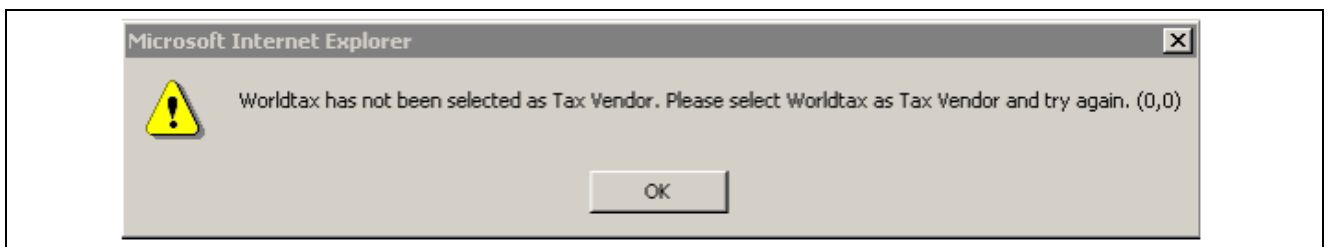
1. From the PeopleSoft CRM menu, select Set Up CRM, Business Unit Related, Order Capture Definition.
2. Select *WorldTax* from the Tax Vendor drop-down list box, and then click the Test WorldTax Interlink button.

If the environment is set up correctly, the following success message displays:



Taxware Worldtax success message

3. If you do not select *WorldTax* from the Tax Vendor drop-down and click the Test Worldtax Interlink button, the following error message displays:



Worldtax system error message





## CHAPTER 6

# Integrating PeopleSoft CRM 9 with PeopleSoft HRMS 9 to Access the HRHD Worker 360-Degree View

This chapter discusses:

- Understanding PeopleSoft CRM 9 and PeopleSoft HRMS 9 Integration
- Prerequisites
- Setting up the PeopleSoft HCM 9 Database
- Setting Up the PeopleSoft CRM 9 Database

---

## Understanding PeopleSoft CRM 9 and PeopleSoft HRMS 9 Integration

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). The EIP enables access to the PeopleSoft Enterprise HelpDesk for Human Resources (HRHD) Worker 360-Degree View from PeopleSoft Enterprise CRM.

Ensure that you have the latest updates for the PeopleSoft Enterprise PeopleTools 8.4x Installation Instructions for your database platform for both the PeopleSoft Enterprise CRM and PeopleSoft Enterprise HRMS applications.

---

## Prerequisites

Before you can begin the PeopleSoft CRM and PeopleSoft HRMS integration tasks in this chapter, you must complete these requirements:

- Install and configure a PeopleSoft CRM 9 database.
- Install and configure a PeopleSoft HRMS 9 database.

## Task 6-1: Setting up the PeopleSoft HCM 9 Database

### Task 6-1-1: Accessing the PeopleSoft CRM Local Node Definition

In the following examples, CR900EI2 is the PeopleSoft CRM 9 local node.

To set up the PeopleSoft HCM 9 Database:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the CRM local node (for example, CR900EI2).
2. Select the Node Definitions tab to access the Node Definitions page.
3. Complete the Node Definitions page as specified in the following example:

The screenshot displays the 'Node Definitions' page in the PeopleSoft interface. The 'Node Name' is set to 'CR900EI2' and the 'Description' is 'CR900EI2 EIP remote node'. The 'Node Type' is 'PIA'. The 'Authentication Option' is 'Password'. The 'Password' field is masked with dots. The 'Default User ID' is 'VP1'. There are search icons next to the 'Hub Node', 'Master Node', 'Image Name', and 'Code Set Group Name' fields. On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the main form, there are checkboxes for 'Default Local Node', 'Local Node', 'Active Node' (which is checked), 'Non-Repudiation', and 'Segment Aware'. At the bottom, there are 'Save' and 'Return to Search' buttons, and a navigation bar with links to 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'.

Node Definitions page

- a. In the Node Type field, select *PIA* (PeopleSoft Pure Internet Architecture) from the drop-down list.
- b. In the Authentication Option field, select either *No Authentication* or *Password Authentication* from the drop-down list.

**Note.** For the *Authentication* option, you can select either *No Authentication* or *Password Authentication*. If you select *Password Authentication*, you must define the same node password in both the PeopleSoft CRM and PeopleSoft HCM databases. The default password is *PSOFT*.

4. Select the Connectors tab to access the Connectors page.

Node Definitions Connectors Portal WS Security Routings

Node Name CR900EI2 Ping Node

Details

Gateway ID LOCAL

Connector ID PSFTTARGET

PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)

This connector does not have properties. Use Gateways Page to setup.

Save Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Connectors page

5. Click the Gateway Setup Properties link to access the Gateway Properties page. Ensure that there is a row for CR900EI2 and that it contains the correct URL for that database.
6. Click the Save button to save your changes.

## Task 6-1-2: Accessing the PeopleSoft HCM Local Node Definition

In the following examples, H900R20B is the PeopleSoft HCM 9 local node.

To access the PeopleSoft HCM local node definition:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the HCM local node (for example, H900R20B).
2. Select the Node Definitions tab to access the Node Definitions page.
3. Complete the Node Definitions page as specified in the following example:

**Node Definitions** | Connectors | Portal | WS Security | Routings

**Node Name:** H900R20B Copy Node

**\*Description:** PS HRMS - Local Node Rename Node

**Node Type:** PIA ☒ Default Local Node  
☒ Local Node  
☒ Active Node  
☐ Non-Repudiation  
☐ Segment Aware

**\*Authentication Option:** Password

**Password:** .....

**\*Default User ID:** PS

**Hub Node:**

**Master Node:**

**Company ID:**

**IB Throttle Threshold:**

**Image Name:**

**Code Set Group Name:**

[Contact/Notes](#) [Properties](#)

Save Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Node Definitions page

- In the Node Type field, select *PIA* (PeopleSoft Pure Internet Architecture) from the drop-down list.
- In the Authentication Option field, select either *No Authentication* or *Password Authentication* from the drop-down list.

**Note.** For the *Authentication* option, you can select either *No Authentication* or *Password Authentication*. If you select *Password Authentication*, you must define the same node password in both the PeopleSoft CRM and PeopleSoft HCM databases. The default password is *PSOFT*.

- Select the Connectors tab to access the Connectors page.

**Node Definitions** | **Connectors** | Portal | WS Security | Routings

**Node Name** H900R20B Ping Node

**Details**

**Gateway ID** LOCAL

**Connector ID** PSFTTARGET

PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)

This connector does not have properties. Use Gateways Page to setup.

Save Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Connectors page

- Click the Gateway Setup Properties link to access the Gateway Properties page. Ensure that there is a row for H900R20B and that it contains the correct URL for that database.
- Click the Save button to save your changes.

### Task 6-1-3: Adding PeopleSoft CRM Trusted Node for Single Signon

To add the PeopleSoft CRM trusted node to enable PeopleSoft Single Signon:

- Select Home, PeopleTools, Security, Security Objects, Single Signon.

The PeopleSoft Single Signon page appears.

Single Signon				
Authentication Token expiration time				
Expiration Time in minutes:		720	Valid values are 1 - 10,000	
Trust Authentication Tokens issued by these Nodes				
Message Node Name	Description	Local Node		
CR900EI2	CR900EI2 EIP remote node		+	-
H900R20B	PS HRMS - Local Node	1	+	-

Single Signon page

- Add a row for the PeopleSoft CRM local node.

For example, *CR900EI2*.

- Click Save.

### Task 6-1-4: Accessing HD\_360\_REQUEST\_SYNC Service Operation

To access the HD\_360\_REQUEST\_SYNC Service Operation:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operation, and then search for service operation HD\_360\_REQUEST\_SYNC.
- Select the Node Definitions tab to access the Node Definitions page.

**Service Operation:** HD\_360\_REQUEST\_SYNC  
**Service:** HD\_360\_REQUEST\_SYNC  
**Operation Type:** Synchronous  
**Operation Description:** HR Helpdesk Request ☐ User/Password Required  
**Operation Comments:**   
**Object Owner ID:** Call Center   
**Operation Alias:** [Service Operation Security](#)

**Default Service Operation Version**  
**Version:** VERSION\_2 ☒ **Default** ☒ **Active**  
**Version Description:** HR Helpdesk Request  
**Version Comments:**   
☐ Non-Repudiation  
☐ Runtime Schema Validation  
[Introspection](#)  
[Add Fault Type](#)

**Routing Status**  
**Any-to-Local:** Does not exist  
**Local-to-Local:** Does not exist  
**Routing Actions Upon Save**  
☐ Generate Any-to-Local  
☐ Generate Local-to-Local

**Message Information**  
**Type:** Request  
**Message.Version:** HD\_360\_REQUEST\_SYNC.VERSION\_2 [View Message](#)  
**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_2 [View Message](#)

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)  

Version	Description	Active
VERSION_1	HR Helpdesk Request	<input type="checkbox"/>

[Save](#) [Return to Search](#) [Add Version](#)

Node Definitions page

3. In the Default Service Operation Version section, select the Active check box.
4. Click the Save button to save your changes.
5. From here you can select the Handlers tab to access the Handlers page.

General Handlers Routings

Service Operation: HD\_360\_REQUEST\_SYNC

Default Version: VERSION\_2

Operation Type: Synchronous

Name	Type	Implementation	Status			
REQUESTHDLR	OnRequest	Application Class	Active	Details	+	-

Handlers page

6. In the Status column for the REQUESTHDLR row, select *Active* from the drop-down list and then click Save.

## Task 6-1-5: Adding a PeopleSoft CRM Active Routing for Version 2

To add an active routing for version 2 for the PeopleSoft CRM database:

1. Select Home, PeopleTools, Integration Broker, Integration Setup, Routings.

The Routing Definitions Search page appears.

2. Click the Add a New Value tab.
3. In the Routing Name field, enter *HD360\_VERSION2*.
4. Click the Add button.

The Routing Definitions page for HD360\_VERSION2 appears.

5. Complete the Routing Definitions page as specified in the following example:

**Routing Definitions** | **Parameters**

**Routing Name:** HD360\_VERSION2 ☒ **Active**

**\*Service Operation:** HD\_360\_REQUEST\_SYNC ☐ **System Generated**

**Version:** VERSION\_2

**\*Description:** HD360\_VERSION2

**Comments:**

**\*Sender Node:** CR900EI2

**\*Receiver Node:** H900R20B

**Routing Type:** Synchronous ☐ **User Exception**

**Object Owner ID:** 360 Degree View

**\*Log Detail:** Header and Detail

**Save**

[Routing Definitions](#) | [Parameters](#)

Routing Definitions page

- a. In the Description field, enter *HD360\_VERSION2*.

---

**Note.** The Sender Node populates as the CRM local node (CR900EI2), and the Receiver Node populates as the HCM local node (H900R20B).

---

- b. In the Object Owner ID field, select *360 Degree View* from the drop-down list.
  - c. In the Log Detail field, select *Header and Detail* from the drop-down list.
  - d. Select the Active check box.
  - e. Click the Save button to save your changes.
6. Select the Parameters tab to access the Parameters page.
  7. Complete the Parameters page as specified in the following example:



<b>Routing Name:</b>	HD360_VERSION2
<b>Service Operation:</b>	HD_360_REQUEST_SYNC
<b>Service Operation Version:</b>	VERSION_2

Parameters	
<b>Type:</b>	Inbound Request
<b>External Alias:</b>	HD_360_REQUEST_SYNC.VERSION_2
	<a href="#">Alias References</a>
<b>Message.Ver into Transform 1:</b>	<input type="text"/>
<b>Transform Program 1:</b>	<input type="text"/>
<b>Transform Program 2:</b>	<input type="text"/>
<b>Message.Ver out of Transforms:</b>	<input type="text"/>

<b>Type:</b>	Outbound Response
<b>External Alias:</b>	HD_360_RESPONSE_SYNC.VERSION_2
	<a href="#">Alias References</a>
<b>Message.Ver into Transform 1:</b>	<input type="text"/>
<b>Transform Program 1:</b>	<input type="text"/>
<b>Transform Program 2:</b>	<input type="text"/>
<b>Message.Ver out of Transforms:</b>	<input type="text"/>

Node Definitions page

- For Inbound Request in the External Alias field, enter *HD\_360\_REQUEST\_SYNC.VERSION\_2*
- For Outbound Request in the External Alias field, enter *HD\_360\_REQUEST\_SYNC.VERSION\_2*
- Click the Save button to save your changes.

**Note.** There are no transformations because the PeopleSoft CRM database is sending over Version 2 of the message and the PeopleSoft HCM database is expecting Version 2 of the message.

The Routings tab on the service operation should now show this new routing as *Active*, and any other routings should show as *Inactive*.

## Task 6-1-6: Running Row Level Security in PeopleSoft HCM

To run the row level security process in the PeopleSoft HCM database:

- Select Home, Setup HRMS, Security, Core Row Level Security, and then Refresh SJT\_OPR\_CLS.
- Select any existing Run Control ID, or create a new one.
- Select the Refresh All Routings check box and then run the process.

4. Ensure that the process runs and displays a message of *Success* in the process monitor.

## Task 6-2: Setting Up the PeopleSoft CRM 9 Database

### Task 6-2-1: Accessing the PeopleSoft CRM Local Node Definition

To access the PeopleSoft CRM local node definition:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the CRM local node (for example, CR900EI2).
2. Select the Node Definitions tab to access the Node Definitions page.
3. Complete the Node Definitions page as in the following example:

The screenshot displays the 'Node Definitions' page in the PeopleSoft CRM 9 interface. The page has a tabbed header with 'Node Definitions' selected. The main form contains the following fields and controls:

- Node Name:** CR900EI2
- Description:** PSFT CRM - Local Node
- Node Type:** PIA
- Authentication Option:** Password (selected from a drop-down menu)
- Password:** A masked password field (dots).
- Default User ID:** VP1
- Hub Node:** Empty text field with a search icon.
- Master Node:** Empty text field with a search icon.
- Company ID:** Empty text field.
- IB Throttle Threshold:** Empty text field.
- Image Name:** Empty text field with a search icon.
- Code Set Group Name:** Empty text field with a search icon.
- Checkboxes:**
  - ☒ Default Local Node
  - ☒ Local Node
  - ☒ Active Node
  - ☐ Non-Repudiation
  - ☐ Segment Aware
- Buttons:** Copy Node, Rename Node, Save, and Return to Search.
- Links:** Contact/Notes and Properties.

Node Definitions page

- a. In the Authentication Option field, select *Password* from the drop-down list.

**Note.** Any nodes with an Authentication Option of Password must have the same password across PeopleSoft CRM and PeopleSoft HCM. The default password is *PSOFT*.

- b. In the Password field, enter a password.
- c. Click the Save button to save your changes.
4. Select the Connectors tab to access the Connectors page.

The screenshot shows the 'Connectors' tab in the PeopleSoft interface. The 'Node Name' is 'CR900EI2'. Below the 'Details' section, there are two input fields: 'Gateway ID' with the value 'LOCAL' and 'Connector ID' with the value 'PSFTTARGET'. To the right of these fields is a message: 'PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)'. Below the message is a note: 'This connector does not have properties. Use Gateways Page to setup.' At the bottom of the form are two buttons: 'Save' and 'Return to Search'. The breadcrumb trail at the bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Connectors page

5. In the Connector ID field, verify that *PSFTTARGET* is selected.
6. Click the Gateway Setup Properties link to access and set up the Gateway Properties as necessary.
7. Click the Save button to save your changes.

## Task 6-2-2: Accessing the PeopleSoft HCM Local Node Definition

To access the PeopleSoft HCM local node definition:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the HCM local node.
2. Select the Node Definitions tab to access the Node Definitions page.
3. Complete the Node Definitions page as in the following example:

**Node Definitions** | Connectors | Portal | WS Security | Routings

**Node Name:** H900R20B

**\*Description:** H900R20B EIP remote node

**\*Node Type:** PIA

**\*Authentication Option:** Password

**Password:** .....

**\*Default User ID:** PS

**Hub Node:**

**Master Node:**

**Company ID:**

**IB Throttle Threshold:**

**Image Name:**

**Code Set Group Name:**

☐ Default Local Node

☐ Local Node

☒ Active Node

☐ Non-Repudiation

☐ Segment Aware

[Copy Node](#)

[Rename Node](#)

[Delete Node](#)

[Contact/Notes](#) [Properties](#)

[Save](#) [Return to Search](#)

Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions page

- a. In the Authentication Option field, select *Password* from the drop-down list.

**Note.** Any nodes with an Authentication Option of Password must have the same password across PeopleSoft CRM and PeopleSoft HCM. The default password is *PSOFT*.

- b. In the Password field, enter a password.
  - c. Click the Save button to save your changes.
4. Select the Connectors tab to access the Connectors page.

**Node Definitions** | **Connectors** | Portal | WS Security | Routings

**Node Name** H900R20B [Ping Node](#)

**Details**

**Gateway ID** 899B

**Connector ID** PSFTTARGET

[PeopleSoft Nodes are configured via the Gateway Setup Properties](#)

This connector does not have properties. Use Gateways Page to setup.

[Save](#) [Return to Search](#)

Node Definitions | Connectors | Portal | WS Security | Routings

Connectors page

5. In the Connector ID field, verify that *PSFTTARGET* is selected.
6. Click the Gateway Setup Properties link to access and set up the Gateway Properties as necessary.

- Click the Save button to save your changes.

### Task 6-2-3: Adding PeopleSoft HCM Trusted Node for PeopleSoft Single Signon

To add the PeopleSoft HCM trusted node to enable PeopleSoft Single Signon:

- Select Home, PeopleTools, Security, Security Objects, Single Signon.

The PeopleSoft Single Signon page appears.

Message Node Name	Description	Local Node
CR900E12	PSFT CRM - Local Node	1
H900R20B	H900R20B EIP remote node	

Single Signon page

- Add a row for the PeopleSoft HCM local node.

For example, *H900R20B*.

- Click Save.

### Task 6-2-4: Activating Service Operations

To activate service operations:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operation, and then search for service operation HD\_360\_REQUEST\_SYNC.
- Select the General tab to access the General page.

The screenshot shows the 'General' tab of the 'Routing Definitions' page. The 'Service Operation' is 'HD\_360\_REQUEST\_SYNC', 'Service' is 'HD\_360\_REQUEST\_SYNC', and 'Operation Type' is 'Synchronous'. The '\*Operation Description' is 'HR Helpdesk Message'. The 'Object Owner ID' is '360 Degree View'. The 'Default Service Operation Version' section shows 'VERSION\_2' as the default and active version, with a description of 'HR Helpdesk'. The 'Routing Status' section shows 'Any-to-Local' and 'Local-to-Local' both as 'Does not exist'. The 'Routing Actions Upon Save' section shows 'Generate Any-to-Local' and 'Generate Local-to-Local' as unchecked options. The 'Message Information' section shows two messages: 'Request' with 'Message.Version' 'HD\_360\_REQUEST\_SYNC.VERSION\_2' and 'Response' with 'Message.Version' 'HD\_360\_RESPONSE\_SYNC.VERSION\_2'. The 'Non-Default Versions' table at the bottom shows 'VERSION\_1' with description 'HR Helpdesk Message' and an 'Active' checkbox.

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

3. In the Default Service Operation Version section, verify that the Active check box is selected.
4. Click the Save button to save your changes.

## Task 6-2-5: Adding a PeopleSoft HCM Active Routing for Version 2

To add an active routing for version 2 for the PeopleSoft HCM database:

1. Select Home, PeopleTools, Integration Broker, Integration Setup, Routings.  
The Routing Definitions Search page appears.
2. Click the Add a New Value tab.
3. In the Routing Name field, enter *HD360\_VERSION2*.
4. Click the Add button.  
The Routing Definitions page for HD360\_VERSION2 appears.

5. Complete the Routing Definitions page as specified in the following example:

The screenshot shows the 'Routing Definitions' page with the following values:

- Routing Name:** HD360\_VERSION2
- Active:** ☒
- System Generated:** ☐
- \*Service Operation:** HD\_360\_REQUEST\_SYNC
- Version:** VERSION\_2
- \*Description:** HD360\_VERSION2
- Comments:** (Empty text area)
- \*Sender Node:** CR900EI2
- \*Receiver Node:** H900R20B
- Routing Type:** Synchronous
- User Exception:** ☐
- Object Owner ID:** 360 Degree View
- \*Log Detail:** Header and Detail
- Save:** (Yellow button)
- Navigation:** [Routing Definitions](#) | [Parameters](#)

Routing Definitions page









- a. In the Description field, enter *HD360\_VERSION2*.

**Note.** The Sender Node populates as the CRM local node (CR900EI2), and the Receiver Node populates as the HCM local node (H900R20B).

- In the Object Owner ID field, select *360 Degree View* from the drop-down list.
  - In the Log Detail field, select *Header and Detail* from the drop-down list.
  - Select the Active check box.
  - Click the Save button to save your changes.
- Select the Parameters tab to access the Parameters page.
  - Complete the Parameters page as specified in the following example:

<b>Routing Name:</b>	HD360_VERSION2
<b>Service Operation:</b>	HD_360_REQUEST_SYNC
<b>Service Operation Version:</b>	VERSION_2

Parameters	
<b>Type:</b>	Inbound Request
<b>External Alias:</b>	HD_360_REQUEST_SYNC.VERSION_2 <a href="#">Alias References</a>
<b>Message.Ver into Transform 1:</b>	<input type="text"/> 
<b>Transform Program 1:</b>	<input type="text"/> 
<b>Transform Program 2:</b>	<input type="text"/> 
<b>Message.Ver out of Transforms:</b>	<input type="text"/> 
<hr/>	
<b>Type:</b>	Outbound Response
<b>External Alias:</b>	HD_360_RESPONSE_SYNC.VERSION_2 <a href="#">Alias References</a>
<b>Message.Ver into Transform 1:</b>	<input type="text"/> 
<b>Transform Program 1:</b>	<input type="text"/> 
<b>Transform Program 2:</b>	<input type="text"/> 
<b>Message.Ver out of Transforms:</b>	<input type="text"/> 

Node Definitions - Parameters page

- For Inbound Request in the External Alias field, enter *HD\_360\_REQUEST\_SYNC.VERSION\_2*
- For Outbound Request in the External Alias field, enter *HD\_360\_REQUEST\_SYNC.VERSION\_2*
- Click the Save button to save your changes.

**Note.** There are no transformations because the PeopleSoft CRM database is sending over Version 2 of the message and the PeopleSoft HCM database is expecting Version 2 of the message.

The Routings tab on the service operation should now show this new routing as *Active*, and any other routings should show as *Inactive*.

This completes the PeopleSoft CRM 9 integration setup with PeopleSoft HCM 9.



## CHAPTER 7

# Integrating PeopleSoft CRM 9 with PeopleSoft HRMS 8.8 SP1 or HRMS 8.9 to Access the HRHD Worker 360-Degree View

This chapter discusses:

- Understanding the Integration of PeopleSoft CRM 9 with PeopleSoft HRMS 8.8 SP1 or HRMS 8.9 to Access the HRHD Worker 360-Degree View
- Prerequisites
- Setting Up the URL Gateway for PeopleSoft CRM and PeopleSoft HRMS
- Setting Up a Connector ID for PeopleSoft CRM and PeopleSoft HRMS Nodes
- Setting Up PeopleSoft Single Signon
- Pinging the PeopleSoft CRM and PeopleSoft HRMS Nodes
- Activating the Message Channel or Queue
- Activating the HR\_HELPDESK\_360 EIP Messages
- Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.8
- Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.9
- Setting Up Portal Content Links
- Activating the Link Category Definition in PeopleSoft CRM for Integration with PeopleSoft HCM 8.8

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## Understanding the Integration of PeopleSoft CRM 9 with PeopleSoft HRMS 8.8 SP1 or HRMS 8.9 to Access the HRHD Worker 360-Degree View

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). The EIP enables access to the PeopleSoft Enterprise HelpDesk for Human Resources (HRHD) Worker 360-Degree View from PeopleSoft CRM.

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**Note.** Before proceeding with your installation, consult Oracle's PeopleSoft Customer Connection website to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools Installation guide for your database platform for both the PeopleSoft CRM and PeopleSoft HRMS applications.

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**Note.** In addition, consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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## See Also

"Integrating PeopleSoft CRM 9 with PeopleSoft HRMS 8.3 SP1 to Access the HRHD Worker 360-Degree View."

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## Prerequisites

Before you can begin the PeopleSoft CRM and PeopleSoft HRMS integration tasks in this chapter, you must complete these requirements:

1. Install and configure a PeopleSoft CRM 9 database.
2. Install and configure a PeopleSoft HRMS 8.8 SP1 *or* a PeopleSoft HRMS 8.9 database.

---

## Task 7-1: Setting Up the URL Gateway for PeopleSoft CRM and PeopleSoft HRMS

A URL gateway must be set up in the PeopleSoft CRM and PeopleSoft HRMS systems. In addition, PSFT\_CR delivers as a local node on PeopleSoft CRM, and PSFT\_HR delivers as a local node on PeopleSoft HRMS. The gateway URL defines these two nodes in a gateway property file. In PeopleSoft HRMS, you must create a gateway for the PeopleSoft CRM database.

---

**Note.** It is not mandatory that you use the delivered PSFT\_CR and PSFT\_HR nodes. You can define any local node as a URL gateway. If you use another node, instead of PSFT\_CR and PSFT\_HR nodes, substitute the nodes that you selected for PSFT\_CR and PSFT\_HR in the following directions.

---

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*, "Managing Integration Gateways."

---

**Note.** PeopleSoft CRM is on PeopleSoft PeopleTools release 8.48 and above, PeopleSoft HCM is on PeopleSoft PeopleTools release 8.46 (HRMS 8.9) or 8.44 (HRMS 8.8 SP1). The following table provides the location of the gateway property file for various configurations. This is only applicable to PeopleSoft HRMS on PeopleSoft PeopleTools version *below* 8.48. If PeopleSoft HRMS is on PeopleSoft PeopleTools 8.48 and above, the property file modification is not required.

---

This table provides the location of the gateway property file for various configurations for PeopleSoft HRMS on PeopleSoft PeopleTools version *below* 8.48:

PeopleSoft Enterprise Product Application	Application Server	Gateway URL Directory
HRMS 8.8 SP1 and HRMS 8.9 on PeopleTools releases prior to 8.47	BEA WebLogic	C:\bea\wlserver61\config\PeopleSoft\Applications\PSIGW\Web-Inf\IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9 on PeopleTools 8.47 and later	BEA WebLogic	<%PS_HOME%>\webserver\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9	IBM WebSphere	C:\WebSphere\AppServer\installedApps\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9	Oracle Application Server	\$ORACLE_HOME/j2ee/<component_name>/applications/<application_name>/PSIGW/WEB-INF

This is an example of a properties file with two nodes defined. You must modify the files on the PeopleSoft HRMS system to have two nodes defined with the following information:

```
#
# Replace $NODENAME with the exact name used for that Node.
# Replace information shown in <> with the correct information for your Node
(remove the <> as well)
#
# If a Non-Default Node is required the following settings should be uncommented.
#
ig.isc.PSFT_HR.serverURL=//adntas72:9350
ig.isc.PSFT_HR.userid=PS
ig.isc.PSFT_HR.password=8T+SA8zGqEM=
ig.isc.PSFT_HR.toolsRel=8.42-MC3

ig.isc.PSFT_CR.serverURL=//adntas41:8050
ig.isc.PSFT_CR.userid=VP1
ig.isc.PSFT_CR.password=JekncVtPdNg=
ig.isc.PSFT_CR.toolsRel=8.45
```

The passwords in the property file must be encrypted using PSCipher. To run on Microsoft Windows, ensure that Sun Java is in your system environment path.

**Note.** Run PSCipher.bat on each PeopleSoft PeopleTools installation location. For the IBM WebSphere web server *only*: Run the setupcmdline.bat before executing PSCipher.bat to ensure that Java is set properly. To identify the PeopleSoft PeopleTools release (toolsRel), see the PSSTATUS record.

- For PeopleSoft HRMS 8.8 SP1 and PeopleSoft HRMS 8.9 on a BEA WebLogic web server, the command is located on the BEA WebLogic home directory under config\peoplesoft.

The command returns the encrypted password when you input an original password. Copy and paste the encrypted password into the gateways properties file. In this example, the encrypted password is shown in bold:

```
C:\bea\wlserver6.1\config\peoplesoft>PSCipher COMPACT  
8T+SA8zGqEM=
```

- For PeopleSoft HRMS 8.8 SP1 and PeopleSoft HRMS 8.9 with IBM WebSphere, the location of the command is:

```
C:\websphere\appserver\installedapps\peoplesoft\
```

---

**Note.** The PSCipher password-encryption utilities generates different passwords depending on the PeopleSoft PeopleTools release. PeopleSoft HRMS uses the one delivered by it's PeopleSoft PeopleTools release. Ensure that you have the correct release.

---

For PeopleSoft CRM on PeopleSoft PeopleTools 8.48 and above, Oracle uses Integration Broker to specify the gateway URL. For PeopleSoft HCM on PeopleSoft PeopleTools 8.48 and above, instead of editing the IntegrationGateway.Properties file, Oracle uses the same gateway URL to set up the connection.

To set up the URL for the PeopleSoft CRM system:

1. In the PeopleSoft CRM system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.
2. Search for and select LOCAL gateway.

The Gateways page appears.

3. Enter the Gateway URL on the Gateways page:

```
http://<webserver_machine_name><port>/PSIGW/PeopleSoftListeningConnector.
```

The value that you enter for <webserver\_machine\_name><port> depends on the machine you set up to access the integration gateway properties file that has been edited as described above to define two nodes. The <port> value should be an HTTP port.

4. Click Save, and then click OK for the No Connectors detected dialog box.
5. Click the Load Gateway Connector button.

You will receive the message *Gateway refresh process was successful.*

6. Click OK.
7. Click Save.

The information on the Gateways page should be similar to what is shown in the following example of the Gateways page.

**Gateways**

Gateway ID: LOCAL

☒ Local Gateway ☐ Load Balancer

URL:

[Gateway Setup Properties](#)

**Connectors** Customize | Find |  First  Last

	*Connector ID	Description	*Connector Class Name		
1	AS2TARGET		AS2TargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
2	FILEOUTPUT		SimpleFileTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
3	FTPTARGET		FTPTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
4	GETMAILTARGET		GetMailTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
5	HTTPTARGET		HttpTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
6	JMSTARGET		JMSTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
7	LDAPTARGET		LDAPTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
8	PSFT81TARGET		ApplicationMessagingTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
9	PSFTTARGET		PeopleSoftTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>
10	SMTPTARGET		SMTPTargetConnector	<a href="#">Properties</a>	<a href="#">+</a> <a href="#">-</a>

Example of Gateways page

To set up the gateway in the PeopleSoft HRMS system with PeopleSoft PeopleTools release 8.48 and above:

1. In the PeopleSoft HRMS system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.
2. Search for and select LOCAL gateway.

The Gateways page appears.

**Gateways**

Gateway ID: LOCAL

☒ Local Gateway ☐ Load Balancer

URL:

[Gateway Setup Properties](#)

**Connectors** Customize | Find | First 1-10 of 10 Last

	*Connector ID	Description	*Connector Class Name		
1	AS2TARGET		AS2TargetConnector	Properties	+ -
2	FILEOUTPUT		SimpleFileTargetConnector	Properties	+ -
3	FTPTARGET		FTPTargetConnector	Properties	+ -
4	GETMAILTARGET		GetMailTargetConnector	Properties	+ -
5	HTTPTARGET		HttpTargetConnector	Properties	+ -
6	JMSTARGET		JMSTargetConnector	Properties	+ -
7	LDAPTARGET		LDAPTargetConnector	Properties	+ -
8	PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+ -
9	PSFTTARGET		PeopleSoftTargetConnector	Properties	+ -
10	SMTPTARGET		SMTPTargetConnector	Properties	+ -

Gateways page

3. Enter the Gateway URL on the Gateways page:

`http://<webserver_machine_name><port>/PSIGW/PeopleSoftListeningConnector`.

The value that you enter for `<webserver_machine_name><port>` depends on the machine you set up to access the integration gateway properties file that has been edited as described above to define two nodes. The `<port>` value should be an HTTP port.

4. Click Save.
5. Click the Load Gateway Connector button.

You will receive the message *Gateway refresh process was successful*.

6. Click OK.
7. Click Save.

After the gateway loads, click the Gateway Setup Properties link to access the Gateway Property page. Specify both PeopleSoft CRM and PeopleSoft HRMS nodes information and click Save. You must do this in the PeopleSoft CRM and the PeopleSoft HRMS systems that are on PeopleSoft PeopleTools 8.48 and above.

## See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Managing Integration Gateways"*

## Task 7-2: Setting Up a Connector ID for PeopleSoft CRM and PeopleSoft HRMS Nodes

This section discusses:

- Defining a Connector ID for the PeopleSoft CRM Nodes in the PeopleSoft CRM System
- Defining a Connector ID for the PeopleSoft HRMS Nodes in the PeopleSoft HRMS System

## Task 7-2-1: Defining a Connector ID for the PeopleSoft CRM Nodes in the PeopleSoft CRM System

You must set up a connector ID as PSFTTARGET for the PSFT\_CR and PSFT\_HR nodes in the PeopleSoft CRM system.

To define a PSFTTARGET connector ID for the PeopleSoft CRM nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes in the PeopleSoft CRM system.
2. Specify the PSFT\_CR node (local node).
3. In the Node Definitions component, select the Connectors tab.

The screenshot shows the 'Node Definitions' component with the 'Connectors' tab selected. The 'Node Name' is 'PSFT\_CR'. There is a 'Ping Node' button. Under the 'Details' section, the 'Gateway ID' is set to 'LOCAL' and the 'Connector ID' is set to 'PSFTTARGET'. A message states: 'PeopleSoft Nodes are configured via the Gateway Setup Properties'. Below this, it says: 'This connector does not have properties. Use Gateways Page to setup.' At the bottom, there are 'Save' and 'Return to Search' buttons. The breadcrumb trail at the bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions - Connectors page

4. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
5. Click Save.
6. Repeat the procedure for the PSFT\_HR node (remote node).

The screenshot shows the 'Node Definitions' component with the 'Connectors' tab selected. The 'Node Name' is 'PSFT\_HR'. There is a 'Ping Node' button. Under the 'Details' section, the 'Gateway ID' is set to 'LOCAL' and the 'Connector ID' is set to 'PSFTTARGET'. A message states: 'PeopleSoft Nodes are configured via the Gateway Setup Properties'. Below this, it says: 'This connector does not have properties. Use Gateways Page to setup.' At the bottom, there are 'Save' and 'Return to Search' buttons. The breadcrumb trail at the bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions - Connectors page

7. Click Save.

## Task 7-2-2: Defining a Connector ID for the PeopleSoft HRMS Nodes in the PeopleSoft HRMS System

You must set up a connector ID as PSFTTARGET for the PSFT\_CR and PSFT\_HR nodes in the PeopleSoft HRMS system.

To define a PSFTTARGET connector ID for the PeopleSoft CRM nodes:

1. Verify that a gateway has been created for accessing the PeopleSoft CRM database.  
See Setting Up the URL Gateway for PeopleSoft CRM and PeopleSoft HRMS.
2. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in the PeopleSoft CRM system.
3. Specify the PSFT\_CR node (remote node).
4. In the Node Definitions component, select the Connectors tab.

The screenshot shows the 'Node Definitions - Connectors' page. At the top, there are tabs: 'Node Definitions', 'Contacts', 'Properties', 'Connectors' (selected), 'Transactions', and 'Portal'. Below the tabs, the 'Node Name' is 'PSFT\_CR'. To the right of the node name is a 'Ping Node' button. Below this is a 'Details' section. In the 'Details' section, there are two input fields: 'Gateway ID' with the value '898B' and 'Connector ID' with the value 'PSFTTARGET'. To the right of these fields is a link: 'PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)'. Below the input fields is a message: 'This connector does not have properties. Use Gateways Page to setup.' At the bottom of the page, there are two buttons: 'Save' and 'Return to Search'.

Node Definitions - Connectors page

5. On the Connectors page, enter the PeopleSoft CRM gateway ID in the Gateway ID field .
6. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
7. Click Save.

To define a PSFTTARGET connector ID for the PeopleSoft HRMS nodes:

1. Verify that a gateway has been created for accessing the PeopleSoft HRMS database (local gateway).  
See “Setting Up the URL Gateway for PeopleSoft CRM and PeopleSoft HRMS.”
2. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in the PeopleSoft CRM system.
3. Specify the PSFT\_HR node (local node).
4. In the Node Definitions component, select the Connectors tab.



The screenshot displays the 'Node Definitions - Connectors' page. At the top, there are tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Connectors' tab is active. Below the tabs, the 'Node Name' is 'PSFT\_HR'. To the right of the node name is a 'Ping Node' button. Under the 'Details' section, there are two input fields: 'Gateway ID' with the value 'LOCAL' and 'Connector ID' with the value 'PSFTTARGET'. To the right of these fields is a message: 'PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)'. Below this message is a note: 'This connector does not have properties. Use Gateways Page to setup.' At the bottom of the form are buttons for 'Save' and 'Return to Search'. The breadcrumb trail at the very bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions - Connectors page

5. On the Connectors page, enter *LOCAL* in the Gateway ID field.
6. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
7. Click Save.

## Task 7-3: Setting Up PeopleSoft Single Signon

Integration machines should be set up to support single signon so that users do not need to sign on to PeopleSoft HRMS manually when transferring from PeopleSoft CRM to PeopleSoft HRMS. To do this, you must set a password authentication option for the PSFT\_CR node and define the same password for the node in both systems.

To set up the authentication option for the PSFT\_CR Node:

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in both PeopleSoft CRM and PeopleSoft HRMS.
2. Search for and open the PSFT\_CR node.
3. Select the Node Definitions tab.
4. Specify a password authentication option for PSFT\_CR node as follows:
  - a. On the Node Definitions page in the PeopleSoft CRM system, set the authentication option for the PSFT\_CR node to *Password* and enter an appropriate password.  
Press the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.
  - b. On the Node Definitions page in the PeopleSoft HRMS system, set the authentication option for the PSFT\_CR node to *Password* and enter the same password that you entered in the PeopleSoft CRM system. Click the Enter key or tab out of the Password field and enter the same password in the Confirm Password field.
5. Click Save.

The screenshot displays the 'Node Definitions' page for a node named 'PSFT\_HR'. The page is organized into several sections. On the left, there are labels for various fields: 'Node Name', '\*Description', '\*Node Type', '\*Routing Type', '\*Authentication Option', 'Password', '\*Default User ID', 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', and 'Code Set Group Name'. The corresponding values are entered in text boxes or dropdown menus. For example, 'Node Type' is set to 'PIA' and 'Routing Type' is set to 'Implicit'. On the right side, there are three checkboxes: 'Default Local Node', 'Local Node', and 'Active Node' (which is checked). Below these are 'Non-Repudiation' and 'Segment Aware' checkboxes. At the top right, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. At the bottom of the form, there are two links: 'Contact/Notes' and 'Properties'.

Node Definitions page

6. Identify the PSFT\_CR node as a trusted node for single signon in the PeopleSoft HRMS system as follows:
  - a. Select PeopleTools, Security, Security Objects, Single Signon to access the Single Signon page in PeopleSoft HRMS.
  - b. On the Single Sign On page, add the node PSFT\_CR to indicate that the node is trusted for single signon.
  - c. Click Save.
  - d. Do the same for the PSFT\_HR node on the PeopleSoft CRM system, to indicate that the node is trusted for single signon, by adding the node PSFT\_HR.
7. Verify that both the PeopleSoft CRM and PeopleSoft HRMS web servers are using the proper AuthTokenDomain.

When both PeopleSoft CRM and PeopleSoft HRMS are on PeopleSoft PeopleTools 8.48 or above, this step is not required.

To add an AuthTokenDomain to either the PeopleSoft CRM or PeopleSoft HRMS web server:

- a. Locate the configuration.properties file.

If the default paths were not selected during installation, the file will be located here:

\\<Webserver>\<PIA instance>\configuration.properties

This table provides the location of the Configuration.Properties files:

PeopleSoft Enterprise Application	Web Server	Directory
HRMS on PeopleTools releases prior to 8.47	BEA WebLogic release up to 6.1	C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\ps
HRMS on Peopletools releases prior to 8.47	BEA Weblogic releases post 6.1	<%PS_HOME%\webserver\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
HRMS on PeopleTools 8.47 and later	BEA WebLogic release post 6.1	<%PS_HOME%\webserver\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
CRM	BEA WebLogic releases post 6.1	<%PS_HOME%\webserver\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
HRMS	IBM WebSphere	C:\WebSphere\AppServer\installedApps\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
CRM	IBM WebSphere	<%PS_HOME%\webserver\<cellname_nodename_servername>\<domain ear>\PORTAL\WEB-INF\psftdocs\ps
CRM	Oracle Application Server	\$OAS_HOME/j2ee/<sitename>/applications/<sitename>/PORTAL/WEB-INF/pftdocs/ps/configuration.properties
HRMS	Oracle Application Server	\$OAS_HOME/j2ee/<sitename>/applications/<sitename>/PORTAL/WEB-INF/pftdocs/ps/configuration.properties

If you are using BEA WebLogic or IBM WebSphere, verify that the configuration.properties and cookierules.xml files contain a valid AuthTokenDomain for both the PeopleSoft CRM and PeopleSoft HRMS web servers. You can find cookierules.xml files in the following location:

```
<PS_Home>\webserver\<domain name>\applications\PeopleSoft\Portal\web-inf\psftdocs\<sitename>\webproof
```

- b. Add the following parameter:

```
AuthTokenDomain = .<domain>.com
```

For example:

```
AuthTokenDomain = .peoplesoft.com
```

---

**Note.** Ensure that you include a space in front of the first period (that is, after the = and before the domain). The space is required.

---

8. Reboot the PeopleSoft CRM and PeopleSoft HRMS web servers.

## Task 7-4: Pinging the PeopleSoft CRM and PeopleSoft HRMS Nodes

Ping the PSFT\_HR and PSFT\_CR nodes on both the PeopleSoft CRM and PeopleSoft HRMS systems to verify successful configuration.

To ping the PSFT\_HR and PSFT\_CR nodes:

1. Access the Node Status page in the Monitor Message component. If you are using PeopleSoft PeopleTools 8.48, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status. If you are using a PeopleSoft PeopleTools release prior to 8.48, select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
2. Select the Node Status tab.
3. On the Node Status page, search and select the node name PSFT\_HR or PSFT\_CR.
4. Click the Ping Node button.

You see *Success* in the message text. If not, you must refer to the *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Integration Broker* to debug.

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Node Status page

**Note.** You must follow all of the preceding steps to get a successful ping.

## Task 7-5: Activating the Message Channel or Queue

This section discusses:

- Confirming That Channel HD\_360\_SETUP Is Running in the PeopleSoft HRMS System
- Confirming that Queue HD\_360\_SETUP is Running in the PeopleSoft CRM System

**Note.** If both of your PeopleSoft CRM and PeopleSoft HRMS systems are running on PeopleSoft PeopleTools 8.48 or above, you can skip these tasks and proceed to the task “Activating the HR\_HELPDESK\_360 EIP Messages.”

## Task 7-5-1: Confirming That Channel HD\_360\_SETUP Is Running in the PeopleSoft HRMS System

To confirm that channel HD\_360\_SETUP is running:

1. If you are using PeopleSoft PeopleTools 8.48, select PeopleTools, Integration Broker, Service Operations Monitor, Administrator, Node Status.

If you are using a PeopleSoft PeopleTools release *prior* to 8.48, select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.

2. Confirm that channel HD\_360\_SETUP on the Channel Status tab is up and running.
3. The Run/Pause button is a toggle button.

If the status is Paused, click the Run button.

The status changes to Running, and the button changes to Pause.

## Task 7-5-2: Confirming that Queue HD\_360\_SETUP is Running in the PeopleSoft CRM System

To confirm that queue HD\_360\_SETUP is running:

1. In the PeopleSoft CRM system, select People Tools, Integration Broker, Integration Setup, Queues and search on Queue Name begins with HD\_360\_SETUP to access the Queue Definitions page.
2. Confirm that Queue Status for HD\_360\_SETUP is set to *Run*. If the Queue Status is set to *Pause*, select *Run* from the Queue Status drop-down field.
3. Click Save.

---

## Task 7-6: Activating the HR\_HELPDESK\_360 EIP Messages

### Understanding Message Activation for the HR\_HELPDESK\_360 EIP Messages

The 360-Degree View EIP includes two application messages, Name HD\_360\_REQUEST\_SYNC and HD\_360\_RESPONSE\_SYNC. These messages are inactive when shipped. You must activate these messages in both the PeopleSoft CRM and PeopleSoft HRMS systems.

### Task 7-6-1: Activating the 360-Degree View EIP Application Messages in PeopleSoft HRMS

To activate the 360-Degree View EIP application messages in the PeopleSoft HRMS system:

1. Sign on to Application Designer.
2. Select File, Open, and then select *Message* from the Definition drop-down list box.

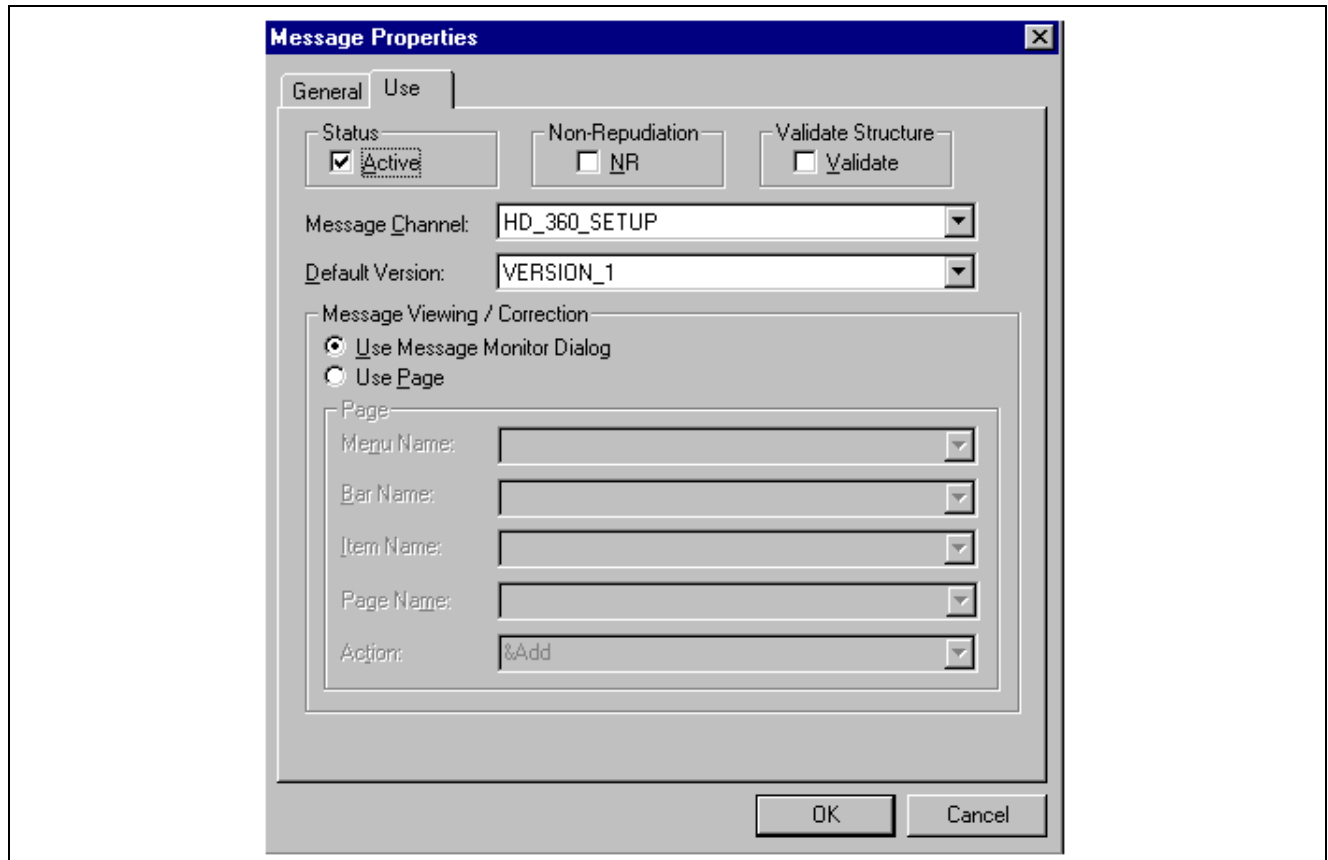
This enables you to find application message definitions.

To find the 360-Degree View EIP application message definitions, search for each of the following message names:

HD\_360\_REQUEST\_SYNC and HD\_360\_RESPONSE\_SYNC

For each message, open the message definition and perform the next two steps.

3. Right-click the message and select Message Properties.
4. On the Use tab of the Message Properties dialog box, select the Active Status check box and click OK.



Message Properties dialog box

5. Save the message definition.

## Task 7-6-2: Activating the 360-Degree View EIP Application Messages in PeopleSoft CRM for PeopleSoft CRM 9 and PeopleSoft HRMS 8.9

To activate the 360-Degree View EIP application messages in the PeopleSoft CRM system:

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.

**Services**

**Service:** HD\_360\_REQUEST\_SYNC

**\*Description:** HR Helpdesk Request

**Comments:** HR Helpdesk Request message. This request message is sent to HRMS application to get worker information.

**Service Alias:**

**Object Owner ID:** 360 Degree View

**\*Namespace:** http://www.oracle.com/enterprise/crm

[View WSDL](#)

**Service Operations**

**Service Operation:**

**Operation Type:** Add

**Existing Operations** [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Operation	Message Links	Active	Operation Type
HD_360_REQUEST_SYNC.VERSION_2	HR Helpdesk	<input type="checkbox"/>	Synch

Save

Services page

2. Select HD\_360\_REQUEST\_SYNC.VERSION\_2 from the Existing Operations section to open the Operations page.
3. To activate HD\_360\_REQUEST\_SYNC.VERSION\_2, select the Active check box under Default Service Operation Version for VERSION\_2 on the General tab and click Save.

**General** | Handlers | Routings

**Service Operation:** HD\_360\_REQUEST\_SYNC  
**Service:** HD\_360\_REQUEST\_SYNC  
**Operation Type:** Synchronous  
**\*Operation Description:** HR Helpdesk Message ☐ User/Password Required  
**Operation Comments:**   
**Object Owner ID:** 360 Degree View   
**Operation Alias:**   
[Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_2 ☒ **Default** ☐ **Active**  
**Version Description:** HR Helpdesk  
**Version Comments:**   
☐ Non-Repudiation  
☐ Runtime Schema Validation

[Intropection](#)  
[Add Fault Type](#)

**Message Information**

**Type:** Request  
**Message.Version:** HD\_360\_REQUEST\_SYNC.VERSION\_2 [View Message](#)

**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_2 [View Message](#)

**Routing Status**

**Any-to-Local:** Does not exist  
**Local-to-Local:** Does not exist

**Routing Actions Upon Save**

☐ Generate Any-to-Local  
☐ Generate Local-to-Local

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) 1 of 1 [Last](#)

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

[Save](#) [Return to Service](#) [Add Version](#)

[General](#) | [Handlers](#) | [Routings](#)

General page

4. To activate the routing for HD360\_VERSION\_2:
  - a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
  - b. Select HD\_360\_REQUEST\_SYNC.VERSION\_2 from the Existing Operations section to open the Operations page.
  - c. Select the Routings tab and click HD360\_VERSION\_2.



General Handlers **Routings**

Service Operation: HD\_360\_REQUEST\_SYNC  
 Default Version: VERSION\_2  
 Routing Name:

Routing Definitions

Selected	Name	Version	Routing Type	Sender Node	Receiver Node	Direction	Status
<input type="checkbox"/>	-GEN-UPG-11870	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_1	VERSION_1	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_2	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive

[Return to Service](#)

Routings page

d. On the Routing Definitions page, select the Active check box and click Save.

**Routing Definitions** Parameters Connector Properties

Routing Name: HD360\_VERSION\_2 ☒ Active  
 \*Service Operation: HD\_360\_REQUEST\_SYNC ☐ System Generated  
 Version: VERSION\_2  
 \*Description: HD360\_VERSION\_2  
 Comments:   
 \*Sender Node: PSFT\_CR  
 \*Receiver Node: PSFT\_HR  
 Routing Type: Synchronous ☐ User Exception  
 Object Owner ID: 360 Degree View  
 \*Log Detail: No Logging

Routing Definitions page

### Task 7-6-3: Activating the 360-Degree View EIP Application Messages in PeopleSoft CRM for PeopleSoft CRM 9 and PeopleSoft HRMS 8.8 SP1

To activate the 360-Degree View EIP application messages in the PeopleSoft CRM system:

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
2. For integrations between PeopleSoft CRM 9 and PeopleSoft HCM 8.8, activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_2 and service operation HD\_360\_REQUEST\_SYNC.VERSION\_1.

3. To activate HD\_360\_REQUEST\_SYNC.VERSION\_2 , select the Active check box under Default Service Operation Version for VERSION\_2 on the General page and click Save.

**General** | Handlers | Routings

Service Operation: HD\_360\_REQUEST\_SYNC  
 Service: HD\_360\_REQUEST\_SYNC  
 Operation Type: Synchronous

\*Operation Description: HR Helpdesk Message ☐ User/Password Required

Operation Comments:

Object Owner ID: 360 Degree View

Operation Alias:  [Service Operation Security](#)

**Default Service Operation Version**

\*Version: VERSION\_2 ☒ Default ☐ Active

Version Description: HR Helpdesk

Version Comments:

☐ Non-Repudiation ☐ Runtime Schema Validation

[Introspection](#)

[Add Fault Type](#)

**Message Information**

Type: Request  
 Message.Version: HD\_360\_REQUEST\_SYNC.VERSION\_2 [View Message](#)

Type: Response  
 Message.Version: HD\_360\_RESPONSE\_SYNC.VERSION\_2 [View Message](#)

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

[Save](#) [Return to Service](#) [Add Version](#)

[General](#) | [Handlers](#) | [Routings](#)

General page

4. To activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_1, select VERSION\_1 under Non-Default Versions on the General page.
5. On the Service Operation Version page, select the Active check box and Save.

**Service Operation Version**

Service Operation: HD\_360\_REQUEST\_SYNC ☐ Default ☐ Active

Service: HD\_360\_REQUEST\_SYNC

Service Operation Version: VERSION\_1

Operation Type: Synchronous

Description: HR Helpdesk Message

Comments:

☐ Non-Repudiation

☐ Runtime Schema Validation

Add Fault Type

**Message Information**

Type: Request

Message.Version: HD\_360\_REQUEST\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Request Message

HD\_360\_REQUEST\_SYNC.VERSION\_1

Transform From Default: HD360\_REQ\_V2

Transform To Default:

Type: Response

Message.Version: HD\_360\_RESPONSE\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Response Message

HD\_360\_RESPONSE\_SYNC.VERSION\_2

Transform From Default: HD360\_RES\_V1

Transform To Default:

Save Return

Service Operation Version page

6. To activate the routing for HD360\_VERSION\_1:
  - a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
  - b. Select the Routings tab and click HD360\_VERSION\_1.

Selected	Name	Version	Routing Type	Sender Node	Receiver Node	Direction	Status
<input type="checkbox"/>	-GEN-UPG-11870	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_1	VERSION_1	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_2	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive

Routings page

c. On the Routings Definitions page, select the Active check box.

Routing Name: HD360\_VERSION\_1 ☐ Active

\*Service Operation: HD\_360\_REQUEST\_SYNC ☐ System Generated

Version: VERSION\_1

\*Description: HD360\_VERSION\_1

Comments:

\*Sender Node: PSFT\_CR

\*Receiver Node: PSFT\_HR

Routing Type: Synchronous ☐ User Exception

Object Owner ID: 360 Degree View

\*Log Detail: No Logging

Save Return

Routing Definitions page

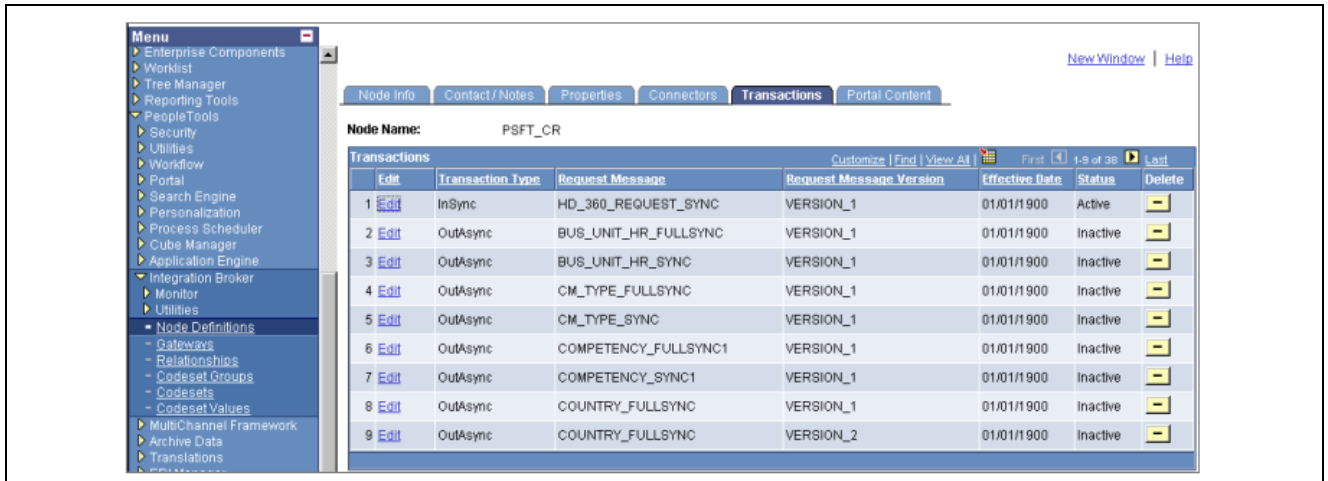
## Task 7-7: Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.8

Transactions are defined in the remote node of each system. Follow the steps in this task to activate transactions for the PSFT\_CR node in the PeopleSoft HRMS 8.8 system.

To activate transactions for the PSFT\_CR node in PeopleSoft HRMS:

1. Open the PSFT\_CR node definition in the Node Definitions component.

Select PeopleTools, Integration Broker, Node Definitions and select the PSFT\_CR node in PeopleSoft HRMS.



Node Definitions: Transactions page

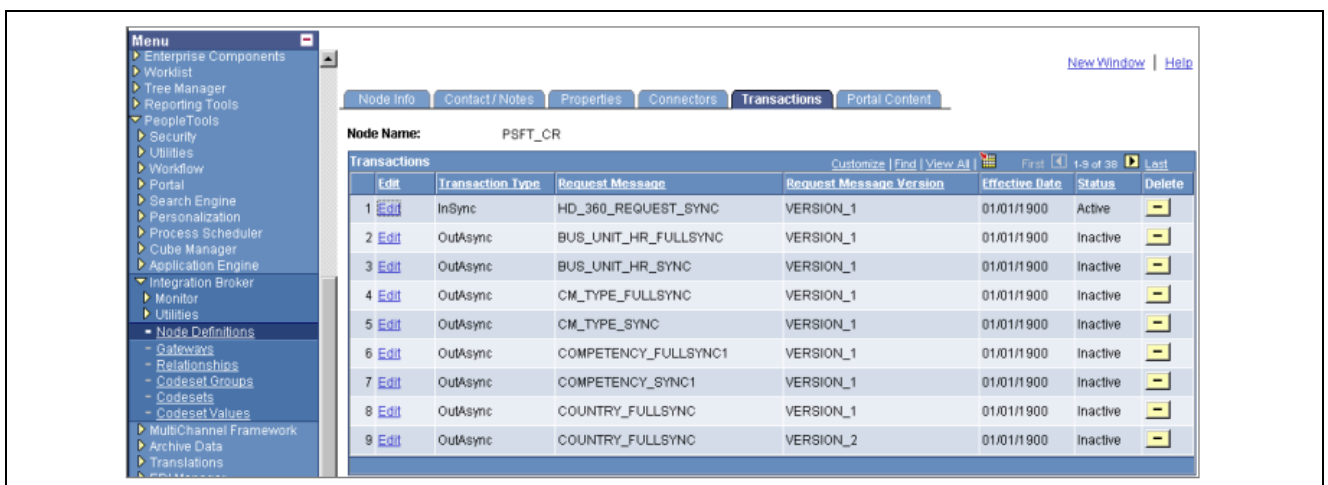
2. Change the status of the HD\_360\_REQUEST\_SYNC message to *Active*.
3. Click Save and OK to accept the related warning message that you may receive.

## Task 7-8: Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.9

Transactions are defined in the remote node of each system. Follow the steps in this task to activate transactions for the PSFT\_CR node in the PeopleSoft HRMS 8.9 system.

To activate transactions for the PSFT\_CR node in PeopleSoft HRMS:

1. Select PeopleTools, Integration Broker, Node Definitions and select the PSFT\_CR node in PeopleSoft HRMS.



Node Definitions: Transactions page

2. Select the Transactions tab of the Node Definitions component and click the Add Transaction button.



Node Name PSFT\_CR

Transactions						
	Transaction Type	Request Message	Request Message Version	Effective Date	Status	
1	InSync	HD_360_REQUEST_SYNC	VERSION_1	01/01/1900	Inactive	

Add Transaction Copy All Transactions

Transactions page

On the Add a New Value tab of the Node Transactions page, enter the information shown in the following example and click the Add button to add VERSION\_2 of the HD\_360\_REQUEST\_SYNC message.

Node Transactions

Find an Existing Value Add a New Value

Node Name: PSFT\_CR

Effective Date: 04/24/2006

Transaction Type: Inbound Synchronous

Request Message: HD\_360\_REQUEST\_SYNC

Request Message Version: VERSION\_2

Add

Node Transactions page

**Note.** The date in the Effective Date field represents the date from which the message is active; enter any date that meets your business needs.

3. On the Transaction Detail page, set the status of the request message to *Active*.

Transactions Messages

Node Name PSFT\_CR

**Transaction Detail**

Effective Date 04/24/2006

Transaction Type InSync

Request Message HD\_360\_REQUEST\_SYNC

Request Message Version VERSION\_2

\*Status Inactive

☐ Override Connector

Comment

[Return to Transaction List](#)

Transactions - Transaction Detail page

4. On the Messages tab, under Response Message, set the Message Name to HD\_360\_RESPONSE\_SYNC and the Message Version to VERSION\_2.

The screenshot displays the 'Messages' tab in a PeopleSoft interface. At the top, there are tabs for 'Transactions' and 'Messages'. Below them, the 'Node Name' is set to 'PSFT\_CR'. The main section is titled 'Transaction Messages' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The transaction details show: Effective Date 04/24/2006, Status Inactive, Transaction Type InSync, and \*Synchronous Logging set to 'No Logging'. Below this, the 'Request Message' section shows Message Name HD\_360\_REQUEST\_SYNC and Message Version VERSION\_2, with an empty External Name field. The 'Response Message' section shows Message Name HD\_360\_RESPONSE\_SYNC, Message Version VERSION\_2, and an empty External Name field. A 'Save' button is located at the bottom left, and a 'Return to Transaction List' link is at the bottom right.

Messages page

5. Click Save and OK to accept a related warning message you might get.

## Task 7-9: Setting Up Portal Content Links

You must define the portal content to enable the link from the case in PeopleSoft Enterprise HelpDesk for Human Resources to the 360-Degree View.

To define portal content:

1. In PeopleSoft CRM, access the PeopleSoft HRMS node in the Node Definitions component. Select PeopleTools, Portal, Node Definitions and specify the PeopleSoft HRMS node.
2. In the Node definition component, select the Portal tab.

**Note.** This enables the links on the Case page to directly transfer from PeopleSoft CRM to PeopleSoft HRMS. This must be set up in the Node Definitions under the Portal menu folder, *not* in the Integration Broker folder.



The screenshot shows the 'Node Definitions' page with the 'Portal' tab selected. The 'Node Name' is 'HRMS'. Under the 'Details' section, the 'Description' is 'Portal Node - HRMS' and the 'Local Node' checkbox is checked. The 'Tools Release' is set to 8.42 and the 'Application Release' is set to 8.8. The 'Content URI Text' field contains 'http://eiw009/psc/ps/' with an example 'http://someserver/psc/pshome/' above it. The 'Portal URI Text' field contains 'http://eiw009/psp/ps/' with an example 'http://someserver/psp/pshome/' above it. At the bottom, there are 'Save' and 'Return to Search' buttons.

Node Definitions - Portal page

3. On the Portal page, enter the content URI text and portal URI text to define how PeopleSoft HRMS system users transfer to and from the PeopleSoft CRM system.
  - Content URI:
   
http://<webserver\_machine\_name>:<Port>/psc/<PIA website name>/
  - Portal URI:
   
http://<webserver\_machine\_name>:<Port>/psp/<PIA website name>/
   
The <webserver\_machine\_name> refers to the PeopleSoft HRMS system and the <Port> value should be an HTTP port.
4. Click Save.

## Task 7-10: Activating the Link Category Definition in PeopleSoft CRM for Integration with PeopleSoft HCM 8.8

In PeopleSoft CRM 9, the delivered active links are for PeopleSoft HCM 8.9. If you are integrating to PeopleSoft HCM 8.8, you must de-activate the 8.9 links and activate the 8.8 links in the PeopleSoft CRM database.

To activate the link category definition for PeopleSoft HRMS 8.8:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Category.
2. Search for version 8.8.

**Link Category**  
Enter any information you have and click Search. Leave fields blank for a list of all values.


**Find an Existing Value** **Add a New Value**

**Link Category:** begins with

**Version:** =  8.8

**Active Flag:** =

**Long Description:** begins with

[Basic Search](#)  [Save Search Criteria](#)

**Search Results**

View All First  Last

Link Category	Version	Active Flag	Long Description	Short Name
<a href="#">BENEF</a>	<a href="#">8.8</a>	<a href="#">Active</a>	<a href="#">Benefits</a>	<a href="#">Benefits</a>
<a href="#">HRMS</a>	<a href="#">8.8</a>	<a href="#">Active</a>	<a href="#">HRMS</a>	<a href="#">Human Resources</a>
<a href="#">PAYR</a>	<a href="#">8.8</a>	<a href="#">Active</a>	<a href="#">Payroll</a>	<a href="#">Payroll</a>
<a href="#">STOCK</a>	<a href="#">8.8</a>	<a href="#">Active</a>	<a href="#">Stock</a>	<a href="#">Stock</a>
<a href="#">TRNG</a>	<a href="#">8.8</a>	<a href="#">Active</a>	<a href="#">Training</a>	<a href="#">Training</a>


Link Category search page

Perform the following steps to de-activate each link category.

- Click the Modify System Data button.

**Link Category Definition**

**Description** Appliances

**Link Category Definitions** [Customize](#) [Find](#)  First  Last

Link Category	Version	Active Flag	Order	Short Name	Long Description
HRMS	8.8	Active	10	Human Resources	HRMS

**This object is maintained by PeopleSoft.**

Link Category Definition page

- Select *Inactive* from the Active Flag drop-down list box.

**Link Category Definition**

**Description** Appliances

Link Category Definitions Customize Find First 1 of 1 Last

*Link Category	*Version	*Active Flag	Order	*Short Name	*Long Description
HRMS	8.8	Inactive	10	Human Resources	HRMS

This object was delivered by PeopleSoft but updated by the customer.

Save Return to Search Next in List Previous in List Add Update/Display

Updated Link Category Definition page

5. Click Save.
6. Repeat steps 3 through 5 for each link category.



## CHAPTER 8

# Integrating PeopleSoft CRM 9 with PeopleSoft HRMS 8.3 SP1 to Access the HRHD Worker 360-Degree View

This chapter discusses:

- Understanding the Integration of PeopleSoft CRM 9 with PeopleSoft HRMS 8.3 SP1 to Access the HRHD Worker 360-Degree View
- Prerequisites
- Creating the Local PeopleSoft CRM Node in PeopleSoft HRMS
- Adding the PeopleSoft CRM Node for Single Signon in PeopleSoft HRMS
- Adding AuthTokenDomain to Configuration.Properties in PeopleSoft CRM and PeopleSoft HRMS
- Adding the CPHD1000 Permission List to Standard Non-Page Permissions Role in PeopleSoft HRMS
- Testing XML Link Services in PeopleSoft HRMS
- Rebooting the PeopleSoft HRMS Web Server and Application Server
- Activating the 360-Degree View EIP Application Messages in PeopleSoft CRM
- Loading Connectors into Gateway in PeopleSoft CRM
- Creating the XML Link for 360-Degree View Node in PeopleSoft CRM
- Creating an Action Link Node in PeopleSoft CRM
- Setting the Password for the PeopleSoft CRM Default Local Node in PeopleSoft CRM
- Adding an Authentication Domain in PeopleSoft CRM
- Activating the Link Category Definition in PeopleSoft CRM
- Setting Up the Link Group in PeopleSoft CRM
- Copying the PeopleSoft HRMS CREF Project in PeopleSoft CRM
- Rebooting the PeopleSoft CRM Application and Web Servers
- Testing Action Links and the HRHD 360-Degree View in PeopleSoft CRM

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## Understanding the Integration of PeopleSoft CRM 9 with PeopleSoft HRMS 8.3 SP1 to Access the HRHD Worker 360-Degree View

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). The EIP enables access to the PeopleSoft Enterprise HelpDesk for Human Resources (HRHD) Worker 360-Degree View from PeopleSoft CRM.

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**Note.** Before proceeding with your installation, consult Oracle's PeopleSoft Customer Connection website to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools Installation guide for your database platform for both the PeopleSoft CRM and Peoplesoft HRMS applications.

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**Note.** In addition, consult Oracle's PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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### See Also

"Integrating PeopleSoft CRM 9 with PeopleSoft HRMS 8.8 SP1 or HRMS 8.9 to Access the HRHD Worker 360-Degree View."

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## Prerequisites

Before you can begin the PeopleSoft CRM and PeopleSoft HRMS integration tasks in this chapter, you must complete these requirements:

1. Install and configure a PeopleSoft CRM 9 database.
2. Install and configure a PeopleSoft HRMS 8.3 SP1 database.
3. Verify that XML Link is set up on the PeopleSoft HRMS database.

See *PeopleSoft Business Interlinks PeopleBook*, "Creating an Inbound Business Interlink."

The examples shown in this chapter are from PeopleSoft CRM 9 and PeopleSoft HRMS 8.3 SP1. The node names may vary depending on your environment setup. The PeopleSoft CRM local node is PSFT\_CR and the PeopleSoft HRMS 8.3 SP1 local node is PSFT\_HR.

Apply the following updates that are available on PeopleSoft Customer Connection for the PeopleSoft HRMS 8.3 SP1 database. You must apply the following update *before* you proceed with the tasks in this installation document:

PeopleSoft HRMS 8.3 SP1 - Update ID: 125492

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## Task 8-1: Creating the Local PeopleSoft CRM Node in PeopleSoft HRMS

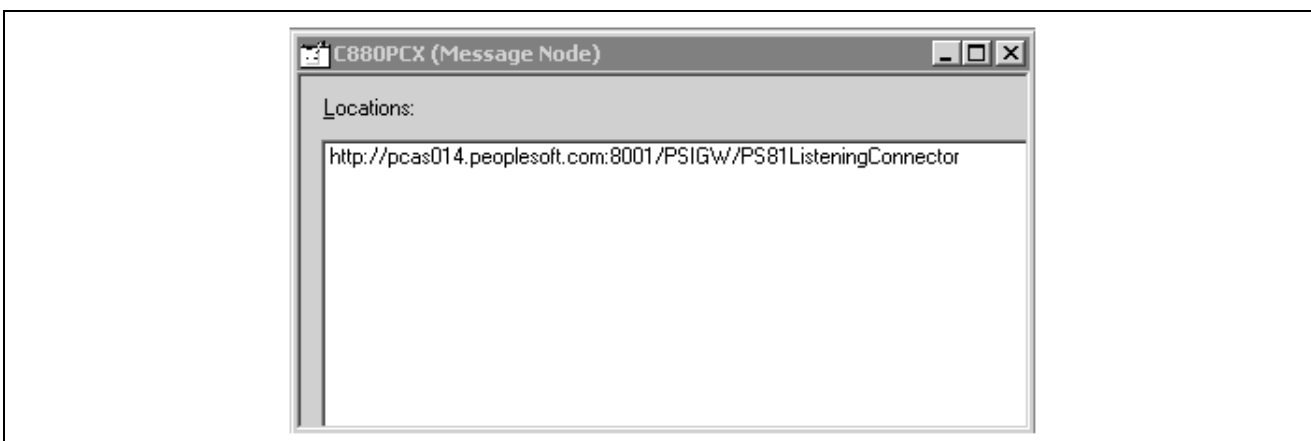
Perform this task on the PeopleSoft HRMS database.

Create a new Message Node in the PeopleSoft HRMS database that matches the name of the CRM DEFAULT local node on the PeopleSoft CRM database. The following example assumes that the local node on the PeopleSoft CRM side is named PSFT\_CR:

1. Launch PeopleSoft Application Designer.
2. Select File, New, Message Node.

The Message Node dialog box appears.

3. Right-click the location area to insert a location.



Message Node dialog box

4. For the location of this node, insert the URL path to the PeopleSoft CRM integration gateway.

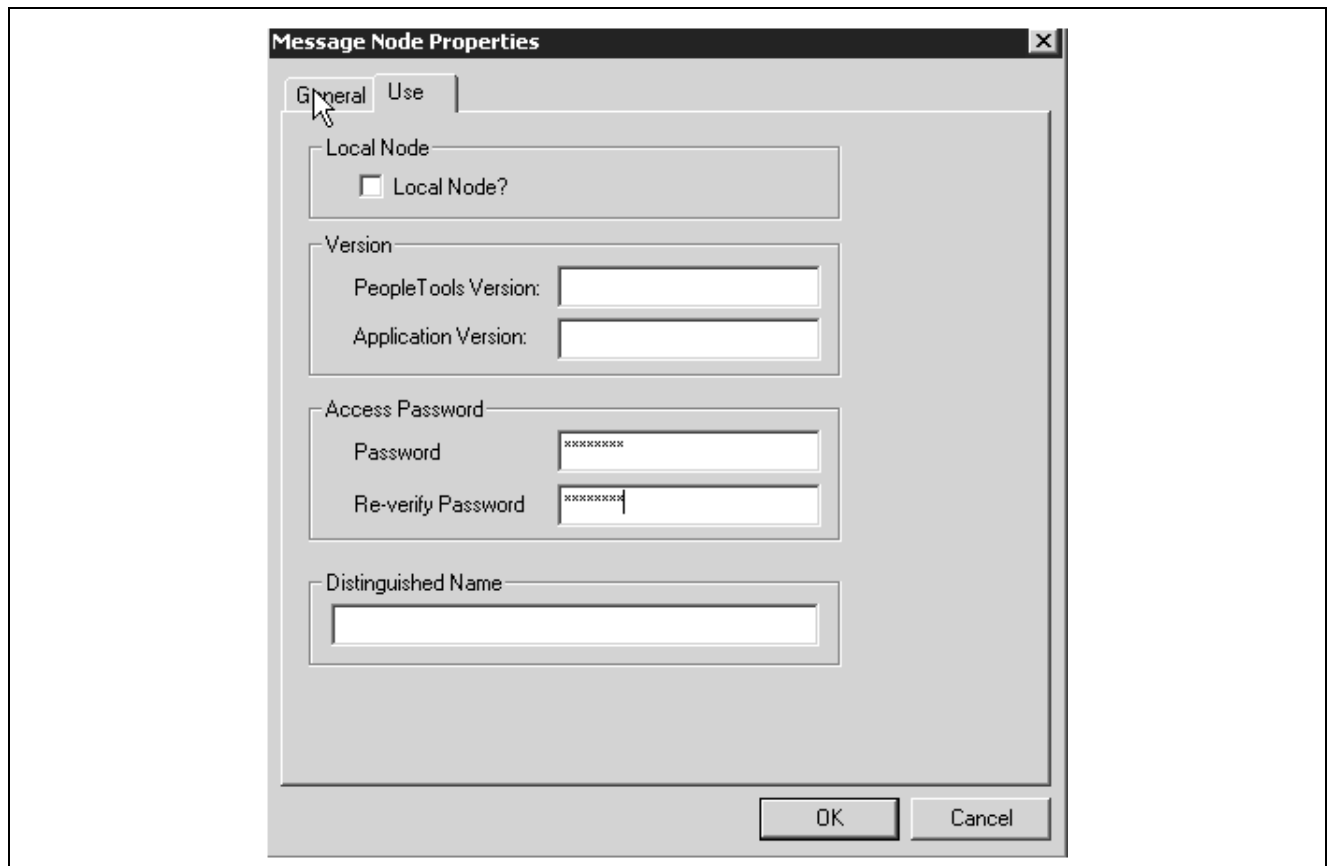
Use this location format:

`http://<servername.peoplesoft.com>/ PSIGW/PS81ListeningConnector`

For example: `http://pcas014.peoplesoft.com:8001/ PSIGW/PS81ListeningConnector`

5. Select the properties of the Message Node.

The Message Node properties dialog box appears.




Message Node Properties dialog box

6. On the Use tab, enter a password that matches the password on the PeopleSoft CRM side for PeopleSoft CRM DEFAULT local node of PSFT\_CR and save.

Shown here is the Node Definition page for PSFT\_CR in PeopleSoft CRM. The password that you enter here must match the password that you set up in the HR environment:





The image shows the 'Node Definitions' tab in a PeopleSoft interface. The 'Node Name' is 'PSFT\_CR' and the 'Description' is 'PSFT CRM - Local Node'. The 'Node Type' is 'PIA'. The 'Authentication Option' is set to 'Password'. The 'Password' field is masked with dots. The 'Default User ID' is 'VP1'. The 'Hub Node', 'Master Node', and 'Company ID' fields are empty. The 'IB Throttle Threshold' is empty. The 'Image Name' and 'Code Set Group Name' fields are empty. On the right, there are checkboxes for 'Default Local Node' (checked), 'Local Node' (checked), 'Active Node' (checked), 'Non-Repudiation' (unchecked), and 'Segment Aware' (unchecked). There are 'Copy Node' and 'Rename Node' buttons. At the bottom, there are links for 'Contact/Notes' and 'Properties'.

Node Definition page for PSFT\_CR

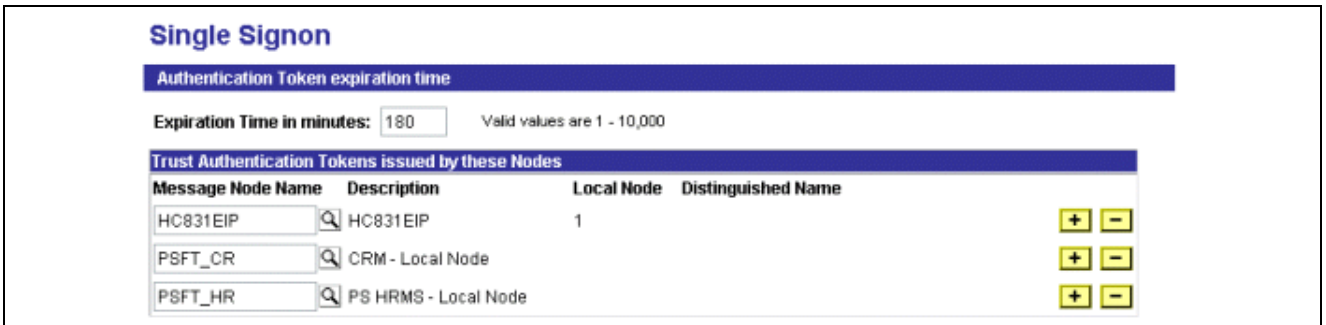
## Task 8-2: Adding the PeopleSoft CRM Node for Single Signon in PeopleSoft HRMS

Perform this task on the PeopleSoft HRMS database.

Add the PeopleSoft CRM node that was created on the HR database as a trusted domain. This is needed because the HR environment must trust the source of the XML request, which is coming from PeopleSoft CRM.

1. Log into the PeopleSoft HRMS database.
2. Select PeopleTools, Maintain Security, Setup, Single Signon.

The Single Signon page appears.



The image shows the 'Single Signon' page. At the top, there is a section for 'Authentication Token expiration time' with a text box for 'Expiration Time in minutes' set to '180' and a note 'Valid values are 1 - 10,000'. Below this is a table titled 'Trust Authentication Tokens issued by these Nodes'. The table has four columns: 'Message Node Name', 'Description', 'Local Node', and 'Distinguished Name'. There are three rows of data: 'HC831EIP' (Description: HC831EIP, Local Node: 1), 'PSFT\_CR' (Description: CRM - Local Node), and 'PSFT\_HR' (Description: PS HRMS - Local Node). Each row has a search icon and a '+' button. There are also '-' buttons for each row.

Single Signon page

3. Click the + button in the Trust Authentication Tokens issued by these Nodes group box, and enter the name of the PeopleSoft CRM node.

This example uses *PSFT\_CR*.

---

## Task 8-3: Adding AuthTokenDomain to Configuration.Properties in PeopleSoft CRM and PeopleSoft HRMS

To add AuthTokenDomain to the configuration.properties file to either the PeopleSoft CRM or PeopleSoft HRMS system:

1. Locate the configuration.properties file:
  - If you used the default paths during installation, use this default location for the file:  
C:\Apps\weblogic\myserver\psftdocs\peoplesoft8\configuration.properties
  - If the default paths were not selected during installation, the configuration.properties file will be located as shown in the following table:

Web Server	Directory
BEA WebLogic release up to 6.1	C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\ps
BEA WebLogic release post 6.1	<%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

2. Add the following parameter:

```
AuthTokenDomain = .<domain>.com
```

For example:

```
AuthTokenDomain = .peoplesoft.com
```

---

**Note.** Ensure that you include a space in front of the first period (after the = and before the domain). The space is required.

---

---

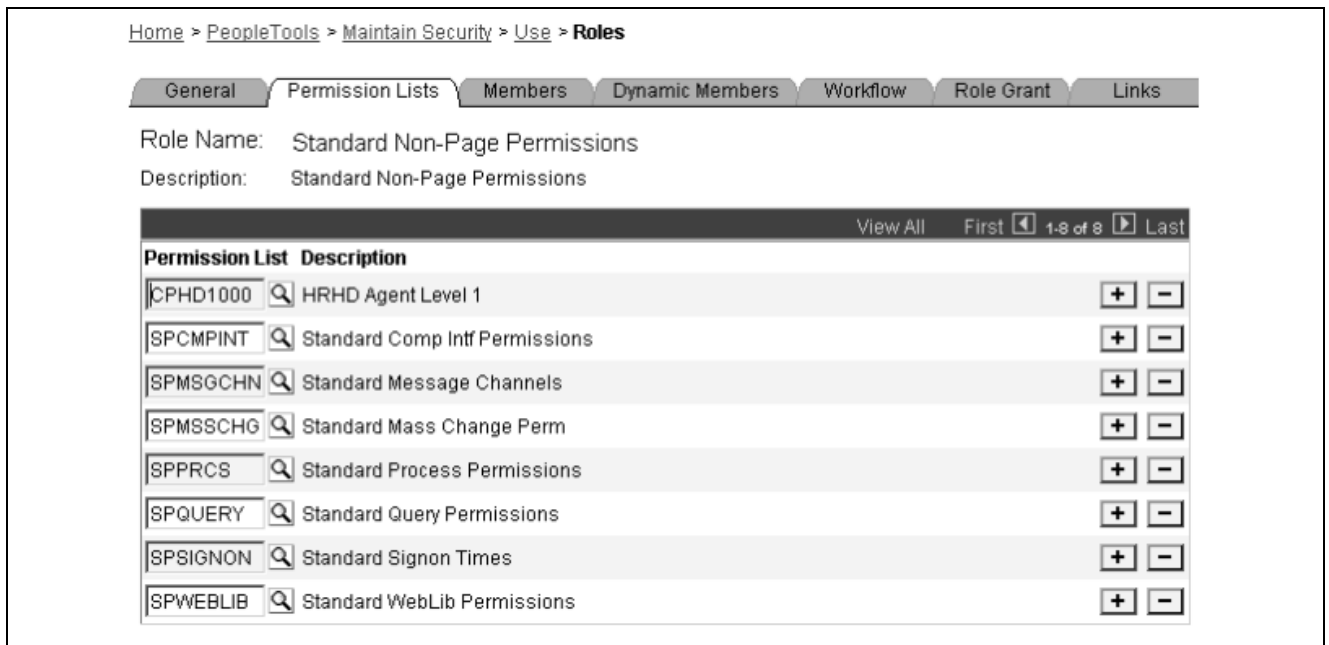
## Task 8-4: Adding the CPHD1000 Permission List to Standard Non-Page Permissions Role in PeopleSoft HRMS

Perform this task on the PeopleSoft HRMS database.

Add the CPHD1000 permission list to the Standard Non-Page Permissions Role. This permission list enables users to access the WEBLIB\_HRMS360 web library when any user attempts to retrieve PeopleSoft HRMS data from the PeopleSoft CRM HelpDesk 360-Degree View.

To add the permission list:

1. Select PeopleTools, Maintain Security, Use, Roles, Update/Display (*Standard Non-Page Permissions*), Permissions List tab.  
The Permission Lists page appears.
2. Add the CPHD1000 permission list to the existing permission lists for the role, and then click Save.



Permission Lists page

## Task 8-5: Testing XML Link Services in PeopleSoft HRMS

Perform this task on the PeopleSoft HRMS database.

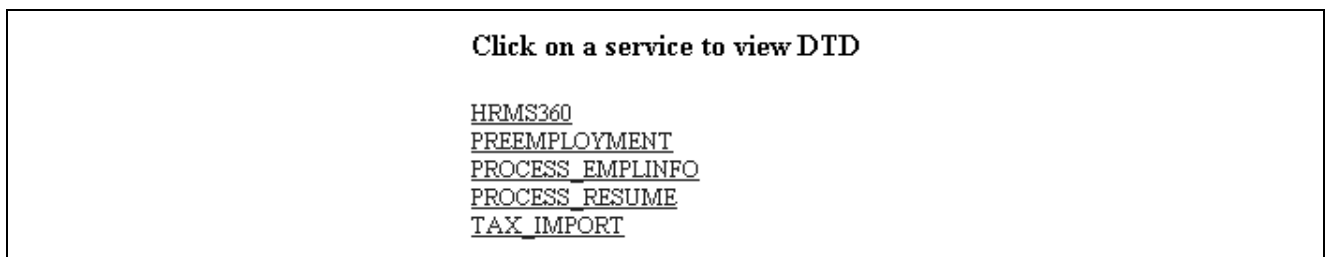
Access the XML Link servlet and verify that your service appears in the list.

1. Enter the URL `http://<machine_name>:<port>/servlets/xmllink/<PIApath>` in a browser, where `<machine_name>` is the server name and `<PIApath>` is the default path for the PeopleSoft Pure Internet Architecture, normally `<peoplesoft8>`.

For example:

`http://phas006.peoplesoft.com:7201/servlets/xmllink/h831pbxnt/`

A list of registered XML services appears.



Example of a list of registered XML services

2. Verify that your service appears in the list.

The previous example shows that this HRMS360 service is registered as an XML service.

---

## Task 8-6: Rebooting the PeopleSoft HRMS Web Server and Application Server

Perform this task on the PeopleSoft HRMS database. Perform the remaining tasks in this chapter on the PeopleSoft CRM database.

1. Clear the cache and reboot the application server.
2. Reboot the web server.

---

## Task 8-7: Activating the 360-Degree View EIP Application Messages in PeopleSoft CRM

To activate the 360-Degree View EIP application messages in the PeopleSoft CRM system:

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.

The General page appears.

2. For integrations between PeopleSoft CRM 9 and PeopleSoft HCM 8.3, activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_2 and service operation HD\_360\_REQUEST\_SYNC.VERSION\_1.
  - a. To activate HD\_360\_REQUEST\_SYNC.VERSION\_2 , select the Active check box under Default Service Operation Version for VERSION\_2 on the General page.

**General** | Handlers | Routings

**Service Operation:** HD\_360\_REQUEST\_SYNC  
**Service:** HD\_360\_REQUEST\_SYNC  
**Operation Type:** Synchronous

**\*Operation Description:** HR Helpdesk Message ☐ User/Password Required

**Operation Comments:**

**Object Owner ID:** 360 Degree View

**Operation Alias:**  [Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_2 ☒ **Default** ☐ **Active**

**Version Description:** HR Helpdesk [Routing Status](#)

**Version Comments:**

☐ Non-Repudiation ☐ Generate Any-to-Local

☐ Runtime Schema Validation ☐ Generate Local-to-Local

[Introspection](#)

**Message Information**

**Type:** Request  
**Message.Version:** HD\_360\_REQUEST\_SYNC.VERSION\_1  [View Message](#)

**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_1  [View Message](#)

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

[Return to Service](#) [Add Version](#)

General | [Handlers](#) | [Routings](#)

General page

- To activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_1, select *VERSION\_1* in the Non-Default Versions region of the General page.
- On the Service Operation Version page, select the Active check box and click Save.

**Service Operation Version**

Service Operation: HD\_360\_REQUEST\_SYNC ☐ Default ☐ Active

Service: HD\_360\_REQUEST\_SYNC

Service Operation Version: VERSION\_1

Operation Type: Synchronous

Description: HR Helpdesk Message

Comments:

☐ Non-Repudiation

☐ Runtime Schema Validation

Add Fault Type

**Message Information**

Type: Request

Message.Version: HD\_360\_REQUEST\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Request Message  
HD\_360\_REQUEST\_SYNC.VERSION\_1

Transform From Default: HD360\_REQ\_V2

Transform To Default:

**Type: Response**

Message.Version: HD\_360\_RESPONSE\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Response Message  
HD\_360\_RESPONSE\_SYNC.VERSION\_2

Transform From Default: HD360\_RES\_V1

Transform To Default:

Save Return

Service Operation Version page

- d. To activate the routing for HD360\_VERSION\_1, select PeopleTools, Integration Broker, Integration Setup, Routings and search for the service *HD\_360\_REQUEST\_SYNC*.
- e. On the Routings Definitions page, select the Active check box.

Routing Definitions page

## Task 8-8: Loading Connectors into Gateway in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To load Gateway connectors in PeopleSoft CRM:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Select *Gateway ID = LOCAL*.
3. Specify Gateway URL.

Use this URL format:

`http://<webserver>/PSIGW/PeopleSoftListeningConnector`

For example: `http://pcas014.peoplesoft.com:8001/PSIGW/PeopleSoftListeningConnector`

4. Click Save.

**Gateways**

Gateway ID: LOCAL

☒ Local Gateway ☐ Load Balancer

URL: <http://pcas014.peoplesoft.com:8001/PSIGW/PeopleSoftLister> [Properties](#)

[Load Gateway Connectors](#)

**Connectors**

*Connector ID	Description	*Connector Class Name	Properties
1 FILEOUTPUT		SimpleFileTargetConnector	<a href="#">Properties</a>
2 FTPTARGET		FTPTargetConnector	<a href="#">Properties</a>
3 GETMAILTARGET		GetMailTargetConnector	<a href="#">Properties</a>
4 HTTPTARGET		HttpTargetConnector	<a href="#">Properties</a>
5 JMSTARGET		JMSTargetConnector	<a href="#">Properties</a>
6 LDAPTARGET		LDAPTargetConnector	<a href="#">Properties</a>
7 POP3TARGET		POP3TargetConnector	<a href="#">Properties</a>
8 PSFT81TARGET		ApplicationMessagingTargetConnector	<a href="#">Properties</a>
9 PSFTTARGET		PeopleSoftTargetConnector	<a href="#">Properties</a>
10 SMTPTARGET		SMTPTargetConnector	<a href="#">Properties</a>

[Save](#) [Return to Search](#)

Gateways page

- Click Load Gateway Connectors.
- Click Save.

## Task 8-9: Creating the XML Link for 360-Degree View Node in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To create the XML Link for the 360-Degree View node:

- Select PeopleTools, Integration Broker, Integration Setup, Nodes.
- Search for the PSFT\_HR node.

If the PSFT\_HR node is not available, add a new node value called PSFT\_HR.

Application	Node Name
PeopleSoft HRMS 8.3 SP1	PSFT_HR





The screenshot shows the 'Node Definitions' page for 'HD360\_83'. The 'Node Name' is 'PSFT\_HR' and the 'Description' is 'PS HRMS - Local Node'. The 'Node Type' is set to 'ICType'. The 'Authentication Option' is 'Password'. The 'Password' field is masked with dots. The 'Default User ID' is 'VP1'. The 'Hub Node', 'Master Node', 'Company ID', 'Image Name', and 'Code Set Group Name' fields are blank. The 'IB Throttle Threshold' is also blank. On the right, there are checkboxes for 'Default Local Node', 'Local Node', 'Active Node' (checked), 'Non-Repudiation', and 'Segment Aware'. There are buttons for 'Copy Node', 'Rename Node', and 'Delete Node'. At the bottom, there are links for 'Contact/Notes' and 'Properties'.

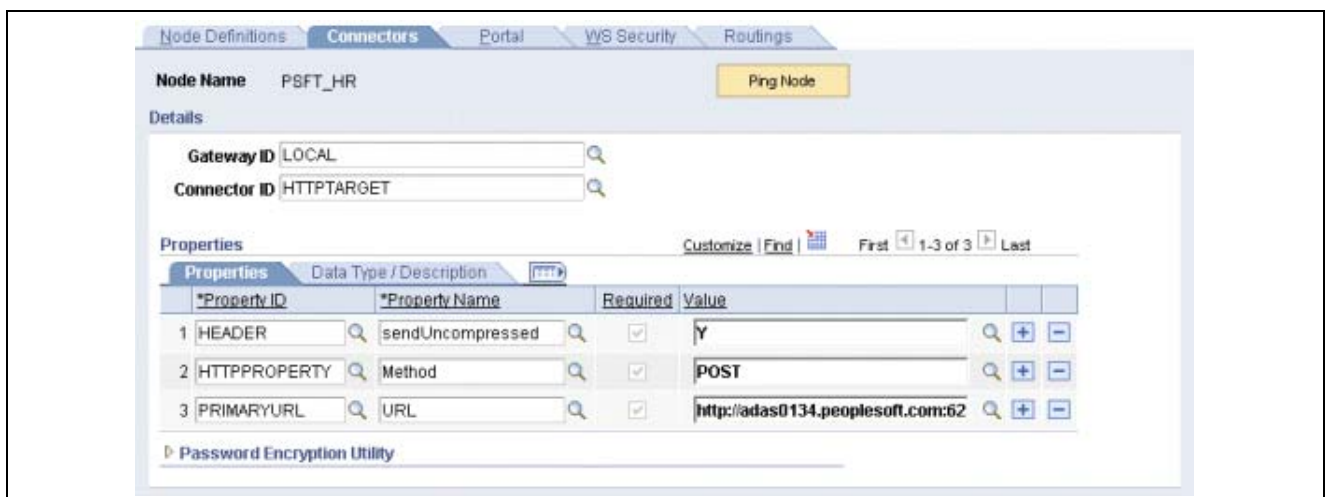
Node Definitions page for HD360\_83

The Node Type *ICType* is specific to the PeopleSoft 8.1x toolset, in this case PeopleSoft PeopleTools 8.19. For the PeopleSoft 8.4 toolset, the type is *PIA*. The type that you indicate determines how the URL resolves and generates at runtime.

The *Hub Node*, *Master Node*, *Company ID*, *Image Name*, and *Code Set Group Name* fields are intentionally left blank. They are not necessary.

3. Accept the defaults (blank) on the Contacts and Properties tabs.
4. Select the Connectors tab.

The Connectors page appears.



The screenshot shows the 'Connectors' page for 'PSFT\_HR'. The 'Gateway ID' is 'LOCAL' and the 'Connector ID' is 'HTTPTARGET'. The 'Ping Node' button is visible. Below the 'Details' section, there is a 'Properties' table with the following data:

*Property ID	*Property Name	Required	Value
1 HEADER	sendUncompressed	✓	Y
2 HTTPPROPERTY	Method	✓	POST
3 PRIMARYURL	URL	✓	http://adas0134.peoplesoft.com:62

At the bottom, there is a link for 'Password Encryption Utility'.

Connectors page

5. Select the Gateway ID as *Local* and Connector ID as *HTTPTARGET*.

The HEADER, HTTPPROPERTY, and PRIMARYURL property IDs automatically populate.

6. Modify the value of the PRIMARYURL as follows:

`http://<machinename>:<port>/servlets/xmllink/<PIA instance>/HRMS360`

For example: `http://phas006.peoplesoft.com:7201/servlets/xmllink/h831pbxnt/HRMS360?userid=PS&pwd=PS`

7. Select the Portal tab.

The Portal page appears.

The screenshot shows the 'Portal' tab selected in the top navigation bar. The main content area is titled 'Node Name PSFT\_HR' and 'Details'. It contains the following fields and controls:

- Description:** PS HRMS - Local Node. To the right is a checkbox labeled 'Local Node'.
- Tools Release:** A text box containing '8.22.04'.
- Application Release:** A text box containing '8.00'.
- Content URI Text:** A text box containing 'http://adas0134.peoplesoft.com:6200/servlets/iclientservlet/EM\_HC831EIP\_TS101330/'. Above the text box is an example: 'Example: http://someserver/psc/pshome/'.
- Portal URI Text:** An empty text box. Above it is an example: 'Example: http://someserver/psp/pshome/'.

At the bottom of the form are two buttons: 'Save' and 'Return to Search'.

Portal page

8. Set the Content URI Text field to the web directory of your HR domain.

The URI has the following format:

`http://<machine_name>:<port>/servlets/iclientservlet/<PIA instance>/`

For example, `http://phas006.peoplesoft.com:7201/servlets/iclientservlet/h831pbxnt/`

9. Click Save.

## Task 8-10: Creating an Action Link Node in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To create an action link node in the PeopleSoft CRM database:

1. Select Home, PeopleTools, Portal, Node Definitions.
2. Click Add a New Value, and enter the appropriate node name, as follows:

**Note.** It is important that you enter the correct node names in order for the links to work.

Application	Node Name
PeopleSoft HRMS 8.3 SP1	HRMS_83

The screenshot shows the 'Node Definitions' page with the following fields and values:

- Node Name:** HRMS\_83
- \*Description:** Portal Node - HRMS
- \*Node Type:** ICType
- \*Authentication Option:** None
- \*Default User ID:** (empty)
- Hub Node:** (empty)
- Master Node:** (empty)
- Company ID:** (empty)
- IB Throttle Threshold:** (empty)
- Image Name:** (empty)
- Code Set Group Name:** (empty)

Checkboxes on the right side:

- ☐ Default Local Node
- ☐ Local Node
- ☒ Active Node
- ☐ Non-Repudiation
- ☐ Segment Aware

At the bottom, there are links for [Contact/Notes](#) and [Properties](#), and a **Save** button.

Node Definitions page

Specify the following values on the Node Definitions page (all other information is optional):

- For Node Type, select *ICType*.
- For Authentication Option, select *None*.
- Select the Active Node check box.

The Connectors tab information is not necessary for this node.

3. Select the Portal tab.

Node Definitions Connectors **Portal** WS Security Routings

**Node Name** HRMS\_83

**Details**

**Description** Portal Node - HRMS ☒ **Local Node**

**Tools Release**

**Application Release**

**Content URI Text**  Example: http://someserver/psc/pshome/

**Portal URI Text**  Example: http://someserver/psp/pshome/

Portal page

4. Set the Content URI Text and Portal URI Text fields to the web directory of your HR domain.  
The URI has the following format: `http://<machine_name>:<port>/servlets/iclientservlet/<PIA instance>`  
For example: `http://phas006.peoplesoft.com:7201/servlets/iclientservlet/h831pbxnt/`
5. Save the node.

## Task 8-11: Setting the Password for the PeopleSoft CRM Default Local Node in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To set the password for the PeopleSoft CRM default local node:

1. Select Home, PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for the PeopleSoft CRM DEFAULT local node of PSFT\_CR (if PSFT\_CR is the PeopleSoft CRM DEFAULT local node).
3. Enter a password that matches the password on the PeopleSoft HRMS side for the PeopleSoft CRM DEFAULT local node of PSFT\_CR.

The screenshot shows the 'Node Definitions' page for a node named 'PSFT\_CR'. The 'Description' is 'PSFT CRM - Local Node' and the 'Node Type' is 'PIA'. The 'Authentication Option' is set to 'Password'. The 'Password' field is masked with dots. The 'Default User ID' is 'VP1'. There are checkboxes for 'Default Local Node', 'Local Node', 'Active Node', 'Non-Repudiation', and 'Segment Aware'. Buttons for 'Copy Node' and 'Rename Node' are in the top right. At the bottom, there are links for 'Contact/Notes' and 'Properties'.

Node Definitions page for PSFT\_CR

## Task 8-12: Adding an Authentication Domain in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To add the authentication domain in PeopleSoft CRM:

1. Select PeopleTools, Web Profile, Web Profile Configuration.

The Web Profile Configuration page appears.

2. Add the authentication domain as `.<domain>.com` (for example: `.peoplesoft.com`).

The screenshot shows the 'Web Profile Configuration' page for a profile named 'DEV'. The 'Description' is 'Installation Defaults'. The 'Authentication Domain' is '.peoplesoft.com'. There are checkboxes for 'Compress Responses', 'Compress Response References', and 'Compress Query'. The 'Compress Mime Types' field is set to 'application/javascript, text/javascript, text/css, text/html'. The 'Save Confirmation Display Time' is set to '3,000' milliseconds. A left-hand navigation pane shows the tree structure: PeopleTools > Security > Utilities > Workflow > Portal > Search Engine > Personalization > Process Scheduler > Cube Manager > Application Engine > Integration Broker > REN Server Configuration > MultiChannel Framework > Archive Data > Data Archive Manager > Translations > EDI Manager > Mass Changes > Performance Monitor > Web Profile > Web Profile Configuration.

Web Profile Configuration page

- Restart the web domain.

## Task 8-13: Activating the Link Category Definition in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To activate the link category definition for PeopleSoft HRMS 8 or 8.3:

- Select Home, Set Up CRM, Product Related, Call Center, Link Category.

The Link Category search page appears.

- Search for the PeopleSoft HRMS version (8 SP1 or 8.3) that is integrated with PeopleSoft CRM 9.

### Link Category

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

Link Category:

begins with

Version:

=

8.3

Active Flag:


=

Long Description:

begins with

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

### Search Results

[View All](#)


First
1-5 of 5
Last

Link Category	Version	Active Flag	Long Description	Short Name
<a href="#">BENEF</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Benefits</a>	<a href="#">Benefits</a>
<a href="#">HRMS</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">HRMS</a>	<a href="#">Human Resources</a>
<a href="#">PAYR</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Payroll</a>	<a href="#">Payroll</a>
<a href="#">STOCK</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Stock</a>	<a href="#">Stock</a>
<a href="#">TRNG</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Training</a>	<a href="#">Training</a>

Link Category search page

Perform the next three steps for each link category.

- Click the Modify System Data button.



**Link Category Definition**

Description Appliances

Link Category Definitions Customize Find First 1 of 1 Last

Link Category	Version	Active Flag	Order	Short Name	Long Description
HRMS	8.3	Inactive	10	Human Resources	HRMS

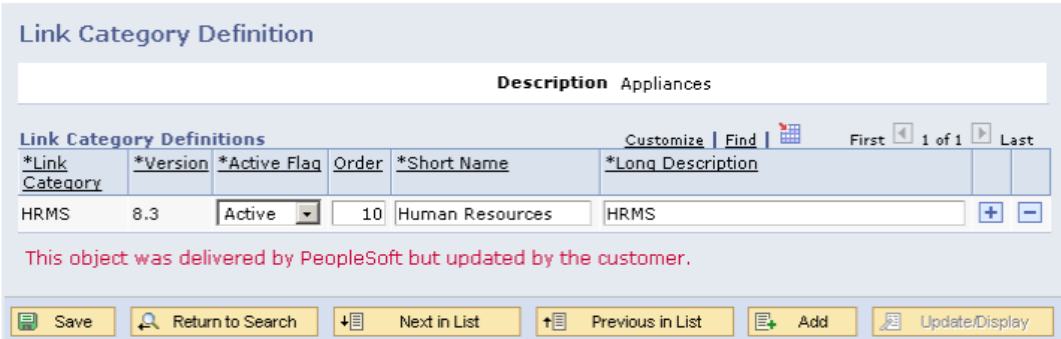
Modify System Data

This object is maintained by PeopleSoft.

Save Return to Search Next in List Previous in List Add Update/Display

Link Category Definition page

4. Select *Active* from the Active Flag drop-down list box.



**Link Category Definition**

Description Appliances

Link Category Definitions Customize Find First 1 of 1 Last

*Link Category	*Version	*Active Flag	Order	*Short Name	*Long Description
HRMS	8.3	Active	10	Human Resources	HRMS

This object was delivered by PeopleSoft but updated by the customer.

Save Return to Search Next in List Previous in List Add Update/Display

Modified Link Category Definition page

5. Click Save.
6. Repeat steps 3 through 5 for each link category.

**Note.** PeopleSoft CRM 9 and PeopleSoft HCM 8.9 deliver active action links. If you are integrating with PeopleSoft HCM 8.3, you must de-activate the PeopleSoft HCM 8.9 categories and activate the PeopleSoft HCM 8.3 categories.

## Task 8-14: Setting Up the Link Group in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

To set up the link group in PeopleSoft CRM:


1. Select Home, Set Up CRM, Product Related, Call Center, Link Group.  
The Link Group search page appears.
2. Click Search and select *HRMS* from the Search Results list.

**Link Group**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

**Link Group ID:** begins with

**Description:** begins with

[Basic Search](#)  [Save Search Criteria](#)

**Search Results**  
View All First  1-10 of 10  Last

Link Group ID	Description
<a href="#">COM</a>	<a href="#">Communications</a>
<a href="#">ENG</a>	<a href="#">Energy</a>
<a href="#">FIN</a>	<a href="#">Financials</a>
<a href="#">GOV</a>	<a href="#">Government</a>
<a href="#">HDREL</a>	<a href="#">Helpdesk Related Actions</a>
<a href="#">HITEC</a>	<a href="#">Hi-Technology</a>
<a href="#">HRMS</a>	<a href="#">HR Helpdesk</a>
<a href="#">INS</a>	<a href="#">Insurance</a>
<a href="#">SACT</a>	<a href="#">Suggested Actions</a>
<a href="#">SPRT</a>	<a href="#">Support Related Actions</a>


Link Group search page


3. Select the System Data tab and click the System Data button on each of the rows.

**Link Group**  
**Link Group**

**Link Group** HRMS

**\*Description**

**Link Selection** [Customize](#) [Find](#)  First  1-53 of 53  Last

**Links** **System Data** 

System Data	Message Description	Date Modified	Modified By		
<input type="button" value="System Data"/>	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="button" value="System Data"/>	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="button" value="System Data"/>	This object is maintained by PeopleSoft.	12/16/2004 4:26PM		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="button" value="System Data"/>	This object is maintained by PeopleSoft.	12/16/2004 4:26PM		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="button" value="System Data"/>	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="button" value="System Data"/>	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		<input type="button" value="+"/>	<input type="button" value="-"/>

Link Group - System Data page

4. Select the Links tab and then select 8.3 in the Version field for each of the rows.



**Link Group**  
Link Group

**Link Group** HRMS

**\*Description** HR Helpdesk

**Link Selection** Customize Find First 1-40 of 40 Last

*Link Category	*Version	*Link Name		
Benefits	8.3	Election Entry	+	-
Benefits	8.3	Benefits Summary	+	-
Benefits	8.3	Dependents/Beneficiaries	+	-
Benefits	8.3	Disability Plans	+	-
Benefits	8.3	Create Event	+	-
Benefits	8.3	FSA Plans (CAN)	+	-

Link Group - Links page

5. Delete any rows where the value in the Link Name field is *(Invalid Value)*.
6. Save your changes.

## Task 8-15: Copying the PeopleSoft HRMS CREF Project in PeopleSoft CRM

Perform this task on the PeopleSoft CRM database.

Use PeopleSoft Application Designer to import into the PeopleSoft CRM database the HRMS83\_CREFS project that corresponds to PeopleSoft HRMS 8.3 SP1.

To copy the PeopleSoft HRMS CREF project, select Tools, Copy Project, From File.

This project file is delivered on the PeopleSoft CD and should be installed on the specified Microsoft Windows File Server under the following directory:

<PS\_HOME>\projects\HRMS83\_CREFS

**Note.** <PS\_HOME> refers to the location where you installed PeopleSoft PeopleTools on the Microsoft Windows File Server.

## Task 8-16: Rebooting the PeopleSoft CRM Application and Web Servers

Perform this task on the PeopleSoft CRM database.

To reboot the PeopleSoft CRM application and web servers:

1. Clear the cache and reboot the application server.
2. Reboot the web server.

---

## Task 8-17: Testing Action Links and the HRHD 360-Degree View in PeopleSoft CRM

This section discusses:

- Testing Action Links
- Testing the HRHD 360-Degree View

### Task 8-17-1: Testing Action Links

Perform this task on the PeopleSoft CRM database.

Use PeopleSoft Pure Internet Architecture to log in to the PeopleSoft CRM database as HHDUSA\_AGT3/HHDUSA\_AGT3 to complete the procedures within this task.

To test action links:

1. Select Home, HelpDesk.
2. Click the second Add Case link.  
This action adds a new case in PeopleSoft HelpDesk for HR.
3. Select the More tab in the Case Information region.
4. Select the business unit *HR Help Desk USA*.
5. Search for the employee ID KU0113.
6. Enter a summary and description.
7. Click Save Case.

**Case**

Save Print Spell Check 360-Degree View Notification Text Tray Personalize

Case ID New Employee ID KU0113 Status Open - New  
Employee Name Cassandra Jacobson  
Contact Method 101 Little Rd, Springboro, OH, 45066, USA

Case Solution (0) Summary Notes (0) Tasks (0) Case History Related Actions (0)

**Employee Information**

Employee Cassandra Jacobson  
National ID  
Alternate Contact  
Contact Method 101 Little Rd, Springboro, OH, 45066, USA  
Reported By Cassandra Jacobson

Show Details Search Again

**Case Information**

Main More

\*Business Unit HR Help Desk USA  
Source Direct Call  
Response Met Not Applicable  
Restore Met Not Applicable

Entitled Response  
Actual Response  
Entitled Restore  
Actual Restore

Interested Parties  
There are no Interested Parties for this Case.  
Add Interested Parties

**Actions**

Suggested Action

Description	Human Resources	Benefits	Payroll	Stock	Training
Personal Data	Go	Health Plans	Go	Paycheck - US	Go
Stock Exercise	Go	Training Summary	Go		

Case page

8. Select any link from the Actions region and click the Go button.

This action launches a new window and opens an HR page without any errors.

For example, select *Personal Data* from HR and click Go. This opens the Personal Data page from the Human Resources database as follows:

Name History Address History Personal History Identity/Diversity

EmplID: KU0113 Employee

Name Type First 1 of 1 Last

\*Type of Name: Primary

Name History First 1 of 1 Last

Effective Date: 04/01/1999  
Format Using: USA United States Refresh the Name Field

Person Name

Prefix: First: Cassandra Middle: Last: Jacobson Suffix: Name: Jacobson, Cassandra

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

Name History | Address History | Personal History | Identity/Diversity

Personal Data - Name History page

## Task 8-17-2: Testing the HRHD 360-Degree View

Perform this task on the PeopleSoft CRM database.

Use PeopleSoft Pure Internet Architecture to log in to the PeopleSoft CRM database as HHDUSA\_AGT3/HHDUSA\_AGT3 to complete the procedures within this task.

To test the HRHD 360-Degree view:

1. Select HRHD Worker 360-Degree View from the menu.

The HRHD Worker 360-Degree View search page appears.

2. Enter *KU0113* in the EmplID field and click Search.



The screenshot displays the PeopleSoft interface for the HRHD Worker 360-Degree View search page. On the left, a vertical menu is visible with various options; 'HRHD Worker 360-Degree View' is highlighted. The main area on the right is titled 'Search For Worker' and contains a search form. The form includes input fields for 'Employee ID', 'First Name', 'Last Name', 'National ID', 'Home Address Country', 'Home Address State/Province', and 'Home Address City'. Below these fields are two buttons: a yellow 'Search' button and a blue 'Advanced Search' link.

HRHD Worker 360-Degree View search page

The Worker 360-Degree View and Worker record are populated with data that comes from the PeopleSoft HRMS database.

**360-Degree View**

Refresh New Search Notification Correspond Personalize

**360-Degree View** Tasks

Actions Add HR Helpdesk Case Go

**Summary**

<b>Name</b> Cassandra Jacobson	<b>Social Security Number</b> 238-12-0982
<b>Employee ID</b> KU0113	<b>Home Address</b> 101 Little Rd, Springboro, OH 45066, USA
<b>Home Phone</b>	<b>Business Email</b>
<b>Effective Date</b> 08/14/2002	<b>Date of Birth</b> 06/01/1964
<b>Gender</b> Female	<b>Marital Status</b> Married
<b>Emergency Contact</b>	

[View Worker Details](#)

**Activities**

\*Date Filter 6 - Last Year First Previous Next Last Left Right

**Overview of - Cassandra Jacobson**

- Cases**
  - HR HelpDesk Cases
    - Authorized Cases - (1)
      - Open - (1)
        - [View All](#)
    - Unauthorized Cases - (0)
      - [View All](#)
    - [Add HR Case](#)
    - [Search HR Cases](#)
  - IT HelpDesk Cases - (0)
    - [View All](#)
    - [Add IT Case](#)
    - [Search IT Cases](#)
  - Interactions - (0)**

† Date filter does not apply to this node

**Authorized Cases**

[Show All Columns](#)

Case ID	Summary	Priority	Status
220496	test	Medium	Open - New

Find View All First 1 of 1 Last

[Add Interaction Note](#)

[Current Actions](#)

Worker 360-Degree Overview View page

HR Information																											
<b>As Of Date</b>		<input type="text" value="06/09/2006"/>	<input type="button" value="OK"/> <input type="button" value="Go"/>																								
<b>Job and Position Summary</b>		First <input type="button" value="4"/> 1 of 4 <input type="button" value="B"/> Last																									
<b>Job Code</b>	KU099	<b>Job Description</b>	HRIS Specialist																								
<b>Date of Hire</b>	04/01/1999	<b>Person Type</b>																									
<b>Employment Status</b>	Active	<b>Employment Status</b>	04/01/1999																								
		<b>Date</b>																									
<b>Position</b>	HRIS Specialist	<b>Business Unit</b>	GBIBU																								
<b>Company</b>		<b>Location</b>	Corporation Headquarters																								
<b>Establishment</b>		<b>Department</b>	Human Resources																								
<b>Supervisor EmplID</b>		<b>Supervisor Name</b>																									
<b>Regular/Temporary</b>	Regular	<b>Full/Part Time</b>	Full-Time																								
<b>Standard Hours</b>	40.00	<b>Work Period</b>																									
<b>Labor Agreement</b>		<b>Employee Category</b>																									
<b>Payroll System</b>	Payroll for North America																										
<b>Pay Summary</b>																											
Secured	NO ACCESS TO COMPONENT PAY_CHECK																										
<b>Benefits Information</b>		First <input type="button" value="4"/> 1 of 2 <input type="button" value="B"/> Last																									
<b>Benefit Record Number</b>	1	<b>Currency Code</b>	USD																								
<b>COBRA Event Identification</b>	0																										
<b>Benefits</b>		<b>Dependents/Beneficiaries</b>																									
No Benefits exist for this Person.		<table border="1"> <thead> <tr> <th>Name</th> <th>Relationship</th> <th>Type of Benefit</th> <th>Coverage</th> </tr> </thead> <tbody> <tr> <td>Palooka,Patrick</td> <td>Spouse</td> <td></td> <td></td> </tr> <tr> <td>Hayster,Darren</td> <td>ExSpouse</td> <td></td> <td></td> </tr> <tr> <td>Jacobson,Buford D</td> <td>Son</td> <td></td> <td></td> </tr> <tr> <td>Jacobson,Lacy D</td> <td>Daughter</td> <td></td> <td></td> </tr> <tr> <td>Palooka,Wanda</td> <td>Daughter</td> <td></td> <td></td> </tr> </tbody> </table>		Name	Relationship	Type of Benefit	Coverage	Palooka,Patrick	Spouse			Hayster,Darren	ExSpouse			Jacobson,Buford D	Son			Jacobson,Lacy D	Daughter			Palooka,Wanda	Daughter		
Name	Relationship	Type of Benefit	Coverage																								
Palooka,Patrick	Spouse																										
Hayster,Darren	ExSpouse																										
Jacobson,Buford D	Son																										
Jacobson,Lacy D	Daughter																										
Palooka,Wanda	Daughter																										
<b>Direct Reports</b>																											
No Direct Reports exists for this person.																											
<input type="button" value="Refresh"/>   <input type="button" value="New Search"/>   <input type="button" value="Notification"/>   <input type="button" value="Correspond"/>																											
<a href="#">Top of Page</a>																											

Worker Detail page

## CHAPTER 9

# Installing the PeopleSoft CRM 9 Portal Pack

This chapter discusses:

- Understanding the PeopleSoft CRM 9 Portal Pack Installation
- Granting Access to the PeopleSoft CRM 9 Portal Pack Homepage Personalization
- Accessing PeopleSoft CRM 9 from PeopleSoft 8.9x Enterprise Portal

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## Understanding the PeopleSoft CRM 9 Portal Pack Installation

This chapter provides instructions for the installation and setup of Oracle's PeopleSoft Enterprise CRM Portal Pack and related components.

If you use the PeopleSoft CRM Portal Pack without the Enterprise Portal, you must enable users to personalize their Portal Pack homepage. If you have implemented the Enterprise Portal and want to access PeopleSoft CRM 9 from within the Enterprise Portal database, you must set up a link to PeopleSoft CRM 9 and enable Single Signon.

---

**Note.** All tasks in this chapter must be completed for both the System and Demo databases, unless otherwise indicated in the task.

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**Note.** Before proceeding with the installation, consult Oracle's PeopleSoft Customer Connection website to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks.

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**Note.** In addition, consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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## Task 9-1: Granting Access to the PeopleSoft CRM 9 Portal Pack Homepage Personalization

This section discusses:

- Updating the Homepage Personalization Permission List
- Adding the Portal User Role to the User IDs

## Task 9-1-1: Updating the Homepage Personalization Permission List

To add, remove or change the layout of the homepage, the homepage personalization security access must be granted to all non-guest users.

To update the homepage Personalization Permission List:

1. Sign on with PeopleSoft Data Mover to the PeopleSoft CRM 9 database.
2. Open the Data Mover script `<PS_HOME>\scripts\ PORTAL_HP_PERS.DMS`.
3. Run this script against the PeopleSoft CRM 9 database.
4. Close PeopleSoft Data Mover.

## Task 9-1-2: Adding the Portal User Role to the User IDs

To add the Portal User Role to the User IDs:

1. Sign on with PeopleSoft Data Mover to the PeopleSoft CRM 9 database.
2. Open the PeopleSoft Data Mover script `<PS_HOME>\scripts\ PORTAL_ADD_ROLE.DMS`.
3. Run this script against the PeopleSoft CRM 9 database.
4. Close PeopleSoft Data Mover.

---

**Note.** The PAPP\_USER and PeopleSoft Guest role should be granted to all new User IDs for access to the Homepage personalization and left pane navigation menu. After running this script, manually remove the role PAPP\_USER from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

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## Task 9-2: Accessing PeopleSoft CRM 9 from PeopleSoft 8.9x Enterprise Portal

The installation phase of your PeopleSoft application should only entail setting up a single link to the application content provider, PeopleSoft CRM 9.

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**Note.** Perform this task only if you own the PeopleSoft Enterprise Portal product and want to access your application from within the PeopleSoft Enterprise Portal database.

---

To set up the link and the Single Signon, see the *PeopleSoft Enterprise Portal Solutions 8.9 Installation* document on Oracle's PeopleSoft Customer Connection at <http://www4.peoplesoft.com/cc/>. See the table of contents for chapters about setting up Single Signon to your application database and accessing the PeopleSoft content providers.

See *Portal Products 8.4 Installation Guide*, PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, Portal Products).

---

**Note.** When you begin your implementation phase, refer to the Enterprise Portal 8.4x - Implementing Navigation and Portal Packs document on Oracle's PeopleSoft Customer Connection. This documentation discusses your options and how to handle the PeopleSoft content provider navigation and where to find all the necessary scripts, projects and documentation.

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See "Enterprise Portal 8.4x - Implementing Navigation and Portal Packs," PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, Portal Products).



## CHAPTER 10

# Installing the PeopleSoft Advanced Configurator 9

This chapter discusses:

- Understanding the PeopleSoft Advanced Configurator Installation
- Reviewing the Installation Process and Requirements
- Installing the WebLogic Application Server on Microsoft Windows
- Installing the PeopleSoft Advanced Configurator Server on Microsoft Windows
- Starting and Configuring the PeopleSoft Advanced Configurator Server on Microsoft Windows
- Installing the PeopleSoft Advanced Configurator on Solaris
- Installing the WebLogic Application Server on Solaris
- Installing the PeopleSoft Advanced Configurator Server on Solaris
- Starting and Configuring the PeopleSoft Advanced Configurator Server on Solaris
- Installing the PeopleSoft Visual Modeler
- Installing for Integration to PeopleSoft Order Capture
- Installing Multiple Configurator Instances on Microsoft Windows (Optional)

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## Understanding the PeopleSoft Advanced Configurator Installation

This chapter provides instructions for the installation and setup of Oracle's PeopleSoft Enterprise Advanced Configurator server and related components.

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**Note.** Before proceeding with your installation, check My Oracle Support to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.50 (or higher) Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks.

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**Note.** In addition, you should consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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**Note.** Before attempting to install Advanced Configurator, please refer to PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements available on Customer Connection for the latest supported platform information. Note that Advanced Configurator supports only a subset of the operating systems, Databases, WebServers, and so on that PeopleSoft PeopleTools supports.

---

See *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements*, “Defining Advanced Configurator Requirements.”

---

## Reviewing the Installation Process and Requirements

This section discusses:

- Prerequisites
- Reviewing the PeopleSoft Advanced Configurator Installation Process
- Understanding PeopleSoft Visual Modeler and PeopleSoft Advanced Configurator Server

### Prerequisites

Before you begin the PeopleSoft Advanced Configurator installation, thoroughly review the PeopleSoft Enterprise CRM 9 Hardware and Software Requirements guide, *Defining Advanced Configurator Requirements*, that describes the minimum hardware, software, database, and client browser requirements that your system must meet to install and run the PeopleSoft Enterprise Advanced Configurator software. The PeopleSoft Advanced Configurator supports only a portion of the operating systems, databases, and web servers that PeopleSoft PeopleTools supports.

See *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements*, “Defining Advanced Configurator Requirements.”

### Reviewing the PeopleSoft Advanced Configurator Installation Process

The following general steps are intended only for reference. They summarize the procedures for properly installing the PeopleSoft Enterprise Advanced Configurator components. Each of these steps is described in greater detail in subsequent tasks in this chapter. This summary applies to the installation on either Microsoft Windows or Solaris operating systems:

1. Install the BEA WebLogic Application Server 10.3 (hereafter known as WebLogic 10.3.1).

---

**Note.** The Java Development Kit (JDK) 1.6.0 is installed in subdirectories of WebLogic as part of the WebLogic 10.3.1 installation on Microsoft Windows and Sun Solaris. However, on IBM AIX you will need to separately download and install the appropriate JDK from IBM. Once it is downloaded, you will need to modify the execution PATH environment variable to ensure that the directory containing the javac executable is included in the path. This directory is usually the 'bin' directory of the JDK.

---

2. Install and configure the appropriate database for your system platform type.
3. Install the Advanced Configurator Server.

4. Configure WebLogic 10.3.1 and the PeopleSoft Enterprise Advanced Configurator Server. Restart the system if you are installing on a Microsoft Windows server.
5. If you are integrating with PeopleSoft Order Capture, perform the related setup at this stage.
6. Install PeopleSoft Visual Modeler.
7. Un-installing PeopleSoft Advanced Configurator components from your system requires that you follow a specific order of removal:
  - a. Remove Advanced Configurator Visual Modeler if it is installed on the same machine as the server.
  - b. Remove Advanced Configurator Server
  - c. Remove WebLogic 10.3.1.

## Understanding PeopleSoft Visual Modeler and PeopleSoft Advanced Configurator Server

Depending on the phase of model development, PeopleSoft Visual Modeler can be run as a standalone application or in conjunction with the PeopleSoft Enterprise Advanced Configurator Server. Thus, you can install them either on the same system or on different systems in a distributed network environment.

The PeopleSoft Enterprise Advanced Configurator Server was designed with technology that supports configuration modeling and runtime configuration processing. The PeopleSoft Visual Modeler is a hierarchical modeling tool that is used for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.

The PeopleSoft Enterprise Advanced Configurator Server uses a compiled version of a model defined with the PeopleSoft Visual Modeler. Configurations are created from user selections made against the model and the Configuration Server at runtime.

---

## Task 10-1: Installing the WebLogic Application Server on Microsoft Windows

This section discusses:

- Installing WebLogic
- Running WebLogic as a Service
- Changing the WebLogic System Password
- Uninstalling WebLogic

### Task 10-1-1: Installing WebLogic

This section describes the installation process of the WebLogic Application Server. The WebLogic 10.3.1 software provided with this release includes and installs JDK 1.6.0\_05.

To install the WebLogic application server:

1. Log in as Windows Server Administrator.
2. Insert the PeopleSoft Enterprise CRMWebLogic CD-ROM and install the file, server103\_win32.exe..

3. Select a location for the WebLogic server.

You should run Advanced Configurator on a different instance of WebLogic than other PeopleSoft applications. Thus, if WebLogic is already installed on this server, you should install another copy of WebLogic to a different directory to accommodate Advanced Configurator.

4. When the installation is complete, run Quick Start. The sample weblogic application will be started at port 7001. You can access the sample application page with `http://hostname:7001` on a web browser (where “hostname” is the name of your server).

---

**Note.** Oracle’s PeopleSoft Enterprise PeopleTools and PeopleSoft Enterprise Advanced Configurator Server must run on separate instances of WebLogic. Multiple instances of WebLogic can be run concurrently on the same server as long as they are all listening on different ports.

---

## Task 10-1-2: Running WebLogic as a Service

The PeopleSoft Enterprise Advanced Configurator Server is not affected by whether or not you run WebLogic 10.3.1 as a Windows Service on your system. However, if you do run it as a service, you must stop it in the Windows Services window before you attempt to un-install it.

---

**Important!** Oracle recommends that you do *not* set up WebLogic to run as a service. Instead, set up the PeopleSoft Advanced Configurator Server to run as a service.

---

Once you have installed WebLogic 10.3.1, its directory locations are mapped to variables used by the Advanced Configurator Server and Visual Modeler. These directory locations are important to the proper installation and operation of the PeopleSoft Enterprise Advanced Configurator Server. Do not move WebLogic 10.3.1 to another directory. If you must change its location, un-install and reinstall it rather than moving the WebLogic directories.

## Task 10-1-3: Changing the WebLogic System Password

You should install the PeopleSoft Enterprise Advanced Configurator Server before changing the WebLogic password. See the next section in this chapter for detailed instructions.

See "Installing the PeopleSoft Enterprise Advanced Configurator Server."

## Task 10-1-4: Uninstalling WebLogic

Select the uninstall utility provided by WebLogic as follows: Start, Programs, Oracle WebLogic, Uninstall Oracle WebLogic.

---

## Task 10-2: Installing the PeopleSoft Advanced Configurator Server on Microsoft Windows

This section discusses:

- Installing the PeopleSoft Advanced Configurator Server
- Changing the WebLogic System Password
- Uninstalling the Configuration Server

## Task 10-2-1: Installing the PeopleSoft Advanced Configurator Server

This section describes how to install the PeopleSoft Enterprise Advanced Configurator Server on a Windows Server system.

The installation of PeopleSoft Enterprise Advanced Configurator Server includes the optional creation of database tables if needed. However, the database and connectivity must already exist. The database can be the PeopleSoft Enterprise CRM database if you are installing PeopleSoft Enterprise Advanced Configurator for use with other PeopleSoft Enterprise CRM applications.

PeopleSoft Enterprise Advanced Configurator Server installation allows you to specify the port number of the PeopleSoft Enterprise CRM database if it is different from the default setting. Check with your database administrator if you are not sure of the appropriate port setting.

To install the PeopleSoft Advanced Configurator Server:

1. If you intend to use Microsoft SQL Server as a database server, then you should download the appropriate Microsoft JDBC driver from Microsoft's website now. At the time of print, version 1.2 was the latest version available. Follow the instructions provided by Microsoft to extract the sqljdbc4.jar file from the download. Copy this file to a directory that you will remember, for example, C:\temp, as you will need this file later in the install.
2. If you have not already installed WebLogic, do so now.

See Installing the WebLogic Application Server.

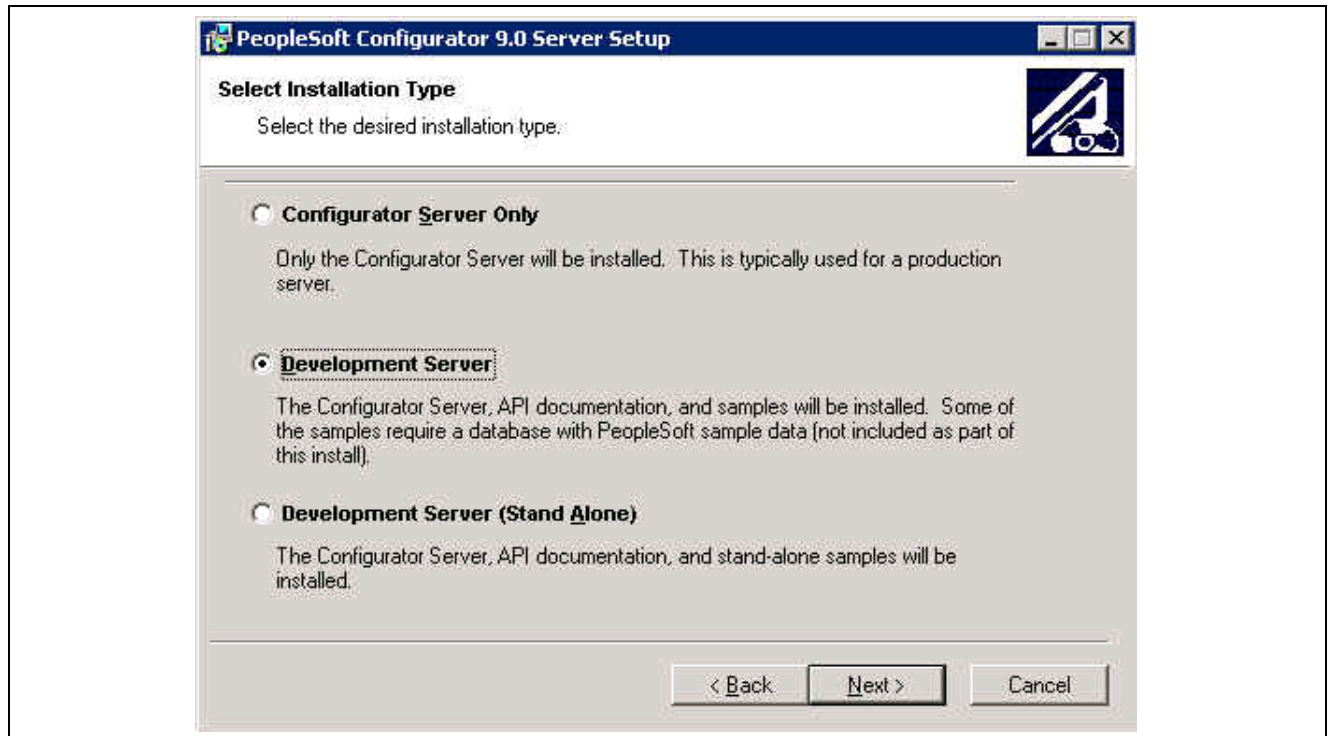
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**Note.** Note. If you are installing the PeopleSoft Enterprise Advanced Configurator WebLogic server in addition to an existing WebLogic server used for another application, install it in a separate location, such as \bea\_cfg\ rather than the default \bea.

---

3. Navigate to \$PS\_HOME\setup\Advanced Configurator\Server\Windows.
4. Double-click install.cmd. The following Window appears:
5. Click Next on the Welcome screen.
6. Accept the license agreement and click Next.

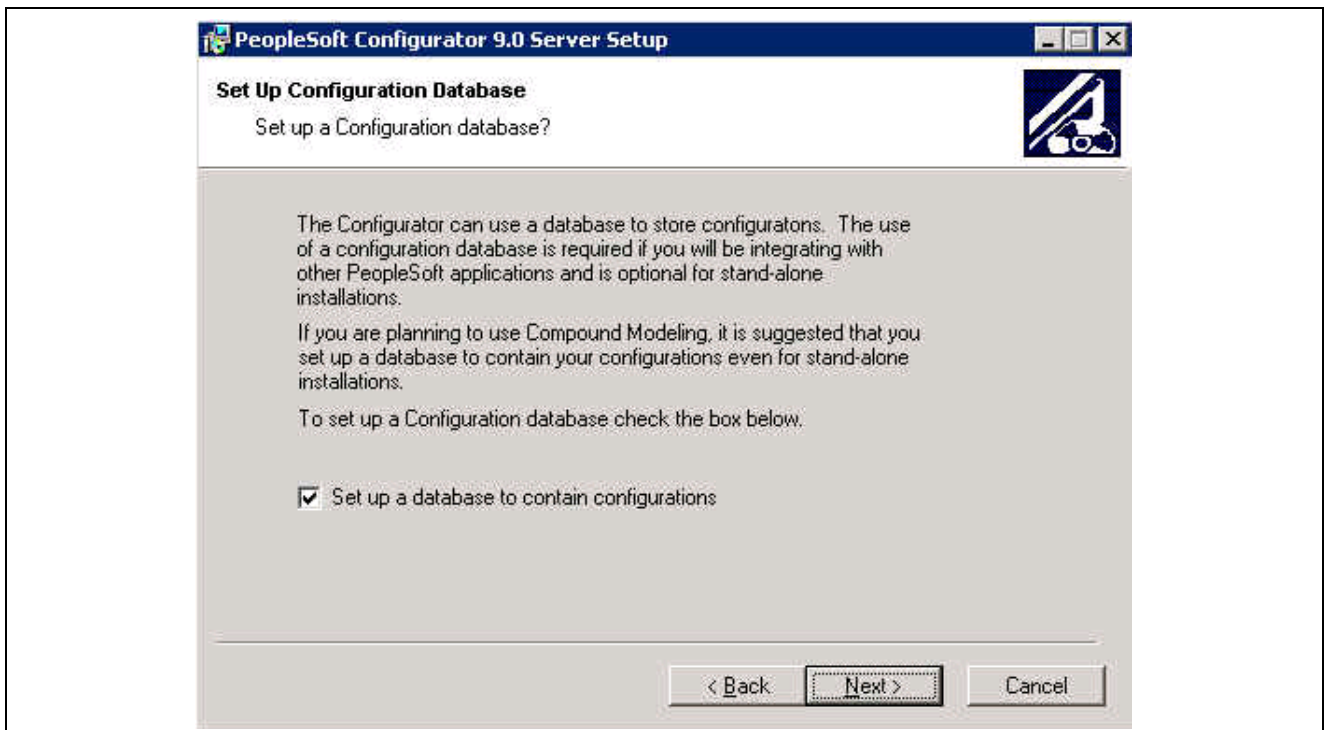
The Select Installation Type dialog box appears:



Select Installation Type dialog box

7. Select the option that allows the appropriate level of access to the PeopleSoft Enterprise Advanced Configurator Server to anyone who uses the machine or to anyone who uses the system ID that you logged in with. The Application Server Information dialog page appears:
8. The install program will search for BEA home directory and fills in the found directory. If you are using another directory for the WebLogic 10.3.1 server, or if you are using an existing WebLogic 10.3.1 installation with another application, enter its location in this dialog page.
9. Click Next.  
Accept the BEA home and Weblogic HOME settings, and the Adv Config Server Port Number dialog page appears:
10. Accept the default 7777 by pressing Enter or enter with your port number. The Configuration Database dialog page appears:
11. Accept the default 7777 by pressing Enter or enter with your port number. The Configuration Database dialog page appears:
12. The Set Up Configuration Database dialog box appears:

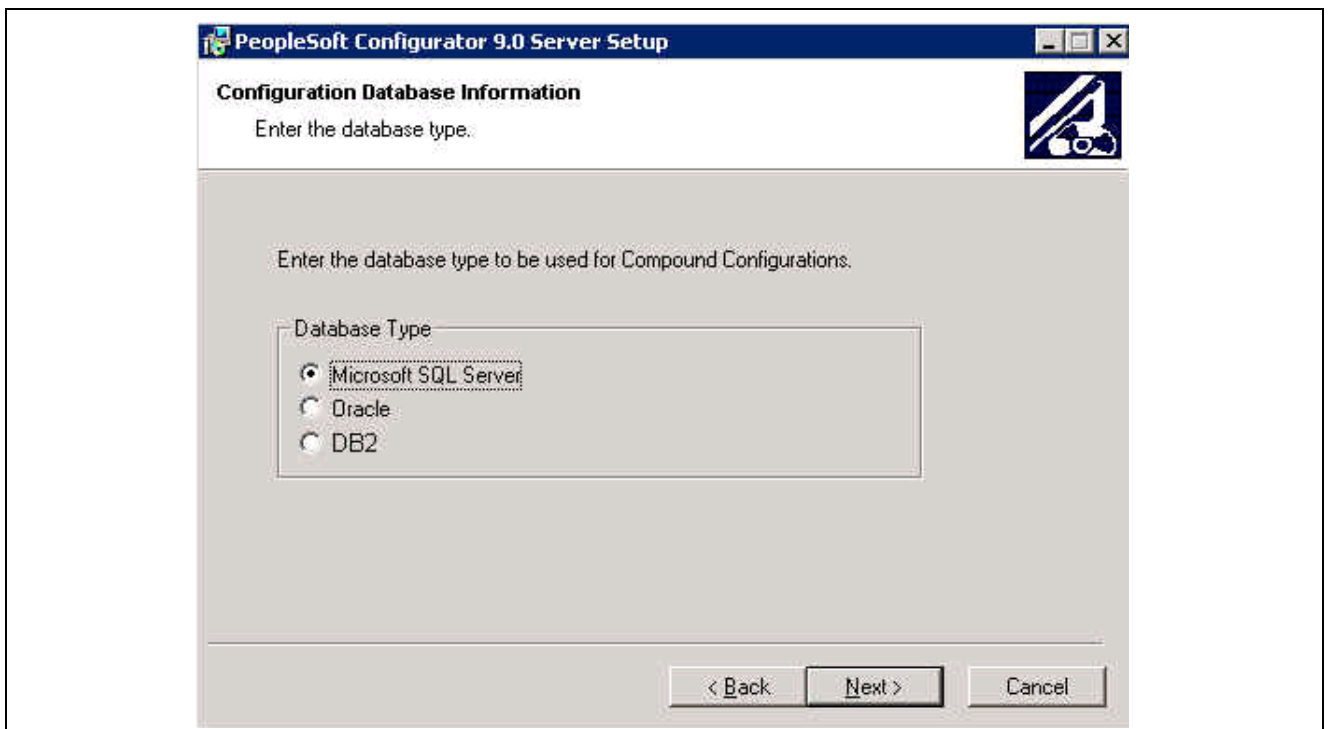




Set Up Configuration Database dialog box

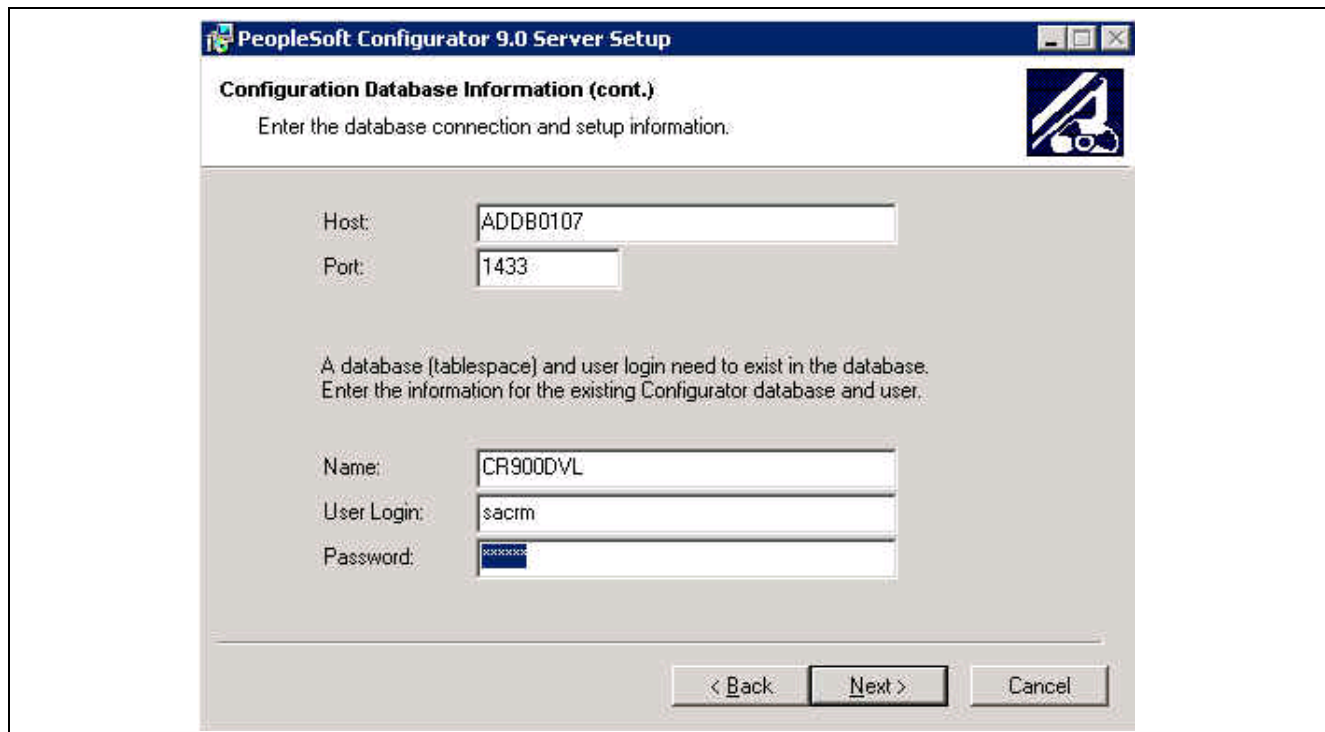
13. Select the check box and click Next.

The Configuration Database Information dialog box appears.



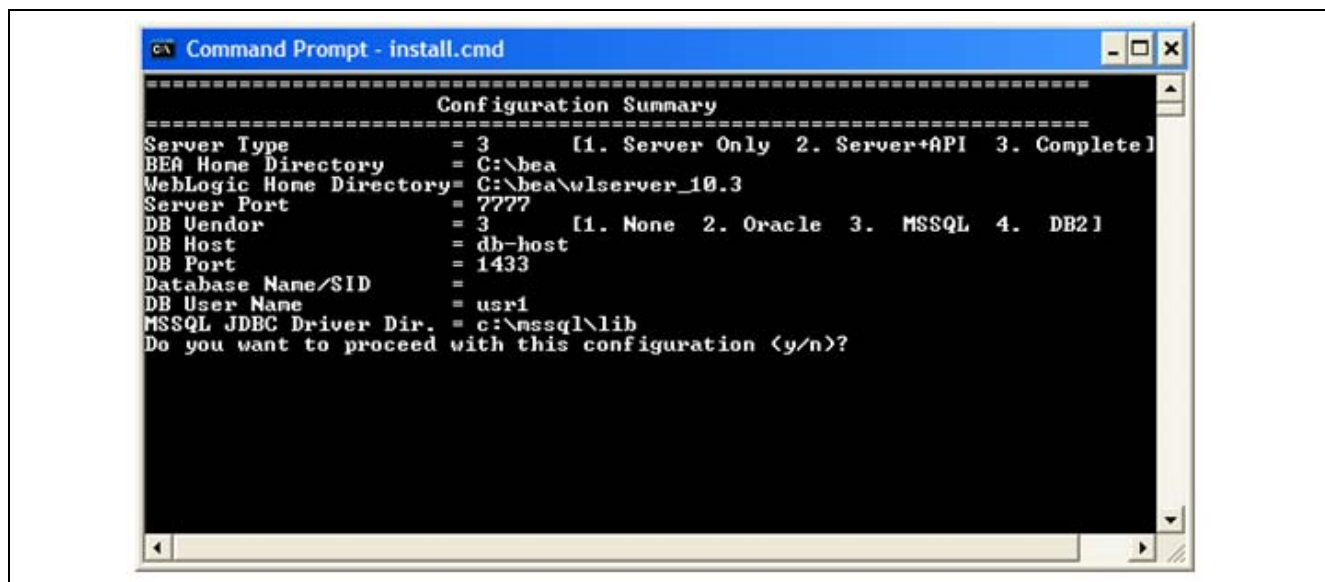
Configuration Database Information dialog box

14. Select the database that you are running, and the following dialog page appears



Configuration Database Information (cont.) dialog box

15. Enter the database information for the database that you intend to use for configuration and model data.
16. (MSSQL only) If MSSQL is your database of choice, the install program will prompt for the location of the Microsoft jdbc driver file (sqljdbc4.jar) that you downloaded earlier.
17. A Configuration Summary page appears.



Configuration Summary

18. Review the values. Enter 'y' to complete the installation, or 'n' to abort the installation.
19. It is not necessary to reboot the system when installation is complete.

The PeopleSoft Advanced Configurator Server installation creates the following directories:

- Directories found in:  
`\bea\wls10.3\config\CalicoDomain\applications\CalicoApp\Web-inf\`:
  - `config\`
  - `dtd\`
  - `lib\`
  - `logs\`
  - `models\`
  - `namodels\`
  - `nastructures\`
  - `sql\`
  - `structures\`
  - `xsd\`
- Installation-specific files found in:  
`\bea\wlserver_10.3\config\CalicoDomain\install\`
  - - `install.jar`
  - - `install.properties`
  - - `installprops.log`
- • The file `install.log` contains information about setup during installation (including error messages if any errors occurred). The system administrator can use `propupdate.cmd` and `install.properties` to rerun setup to aid in future troubleshooting or information gathering.  

For database connection pooling purposes, the `t3servername` property has been added to the `LEDBAcc.properties` file. The `t3servername` property has a default value of 'myserver' upon install. If the weblogic 10.3.1 server is installed or reconfigured with a server name other than 'myserver' the `t3servername` property in `LEDBAcc.properties` needs to be updated to reflect the actual server name.
- The `LEDBAcc.properties` file is located at: The `LEDBAcc.properties` file is located at:  
`<Weblogic10.3_Home>\config\CalicoDomain\applications\CalicoApp\Web-inf\config`.  
`<Weblogic10.3_Home>\config\CalicoDomain\applications\CalicoApp\Web-inf\config`.

## Task 10-2-2: Changing the WebLogic System Password

To change the WebLogic system password:

1. Select Start, Programs, PeopleSoft Applications, Configurator 9, Start Configurator Server to make sure PeopleSoft Enterprise Advanced Configurator server is running.
2. Go to the WebLogic management console by entering this URL in a browser: `http://<host_name>:port-number/console`
3. Log in as user=`system` and password=`<initial password, weblogic>`
4. Click the Users link under Compatibility Security.
5. Under "Change a User's Password" (to the far right side of the page), enter:d:
  - For Name, enter the name of the system..
  - For Old Password, enter *weblogic*.

- For Confirm Password, enter *<new password>*.
6. Click the Change button.
  7. . Click the link “The changes you have made must be saved to the realm implementation.”
  8. Stop the PeopleSoft Enterprise Advanced Configurator Server by running stopConfigurator.cmd from the server prompt.
  9. Locate startConfigurator.cmd and stopConfigurator.cmd in \bea\wlserver\_10.3\config\CalicoDomain and change set WLS\_PW=weblogic to set WLS\_PW=<the new password>
  10. If you have configured the PeopleSoft Enterprise Advanced Configurator Server as a service, because you changed startConfigurator.cmd, you must re-register the service.

Execute the following commands from the directory where startConfigurator.cmd resides:

```
startConfigurator.cmd remservice
startConfigurator.cmd cfgservice
```

11. Check for the existence of boot.properties. (By default, it will be in C:\bea\wlserver\_10.3\config\CalicoDomain.) If the file is present, replace the password value with the unencrypted new password.

Note that it will be encrypted upon boot up of the server

12. Restart the service from the Control Panel or reboot the system.

## Task 10-2-3: Uninstalling the Configuration Server

Before you uninstall the PeopleSoft Enterprise Advanced Configurator Server, first uninstall Visual Modeler, if it is present on the server. (Use the Add/Remove utility on the Control Panel to uninstall Visual Modeler.)

To uninstall the PeopleSoft Configuration Server:

1. Stop the Adv Configuration server
2. Remove the <bea home>\wlserver\_10.3\config/ directory

---

## Task 10-3: Starting and Configuring the PeopleSoft Advanced Configurator Server on Microsoft Windows

This section discusses:

- Starting the PeopleSoft Advanced Configurator Server on Microsoft Windows
- Running the PeopleSoft Enterprise Advanced Configurator from a Microsoft Command Window
- Install the Advanced Configurator as a Window Service
- Running the PeopleSoft Enterprise Advanced Configurator as a Window Service
- Resetting the Port
- Setting the XML Encoding Option (Optional)

## **Task 10-3-1: Starting the PeopleSoft Advanced Configurator Server on Microsoft Windows**

After you have installed the WebLogic application server and the PeopleSoft Enterprise Advanced Configurator Server, you need to start the PeopleSoft Enterprise Advanced Configurator Server. Starting the PeopleSoft Enterprise Advanced Configurator Server properly sets up the necessary system environment variables for the JDK/JRE, WebLogic 10.3.1, and the PeopleSoft Enterprise Advanced Configurator Server.

You can start the PeopleSoft Enterprise Advanced Configurator Server in one of two ways: •

- Run the startConfigurator.cmd file within a DOS command prompt from Microsoft Windows.
- If the server is running as a Microsoft Windows service, use the Services utility..

## **Task 10-3-2: Running the PeopleSoft Enterprise Advanced Configurator from a Microsoft Command Window**

After you have installed both the WebLogic server and the PeopleSoft Enterprise Advanced Configurator, you can start the Configuration Server from a DOS Command Window.

To run the PeopleSoft Enterprise Advanced Configurator from a Microsoft command window:

1. Open a command prompt window.
2. At the prompt, change the directory to C:\bea\wlserver\_10.3\config\CalicoDomain
3. Run startConfigurator.cmd with no parameter, the Configuration server will start

## **Task 10-3-3: Install the Advanced Configurator as a Window Service**

After you have installed both the WebLogic server and the PeopleSoft Enterprise Advanced Configurator Server, you can also set up PeopleSoft Enterprise Advanced Configurator Server to run as a service.

To set up the PeopleSoft Advanced Configurator to run as a service:

1. Open a command prompt window.
2. At the prompt, change the directory to C:\bea\wlserver\_10.3\config\CalicoDomain, the WebLogic directory containing startConfigurator.cmd.
3. Run the “startConfigurator cfgservice” to install the Advanced Configurator as a Window service
4. Select Start, Settings, Control Panel, Administrative Tools, Services, you will see a new service, “PeopleSoft Configurator Server” is installed.

## **Task 10-3-4: Running the PeopleSoft Enterprise Advanced Configurator as a Window Service**

To run the PeopleSoft Enterprise Advanced Configurator as a service:

1. To start the service, either reboot the server (the service is set to automatic) or use the Control Panel utility.
2. Select Start, Settings, Control Panel, Administrative Tools, Services.
3. Look for “PeopleSoft Configurator Server” in the list of services for the system.
4. Select Start Service for “PeopleSoft Configurator Server”

---

**Note.** To remove the service, run `C:\bea\wlserver_10.3\config\CalicoDomain> startConfigurator remservice`.

---

## Task 10-3-5: Resetting the Port

You can specify the port number when installing the Advanced Configuration Server. After the installation, you can change the port number using the Administration Console.

To change the server port:

1. Open the WebLogic administration console for the Calico Domain:  
`http://<hostname>:port-number/console`
2. Select CalicoDomain, Servers, myserver.
3. On the General tab, enter a new value for Listen Port
4. Click the Save button.
5. Restart the PeopleSoft Enterprise Advanced Configurator Server.

## Task 10-3-6: Setting the XML Encoding Option (Optional)

This step is optional.

Product configuration data created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter to the web.xml file.

---

**Note.** You should use the default UTF-8 or change the encoding to specify Internet Assigned Numbers Authority (IANA) encoding name.

---

To change XML output encoding:

1. Open the file web.xml file for editing located at the following:  
`C:\bea\wlserver_10.3\config\CalicoDomain\applications\CalicoApp\Web-inf`
2. Find the following lines in the XML file:
 

```
<servlet>
<servlet-name>copxml</servlet-name>
<servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet<se⇒
⇒
rvlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet<⇒
/servlet-class>
```
3. Create a new sub-element of the `<servlet>` element called `<init-param>`. Other sub-elements called `<init-param>` may already exist; do not modify them. Input your desired encoding in the param-value element; Shift-JIS is used here as an example.

```
<init-param>
  <param-name>encoding</param-name>
  <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the Advanced Configurator server.

---

## Task 10-4: Installing the PeopleSoft Advanced Configurator on Solaris

This section discusses:

- Understanding the PeopleSoft Advanced Configurator Installation
- Setting Up the Database

### Understanding the PeopleSoft Advanced Configurator Installation

This task provides you with reference information that is useful to know before installing this release of the PeopleSoft Enterprise Advanced Configurator Server.

For information about the minimum hardware, software, database, and client browser requirements that your system needs to meet to install this release on a Solaris system, see the Customer Relationship Management Hardware & Software Requirements Guide.

See *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements Guide*.

---

**Note.** The recommended product load order requires that WebLogic 10.3.1 and the PeopleSoft Enterprise Advanced Configurator Server be loaded before any further Weblogic Service Packs are applied. PeopleSoft Enterprise Advanced Configurator Server may not work or even install properly if you do not follow this load order.

---

### Task 10-4-1: Setting Up the Database

If you plan to develop or deploy a compound model, set up the database for it before you install the PeopleSoft Enterprise Advanced Configurator Server. However, if you only need a database for external model data, you can set it up later.

---

**Note.** PeopleSoft Enterprise Advanced Configurator supports the UNICODE character set by default. See the task titled, "Setting the XML Encoding Option," in this chapter for information on how to specify other character sets.

---

See "Installing the PeopleSoft Enterprise Advanced Configurator 9," Installing the PeopleSoft Visual Modeler on Microsoft Windows.

The database configuration information in this section is general in nature and assumes that you have already identified the type of database configuration you need. If not, you must contact your database administrator (DBA) for more information before installing and configuring your Oracle database and before installing the PeopleSoft Enterprise Advanced Configurator Server.

---

**Note.** This guide is not intended to replace the knowledge or assistance of an experienced Oracle Database Administrator.

---

- Database Server Requirements

The database server can be a different system than the one where the PeopleSoft Enterprise Advanced Configurator Server components are installed.

The database server you use with the PeopleSoft Enterprise Advanced Configurator Server must meet the following requirements:

- Allow the database user account to make a minimum of 100 concurrent connections to the system.
- Support 50 dedicated concurrent connections.
- • Set the value for the maximum number of extents for rollback segments to support 150 or more.

- Database Configuration Requirements

You must create a user account specifically for the PeopleSoft Enterprise Advanced Configurator Server, and the tablespace must be the default location for this user account. The System Identifier (SID) for the database account must have the necessary read-write permissions to create and drop tables or indexes and to insert, select, delete, or update any table in the dedicated tablespace.

Make a note of the tablespace, user ID (the Connect ID for PeopleSoft CRM applications), and password. You will need to refer to them during the PeopleSoft Enterprise Advanced Configurator Server installation.

---

## Task 10-5: Installing the WebLogic Application Server on Solaris

### Task 10-5-1: Installing WebLogic Application Server 10.3.1

1. Make sure that you have created a WebLogic user account (the default user is “weblogic”), and verify that you can log on as the WebLogic user before you attempt to install WebLogic 10.3.1.
2. Make sure that you have created a group for the WebLogic user (the default group is “weblogic”) and set permissions for it.

---

**Note.** Record the username and group permissions you use during setup. You may need to refer to them when you install the PeopleSoft Enterprise Advanced Configurator Server

---

3. Change the directory to the AppSrvr/Solaris directory on the temp directory created in the task “Installing the PeopleSoft Enterprise Advanced Configurator Server.”
4. Execute one of the following:
  - \$ ./server103\_solaris32.bin (for GUI mode install)
  - \$ ./server103\_solaris32.bin -mode=console (for console mode install)

After you have installed WebLogic 10.3.1 for the Advanced Configurator on your system, all of the directory locations are mapped to variables used by the Advanced Configurator Server. These directory locations are important to the proper installation and operation of the Advanced Configurator Server.



---

**Note.** Important! After the Advanced Configurator Server is up and running, do not move JDK, JRE, or WebLogic files to another directory location. If you do, you must reinstall the Advanced Configurator Server.

---

---

**Note.** For more detailed information, see <http://e-docs.bea.com/common/docs103/install/index.html>

---

## Task 10-5-2: Uninstalling the WebLogic Server

To uninstall WebLogic, you can either remove the entire bea directory (if WebLogic is the only BEA product installed) “rm -r \$HOME/bea” or use the WebLogic un-install utility.

For more information about this utility, see

<http://e-docs.bea.com/common/docs103/install/uninstal.html>

---

## Task 10-6: Installing the PeopleSoft Advanced Configurator Server on Solaris

This section discusses:

- Installing the PeopleSoft Advanced Configurator Server Installation on Solaris
- Changing the WebLogic System Password
- Uninstalling the PeopleSoft Enterprise Advanced Configurator Server

### Task 10-6-1: Installing the PeopleSoft Advanced Configurator Server Installation on Solaris

This section describes the process for installing the Advanced Configurator Server on a Solaris system.

The installation of Advanced Configurator Server includes the optional creation of database tables. However, the database and connectivity must already exist. The database can be the PeopleSoft Enterprise CRM database if you are installing with other PeopleSoft Enterprise CRM applications.

Advanced Configurator Server installation allows you to specify the port number of the Advanced Configurator database if it is different from the default setting. Check with your DBA if you are not sure of the appropriate port setting.

---

**Note.** Before proceeding with the Advanced Configurator Server installation, install the custom Advanced Configurator database or PeopleSoft CRM database. Make sure the database has a user login with permission to create tables.

---

To install the Advanced Configurator Server on Solaris:

1. If WebLogic 10.3.1 is not yet installed on the system, do so before proceeding.

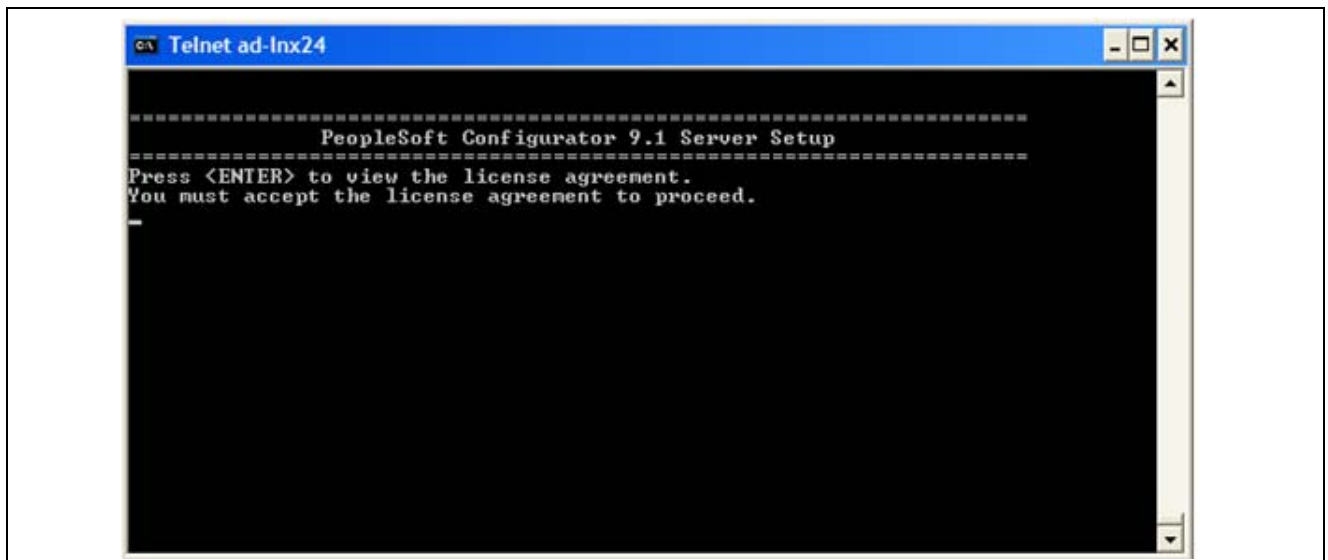
See "Installing the WebLogic Application Server on Solaris 9" that appears earlier in the chapter.

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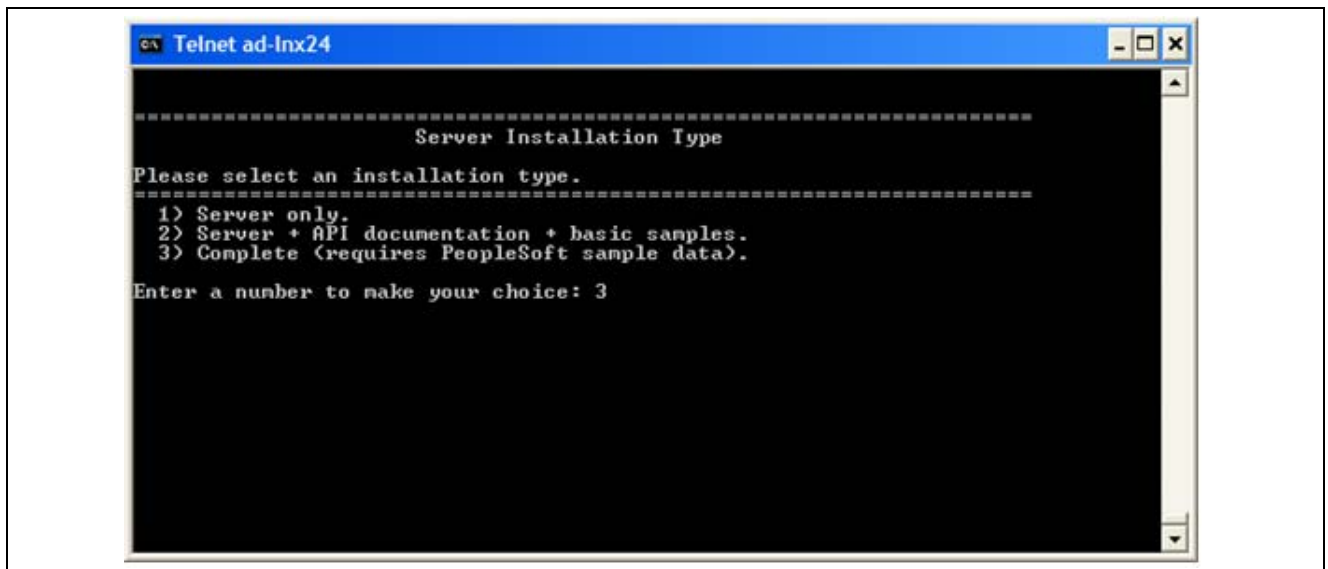
**Warning!** Do not install Advanced Configurator Server into the PeopleTools WebLogic application server.

---

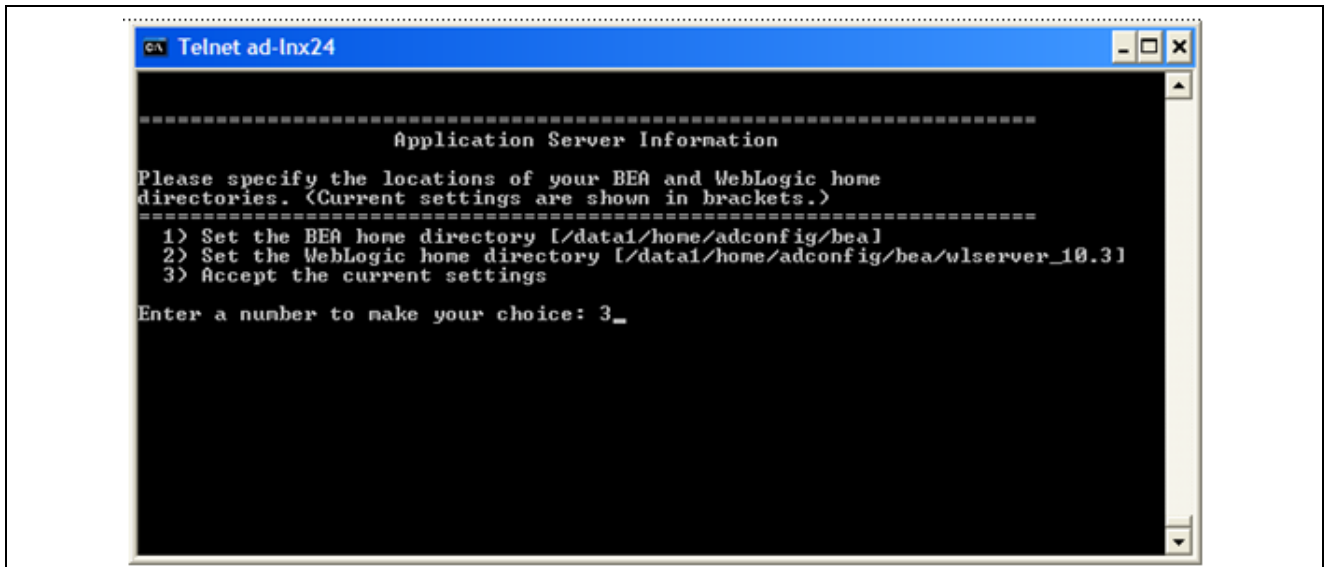
2. .Navigate to \$PS\_HOME/setup/Advanced Configurator/Server/Solaris/ to run the Configurator Server script, install.sh.
3. Follow the instructions to install and configure the server and database connection.



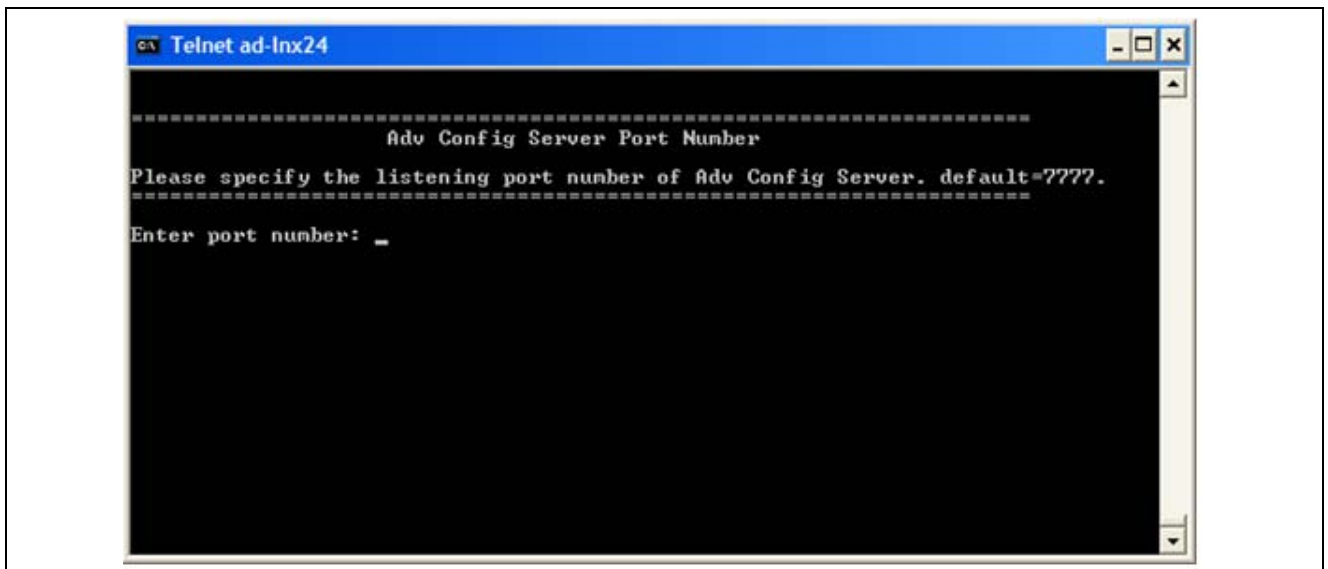
PeopleSoft Configurator 9.1 Server Setup page



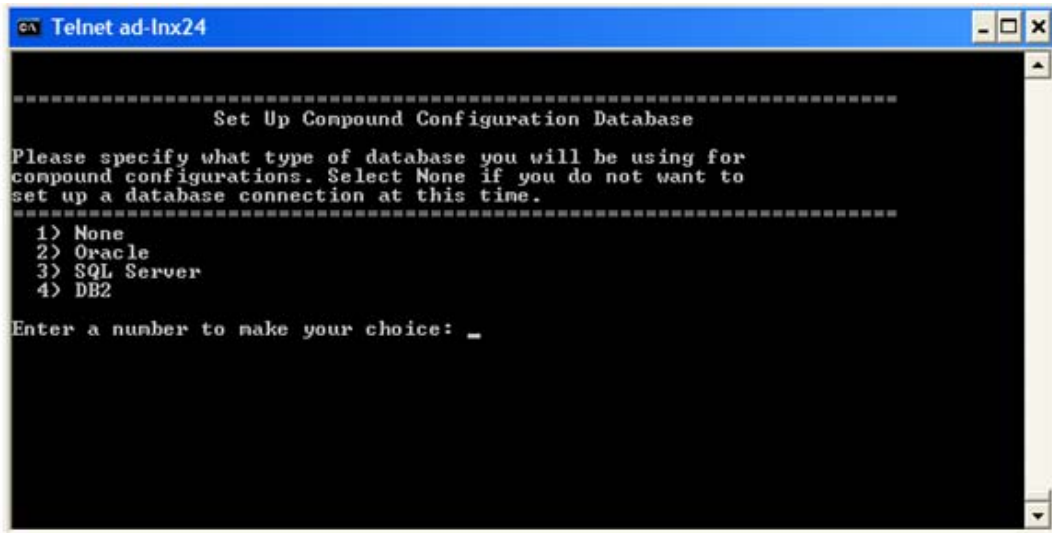
Server Installation Type page



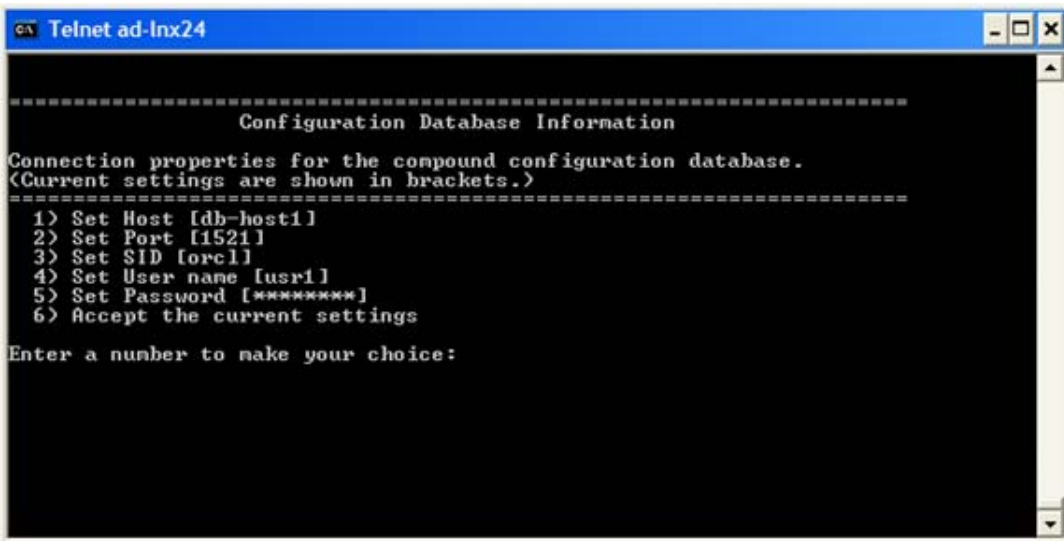
Application Server Information page



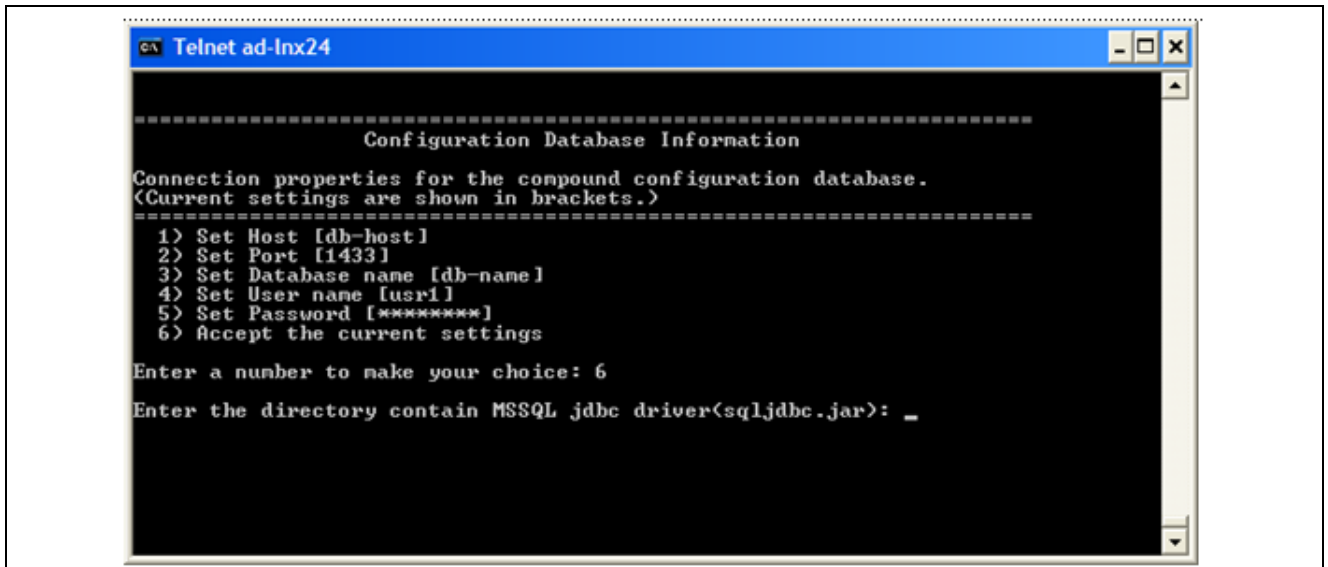
Advanced Configurator Server Port Number page



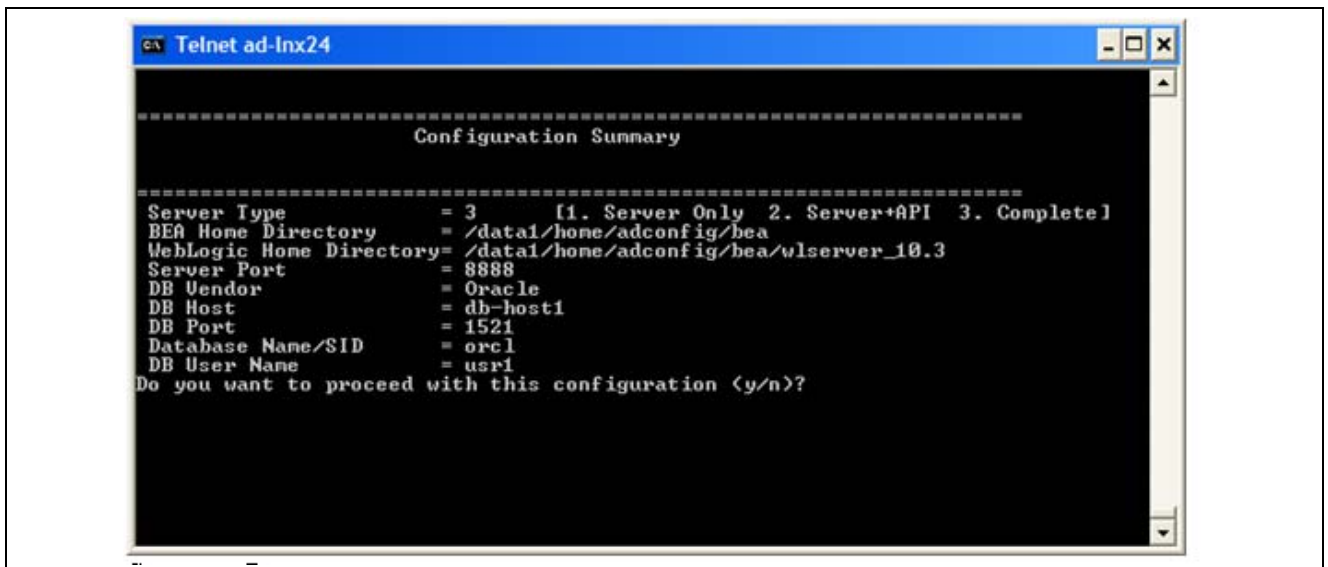
Set Up Compound Configuration Database page



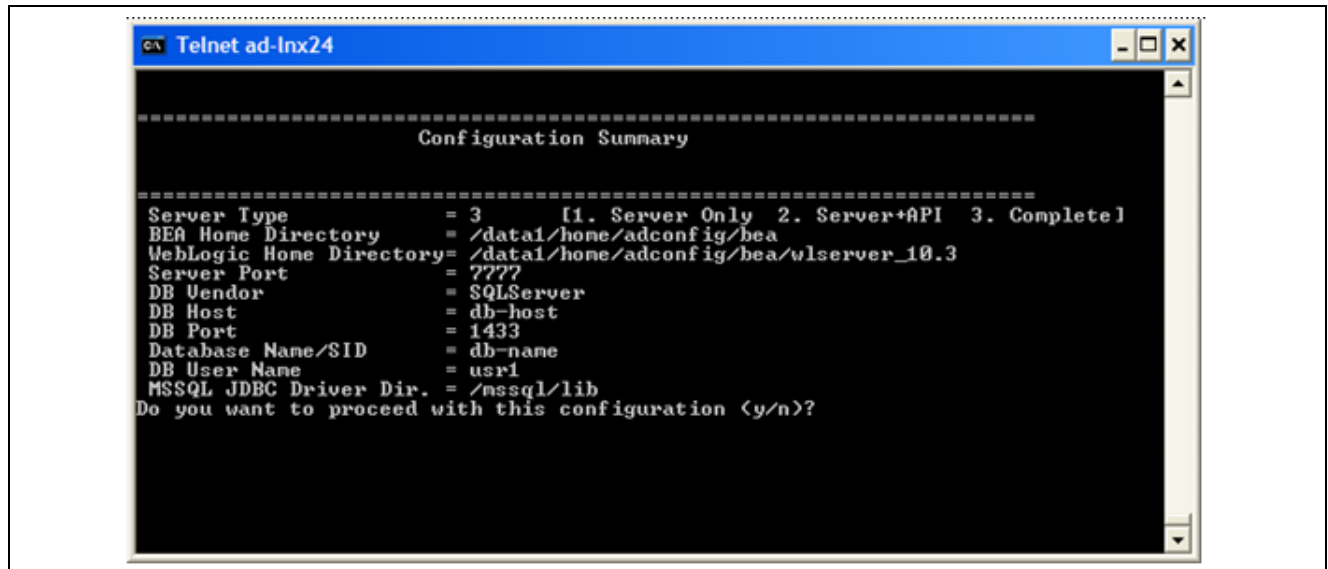
Configuration Database Information page



JDBC driver prompt for MSSQL page



Summary page



MSSQL Summary page

---

**Note.** In this release, WebLogic 10.3.1 installs JDK 1.6.0\_05 in its directory structure. The default path to the JDK is `/$HOME/bea/wlserver_10.3/jdk160_05`.

---

When installation is complete, the following 10 new directories and two files will appear under the directory `/$HOME/bea/wlserver_10.3/config/CalicoDomain/applications/CalicoApp/WEB-INF`:

- config/
- dtd/
- lib/
- logs/
- models/
- namodels/
- nastructures/
- sql/
- structures/
- xsd/
- web.xml
- weblogic.xml

## Task 10-6-2: Changing the WebLogic System Password

You should change the WebLogic system password for production systems.

To change the default WebLogic system password:

1. Enter the following URL in a browser to open the WebLogic management console:  
`http://<host_name>:port-number/console`
2. Log in as `anduser=system, password=<old WebLogic system password>`.

3. Click the Users link under Compatibility Security.
4. Under Change a Users Password (to the far right side of the page), enter the following:
  - For Name, enter *System*.
  - For Old Password, enter *<old WebLogic system password>* (weblogic by default).
  - For Confirm Password, enter *<new WebLogic system password>*.
5. Click the Change button.
6. Click the link The changes you have made must be saved to the realm implementation.
7. Stop the server.
8. Check for the existence of the boot.properties file. (By default, it will be in *<WLHome>/config/CalicoDomain*.) If the file is present, replace the password value with the unencrypted new password.

---

**Note.** It will be encrypted upon boot up of the server.

---

9. In *startConfigurator.sh* and *stopConfigurator.sh*, change *WLS\_PW=<old WebLogic password>* to *WLS\_PW=<new password>*.
10. Restart the Configurator server.

### Task 10-6-3: Uninstalling the PeopleSoft Enterprise Advanced Configurator Server

To un-install the PeopleSoft Enterprise Advanced Configurator server:

1. Stop the PeopleSoft Advanced Configurator Server.
2. Remove the *<bea home>/wlserver\_10.3/config/* directory.

---

## Task 10-7: Starting and Configuring the PeopleSoft Advanced Configurator Server on Solaris

### Understanding the PeopleSoft Advanced Configurator Server Initiation on Solaris

After you have installed WebLogic 10.3.1 and the Advanced Configurator Server, you need to start the Advanced Configurator Server. A startup script file, *startConfigurator.sh*, is provided.

You can call *startConfigurator.sh* in the following ways:

- Manually: Issue the *startConfigurator.sh* command on the command line.
- Automatically: Use the Solaris daemon to start this script file once the system is running.

When the *startConfigurator.sh* script file is called, it sets up all the necessary system environment variables for the WebLogic server, the JDK, and the Advanced Configurator Server.

The *startConfigurator.sh* script file performs the following tasks for you:

- Sets the appropriate system variables for the JDK.

- Sets the appropriate system variables for the Advanced Configurator Server
- Defines a Java classpath for WebLogic.
- Starts the PeopleSoft Enterprise Advanced Configurator Server.

## Task 10-7-1: Starting the Advanced Configurator Server from the Command Line

To start the PeopleSoft Enterprise Advanced Configurator server from the command line:

1. Log in as the WebLogic user.
2. Change directory to the location of the Advanced Configurator Server using this command:

```
cd /$HOME/bea/wlserver_10.3/config/CalicoDomain
```

3. Start the script file by using this command:

```
./startConfigurator.sh
```

The script starts the Advanced Configurator Server.

---

**Note.** To start and run the server in the background, use the command

```
nohup./startConfigurator.sh &
```

---

## Task 10-7-2: Stopping the Script File from the Command Line

To stop the startConfigurator script file from the command line:

1. Log in as the WebLogic user.
2. Change directory to the location of the Advanced Configurator Server using this command:

```
cd /$HOME/bea/wlserver_10.3/config/CalicoDomain
```

3. Start the script file with the command:

```
./stopConfigurator.sh
```

This stops the Advanced Configurator Server.

## Task 10-7-3: Starting the Advanced Configurator Server Automatically

To set up the Advanced Configurator Server to start automatically when the Solaris system starts:

1. Log in as root.
2. Create a file called Advanced Configurator\_ctl in /etc/init.d.

The file looks like this (with CONFIG\_HOME modified as needed for your system):

```
#!/sbin/sh
CONFIG_HOME=/ $HOME/bea/wlserver_10.3/config/CalicoDomain
case "$1" in
```



```

'start')
echo 'starting Advanced Configurator Server.'
su - weblogic -c "cd $CONFIG_HOME; ./startConfigurator.sh 1>/dev/null 2>&1" &
;;
'stop')
echo 'stopping Advanced Configurator Server.'
su - weblogic -c "cd $CONFIG_HOME; ./stopConfigurator.sh 1>/dev/null 2>&1" &
;;
*)
echo "Usage $0 { start | stop }"
;;
exit 0

```

3. Link the Advanced Configurator\_ctl file to the /etc/rc 3.d directory:

```

# ln Advanced Configurator_ctl /etc/rc3.d/K99configurator
# ln Advanced Configurator_ctl /etc/rc3.d/S99configurator

```

## Task 10-7-4: Resetting the Port

To change the server port:

1. Open the WebLogic Administration console for the Calico Domain:  
(<http://<hostname>:port-number/console>).
2. Select CalicoDomain, Servers, myserver
3. On the General tab, enter a new value for Listen Port.
4. Click the Apply button and restart the Advanced Configurator Server.

## Task 10-7-5: Setting the XML Encoding Option (Optional)

This step is optional.

Product configuration data created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set. You can specify different encoding by adding an encoding parameter in the solution using the WebLogic Console.

---

**Note.** You should use the default UTF-8 or change the encoding to specify Internet Assigned Numbers Authority (IANA) encoding name.

---

To change XML output encoding:

1. Open the file web.xml for editing. It is located at the following location:  
/ \$HOME/ bea/ wlserv\_ 10.3/ config/ CalicoDomain/ applications/ CalicoApp/ Web-inf
2. Locate these lines in the XML file:

```

<servlet>
  <servlet-name>copxml</servlet-name>
  <servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet
</servlet-class>

```

3. Create a new sub-element of the <servlet> element called <init-param>. Other sub-elements called <init-param> may already exist; do not modify them. Input the desired encoding in the param-value element; Shift-JIS is used here as an example:

```
<init-param>
  <param-name>encoding</param-name>
  <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the Advanced Configurator server.

---

## Task 10-8: Installing the PeopleSoft Visual Modeler

This section discusses:

- Understanding the PeopleSoft Visual Modeler
- Installing the Visual Modeler on Windows
- Uninstalling the PeopleSoft Visual Modeler

### Understanding the PeopleSoft Visual Modeler

The PeopleSoft® Visual Modeler™ is a hierarchical modeling tool for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.

The PeopleSoft Visual Modeler is designed for use in a Microsoft Windows environment.

To compile a model, the Visual Modeler needs access to an Advanced Configurator Server, which can be local or remote.

In addition, if model data is stored externally in a database, you can specify the connection in Visual Modeler. This section describes some of the information you need to gather before installing Visual Modeler.

For information on the hardware and software requirements for Visual Modeler, see the PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide

See *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements Guide*.

*Supported Databases:*

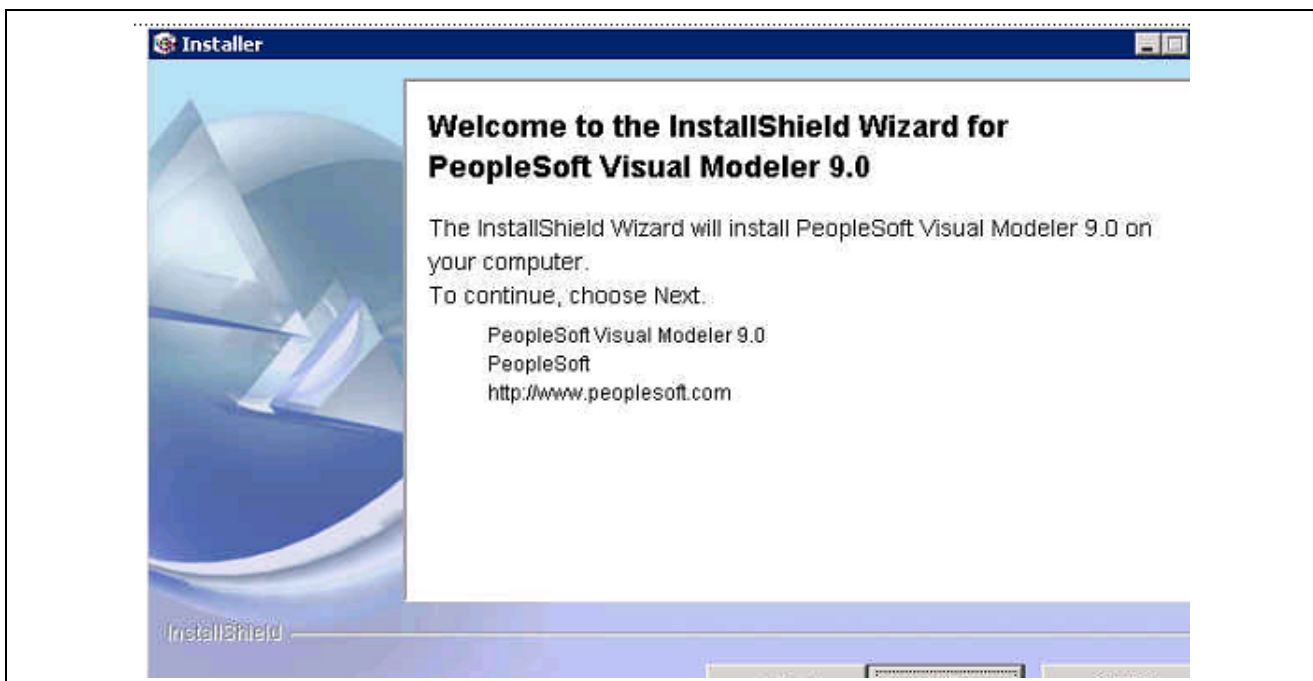
Use of the Visual Modeler does not require a database installed on your system. However, if you want to use external data within your models, the Visual Modeler supports the same databases as Advanced Configurator Server (see prerequisites).

### Task 10-8-1: Installing the Visual Modeler on Windows

To install the PeopleSoft Visual Modeler:

1. If WebLogic 10.3.1 or the Advanced Configurator Server is not yet installed on a server, do so now before proceeding.

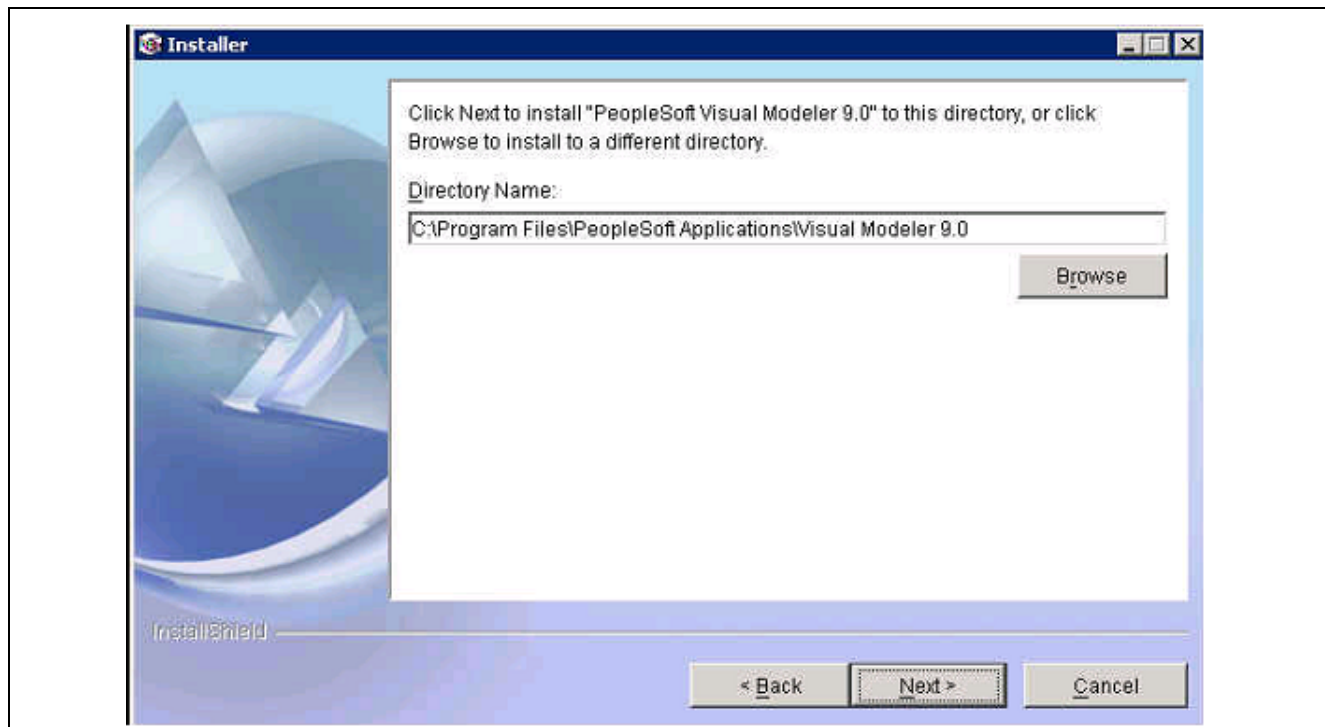
2. Log in as Windows Administrator or as a user with administrative privileges.
3. Insert the CRM 9 CD-ROM in the drive (of a Microsoft Windows machine).
4. Double-click setup.exe to launch the installation.
5. Click Next.  
The License Agreement dialog appears.
6. Accept the license agreement and click Next.  
The Select Database dialog appears.
7. Select the type of database that you will be using.
8. If you are prompted to select Unicode or non-Unicode; choose appropriately according to your database setup.  
The Server Selection dialog appears.
9. If you are installing only Advanced Configurator, select only PeopleSoft File Server. Otherwise, select PeopleSoft File Server and any other PeopleSoft servers you want to install. The Directory Selection dialog box appears.
10. Choose the directory in which to install the Visual Modeler installer. The Product Selection dialog box appears.
11. If you want to install only Advanced Configurator, clear the check boxes of all products except PeopleSoft Advanced Configurator. Otherwise, select PeopleSoft Advanced Configurator and any other products you want to install. The PeopleSoft Visual Modeler installer is copied to the directory you specified earlier.
12. Navigate to that directory and, within it, navigate to \$PS\_HOME/setup/Advanced Configurator/ViM.
13. Double-click VisualModeler\_setup.exe to launch the installation. The Welcome screen appears: .



Visual Modeler InstallShield Wizard dialog box

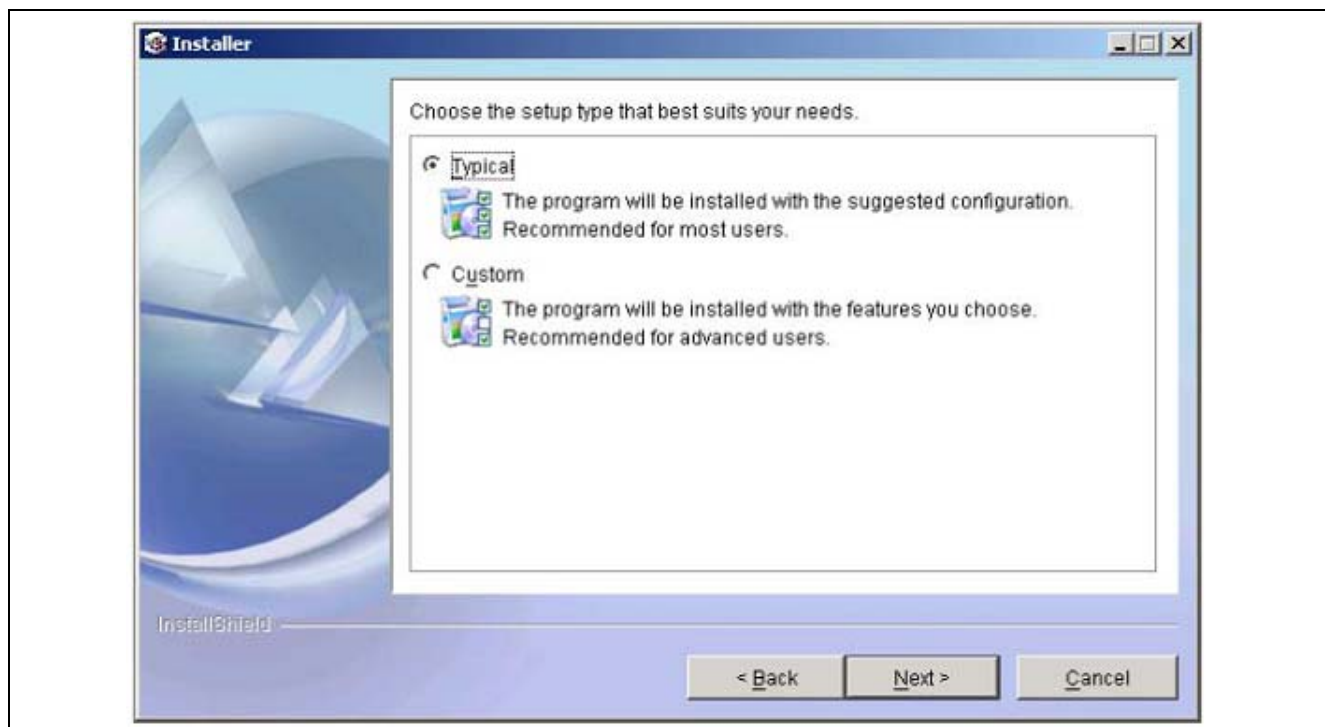
14. Click Next.  
The License agreement dialog appears.

By default, files are installed in C:\Program Files\PeopleSoft Applications\Visual Modeler 9.



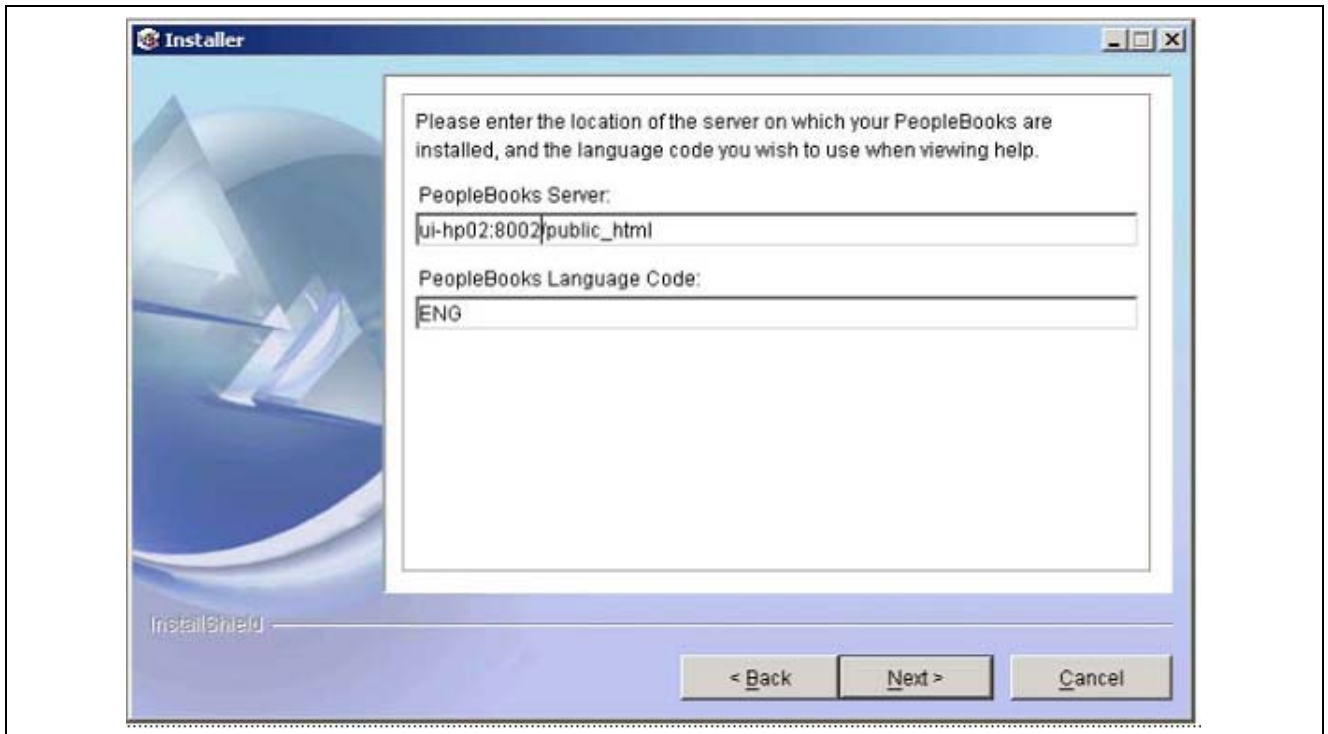
Visual Modeler Installer dialog box - Directory selection

15. Select Typical or Custom install:



Visual Modeler Installer dialog box - Setup type selection

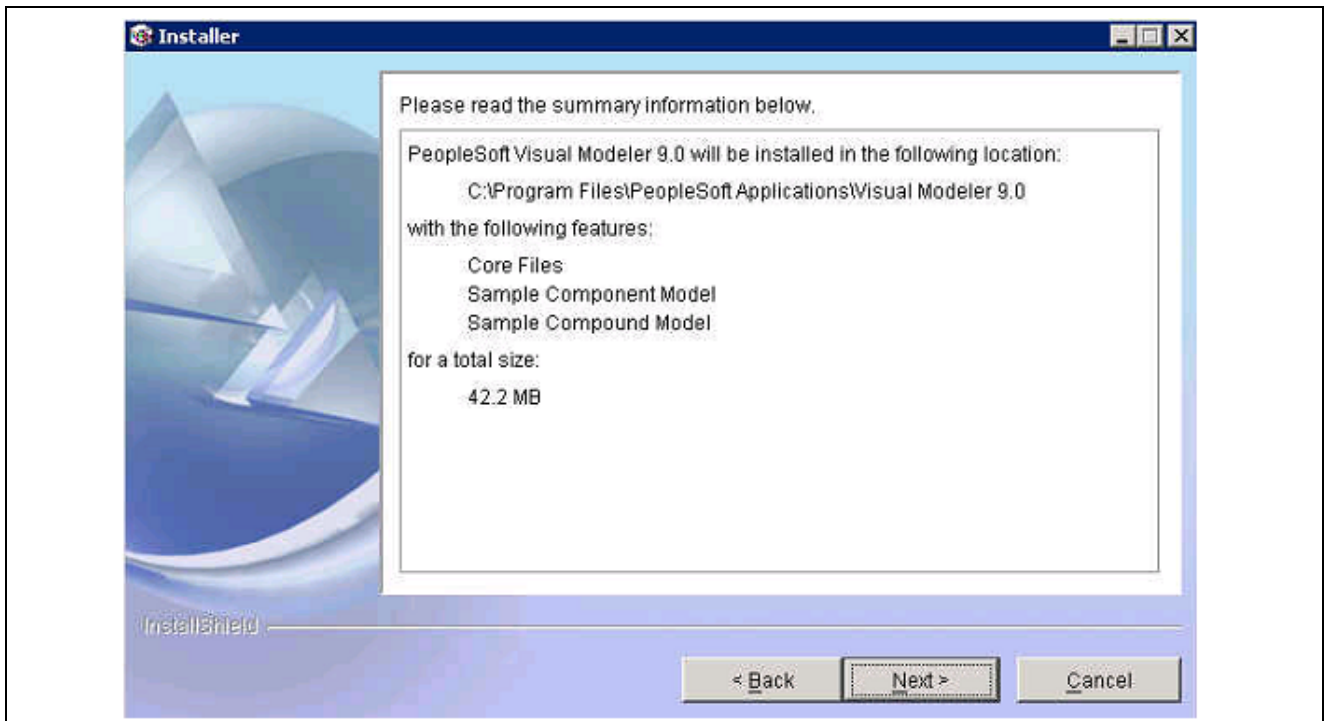
16. Enter the location of the server on which the PeopleSoft PeopleBooks are installed:



Visual Modeler Installer dialog box - specify PeopleBooks server

17. Click Next.

The Summary Information Dialog appears:



Visual Modeler Installer dialog box - Summary

18. Click Next to continue.

The Installation begins.

---

**Note.** You do not need to reboot the system when installation completes.

---

## **Task 10-8-2: Uninstalling the PeopleSoft Visual Modeler**

Use the Add/Remove Programs utility on the Control Panel to uninstall Visual Modeler. The uninstall program removes the Visual Modeler files from your system. Files generated while using the product remain intact.

---

## **Task 10-9: Installing for Integration to PeopleSoft Order Capture**

This section discusses:

- Understanding the Integration of PeopleSoft Advanced Configurator with PeopleSoft Order Capture
- Reviewing the Recommended Architecture for PeopleSoft Enterprise Advanced Configurator Integration with PeopleSoft Enterprise Order Capture
- Installing the PeopleSoft Advanced Configurator for Integration with Order Capture
- Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

### **Understanding the Integration of PeopleSoft Advanced Configurator with PeopleSoft Order Capture**

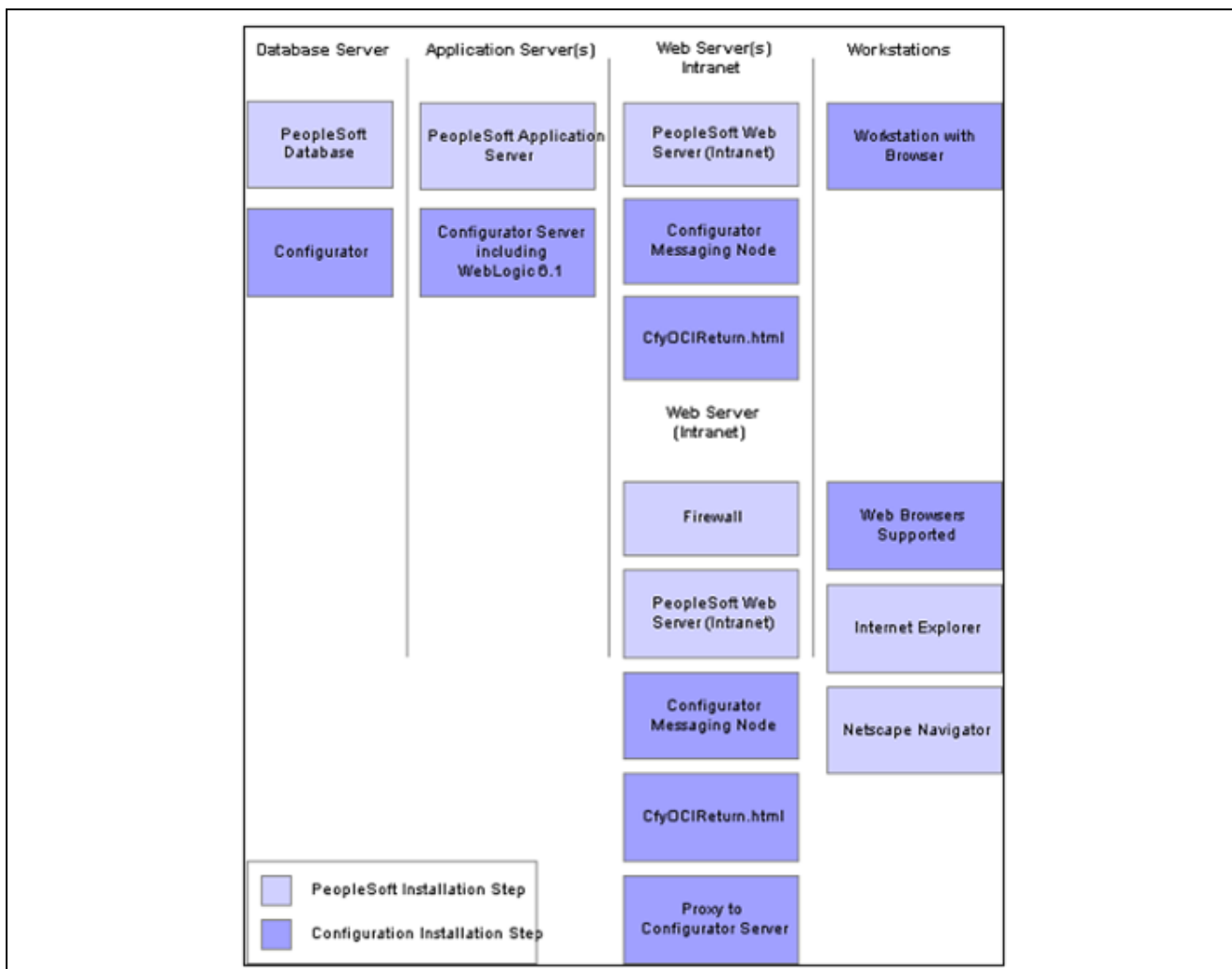
This section describes how to install and set up the components necessary to integrate the PeopleSoft Enterprise Advanced Configurator web application with PeopleSoft Enterprise Order Capture. Once setup is complete, a user creating an order can launch a configuration session from an order entry line, configure a product, and return to the Order Capture page with the updated product information.

The general steps necessary to integrate the PeopleSoft Enterprise Advanced Configurator web application with PeopleSoft Enterprise Order Capture are as follows:

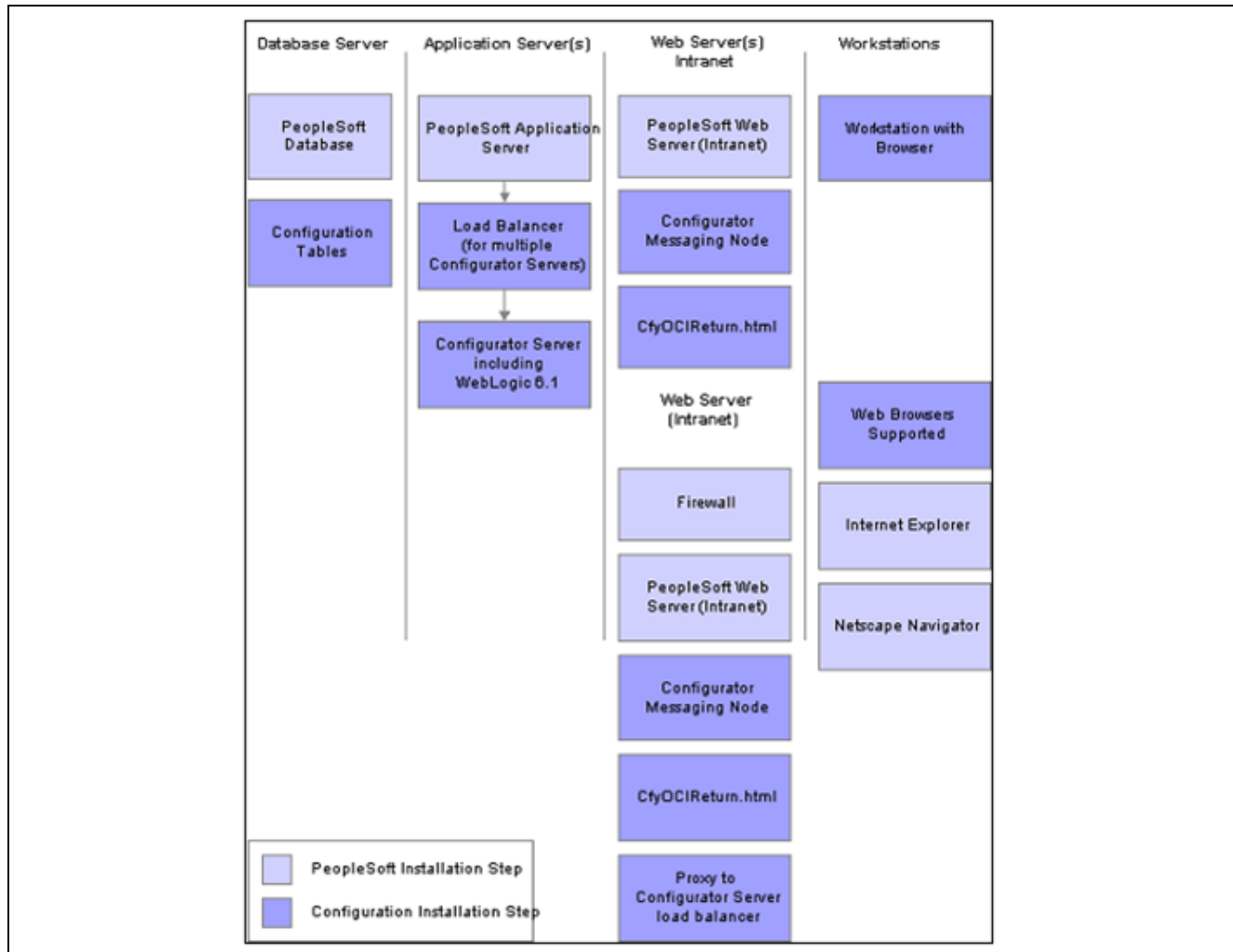
1. Install the WebLogic application server for Advanced Configurator.
2. Install the Advanced Configurator Server.
3. Set up the Advanced Configurator Server.
4. Set up proxy servers, if required.

### **Task 10-9-1: Reviewing the Recommended Architecture for PeopleSoft Enterprise Advanced Configurator Integration with PeopleSoft Enterprise Order Capture**

The following diagrams represent the recommended architecture:



Recommended architecture for low-volume environments



Recommended architecture for high-volume environments

## Task 10-9-2: Installing the PeopleSoft Advanced Configurator for Integration with Order Capture

To install PeopleSoft Advanced Configurator for integration with Order Capture:

1. . Install your PeopleSoft PeopleTools-based CRM system, including the WebServer, Appserver and Database.
2. Set up a working Integration Broker Server per the PeopleTools documentation..
3. . Install BEA WebLogic Server 10.3 (as above).

**Note.** You should install BEAWebLogic Server 10.3 for the Advanced Configurator Server in a separate BEA instance on your PeopleSoft web server (for example, c:\bea\_cfg instead of the default c:\bea) to ensure that the correct version of the BEA application server is used for your Advanced Configurator Server. For better performance, you can install the Advanced Configurator Server on a separate application server from your PeopleSoft PeopleTools-based web server. You can also use a load balancer to add additional Advanced Configurator Servers to the system.

4. Install the PeopleSoft Enterprise Advanced Configurator Server on your web server (as above).



---

**Note.** When running the PeopleSoft Enterprise Advanced Configurator installation, you must select the option to set up a database to contain configurations. Enter the database connectivity information for your CRM database.

---

5. If required, set up a proxy to the PeopleSoft Enterprise Advanced Configurator Server.
6. On your CRM system, navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.
7. Search for and select the “PSFT\_CFG” node.
8. Click the Connectors tab.
9. Edit the “PRIMARYURL” property and replace “<<configserver>>” with your server name (note that you delete the “<” and “>” also so that the resulting URL look like this: “http://uipd003.peoplesoft.com:7777/copxml”)

### Task 10-9-3: Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

For implementations that use a PeopleSoft Web Server outside a firewall, an additional installation step is required.

By default, the Advanced Configurator Server is set up to listen on port 7777. Most implementations will not open this port in the firewall, so any requests that contain 7777 in their URL (for example, http://ps\_config\_server\_ip:7777/copxml) will result in an error indicating that the page can't be found. The solution is to proxy (that is, redirect) certain requests from the PeopleSoft Web Server that is outside the firewall to the PeopleSoft Advanced Configurator Server inside the firewall. When the PeopleSoft Web Server receives a request with an URL known to the proxy setup, it will redirect the request to the PeopleSoft Advanced Configurator Server.

For example, a request of http://ps\_web\_server\_ip/copxml will be redirected to the PeopleSoft Advanced Configurator Server. The 7777 suffix is not included in the URL, so no issues with firewall permission are raised.

The following URLs require proxy setup in an installation of a PeopleSoft Web Server outside a firewall:

- http://ps\_config\_server\_ip:7777/copxml
- http://ps\_config\_server\_ip:7777/solutions/\*
- http://ps\_config\_server\_ip:7777/calico/\*
- http://ps\_config\_server\_ip:7777/solutionlist
- http://ps\_config\_server\_ip:7777/ConfigServerInfo/\*

#### *Example Proxy Setup for WebLogic Server*

Insert the following text into the web.xml file for the PeopleSoft Web Server (the default location is c:\bea\wlserver\_10.3\config\peoplesoft\applications\PORTAL\WEB-INF\web.xml):

```
<!-- Advanced Configurator Server Proxy Start --
<servlet>
<servlet-name>ProxyServlet</servlet-name>
<servlet-class>weblogic.t3.srvr.HttpProxyServlet</servlet-class>
<init-param>
<param-name>redirectURL</param-name>
<param-value>http://ps_config_server_ip:7777</param-value>
```

```

</init-param>
</servlet>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/solutions/*</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/calico/*</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/copxml</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/solutionlist</url-pattern>
</servlet-mapping>
<!-- Advanced Configurator Server Proxy End -->

```

---

**Note.** The following section maps a Solutions directory. All solutions should be installed under this directory:

```

<servlet-mapping>

<servlet-name>ProxyServlet</servlet-name>

<url-pattern>/solutions/*</url-pattern>>

</servlet-mapping>

```

---

## Task 10-10: Installing Multiple Configurator Instances on Microsoft Windows (Optional)

This section discusses:

- Using Multiple WebLogic Installs
- Using a Single WebLogic Install

The Configurator 9 installer for Windows only allows one instance to be installed per machine. However, multiple instances may be created by executing a few manual steps. You can install multiple instances in two ways: using multiple WebLogic installs and using a single WebLogic install. In both cases, the basic procedure is to run the installer to create the first installation and then copy the %BEA\_HOME%\wlserver\_10.3\config\CalicoDomain directory.

### Task 10-10-1: Using Multiple WebLogic Installs

To install multiple Configurator Instances on Windows using multiple WebLogic installs:

1. Run the WebLogic installer again. Be sure to select the option to create a new BEA home.

2. Copy the CalicoDomain directory to the new BEA home (BEA\_HOME\_2). `xcopy %BEA_HOME_1%\wlserver_10.3\config\CalicoDomain %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain /E /I`
3. Edit `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\startConfigurator.cmd` and `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\stopConfigurator.cmd`. Change BEA\_HOME and WL\_HOME to reflect the new location.
4. Edit `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\install\propupdate.cmd` and change all occurrences of the BEA\_HOME\_1 directory to BEA\_HOME\_2. If you do not need to run both instances at the same time, you can stop here. Otherwise, continue with steps 5 through 7 to change the listen port. The example steps show changing the port to 7001, but you can use any port number you choose..
5. Edit `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\config.xml`. Change `ListenPort="7777"` to `ListenPort="7001"`.
6. Edit `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\stopConfigurator.cmd`. Change `-url localhost:7777` to `-url localhost:7001`.
7. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain2\applications\CalicoApp\WEB-INF\config\LEDBAcc.properties`. Change all occurrences of 7777 to 7001. If you also need to run both instances as services at the same time, then continue to step 8 to change the service name. In the example, the name is changed to Configurator Instance 2, but you can choose any name that does not conflict with an existing service.
8. Edit `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\startConfigurator.cmd` Change `set SERVICE_NAME=PeopleSoft Configurator Server` to `set SERVICE_NAME=Configurator Instance`.

## Task 10-10-2: Using a Single WebLogic Install

Creating multiple Configurator instances within the same WebLogic installation is similar to the process with multiple WebLogic installations. The key difference is that each instance must have a unique domain name.

To install multiple Configurator Instances on Windows using multiple WebLogic installs:

1. Copy the CalicoDomain directory. The target directory name will be the name of the new domain: `xcopy %BEA_HOME%\wlserver_10.3\config\CalicoDomain %BEA_HOME%\wlserver_10.3\config\CalicoDomain2 /E /I`. Steps 2 through 5 will complete the domain name change for the new instance.
2. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain\config.xml` and change all occurrences of CalicoDomain to CalicoDomain2.
3. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain\startConfigurator.cmd` and change all occurrences of CalicoDomain to CalicoDomain2.
4. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain\stopConfigurator.cmd` and change all occurrences of CalicoDomain to CalicoDomain2.
5. Edit `%BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\install\propupdate.cmd` and change all occurrences of CalicoDomain to CalicoDomain2. If you do not need to run both instances at the same time, you can stop here. Otherwise, continue with steps 6 through 8 to change the listen port. The example steps show changing the port to 7001, but you can use any port number you choose.
6. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain2\config.xml`. Change `ListenPort="7777"` to `ListenPort="7001"`.
7. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain2\stopConfigurator.cmd`. Change `-url localhost:7777` to `-url localhost:7001`.
8. Edit `%BEA_HOME%\wlserver_10.3\config\CalicoDomain2\applications\CalicoApp\WEB-INF\config\LEDBAcc.properties`. Change all occurrences of 7777 to 7001. If you also need to run both instances

as services at the same time, then continue to step 9 to change the service name. In the example, the name is changed to Configurator Instance 2, but you can choose any name that does not conflict with an existing service.

9. Edit %BEA\_HOME%\wlserver\_10.3\config\CalicoDomain2\startConfigurator.cmd and change set SERVICE\_NAME=PeopleSoft Configurator Server to set SERVICE\_NAME=Configurator Instance 2.

# CHAPTER 11

## Installing PeopleSoft Infosync 9

This chapter discusses:

- Understanding the PeopleSoft Infosync 9 Installation
- Prerequisites
- Installing the PeopleSoft Enterprise CRM InfoSync Server and Client 9
- Preparing for Installation
- Preparing the PeopleSoft Infosync Server for Lotus Domino
- Preparing the PeopleSoft Infosync Server for Microsoft Exchange
- Setting Up the PeopleSoft Integration Broker
- Installing the PeopleSoft Infosync Server
- Setting Up PeopleSoft CRM Access
- Exporting Users from PeopleSoft CRM to the PeopleSoft Infosync Server
- Importing Users into the PeopleSoft Infosync Server
- Preparing for the PeopleSoft Infosync Client Installation
- Installing the PeopleSoft Infosync Client
- Running the PeopleSoft Infosync Client

---

### Understanding the PeopleSoft Infosync 9 Installation

This chapter provides instructions for installing and configuring Oracle's PeopleSoft Enterprise Infosync 9.

---

**Note.** Consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

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**Note.** Check Oracle's PeopleSoft Customer Connection for updates and fixes that are required at installation, before you proceed with your installation.

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### Prerequisites

PeopleSoft Infosync 9 supports these application databases:

- PeopleSoft CRM 8.4 SP1
- PeopleSoft CRM 8.8 SP1
- PeopleSoft CRM 8.9 SP1
- PeopleSoft CRM 9.0

---

## Task 11-1: Installing the PeopleSoft Enterprise CRM InfoSync Server and Client 9

To install the PeopleSoft Infosync Server and PeopleSoft Infosync Client 9

1. Unzip the media content and locate setup.exe in the disk1 directory.
2. Double-click setup.exe and select the desired installation options for the PeopleSoft InfoSync Server and Client 9
3. A setup directory will be created containing InfosyncClient and InfosyncServer subdirectories in your install location.

---

## Task 11-2: Preparing for Installation

### Understanding Knowledge and Skill Requirements

To install the PeopleSoft Infosync Server, you must possess the following skills and knowledge:

- An understanding of Microsoft Windows administration.
- An understanding of groupware administration for the groupware platform that you want to synchronize through the PeopleSoft Infosync Server.

---

**Note.** The names Infosync and Intellisync are synonymous and may be used interchangeably throughout the installation.

---

### Task 11-2-1: Understanding Supported Languages

The PeopleSoft Infosync Server is available in English, German, Japanese, French, and Spanish. In this release, PeopleSoft Infosync Server components and the applications to which they connect, such as groupware, must all use the same language. The admin console is available only in English and Japanese.

### Task 11-2-2: Reviewing Supported Systems

Oracle supports and tests the PeopleSoft Infosync Server with the following groupware applications:

- Lotus Domino 5.0 Server with the Lotus Notes 5.0 client.
- Lotus Domino 6.0 Server with the Lotus Notes 6.0 client.
- Lotus Domino 6.5 Server with the Lotus Notes 6.5 client.

- Microsoft Exchange Server 2000 with Microsoft Outlook 2000.
- Microsoft Exchange Server 2003 with Microsoft Outlook 2003.

See *PeopleSoft Enterprise CRM 9 Hardware and Software Guide*, “Defining PeopleSoft Infosync Server Requirements.”

---

**Note.** Multiple groupware servers can be synchronized, but all groupware servers must be the same version, such as Microsoft Exchange Server 2000. Also, note that for the machine that contains the PeopleSoft Infosync Server, specific versions of certain DLLs are necessary for Microsoft Outlook and Lotus Notes. This requirement applies only to the machines that contain the PeopleSoft Infosync Server and does not affect the rest of your organization. See the documentation *EAINstall\_Domino.doc* and *EAINstall\_Exchange.doc* install guides for details.

---

---

## Task 11-3: Preparing the PeopleSoft Infosync Server for Lotus Domino

Review the document *EAINstall\_Domino.doc* if you are installing PeopleSoft Infosync with a Lotus Domino server. This file can be found in the `setup\InfosyncServer` directory in your install location. This document details the steps that you must perform before you install PeopleSoft Infosync Server for Lotus Domino.

---

## Task 11-4: Preparing the PeopleSoft Infosync Server for Microsoft Exchange

Review the document *EAINstall\_Exchange.doc* if you are installing PeopleSoft Infosync with a Microsoft Exchange server. This file can be found in the `setup\InfosyncServer` directory in your install location. This document details the steps that you must perform before you install PeopleSoft Infosync Server for Microsoft Exchange.

---

## Task 11-5: Setting Up the PeopleSoft Integration Broker

A complete PeopleSoft Integration Broker setup is required as part of the PeopleSoft Infosync Server product to perform data synchronization between PeopleSoft CRM and Personal Information Management (PIM) servers. The setup delivers the PeopleSoft Integration Broker objects that are used in this integration. The information that you set up in the PeopleSoft Integration Broker is needed to set up the URI specified in the PeopleSoft Infosync installation:

- Two nodes: PSFT\_INFOSYNC and PSFT\_PIM
- One transaction message: PIM\_CONTACT\_SYNC
- Two code sets for data translation: INFOSYNC TO PIM and PIM TO INFOSYNC

To set up PeopleSoft Infosync with the PeopleSoft Integration Broker:

---

**Note.** Oracle recommends that you perform the following tasks before using PeopleSoft Integration Broker.

---

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and change the default password used in the external node (that is, PSFT\_PIM).

After you perform the password change on the Node Definitions page, click Save.

2. Modify the integrationGateway.properties file under:

`c:\<ps_home>\webserver\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF`

- If the integration gateway supports only one database, set up the integrationGateway.properties file with the default application server.

For example:

```
ig.isc.serverURL=//<yourappserver:jsl_port>
ig.isc.userid=VP1
ig.isc.password=Ez6NDsqOkxI=
ig.isc.toolsRel=8.48
```

Your values may vary from the previous example.

- If the integration gateway supports more than one database and you cannot set up the default application server to point to the correct database, set up a node as follows:

```
ig.isc.<default local node in PIM database>.serverURL=//<yourappserver:jsl_
port>
ig.isc.<default local node in PIM database>.userid=VP1
ig.isc.<default local node in PIM database>.password=Ez6NDsqOkxI=
ig.isc.<default local node in PIM database>.toolsRel=8.48
```

In every database there is only one default local node. The Default Local Node check box is selected for this node.

Your values may vary from the previous example.

---

**Note.** In both cases, ensure that the toolsRel value matches the version of your PeopleSoft PeopleTools release, including patch level. For example: 8.48.01.

---

3. If you change the PeopleSoft Integration Broker user ID and password, ensure that the new user ID and password are updated in the integrationGateway.properties file.

For the password, enter the encrypted form. PeopleSoft provides a utility that returns an encrypted version for the password that you provide. This utility is called pscipher.bat and is located in the `c:\<PS_HOME>\webserver\peoplesoft` directory. Run the pscipher.bat utility from the command prompt as follows:

```
c:\pt848\webserver\peoplesoft>pscipher <your_password>
```

4. Select PeopleTools, Integration Broker, Configuration, Gateways, to access the Gateways page.
5. Click Search for the local Gateways page and verify that the gateway URL is updated with the web server name on which the PeopleSoft Integration Broker resides.
6. If the URL field is blank, do the following:
  - a. Enter the Gateway URL in the Gateway URL field.

For example:



*http://<webserver name>:<port number>/PSIGW/PeopleSoftListeningConnector*

b. Click the Load Gateway Connectors button to populate the connector information, and then click Save.

7. Update the Integration Broker parameter.

You must update the Integration Broker-related variable in the PeopleSoft application server configuration file (psappsrv.cfg). Specifically, you must update the value of the Min Message Size for Compression variable to 1000000, if it is not higher than 1000000, as illustrated:

```
----- [Integration Broker]
;=====
; General settings for the Integration Broker ;=====
===== ; Minimum size of message data for
synchronous handler to enable compression. Min Message Size For Compression=1000000
----- This value denotes that PeopleSoft
Integration Broker will compress outgoing messages when the message size exceeds this set value.
```

For PeopleSoft Sales for Blackberry to work correctly, outgoing PeopleSoft Integration Broker messages should never be in a compressed state. PeopleSoft Integration Broker logs display whether a message is pushed out in a compressed state or not.

---

**Note.** Do not log on to the PeopleSoft Infosync Server and perform synchronization using the same user ID that PeopleSoft Integration Broker uses, as specified in the integrationGateway.properties file.

---

## Task 11-6: Installing the PeopleSoft Infosync Server

To install the PeopleSoft Infosync Server:

1. Double-click setup.exe from the setup\InfosyncServer directory in your install location
2. Follow the directions in the Intellisync Mobile Suite install guide, InstallGdeEN.pdf that is located in the setup\InfosyncServer directory. You do not need to install the InfoSync Client at this time.
3. During install you are prompted for a license key. Enter: *034B4A42CBB4B5B4B5B4B54B4A43480BB9*

## Task 11-7: Setting Up PeopleSoft CRM Access

This section discusses:

- Adding the XML Connector
- Modifying the XML Connector Settings in the Admin Console
- Enabling Signon PeopleCode
- Activating Service Operation
- Activating Queues
- Creating Users for Accessing PeopleSoft CRM from the PeopleSoft Infosync Server
- Defining PIM Install Options
- Defining PIM Preferences

## Task 11-7-1: Adding the XML Connector

To add the XML node:

1. Review the document XMLConnector.pdf and follow the steps as outlined to install XML Connector. This document is found in the setup\InfosyncServer\Documentation\English directory.

In the remainder of this document it is assumed that you named this node PeopleSoft and created a setting underneath the node as *Default*.

2. When prompted for an XML Connector ID, enter 100. For the Name: PeopleSoft

## Task 11-7-2: Modifying the XML Connector Settings in the Admin Console

To modify the XML connector settings:

1. Select Start, Programs, Intellisync Mobile Suite, Admin Console to access the administration functions.
2. Expand the following:
  - a. The Intellisync Mobile Suite node.
  - b. The Profile Settings node.
  - c. The Wireless Email node.
3. Expand the PeopleSoft node, and select the Default node (or the one that you installed), and then right-click and select Properties.

The Default Properties page appears.

Default Properties: Settings page

Enter the following:

- In the Server URL field, enter the web server name where your PeopleSoft Integration Broker is running.
- In the Server Port field, enter the port number of the web server.
- In the Server URI field, the string is determined by the integrationGateway.properties file. Specify the string for the Server URI field as follows:

If your integrationGateway.properties file has a default application server defined, enter the following in the Server URI field:

*/PSIGW/HttpListeningConnector?From=PSFT\_PIM&MessageName=PIM\_CONTACT\_SYNC&MessageType=sync&Password=infosync*

If your integrationGateway.properties file does *not* have a default application server defined, and specifies a NODENAME, enter the following in the Server URI field:

```
/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=  
<defaultLocalNode>&MessageNamePIM_CONTACT_SYNC&MessgaeType=  
sync&Password=infosync
```

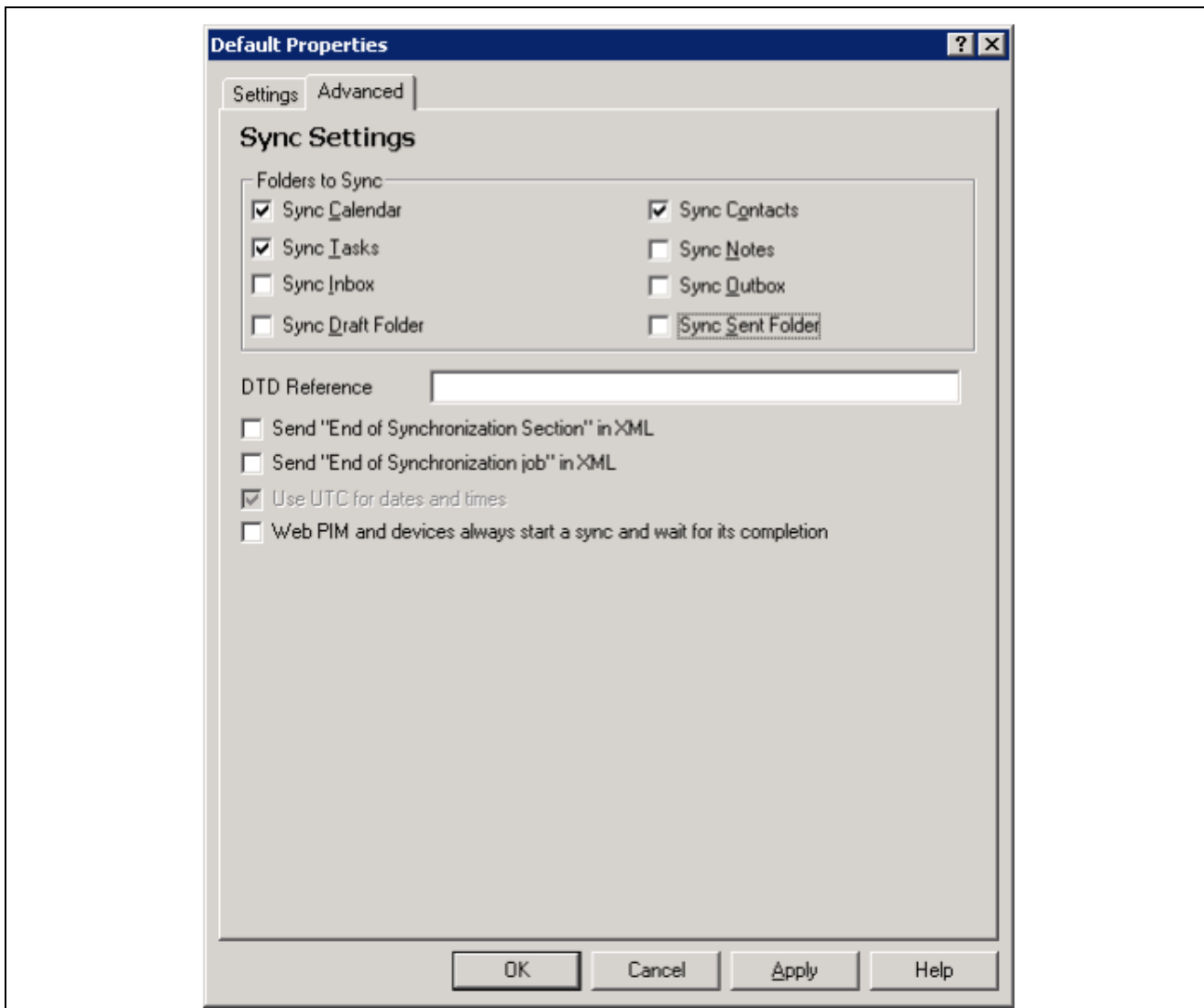
- d. The <defaultLocalNode> should be replaced with the node defined as your default local node on your database and defined as the NODENAME pointing to the correct application server in the integrationGateway.properties file.
  - e. If the default password that is used in the external node (PSFT\_PIM) is changed, as recommended in the task *Setting Up the PeopleSoft Integration Broker*, then you must also make the changes in the Server URI string. Replace the default password *infosync* with the new password.
4. Click Apply to save your changes.

---

**Note.** Test the Check Server Connection after completing the Defining PIM Preferences section later in this task.

---

5. Select the Advanced tab and verify that the Folders to Sync in the Sync Settings match the check boxes selected in the following example. The Sync Calendar, Sync Tasks, and Sync Contacts should be the only boxes selected.



Default Properties: Advanced page

### Task 11-7-3: Enabling Signon PeopleCode

To enable Signon PeopleCode for the PeopleSoft Infosync Server integration:

1. Select PeopleTools, Security, Security Objects, Signon PeopleCode, to enable the Signon PeopleCode program on the Signon PeopleCode page.
2. Select the Invoke as user signing in option.
3. Add a new row for the PIM Signon PeopleCode program if it does not already exist. Click the + button to add a new row.
4. Specify the following values for the new row:
  - Enter a sequence number.
  - Select the Enabled check box for this row.
  - Enter *FUNCLIB\_PIM* as the record.
  - Enter *PWDCNTL* as the field name.

- Enter *FieldDefault* as the event name.
  - Enter *PIM\_Authentication* as the function name.
  - Select the Exec Auth Fail check box.
5. Click Save to save the page.
  6. Sign out of your database. Delete the application server cache, and then restart the application server.

### See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, "Employing Signon PeopleCode and User Exits."

## Task 11-7-4: Activating Service Operation

To activate a service operation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. In the Service Operation name field, enter *PIM\_CONTACT\_SYNC* and click the Search button.
3. Open the details screen for *PIM\_CONTACT\_SYNC* service operation and select the Active check box.
4. On the Handlers tab, select *Active* from the Status drop-down list box for REQUESTHDLR handler.
5. Click the Save button to save your changes.
6. On the Routings tab, select all of the check boxes in the Selected column, and then click the Activate Selected Routings button.
7. Click the Save button to save your changes.

## Task 11-7-5: Activating Queues

This step activates queues.

1. Select PeopleTools, Integration Broker, Integration Setup, Queues
2. In the Queue Name field, enter *PIM\_CONTACT\_SYNC* and click the Search button
3. Click the hyperlink for *PIM\_CONTACT\_SYNC*
4. Set the Queue Status: Run
5. Click Save.

## Task 11-7-6: Creating Users for Accessing PeopleSoft CRM from the PeopleSoft Infosync Server

This task creates the transient user ID that is used in the next section.

See "Defining the PIM Transient User."

To create user IDs that are referenced in the PIM System Data page:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. Select an existing user or click Add a New Value to enter a new User ID.
3. On the General page, select a symbolic ID and password.

4. Select the ID tab, and set the ID type to *None*.
5. Click Save.

## Task 11-7-7: Defining PIM Install Options

### Defining the PIM Transient User

To define the PIM transient user:

1. Select Set Up CRM, Product Related, Infosync, Install Options to access the PIM System Data page.
2. Define the following user IDs:
  - PIM Transient User ID: Enter a user ID that serves as a transient user.  
This user was created in the previous section.
  - PIM Transient User Password: Enter the password of the transient user.

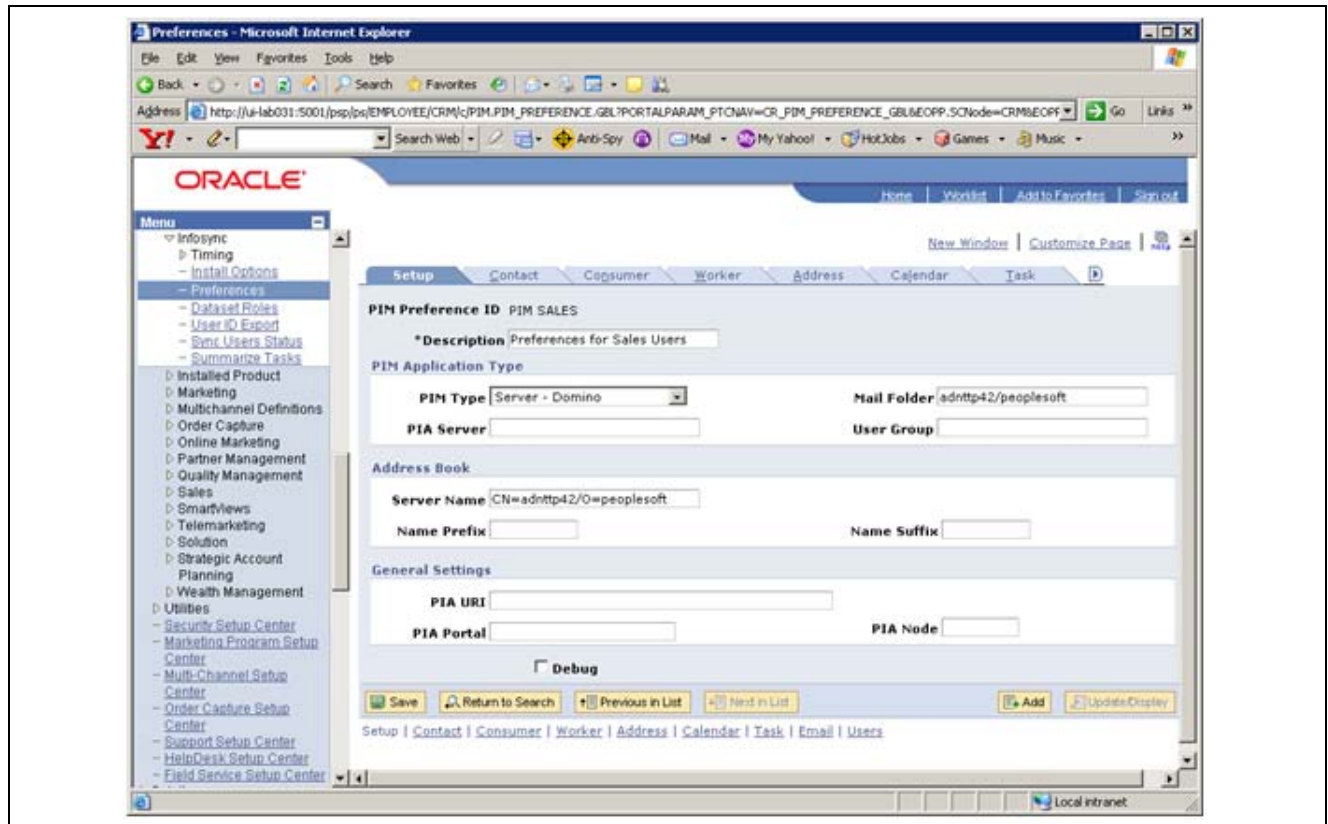
The PIM transient user must be different than the PeopleSoft Integration Broker User ID (specified in User ID Sign On in the PeopleSoft Integration Broker gateway.properties file)

## Task 11-7-8: Defining PIM Preferences

A PIM preference ID must be assigned to a user before they can synchronize their data.

To set a user's PIM preference ID in PeopleSoft CRM:

1. Log in to the PeopleSoft CRM database using PeopleSoft Pure Internet Architecture.
2. Select Set Up CRM, Security, User Preferences.
3. Search for the user ID and select the PIM preference ID for the user.
4. Click Save.
5. Select Set Up CRM, Product Related, Infosync, Preferences to access the PIM Preferences page.
6. Search for the PIM preference ID that is assigned to the user.
7. On the Setup page, select the PIM Type for your mail application (Microsoft Exchange or Lotus Domino).



PIM Preferences - Setup Page

- If *Exchange* is selected, enter the Mail Domain Name
- If *Domino* is selected, enter the Mail Folder and Address Book Server Name.

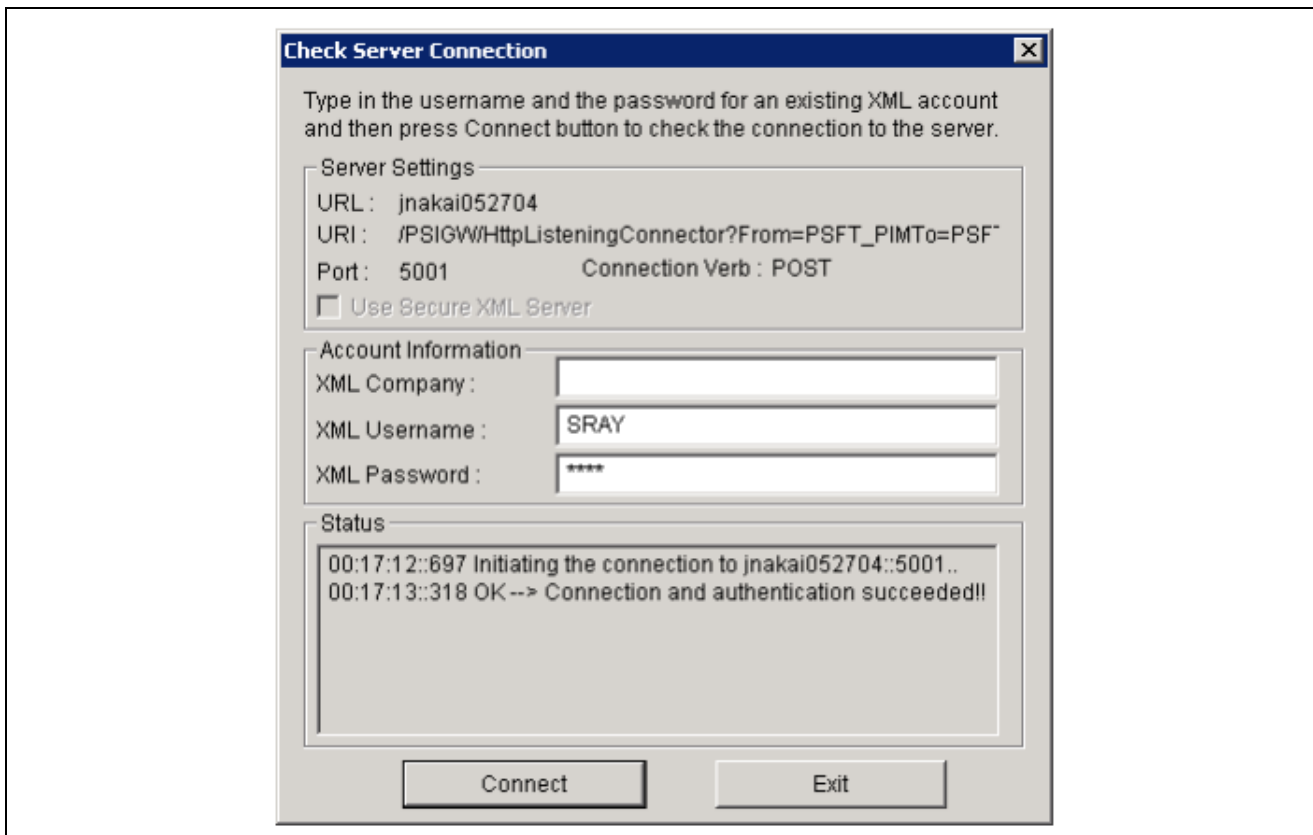
8. Click Save.

The following steps test the connection to the XML Connector.

9. Select Start, Programs, Intellisync Mobile Suite, Admin Console to access the administration functions.
10. Expand the Intellisync Mobile Suite node if it is not expanded.
11. Expand the Profile Settings node, and then expand the Wireless Email node.
12. Expand the PeopleSoft node (or the one that you installed) and select the Default node, right-click and select Properties.
13. Click the Check Server Connection button and enter the user ID in the XML Username field and password in the XML Password field for any of the users that you associated with a PIM preference ID in step 3 of this section.
14. Click the Connect button.

A status box displays a result of OK.





Check Server Connection dialog box

---

## Task 11-8: Exporting Users from PeopleSoft CRM to the PeopleSoft Infosync Server

This section discusses:

- Understanding User Export from PeopleSoft CRM to PeopleSoft Infosync
- Running Through the PeopleSoft Pure Internet Architecture
- Running Through the DOS Prompt

### Understanding User Export from PeopleSoft CRM to PeopleSoft Infosync

PeopleSoft CRM delivers an application engine (AE) process (PIM\_ID\_SYNC) that exports PIM user IDs from the PeopleSoft CRM system to a text file. The file is used by a utility to import users to the PeopleSoft Infosync Server. You can run this AE process in the following two ways:

- Through PeopleSoft Pure Internet Architecture (PIA).
- Through the DOS prompt.

## Task 11-8-1: Running Through the PeopleSoft Pure Internet Architecture

To run the AE process through the PeopleSoft Pure Internet Architecture (PIA):

---

**Note.** Ensure that the PeopleSoft Process Scheduler is up and running before making any AE process requests on the PeopleSoft Pure Internet Architecture.

---

1. Select Set Up CRM, Product Related, Infosync, User ID Export to access the PIM ID Export page.

You can use an existing run control to execute the AE process, or add a new run control.

2. Click Run.

The Process Scheduler Request page appears.

3. Ensure that *PIM\_ID\_SYNC* is selected in the Process List group box, and then click OK.

4. On the PIM ID Export page, click the Process Monitor link to check the status of the AE process.

Click Refresh until the Run Status field returns *Success*.

5. Click the Details link.

The Process Detail page appears.

6. Click the View Log/Trace link.

File count depends on whether you have PIM Preferences for both Lotus Domino and Microsoft Exchange, or just one. They are as follows:

- *.stdout*: Contains the DOS prompt output.
- *Infosync\_Domino\_ID\_Import\_<date/time>.txt*: The user import text file that the Bulk User Import utility needs to import users to the PeopleSoft Infosync Server. This file is specific to the Lotus Domino Server. This file does not appear if no users were associated with PIM preferences for Lotus Domino.
- *Infosync\_Exchange\_ID\_Import\_<date/time>.txt*: The user import text file that the Bulk User Import utility needs to import users to PeopleSoft Server. This file is specific to Microsoft Exchange Server. This file does not appear if no users were associated with PIM preferences for Microsoft Exchange.
- *Infosync\_ID\_Import\_Log.txt*: The log file for the AE process. Here's the format of the log file:  
 <Date/time stamp>:<Message indicator>:<Actual message>  
 where <Message indicator> can be I (information), W (warning), and E (error).

7. If your distribution node has not been set up on your process scheduler, the View Log/Trace link may not be active.

Check for the *Infosync\_Domino\_ID\_Import\_<date/time>.txt*, *Infosync\_Exchange\_ID\_Import\_<date/time>.txt*, and *Infosync\_ID\_Import\_Log.txt* files under *c:\<ps\_home>\appserv\<dbname>\prcs\<dbname>\files* directory.

## Task 11-8-2: Running Through the DOS Prompt

To run the AE program through the DOS prompt:

1. Open a DOS prompt.

Change the directory to *c:\<ps\_home>\bin\Client\winx86*

2. Enter the following command:

```
PSAE -CT <Database Type> -CD <Database Name> -CO <User ID> -CP <Password> -R
PIM_ID_SYNC -AI PIM_ID_SYNC
```

where <Database Type> is the platform of the PeopleSoft CRM database.

For example, enter MICROSOFT for a Microsoft SQL Server database, or ORACLE for an Oracle database. <Database Name> specifies the database name of the PeopleSoft CRM database. <User ID> and <Password> are the login information of the user in the PeopleSoft CRM database who requests the AE process.

3. Press ENTER.
4. File count depends on whether you have PIM preferences for both Lotus Domino and Microsoft Exchange, or just one.

Files are: Infosync\_Domino\_ID\_Import\_<date/time>.txt, Infosync\_Exchange\_ID\_Import\_<date/time>.txt, and Infosync\_Import\_Log.txt.

---

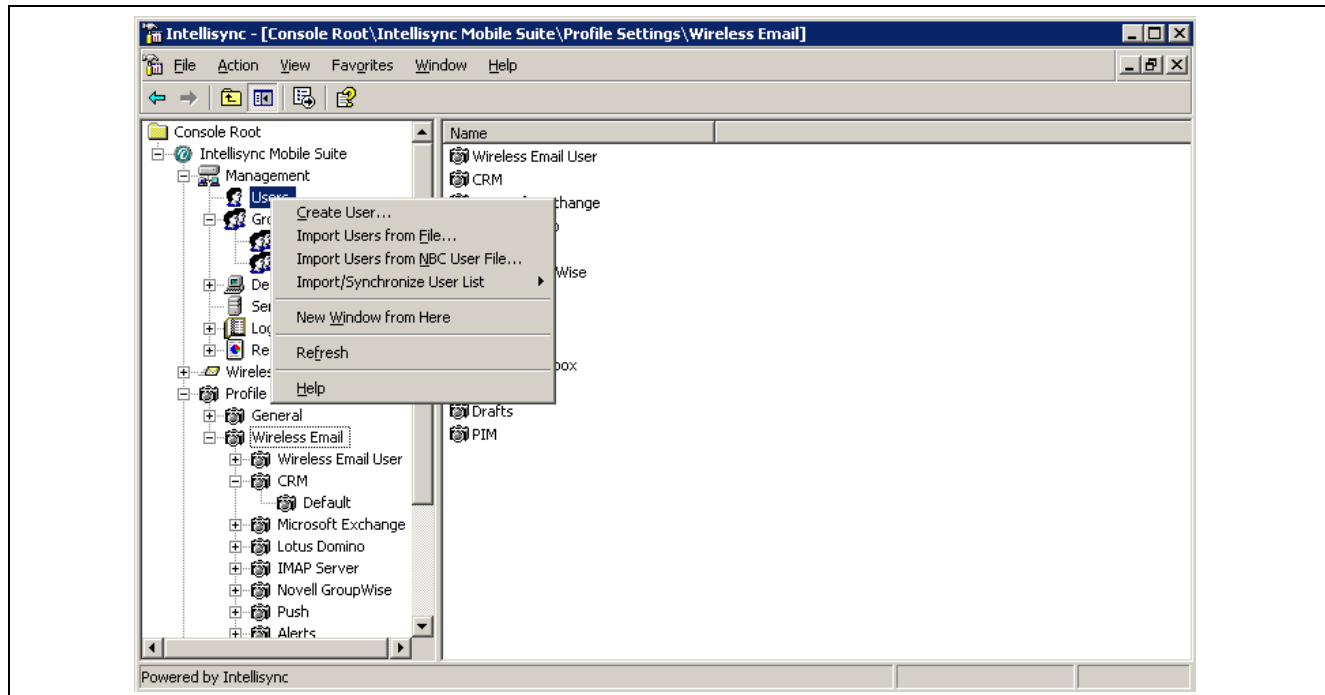
**Note.** Infosync\_Domino\_ID\_Import\_<date/time>.txt file does not appear if there are no users associated with PIM preferences for Lotus Domino, and Infosync\_Exchange\_ID\_Import\_<date/time>.txt does not appear if there are no users associated with PIM preferences for Microsoft Exchange.

---

## Task 11-9: Importing Users into the PeopleSoft Infosync Server

To import users into the PeopleSoft Infosync Server:

1. Select Start, Programs, Intellisync Mobile Suite, Admin Console on the Windows workstation where the PeopleSoft Infosync Server resides.
2. Expand the Intellisync Mobile Suite node.  
Expand the Management node.
3. Right-click the Users node.  
Select Import Users from File.



Intellisync Admin Console

4. A file select dialog box opens.  
Select the file that you want to import.
5. After the import process completes, review the admin console Users node to confirm that the users have been created for everyone in the file.

## Task 11-10: Preparing for the PeopleSoft Infosync Client Installation

Verify that the following tasks have been completed. These tasks are prerequisites for setting up the install workstation:

- The PeopleSoft Infosync Client is supported on the Windows NT, 2000, 2003, XP, and Vista platforms.
- You must have administrative access to install software on the workstation.  
The software install writes files to directories and updates registry settings.
- Verify that the PeopleSoft Integration Broker gateway is running on your PeopleSoft CRM database.
- Verify that during the setup of the PeopleSoft Integration Broker, the Gateway URL points to the PeopleSoftListening Connector (that is, <http://<webserver>/PSIGW/PeopleSoftListeningConnector>).
- Verify that the IntegrationGateway.properties file has been updated.

See “Setting Up the PeopleSoft Integration Broker.”

## Task 11-11: Installing the PeopleSoft Infosync Client

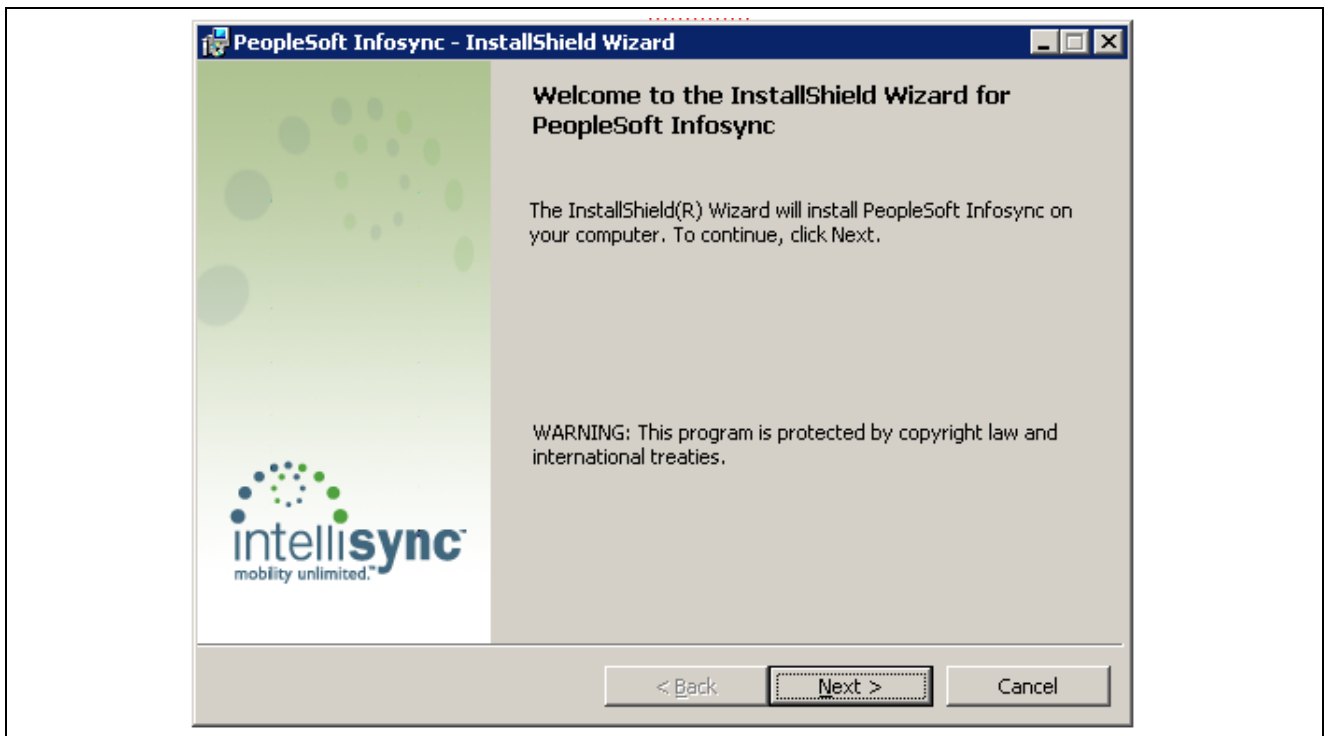
The PeopleSoft Infosync Client does not require installation on a workstation that has PeopleSoft PeopleTools installed; however, doing so causes no harm.

In the task “Installing the PeopleSoft Enterprise CRM Infosync Server and Client 9,” a setup\InfosyncClient directory installs that contains an *IntellisyncForPeopleSoft.exe* file. Unzipping this self-extracting file installs a DISK1 directory.

Perform the following PeopleSoft Infosync Client installation and configuration steps using the PeopleSoft Infosync InstallShield Wizard to guide you through an easy installation process. You can send this file out to your end-users for installation on their workstations; however, each end-user must configure the software.

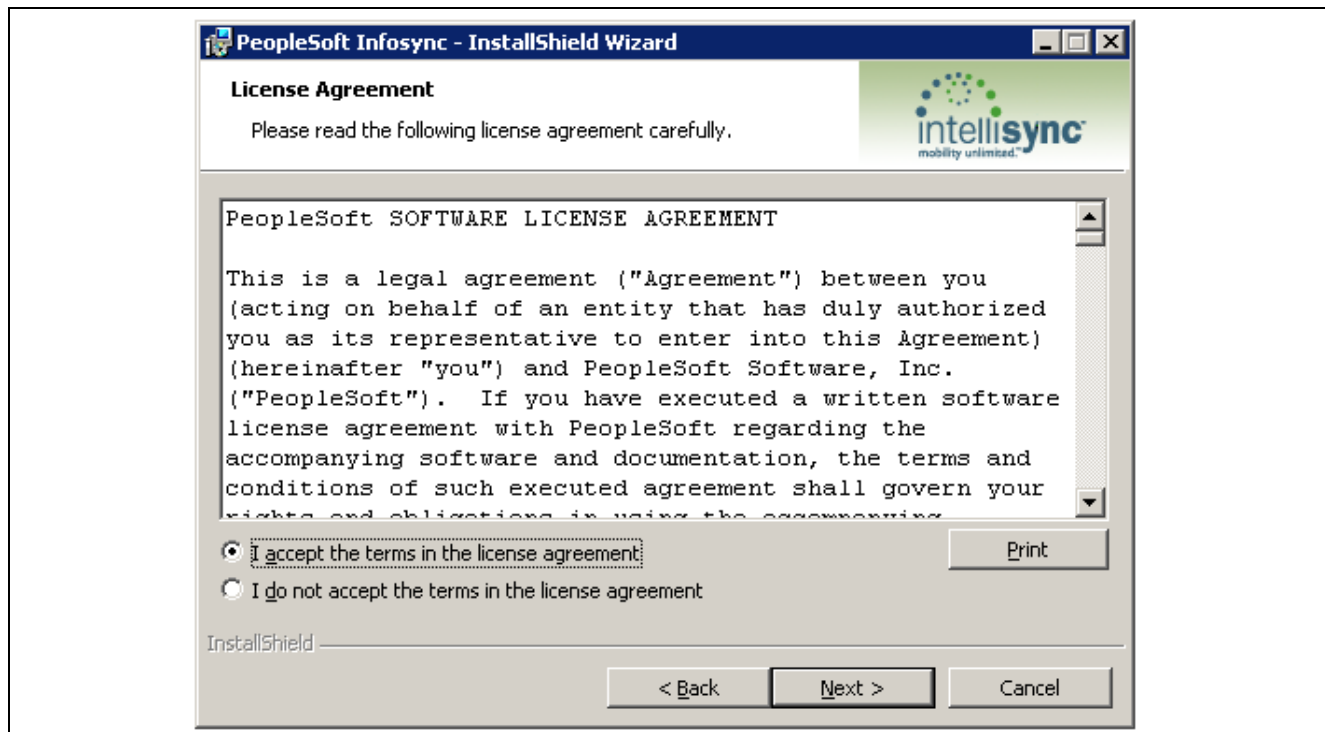
To install the PeopleSoft Infosync Client:

1. Double-click the setup.exe in the DISK1 directory.
2. Click Next.



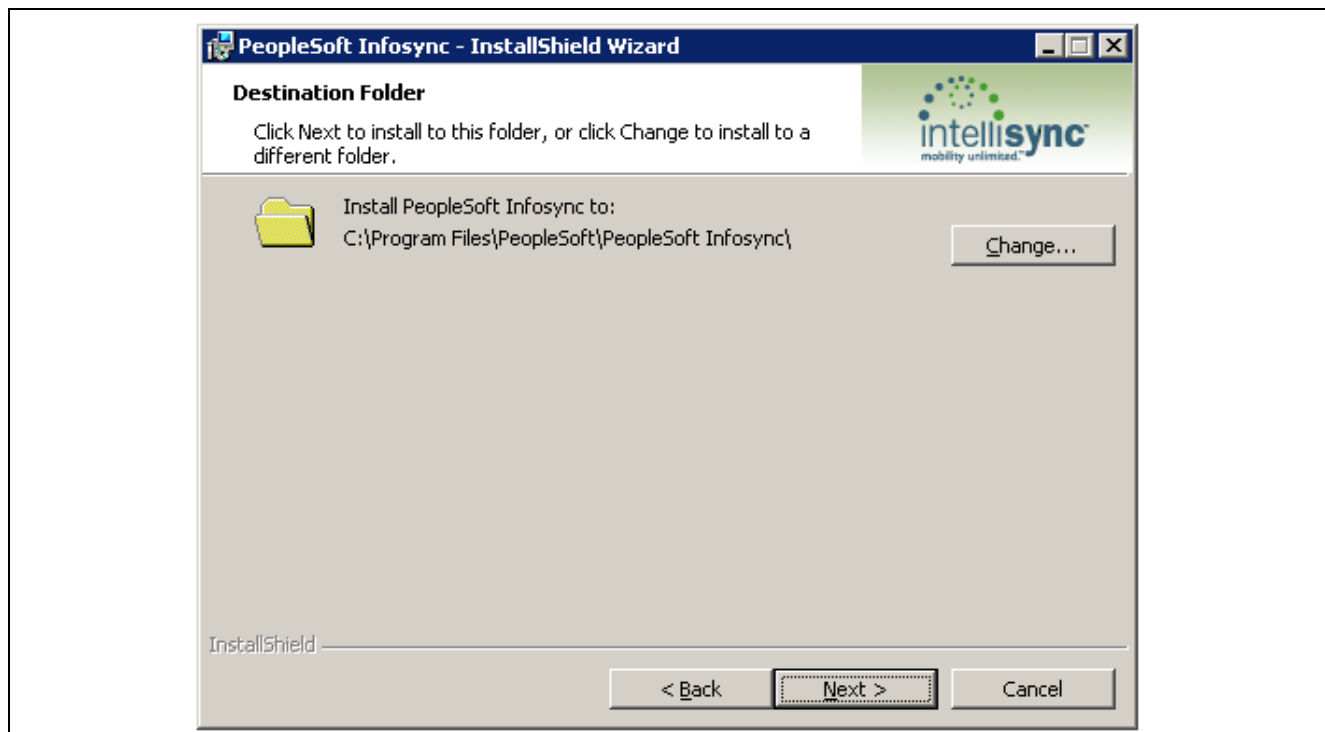
PeopleSoft Infosync - InstallShield Wizard Welcome page

3. Review and accept the license agreement and click Next



PeopleSoft Infosync License Agreement

4. Select the destination location and click Next.



PeopleSoft Infosync - InstallShield Wizard Destination Folder selection page

5. Click Install to begin installation.
6. After the PeopleSoft Infosync Client completes the install, click Finish.

7. Use any text editor to modify the configuration file named DCSSettings.CFG found in C:\Program Files\PeopleSoft\PeopleSoft Infosync and change the server URL, port, and URI to match the system setup for the PeopleSoft Integration Broker and default node.

For example:[Connection]

Server URL=<web server>

Port=80

URI=/PSIGW/HttpListeningConnector?From=PSFT\_PIM&To=PSFT\_CR&MessageName=PIM\_CONTACT\_SYNC&MessageType=sync&Password=infosync

Where <web server> is the web server machine name and PSFT\_CR is the default local node on the CRM database and defined in the integrationGateway.properties file. The “To” which precedes the default local node must have a lowercase *o*, as shown in the previous example.

---

## Task 11-12: Running the PeopleSoft Infosync Client

This section discusses:

- Setting Up the PeopleSoft Infosync Client
- Running the PeopleSoft Infosync Client for Synchronization

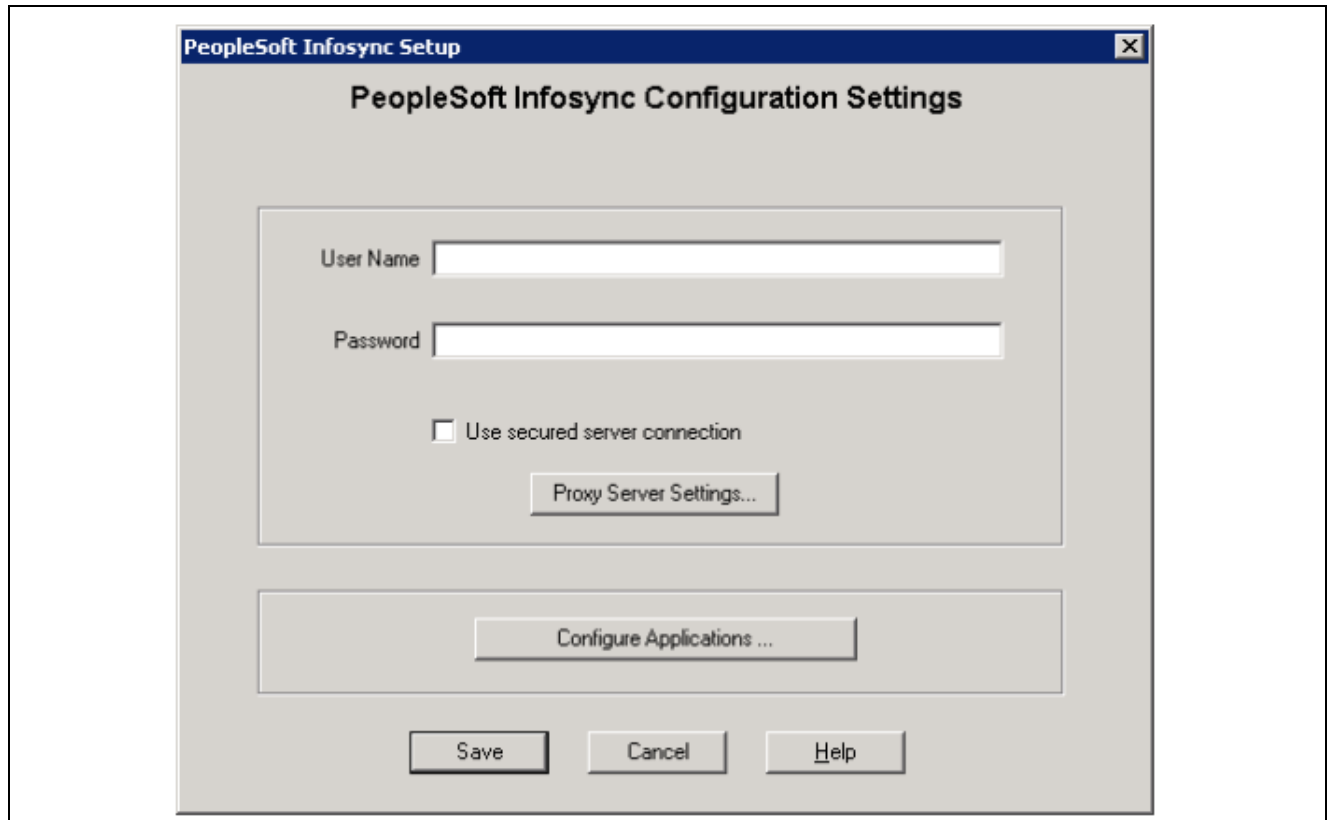
### Task 11-12-1: Setting Up the PeopleSoft Infosync Client

The first task in configuring the PeopleSoft Infosync solution is to select which PIM applications your end-users are running.

To set up the PeopleSoft Infosync Client:

1. Select Start, Programs, PeopleSoft Inc, PeopleSoft Infosync, PeopleSoft Infosync to start the PeopleSoft Infosync Client.
2. Click the Setup button to specify synchronization settings.
3. Enter a user name and password for synchronization

The User must have a PIM preference ID assigned.



PeopleSoft Infosync Setup dialog box

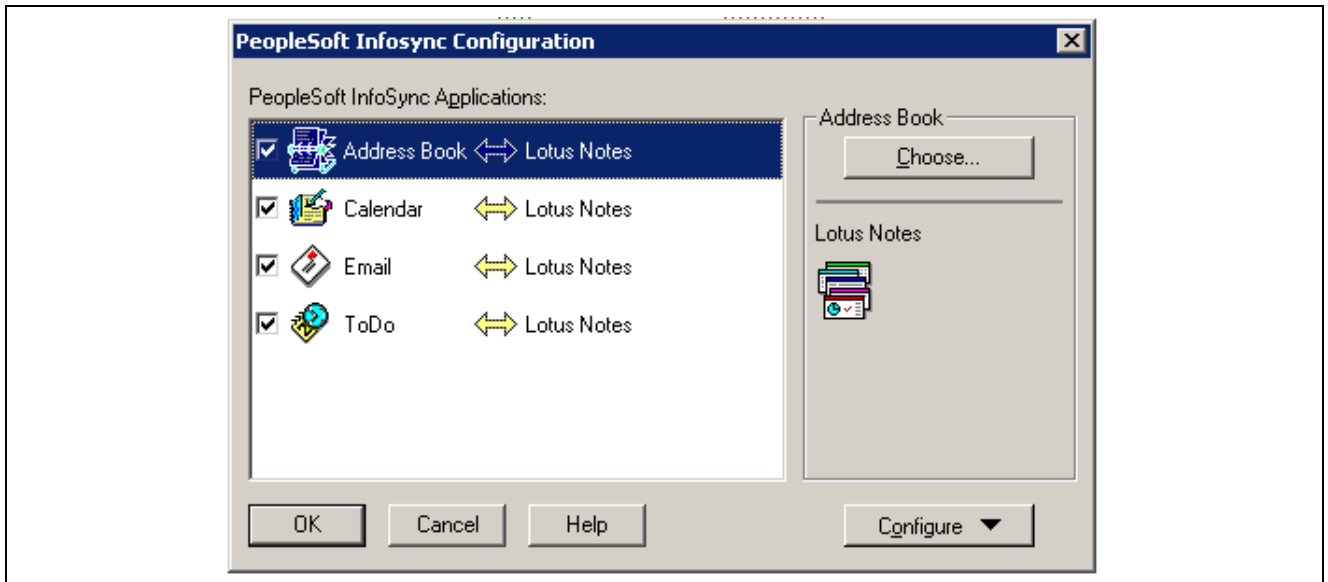
---

**Note.** A PIM preference ID must be assigned to users before they can synchronize their data. A user's PIM Preference ID is set in the PeopleSoft CRM database. Log in to the PeopleSoft CRM database using PeopleSoft Pure Internet Architecture and select Set Up CRM, Security, User Preferences. Search for the user ID and select the PIM preference ID for the user. Click Save.

---

4. Click Configure Applications
5. Click Configure and choose PeopleSoft Infosync Options. Make sure the Connection URL has the correct URI as entered in your DCSSettings.cfg file.





Infosync Configuration

6. Select the Address Book and click Choose.
7. Select the correct PIM software that your end-users are running: either Lotus Notes or Microsoft Outlook.
8. Repeat steps 4 and 5 for Calendar, Email and ToDo. Email will prompt you for the user's password on the mail server.
9. Select Address Book and select Configure, Advanced Settings.
  - Select the Confirmation tab.  
If you want your end users to confirm deletes, select the first check box. If you want your end users to confirm adds and changes, select the second check box.
  - Select the Conflict Resolution tab.  
Select the option button for the conflict that you want to run.
  - Select the Filters tab.  
The filter that is delivered is Categories. Select the appropriate filter or you can create your own filter.
10. Select Calendar and select Configure, Advanced Settings.
  - Select the Date Range tab.  
Select the appropriate date range to synchronize.
  - Select the Confirmation tab.  
If you want your end user to confirm deletes, select the first check box. If you want your end users to confirm adds and changes, select the second check box.
  - Select the Conflict Resolution tab. Select the radio button for the conflict that you wish to run.
  - Select the Filters tab.  
The three filters that are delivered are Exclude Private Data, Categories, and Categories and Private. Select the appropriate filter or you can create your own filter.
11. Select Email and select Configure, Advanced Settings.

- Select the Confirmation tab.

If you want your end users to confirm deletes, select the first check box. If you want your end users to confirm adds and changes, select the second check box.

- Select the Conflict Resolution tab.

Select the option button for the conflict that you want to run.

- Select the Filter tab.

Create your own appropriate filter.

12. Select ToDo and select Configure, Advanced Settings.

- Select the ToDo tab.

Select the appropriate option button for transferring the ToDo items.

- Select the Confirmation tab.

If you want your end user to confirm deletes, select the first check box. If you want your end users to confirm adds and changes, select the second check box.

- Select the Conflict Resolution tab.

Select the option button for the conflict that you want to run.

- Select the Filters tab.

The three filters that are delivered are Exclude Private Data, Categories, and Categories and Private. Select the appropriate filter or you can create your own filter.

13. Click OK then clickSave.

## **Task 11-12-2: Running the PeopleSoft Infosync Client for Synchronization**

To run the PeopleSoft Infosync Client for synchronization:

1. Select Start, Programs, PeopleSoft Inc, PeopleSoft Infosync, PeopleSoft Infosync to start the PeopleSoft Infosync Client.
2. Click the Sync button to synchronize your data.

## CHAPTER 12

# Setting Up PeopleSoft Online Marketing 9 and PeopleSoft Student Administration 8.9/9.0 Integration

This chapter discusses:

- Understanding PeopleSoft Online Marketing 9 and PeopleSoft Student Administration 8.9/9.0 Integration
- Prerequisites
- Setting Up PeopleSoft Student Administration Database for PeopleSoft OLM Integration
- Setting Up PeopleSoft Online Marketing for PeopleSoft Student Administration Integration

---

## Understanding PeopleSoft Online Marketing 9 and PeopleSoft Student Administration 8.9/9.0 Integration

This chapter provides instructions for integrating Oracle's PeopleSoft Enterprise Online Marketing (OLM) 9 and PeopleSoft Enterprise Student Administration 8.9 and 9.0 (SA 8.9/9.0).

---

**Note.** Before proceeding with your installation, consult Oracle's PeopleSoft Customer Connection website to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.4x Installation guide for your database platform and *PeopleSoft Enterprise PeopleTools 8.4x PeopleBooks*.

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**Note.** Consult Oracle's PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index that can be found on Oracle's PeopleSoft Customer Connection website, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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## Prerequisites

Before you begin PeopleSoft OLM and PeopleSoft SA installation and integration, ensure that these requirements are met:

- Install and configure a PeopleSoft CRM 9 database.
- Install and configure a PeopleSoft SA database (PeopleSoft SA 8.9 and 9.0 are now part of Human Capital Management 8.9/9.0).

---

**Note.** Configuring the PeopleSoft SA database for integration to a PeopleSoft CRM database requires that you carry out tasks on *both* the PeopleSoft CRM database and the PeopleSoft SA database. The task *Setting Up the Student Administration Database for OLM Integration*, describes the steps that you must perform on the PeopleSoft SA database. The task *Setting Up Online Marketing for PeopleSoft Student Administration Integration*, describes the steps that you must perform on the PeopleSoft CRM database.

Complete this task for both the PeopleSoft CRM database and the PeopleSoft SA database:

Setting Up the FTP Server for the PeopleSoft Student Administration Database.

---

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## Task 12-1: Setting Up PeopleSoft Student Administration Database for PeopleSoft OLM Integration

This section discusses:

- Setting Up and Testing the EIP Configuration
- Defining Full Data Publish Rules
- Setting Service Operations Security
- Granting Security for Application Engine Processes and New Pages
- Using the ADCRMPST Job Definition
- Using the SAD\_CRM\_SYN2 Process Definition

---

**Note.** Complete the steps in this section on the PeopleSoft SA database.

---

### Task 12-1-1: Setting Up and Testing the EIP Configuration

This section discusses:

- Verifying the Local Gateway Properties
- Setting Up PeopleSoft CRM External Node Connector
- Testing the PeopleSoft CRM Node
- Activating the Domain

#### Verifying the Local Gateway Properties

To verify the local Gateway properties:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for the Integration Gateway ID.

URL format: `http://<SA machine_name>:<port>/PSIGW/PeopleSoftListeningConnector`

---

**Note.** Local Gateway properties are set up during the PeopleSoft SA 9 installation.

---

#### Setting Up PeopleSoft CRM External Node Connector

To set up the PeopleSoft CRM external node connector:

1. Select PeopleTools, Integration Broker, Node Definitions.
2. Search for the node PSFT\_CR.
3. Ensure that the Active Node check box is selected.
4. Configure the node connection as follows:
  - a. Select the Connectors tab, and ensure that the Connection ID is set to *PSFTTARGET*.

The following is an example of the Connectors tab:

The screenshot shows the 'Connectors' tab for the 'PSFT\_CR' node. The 'Gateway ID' is set to 'LOCAL' and the 'Connector ID' is 'PSFTTARGET'. A message indicates that this connector does not have properties and to use the Gateways Page for setup. There are buttons for 'Save', 'Return to Search', and 'Ping Node'. A link for 'Gateway Setup Properties' is also visible.

PSFT\_CR\_Node\_Connectors page

- b. Click the Gateway Setup Properties link, enter the user ID and password, and click OK.
  - c. Set the URL value to that of the PeopleSoft CRM local gateway for the PSFT\_CR node.
  - d. The URL format is `http:// <CRM_machinename>:<port>/servlets/gateway`.
5. Click OK.
6. Click Save.
7. Click the Routings tab to ensure that all of the following routings are defined, and set to the *Active* status, for this PeopleSoft CRM node:
  - CS\_ADM\_APPL\_DATA\_FULLSYNC
  - CS\_ADM\_PRSPCT\_DATA\_FULLSYNC
  - CS\_EMAIL\_NOTICE
  - CS\_PERS\_DATA\_EXTEND\_FULLSYNC
  - CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC
  - CS\_SCRTY\_APPL\_CTR\_FULLSYNC
  - CS\_SCRTY\_RECR\_CTR\_FULLSYNC
  - CS\_STUDENT\_BOID\_SYNC
  - CS\_STUDENT\_TOPIC\_SYNC
  - CS\_T189\_ADM\_APPL\_SYNC
  - CS\_TEST\_SCORES\_FULLSYNC

The following is an example of the Routings page for this PSFT\_CRM node:

Node Definitions
Connectors
Portal
WS Security
Routings

Node Name:
PSFT\_CR

Routing Name:

ADD

Routing Definitions

Customize

Find

View 10

First

1-46 of 46

Last

Selected	Name	Service Operation	Service Operation Version	Routing Type	Sender Node	Receiver Node	Status
<input type="checkbox"/>	~GEN-UPG~27475	BUS_UNIT_HR_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~19939	BUS_UNIT_HR_SYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~28954	CM_TYPE_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~25174	CM_TYPE_SYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~29247	COMPETENCY_FULLSYNC1	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~21243	COMPETENCY_SYNC1	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~25438	COUNTRY_FULLSYNC	VERSION_2	Asynch	H900P20	PSFT_CR	Inactive
<input type="checkbox"/>	~GEN-UPG~22636	COUNTRY_SYNC	VERSION_2	Asynch	H900P20	PSFT_CR	Inactive
<input checked="" type="checkbox"/>	CS_ADM_APPL_DATA_FULLSYNC	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_ADM_PRSPCT_DATA_FULLSYNC	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_EMAIL_NOTICE	CS_EMAIL_NOTICE	VERSION_1	Asynch	PSFT_CR	H900P20	Active
<input checked="" type="checkbox"/>	CS_PERS_DATA_EXTEND_FULLSYNC	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_PRFL_ATTR_CHOICES_FULLSYNC	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_SCRTY_APPL_CTR_FULLSYNC	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_SCRTY_RECR_CTR_FULLSYNC	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_STUDENT_BOID_SYNC	CS_STUDENT_BOID_SYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
<input checked="" type="checkbox"/>	CS_STUDENT_TOPIC_SYNC	CS_STUDENT_TOPIC_SYNC	VERSION_1	Asynch	PSFT_CR	H900P20	Active
<input checked="" type="checkbox"/>	CS_T189_ADM_APPL_SYNC	CS_T189_ADM_APPL_SYNC	VERSION_1	Asynch	PSFT_CR	H900P20	Active
<input checked="" type="checkbox"/>	CS_TEST_SCORES_FULLSYNC	CS_TEST_SCORES_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active

Routings page showing an Active status for all routings for this PeopleSoft CRM node

## Testing the PeopleSoft CRM Node

To test (ping) the PeopleSoft CRM node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft CRM default local node (for example, *PSFT\_CR*).
3. Click the Ping Node button and verify that *Success* appears in the Message Text column.

## Activating the Domain

To activate the domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
2. In the Domains grid, ensure that the Domain Status of the machine of gateway is set to *Active*.

If it is not, select *Active*, click the Update button, and then click Refresh.

## Task 12-1-2: Defining Full Data Publish Rules

You must define a rule for each full sync message that is defined in your system.

**Note.** In this task you configure full table publish rules for *PERSON\_BASIC\_FULLSYNC*. The first full publish sync that you perform using *PERSON\_BASIC\_FULLSYNC* will publish all EMPLIDs in your PeopleSoft HCM database to PeopleSoft CRM. This is necessary to populate the appropriate PeopleSoft CRM tables that may later be updated by subsequent incremental personal data updates using *PERSON\_BASIC\_SYNC*.

To define full data publish rules:

1. Select Enterprise Components, Integration Definitions, Full Data Publish Rules.
2. Create full data publish rules for the message CS\_ADM\_APPL\_DATA\_FULLSYNC as follows:

**Full Table Publish Rules** | **Record Mapping** | **Languages**

**Message Name:** CS\_ADM\_APPL\_DATA\_FULLSYNC

**Description:** Applicant Data

**Publish Rule Definition** Find | View All First 1 of 1 Last

**\*Publish Rule ID:** CS\_ADM\_APPL\_DATA\_FULLSYNC

**\*Description:** Applicant FullSync Publish

**\*Status:** Active

**Chunking Rule ID:**

**Alternate Chunk**

**Table:**

**Message Options**

☒ Create Message Header

☐ Create Message Trailer

**Output Format**

☒ Message

☐ Flat File

☐ Flat File with Control Record

Save | Return to Search | Previous in List | Next in List | Notify

[Full Table Publish Rules](#) | [Record Mapping](#) | [Languages](#)

Example of Full Table Publish Rules page

- a. Select the Full Table Publish Rules tab and enter a Publish Rule ID and a Description.
- b. Select *Active* from the Status drop-down list.
- c. In the Message Options section, select the Create Message Header check box.
- d. Select the Record Mapping tab and enter the following information:

Full Table Publish Rules | **Record Mapping** | Languages

**Message Name:** CS\_ADM\_APPL\_DATA\_FULLSYNC

**Description:** Applicant Data

**Publish Rule Definition** Find | View All First 1 of 1 Last

**\*Publish Rule ID:** CS\_ADM\_APPL\_DATA\_FULLSYNC

**\*Description:** Applicant FullSync Publish

**Record Source Mapping** Find | View All First 1-4 of 4 Last

Message Record Name:	Source/Order by Record Name:
ADM_APPL_DATA	SAD_CRM_FLT_DAT
ADM_APPL_PROG	SAD_CRM_FLT_PRG
ADM_APPL_PLAN	SAD_CRM_FLT_PLN
ADM_APPL_SBPLAN	SAD_CRM_FLT_SPL

Save Return to Search Previous in List Next in List Notify

[Full Table Publish Rules](#) | [Record Mapping](#) | [Languages](#)

Example of Record Mapping page showing Full Table Rules

Message Record Name	Source/Order by Record Name
ADM_APPL_DATA	SAD_CRM_FLT_DAT
ADM_APPL_PROG	SAD_CRM_FLT_PRG
ADM_APPL_PLAN	SAD_CRM_FLT_PLN
ADM_APPL_SBPLAN	SAD_CRM_FLT_SPL

3. Create a rule for each of the following messages and ensure that you select the Header option for each message.

Message Name	Message Record Name	Source/Order by Record Name
CS_ADM_PRSPCT_DATA_FULLSYNC	ADM_PRSPCT_CAR	SAD_CRM_FLT_PRS
CS_PERS_DATA_EXTEND_FULLSYNC	ADM_INTERESTS	SAD_CRM_FLT_ADM
	DISABILITY	SAD_CRM_FLT_DIS
	DIVERSITY	SAD_CRM_FLT_DIV
	EXTRACUR_ACTVTY	SAD_CRM_FLT_EXT
	EXT_ACAD_DATA	SAD_CRM_FLT_ACD
	EXT_ACAD_SUM	SAD_CRM_FLT_ACS
	PERSONAL_DATA	SAD_CRM_FLT_PER
	SRVC_IND_DATA	SAD_CRM_FLT_SRV
CS_SCRTY_APPL_CTR_FULLSYNC	No mapping required	



Message Name	Message Record Name	Source/Order by Record Name
CS_SCRTY_RECR_CTR_FULLSYNC	No mapping required	
CS_TEST_SCORES_FULLSYNC	STDNT_TEST	SAD_CRM_FLT_TST

4. Create publish rules for PERSON\_BASIC\_FULLSYNC.
  - a. Select the Full Table Publish Rules tab and enter a Publish Rule ID and a Description (for example, *Person\_Basic\_Full*).
  - b. Select *Active* from the Status drop-down list.
  - c. In the Message Options section, select the Create Message Header check box.
  - d. Select the Record Mapping tab and enter the following:  
 In the Message Record Name field, enter *PERSON*.  
 Do *not* specify a Source/Order by Record name.
  - e. Select the Full Table Publish Rules tab and enter a Publish Rule ID and a Description (for example, *Person\_Basic\_Inc*).
  - f. Select *Inactive* from the Status drop-down list.
  - g. In the Message Options section, select the Create Message Header check box.
  - h. Select the Record Mapping tab and enter the following:  
 In the Message Record Name field, enter *PERSON*.  
 In the Source/order by Record name field, enter *SAD\_CRM\_FLT\_BAS*.

---

**Note.** You can use this new row to perform incremental full sync publishes that are based on the last run date of the process.

---

The first row is active for the first full publish sync that you perform and does not use a filtering view. All EMPLIDS in your PeopleSoft HCM database will be published by this full sync.

After the first run, you can switch the first row to inactive and then activate the second row. The second row uses a view based on PS\_SAD\_CRM\_FLT\_BAS to filter the integration, based on EMPLIDS that exist in the PS\_SAD\_CRM\_EMPLIDS table, and has a PERS\_DATA\_EFFDT that is greater than or equal to the last run date of the process.

5. Load profile choices for the message CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC:
  - a. Select the Full Table Publish Rules tab to create a new row for each of the choice types that are listed in Step 5e.
  - b. Create a unique Publish Rule ID and Description for each.
  - c. Set the status to *Active*.
  - d. Clear the Create Message Header and Create Message Trailer options.
  - e. Select the Record Mapping tab. For the Message Record Name of SAD\_CRM\_ACH\_WRK, configure the following:

Publish Rule ID	Description	Source/Order by Record Name
ACTIONS	Program Actions	SAD_CRM_ACTN_VW
APP_CENTERS	Application Centers	SAD_CRM_ACTR_VW
ACTIVITIES	Extracurricular Activities	SAD_CRM_ACTV_VW
ADMIT_TERMS	Admit Terms	SAD_CRM_ATRM_VW
ADMIT_TYPES	Admit Types	SAD_CRM_ATYP_VW
CAMPUS	Campus	SAD_CRM_CAMP_VW
EXT_SUBJECTS	External Subjects	SAD_CRM_ESUB_VW
EXT_TERMS	External Terms	SAD_CRM_ETRM_VW
EXP_GRAD_TERMS	Expected Graduation Terms	SAD_CRM_GTRM_VW
GPA_TYPES	GPA Types	SAD_CRM_GTYP_VW
INSTITUTIONS	Institutions	SAD_CRM_INST_VW
PLANS	Academic Plans	SAD_CRM_PLAN_VW
PROGRAMS	Academic Programs	SAD_CRM_PROG_VW
RECRUIT_CAT	Recruiting Categories	SAD_CRM_RCAT_VW
REC_CENTERS	Recruiting Centers	SAD_CRM_RCTR_VW
ACTN_REASONS	Academic Program Action Reasons	SAD_CRM_RSN_VW
REFERRAL_SOURCE	Referral Source	SAD_CRM_RSRC_VW
REQ_TERMS	Requirement Terms	SAD_CRM_RTRM_VW
SUMM_TYPES	Summary Types	SAD_CRM_SMTT_VW
SUB_PLANS	Academic Sub-Plans	SAD_CRM_SPLN_VW
SRVC_IND	Service Indicators	SAD_CRM_SRVC_VW
TERMS	Terms	SAD_CRM_STRM_VW
TEST_COMP	Test Components	SAD_CRM_TCMP_VW
TEST_ID	Test IDs	SAD_CRM_TEST_VW

### Task 12-1-3: Setting Service Operations Security

To set Service Operations Security:

1. Select Home, PeopleTools, Security, Permission Lists.
2. Select the appropriate permission list (for example, *HCSPSERVICE*).
3. Select the Web Services tab.
4. Verify that FULL access is granted for the following messages:
  - CS\_ADM\_APPL\_DATA\_FULLSYNC
  - CS\_ADM\_PRSPCT\_DATA\_FULLSYNC
  - CS\_EMAIL\_NOTICE
  - CS\_PERS\_DATA\_EXTEND\_FULLSYNC
  - CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC
  - CS\_SCRTY\_APPL\_CTR\_FULLSYNC
  - CS\_SCRTY\_RECR\_CTR\_FULLSYNC

- CS\_STUDENT\_BOID\_SYNC
- CS\_STUDENT\_TOPIC\_SYNC
- CS\_T189\_ADM\_APPL\_SYNC
- CS\_TEST\_SCORES\_FULLSYNC
- PERSON\_BASIC\_FULLSYNC
- PERSON\_BASIC\_SYNC

## Task 12-1-4: Granting Security for Application Engine Processes and New Pages

To grant security for Application Engine processes and new pages:

1. Select Home, PeopleTools, Security, Permission Lists.
2. Select the appropriate Permission List.
3. Select the Pages tab.
4. Add the menus SAD\_CRM\_INTEGRATION, EVALUATE\_APPLICANTS, and LOAD\_EXTERNAL\_DATA.
5. Click the Edit Pages link for the SAD\_CRM\_INTEGRATION, EVALUATE\_APPLICANTS, and LOAD\_EXTERNAL\_DATA menus that you just added.
6. Click the Select All button for each menu.
7. Click OK.
8. Click OK again.
9. Click Save.

---

**Note.** You may need to sign out and sign back in to access the menu items.

---

The system delivers two methods for running the Application Engine process that posts the File Attachment Locator and Long Text Responses to the PeopleSoft SA Recruiting and Admissions transaction tables:

- You can use a *Job* that automatically runs the existing TS189 People Search/Match/Post SQR first, followed by the new PeopleSoft CRM Post File Attachments/Long Text application engine process.
- Alternatively, you can use the delivered Process Definition that runs only the PeopleSoft CRM Post File Attachments/Long Text application engine process.

This Application Engine process also publishes the CS\_STUDENT\_BOID\_SYNC message to provide EMPLID to BO\_ID mapping to PeopleSoft CRM 9.

## Task 12-1-5: Using the ADCRMPST Job Definition

To use the job definition:

1. Select Home, PeopleTools, Process Scheduler, Jobs.
2. In the Process Job field, enter *ADCRMPST*.
3. Select the Job Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

---

**Note.** If the user decides to use the Job Definition, you should delete the Process Groups for the previous EDI TS189 People Search/Match/Post (ADAPPPST).

---

## Task 12-1-6: Using the SAD\_CRM\_SYN2 Process Definition

To access the process definition:

1. Select Home, PeopleTools, Process Scheduler, Processes.
2. Enter the Process Name = *SAD\_CRM\_SYN2*.
3. Select the Process Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

The setup tasks for the installation on the PeopleSoft SA side are now complete.

---

## Task 12-2: Setting Up PeopleSoft Online Marketing for PeopleSoft Student Administration Integration

This section discusses:

- Prerequisites
- Setting Up and Testing the EIP Configuration
- Setting Up the Web Template URL in the PeopleSoft CRM Database
- Assigning Valid Mailbox Email Addresses
- Defining SETID for Inbound EIP Data
- Setting Up the FTP Server for the PeopleSoft Student Administration Database
- Populating Profile Attribute Choices from PeopleSoft SA to PeopleSoft CRM
- Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database
- Activating PeopleSoft CRM Profiles in the PeopleSoft CRM Database
- Populating Student Data from PeopleSoft SA to PeopleSoft CRM
- Modifying the Audience to be Secured on an Operator
- Deploy CS\_ Dialogs to Start Dialog Execution
- Running the TS189 Processes to Post Data (Optional)
- Posting Dialog Questions from PeopleSoft CRM to PeopleSoft SA in the PeopleSoft CRM Database (Optional)

### Prerequisites

Ensure that the following requirements are met before you begin setting up PeopleSoft SA integration:

- A fully functional PeopleSoft CRM Online Marketing (OLM) environment is installed.

See "Installing PeopleSoft Online Marketing 9."

- Security Enterprise Integration Point (EIP) settings for the Person Basic Fullsync are set.

See "Installing PeopleSoft Online Marketing 9, " Improving Online Marketing Transaction Performance.

## Task 12-2-1: Setting Up and Testing the EIP Configuration

This section discusses:

- Setting Up the JOLT Connect String for Application Servers
- Verifying the Local Gateway Properties
- Verifying the Required Routings if Defined in Local Node
- Setting Up the Student Administration External Node and Connector
- Testing the PeopleSoft CRM Default Local Node
- Testing the PeopleSoft SA Node
- Activating the Domain

### Setting Up the JOLT Connect String for Application Servers

Add the following properties in `<PS_HOME>\websevr\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\integrationGateway.properties`:

```
ig.isc.CRMNODENAME.serverURL=//CRMServerMachine:9000
ig.isc.CRMNODENAME.userid= opuserId
ig.isc.CRMNODENAME.password= opuserIPwd (encrypted password)
ig.isc.CRMNODENAME.toolsRel=CRM Tools version (8.48 for CRM 9)
```

CRMNODENAME is the PeopleSoft CRM default local node name (for example, *PSFT\_CR*).

### Verifying the Local Gateway Properties

To verify the local Gateway properties:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for the Integration Gateway ID.

URL format: `http://<CRM machine_name>:<port>/PSIGW/PeopleSoftListeningConnector`

---

**Note.** Local Gateway properties are set up during the PeopleSoft CRM 9 installation.

---

### Verifying the Required Routings if Defined in Local Node

To verify the required routings:

1. Select PeopleTools, Integration Broker, Integration Set up, Nodes.
2. Search for the default local node (for example, *PSFT\_CR*).
3. Select the Routings tab and ensure that the routings shown in the following Default Local Node page are defined and active:

Node Name: PSFT\_CR

Routing Name:  Add

Routing Definitions

Name	Service Operation	Service Operation Version	Routing Type	Sender Node	Receiver Node	Status
~GENERATED~29261 RY_XMSG_AREQ		VERSION_1	Asynch	~~ANY~~	PSFT_CR	Active
~GENERATED~27910 RY_XMSG_SREQ		VERSION_1	Synch	~~ANY~~	PSFT_CR	Active

Default Local Node page

## Setting Up the Student Administration External Node and Connector

To set up the PeopleSoft SA external node and connector:

1. Select PeopleTools, Integration Broker, Integration Set up, Nodes.
2. Search for the node PSFT\_HR.
3. Ensure that the Active Node check box is selected.
4. Configure the node connection as follows:
  - a. Select the Connectors tab, and ensure that the Connection ID is set to *PSFTTARGET* for PeopleSoft SA 8.9/9.0.

Example of the Connectors tab:

Node Name: PSFT\_HR Ping Node

Details

Gateway ID:  🔍

Connector ID:  🔍

PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)

This connector does not have properties. Use Gateways Page to setup.

Save Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Connectors page

- b. Click the Gateway Setup Properties link, enter the user ID and password, and click OK.

**PeopleSoft Node Configuration**

URL: <http://adas0180.peoplesoft.com/PSIGW/PeopleSoftListeningConnector>

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release
//adas0180:9000	CVP1	*****	8.50-117-R2

PeopleSoft Nodes Customize | Find | View All | First 1-2 of 2 Last

Node Name	App Server URL	User ID	Password	Tools Release	
PSFT_CR	//adas0180:9000	CVP1	*****	8.50-117-R2	Ping Node + -
PSFT_HR	//10.176.103.215:9000	PS	**	8.50-116-R2	Ping Node + -

[Advanced Properties Page](#)

OK Cancel Save Main Content

PeopleSoft Node Configuration page

- c. Set the SA server and port for node PSFT\_HR.
5. Click OK.
6. Click Save.
7. Click the Routings tab to ensure that all of the routings are active and verify that the required routings are defined for this PeopleSoft SA node.

Node Definitions Connectors Portal WS Security **Routings**

Node Name: PSFT\_HR

Routing Name:  Add

Routing Definitions Customize | Find | View 10 | First 15-114 of 132 Last

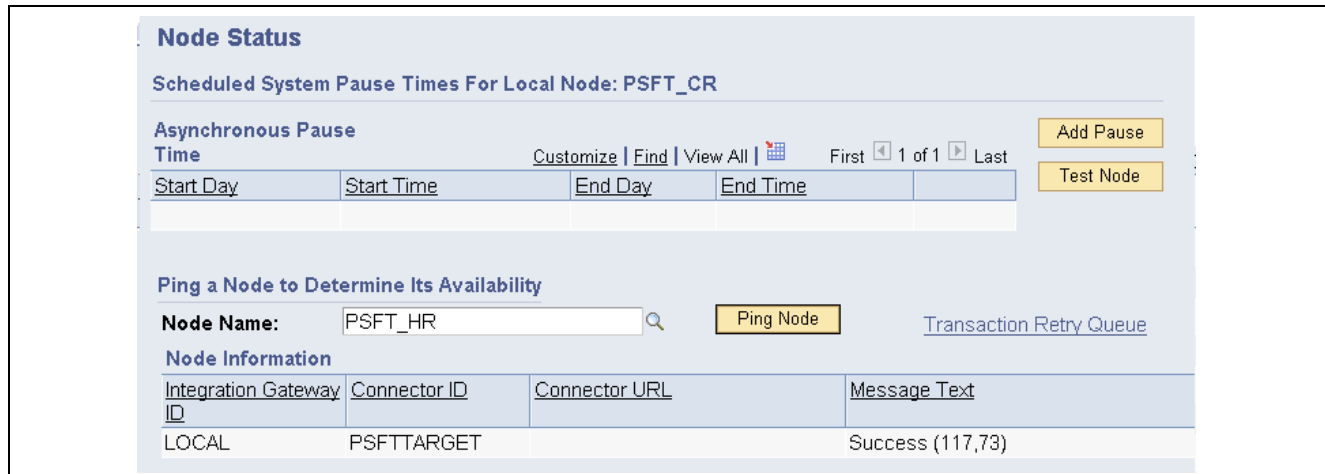
Selected	Name	Service Operation	Service Operation Version	Routing Type	Sender Node	Receiver Node	Direction	Status
<input type="checkbox"/>	<a href="#">~GEN-UPG-18738</a>	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-22311</a>	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-11269</a>	CS_APPL_BIO_SYNC	VERSION_1	Asynch	PSFT_CR	PSFT_HR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-25659</a>	CS_EMAIL_NOTICE	VERSION_1	Asynch	PSFT_CR	PSFT_HR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-15250</a>	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-22168</a>	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-10301</a>	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-21127</a>	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-20091</a>	CS_STUDENT_BOID_SYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-17075</a>	CS_STUDENT_TOPIC_SYNC	VERSION_1	Asynch	PSFT_CR	PSFT_HR		Active
<input type="checkbox"/>	<a href="#">CS_T189_ROUTING</a>	CS_T189_ADM_APPL_SYNC	VERSION_1	Asynch	PSFT_CR	PSFT_HR		Active
<input type="checkbox"/>	<a href="#">~GEN-UPG-10562</a>	CS_TEST_SCORES_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR		Active

PeopleSoft Routings page

## Testing the PeopleSoft CRM Default Local Node

To test (ping) the PeopleSoft CRM default local node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft CRM default local node (for example, *PSFT\_CR*).
3. Click the Ping Node button and verify that *Success* appears in the Message Text column.



**Node Status**

Scheduled System Pause Times For Local Node: PSFT\_CR

**Asynchronous Pause Time**

Customize | Find | View All | First 1 of 1 | Last

Start Day	Start Time	End Day	End Time

[Add Pause](#) [Test Node](#)

**Ping a Node to Determine Its Availability**

Node Name:  [Ping Node](#) [Transaction Retry Queue](#)

**Node Information**

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

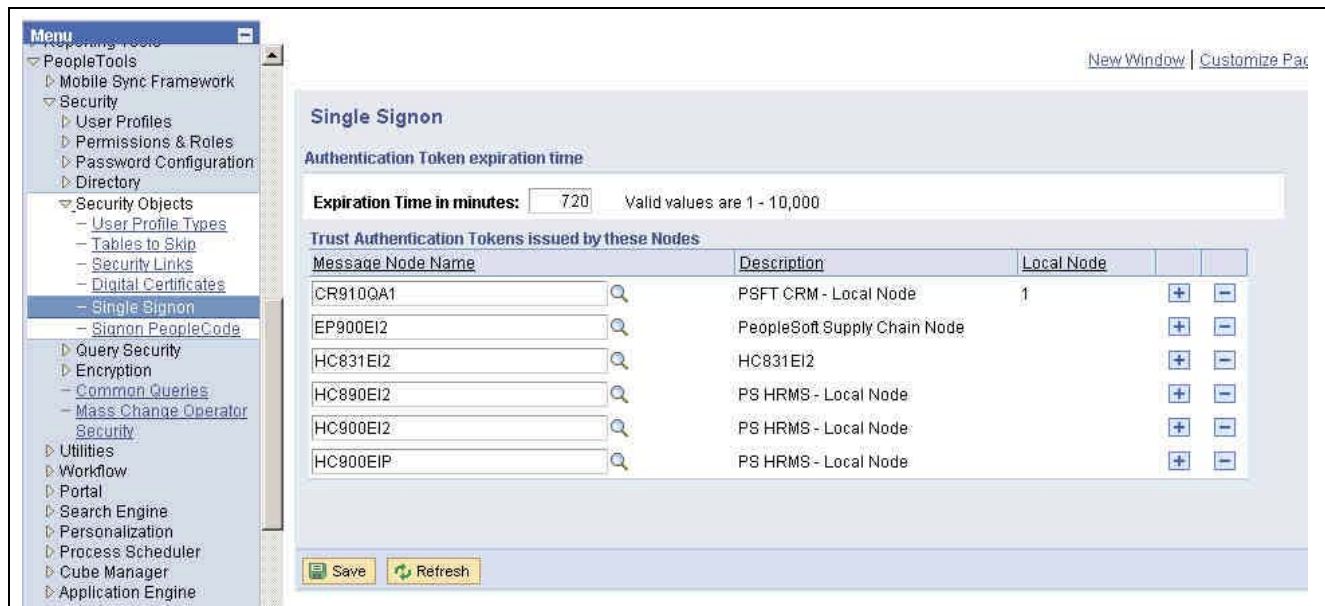
Node Status page for PeopleSoft CRM local node

**Important!** During the PeopleSoft SA integration set up, on the PeopleSoft CRM side, the instructions prompt you to set up and ping the local nodes. However, if these local nodes are not set up in PeopleSoft Single Signon, the ping will fail with the following error:

“Authentication Failed for Node<Node Name> (158,454).”

To resolve this, use your left pane navigation to select PeopleTools, Security, Security Objects, Single Signon, to access the PeopleSoft Single Signon page. On the PeopleSoft Single Signon page, add the nodes and then click Save. You can now ping the local nodes and receive a successful response.

Refer to the following example to view the nodes:



**Single Signon**

Authentication Token expiration time

Expiration Time in minutes:  Valid values are 1 - 10,000

Trust Authentication Tokens issued by these Nodes

Message Node Name	Description	Local Node
CR910QA1	PSFT CRM - Local Node	1
EP900EI2	PeopleSoft Supply Chain Node	
HC831EI2	HC831EI2	
HC890EI2	PS HRMS - Local Node	
HC900EI2	PS HRMS - Local Node	
HC900EIP	PS HRMS - Local Node	

[Save](#) [Refresh](#)

PeopleSoft Single Signon page showing the PeopleSoft CRM node CR910QA1 listed as the Local Node

## Testing the PeopleSoft SA Node

To test (ping) the PeopleSoft SA node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.



- In the Message Node Name field, enter the PeopleSoft SA default local node (for example, *SA890CR2* or *SA801CR2*).
- Click the Ping Node button and verify that *Success* appears in the Message Text column:

**Node Status**

Scheduled System Pause Times For Local Node: PSFT\_CR

Asynchronous Pause Time [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#) [Add Pause](#)

Start Day	Start Time	End Day	End Time

[Test Node](#)

Ping a Node to Determine Its Availability

Node Name:  [Ping Node](#) [Transaction Retr Queue](#)

Node Information

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Node Status page for the PeopleSoft SA local node

## Activating the Domain

To activate the domain:

- Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
- In the Domains grid, ensure that the Domain Status of the machine of gateway is set to *Active*.  
If it is not, select *Active*, click the Update button, and then click Refresh.

## Task 12-2-2: Setting Up the Web Template URL in the PeopleSoft CRM Database

To set up the web template URL to a valid template file location in the PeopleSoft CRM database:

- Select Set Up CRM, Product Related, Online Marketing, Template Setup.
- Enter *PSUSI* in the SETID field and click the Search button.
- For each Template ID with prefix CS in the description field, do the following:
  - Open the template.
  - Replace the *<DES Server>:<port>* with the valid DES server in the URL.  
URL format: *http://<DES Server>:<port>/DCS/Sample/SA/templates/GLAKE\_Undergrad.html*

## Task 12-2-3: Assigning Valid Mailbox Email Addresses

To assign valid mailbox email addresses:

- Select Set Up CRM, Product Related, Online Marketing, Mailbox Setup.
- Assign valid email addresses to each of these mailboxes:

MAILBOX	Mailbox Type	Forwarding Address
<a href="#">10000</a>	Normal	from@changeme.com
<a href="#">10001</a>	Bounced	bounce@changeme.com
<a href="#">10002</a>	Normal	reply@changeme.com

Mailbox Setup Search page

## Task 12-2-4: Defining SETID for Inbound EIP Data

To define inbound data SETID:

1. Select Main Menu, Set Up CRM, Common Definitions, Customer, Customer Installation Options.
2. Enter *PSUSI* in the Default SetID for Inbound EIPs field, and then click Save.

### Customer Data Management System Options

#### System Settings

☒ **Search for CM Before Adding**

This feature allows you to search for an existing contact method based on all the fields you provide for a new contact method. If an exact match is found, then instead of adding a new Contact Method, the existing one will be used as a reference.

☒ **Show Contact Method Search**

This feature allows the user of the Customer Data Management components to enter contact method information into the page and then search for matching contact methods. If this option is not selected, the Search button will not be shown on the Edit Contact Method pages.

☒ **Process Basic Data Summary**

This feature will update the basic data tables and override the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing, the data import process, and PeopleSoft CRM Mobile. The checkbox must be selected when these products are installed.

☒ **Secure Quick Create Access**


This feature restricts access to the Quick Create functionality based on the user's security access to the Customer Data Model components, as defined by the user's Permission List.

☐ **Enable Binds for Oracle**

This feature enables the BO Search SQL generation for the Oracle platform utilizing bind variables. If unchecked, search criteria value are embedded into the SQL string and bind variables are not used.

☐ **SCM Integrated Through EIP**

**Default SetID for Inbound EIPs**



#### Mobile Customer Options

**Modified** 01/15/2003 7:56PM PST CVP1

Customer Data Management System Options page

## Task 12-2-5: Setting Up the FTP Server for the PeopleSoft Student Administration Database

### Understanding the FTP Server Setup

When the applicant uploads a file attachment to the PeopleSoft CRM system, it is stored on an FTP server that is defined in the PeopleSoft CRM system. The (student-side) PeopleSoft CRM Post File Attachment/Long Text Application Engine process gets the address of the PeopleSoft CRM system FTP server from the URL table and copy that file to a PeopleSoft SA system FTP server, that also must be defined in the URL table.

---

**Important!** Complete all of the steps in this section on the PeopleSoft SA database.

---

### Defining the PeopleSoft CRM FTP Server

To define the PeopleSoft CRM FTP Server:

1. Select Home, PeopleTools, Utilities, Administration, URLs.
2. Click Add a New Value.
3. Specify the URL Identifier, for example, *CRM\_SERVER* (this identifier can be any value).
4. Click Add.
5. Enter *CRM FTP Server* in the Description field.
6. Enter the URL of the FTP server. For example: *ftp://user2:pwd2@ftp.crmserver.com/files/*

### Defining the PeopleSoft Student Administration FTP Server

To define the PeopleSoft SA FTP server:

1. Select Home, PeopleTools, Utilities, Administration, URLs.
2. Select Add a New Value.
3. Specify the URL identifier.  
For example: *SA\_SERVER* (This identifier can be any value.)
4. Click Add.
5. Enter *SA FTP Server* in the Description field.
6. Enter the URL: *ftp://user2:pwd2@ftp.saserver.com/files/*.

---

**Note.** The previous FTP address is an example of a valid FTP address. The actual value depends on the FTP address and login information for the Student-side FTP server.

---

### Defining New URL IDs on the Application Center Table

Two new fields in the Application Center table identify the PeopleSoft CRM FTP Server URL ID and the PeopleSoft SA FTP Server URL ID. Repeat this procedure for each Application Center that is loaded on the PeopleSoft CRM system side.

To define new URL IDs on the Application Center table:

1. Select Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table.
2. Enter the Application Center, for example, *UGRD*.

URGD is an example of an Application Center. This value is dependent on the user setup data and the application centers that are being used by the applications that are loaded through the PeopleSoft CRM system.

3. Enter the Student FTP Server ID as *SA\_SERVER* (or the *URL\_ID* that was created in the *URL* table for the student-side server).

See Defining the PeopleSoft Student Administration FTP Server.

4. Enter the PeopleSoft CRM FTP Server ID as *CRM\_SERVER* (or the *URL\_ID* that was created in the *URL* table for the CRM-side server).

See Defining the PeopleSoft CRM FTP Server.

## Task 12-2-6: Populating Profile Attribute Choices from PeopleSoft SA to PeopleSoft CRM

To run the process in the PeopleSoft SA database:

---

**Note.** Complete the procedure in this task on the PeopleSoft SA database.

---

1. Select Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Enter a run control ID.
3. Enter a request ID.
4. Enter a description.
5. Select Process Frequency, *Once*.
6. Select Message Name *CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC*.

## Task 12-2-7: Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database

After populating the profile attribute choices from PeopleSoft SA to PeopleSoft CRM, you must confirm data integrity. Run the PeopleSoft Data Mover scripts to clean up the attribute choice IDs.

To run the PeopleSoft Data Mover scripts to clean up the attribute choice IDs:

1. Open the PeopleSoft Configuration Manager.
2. Select the Profile tab and click the Edit button for the Default profile.
3. Select the Common tab.
4. Set the Input Directory in PeopleSoft Data Mover Directories to *<PS\_HOME>\data* (for example, *c:\Tools\data*, or *\\networkmachine\Tools\data*, or *//unixMountDir/Tools/data*).
5. Click OK.
6. Click OK again.
7. Save the configuration setting.
8. Open the script file *olmsaresetids.dms* from *<PS\_HOME>\scripts* in PeopleSoft Data Mover.
9. Select File, Run Script.

10. Recycle the application server and clear the application server cache.
11. Recycle the Dialog Execution Server (DES).

## Task 12-2-8: Activating PeopleSoft CRM Profiles in the PeopleSoft CRM Database

To activate PeopleSoft CRM profiles in the PeopleSoft CRM database:

1. Select Set Up CRM, Common Definitions, Profile Management, Profile Definitions.
2. Activate the 23 profiles shown on the Profile Definitions page by opening the profile, changing the status to Activated, and then saving.

**Note.** For the profile status Requested, first click the Transfer to Approve Profile link.

<a href="#">CS-ADM Applicant Data</a>	User	Many rows	CS-ADM Applicant Data	Requested
<a href="#">CS-ADM Applicant Plan</a>	User	Many rows	CS-ADM Applicant Plan	Requested
<a href="#">CS-ADM Applicant Program</a>	User	Many rows	CS-ADM Applicant Program	Requested
<a href="#">CS-ADM Applicant Recruiter</a>	User	Many rows	CS-ADM Applicant Recruiter	Requested
<a href="#">CS-ADM Applicant Sub-Plan</a>	User	Many rows	CS-ADM Applicant Sub-Plan	Requested
<a href="#">CS-ADM Extracur Activity</a>	User	Many rows	CS-ADM Extracur Activity	Requested
<a href="#">CS-ADM Service Indicators</a>	User	Many rows	CS-ADM Service Indicators	Requested
<a href="#">CS-ADM Test Results</a>	User	Many rows	CS-ADM Test Results	Requested
<a href="#">CS-PRS Prospect Career</a>	User	Many rows	CS-PRS Prospect Career	Requested
<a href="#">CS-PRS Prospect Plan</a>	User	Many rows	CS-PRS Prospect Plan	Requested
<a href="#">CS-PRS Prospect Program</a>	User	Many rows	CS-PRS Prospect Program	Requested
<a href="#">CS-PRS Prospect Recruiters</a>	User	Many rows	CS-PRS Prospect Recruiters	Requested
<a href="#">CS-PRS Prospect Sub-Plan</a>	User	Many rows	CS-PRS Prospect Sub-Plan	Requested
<a href="#">CS-Person</a>	User	One row	CS-Person	Requested
<a href="#">Customer Segment</a>	User	One row	Customer Segment	Requested
<a href="#">Privacy Options</a>	User	One row	Privacy Options	Requested
<a href="#">CS-Appl Academic</a>	User	One row	Applicant Academic	Update
<a href="#">CS-Appl Academic Documents</a>	User	One row	Applicant Academic Documents	Update
<a href="#">CS-Appl Academic History</a>	User	One row	Applicant Academic History	Update
<a href="#">CS-Appl Biographic</a>	User	One row	Applicant Biographical Data	Update
<a href="#">CS-Appl Employment</a>	User	One row	Applicant Employment History	Update
<a href="#">CS-Appl Honors Awards Extra Curr</a>	User	One row	Applicant Honors Awards Extra Curr	Update
<a href="#">CS-Appl Parents Emerg Contact</a>	User	One row	Applicant Parent & Emerg Contact	Update

Profile Definitions page

## Task 12-2-9: Populating Student Data from PeopleSoft SA to PeopleSoft CRM

### Creating Run Control for Student Data

To create Run Control for student data:

**Note.** Complete this task on the PeopleSoft SA database.

1. For PeopleSoft SA 8.9/9.0, select Main Menu, Enterprise Components, Initiate Processes, Full Data Publish.
2. Enter the run control ID. For example: *SAD\_CRM\_INTEGRATION*
3. For PeopleSoft SA 8 SP1, enter a row (using + ) with these values:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	CS_PERSON_BASIC_FULLSYNC

4. For SA 8.9/9.0, enter a row (using + ) with these values:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	PERSON_BASIC_FULLSYNC

5. For both SA 8 SP1 and SA 8.9/9.0, enter rows (using + ) with these values:

Request ID	Description	Process Frequency	Message Name
002	Extend Pers Data	Once	CS_PERS_DATA_EXTEND_FULLSYNC
003	Applicant Data	Once	CS_ADM_APPL_DATA_FULLSYNC
004	Prospect Data	Once	CS_ADM_PRSPCT_DATA_FULLSYNC
005	Test Score Data	Once	CS_TEST_SCORES_FULLSYNC
006	Application Center Security	Once	CS_SCRTY_APPL_CTR_FULLSYNC
007	Recruiting Center Security	Once	CS_SCRTY_RECR_CTR_FULLSYNC

6. Save the run control.

## Running the Integration

To run the PeopleSoft SA to PeopleSoft CRM Full Sync Integration:

---

**Note.** Complete this task on the PeopleSoft SA database.

---

- For PeopleSoft SA 8.9/9.0, select Set Up SACR, Product Related, Recruiting and Admissions, Manage CRM Integration, Populate ID Control Table.
- Enter a run control ID.
- Enter the lower limit date for applicant data.
- Enter the lower limit date for prospect data.
- Enter the lower limit date for test scores.

The dates that you enter on this page are used to create a control list of EMPL IDs that are integrated with PeopleSoft CRM. Only applicants and prospects that you create on or after the dates specified are considered for integration with PeopleSoft CRM. In addition, only test scores loaded on or after the test score as-of date are loaded into PeopleSoft CRM.

## Monitoring Service Operations

After the integration process runs and the control table loads, the FULLSYNC messages publish to the PeopleSoft CRM node. You can monitor these service operation details from the Service Operations Monitor.

To monitor service operations:

1. For PeopleSoft SA 8.9/9.0, select Home, People Tools, Integration Broker, Service Operations Monitoring, Asynchronous Services.
2. From the Publication Contracts tab, you can monitor these messages by clicking the Details link next to each message:
  - PERSON\_BASIC\_FULLSYNC (PeopleSoft SA 8.9/9.0 only)
  - CS\_PERS\_DATA\_EXTEND\_FULLSYNC
  - CS\_ADM\_APPL\_DATA\_FULLSYNC
  - CS\_ADM\_PRSPCT\_DATA\_FULLSYNC
  - CS\_TEST\_SCORES\_FULLSYNC
  - CS\_SCRTY\_APPL\_CTR\_FULLSYNC
  - CS\_SCRTY\_RECR\_CTR\_FULLSYNC

## Task 12-2-10: Modifying the Audience to be Secured on an Operator

Define an operator-secured audience to enforce that data access in PeopleSoft CRM is consistent with data access in PeopleSoft SA.

---

**Note.** This task can be done only after you populate Student Data from PeopleSoft SA to PeopleSoft CRM.

---

The PeopleSoft SA demo audiences are delivered as *not* operator-secured. Make these audiences operator secured so that only this operator, who signed into PeopleSoft Pure Internet Architecture, can communicate to this audience (defined as contacts):

- CS\_GLAKE\_UGRD\_CAMPEVENT
- CS\_GLAKE\_UGRD\_CAMPUS\_VISIT1
- CS\_GLAKE\_UGRD\_CAMPUS\_VISIT2
- CS\_GLAKE\_UGRD\_HOUSING\_SURVEY

These audiences are designed for the PeopleSoft SA Dialog and should be operator-secured. Perform the following steps for these four audiences.

To make an existing audience operator-secured:

1. Sign into PeopleSoft Pure Internet Architecture using a valid PeopleSoft SA user in PeopleSoft CRM.  
A valid PeopleSoft SA user in PeopleSoft CRM is a user that exists in both PeopleSoft CRM and PeopleSoft SA.
2. Select Sect Marketing, Manage Audiences.
3. Enter *PSUSI* in the SetID field and click Search.
4. Open an audience that you want to be secured by this user.
5. Click the Edit Selection Criteria button.
6. Click the Next Step button.
7. Modify any Operator row, and then click Save.

---

**Note.** For any new audiences that you create by clicking the Add Audience button or the Clone button, the audience is secured automatically by the current operator, unless that operator is *not* a PeopleSoft SA user.

---

## Task 12-2-11: Deploy CS\_ Dialogs to Start Dialog Execution

To execute the dialog, you must first deploy all of the CS\_ Dialogs to *live*. After the dialogs are live, the invitation emails are sent to prospects and applicants. After prospects and applicants respond and complete the Student/Applicant Application Dialog, the system sends the Student Person Data from PeopleSoft CRM to PeopleSoft SA TS189 Staging tables.

## Task 12-2-12: Running the TS189 Processes to Post Data (Optional)

After data loads into the PeopleSoft SA TS189 Staging tables, along with the Application Messages from the PeopleSoft CRM system, the data must be run through the existing TS189 Org Search, TS189 People Search/Match/Post, and PeopleSoft CRM Post File Attachments/Long Text Responses processes.

---

**Important!** Running the TS189 processes to post data is *optional* and should be performed on the PeopleSoft SA database.

---

To run the TS189 processes to post data:

1. For PeopleSoft SA 8.9/9.0, select Main Menu, Student Admissions, Application/Transcript Loads, Organization Search Process.
2. Enter a Run Control ID.
3. Click Run.
4. Verify that the Process Name is *ADAPPORG*.
5. Click OK.
6. For PeopleSoft SA 8.9/9.0, select Main Menu, Student Admissions, Application/Transcript Loads, Search/Match/Post Process.
7. Enter a Run Control ID.
8. Enter appropriate values for the EDI TS189 People Search/Post processes.
9. Click Run.
10. Depending on whether the user has set up security to enable the Job Definition or the Process Definition, select the process or job to be run: ADAPPPST, SAD\_CRM\_SYN2 (new Application Engine), or ADCRMPST (Job for both processes).

---

**Note.** The SAD\_CRM\_SYN2 process must be run after the ADAPPPST process, regardless of whether it is run as an individual process or as the Job.

---

## Task 12-2-13: Posting Dialog Questions from PeopleSoft CRM to PeopleSoft SA in the PeopleSoft CRM Database (Optional)

To post a current active dialog topic to PeopleSoft SA:



---

**Note.** This process is *optional* and can be run as often as necessary. Perform this step on the PeopleSoft CRM database.

---

1. Select Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Create a new run control ID.
3. For the Message Name, enter *CS\_STUDENT\_TOPIC\_SYNC*.
4. For the Request ID, enter a value.
5. For Process Request, select *Once*, and click Run.
6. Select the row for Process Name *EOP\_PUBLISHT* and click OK.
7. Verify the process from the Process Scheduler Monitor and Message Monitor.



## CHAPTER 13

# Installing BPEL and Deploying BPEL Processes

This chapter discusses:

- Understanding PeopleSoft/BPEL Integration
- Installing and Configuring the Oracle BPEL Process Manager
- Selecting and Installing the Software
- Applying Patches
- Configuring and Tuning the Oracle BPEL Process Manager
- Restarting the Instance
- Recording Access Information
- Creating and Configuring a BPEL Domain
- Configuring PeopleSoft for BPEL Integration
- Deploying PeopleSoft CRM BPEL Processes

---

## Understanding PeopleSoft/BPEL Integration

This chapter provides instructions for installing and configuring the PeopleSoft Integration Broker and the Oracle Business Process Execution Language (BPEL) Process Manager technologies for PeopleSoft CRM 9 applications.

Perform the tasks and steps in this chapter after you have successfully installed PeopleSoft PeopleTools, as described in the PeopleSoft Enterprise PeopleTools 8.48 installation guide for your database platform.

See *Installing PeopleSoft CRM 9 Applications*.

See *PeopleSoft Enterprise PeopleTools 8.48 Installation guide (for your database platform)*.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks*.

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on Oracle's PeopleSoft Customer Connection website to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

BPEL is widely used by PeopleSoft Order Capture, PeopleSoft Sales, and PeopleSoft Financial Services Industries (FSI). Call Center is BPEL enabled, but none of Call Center's functionality is dependant on BPEL in PeopleSoft CRM 9.0.

PeopleSoft/BPEL integration involves two primary technologies:

- The PeopleSoft Integration Broker.
- The Oracle BPEL Process Manager.

---

**Note.** You must configure *both* the PeopleSoft Integration Broker and the Oracle BPEL Process Manager technologies. This chapter covers a simple configuration of the PeopleSoft/BPEL integration.

---

You can obtain the Oracle BPEL Process Manager from two different sources:

- The JDeveloper Install (10.1.2.0.2) .

The JDeveloper BPEL Process Manager is used more for development and unit testing, but you can also use it for a simple environment with minimum workload.

- The Oracle Middle-Tier OAS Install (10.1.2.0.2).

The PeopleSoft Integration Broker configuration can be complex. In a production environment for example, Oracle recommends that you separate the service operation requests on a dedicated PeopleSoft environment (accessing the same database so that interactions by users through the PeopleSoft Pure Internet Architecture do not impact the performance of service operation fulfillment). However, for a simple environment, it is possible to have the PeopleSoft Integration Broker application services share the PeopleSoft Pure Internet Architecture application servers.

---

## Installing and Configuring the Oracle BPEL Process Manager

The following tasks detail the process for installing and configuring the Oracle BPEL Process Manager.

---

### Task 13-1: Selecting and Installing the Software

The Oracle BPEL Process Manager is found as part of two different products:

- The JDeveloper Installation (10.1.2.0.2).
- The Oracle Middle-Tier OAS Installation (10.1.2.0.2).

The JDeveloper installation is for simple testing and BPEL development, while the middle-tier OAS installation should be used for a production environment. You can use the JDeveloper BPEL Process Manager for simple environments with minimal workload. For any other environment, we recommend that you use the Oracle Middle-Tier OAS. The JDeveloper BPEL Process Manager is available with minimal setup requirements, while the Oracle Middle-Tier OAS requires additional planning for installation. The software is available on Oracles Technology Network.

See Oracle's Technology Network, <http://otn.oracle.com/bpel>

Review the installation documentation for your selected software and then perform the installation by following the corresponding installation guide.

While installing Oracle BPEL Process Manager environment and the PeopleSoft Enterprise environment, be sure to note the installation directories that you selected for the install. Throughout the remainder of this chapter, the Oracle BPEL Process Manager installation directory is referred to as `<BPEL_PM_HOME>`; the PeopleSoft Enterprise installation directory is referred to as `<PSHOME>`.

---

**Note.** If you are running the Oracle BPEL Process Manager in an environment that requires proxy servers, ensure that you follow the instructions to configure your Oracle BPEL Process Manager (and supporting command line environments) for a proxy environment.

---

### See Also

*PeopleSoft Enterprise PeopleTools 8.48 Installation for <your database platform>*

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker*

*Oracle JDeveloper Install Guide*

*Oracle Application Server Integration Installation Guide for Oracle BPEL Process Manager*

---

## Task 13-2: Applying Patches

While the Oracle Middle-Tier OAS installation (10.1.2.0.2) and JDeveloper installation (10.1.2.0.2) provide the core functionality necessary to integrate BPEL with the PeopleSoft system, you must also install these additional patches:

- Issues with “&” in deployed WSDL Files (4896525)
- Security and Callback Mechanism (5139817)

BPEL integration patches (whether specific to BPEL Process Manager or PeopleSoft BPEL integration) are available on the PeopleSoft Customer Connection website.

See Oracle’s PeopleSoft Customer Connection, <ftp://ftp.peoplesoft.com/outgoing/ptools/Oracle/BPEL>

Apply these patches before you activate any BPEL processes using the PeopleSoft BPEL integration. We recommend that you apply *all* available patches before you deploy the PeopleSoft BPEL processes.

---

## Task 13-3: Configuring and Tuning the Oracle BPEL Process Manager

This section discusses:

- Understanding the Oracle BPEL Process Manager Configuration and Tuning Process
- Adjusting the JTA Transaction Timeout
- Tuning the JVM
- Changing the ORABPEL Schema for PeopleSoft Worklist Integration

## Understanding the Oracle BPEL Process Manager Configuration and Tuning Process

This task primarily involves the Oracle BPEL Process Manager found as part of the OracleMiddle-Tier OAS installation. The middle-tier requires special configuration. These configurations are extensive and are not covered here.

See *Oracle Application Server Integration Installation Guide for Oracle BPEL Process Manager*.

### Task 13-3-1: Adjusting the JTA Transaction Timeout

The BPEL engine uses JTA to achieve the atomicity. By default, the transaction timeout value is set to 60000 milliseconds in the server.xml file (30000 milliseconds in the app server).

See the developer edition, <BPEL\_PM\_HOME>/system/appserver/oc4j/j2ee/home/config/server.xml.

You may experience a transaction rollback error due to timeouts, especially when the BPEL engine is under stress. The timeout can happen for many reasons. Here are two common reasons:

- Insufficient resources—not enough database connections in the connection pool, engine thread waits for 60 seconds, throws timeout error, and so on.
- Large document manipulation—database writes of very large documents may take longer than 60 seconds.

The line in the server.xml file appears as follows:

```
<transaction-config timeout="60000" />
```

A value of 300000 milliseconds is recommended.

---

**Note.** The remaining steps of the task *Configuring and Tuning the Oracle BPEL Process Manager* are primarily for the middle-tier environment. If you are using the JDeveloper BPEL Process Manager, you may skip to the task *Restarting the Instance*.

---

### Task 13-3-2: Tuning the JVM

The heap size controls how much memory the JVM can use. The initial value is 256 megabytes. The -XX:+AggressiveHeap option inspects the machine resources (size of memory and number of processors) and attempts to set various parameters for optimal long-running and memory allocation-intensive jobs.

The garbage collector optimizes collection by classifying objects by how long they live. Most of the BPEL engine objects are short lived, thus they live in the *eden* space. We recommend sizing the eden space to 60-70 percent of the total heap size. Here are the JVM command line options used:

```
-Xms1024m -Xmx1024m -Xmn614m -XX:+AggressiveHeap
```

To change the Java command line options for an OC4J instance, go to the OC4J instance homepage and perform these steps:

1. Stop the OC4J instance.
2. Drill down to the Server Properties page.
3. In the Command Line Options area of the Server Properties page, under the heading Multiple VM Configuration, set the Java options.

For example, enter the following to set the JVM initial and maximum heap sizes to 2048 megabytes; for garbage collection, set the eden space to 60 percent of heap size:

-Xms2048m -Xmx2048m -Xmn1228m

4. If you are using two or more CPUs, select the -XX:+AggressiveHeap jvm flag adjacent to the previous command.
5. Click the Apply button to apply the changes.
6. Start the OC4J instance.

### Multiple VM Configuration

---

#### Islands

Remove

Related Links

Virtual Machine Metrics

Select	Island ID	Number of Processes
<input checked="" type="radio"/>	default_island	2
<input type="radio"/>	tester	2

Add Another Row

#### Ports

RMI Ports

3101-3200

JMS Ports

3201-3300

AJP Ports

3001-3100

#### Command Line Options

Java Executable

OC4J Options

-properties

Java Options

-Xms128m -Xmx128m

#### Configuration File Paths

RMI Configuration File

./rmi.xml

JMS Configuration File

./jms.xml

Revert

Apply

Setting Java heap size for an OC4J instance using Application Server Control

You should set your maximum Java heap size so that the total memory consumed by all of the JVMs running on the system does not exceed the memory capacity of your system. If you select a value for the Java heap size that is too large for your hardware configuration, one or more of the OC4J processes within the OC4J instance may not start, causing the Oracle Enterprise Manager Application Server Control to report an error. Review the log files for the OC4J instance in the directory <BPEL\_PM\_HOME>/opmn/logs to find the error report that reads: *Could not reserve enough space for object heap.*

### Task 13-3-3: Changing the ORABPEL Schema for PeopleSoft Worklist Integration

To support the PeopleSoft BPEL Worklist integration, you must increase the size of the PROPERTIES column in the DLV\_MESSAGE table (found in the ORABPEL schema). The default column width is 1000 characters. You must alter this column and indicate that it can hold at least 2000 characters.

For example, using a SQL tool, the following SQL can be used to change the column size:

```
alter table ORABPEL.DLV_MESSAGE modify PROPERTIES varchar2(2000)
```

---

**Note.** The column width of 2000 characters is only a starting point. If your PeopleSoft Worklist integration exchanges large amounts of data, the 2000 size may not be sufficient. You can configure a maximum column size of 4000 characters.

---

---

### Task 13-4: Restarting the Instance

Reboot the machine or restart the middle-tier instance. This is required for all configuration settings to take effect. See the OracleMiddle-Tier OAS documentation on how to perform this operation.

If the JDeveloper BPEL Process Manager is used, simply stopping and restarting the BPEL Process Manager is all that is required. For example, in a Microsoft environment, select Start/Programs/<your installation name given at install time>/Oracle BPEL Process Manager 10.1.2/Stop BPEL PM Server(waiting for the Oracle BPEL Process Manager to shutdown), followed by Start/Programs/<your installation name given at install time>/Oracle BPEL Process Manager 10.1.2/Start BPEL PM Server.

Ensure that your BPEL Process Manager completes initialization before you begin the steps that follow.

---

### Task 13-5: Recording Access Information

Note the host and port information used to access your BPEL Process Manager. This information is used later when you configure the BPEL processes for deployment. The host and port information is the same as the information that you used when accessing the BPEL Console.

For example, the default URL for accessing the BPEL Console from a JDeveloper installation is:

`http://yourhostname:9700/BPELConsole`

Where the hostname is *yourhostname* and the port is *9700*. For the JDeveloper BPEL Process Manager, the port used is always 9700; however, the port used by the middle-tier product is configurable.

---

### Task 13-6: Creating and Configuring a BPEL Domain

This section discusses:

- Understanding BPEL Domain Creation and Configuration
- Creating a New BPEL Domain
- Setting the Domain auditLevel



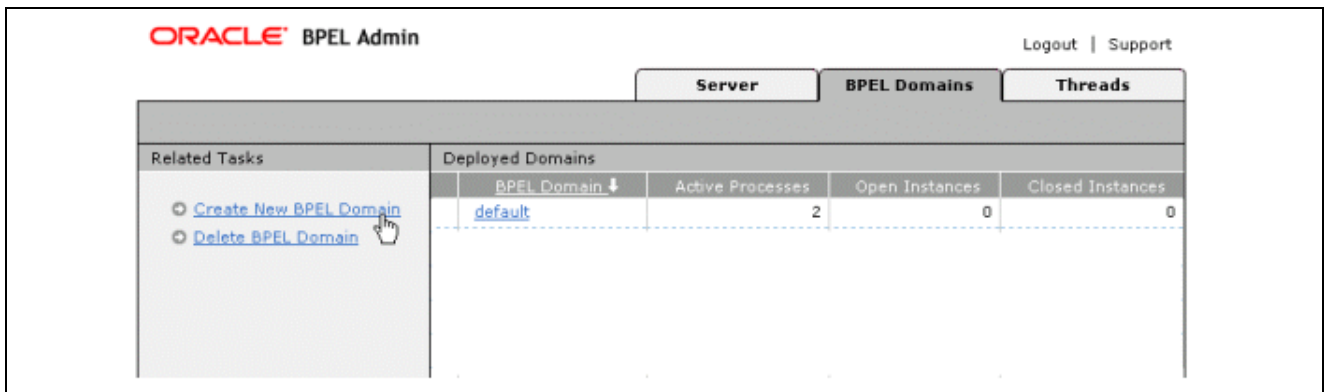
## Understanding BPEL Domain Creation and Configuration

This step involves the creation of a BPEL domain to which you will deploy the PeopleSoft CRM BPEL processes. It is possible to use the default domain that is delivered with the BPEL PM installation; however, Oracle recommends that you create a new BPEL domain for this installation.

**Note.** The BPEL Process Manager must be available to perform the following steps. You must start the BPEL Process Manager before you create the BPEL domain and remain available throughout the BPEL deployment process.

### Task 13-6-1: Creating a New BPEL Domain

Through the BPEL Administrator console (<http://yourhostname:port/BPELAdmin>), select the BPEL Domains tab and click the Create New BPEL Domain link.



BPEL Admin - BPEL Domains page

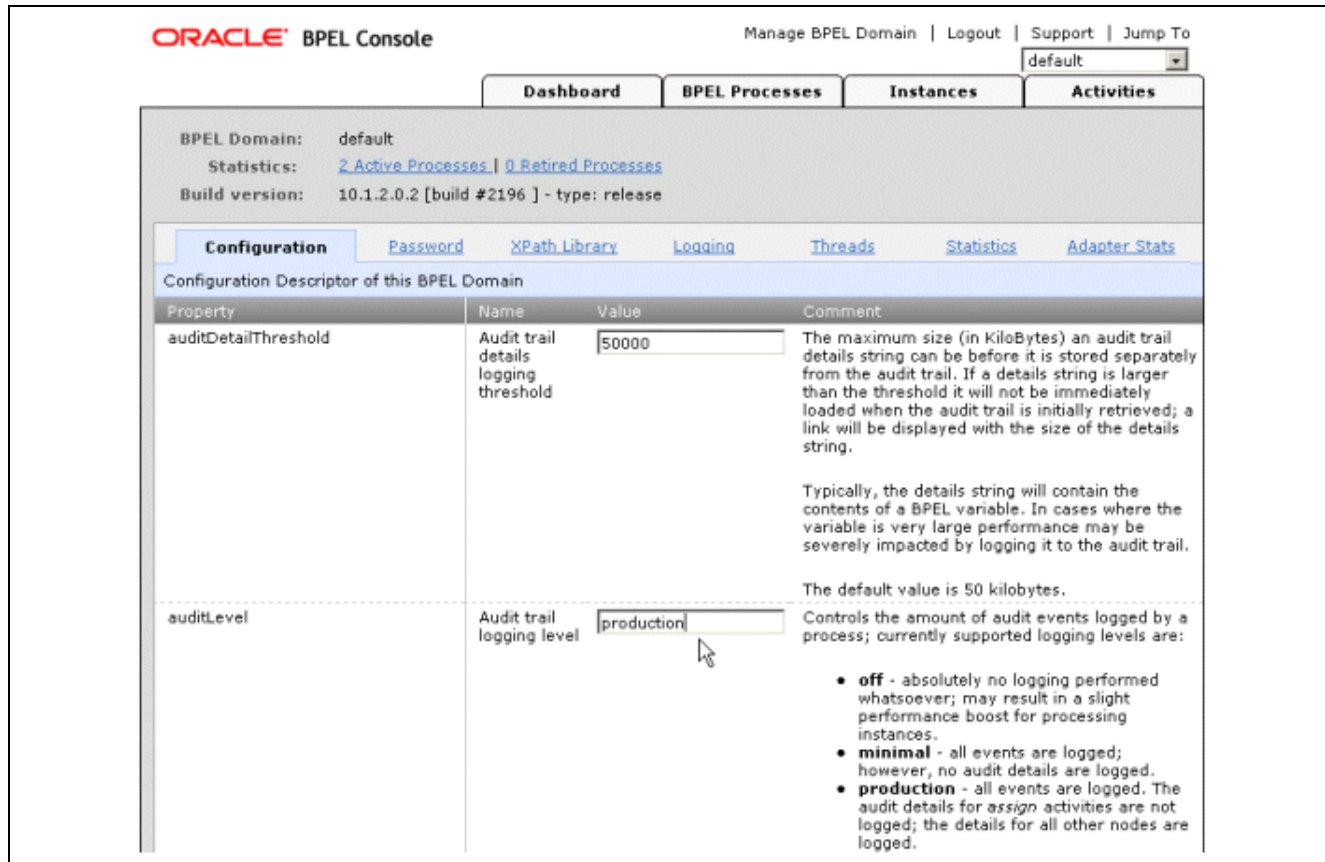
Create an installation domain and note both the Domain ID and the password that you specify (these values are used later in the PeopleSoft configuration). Use the default values populated in the other fields on the Create New BPEL Domain form. After you click the Create button, a popup window appears asking for confirmation of data. Click the OK button to confirm. Wait for the window to indicate that the creation of the new domain is complete.

**Note.** If you cannot connect to the BPEL Administrator console, the likely cause is that the BPEL Process Manager has not been started. Ensure that the BPEL Process Manager is available throughout the installation process.

### Task 13-6-2: Setting the Domain auditLevel

The auditLevel property controls the number of audit events logged by a process. This property greatly impacts the performance, due to the additional auditing events inserted into the database for a process. This audit information is only for viewing purposes from the BPEL Console to show the state of the process. This configuration property default value is *development*. Change this to *production*. With this new value, all events are logged. The audit details for <assign> activities alone are not logged.

To perform this operation, log into the domain through the BPEL Console (<http://yourhostname:port/BPELConsole>) and click the Manage BPEL Domain link (top of the page). On the Configuration tab, change the auditLevel property to *production*, and then click Apply to activate the settings.



BPEL Console - Configuration page

## Task 13-7: Configuring PeopleSoft for BPEL Integration

This section discusses:

- Understanding PeopleSoft Configurations for BPEL Integration
- Configuring a Special PeopleSoft Server Environment
- Configuring Integration Broker Gateway
- Confirming Access to Integration Broker
- Configuring Enterprise Service Setting
- Configuring the BPEL Node
- Updating the BPEL Process End Points
- Configuring the PeopleSoft Worklist Web Service
- Activating Web Services
- Configuring the PeopleSoft BPEL End User Monitor
- Restarting PeopleSoft Enterprise Environment
- Verifying Simple Access to Integration Broker

## Understanding PeopleSoft Configurations for BPEL Integration

We recommend that you configure a special application/web server environment as a dedicated environment for providing PeopleSoft CRM services. This ensures that user interaction with the PeopleSoft Pure Internet Architecture environment does not affect the performance of the service operations. However, for simple environments, it is acceptable to use the default local PeopleSoft Integration Broker Gateway and the application servers used by the PeopleSoft Pure Internet Architecture.

---

**Note.** The remainder of the installation steps requires the PeopleSoft Pure Internet Architecture environment to be available. Administrators must be able to log into the environment to configure the PeopleSoft Integration Broker. Also, the deployment process performed on the BPEL Process Manager requires access to the PeopleSoft service details that are accessed through the PeopleSoft Integration Broker. Ensure that the PeopleSoft environment is completely available throughout the remainder of the installation.

---

### Task 13-7-1: Configuring a Special PeopleSoft Server Environment

In this step, you configure a special server (web and application server) environment to provide PeopleSoft services.

---

**Note.** You can skip this step if the existing PeopleSoft environment used by the PeopleSoft Pure Internet Architecture users is to be used by service operations.

---

#### See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker.*

### Task 13-7-2: Configuring Integration Broker Gateway

The delivered BPEL processes expect the application server (where the PeopleSoft services are executed) to be the default application server for the Integration Broker Gateway associated with the URL (used for Service Operations). To configure the default application server, select PeopleTools, Integration Broker, Configuration, Gateways.

If creating a special application server for service operations, create a new gateway with the hostname/port URL configured as part of the previous task. If you are using a single application server environment, confirm the local gateway URL for proper configuration.

The screenshot shows the 'Gateways' configuration page. It includes a 'Gateway ID' field with the value 'BPELGW'. Below this are two unchecked checkboxes: 'Local Gateway' and 'Load Balancer'. The 'URL' field contains the text 'http://rtas069.peoplesoft.com:8000/PSIGW/PeopleSoftListeningConnec'. To the right of the URL field is a yellow button labeled 'Ping Gateway'. At the bottom left, there is a blue link labeled 'Gateway Setup Properties'.

Gateways page

Go to the Gateway Setup Properties (follow the instructions on the login page) and configure the default application server for the application server that you are using:

**PeopleSoft Node Configuration**

URL: `http://rtas069.peoplesoft.com:8300/PSIGW/PeopleSoftListeningConnector`

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release
<code>//&lt;machine name&gt;:&lt;jolt port&gt;</code>	<code>&lt;database use&gt;</code>		<code>&lt;peopletools ri</code>

PeopleSoft Node Configuration page

See the PeopleSoft guide for configuring the Integration Broker to set up a gateway.

### Task 13-7-3: Confirming Access to Integration Broker

After you configure the environment, you can *ping* the PeopleSoft Integration Broker gateway by using the host/port information for the environments application server. From a browser, enter the following type of URL:

*`http://yourhostname:port/PSIGW/PeopleSoftListeningConnector`*

If you see the following output in the browser, the PeopleSoft Integration Broker is available for further configuration:

## PeopleSoft Integration Gateway

PeopleSoft Listening Connector  
Tools Version : 8.48-804-R2  
Status: ACTIVE

PeopleSoft Integration Gateway status

**Note.** Remember the hostname and port information for your PeopleSoft Integration Broker. You will use this information later to configure the BPEL processes for deployment.

### Task 13-7-4: Configuring Enterprise Service Setting

In this step, change the default service configurations by selecting PeopleTools, Integration Broker, Configuration, Service Configuration.

On the Service Configuration page, change the following fields:

- Service Namespace to *`urn:oracle.enterprise.crm.service`*.
- Schema Namespace to *`urn:oracle.enterprise.crm.data`*.
- Target Location to *`http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector`*.

**Service Configuration** | UDDI Configuration | Restricted Services

\*Service Namespace: `urn:oracle.enterprise.crm.service`

\*Schema Namespace: `urn:oracle.enterprise.crm.data`

\*Target Location: `http://rtas069.peoplesoft.com:8000/PSIGW/PeopleSoftServiceListeningConnector`

Service Configuration page

**Note.** The Target Location URL uses PeopleSoftServiceListeningConnector contrary to the PeopleSoftListeningConnector that was used as part of the PeopleSoft Integration Broker Setup.

## Task 13-7-5: Configuring the BPEL Node

The PeopleSoft Integration Broker node, BPEL, is used to communicate to the BPEL engine. You must properly configure this node to point to the BPEL Process Manager. To do this, select PeopleTools, Integration Broker, Integration Setup, Nodes and open the BPE node. The Nodes page appears. Click the Properties link. The Properties page appears. Enter the following information:

- BPEL Console URL (used earlier to configure the domain)
- BPEL Domain (target deployment domain)
- BPEL Domain Password



**Node Properties**

Node Name: BPEL

Properties

	Name Type	Property Name	Value	Comment
1	Category	BPELCONSOL	http://myBPELPM:9700/BPELConsole	
2	Category	BPELDOMAIN	CRMDOMAIN	
3	Category	BPELDOMAINI	bpe1	

OK Cancel

Node Properties page

## Task 13-7-6: Updating the BPEL Process End Points

The delivered services have end point addresses that use the tokens <host:id> and <domain> in the URL. You must replace these with the actual end point for the BPEL Process Manager environment that you are configuring. A special convenience utility is available for replacing all of the service routings for the designated node to point to the environment information configured in the previous step.

To configure the BPEL process end point addresses, select Set Up CRM, Common Definitions, Business Process, Infrastructure, Update End Point Addresses. The Update End Points page appears. Enter *BPEL* in the Node field and click Continue (after reviewing the BPEL Process Manager hostname and port information in the Base URL as well as the BPEL domain value in the Domain field).



**Update End Points**

\*BPEL Node: BPEL

Base URL: <http://myBPELPM.peoplesoft.com:9700>

Domain: CRMDOMAIN

☐ Replace All (Untokenized Messages also)

Continue

Update End Points page

If you make a mistake or your environment changes and you need to update all service routings associated with the BPEL node, select the Replace All check box prior to clicking Continue to update all message routings, regardless of whether these message routings are tokenized (as mentioned earlier).

## Task 13-7-7: Configuring the PeopleSoft Worklist Web Service

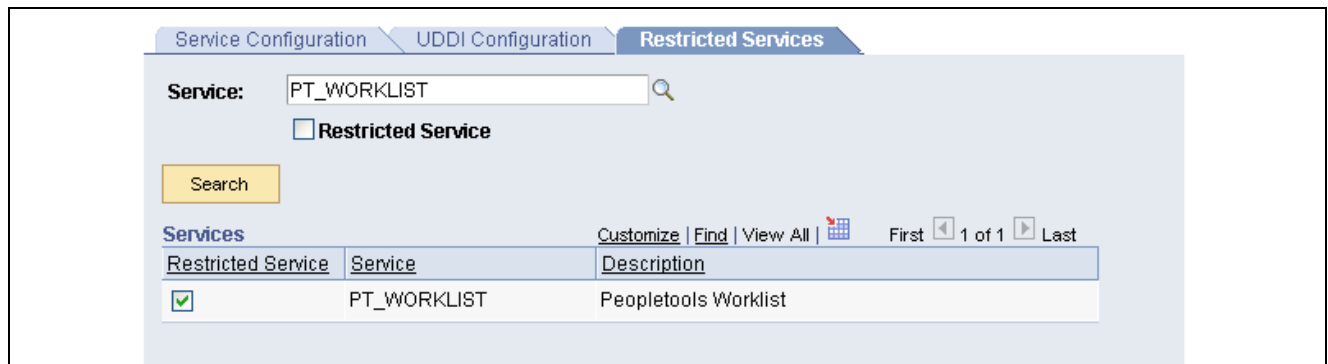
To enable PeopleSoft Worklist web service to pass BPEL process-specific parameters when creating a new PeopleSoft Worklist in the PeopleSoft application and to send a PeopleSoft Worklist outcome response back to the BPEL process that created the PeopleSoft Worklist, you must include the PeopleSoft CRM part messages in the PeopleSoft Worklist web service operation message containers. Including these messages is a required configuration for a new installation. Including these messages are also required whenever the modified version of the PeopleSoft Worklist service container messages are delivered through a PeopleSoft PeopleTools upgrade.

After you include the correct PeopleSoft CRM part messages in the corresponding PeopleSoft PeopleTools-delivered web service operation containers, you must regenerate the schema.

To include PeopleSoft CRM part messages in the PeopleSoft Worklist web service operation message container:

1. Remove the restriction on PT\_WORKLIST web service to enable updating of its data.

PT\_WORKLIST web service is delivered restricted, preventing users from updating its configuration setting. To update its content, select PeopleTools, Integration Broker, Configuration, Service Configuration, and then select the Restricted Service tab. On the Restricted Services page, enter *PT\_WORKLIST* then click Search. Clear the Restricted Service check box for the PT\_WORKLIST web service, and save the page. Return to the Service Configuration page and verify that the service system status is set to *Development*.



Restricted Services page

2. Add the RBB\_CREATE\_WORKLIST message part to the PT\_WL\_CREATE\_REQUEST\_CONT message container.

**Note.** If the RBB\_CREATE\_WORKLIST message part is already present in PT\_WL\_CREATE\_REQUEST\_CONT, you may skip this specific step.

- a. Generate the schema of the part message to add a part message to the container message.

To generate the schema of the part message, select PeopleTools, Integration Broker, Integration Setup, Messages. Search for RBB\_CREATE\_WORKLIST. Go to the Schema page and click the Build Schema button. Confirm the namespace by clicking the OK button; the system generates the message schema.



Schema page

- b. Select PeopleTools, Integration Broker, Integration Setup, Messages. Search for the PT\_WL\_CREATE\_REQUEST\_CONT message container. Click the Add Parts link and select the *RBB\_CREATE\_WORKLIST* message and message version number. Designate a sequence number that is greater than the one assigned to PT\_WL\_CREATE\_REQUEST\_CONT message, along with the parameters shown in the following example. Save the page to generate the schema of the reconfigured message container.

Message Name	Message Version	Sequence	Minimum Occurs	Maximum Occurs	*Unbound Maximum
PT_WL_CREATE_REQUEST	v1	1	1	1	N
RBB_CREATE_WORKLIST	v1	2	1	1	N

RBB\_CREATE\_WORKLIST part message in the PT\_WL\_CREATE\_REQUEST\_CONT container message

3. Register the CRM handler, RBBHandler, to the CREATE\_WORKLIST\_ITEM service operation.

To use the PeopleSoft CRM handler to process web service requests for creating the PeopleSoft Worklist, you must disable the PeopleSoft PeopleTools NOTIFY handler and register the PeopleSoft CRM handler using the following steps:

---

**Note.** If the RBBHandler is already present with an Active status, and the PeopleSoft PeopleTools NOTIFY handler is inactive, you can skip this specific step.

---

- a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for PT\_WORKLIST.
- b. Click the CREATE\_WORKLIST\_ITEM operation link to open the operation details.
- c. Go to the Handlers page.
- d. Set the status of the PeopleSoft PeopleTools NOTIFY handler to *Inactive* and add the PeopleSoft CRM-specific handler, RBBHandler, with a status of *Active*. Note that the ACK handler is delivered by PeopleSoft PeopleTools and should be active at all times.
- e. Click Save to save the page.

**General** **Handlers** **Routings**

**Service Operation:** CREATE\_WORKLIST\_ITEM  
**Default Version:** V1  
**Operation Type:** Asynch Request/Response

**Handlers** Customize | Find | View All | First 1-3 of 3 Last

*Name	*Type	*Implementation	*Status		
ACK	OnReceive	App Class	Active	Details	+ -
NOTIFY	OnNotify	App Class	Inactive	Details	+ -
RBBHandler	OnNotify	App Class	Active	Details	+ -

Handlers page

- f. Click the Details link in the RBBHandler row, enter the action detail parameters as shown in this example, and then click Save to save the page.

**Action Details**

**Handler Name:** RBBHandler  
**Handler Type:** OnNotify  
**Description:** RBB Worklist Handler  
**Comments:**  
**Handler Owner:** RBB

**Application Class**

**\*Package Name:** RBB\_WS\_WORKLIST  
**\*Path:** Business  
**Class ID:** NotificationHandler  
**Method:** OnNotify

OK Cancel

Action Details page

4. Add the RBB\_OUTCOME\_RESPONSE message part to the PT\_WL\_CREATE\_RESPONSE\_CONT message container.

**Note.** If the RBB\_OUTCOME\_RESPONSE message part is already present in PT\_WL\_CREATE\_RESPONSE\_CONT, you can skip this specific step.

- a. Generate the schema for the RBB\_OUTCOME\_RESPONSE part message, select PeopleTools, Integration Broker, Integration Setup, Messages, and search for RBB\_OUTCOME\_RESPONSE.

Go to the Schema page. Click the Build Schema button. Click the OK button to confirm the namespace; the system generates the message schema.



Message Definition Schema

**Message:** RBB\_OUTCOME\_RESPONSE **Updated:** 06/19/2006 10:42:12AM

**Version:** v1

**Namespace:** http://xmlns.oracle.com/Enterprise/Tools/schemas/RBB\_OUTCOME\_RES

Build Schema

Schema page

- b. Select PeopleTools, Integration Broker, Integration Setup, Messages and search for the PT\_WL\_CREATE\_RESPONSE\_CONT message container.

Click the Add Parts link and select the *RBB\_OUTCOME\_RESPONSE* message. Designate a sequence number that is greater than the one assigned to the PT\_WL\_CREATE\_RESPOSNE\_CONT message and enter the parameters shown in the following example. Save the page to regenerate the schema of the re-configured message container.

Service Operation References

Add Parts

Parts

Customize Find View All

First 1-2 of 2 Last

Message Name	Message Version	Sequence	Minimum Occurs	Maximum Occurs	*Unbound Maximum
PT_WL_CREATE_RESPONSE	v1	1	1	1	N
RBB_OUTCOME_RESPONSE	v1	2	1	1	N

Save Save As

RBB\_OUTCOME\_RESPONSE part message in the PT\_WL\_CREATE\_RESPONSE\_CONT container message

5. Regenerate the WSDL of the PT\_WORKLIST web service.

**Note.** If you skipped Steps 2 and 4 in this section, skip this specific step (list step #5) and continue.

- Select PeopleTools, Integration Broker, Web Services, Provide Web Services, and enter *PT\_WORKLIST* for the service name, click Search, and then click NEXT button.
- Select both CREATE\_WORKLIST\_ITEM.v1 and GETWLINSTANCE.v1 Service operations and click NEXT.
- Review the new WSDL as necessary; and click the NEXT button to publish the WSDL.
- Click the Finish button to publish the new WSDL into the PeopleSoft WSDL Repository.



Generate SOAP template

- e. Generate the SOAP template by clicking the Generate SOAP Template button.
  6. Change the Service System Status value to *Production* and restrict the PT\_WORKLIST web service to prevent unauthorized updates.
- After you add PeopleSoft CRM part messages to the PeopleSoft PeopleTools worklist message containers, and their corresponding schema and WSDLs are generated correctly, restrict the users from updating the service data by restricting access to the PT\_WORKLIST web service. To restrict access, select PeopleTools, Integration Broker, Configuration, and then select the Restricted Services tab. Select the Restricted Service check box, and then save the page.

## Task 13-7-8: Activating Web Services

### Understanding Web Service Activation

This section involves activating the required web services to support the BPEL process deployment and runtime operations. There are three categories of web services that you must activate for the complete BPEL integration: PeopleSoft PeopleTools, BPEL Infrastructure, and application-specific. You must activate PeopleSoft PeopleTools and BPEL Infrastructure web services during this installation step; you can defer application-specific web service activation.

To activate the web services mentioned in this section:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Enter the service operation that you want to activate in the Service Operation field and click Search.
3. Select the service operation from the results area.

4. On the General page that appears, select the Active field.

---

**Note.** For asynchronous operations, remember the queues found in the Message Information section so that you can place these queues in a Running state in a later step.

---

5. On the Handlers page, ensure that any handler listed is set to *Active* (with the exception of the CREATE\_WORKLIST\_ITEM service operation, covered in a previous task).
6. On the Routings page, ensure that the listed routing is active (if multiple routings exist, only one should be active).

If the routing for the service operation does not have a status of *Active* select the routing to be activated (use the first routing if multiple routings exist) and click the Activate Selected Routings button.

7. Click Save to store your changes.
8. For asynchronous service operations only, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status.
9. On the Queue Status page, ensure that the queue that the service operation uses is in *Running* status.

If the queue is not running, click the corresponding Run button.

As mentioned earlier, you can find the name of the queue that an asynchronous service operation uses on the General page for that service operation.

---

**Note.** As a reminder, ensure that the handlers and routings are activated for the service operations. Activating the service operation does not automatically activate the corresponding handlers or routings. If an operation, handler, routing or queue is already active, no action is required for that item.

---

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services."

### Confirming PeopleSoft PeopleTools Web Service Availability

For basic BPEL process deployment and typical BPEL process operations, you must activate the following PeopleSoft PeopleTools Service Operations (and their corresponding routings):

- CREATE\_WORKLIST\_ITEM
- GETROUTINGS
- GETSCHEMA
- GETWLINSTANCE
- GETWSDL
- GETWSIL
- GETXSLT
- SAVEXSLT

Ensure that the following corresponding Integration Broker Queues are in a *Running* state:

- IB\_CHNL
- IB\_GENERIC
- WORKLIST\_CHNL
- WSDL\_QUEUE

To verify whether a queue is running:

- Select PeopleTools, Integration Broker, Service Operations Monitor, Queue Status.
- Click the Find link in the Queues grid.
- Enter the *Queue Name* in the Search Box and click the OK button.
- Ensure that the Status column shows the Queue status as *Running*. If the status is *Paused*, click the Run button, next to the Status field.

## Activating BPEL Infrastructure Web Services

Some common web services are used across the applications that are considered part of the BPEL infrastructure. Activate the following service operations:

- RBB\_HOUSEKEEPING\_SO
- RBBSYNCPROCESS
- INITIATESAMPLEWORKLIST
- INITIATESTRUCTUREDWORKLIST
- INITIATEUNSTRUCTUREDWORKLIST
- INITSAMPLESTRUCTUREDWORKLIST

The *RBB\_QUEUE* queue must also be set to a *Running* state. If the Queue is *Paused*, follow the steps previously discussed to start the queue.

## Activating Application-Specific Web Services

You can activate the web services for your particular applications. Activation of these web services is not required for the BPEL integration installation. You can perform these activations after your environment is configured. Refer to your application-specific PeopleSoft PeopleBooks for the list of web service operations that you must activate.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “*Business Object Delivered Web Services*.”

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “*Order Capture Delivered Business Processes and Web Services*.”

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “*Delivered Business Processes and Web Services*.”

See *PeopleSoft Enterprise Sales 9 PeopleBook*, “*Sales Delivered Business Processes and Web Services*.”

See *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “*Delivered Web Service and Service Operations*.”

See *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, “*Delivered Web Service and Service Operations*.”

## Task 13-7-9: Configuring the PeopleSoft BPEL End User Monitor

This section involves the steps to enable the PeopleSoft BPEL End User Monitor, as well as some other minor features. The steps include configuring JNDI access to the BPEL Process Manager, as well as copying over BPEL supporting java classes.

1. Configure JNDI access.

JNDI access is required to the BPEL Process Manager to support the PeopleSoft BPEL End User Monitor feature (and some other minor features). The information for JNDI was part of the configuration performed when setting up the BPEL Process Manager. Given that information, we now configure PeopleSoft to access the BPEL Process Manager.

2. Select Set Up CRM, Common Definitions, Business Process, Infrastructure, JNDI Details.

*BPEL Node	*ORMI URL	*ORMI Port	*Username	*Password
BPEL	ormi://myBPELPM.peoplesoft.com/orabpel	23791	admin	*****

JNDI Details page

3. Configure the BPEL node JNDI access by entering the following information:

- BPEL Node: Enter *BPEL*.
- ORMI URL: Use *ormi://<host>/orabpel* format.  
Note that no port information is specified as previously performed.
- ORMI Port: Use the value *23791*, unless you have changed the ORMI port during the middle-tier installation.
- Username and Password: Use the username/password information for JNDI (not the BPEL domain). The defaults are *admin* and *welcome*, respectively.

4. After you finish entering the data, click Save to store your changes.
5. Copy BPEL support files.

You must copy a number of files from the BPEL Process Manager environment into the PeopleSoft environment. These files are not included as part of the PeopleSoft installation. You should copy them not only during the initial installation of the BPEL integration, but also any time that you apply updates to the BPEL Process Manager environment. This ensures that the most current BPEL files are used.

The following table lists the files that should be copied from the BPEL Process Manager environment into the <PSHOME>/class directory.

Filename	Directory
bpm-infra.jar bpm-services.jar dms.jar orabpel.jar orabpel-boot.jar orabpel-common.jar orabpel-thirdparty.jar xmlparserv2.jar **	<BPEL_PM_HOME>/integration/orabpel/lib
activation.jar ** bcel.jar ejb.jar jaas.jar javax77.jar jdbc.jar jms.jar jmxri.jar jta.jar mail.jar ** servlet.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/j2ee/home/lib (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/j2ee/home/lib (for middle-tier)
oc4jclient.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/j2ee/home (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/j2ee/home (for middle-tier)
classes12dms.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/jdbc/lib (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/jdbc/lib (for middle-tier)
ojdl.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/diagnostics/lib (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/diagnostics/lib (for middle-tier)
optic.jar	<BPEL_PM_HOME>/integration/jdev/opmn/lib (for jdeveloper may not be available)  <i>or</i> <BPEL_PM_HOME>/opmn/lib (for middle-tier)

**\*\*** Indicates jar files in `<PS_HOME>/class` with same name as PeopleSoft jar files that you should *not* overwrite.

---

**Warning!** Do not overwrite the PeopleSoft jar files in the `<PSHOME>/class` directory with the BPEL Process Manager jar files.

---

## Task 13-7-10: Restarting PeopleSoft Enterprise Environment

After the configuration changes complete, restart the PeopleSoft Enterprise environment for the settings to take effect. Restart all facilities of the PeopleSoft environment (that is, the application server, web server, and PeopleSoft Process Scheduler). The configuration on the PeopleSoft side is now complete.

## Task 13-7-11: Verifying Simple Access to Integration Broker

After you restart the PeopleSoft environment, you can test to access a service's Web Service Definition Language (WSDL) to see if the basic information required by the BPEL deployment tasks is available. From a web browser on the BPEL Process Manager machine, enter the following URL address:

`http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector/PT_WORKLIST.1.wsdl`

The result should display an XML document with this top-level tag element :`<wsdl:definitions>`. Any other result means that the PeopleSoft system is not correctly configured. Verify that your PeopleSoft Integration Broker settings are correct and that all components of the PeopleSoft system (application servers and web servers) are available.

---

## Task 13-8: Deploying PeopleSoft CRM BPEL Processes

This section discusses:

- Understanding PeopleSoft CRM BPEL Process Deployment
- Copying BPEL Process Files
- Configuring BPEL Process Files for Deployment
- Deploying All BPEL Processes

## Understanding PeopleSoft CRM BPEL Process Deployment

This section discusses the initial deployment of all PeopleSoft CRM BPEL processes onto the BPEL Process Manager.

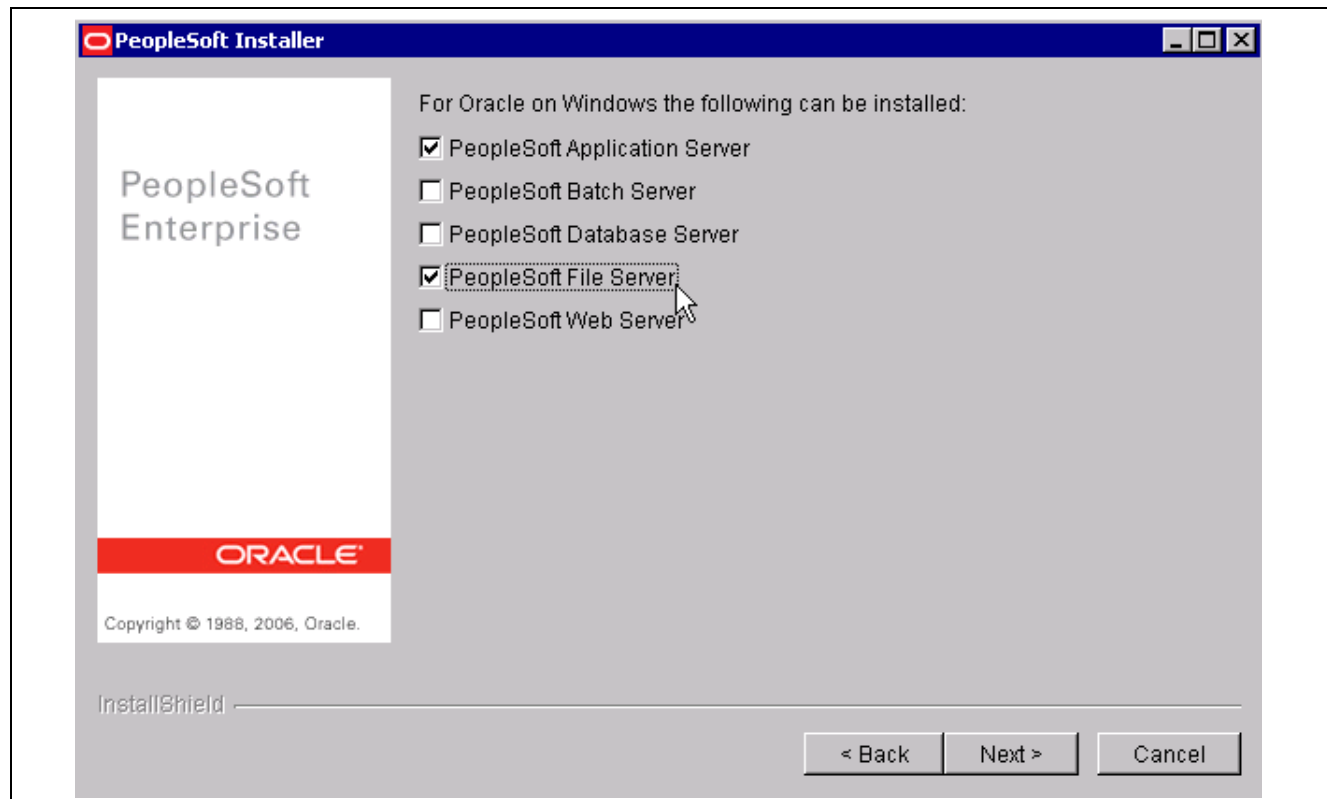
---

**Note.** You cannot complete this step until you have completed all previous tasks and *both* the BPEL Process Manager and the PeopleSoft Integration Broker are available.

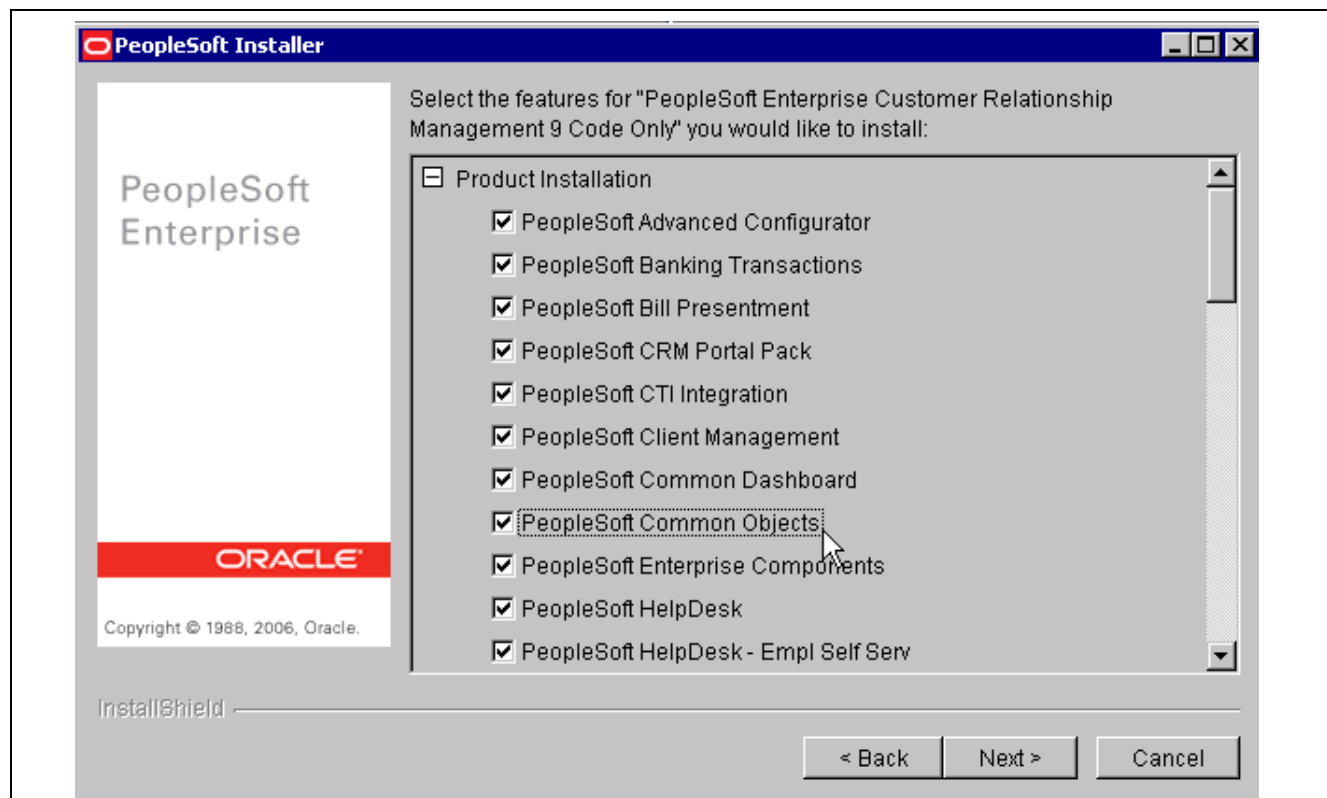
---

## Task 13-8-1: Copying BPEL Process Files

In the PeopleSoft installation directory (PSHOME), there should be a directory called `bpel`. The `bpel` directory is created during the PeopleSoft installation when you select the following installation options: PeopleSoft File Server and PeopleSoft Common Object, as shown in the following examples:



PeopleSoft Installer: the PeopleSoft File Server option must be selected



PeopleSoft Installer: the PeopleSoft Common Objects option must be selected



The `bpel` directory contains the BPEL process source files, as well as supporting files to be used to deploy the BPEL processes that are your target BPEL Process Manager machine. You must copy these files over to the BPEL Process Manager. On your BPEL Process Manager machine, create a new directory in `<BPEL_PM_HOME>/integration/orabpel` named `peoplesoft`. Now, copy the *contents* of the `<PSHOME>/bpel` directory over to the `<BPEL_PM_HOME>/integration/orabpel/peoplesoft` directory on your target BPEL Process Manager machine. Once the copy is completed, the contents of the `peoplesoft` directory should be the same as the contents of the `bpel` directory.

The remainder of the steps in this section are performed on the BPEL Process Manager machine.

## Task 13-8-2: Configuring BPEL Process Files for Deployment

### Edit `install.properties`

This step involves editing the `install.properties` file, located in `<BPEL_PM_HOME>/integration/orabpel/peoplesoft`. This file is used to create a set of deployable files for the environment that you have created. The delivered file appears as follows:

```
install.ps-host=<Integration Broker Host>
install.bpel-host=<your bpelpm machine>
install.bpel-port=80
install.bpel-domain=default
```

Specify the following information:

- `install.ps-host`: This is the hostname and port (if specified) used to access the PeopleSoft Integration Broker.
- `install.bpel-host`: BPEL Process Manager hostname only (current machine name).
- `install.bpel-port`: BPEL Process Manager port only (default for JDeveloper is 9700).
- `install.bpel-domain`: BPEL Domain created for deployment of PeopleSoft CRM processes.

### Create Deployable BPEL Files

This step creates a new folder structure to be used for the actual BPEL deployment. These files have the correct end point addresses for your configured environment entered in the `install.properties` file.

To perform these steps, first open the Oracle BPEL Process Manager Developer Prompt. This special prompt window has many environmental properties already configured. See your BPEL Process Manager documentation on how to start the Developer Prompt. For example, on a Microsoft environment, select Start, Programs, `<your installation name given at install time>`, Oracle BPEL Process Manager 10.1.2, Developer Prompt. A command window appears.

In the Developer Prompt, change the directory to the `<BPEL_PM_HOME>/integration/orabpel/peoplesoft` directory. Enter the following command:

```
obant install
```

After completion a new directory, `crm_<date-time>`, is created. The directory name is listed in the output produced by the previous command.

## Task 13-8-3: Deploying All BPEL Processes

As the final step, deploy the BPEL processes on to the BPEL domain that you previously created. To do this, change the directory into the newly created `crm_<date-time>` directory, and run the following command in the Developer Prompt window:

```
obant
```

At the conclusion of this command, all processes should be deployed into the target domain. If errors occur during deployment, confirm that both the BPEL Process Manager and PeopleSoft systems are available. You can try to deploy a single process by entering the following code, where *processName* is the name of a directory found in the `crm_<date-time>` directory:

```
obant processName
```

If the problem persists, verify that both systems are available and also have no errors. You may need to restart the systems.

## CHAPTER 14

# Installing PeopleSoft Natural Language Processor (Banter)

This chapter discusses:

- Understanding the PeopleSoft Natural Language Processor Installation
- Downloading the PeopleSoft NLP Web Service
- Setting Up the Virtual Web Site
- Validating the .NET Runtime Environment
- Granting Access to Banter Server
- Test Web Service from Browser
- Setting Up the FTP Site
- Configuring PeopleSoft Web Service Application Environment

Natural Language processor is used by Multichannel Framework and Call Center products in CRM.

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## Understanding the PeopleSoft Natural Language Processor Installation

This chapter provides instructions for the installation of Oracle's PeopleSoft Enterprise Natural Language Processor (NLP) and related components.

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**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on Oracle's PeopleSoft Customer Connection website to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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## Task 14-1: Downloading the PeopleSoft NLP Web Service

To download the PeopleSoft Natural Language Processor (NLP) web service:

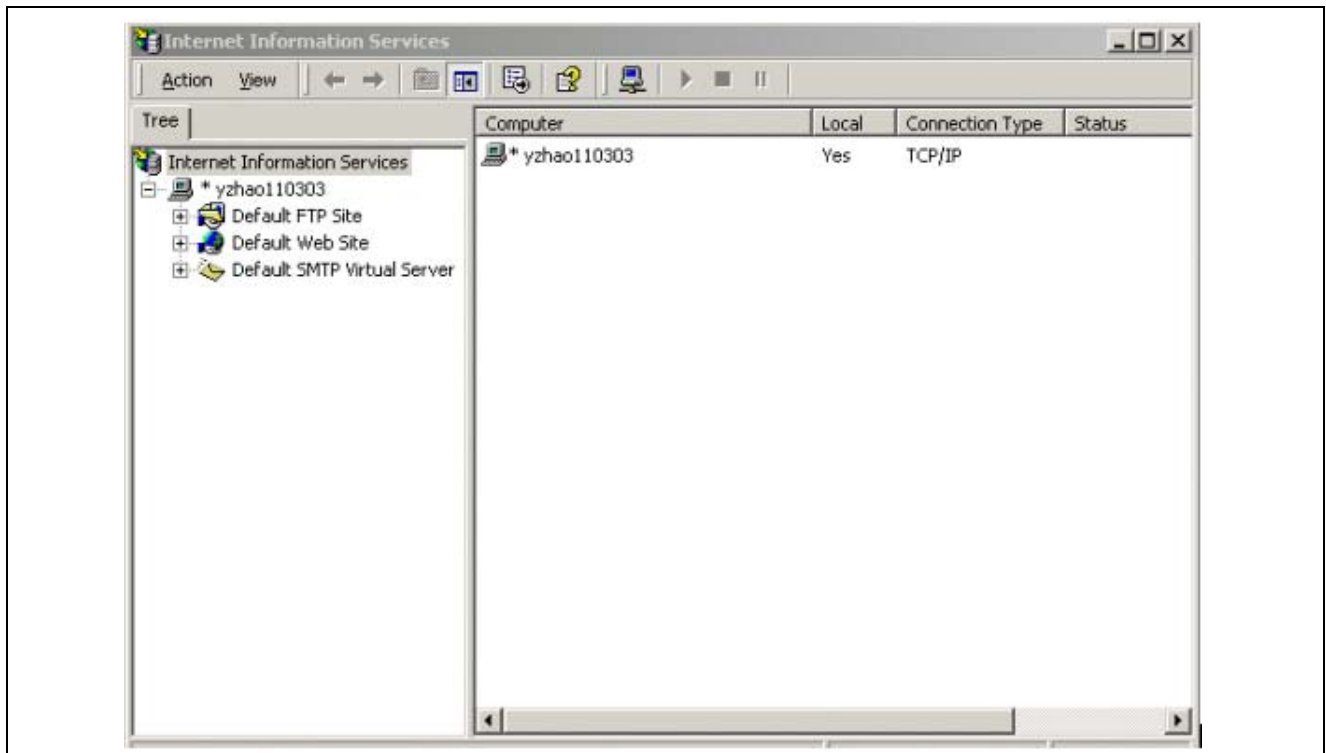
1. Copy the delivered PeopleSoft web service ZIP file into a local temporary directory.
2. Run the self-executing zip file and extract all files into the installation directory of the local machine. We recommend that you save these files on the local machine and not on a network directory.
3. Using the directory explorer, find the directory where CRM\_UAD\_PTUPGRADE project file is located.

4. In the Select Project from the List Below region, click the CRM\_UAD\_PTUPGRADE entry, and then click the Select button.
5. In the Copy From File window, click the Copy button to copy project file objects into the target database.

## Task 14-2: Setting Up the Virtual Web Site

To set up the virtual web site:

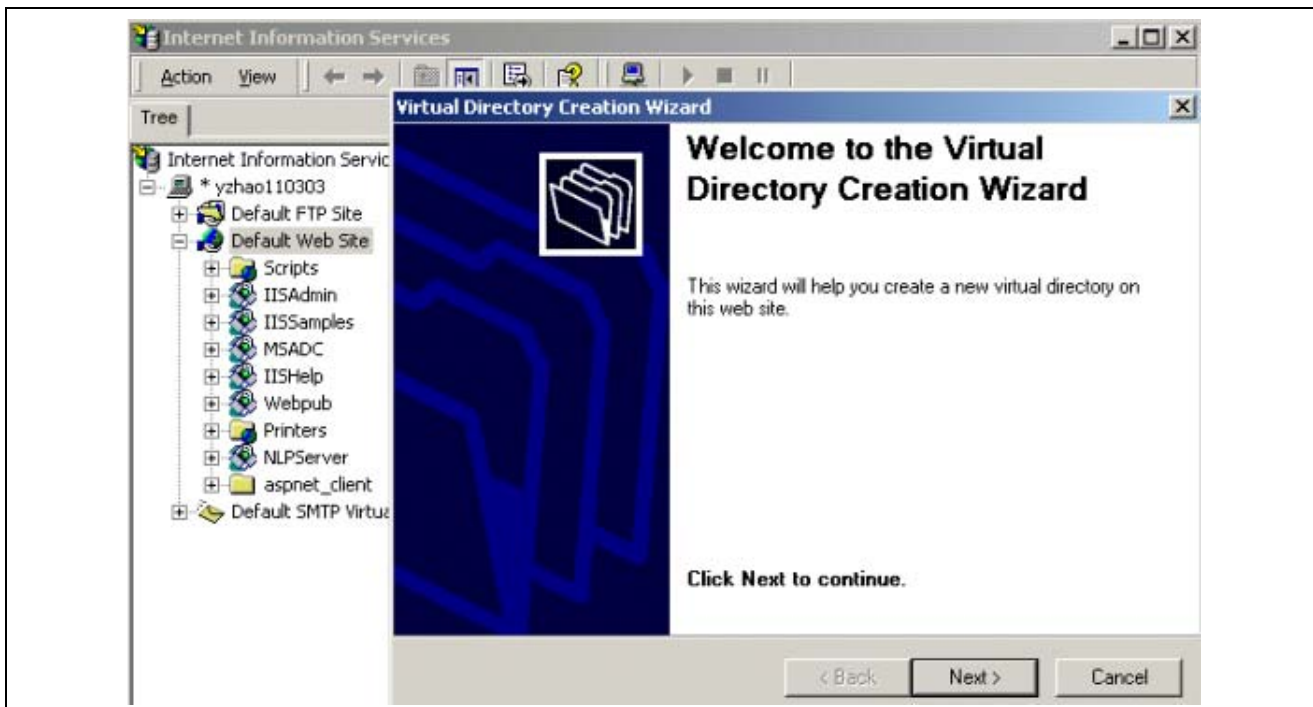
1. From the Microsoft Windows desktop, select Control Panel, Administrative Tools, Internet Service Manager. The Internet Service Manager window displays:



Internet Service Manager window

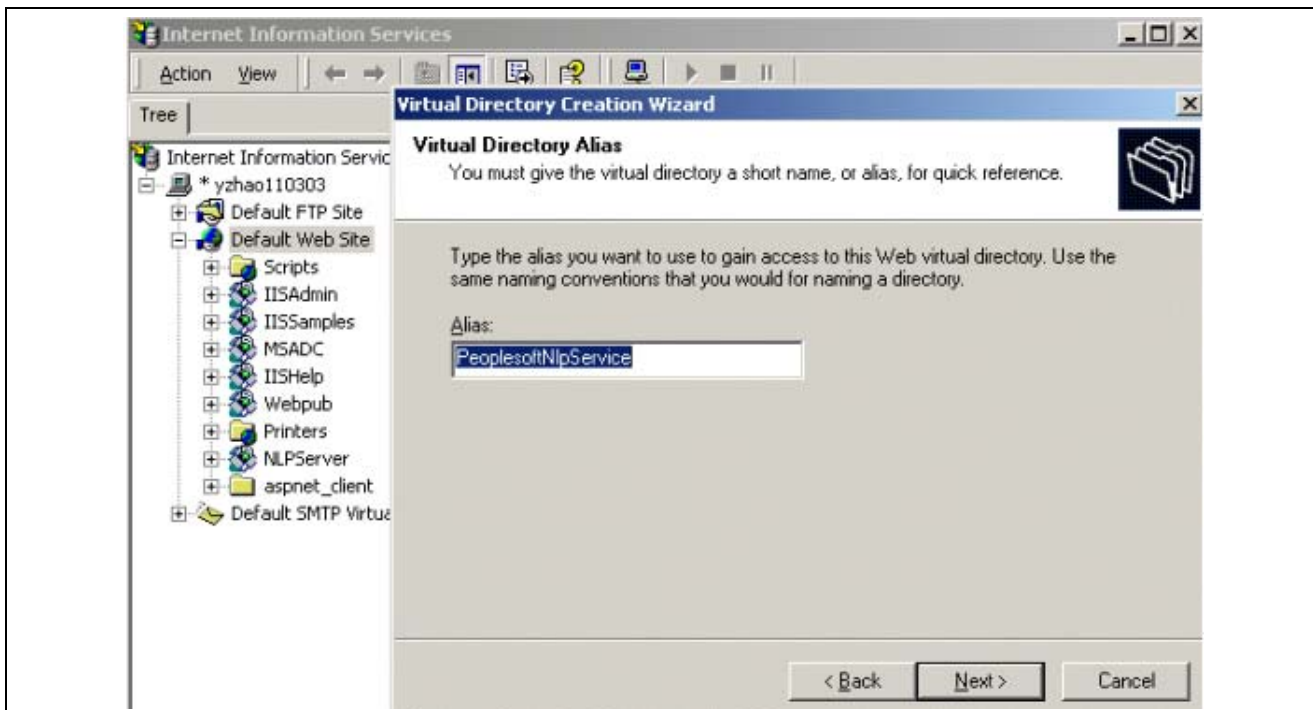
2. In the left pane you will see *Default Web Site* or *Customized Web Site Name* that your administrator assigned. Select that item. From the menu click Action and select new menu item and then Virtual Directory.

The Virtual Directory Creation Wizard window appears:



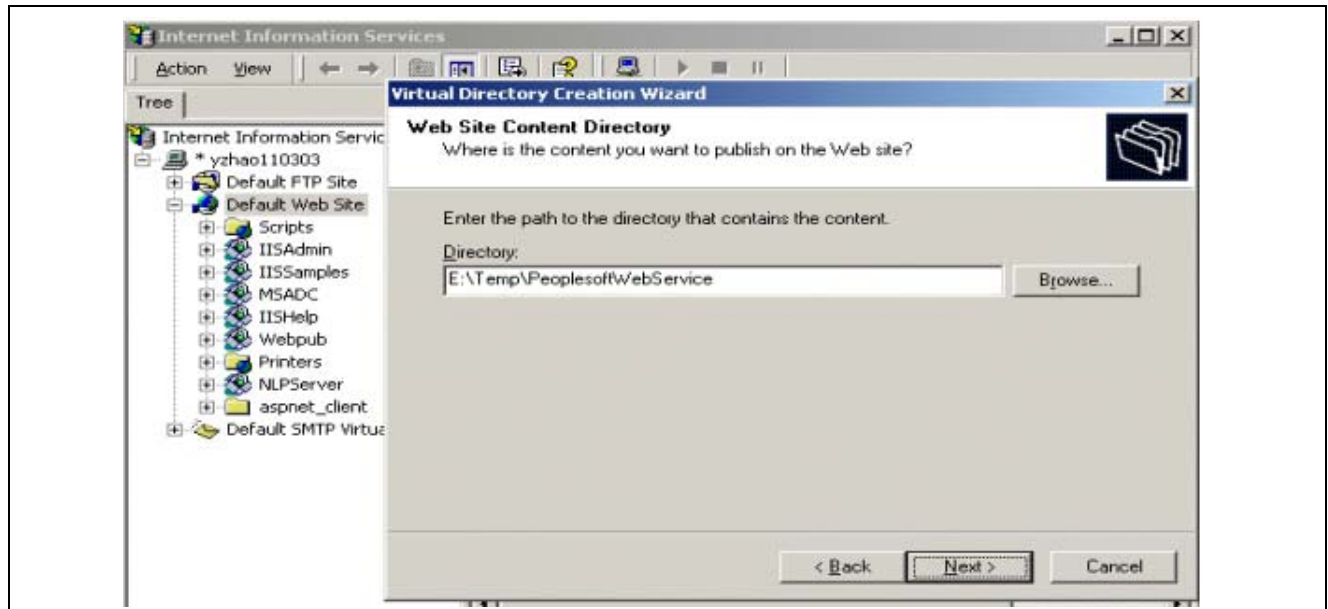
Virtual Directory Creation Wizard window

3. You must specify the unique alias name for your virtual directory. For example, if you assign PeoplesoftWebService as the name, then when you access this virtual web application, you must enter *http://machinename:port/PeoplesoftWebService/* in the Internet Explorer (IE) browser. The browser loads the application under the installation directory that you just specified.



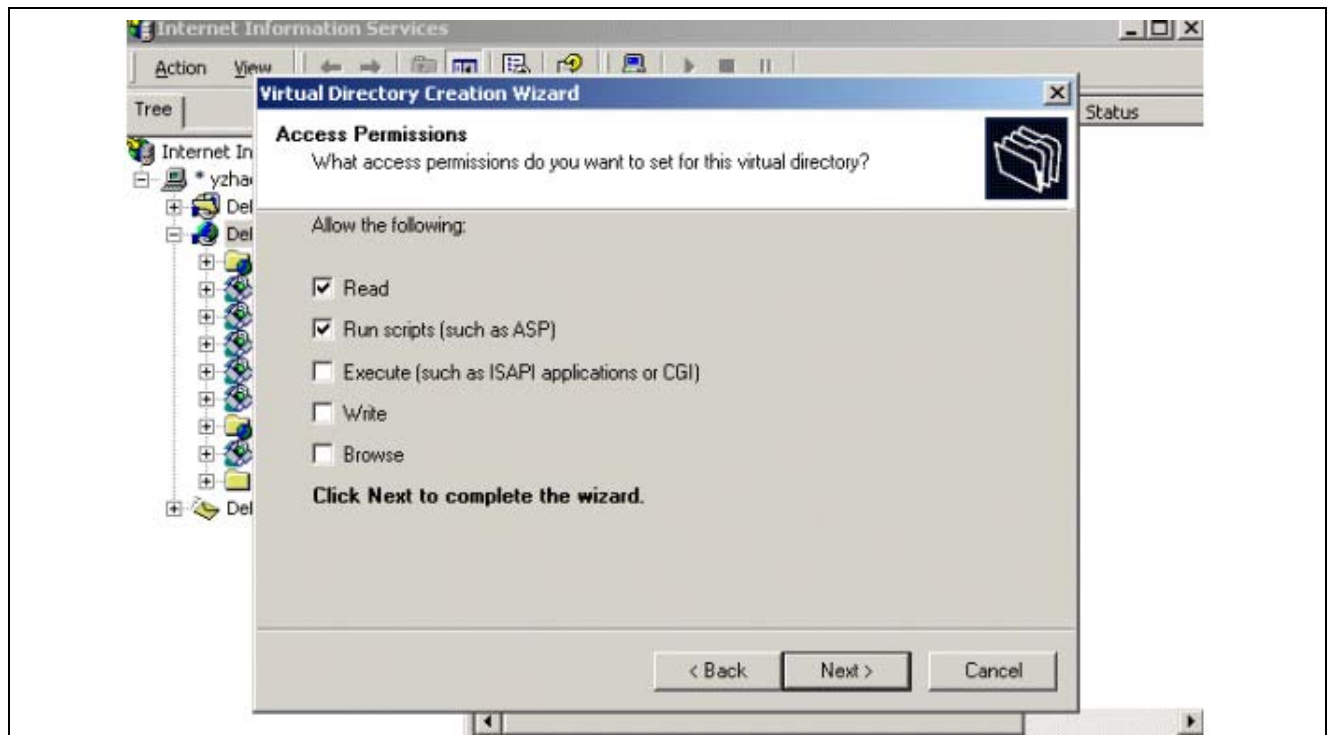
Virtual Directory Alias

4. You must identify the PeopleSoft web service software installation directory where you unzip the software.



Web Site Content Directory

5. Default all of the property selections provided by the system and complete the web site setup.



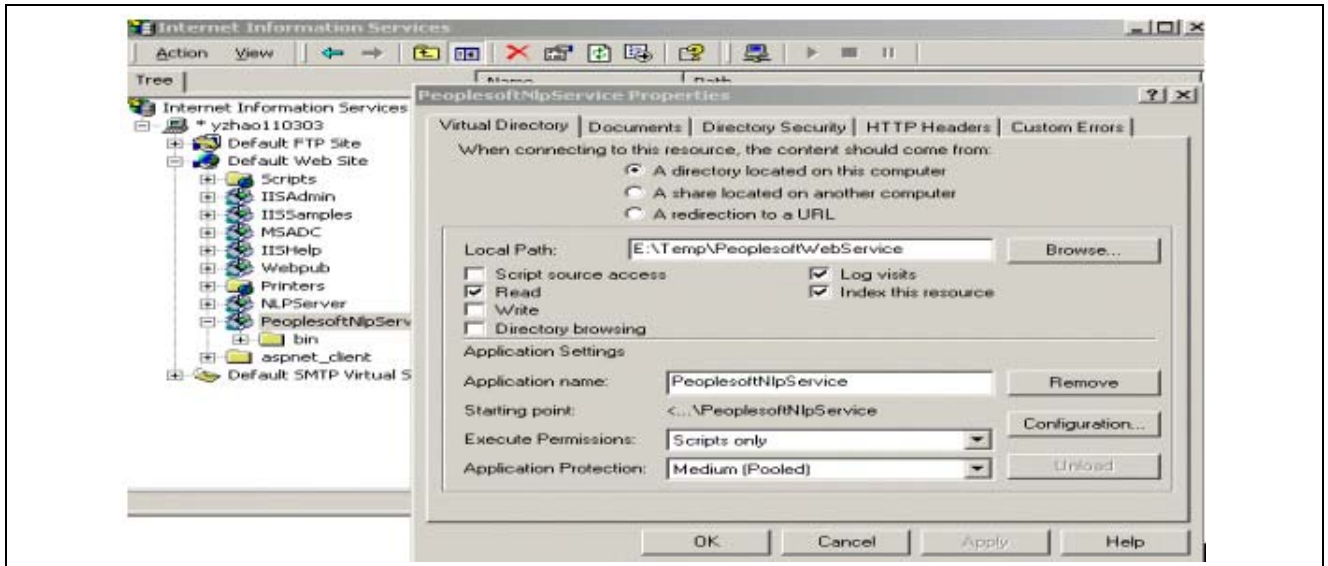
Access Permissions

## Task 14-3: Validating the .NET Runtime Environment

You must confirm that the PeopleSoft web service application is associated with the .Net runtime environment on the installation machine.

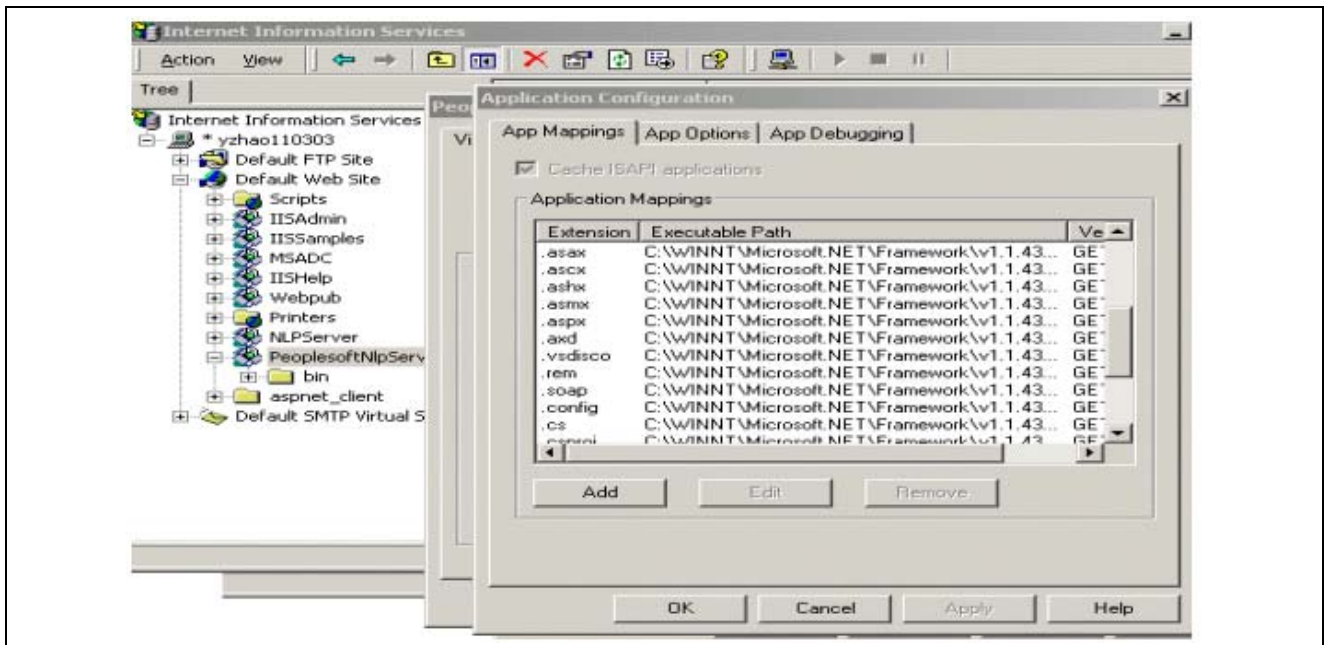
To validate the NET runtime environment:

1. Select the installed web site name. From the toolbar click the Properties button (or right click your mouse and click the menu item Properties), the PeopleSoft NLP Service Properties dialog box displays as follows:



PeopleSoft NLP Service Properties dialog box

2. Click the Configuration button, verify that the App Mappings include .Net framework related file extensions.



Application Configuration dialog box

3. If you do *not* see the app mapping, you must go to the DOS command and perform the following steps:
  - a. Change current folder to `c:\winnt\Microsoft.Net\Framework\v1.1.4322` (latest release number).
  - b. Enter the following command:

*Aspnet\_regiis.exe -s W3SVC/1/ROOT/PeoplesoftWebService*(your virtual directory name).

This installs .Net framework app mappings for the given web site.

---

## Task 14-4: Granting Access to Banter Server

When you install the dot net redistributed package, the local machine account *ASPNET* is created automatically. This local machine account is used to run any .Net web service application. This account is also used to gain access to the banter server.

We recommend that you group all banter users in a designated window group, and then grant those users the necessary permissions to that group. This eliminates the need to restart the banter server when adding a new user. If you create a window group, you must add the *ASPNET* account as the banter server user. By default, *ASPNET* belongs to Users group.

You must go to the DOS command window. Go to the Banter server bin directory and do one of the following:

- Grant.bat your customize group name
- Grant.bat domainname\ASPNET

The domain name should be the domain name of the local *ASPNET* account. This should be your local network machine name.

You can use the customized account to run the asp net application; however, we do not explain that process here. You can go to the Microsoft MSDN website to review the how-to references.

When you install banter server, you are asked to specify under which window account the banter server service is running. However, you can change the run window account.

To change the run window account:

1. Access the DOS command window.
2. Go to the banter server bin directory and enter the follow command:
3. *ChangeServerIdentity.bat* <domain\user-account> <password>
4. Reboot the machine.

---

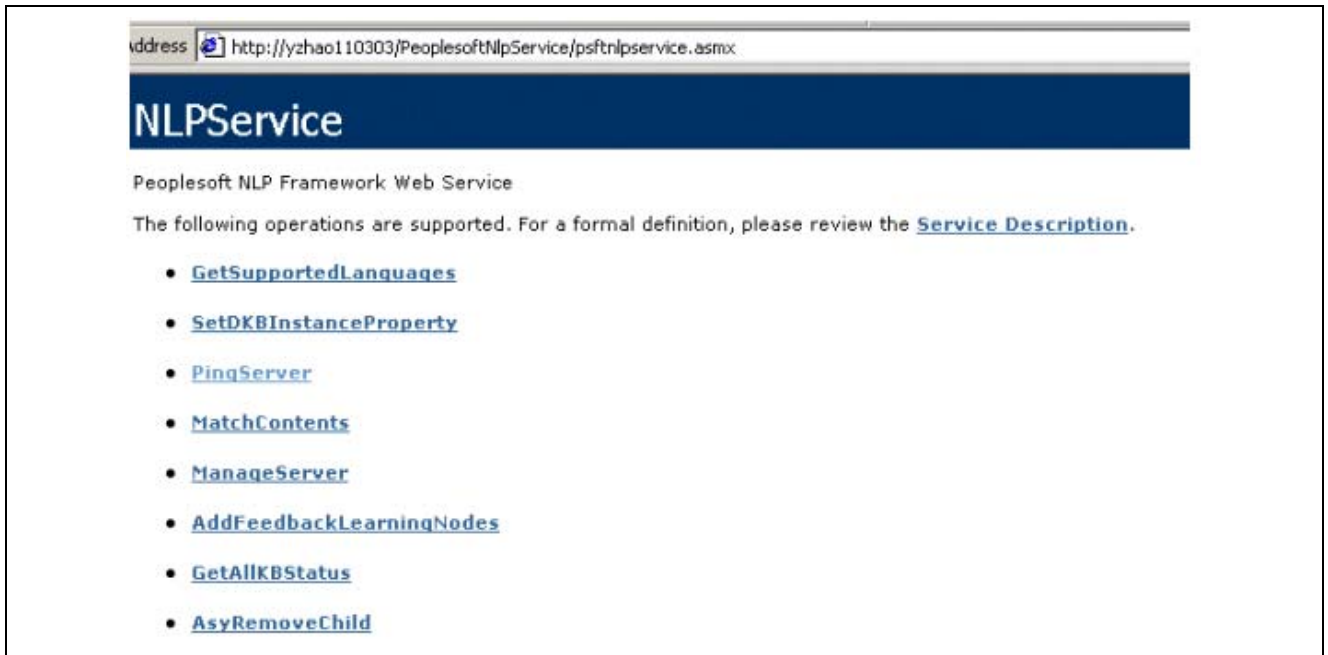
## Task 14-5: Test Web Service from Browser

To test the web service from the browser:

1. In the address field, enter the following link:
2. *http://machinename:port/virtualdirectoryname/psftnlpservice.asmx*

A list of web service methods displays, as in the following example:

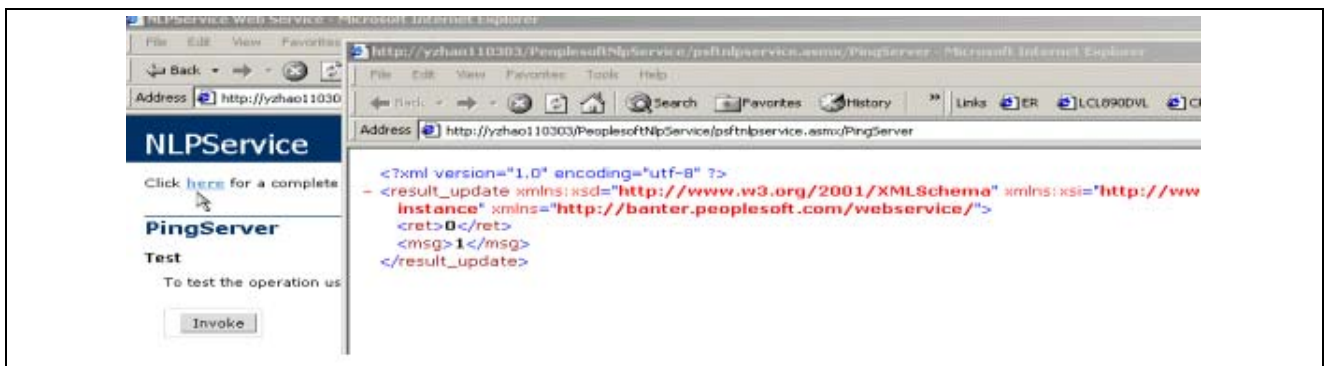




#### NLP Service Methods

3. Click the PingServer link, and then click the Invoke button.

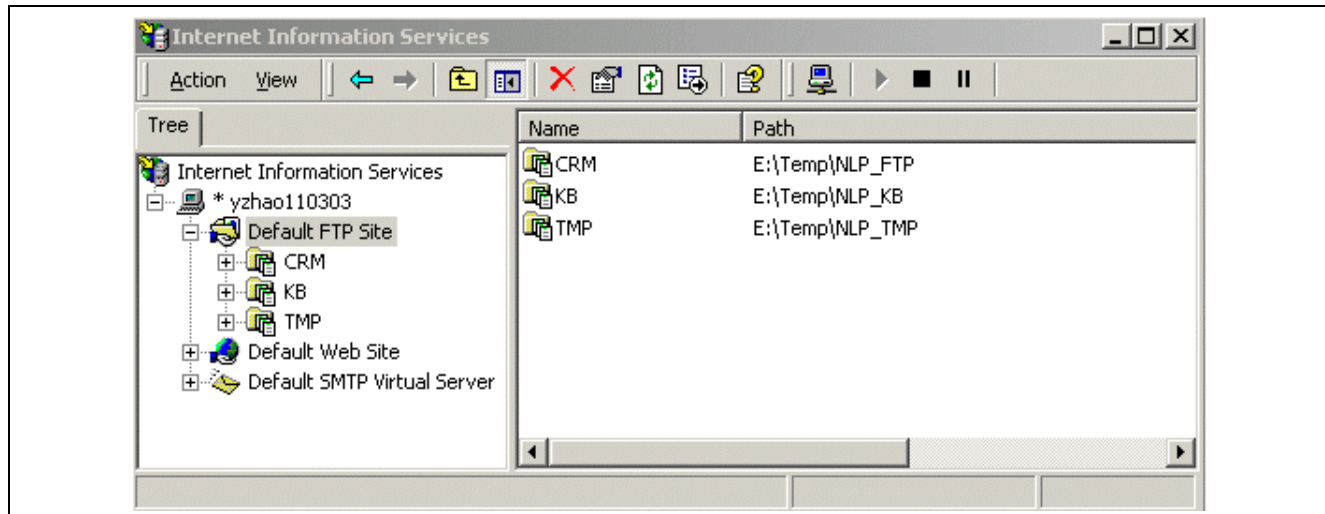
The following response displays, indicating that the PeopleSoft web service software can successfully call Banter server through the Internet.



Successful PingServer Response message

## Task 14-6: Setting Up the FTP Site

Set up the FTP site by using Microsoft Internet Service Manager. We strongly recommend that you set up the FTP site on the installation machine instead of on the network FTP server. The PeopleSoft application engine program uses this FTP site to temporarily save the Knowledge Base-related data file. After the data files are exhausted, these files are purged by the PeopleSoft application engine program. For example, the following shows the PeopleSoft CRM FTP site that we use for the NLP test:



Example: Setting Up the FTP Site

After you install the FTP site, proceed to the next step.

**Note.** If you have one shared FTP site in your corporate network and you want to use that FTP server, then you must map the network drive on the installation drive. It is *your* responsibility to define the URL for this FTP site that you created in this step from PeopleSoft Portal (PeopleTools, Utility, Administration, URL).

## Task 14-7: Configuring PeopleSoft Web Service Application Environment

Go to the DOS command window and change the directory to the PeopleSoft web service application installation bin directory. There is an executable file `psconfig.exe`. If you need help, enter `psconfig.exe`, for instructions on how to use this tool.

```
E:\890\NLP_Framework\NLPService\bin>psconfig
Peoplesoft NLP Web Service Configurator Version 1.0.0.0
Copyright (C) Peoplesoft Inc USA 2003 - 2004. All rights reserved

Peoplesoft Configurator Options

- Input Parameter -
/user:<User ID> User Login Identifier (Short form: /u)
/password:<User Password> User Login Password (Short form: /p)
/authenticated:<1 or 0> 1: require authentication 0: No authentication (Short form: /a)
/wkdir:<folder> NLP Web Service Installation folder (Short form: /w)
/ftpsdir:<folder> Local FTP server installation folder (Short form: /f)
/tmpdir:<folder> Specify the temporary folder (Short form: /t)
/map:<file> load peoplesoft language code mapping file (csv format) and reset languages setting (Short form /m:)

- Miscellaneous -
/help Display the usage message (Short form: /?)
/view Display the peoplesoft web service settings (Short form: /v)

- Usage Examples -
psftconfig /v View the application setting
psftconfig /u:sa /p:sa Change the user id and password

psftconfig /m:c:\temp\lang_map.txt The lang_map.txt layout is similar to the sample listed below.
ENG,English
FRA,French
```

Example:: psconfig.exe

The following parameters require configuration:

- AUTHENTICATION

You must assign a value. If you want the web service authenticated, assign a value of "1." Otherwise, assign "0."

- **FTPDIR**

The file direction can be mapped to the network drive; however, mapping to a local drive is recommended. This means that you must install the FTP service on your local machine. Go to the Internet service manager to set up the FTP site. For example, C:\TEMP\CRM\

- **TMPDIR**

Configure a temporary directory. For example, c:\temp\

- **WSDIR**

Specify the PeopleSoft web service installation directory where you can find psftnlpservice.asmx file.

- **USER**

If authentication is required, specify the user ID.

- **PASSWORD**

If authentication is required, specify the password.

The following tables illustrate parameter configuration for two scenarios the case when authentication is required and the case when authentication is *not* required.

- Example: Authentication required.

Parameter	Value
AUTHENTICATION	1
USER	sa_uid
PASSWORD	sa_pwd
FTPDIR	c:\temp\crm\
WSDIR	c:\peoplesoft\nlp\
TMPDIR	c:\temp\

Here is the associated DOS command:

```
Psconfig /a:1 /u:sa_uid /p:sa_pwd /f:c:\temp\crm\ /w:c:\peoplesoft\nlp\ /t:c:\temp\
```

- Example: Authentication *not* required.

Parameter	Value
AUTHENTICATION	0
USER	(not applicable)
PASSWORD	(not applicable)
FTPDIR	c:\temp\crm\
WSDIR	c:\peoplesoft\nlp\
TMPDIR	c:\temp\

Here is the associated DOS command:

```
Psconfig /a:0 /f:c:\temp\crm\ /w:c:\peoplesoft\nlp\ /t:c:\temp\
```



## CHAPTER 15

# Installing PeopleSoft Unified Agent Desktop for PeopleSoft CRM Applications

This chapter discusses:

- Understanding PeopleSoft Unified Agent Desktop
- Prerequisites
- Applying the Required Tools Upgrade Project
- Configuring the Oracle Proxy-Enabled Application Server
- Validating the Connection to the MultiChannel Framework REN Server
- Configuring a User as a PeopleSoft UAD Voice Agent
- Configuring a User as a PeopleSoft UAD MCF Agent
- Configuring Agent Presence Codes
- Overriding the Presence Text of System-Defined Entries (Optional)
- Configuring Action Buttons for the PeopleSoft UAD Console
- Defining Task Category Codes
- Configuring Status Codes
- Enabling PeopleSoft UAD Pagelet for the Home Page (Optional)

---

## Understanding PeopleSoft Unified Agent Desktop

This chapter provides instruction for enabling PeopleSoft Unified Agent Desktop (UAD) within Oracle Enterprise CRM applications. The following installation related tasks must be performed to leverage the features provided in PeopleSoft UAD. These features are:

- Enabling users as computer telephony integration (CTI) agents to receive phone calls.
- Processing customer transactions that relate to the calls.
- Making outbound calls.

In addition, these features enables users to receive other media channel tasks such as agent-to-customer chats, agent-to-agent chats, emails and other generic business tasks.

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**Note.** The PeopleSoft Universal Agent Desktop (UAD) requires Multichannel Framework (MCF) and is not associated to any PeopleSoft CRM Product (for example, PeopleSoft Call Center).

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**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on Oracle's PeopleSoft Customer Connection website to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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## Prerequisites

Before you begin the PeopleSoft UAD installation for PeopleSoft CRM, ensure that these requirements are met:

PeopleSoft MultiChannel Framework (MCF) is installed.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework*, "Enabling MCF Features for CRM Applications."

---

## Task 15-1: Applying the Required Tools Upgrade Project

PeopleSoft UAD is an HTML console embedded within the PeopleSoft component HTML template. Because this is a PeopleSoft CRM-specific implementation, the base Tools objects that render the business component HTML template do not contain the layouts necessary to facilitate the PeopleSoft UAD console. For this reason, a special upgrade project must be applied whenever a PeopleSoft PeopleTools upgrade is performed. The upgrade project is applied using PeopleSoft Application Designer.

To apply the PeopleSoft UAD project for Tools upgrade:

1. Open the PeopleSoft Application Designer.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Getting Started with PeopleTools*, "Understanding Development Tools."

2. Click the From File option under Tools, Copy Project.
3. Using the directory explorer, find the directory where CRM\_UAD\_PTUPGRADE project file is located.
4. In the Select Project from the List Below window, click the CRM\_UAD\_PTUPGRADE entry and then click the Select button.
5. In the Copy From File window, click the Copy button to copy the project file objects into the target database.

---

## Task 15-2: Configuring the Oracle Proxy-Enabled Application Server

If the Oracle proxy setting is enabled on the Application Server where the REN Server is configured, you must specify a fully qualified domain to properly establish the connection to the REN Server.

To configure the REN Server for the Oracle proxy-enabled application server:

1. Select PeopleTools, REN Server Configuration, REN Server Cluster.
2. In the REN Server Cluster URL field, enter the URL in the following syntax format:

```
http://<REN Server machine name>.<domain token name>:<port #>
```

3. Click Save.

---

**Note.** For the non-Oracle proxy enabled application server, the domain token name is not required.

---

---

## Task 15-3: Validating the Connection to the MultiChannel Framework REN Server

To receive and process tasks such as chats, emails and other generic business tasks, the user session must establish a valid connection to the MultiChannel Framework (MCF) REN Server. Otherwise, the user is unable to send or receive MCF tasks. The connection validation consists of two tests:

- The Buffer Test.
- The Ping Test.

To validate connection to MCF REN Server:

1. Using the Administrator login ID and the password, login to the Oracle ECRM session.
2. Select PeopleTools, REN Server Configuration, REN Server Cluster.
3. Search for the current REN Server Cluster and open the definition.
4. Verify that the State flag is set to *Active*.
5. Click the Buffer Test button.

A new pop-up browser window with the page title Buffer Test for REN Server should have been launched with 50,000 bytes successfully processed; otherwise, there is a problem with the REN Server and the issue should be reported to the System Administrator.

6. With the 50,000 bytes correctly processed, the Buffer Test is passed and you can close the Buffer Test browser window.
7. Click the Ping Test button.

A new pop-up browser window with the page title *Ping Test for REN Server* should launch successfully; otherwise, there is a problem with the REN Server and the issue should be reported to the System Administrator.

8. Click the Run Ping Test button from the new Ping Test window.

Verify that 10 Events have been sent and received; otherwise, there is a problem with the REN Server and the issue should be reported to the System Administrator.

### See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework, "Configuring REN Servers. "*

## Task 15-4: Configuring a User as a PeopleSoft UAD Voice Agent

The same installation steps for configuring a CTI agent apply for configuring a user as a PeopleSoft UAD voice agent.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework*, "Configuring PeopleSoft CTI."

---

**Note.** Presence and Reason Code found under Tools configurations are not used by the PeopleSoft UAD functionality since PeopleSoft UAD manages its agent presence and reason codes.

---

With PeopleSoft UAD enabled, the user is given an extra level of tracing capability via the Application Dispatcher logging mechanism. The Application Dispatcher is a new browser window which remains open throughout the PeopleSoft UAD session to handle all events between the agent and the JSMCAPI (Java Server MultiChannel Application Programming Interface). With the new PeopleSoft UAD enabled, the current trace level option provides the following debugging capability:

Trace level	Non-UAD CTI Agent	UAD CTI Agent
0 — None	None	None
1 — Info	J	A, J
2 — Debug	J	A, J

A = Apps Dispatcher Trace Browser window

J = JSMCAPI Trace Browser window

As soon as the PeopleSoft UAD agent logs into a PeopleSoft Enterprise CRM session, either the Application Dispatcher, the JSMCAPI or both, trace browser windows automatically launch depending on the type of trace level option configured for the PeopleSoft UAD agent.

To configure this option:

1. Select PeopleTools, MultiChannel Framework, CTI configuration, Agent.
2. Select the Trace Level from the drop-down list.

To configure Tools enabled CTI agent as a PeopleSoft UAD CTI agent:

1. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Agent Configuration.
2. Enter a valid User ID and click Add a New Value to create a new PeopleSoft UAD agent configuration definition.
3. Click the Add button.
4. In the CTI parameters section, enter the agent's default extension number. The system uses the default *Extension 1* to automatically establish the connection to the CTI server upon initial agent session login.
  - Extension 1: Enter Agent's default extension number.



- Extension 2 (if so configured): Enter Agent's 2nd Extension number .

---

**Note.** Number of lines and extensions are configured by the Tools setup. Currently there are only two CTI configurations currently allowed by tools: 1 Line/2 Extensions or 2 Lines/1 Extension.

---

- Number of Recently Dialed Numbers to Remember: The system stores and remembers the last Number of recently dialed numbers for future use as specified in this field. The default is 10 numbers.
5. Configure the following parameters specific to the agent:
- Warning

Parameter	Description
Minute/Second	This is the time threshold when the system warns the PeopleSoft UAD agent by displaying specially rendered time values. There is no special event taking place; however, the system notifies the agent that the task processing is taking too long.
Style	PSTIMEWARNING (default)  This can be customized by user to use different styles for the warning time.
Display Image	The image displays to the right of the time value. The default is the exclamation mark in a triangle.

- Expired

Parameter	Description
Minute/Second	This is the time threshold when the system warns the PeopleSoft UAD agent that the time allowed to process the customer call has exceeded the time limit allowed by the call center limit.
Style	PSTIMEEXPIRED (default)  This can be customized by the user to apply different styles for the warning time.
Display Image	This image displays to the right of the time value. The default is the red exclamation mark.

6. Click Save to save the PeopleSoft UAD agent configuration.

---

## Task 15-5: Configuring a User as a PeopleSoft UAD MCF Agent

The same installation steps for configuring an MCF agent apply for configuring a user as an PeopleSoft UAD MCF agent.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework "Configuring MCF Agents"*

With the new PeopleSoft UAD enabled, the current Trace Level option provides the following debugging capability:

Trace Level	Non-UAD MCF Agent	UAD MCF Agent
0 — None	None	None
1 — Information	J	A, J
2 — Debug	J	A, J

A = Application Dispatcher Trace Browser window

J = JSMCAPI Trace Browser window

As soon as the PeopleSoft UAD agent is logged into an Oracle ECRM session, either the Application Dispatcher or JSMCAPI or both, trace browser windows are launched depending on the type of Trace Level option configured for the PeopleSoft UAD MCF agent.

To configure this option:

1. Select PeopleTools, MultiChannel Framework, Universal Queue, Administration, Agents.
2. Select the Trace Level from the drop-down list.

To configure Tools enabled MCF agent as a PeopleSoft UAD MCF agent:

1. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Agent Configuration.
2. Enter a valid User ID and click Add a New Value to create a new PeopleSoft UAD agent configuration definition.

If the Agent definition already exists, search and open the existing definition. Otherwise, click the Add button to add a new agent definition.

3. In the Default Agent Queue section, enter the agent's default queue to which the agent automatically logs in upon initial session login.
4. The same Warning and Expired settings are used for both voice calls as well as other MCF tasks.

Please refer to Task: Configuring a user as a PeopleSoft UAD voice agent for instructions on how to configure these parameters.

5. Click Save to save the PeopleSoft UAD agent configuration.

---

## Task 15-6: Configuring Agent Presence Codes

Presence Codes are the value of text strings which are pre-defined and used internally by the JSMCAPI framework to determine the state of PeopleSoft UAD agents. JSMCAPI, based on the current state of the agent, manages and decides how to best route the MultiChannel tasks to the most appropriate agent to handle the incoming tasks. The Presence Text displays on the PeopleSoft UAD console with respect to the corresponding Agent state.

In a typical installation, there is no need to configure presence codes for Agent because the system defined entries are sufficient for the PeopleSoft UAD operations.

To configure Agent Presence codes:

1. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Agent Configuration.

2. Select the PeopleSoft UAD Presence Codes tab.

The following entries are system defined defaults and delivered out of the box:

Channel	Presence State	Presence Text	Reason code
Voice	Not Ready	Not Ready	Unavailable
Voice	Ready	Ready	(not applicable)
Voice	Work Not Ready	Work Not Ready	(not applicable)
Voice	Work Ready	Work Ready	(not applicable)
Multichannel Queue	Available	Available	(not applicable)
Multichannel Queue	Unavailable	Unavailable	(not applicable)
Multichannel Queue	Assumed Unavailable	Assumed Unavailable	(not applicable)

3. To add a system default presence code entry, click the Add System Default button and perform the following tasks:
  - Select a Channel; either Voice or Multichannel Queue.
  - Select a Presence State from the drop-down list.
  - Enter a Presence Text.

---

**Note.** The Reason Code is used only for the Unavailable or Not Ready Presence State in Multichannel Queue or Voice channel respectively.

---

## Task 15-7: Overriding the Presence Text of System-Defined Entries (Optional)

The PeopleSoft UAD always uses the presence text of the system-defined entries, unless they are redefined as Agent Default.

To override the system-defined entries:

1. Click the Add Agent Default button.
2. Specify the following values:
  - Select a Channel; either Voice or Multichannel Queue.
  - Select a Presence State from the drop-down list.
  - Enter a Presence Text.
  - Enter a Reason code if the Presence State selected is either Not Ready for the Voice channel or Unavailable for the Multichannel Queue channel.
3. Click Save to save the PeopleSoft UAD Agent Configuration.

## Task 15-8: Configuring Action Buttons for the PeopleSoft UAD Console

All of the PeopleSoft UAD management tasks are performed and managed by clicking a button or a text short-cut key. The configuration of the peopleSoft UAD console is highly customizable. The look-and-feel of the console can be easily modified to meet the requirement of a user site.

In a typical installation, there is no need to configure action buttons because the system-defined entries are sufficient for the PeopleSoft UAD operations.

To configure action buttons for the PeopleSoft UAD console:

1. Login to the PeopleSoft Enterprise CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select a Display Option. Default is Image.

---

**Note.** Action buttons on the PeopleSoft UAD console can be rendered either as an image or as text. The text option renders all action buttons with the text label; the image option renders the corresponding image icons for each button.

---

4. Click the Add Button to add an Action button definition.
  - Button Name—Name of the action button.
  - Call Action—Action that clicking the button executes.
  - Disabled—If selected, the button is not used.
  - Label—Text label of the button used when the text display option is selected.
  - Enabled Button Image—Name of the button image.
5. Click Save to save the button definition.

---

**Note.** To support a comprehensive set of existing CTI functionalities, the following button entries are required and delivered as default system data. Removing any of the system default button entries will break the CTI functionalities and is *not* recommended.

---

This table lists system-defined default action buttons:

Button Name	Call Action	Disabled	Label	Enabled Button Image
COMPLETE	Complete	No	CP	PS_UAD_CALL_COMPLETE_ICN
CONFERENCE	Conference	No	CF	PS_UAD_CONFERENCE_ICN
CONSULT	Consult	No	CS	PS_UAD_CONSULT_ICN
CONSULT TRANSFER	Consultative Transfer	No	CT	PS_UAD_CONSULT_TRANSFER_ICN

Button Name	Call Action	Disabled	Label	Enabled Button Image
CTI AVAILABLE	Make CTI Available	No	A	PS_UAD_VOICE_AVAILABLE_ICN
DIAL OUT	Dial Out	No	D	PS_UAD_MAKE_CALL_ICN
HOLD	Hold	No	H	PS_UAD_HOLD_ICN
RECONNECT	Reconnect	No	RC	EOPP_LINK_NODE_ICN
RELEASE	Release	No	X	PS_UAD_RELEASE_ICN
RETRIEVE	Retrieve Hold	No	RH	PS_UAD_RETRIEVE_ICN
TRANSFER	Transfer	No	T	PS_UAD_TRANSFER_ICN

## Task 15-9: Defining Task Category Codes

Task category codes are codes that are selected by the task processing PeopleSoft UAD agent to categorize MCF tasks at the time of their completion. The following task scenarios trigger the task categorization that the PeopleSoft UAD agent requires:

- Terminating a customer voice call (Releasing or Transferring to another internal PeopleSoft UAD CTI agent).
- Terminating a customer chat.
- Closing an email.

The list of Task categories is presented on the PeopleSoft UAD console as drop-down entries.

To define Category Codes:

1. Login to a PeopleSoft Enterprise CRM session as *Administrator*.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Click the Category Codes page tab.
4. Click the Add Category Code button to add a new category code entry as follows:
  - Order — Displays the order of the category code. The lower number entry appears first vertically in the drop-down field.
  - Code — The category code that is used internally by the PeopleSoft UAD framework.
  - Description — Provides a description of the category. The description is displayed in the category drop-down field.
5. Click Save to save the category code definition.

---

## Task 15-10: Configuring Status Codes

Status codes are definition entries used in the PeopleSoft UAD status popup windows to help the PeopleSoft UAD agent change his/her state. In conjunction with action buttons defined for the PeopleSoft UAD console, they together dictate the behavior of how agents receive MCF and CTI tasks accordingly. In a typical installation, there is no need to configure status codes because the system defined entries are sufficient for the PeopleSoft UAD operations.

To add a new CTI Status Code:

1. Login to a PeopleSoft Enterprise CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select the Status Codes tab.
4. Click the Add CTI Status Code button to add a new status code for the CTI channel.
  - Order — Displays the order of the Status code in the Status pop-up window. The lower number entry appears first vertically in the status window.
  - Status Label — The text string value of the status that appears in the status window.
  - Event — The corresponding event action that is being executed upon selecting the status.
  - Image Name — The name of the Image icon that is being rendered.
  - Image — A preview of the Image icon selected.
  - Reason Code — The reason code for the Unavailable event status.
5. Click Save to save the new CTI Status code.

To add a new Multichannel Queue Status Code:

1. Login to a PeopleSoft Enterprise CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select the Status Codes tab.
4. Click the Add Multichannel Queue Code button to add a new status code for the MCF channel.

Multichannel Queue Status code definitions are as follows:

- Order—the display order of the Status code in the Status pop-up window.  
The lower number entry appears first vertically in the status window.
  - Status Label—the text string value of the status that appears in the status window.
  - Event—the corresponding event action being executed upon selecting the status.
  - Image Name—the name of the image icon being rendered.
  - Image—the preview of the image icon selected.
5. Click Save to save the new Multichannel Queue Status code.

The following default CTI Status codes are delivered as system data:

Order	Status Label	Event	Image Name	Reason Code
1	Available	Available	PS_UAD_VOICE_AVAILABLE_ICN	(not applicable)
2	Unavailable	Unavailable	PS_UAD_VOICE_UNAVAILABLE_ICN	Unavailable
3	Do Not Disturb	Do Not Disturb	PS_UAD_VOICE_BUSY_ICN	Do Not Disturb
4	Busy	Busy	PS_UAD_VOICE_BUSY_ICN	Busy
5	At Lunch	At Lunch	PS_UAD_VOICE_UNAVAILABLE_ICN	At Lunch
6	On Break	On Break	PS_UAD_VOICE_UNAVAILABLE_ICN	On Break
7	Away	Away	PS_UAD_VOICE_UNAVAILABLE_ICN	Away
8	In Wrap-Up Mode	In Wrap-Up Mode	PS_UAD_VOICE_UNAVAILABLE_ICN	In Wrap-Up Mode

The following, default Multichannel Queue Status codes are delivered as system data:

Order	Status Label	Event	Image Name
1	Available	Available	PS_UAD_MC_AVAILABLE_ICN
2	Unavailable	Unavailable	PS_UAD_MC_UNAVAILABLE_ICN
3	Busy	Busy	PS_UAD_MC_BUSY_ICN
4	At Lunch	At Lunch	PS_UAD_MC_UNAVAILABLE_ICN
5	On Break	On Break	PS_UAD_MC_UNAVAILABLE_ICN
6	Away	Away	PS_UAD_MC_UNAVAILABLE_ICN

## Task 15-11: Enabling PeopleSoft UAD Pagelet for the Home Page (Optional)

The content on user's home page for the Oracle ECRM applications is rendered via pagelets. To allow users to render PeopleSoft UAD console in a pagelet, the agent must enable the Multichannel Toolbar option from the Content Personalization menu.

To enable PeopleSoft UAD Console for the Home page:

1. Login as a PeopleSoft UAD agent.
2. Click the Content personalize link.
3. In the CRM pagelet section, select the Multichannel Toolbar check box.
4. Click the Personalize Layout link to Arrange pagelets.
5. In the right column, click the Multichannel Toolbar entry once to highlight it.
6. Click the up arrow button near the Delete Pagelet button to move the Multichannel Toolbar entry to the top of the right column.

---

**Note.** This step is recommended only when the PeopleSoft UAD agent has other main menu pagelets that are too large to view the PeopleSoft UAD console without scrolling vertically to the end of the page.

---

7. Click Save.



## CHAPTER 16

# Installing PeopleSoft Operational Dashboards for PeopleSoft CRM 9

This chapter discusses:

- Preparing for Installation
- Installing PeopleSoft Dashboard
- Verifying Installation Directories

PeopleSoft Dashboard is a separate module and must be installed separately.

---

## Preparing for Installation

This section discusses:

- Prerequisites
- Reviewing Hardware and Software Requirements
- Reviewing the Installation Procedure
- Using the Installation Worksheet
- Using Additional Information

### Prerequisites

Before you install the PeopleSoft Operational Dashboards for PeopleSoft CRM application, ensure that the installation environment meets these criteria:

- Databases are running on PeopleSoft PeopleTools 8.48 or higher.
- An application server and a web server for the PeopleSoft CRM 9 database have been installed and configured.

See *PeopleSoft Enterprise PeopleTools 8.48: Installation for Oracle*.

### Reviewing Hardware and Software Requirements

PeopleSoft Operational Dashboards for PeopleSoft CRM 9 require no additional hardware or software beyond those specified for Oracle BAM 10g, PeopleSoft PeopleTools 8.48, and the installed PeopleSoft CRM 9 applications.

## See Also

*Oracle BAM Installation Guide Release 10g*

*PeopleSoft Enterprise PeopleTools 8.48: Installation for Oracle*

## Reviewing the Installation Procedure

PeopleSoft Dashboard 9 installation consists of these general steps:

1. Installing PeopleSoft Operational Dashboards for PeopleSoft CRM 9.
2. Installing and configuring Oracle BAM for PeopleSoft Dashboard.
3. Customizing Oracle BAM Enterprise Link.
4. Setting Up PeopleSoft Pure Internet Architecture for integration with Oracle BAM.
5. Setting Up Oracle BAM for integration with PeopleSoft Pure Internet Architecture.
6. Setting Up Single Signon.
7. Testing access to the PeopleSoft Dashboard.
8. Sharing PeopleSoft CRM security information with PeopleSoft Dashboard.

## Using the Installation Worksheet

Appendix A, “Using the PeopleSoft Dashboard System Parameter Worksheet,” provides a form to record the various file paths and URLs specific to the installation of your system. Numerous values are established in early installation tasks that are later required in subsequent setup tasks. By using this record sheet, you can access such values quickly, avoiding errors and saving time as you proceed through the tasks of this installation. After the system is installed and configured, you can refer to this record sheet for maintenance and troubleshooting.

Before you begin installing PeopleSoft Dashboards for PeopleSoft CRM, review the Worksheet for the values already established during the installation of PeopleSoft PeopleTools.

## Using Additional Information

Appendix B, Reviewing Install Component Default Locations, lists the default file locations of PeopleSoft Dashboard components. Reference this information whenever you need to find specific files or directories.

Appendix C, Understanding Architecture and Process Flow, describes and illustrates how messages flow between the components of the system. Understanding the system’s basic process flow makes troubleshooting and maintenance planning easier.

---

## Task 16-1: Installing PeopleSoft Dashboard

To install PeopleSoft Dashboard: perform the following steps, unless performed earlier during the installation of the Application CD:

See *PeopleSoft Enterprise PeopleTools 8.48: Installation for Oracle* "Installing the Application CD."

1. Locate setup.exe on the CD for PeopleSoft CRM 9.
2. Double-click the file name to launch the installer.

3. Proceed through the installation dialogs and select the all the required dashboard options.

---

## Task 16-2: Verifying Installation Directories

To verify that the install process copied all project files, scripts, and DAT files to the installation machine, ensure that these subdirectories are in the installation directory (<PS\_HOME>\setup\rts\_dashboard):

- alert
- dataobject
- ems
- folder
- install
- install\images
- plan
- report
- role
- sampledata
- securityfilter
- user

---

**Note.** Record the value for <PS\_HOME> in the System Parameter Worksheet (Appendix A) for later reference.

---

See "Using the System Parameter Worksheet."



## CHAPTER 17

# Installing and Configuring Oracle Business Activity Monitoring for PeopleSoft Dashboard

This chapter discusses:

- Installing Oracle BAM 10g
- Modifying Web Server Access
- Verifying Oracle BAM Access
- Verifying Oracle BAM Services
- Extending the Maximum Number of Processes

---

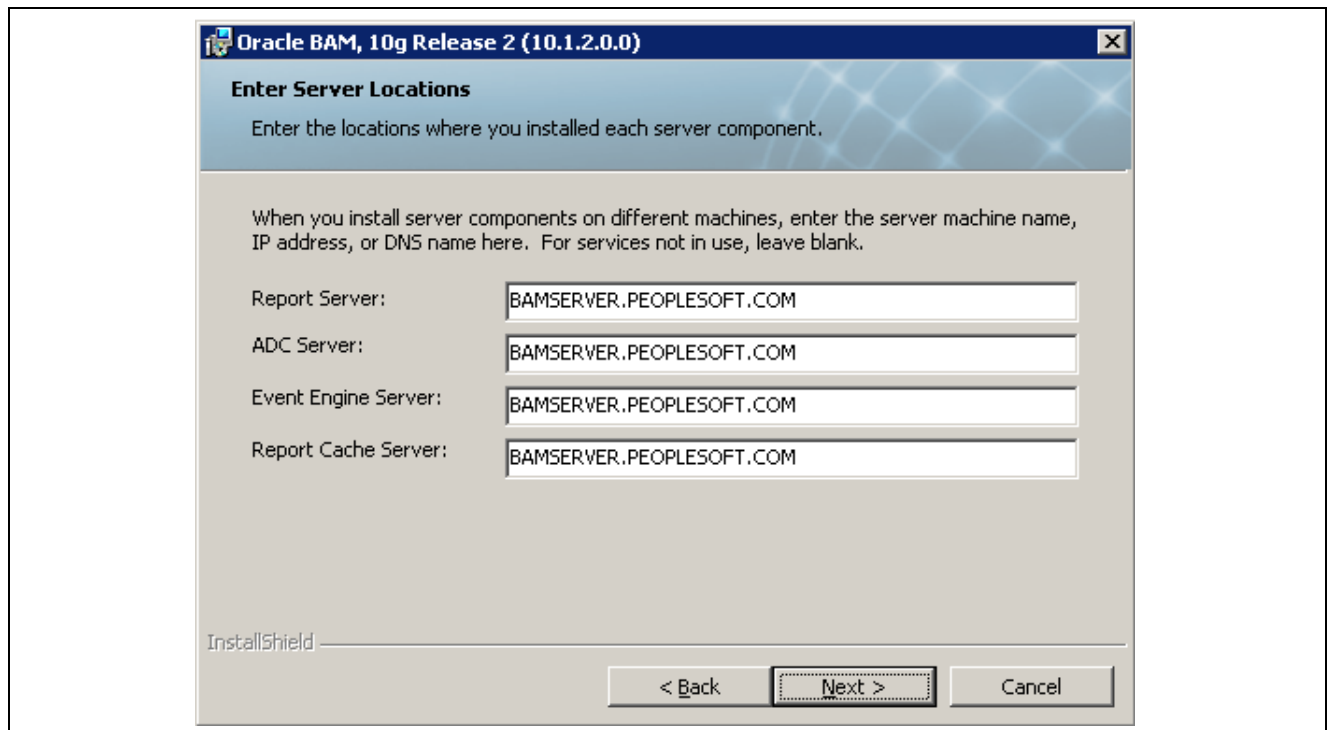
### Task 17-1: Installing Oracle BAM 10g

Install Oracle Business Activity Monitoring (BAM), including Enterprise Link and BAM, as described in *Oracle BAM Installation Guide Release 10g*.

To optimize the integration of PeopleSoft CRM and Oracle BAM components, follow these recommendations:

- Initial tablespace size for database accounts.  
Create two database accounts, ORACLEBAM and SAGENT, setting the initial tablespace size of each to 2 GB, with Auto Extents set to *ON*.
- Optional features.  
When you install Enterprise Link, accept the default feature selections.  
However, when installing Oracle BAM, clear the default-selected check boxes for these Oracle BAM components, as they are not required by PeopleSoft Dashboards for PeopleSoft CRM:
  - Active Messenger
  - Sample Data Objects
  - ADC Clustering Support (under the Active Data Cache feature)
  - Collaboration Service
  - Enterprise Link MSMQ WebService
- Domain names.

If you plan to implement PeopleSoft Single Signon, all Oracle BAM server components must have the same machine domain name. Therefore, at the Enter Server Locations dialog box of the Oracle BAM installation, enter the machine domain name for each server as shown in the following example.



Domain name example for Oracle BAM installation

Record the relevant machine name domain names in the Worksheet.

---

**Important!** If the IIS port was changed to a port other than the default 80, you must modify URL-related values in the following three places to include the port number.

---

1. Modify the URL-related values to include the port number in these three places:
  - a. The Oracle BAM URL
  - b. The web.config file
  - c. The OracleBAMEventEngine.exe.config file
2. Locate the web.config file in the Oracle BAM installation directory, and modify the ApplicationHostName value to include the IIS port number (<machine name.domain:IIS Port>).
3. Repeat this modification in the OracleBAMEventEngine.exe.config file for the WebServerName value.

---

## Task 17-2: Modifying Web Server Access

To modify web server access for PeopleSoft Dashboard:

1. Open Internet Information Services (IIS) Manager (Start, Programs, Settings, Control Panel, Administrative Tools).
2. Select the name of the machine that is running the Oracle BAM web server.
3. Select WebSites, Default Web Site, OracleBAM.
4. Right-click and select *Properties*.

5. Select the Directory Security tab.
6. Click the Edit button in the Authentication and access control group box.
7. Clear the check box for Enable anonymous access, and select the check box for Integrated Windows authentication.
8. Return to the folder pane and select *Services* in Oracle BAM.
9. Right-click and select *Properties*.
10. Select the Directory Security tab.
11. Click the Edit button in the Authentication and access control group box.
12. Select the check box for Enable anonymous access, and clear the check box for Integrated Windows authentication.

---

## Task 17-3: Verifying Oracle BAM Access

You can verify access to the newly installed Oracle BAM by launching Oracle BAM Start Page and viewing PeopleSoft Dashboard data.

To verify Oracle BAM access:

1. In the browser URL box, enter the Oracle BAM web server URL to launch Oracle BAM Start Page.

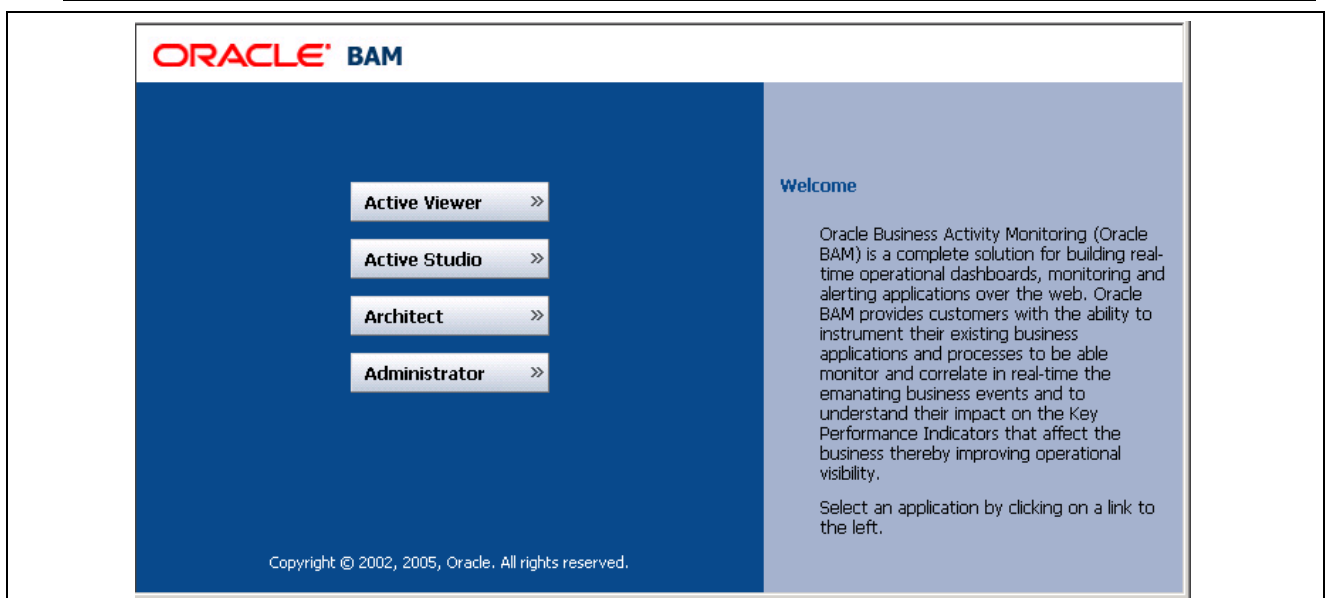
`http://<machine name.domain name>:<port number>/ORACLEBAM/`

Example: `http://bamserver.peoplesoft.com/ORACLEBAM/`

---

**Warning!** BAM Web page access is case-sensitive. Use the same account that was used during the Oracle BAM web server install, observing case.

---



Oracle BAM Start Page

2. Click the Architect button.

Oracle BAM Architect launches.

3. Return to the Oracle BAM Start Page and click the Active Studio button.

Oracle BAM Active Studio launches.

---

## Task 17-4: Verifying Oracle BAM Services

Open Windows services (Start, Programs, Settings, Control Panel, Administrative Tools). Verify that the Oracle BAM services that are required for PeopleSoft Enterprise CRM Dashboard are installed. You can disable other Oracle BAM services if they are installed.

CRM Dashboard applications require these services:

- Oracle BAM Active Data Cache
- Oracle BAM Data Flow Service
- Oracle BAM Plan Monitor
- Oracle BAM Report Cache
- Oracle BAM Event Engine

---

**Important!** When you start Oracle BAM services, start them in the order that they appear in the preceding list. Conversely, when you stop the services, stop them in the *reverse* order shown.

Additionally, start all of the preceding services with the network user ID (see the Worksheet).

---

---

## Task 17-5: Extending the Maximum Number of Processes

To set the maximum number of processes allowed by your Oracle database server:

1. Open the `init<instance>.ora` file in the `$ORACLE_HOME/dbs` directory of the database server.
2. Set the `processes` parameter to `150`.
3. Restart the instance of the Oracle database.
4. Restart all Oracle BAM services. Refer to the previous task for the order of the restart.

See Verifying Oracle BAM Services.



## CHAPTER 18

# Customizing the Oracle BAM Enterprise Link

This chapter discusses:

- Customizing the Oracle BAM Enterprise Link

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### Task 18-1: Customizing the Oracle BAM Enterprise Link

To modify Oracle BAM Enterprise link configuration:

1. Launch Oracle BAM Enterprise Link Admin (Start, Programs, Oracle BAM Enterprise Link, Admin).
2. Select the Servers tab.
3. On the Servers tab, click the Register New button.
4. Enter the machine name running the Data Flow Service and click the Register button.
5. From the left panel, under the newly registered server name, select *Data Flow Service*.
6. Select the Configuration tab.
7. Enter these parameter values:

Parameter	Value
AgentVMMemory	393216
MaxBlocks	4000
MaxFieldLength	65535
MaxMemoryBlocks	393216
MaxResultBlocks	5000
MaxResults	200
MaxSinkBlocks	5000
MaxUsrMemoryBlocks	393216
MaxUsrThreads	300
MaxUsrToSysLimit	0

8. Stop, then restart both the Plan Monitor Service and the Data Flow Service.
9. From the Oracle BAM Start page, select Architect, Data Objects, System, Plan Monitor.
10. Select an Oracle BAM plan monitor.
11. Select the data object *Journal*.
12. Click the Clear button.

13. Click OK.
14. Click the Continue button.

---

**Note.** If there are multiple plan monitors on different host machines, repeat the steps in this task on *each* machine running a data flow service and plan monitor service. Record the host machines in the Worksheet.

---

## CHAPTER 19

# Setting Up PeopleSoft Pure Internet Architecture for Integration with Oracle BAM

This chapter discusses:

- Setting Up PeopleSoft CRM Dashboard Administrator User
- Setting the Authentication Domain
- Enabling Parallel Message Processing
- Setting Up the Process Scheduler
- Creating a JMS Server
- Setting Up a Gateway
- Configuring the PT\_CDB\_WEB\_SERVICE Node
- Setting Up the URL for Oracle BAM Start Page
- Verifying JMS Dependencies

---

### Task 19-1: Setting Up PeopleSoft CRM Dashboard Administrator User

This task specifies steps to create the main PeopleSoft CRM Dashboard user. This user enables later PeopleSoft Dashboard installation steps. This user is also installed on the Oracle BAM Dashboard side of the integration (instructions for Oracle BAM are in the next chapter).

See "Setting Up Oracle BAM Integration with PeopleSoft Pure Internet Architecture."

To set up PeopleSoft CRM Dashboard Administrator PTCDBADMIN User:

1. Log on to the PeopleSoft application as VP1.
2. In the PeopleSoft application, select PeopleTools, Security, User Profiles, Copy User Profiles.
3. On the Search page, select the existing VP1 user ID.
4. Enter the PTCDBADMIN value into the New User ID, New Password and Confirm Password fields.
5. Enter the PeopleSoft CRM Dashboard Administrator value in the Description field.
6. Click Save.

## Task 19-2: Setting the Authentication Domain

This task specifies the string that completes the domain portion of an HTTP address, for example, .mydomain.com. Setting the authentication domain enables cookie-sharing between the portal and Oracle BAM Active Server and other system web applications. In addition, it is required for the Single Signon setup as discussed in a later chapter.

See "Setting Up PeopleSoft Single Signon for PeopleSoft Dashboard."

To set the authentication domain:

1. In the PeopleSoft application, select PeopleTools, Web Profile, Web Profile Configuration.
2. On the Search page, select the profile that was used during PeopleSoft Pure Internet Architecture setup in the Profile Name field.
3. On the General tab, enter a value in the Authentication Domain field.

Enter the name of the extended authentication domain in which the portal is running, starting with a leading period. This value overrides, but must be compatible with, the base-level authentication domain. For example, if you entered .customer.com during the PeopleSoft Pure Internet Architecture setup, only values such as .enterprise.customer.com and .individual.customer.com are valid.

The screenshot shows the 'General' tab of the 'Web Profile Configuration' page. The 'Profile Name' is 'PROD' and the 'Description' is 'Installation Defaults'. The 'Authentication Domain' is set to '.enterprise.basedomain.com'. There are buttons for 'Save As ...' and 'View History'. Below the text fields are three checked checkboxes: 'Compress Responses', 'Compress Response References', and 'Compress Query'. The 'Compress Mime Types' field contains 'application/x-javascript;text/javascript;text/css;text/html'.

Web Profile Configuration - General page (partial)

4. Click Save and then record the value in the Worksheet.
5. Restart the PeopleSoft application server.

### See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Internet Technology*, "Configuring the Portal Environment."

## Task 19-3: Enabling Parallel Message Processing

Perform this step only if you want to use multiple daemon processes to manage the message change queue. Skip this task and proceed to the next task if you intend to use a single process scheduler for managing processes.

We recommend parallel processing because of the significant performance benefits; however, it is not mandatory.

See *PeopleSoft Enterprise Dashboard Integration Framework for CRM9 PeopleBook*.

See Appendix: “Using the PeopleSoft Dashboard System Parameter Worksheet.”

To enable parallel processing:

1. Create a new Daemon Group definition:
  - a. Select PeopleTools, Process Scheduler, Daemon Group.
  - b. Access the Add a New Value page, enter a new name and click the Add button.  
The Daemon Group page appears.
  - c. Click the Lookup icon for the Program Name field and select *PT\_CDB\_PMSG*.
  - d. Click the Save button.

2. Create a new Server definition:
  - a. Select PeopleTools, Process Scheduler, Servers.
  - b. Access the Add a New Value page, enter a new name and click the Add button .  
The Server Definition page appears.
  - c. In the Process Types run on this server grid, enter these values and click Save:

Field	Value
Process Type	<i>Application Engine</i>
Priority	<i>Medium</i>
Max. Concurrent	<i>2</i>

- d. Access the Daemon page.
  - e. Select the Daemon Enabled check box.
  - f. In the Daemon Group field, select the daemon group that you created in the previous step.
  - g. In the Daemon Sleep Time field, enter *1*.
  - h. Click the Save button.
3. Run `psadmin.exe` to set up a Process Scheduler for the server that you created. In the configuration menu that appears, use the new server’s Server Name value for item *12 — Server Name*.
4. Modify and run the `dash_change_appserver_cdb.dms` data mover script.
  - a. Open the script in PeopleSoft Data Mover.
  - b. Change the Server Name string to the name of the process scheduler server that you created in the previous step.
  - c. Change the value of the Application Code to the Installed Dashboard Product Code of the PeopleSoft Dashboard that will be processed by this server. Codes are provided in the following table and in the Worksheet.

PeopleSoft Dashboard Product	Code
Common Dashboard	<i>RBD</i>
Sales Dashboard	<i>SLD</i>

PeopleSoft Dashboard Product	Code
Order Capture Dashboard	<i>OCD</i>
Contact Center Dashboard	<i>SDB</i>

---

**Note.** A single process scheduler server can have multiple application codes associated with it; however, an application code is assigned to only one server.

---

- d. Run the script.
5. Repeat steps 2 through 4 for each process scheduler in the system.

---

**Note.** Each PeopleSoft Dashboard requires at least one process scheduler dedicated to its common-object and application-specific processing needs. However, performance is optimal with at least two process schedulers per PeopleSoft Dashboard—one for the common objects and one for the application-specific objects. Some PeopleSoft Dashboards may require more than two process schedulers for optimal processing.

---

For example, if you are installing the PeopleSoft Sales Dashboard, you require two different process schedulers to enable parallel processing. However, if you decide to run the process schedulers on one server, you can assign the application code to a valid server name by repeating step 4.

6. Select Set Up CRM, Product Related, Dashboard, Installation Options.
7. Select the Parallel Processing Enabled check box and click Save.

---

**Note.** As delivered, the system suppresses dashboard messaging during the Sequential Initial Data load. Running the `dash_allow_messaging_cdb.dms` script overrides this setting, causing significant performance degradation. Oracle recommends that you use the delivered configuration and that you do *not* run this script. Refer to *PeopleSoft Enterprise Dashboard Integration Framework for CRM9 PeopleBook* for a discussion of suppressing messaging during batch data loads. However, if you want to override the default behavior, you can run the script via the PeopleSoft Data Mover after triggering the sequential Initial Data Load.

---

## Task 19-4: Setting Up the Process Scheduler

This task configures the PSCDB process scheduler, which watches the message queue for PeopleSoft Dashboard message requests initiated by the PeopleSoft application. When a new request appears in the queue, it processes the request and sends the message to the JMS server.

---

**Important!** Perform this task *only* if you have *not* enabled parallel processing.

---

To set up the PSCDB process scheduler:

1. Create a new Daemon Group definition:
  - a. Select PeopleTools, Process Scheduler, Daemon Group.
  - b. Access the Add a New Value page, enter a new name and click the Add button.  
The Daemon Group page appears.
  - c. Click the Lookup icon for the Program Name field and select *PT\_CDB\_UPDAT*.
  - d. Click the Save button.

2. Select and run `<PS_HOME>\appserver\psadmin.exe`, accepting the default values and modifying only the following values:

Master Schdlr: *No*

PrsServer: *PSCDB*

UserId and UserPwd: *PTCDBADMIN* and the corresponding password.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, "Using PSADMIN Menus."

---

**Note.** If the Process Scheduler Server Configuration with the default database name was already created, create another Process Scheduler Server Configuration with the different name and update the DBNAME with the actual database name.

---

3. Access the process scheduler configuration file and uncomment the JavaVM Options parameter by removing the semicolon.
4. Set the value of JavaVM Options parameter to *-Xrs*.
5. Set up the process scheduler as a service.
6. Start the Service.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, "Using PSADMIN Menus, Using PSADMIN Menus, Configuring the PeopleSoft Service."

7. Verify that the process scheduler is available in the Process Monitor in PeopleSoft Pure Internet Architecture.
8. Attach the daemon group PTCDBMSG to the process scheduler PSCDB:
  - a. Select PeopleTools, Process Scheduler, Servers.
  - b. Open the PSCDB server.
  - c. Access the Daemon page and verify that the Daemon Enabled check box is selected.
9. Restart the PSCDB process scheduler service that was created in the previous steps.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, "Using PSADMIN Menus, Using PSADMIN Menus, Configuring the PeopleSoft Service."

---

## Task 19-5: Creating a JMS Server

There are two ways to create a JMS Server:

- Manual parameter entry and setup.
- Using the delivered template for WebLogic only.

---

**Note.** The delivered template creates a JMS server on a WebLogic web server.

---



---

**Important!** Loading the template overrides any existing JMS server configuration, creating a new instance of JMS server on the WebLogic server.

---

To create a JMS Server manually, enter these values using the web server's JMS management utility:

1. Enter settings for the Connection Factory - PSFT DSH JMS Connection Factory.

Parameters	Values
JNDI Name	psft.dsh.jms.connection.factory
Delivery Mode	Persistent
Default Time To Live	172,800,000 ms (48 hours) (suggested)
Messages Maximum	4,000 (suggested)
Overrun	Keep Newest (suggested)

2. Enter settings for the Topic - PSFT DSH Update Topic.

Parameters	Values
JNDI Name	psft.dsh.jms.topic.update
Template	PSFT DSH Topic Template (suggested)

3. Enter settings for the Topic - PSFT DSH Raw Update Topic.

Parameters	Values
JNDI Name	psft.dsh.jms.topic.updateraw
Template	PSFT DSH Topic Template (suggested)

4. Enter settings for the Template - PSFT DSH Topic Template.

Parameters	Values
Maximum Message Size	500,000 (suggested) <b>Note.</b> For better performance use a file based message store if possible.

To create a new JMS Server using the delivered template (WebLogic users only):

1. Install WebLogic if it is not already installed.
2. Copy the template jar file PSJMSServer.jar, from the PeopleSoft Dashboard CD folder \<PS home>\setup\rts\_dashboard\install, locally to the \BEA\weblogic81\common\templates\domains folder.
3. Stop the WebLogic service if it has been started.
4. Launch the Configuration Wizard (Start, Programs, WebLogic Platform 8.1).
5. Select the Create a new WebLogic configuration button and click the Next button.
6. In the Local Additional Templates box on the next dialog pane, browse to select the local directory containing PSJMSServer.jar. Click OK.
7. In the Templates box, select *PeopleSoft Dashboard JMS Server* from the Other folder, and then click the Next button.
8. Continue through the rest of the dialogs to complete the install.

You might change the Configuration Name, otherwise accept defaults, the default is *peoplesoft1*.



The install process creates the directory `\user_projects\domains\` with the specified Configuration Name under the WebLogic configuration.

---

**Note.** The Default port number is *8000*.

---

9. Start the JMS server by launching `c:\bea\user_projects\domain\<configuration name>\startJMS.cmd`.

---

**Note.** Ensure that the required environment variables are set by editing and launching `c:\bea\user_projects\domain\<configuration name>\setEnv.cmd`.

---

## Task 19-6: Setting Up a Gateway

To set up a gateway:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Open the gateway *LOCAL*.
3. In the URL field, enter `http://<PIA web server>:<port>/PSIGW/PeopleSoftListeningConnector`.
4. Click the Load Gateway Connectors button.
5. Once the system loads the connectors, click Save.
6. Click the Ping Gateway button.

A confirmation message appears if communication was successful.

7. If you want to use a JNDI factory location other than the delivered default value, you must add a Connector property to the gateway to override the default.

This table lists the delivered connector property default values:

Gateway Connectors	Delivered Default Location Values
WebLogic	weblogic.jndi.WLInitialContextFactory
MQSeries	com.ibm.websphere.naming.WsnInitialContextFactory
IPlanet	com.sun.jndi.fscontext.RefFSContextFactory
Oracle	com.evermind.server.rmi.RMIInitialContextFactory

8. Perform these steps to add a connector property to the gateway:

- a. Return to the Gateways page.
- b. Click the Properties link of the JMSTARGET connector.

The Gateways: Connector Properties page for that connector appears.

- c. Add a new row at the desired position on the grid.
- d. Enter the following values and then save your changes:

Property	Value
Property ID	<i>JMSTARGET</i>
Property Name	<i>JMSJNDIFactory</i>
Required	<i>not checked</i>

Property	Value
Value	<i>no value</i>
Default	<i>not checked</i>

9. Click on the Gateway Setup Properties link.
10. On the login page, enter the user ID *administrator* and the password *password*.  
The PeopleSoft Node Configuration page for the default gateway application server appears.
11. Verify and update the values in the Gateway Default Application Server group box.  
This table lists example values for the Gateway Default Application Server group box:

Field	Example Value
Web Server URL //<machine name.domain name>:<jolt port>	<i>//applicationwebserver.peoplesoft.com:9000</i>
User ID	<i>VPI</i>
Password	<i>VPI</i>
Tools Release	<i>8.48</i>

12. Verify and update the values in the Gateway Default PeopleSoft Nodes grid.  
After saving, click the Ping Node button and verify that a Success message displays.  
This table lists example values for the Gateway Default PeopleSoft Nodes grid:

Field	Example Value
Message Node Name	<i>PSFT_CR</i>
Web Server URL	<i>//applicationwebserver.peoplesoft.com:9000</i>
User ID	<i>VPI</i>
Password	<i>VPI</i>
Tools Release	<i>8.48</i>

13. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
14. Open the node definition PT\_CDB\_UPDATE.
15. Access the Connectors page.
16. Select the Gateway ID of the gateway that you set up.
17. Change the *JMSTARGET* Property ID, *JMSUrl* Property Name to the value of the IP address or machine name of the machine that hosts the JMS server and its port number (see the Worksheet). The Default port number is *8000*.  
Example: *t3://<JMS SERVER NAME>:8000*
18. If you added the Gateway Connector property *JMSJNDIFactory*, enter the desired Java class name in the Value column of *JMSFactory*.
19. Save your changes.
20. Select Set Up CRM, Product Related, Dashboard, Installation Options and click the Ping button to verify connection.

21. Make the vendor-specific JMS client messaging driver accessible to the PeopleSoft application servers and process schedulers.

Do this by copying the jar files in to the `<PS_HOME>/class` directories, or by setting the java classpath in the configuration files of the PeopleSoft application server and process scheduler.

The driver (usually a jar file such as `weblogic.jar`) allows the JMS Sender to communicate with the JMS server. The actual driver class varies by JMS vendor. Currently supported are JMS server vendors such as WebLogic and IBM WebSphere.

---

**Note.** If any classes are missing, you get a *class not found* error at run time, or when pinging the node through the PeopleSoft Dashboard Installation page. If so, verify that `com.peoplesoft.crm.cdb.jar` is in the `<PS_HOME>/class` where the application server resides.

---

You should check any jar files necessary to support JMS connectivity, to ensure that they do not have classes bundled in them that may conflict with classes that the application server would otherwise pick up from its `<PS_HOME>/class` directory. If there are conflicts, then both of the jar files should be manually added to the classpath in the application server configuration file in the appropriate order.

For example, suppose you need `j2ee.jar` for your JMS connectivity. There are classes in there that conflict with the `mail.jar` that PeopleSoft Enterprise PeopleTools delivers. To avoid the conflict, you would explicitly add those two jar files to the classpath in the application server (and process scheduler, if appropriate) configuration file, putting `mail.jar` before `j2ee.jar` so that the classes in `mail.jar` are guaranteed to load before any like-named classes in `j2ee.jar`.

22. Stop and then start the application server.

### See Also

*PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Using Listening Connectors and Target Connectors"*

---

## Task 19-7: Configuring the PT\_CDB\_WEB\_SERVICE Node

This task specifies the parameters necessary for the PeopleSoft Integration Broker to process the messaging sent from PeopleSoft Dashboard.

To configure the `PT_CDB_WEB_SERVICE` node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and open the node definition `PT_CDB_WEB_SERVICE`.
2. Access the Connectors page.
3. Change the value of the `PRIMARYURL` Property ID to the URL that provides the ICommand web service.  
Example: `http://<machine name>.<domain name>:<port number>/ORACLEBAM/Services/ICommand.asmx?DbName=<dbname>`
4. Click Save, and then click the Ping Node button and verify that a Success message displays.

---

## Task 19-8: Setting Up the URL for Oracle BAM Start Page

This task specifies the URL for the navigation link in the left-pane navigation of PeopleSoft applications that launches Oracle BAM Active Studio.

To set up Oracle BAM Start Page:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select the URL identifier named PT\_CDB\_WEB\_URI.
3. Replace it with the machine name (including domain name and port name) of the machine that hosts the Oracle BAM environment. (See the Worksheet for the recorded value.)

Example: `http://<machine name>.<domain name>:<port number> /ORACLEBAM/`

---

## Task 19-9: Verifying JMS Dependencies

To verify JMS dependencies:

1. Launch the Oracle BAM Start Page from the browsers URL box, entering the Oracle BAM web server URL (recorded on the Worksheet, or `http://<machine name>.domain name>/ORACLEBAM/`).

Example: `http://corpserver.peoplesoft.com/ORACLEBAM/`

2. Click the Administrator button.

The Oracle BAM Administrator appears.

3. In the drop-down list, select *Manage Enterprise Message Source Types*.
4. Click the link for the system's JMS server.

The JMS server can vary depending on the server vendor. If the server is running on WebLogic, the link is *BEA WebLogic Server*. The Enterprise Message Source Type definition appears.

5. Click the Edit link.

The Enterprise Message Source Type definition is now *editable*.

6. In the Startup parameters box, search for the name of the JMS jar file from the list of paths (for example, `weblogic.jar`).
7. Modify the path to the system JMS jar path.  
Example: `c:\bea\weblogic81\server\lib\weblogic.jar`
8. Click the Update button, and then click Continue.

---

**Note.** If there are multiple plan monitors on different host machines, ensure that the jar file appears on the specified path of each machine.

---

## CHAPTER 20

# Setting Up Oracle BAM for Integration with PeopleSoft Pure Internet Architecture

This chapter discusses:

- Understanding Oracle BAM Integration with PeopleSoft Pure Internet Architecture
- Loading PeopleSoft Dashboard Objects
- Configuring the PeopleSoft Content Reference for My Dashboard
- Setting the PeopleSoft Pure Internet Architecture Server Uniform Resource Index in Oracle BAM
- Setting the PeopleSoft Web Service Argument

---

## Understanding Oracle BAM Integration with PeopleSoft Pure Internet Architecture

This chapter provides instructions for installing and setting up Oracle BAM with Oracle's PeopleSoft Pure Internet Architecture and related components. This process consists of specifying the various URLs and paths for the connections between the Oracle BAM server and database, and the PeopleSoft application.

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on Oracle's PeopleSoft Customer Connection website to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

---

## Task 20-1: Loading PeopleSoft Dashboard Objects

This task installs plans to the repository as well as PeopleSoft Dashboard objects, such as dataobjects and reports, to the Oracle BAM Active Data Cache. The machine running this installation must have the directory c:\temp. All log files in this task are written to c:\temp\dash\_install.

---

**Note.** See detailed information about loading PeopleSoft Dashboard objects in install\_instructions.txt.

---

To load the PeopleSoft Dashboard objects:

1. Shut down Oracle BAM Event Engine service.
2. Open a DOS command window.
3. Change directories to the install folder <PS\_HOME>\setup\rts\_dashboard\install.
4. Copy the folder Y<PS\_HOME>\setup\rts\_dashboard\install\images to the Oracle BAM install folder (default location c:\OracleBAM\BAM).

5. If you are using a WebLogic JMS server, do the following:

- a. Enter this command:

```
install -install [-silent] JNDI_URL [DASH_DOMAIN]
```

- b. Provide a value for DASH\_DOMAIN as the machine name or IP address in which the Oracle BAM Active Data Cache service was previously installed. If omitted, the default is localhost.
- c. The Default value for JNDI\_URL is *t3://JMS SERVER NAME :8000*. For this parameter, specify the location of the JMS Server. For example: *install -install t3://JMS SERVER NAME:8000*
- d. Set the following parameters, as specified:

JNDI\_URL—JNDI URL for JMS messaging (no default).

DASH\_DOMAIN—the Dashboard domain to use to import (default is localhost).

---

**Note.** You can use the same install command to add the PTCDBADMIN user and update EMS.

```
install [-silent] -AddPTCDBAdmin [DASH_DOMAIN]
```

```
install [-silent] -EMSUpdate JNDI_URL [DASH_DOMAIN JMS_TOPIC JMS_TYPE CTX_FACTORY  
JMS_CONN_FACTORY]
```

---

6. If you are using another JMS server, do the following:

- a. Enter this command:

```
install [-silent] -install JNDI_URL) [DASH_DOMAIN  
JMS_TOPIC JMS_TYPE CTX_FACTORY JMS_CONN_FACTORY]
```

- b. Set the following parameters, as specified:

JMS\_TOPIC—The default is *psft.dsh.jms.topic.update*.

JMS\_TYPE—The type of JMS in use (default is *EMST.WEBLAGIC*).

---

**Note.** This information specifies the jar file that is required in the chapter “Installing and Configuring Oracle Business Activity Monitoring for Dashboard.”

---

CTX\_FACTORY—The name of the Context Factory to use for JNDI (default is *weblogic.jndi.WLInitialContextFactory*).

JMS\_CONN\_FACTORY—The JMS Connection Factory as registered in JNDI (default is *psft.dsh.jms.connection.factory*).

7. Run `install_samples` to install the sample data:

```
install_samples [DASH_DOMAIN]
```

---

**Note.** Adjust the sample data in the target objects that you imported with the sample data install.

---

8. Install data security filters *only* if you plan to implement business unit row-level security in the PeopleSoft application.

Use this command:

```
install_busecurity [DASH_DOMAIN]
```

9. Reboot all servers and restart all Oracle BAM services.

---

## Task 20-2: Configuring the PeopleSoft Content Reference for My Dashboard

This task specifies the location of the My Dashboard report for access from PeopleSoft CRM applications.

To configure the PeopleSoft content reference:

1. Log on to the Oracle BAM Start page using the URL for the BAM web server.
2. Click the Active Studio button.
3. Select the Shared Reports tab.  
A list of the shared reports in that folder appears.
4. Select the PeopleSoft Dashboard report.
5. Click the Copy Shortcut link in the Actions box.
6. Copy the ReportDef value in the Copy Shortcut – Web Page Dialog window.
7. In the PeopleSoft application, select PeopleTools, Portal, Structure and Contents.
8. Locate My Dashboard Content Reference and click the Edit link.
9. In the Additional Parameters box, replace the value for ReportID with the ReportDef value obtained from the PeopleSoft Dashboard report shortcut.
10. Click Save.

---

## Task 20-3: Setting the PeopleSoft Pure Internet Architecture Server Uniform Resource Index in Oracle BAM

This task specifies the location of the PeopleSoft application server so that users can access PeopleSoft application pages from a PeopleSoft Dashboard report.

To set up the PeopleSoft Pure Internet Architecture server Uniform Resource Index (URI) in Oracle BAM:

1. Return to the Oracle BAM Start page.
2. Select Architect.
3. Select Data Objects from the drop-down list box.
4. Select the System/Custom Parameters folder.
5. Click the Custom Parameters link.
6. In the right-side frame, click the Contents link.

The Contents page appears:

Row ID	Name	Value
2	Webserver URI	http://asad01.peoplesoft.com/psp/cr900dv/EMPLOYEE/CRM/c/
4	Case Path	CALLCENTER.RC_CASE_MAP.GBL?Page=RC_CASE&CASE_ID=
7	Order Capture Path	RO_ORDER_CAPTURE.RO_CAPTURE.GBL?Page=RO_FORM&Action=U&CAPTURE_ID=
8	Sales Opportunity Path	RSF_OPPORTUNITY.RSF_OPPORTUNITY.GBL?Page=RSF_OPP_DETAIL&Action=U&OPPORTUNITY_ID=
9	Interaction Path	RI_INTERACTION.RI_INTERACTION.GBL?INTERACTION_ID=
10	Inbound Email Path	RB_ERMS.RB_EM_IB.GBL?Page=RB_EM_IB89&Action=U&MCF_EMAIL_ID=

Contents page

7. Click the Edit Contents button.
8. For the Webserver URI parameter, click the Edit link located to the far right of the row.
9. Enter the value of the PeopleSoft Pure Internet Architecture URI and record that value in the Worksheet.

You can obtain the URL by accessing the PeopleSoft application and selecting the URL up to, but not including, the value of the page navigation. An example is the italicized portion of the URL:  
*http://corpsrver.peoplesoft.com/pxp/CRM/s/WEBLIB\_PTPP\_SC.HOMEPAGE.FieldFormula.IScript\_AppHP?pt\_fname=CR\_RBD\_COMMON&FolderPath=PORTAL\_ROOT\_OBJECT.CR\_SETUP\_CRM.CR\_PRODUCT\_RELATED.CR\_RBD\_COMMON&IsFolder=true*

10. Click the Update link to the right side of the row.

## Task 20-4: Setting the PeopleSoft Web Service Argument

This task requires the substitution of system node information into the Call PeopleSoft Web Service Argument and consists of these three basic steps:

- Obtain the URL of the web server's gateway listening connector from the PeopleSoft application.
- Obtain the name of the default local integration node of the PeopleSoft application.
- Copy the information from the two preceding steps into the web service argument using Oracle BAM Architect.

To set up the PeopleSoft Web Service Argument:

1. Obtain the URL of the gateway listening connector:
  - a. Sign in to the PeopleSoft application and select PeopleTools, Integration Broker, Configuration, Gateways.
  - b. Open the LOCAL gateway and copy the URL.  
 Example: `http://corpsrver.peoplesoft.com/PSIGW/PeopleSoftListeningConnector`
  - c. Paste the URL to a temporary text file and change *PeopleSoftListeningConnector* to *HttpListeningConnector*.

Record this name change on the Worksheet.



Example: `http://corpserver.peoplesoft.com/PSIGW/httpListeningConnector`

2. Obtain the name of the default local node:
  - a. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
  - b. Find the node in which the value for Local Node is *I* and the value for Default Local Node is *Y*.
  - c. Record this node name on the Worksheet.

Example: `PSFT_CR`

3. Log on to the Oracle BAM Start page using the URL for the BAM web server.
4. Select Architect.
5. Select *Data Objects* from the drop-down list box.
6. Select the System/Alerts folder.
7. Click the External Actions link.
8. In the right-side frame, click the Contents link.
9. Click the Edit Contents button.
10. Locate the parameter for Call PeopleSoft Web Service from the Argument column by clicking the Edit link located to the far right of the row.

Example of parameter:

`URL=@@PEOPLESOFT_GATEWAY@@,SOAPAction=http://peoplesoft.com/PT_CDB_ACTION_MSG/PT_CDB_WEB_SERVICE//@@PEOPLESOFT_LOCAL_NODE@@`

11. Replace `@@PEOPLESOFT_GATEWAY@@` with the modified URL from step 1.
12. Replace `@@PEOPLESOFT_LOCAL_NODE@@` with the name of the default local node from step 2.
13. Click the Update button.

Example argument: `URL=http://corpserver.peoplesoft.com/PSIGW/httpListeningConnector,SOAPAction=http://peoplesoft.com/PT_CDB_ACTION_MSG/PT_CDB_WEB_SERVICE//PSFT_CR`



## CHAPTER 21

# Setting Up PeopleSoft Single Signon for PeopleSoft Dashboard

This chapter discusses:

- Understanding PeopleSoft Single Signon for PeopleSoft Dashboard
- Enabling PeopleSoft Groups Getter
- Enabling PeopleSoft Single Signon
- Redirecting Assembly Versions
- Modifying Web Server Access

---

## Understanding PeopleSoft Single Signon for PeopleSoft Dashboard

This chapter provides instructions for setting up and enabling Oracle's PeopleSoft Single Signon for PeopleSoft Dashboard and related components.

With PeopleSoft Single Signon, after initial authentication by a PeopleSoft application server, you can navigate across PeopleSoft applications, accessing multiple application servers and databases without again entering your user ID or password.

After the first application server or node authenticates you, the system creates a web browser cookie that contains an authentication token unique to your session. Each server that is accessed thereafter in the session uses this cookie to automatically re-authenticate you.

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on Oracle's PeopleSoft Customer Connection website to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

See *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook*, "Understanding Security Integration: Single Signon."

---

## Task 21-1: Enabling PeopleSoft Groups Getter

To enable PeopleSoft Groups Getter:

1. Edit the OracleBAMActiveDataCache.exe.config file located on the Oracle BAM server machine. The default location is C:\OracleBAM\BAM\ . Add the following lines of code before </appSettings>.

---

**Important!** Do *not* copy the lines from this document to use in implementation. The code reproduced here is for reference only. For a copy-and-paste version of these code lines, use the text in the file SingleSignon.txt, provided in the *PS\_HOME* directory (example: c:\pt8.48\setup\rts\_dashboard\install).

---

```
<!--This setting enables the Peoplesoft specific GroupsGetter based on
/System/Security/User Group dataobject.-->
<add key="ADCGroupsGetterType" value="Oracle.BAM.Common.Security.Groups.Custom
GroupsGetter, Oracle.BAM.Common.Core"/>
<add key="CustomAuthenticationAssembly" value="PeopleSoft.BAM.Custom.Groups
Getter"/>
<add key="CustomGroupsGetterType" value="PeopleSoft.BAM.Custom.CustomGroups
Getter"/>
```

2. Copy PeopleSoft.BAM.Custom.GroupsGetter.dll, from the PeopleSoft PeopleTools installation (located in <PS\_HOME>\setup\Dashboard\ ) into the C:\OracleBAM\BAM and C:\OracleBAM\BAM\bin directories.
3. Verify the version of PeopleSoft.BAM.Custom.GroupGetter.dll by right-clicking the file name and selecting Properties and the Version tab.

Record the version number on the Worksheet.

4. Restart all Oracle BAM services.

---

**Note.** The PeopleSoft.BAM.Custom.GroupsGetter.dll requires that all Oracle BAM services be started using the network user ID that is the super user in the Active Data Cache (ADC). This is the network user ID used to install the system.

---

## Task 21-2: Enabling PeopleSoft Single Signon

To enable PeopleSoft Single Signon:

1. Open web.config, located on the Oracle BAM Start page application machine.
2. Set enableSessionState to *false*:

```
<pages validateRequest="false" enableSessionState = "false"/>
```

3. Add the following lines of code after <add key="LogToEventLog" value="false"/>:

---

**Important!** Do *not* copy the lines from this document to use in implementation. The code reproduced here is for reference only. For a copy-and-paste version of these code lines, use the text in the file SingleSignon.txt, provided in the *PS\_HOME* directory (example: c:\pt8.48\setup\rts\_dashboard\install).

---

```
<add key="AuthenticationModule" value="Oracle.BAM.Common.Security.Authenticati⇒
⇒
on.CustomAuthenticationModule, Oracle.BAM.Common.Core"/>
<add key="CustomAuthenticationAssembly" value="Peoplesoft.BAM.Custom.SignOn"/>
<add key="CustomAuthenticationTicketType" value="PeopleSoft.BAM.Custom.Custom
AuthenticationTicket"/>
<add key="CustomAuthenticationPriority" value="WARN"/>
<!-- This is the name of the cookie you want to use: -->
```

```

<add key="CustomTokenName" value="PS_TOKEN"/>
<add key="Credentials" value="Oracle.BAM.Common.Security.Authentication.Custom
TokenCredentials, Oracle.BAM.Common.Core"/>
<add key="ADCPrincipalType" value="Oracle.BAM.Common.Security.Custom.Custom
Principal, Oracle.BAM.Common.Core"/>
<add key="ADCIdentityType" value="Oracle.BAM.Common.Security.Custom.Custom
Identity, Oracle.BAM.Common.Core"/>
<!-- The following settings will be used to connect to the PS Web Server: -->
<add key="PSWebServer" value="http://web service machine with domain name and
port/PSIGW/HttpListeningConnector"/>
<add key="PSSOAPAction" value="http://peoplesoft.com/PT_CDB_SECURITY/PT_CDB_
WEB_SERVICE//Default Local Node"/>

```

---

**Important!** Ensure that you insert the actual install system information in place of the text for *web service machine with domain name and port number* (example: `http://corpserver.peoplesoft.com/PSIGW/HttpListeningConnector`) and *Default Local Node* (example: `value="http://peoplesoft.com/PT_CDB_SECURITY/PT_CDB_WEB_SERVICE//PSFT_CR"/`) in the last two lines.

---

See "Setting Up Oracle BAM for Integration with PeopleSoft Pure Internet Architecture," Setting the PeopleSoft Web Service Argument.

4. Copy `Peoplesoft.BAM.Custom.SignOn.dll` into the directories `C:\OracleBAM\BAM` and `C:\OracleBAM\BAM\bin` from provided in the *PS\_HOME* directory (example: `c:\pt8.48\setup\rts_dashboard\install`).
5. Verify the version of `PeopleSoft.BAM.Custom.SignOn.dll` by right-clicking the file name and selecting Properties and the Version tab.

Record the version number on the Worksheet.

---

## Task 21-3: Redirecting Assembly Versions

It is possible that the `PeopleSoft.BAM.Custom.GroupsGetter.dll` and the `PeopleSoft.BAM.Custom.SignOn.dll` versions are different from the installed Oracle BAM.

---

**Note.** To check the version of the installed Oracle BAM, right-click on `Oracle.BAM.Common.Core.dll` in Oracle BAM install directory (default location `c:\OracleBAM\BAM`), and selecting Properties and the Version tab.

---

If the versions are different, you must modify `OracleBAMActiveDataCache.exe.config` and `web.config`. If the versions are the same, skip this task.

To redirect assembly versions:

1. Open `OracleBAMActiveDataCache.exe.config` in the Oracle BAM install directory and locate:

```

<system.runtime.remoting>
<customErrors mode="off" />
</system.runtime.remoting>

```

- After these lines, add the following lines of code, replacing *new version number* with the version of the installed Oracle.BAM.Common.Core.dll (for example, 3.4.4923.0). Replace *old version number* with the PeopleSoft.BAM.Custom.GroupsGetter.dll (for example, 3.4.4812.0).

---

**Important!** Do *not* copy the lines from this document to use in implementation. The code reproduced below is for reference only. For a copy-and-paste version of these code lines, use the text in the file SingleSignon.txt, provided in the *PS\_HOME* directory.

---

```
<runtime>
<assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
  <dependentAssembly>
    <assemblyIdentity name="Oracle.BAM.Common.Core" publicKeyToken="public token
value" culture="neutral" />
    <!-- Assembly versions can be redirected in application, publisher policy, or
machine configuration files. -->
    <bindingRedirect newVersion="new version number" oldVersion="old version
number" />
  </dependentAssembly>
  <dependentAssembly>
    <assemblyIdentity name="Oracle.BAM.ADC.Common" publicKeyToken="public token
key" culture="neutral" />
    <!-- Assembly versions can be redirected in application, publisher policy, or
machine configuration files. -->
    <bindingRedirect newVersion="new version number" oldVersion="old version
number" />
  </dependentAssembly>
  <dependentAssembly>
    <assemblyIdentity name="Oracle.BAM.ADC.Api" publicKeyToken="public token key"
culture="neutral" />
    <!-- Assembly versions can be redirected in application, publisher policy, or
machine configuration files. -->
    <bindingRedirect newVersion="new version number" oldVersion="old version
number" />
  </dependentAssembly>
</assemblyBinding>
</runtime>
```

- Add the following lines of code to the web.config file in the Oracle BAM install directory, before the line </configuration>.

---

**Note.** In this step, replace *old version number* with the version number of PeopleSoft.BAM.Custom.SignOn.dll (for example, 3.4.4812.0). Replace *new version number* with the version of the installed Oracle.BAM.Common.Core.dll, as in step 2.

---

```
<runtime>
<assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
  <dependentAssembly>
    <assemblyIdentity name="Oracle.BAM.Common.Core" publicKeyToken=
"acdd5a747bafala8" culture="neutral" />
    <!-- Assembly versions can be redirected in application, publisher policy, or
machine configuration files. -->
```

```
<bindingRedirect newVersion="new version number" oldVersion="old version  
number" />  
</dependentAssembly>  
</assemblyBinding>  
</runtime>
```

4. Restart all Oracle BAM services.
5. Restart server processes:
  - a. Open IIS in the Microsoft Management Console (usually Start, Administrative Tools).
  - b. Right-click the IIS Admin Service and select Restart.

---

## Task 21-4: Modifying Web Server Access

To modify web server access for PeopleSoft Dashboard:

1. Open the Internet Information Services (IIS) Manager (Start, Settings, Control Panel, Administrative Tools).
2. Select the name of the machine that is running the Oracle BAM web server.
3. Select WebSites, Default Web Site, OracleBAM.
4. Right-click and select Properties.
5. Access the Directory Security tab.
6. Click the Edit button in the Authentication and access control group box.
7. Select the Enable anonymous access check box and clear the Integrated Windows authentication check box.  
If the inheritance override message appears, do *not* select a value, and click OK.
8. Restart server processes:
  - a. Open IIS in the Microsoft Management Console (usually Start, Administrative Tools).
  - b. Right-click the IIS Admin Service and select Restart.





## CHAPTER 22

# Testing Access to the PeopleSoft Dashboard

This chapter discusses:

- Verifying PeopleSoft Single Signon
- Verifying Access to Oracle BAM Active Studio
- Verifying Access to Oracle BAM Administrator
- Verifying Access to Oracle BAM Architect
- Verifying Access to Report Viewer
- Verifying Access to My Dashboard

---

### Task 22-1: Verifying PeopleSoft Single Signon

To verify that PeopleSoft Single Signon is properly configured, log on to PeopleSoft CRM and perform the following steps. If PeopleSoft Single Signon is properly set up, the system launches PeopleSoft Dashboard applications.

Verify the PeopleSoft Single Signon setup if an error occurs.

---

**Note.** Ensure that the browser popup windows are not blocked.

---

---

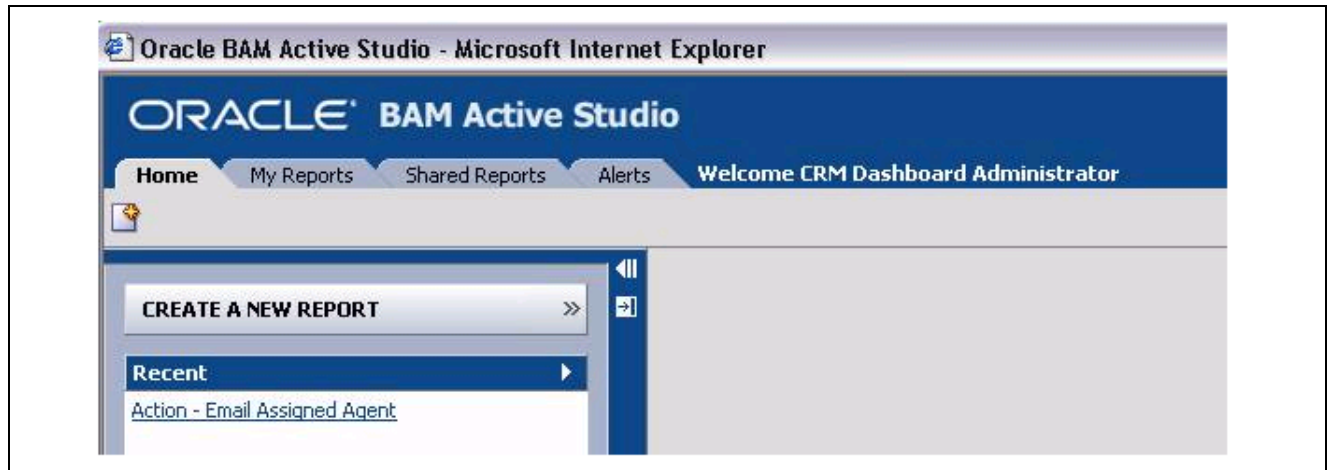
### Task 22-2: Verifying Access to Oracle BAM Active Studio

To verify Oracle BAM Active Studio access:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Select Set Up CRM, Product Related, Dashboard, Active Studio.  
Oracle BAM Active Studio launches in a new window.
3. Look for Welcome CRM Dashboard Administrator at the top of the Welcome page.  
The name Dashboard Administrator is the display name of the login.
4. Select the Shared Reports tab.  
The Shared Reports page appears.
5. On the Shared Reports page, select the PeopleSoft Dashboard report.  
Disregard PeopleSoft Dashboard Prompts by closing the dialog box.  
The PeopleSoft Dashboard report displays.

6. Click the Edit link.

The report becomes *editable*.



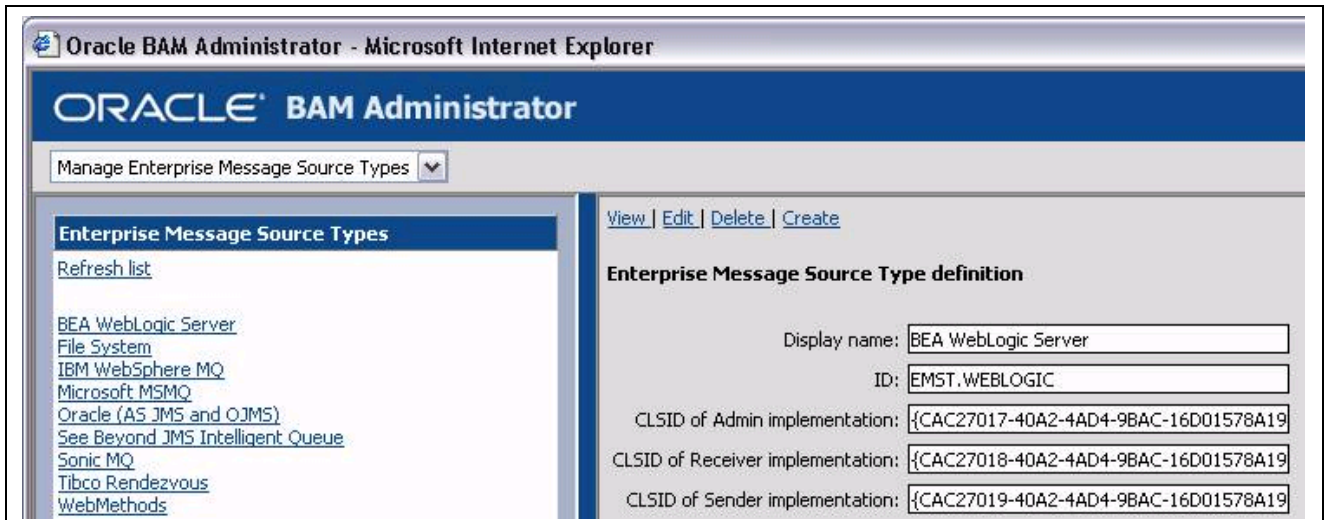
Oracle BAM Active Studio - Home

---

## Task 22-3: Verifying Access to Oracle BAM Administrator

To verify access to Oracle BAM Administrator from the PeopleSoft application:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Select Set Up CRM, Product Related, Dashboard, Administrator.  
The Oracle BAM Administrator launches in a new window.
3. Select *Manage Enterprise Message Source Types* from the drop-down list of the Administrator page.  
The left pane displays a list of system components that send message sources.
4. Click the WebLogic Server link.  
The server's Enterprise Message Source Type definition appears.
5. Click the Edit link.  
The Type definition becomes *editable*.

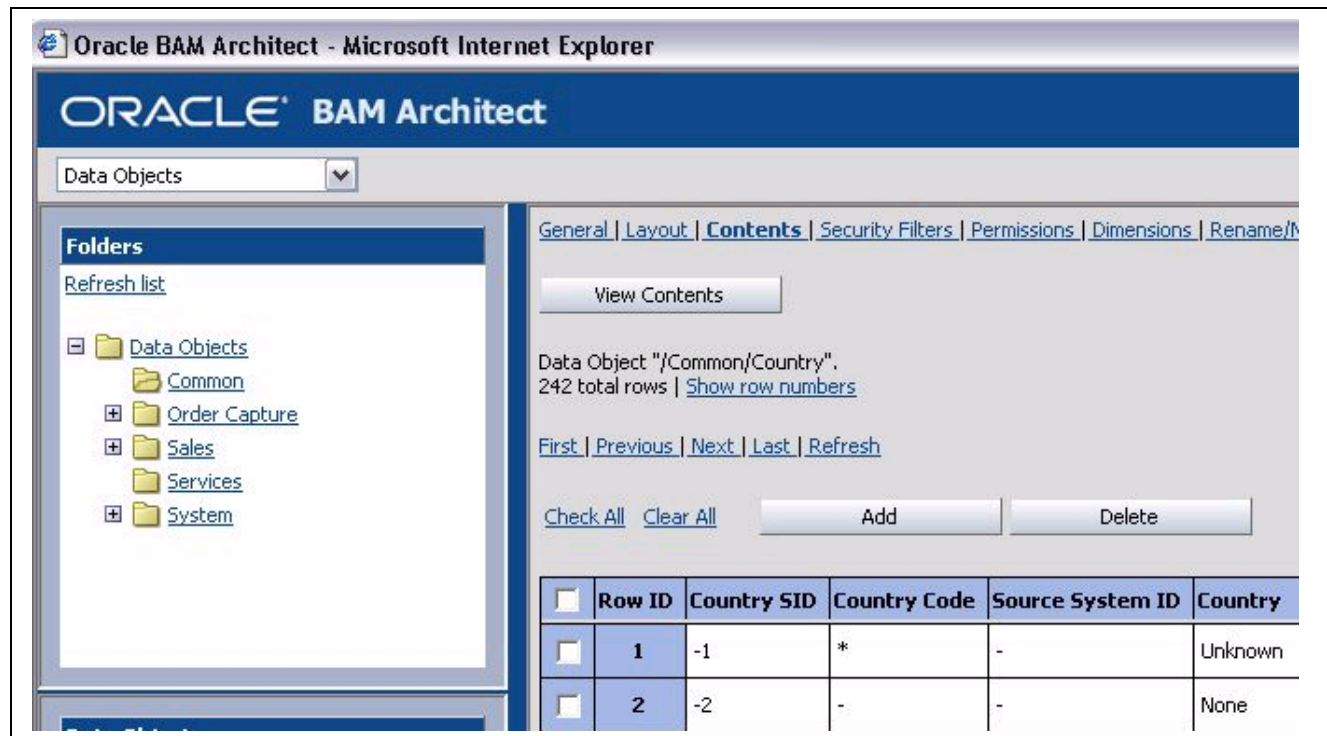


Oracle BAM Administrator - Manage Enterprise Message Source Types

## Task 22-4: Verifying Access to Oracle BAM Architect

To verify access to Oracle BAM Architect from the PeopleSoft application:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Select Set Up CRM, Product Related, Dashboard, Architect.  
The Oracle BAM Architect launches in a new window.
3. Select *Data Objects* from the drop-down list of the Oracle BAM Architect page.  
A list of data object folders appears in the left pane.
4. Click the Common folder.  
Data objects in the folder are listed below the folder box.
5. Click the *Country* data object.  
Details of the /Common/Country data object appear in the right pane.
6. Click the Layout link at the top of the right pane.  
The data object's field layout appears.
7. Click the Edit Layout button.  
The fields become *editable*.
8. Close any dialog box that appears for selection.



Oracle BAM Architect - Data Objects

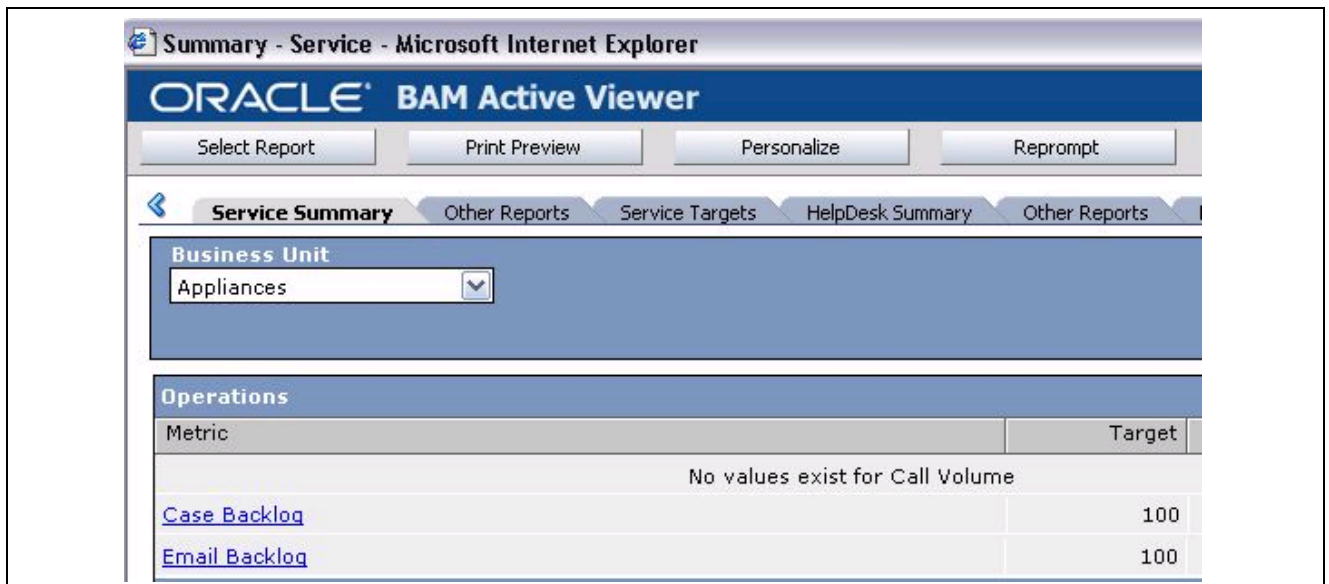
## Task 22-5: Verifying Access to Report Viewer

To verify access to Report Viewer from the PeopleSoft application:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Select Set Up CRM, Product Related, Dashboard, Report Viewer.  
The Report Viewer launches in a new window.
3. Click the Select Report button.
4. Select *Shared Reports* from the drop-down list in the Select a Report - Web Page Dialog box.
5. Select the *PeopleSoft Dashboard* report and click OK.

Disregard PeopleSoft Dashboard Prompts by closing the dialog box.

The PeopleSoft Dashboard report displays.



Oracle BAM Active Viewer - Service Summary

## Task 22-6: Verifying Access to My Dashboard

To verify access to My Dashboard from the PeopleSoft application:

1. Set up a content reference for My Dashboard as described in the chapter “Setting Up Oracle BAM for Integration with PeopleSoft Pure Internet Architecture,” task Configuring the PeopleSoft Content Reference for My Dashboard.
2. If you are not already logged on, log on to the PeopleSoft application as PTCDBADMIN.
3. In the left-hand navigation pane, click My Dashboard.

The Oracle BAM Active Viewer appears.

4. Close any dialog box that appears for selection.

The PeopleSoft Dashboard report is displayed. Refer to the previous task, Verifying Access to Report Viewer, for an example of what the system displays.



## CHAPTER 23

# Troubleshooting the PeopleSoft Dashboard

## Troubleshooting the PeopleSoft Dashboard Installation

Use the information in this chapter if you have problems with the PeopleSoft Dashboard installation.

Problem	Solution
<p>Server Error in '/' Application.</p> <p>Configuration Error</p> <p>Description: An error occurred during the processing of a configuration file required to service this request. Please review the specific error details below and modify your configuration file appropriately.</p> <p>Parser Error Message: It is an error to use a section registered as allowDefinition='MachineToApplication' beyond application level.</p> <p>This error can be caused by a virtual directory not being configured as an application in IIS.</p>	<ol style="list-style-type: none"><li>1. Launch IIS Manager.</li><li>2. Browse to the web site (that is, OracleBAM).</li><li>3. Right-click on OracleBAM and select Properties to access the properties for this site.</li><li>4. Access the Virtual Directory page.</li><li>5. Click the Create button in the Application Settings section.</li><li>6. Click OK.</li></ol>
<p>Cannot start Oracle BAM Enterprise Link Data Flow Service. Error message is: The Oracle BAM Data Flow Service service terminated with service-specific error 126 (0x7E). For more information, see Help and Support Center at <a href="http://go.microsoft.com/fwlink/events.asp">http://go.microsoft.com/fwlink/events.asp</a>.</p>	<ol style="list-style-type: none"><li>1. Select Start, Settings, Control Panel, Administrative Tools, Component Services, Computers, My Computer, DCOM Configuration, PeopleSoft Enterprise Link Data Flow Service Properties.</li><li>2. Select the Security tab and set all permissions to <i>Use Default</i>.</li><li>3. Restart the service.</li></ol> <p>If you can not restart, change all permissions to <i>Customize</i>. Click Edit and your account. Restart the service.</p>
<p>When running plans with the Run Forever check box selected on the EMS, the message is received but no data is written to the data object.</p>	<p>On the DFS machine, create a DWORD registry setting called AllowRegisterWithSplitters under the key /HKEY_LOCAL_MACHINE/Software/Sagent/DataMart/DC/ and set its value to 0. Restart the Data Flow Service and Plan Monitor after the change.</p>

Problem	Solution
When trying to view a report, the browser hangs, displaying "Opening..." in the status box.	<p>Install MSXML 3.0:</p> <ol style="list-style-type: none"> <li>Download the file in this folder to your c:\temp.  <a href="http://www.microsoft.com/downloads/details.aspx?FamilyID=c0f86022-2d4c-4162-8fb8-66bfc12f32b0&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?FamilyID=c0f86022-2d4c-4162-8fb8-66bfc12f32b0&amp;displaylang=en</a></li> <li>Launch the install by double-clicking on the file in Windows Explorer. Accept all of the defaults in the Install Wizard.</li> </ol>
Data Flow Service hangs.	On the DFS machine, create a DWORD registry setting called AllowRegisterWithSplitters under the key /HKEY_LOCAL_MACHINE/Software/Sagent/DataMart/DC/ and set its value to 0. Restart the Data Flow Service.
<p>Error while running the plan:</p> <p>MessageSourceReceiverImpl.HandleError-&gt;IMessageSourceReceiverOpen:          javax.na. Cannot instantiate class:          weblogicjndi.WLInitialContextFactory [Root exception is java.lang.ClassNotFoundException:          weblogicjndi.WLInitialContextFactory]</p>	In Oracle BAM Administrator, select the Manage Enterprise Message Sauce Types link. Select <i>BEA WebLogic Server</i> . Verify that the value displayed in the Startup Parameters box contains the correct path for Weblogic.jar. Restart Oracle BAM services.
What is the correct directory setting for IIS?	<p>To enable the PeopleSoft Pure Internet Architecture gateway to access Default Web Site/ORACLEBAM/Services /Icommand.asmx, enable Anonymous Access for Default Web Site/ORACLEBAM/Services.</p> <p>Also, remove Anonymous Access for Default Web Site/ORACLEBAM.</p> <p><b>Note.</b> These settings are valid only if PeopleSoft Single Signon is <i>not</i> implemented on the system.</p>
When a dimension table is cleared in PeopleSoft Dashboard, it clears the rows with "-1" and "-2" values as well, which will <i>not</i> be reloaded by a bulk load.	<p>You can restore "-1" and "-2" rows by re-importing the data object.</p> <ol style="list-style-type: none"> <li>Locate the xml file in the PeopleSoft Dashboard install directory &lt;PS home&gt;\setup\rts_dashboard\install\dataobject. For example, dataobject.Common.Country.xml.</li> <li>Copy the xml file into a temporary directory such as c:\temp.</li> <li>Shut down the Oracle BAM Event Engine.</li> <li>Open a DOS command window.</li> <li>Install the data object using ICommand. For example, ICommand cmd=import file="c:\temp\dataobject.Common.Country.xml" updatelayout="1" domain=&lt;machine name hosting the ADC service&gt; logfile="c:\temp\dataobject.Common.Country.log"</li> <li>Restart all Oracle BAM services.</li> </ol>



## APPENDIX A

# Using the PeopleSoft Dashboard System Parameter Worksheet

Use this worksheet to record system specifics for installation configuration tasks. Many tasks instruct you to record system values; record them here. Other tasks refer you to the values that you record here.

Parameter Name and Description	Where obtained	Task where needed	System Value	Example
Network user ID used to install Oracle BAM.	NA	Throughout, for Oracle BAM services restart.	(Case-sensitive)	PEOPLESOFT \AppInstaller
PS_HOME\	Task 16–2	Throughout.		C:\<PS_HOME>\
weblogic.jar path	Oracle BAM installation.	Task 19–5 Task 19–8		\bea\weblogic81\server\lib \weblogic.jar
Machine name of the Data Flow Service host	Oracle BAM installation.	Task 18–1		dfshost.peoplesoft.com
Host machines for plan monitors.	Oracle BAM installation.	Task 18–1		pmhost.peoplesoft.com
PeopleSoft application machine domain name.		Task 17–1		.peoplesoft.com <b>Note.</b> Include the initial period.
URL of the machine that hosts the Oracle BAM environment. http://<machine name>.<domain name>:<port number>/ORACLEBAM/	Oracle BAM installation	Task 17–4 Task 19–6 Task 20–6	(Case-sensitive)	http:// /corpserver.peoplesoft.com/ ORACLEBAM/
Installed PeopleSoft Dashboard Product Code.		Task 19–2		RBD
Web profile.	PIA setup	Task 19–1		PROD

Parameter Name and Description	Where obtained	Task where needed	System Value	Example
Authentication domain.	Task 191			.mydomain.com <b>Note.</b> Include the initial period.
JNDI_URL		Task 19–2		t3:/JMSHost.peoplesoft.com:8000
Gateway URL value http://<PIA webserver>:<port>	PIA Web server installation	Task 19–5 Task 20–4		http://corpserver.peoplesoft.com:9600
IP address or machine name of the machine that hosts the JMS Server.		Task 19–4		JMSHost.peoplesoft.com
JMS client messaging driver (a jar file).	JMS server	Task 19–8		weblogic.jar
My Dashboard Content Reference ReportID parameter value.	ReportDef value from task 20–2	Task 20–6		26
Network user ID that is the <i>super user</i> in the Active Data Cache (ADC). This is the user ID used to install the system.		Task 21–1	(Case-sensitive)	PEOPLESFT AppInstaller
PIA URI (PeopleSoft Pure Internet Architecture URI).		Task 20–4		http://corpserver.oracle.com/pxp/CRM/s/
Gateway listening connector.	Task 20–6	Task 20–6		http://corpserver.peoplesoft.com/PSIGW/httpListeningConnector
Default Local Node.	Task 20–6	Task 20–6 Task 21–2		PSFT_CR
version of PeopleSoft.BAM.Custom.GroupGetter.dll	Task 21–1			3.4.4812.0
version number of PeopleSoft.BAM.Custom.SignOn.dll	Task 21–2			3.4.4812.0
DASH_DOMAIN	Installation of Oracle BAM	Task 20–1		adchost.peoplesoft.com

This table lists the product codes for setting up PeopleSoft Pure Internet Architecture for integration with Oracle BAM and enabling parallel message processing.

See "Setting Up PeopleSoft Pure Internet Architecture for Integration with Oracle BAM," Enabling Parallel Message Processing.

PeopleSoft Dashboard Product	Product Code
Common Dashboard	<i>RBD</i>
Sales Dashboard	<i>SLD</i>
Order Capture Dashboard	<i>OCD</i>
Service Dashboard	<i>SDB</i>

## APPENDIX B

# Reviewing the PeopleSoft Dashboard Installed Component Default Locations

This table lists the locations of some application components that you may want to reference from time to time. This table also provides a column for locations that you may modify from the default.

Component	Default Location	Actual Location
log files for Dashboard object install	C:\temp\dash_install	
Oracle BAM Start Page application machine	C:\OracleBAM\BAM	
web.config	C:\OracleBAM\BAM	
SingleSignon.txt	<PS_HOME>...setup\rts_dashboard\install	
PeopleTools installation directory	<PS_HOME>...setup	
User projects in JMS server	C:\bea\user_projects\domains\peoplesoft1 under the WebLogic configuration	



## APPENDIX C

# Understanding PeopleSoft Dashboard System Architecture and Process Flow

This appendix discusses:

- Understanding PeopleSoft Dashboard and PeopleSoft CRM Process Flow
- Reviewing Process Flow from the PeopleSoft CRM Application to the PeopleSoft Dashboard
- Process Flow from the PeopleSoft Dashboard to the PeopleSoft CRM Application

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## Understanding PeopleSoft Dashboard and PeopleSoft CRM Process Flow

PeopleSoft Dashboard reporting depends on continuous access to sales, field service, and general business data to deliver accurate and relevant representations of current business activities. PeopleSoft CRM data provides the raw data for the PeopleSoft Dashboard reports, which are generated by Oracle BAM services based on PeopleSoft CRM data loaded into the Oracle BAM database. Oracle BAM subscribes messages from PeopleSoft CRM receiving, in real time, relevant PeopleSoft CRM data such as customer, contact center, sales, and order capture information.

This appendix describes the flow of the two messaging systems involved:

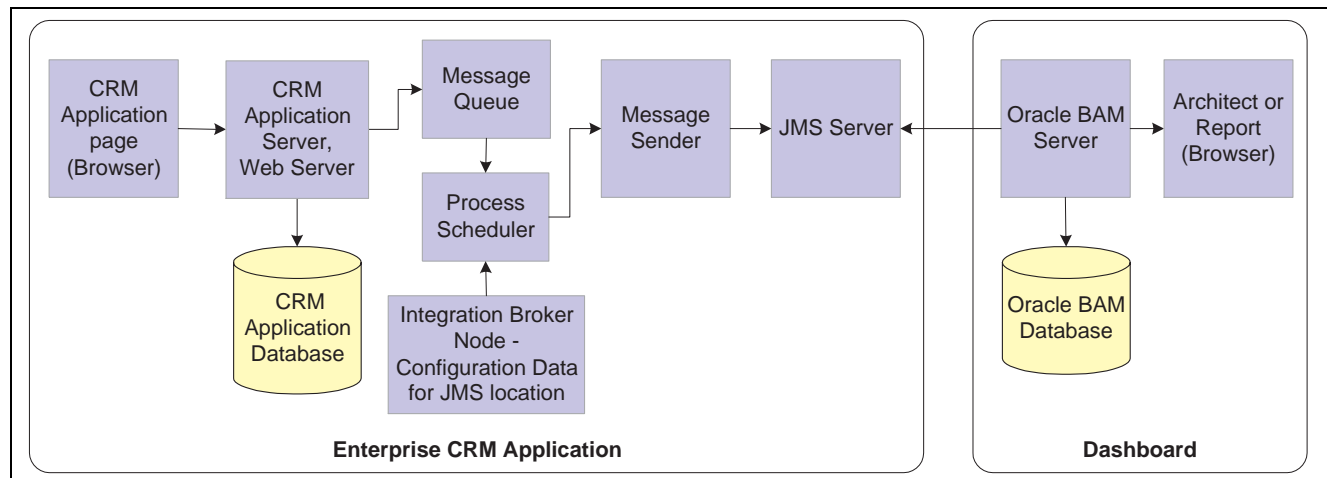
- PeopleSoft Enterprise CRM to Oracle BAM Dashboard
- Oracle BAM Dashboard to PeopleSoft Enterprise CRM

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## Reviewing Process Flow from the PeopleSoft CRM Application to the PeopleSoft Dashboard

When a data object in the PeopleSoft CRM Application page changes, as when a support representative updates a case and saves it, the PeopleSoft CRM Web Server passes the newly submitted data to the PeopleSoft CRM Application Server.

This diagram illustrates the components involved in the messaging from a PeopleSoft CRM application to PeopleSoft Dashboard.



Messaging from PeopleSoft CRM application to PeopleSoft Dashboard

The PeopleSoft CRM Application Server responds by:

- Saving the changed data to the PeopleSoft CRM Application Database.
- Packaging key data in a message and placing it in the Message Queue.

The Process Scheduler processes the message in the queue, using configuration data stored in the PeopleSoft Integration Broker Node definition to determine the target URL of the JMS Server.

The Process Scheduler invokes the Message Sender, which sends the message to the JMS Server.

The Oracle BAM Plan Monitor service, which runs on the Oracle BAM Server, obtains the JMS Server location from the Enterprise Message Source (EMS) definitions. Plan Monitor service fetches messages from the JMS Server for each monitored plan.

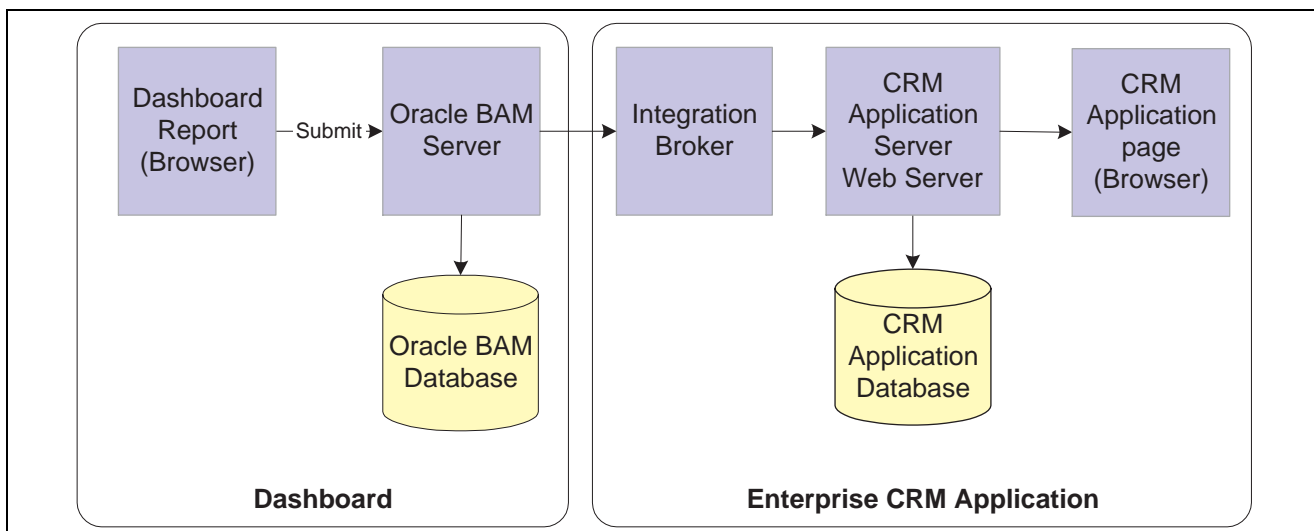
The Active Data Cache (ADC) service running on the Oracle BAM Server updates the appropriate data objects in the Oracle BAM database.

The help desk manager, opening a PeopleSoft Dashboard report for case lifecycles, views data that includes the just-updated case. Users can also view real-time data in Oracle BAM Architect.

## Process Flow from the PeopleSoft Dashboard to the PeopleSoft CRM Application

After studying the weekly case activity PeopleSoft Dashboard Report, a help desk manager shifts case assignments from one support representative to another. The agents involved will be notified of their reassignments by the PeopleSoft CRM HelpDesk workflow function. The messaging system performs the task of the required data transfer from the PeopleSoft Dashboard to the PeopleSoft CRM application.

This diagram illustrates the components involved in the messaging from PeopleSoft Dashboard to PeopleSoft CRM application.



Messaging from PeopleSoft Dashboard to PeopleSoft CRM application

Submitting the new case assignments causes the ADC service running on Oracle BAM Server to insert rows into the data object stored in the Oracle BAM Database. An alert that is set to watch the data object is triggered, and the Event Engine service running on the Oracle BAM Server sends a message to the PeopleSoft Integration Broker in the PeopleSoft CRM application side.

The PeopleSoft Integration Broker triggers the execution of message subscription code on the PeopleSoft CRM Application Server, updating the appropriate objects in the PeopleSoft CRM Application Database and initiating changes to the workflow. New entries in the worklists of the two agents (viewed from a PeopleSoft CRM Application page) inform the agents of their changed case assignments.





## APPENDIX D

# Reviewing Tablespaces and Parameters for PeopleSoft CRM Online Marketing

This appendix discusses:

- Understanding PeopleSoft Online Marketing Tablespaces
- Reviewing the PeopleSoft CRM Customer Data Model Tablespaces
- Changing Parameter Values
- Reviewing Parameter Descriptions
- Communication Port List for PeopleSoft OLM Components

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## Understanding PeopleSoft Online Marketing Tablespaces

This table contains the PeopleSoft Online Marketing 9 tablespace names and a description of each tablespace.

OLM 9 Tablespace Name	Tablespace Description
RYAPP	General tablespace that stores most of the application-specific data.
RYWORK	Tablespace for OLM dedup tables that Mailcaster uses to prepare broadcast emails on Oracle.
RYLARGE	Tablespace for the following tables: <ul style="list-style-type: none"><li>• PS_RY_EM_DAY_CNT_1</li><li>• PS_RY_EM_DAY_CNT_2</li><li>• PS_RY_FREQ_CNT</li><li>• RY_FLOW_INST</li><li>• RY_DOC_SER</li><li>• Document transaction tables</li></ul>

OLM 9 Tablespace Name	Tablespace Description
RYLARG1	Tablespace for indexes on the following list of tables that contain email transaction history data: <ul style="list-style-type: none"> <li>• PS_RY_BEMAIL_LOG</li> <li>• PS_RY_EMAIL_BOUNCE</li> <li>• PS_RY_EXP_EM_LOG</li> <li>• PS_RY_SMAIL_LOG</li> <li>• PS_RY_EMAIL_DISC</li> <li>• PS_RY_OPENMAIL_LOG</li> <li>• PS_RY_VC_EM_IMPR</li> </ul>
RYLARG2	Tablespace for the following list of tables that contain web transaction history data: <ul style="list-style-type: none"> <li>• PS_RY_WEB_LOG</li> <li>• PS_RY_VC_WEB_IMP</li> </ul>
PSINDEX	Tablespace for indexes of all OLM tables on Oracle.

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## Reviewing the PeopleSoft CRM Customer Data Model Tablespaces

In addition to the specific tablespaces that PeopleSoft Online Marketing uses, some of the tablespaces within the PeopleSoft CRM Customer Data Model must be resized to handle the large growth of individuals and organizations. The following table lists the tablespaces that you must resize:

Tablespace Name	Tables Affected by OLM Growth	Comments
RBLARGE	RBLARGE related tables affected by OLM growth: <ul style="list-style-type: none"> <li>• PS_CM</li> <li>• PS_BO_CM</li> <li>• PS_BO_CM_USE</li> <li>• PS_BO_ROLE</li> <li>• PS_BO_REL</li> <li>• PS_BO</li> <li>• PS_BO_MKT_DATA</li> <li>• PS_BC</li> <li>• PS_BO_NAME</li> <li>• PS_BO_TRIGGER</li> <li>• PS_RD_PERSON</li> <li>• PS_RD_COMPANY</li> </ul>	Other tables use this tablespace; however, PeopleSoft OLM transactions affect the RBLARGE tablespace significantly.
PSINDEX	PSINDEX related tables affected by OLM growth: <ul style="list-style-type: none"> <li>• PS_CM</li> <li>• PS_BO_CM</li> <li>• PS_BO_CM_USE</li> </ul>	
RABLARGE	RABLARGE related tables affected by OLM growth: <ul style="list-style-type: none"> <li>• PS_BO_BASIC_IND</li> <li>• PS_BO_BASIC_ORG</li> </ul>	
RABINDEX	RABINDEX related tables affected by OLM growth: <ul style="list-style-type: none"> <li>• PS_BO_BASIC_IND</li> <li>• PS_BO_BASIC_ORG</li> </ul>	

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**Note.** Ensure that each of the tablespaces in the preceding tables are properly sized and active.

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## Task D-1: Changing Parameter Values

If you change the value of any parameters from the PeopleSoft Pure Internet Architecture Settings page, or you change and overwrite the value of Settings in any of the components configuration file (for example, DES.config, MCR.config, WDG.config, and ERP.config), you must stop and restart the components that are affected by the parameter before the new settings can take effect.

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**Note.** Script files for local use must be used to configure the email response processor. The syntax of the scripting language is covered in the Email Response Processors Documentation.

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## Task D-2: Reviewing Parameter Descriptions

The following two tables describe the PeopleSoft OLM parameters. The first table includes parameters for DES, Mailcaster, and All. The second table includes parameters for Watchdog. The parameters are in alphabetical order within each table. These tables also indicate the PeopleSoft OLM component that uses each parameter.

**Note.** If you change the value of any parameters, you must stop and restart the components that are affected by the parameter before the new settings can take effect.

Parameter Value	Components	Description
agingCacheLifeSpan	DES	For internal use only.
agingObjectAgeLimitMins	DES	For internal use only.
allowOwnRmiRegistry	Mailcaster	Start own RMI registry if none is currently running.
automaticMailJobRecovery	Mailcaster	<p>Specifies whether the Mailcaster tries to automatically recover a running job that has not been updated for a specific period of time.</p> <p>If set to <i>false</i>, the Mailcaster does not attempt to recover the mail job, and the administrator must do so manually by stopping and starting the job using the Control Center.</p> <p>If set to <i>true</i>, the Mailcaster recovers the job, which can result in the sending of duplicate emails. The Mailcaster uses the mail jobs recovery log table to reconstruct the job.</p> <p>However, because there is a gap between sending the mail and writing to the recovery log, it is possible that one duplicate message will be sent per send mail thread.</p> <p>The default value is <i>true</i>.</p>
broadcastRequestDESTimeout	DES	Specifies the timeout in milliseconds for broadcast requests.
bulkMailerDropDedup	Mailcaster	Specifies whether to drop the Dedup table after mail job has completed successfully. The default is <i>true</i> .
bulkMailerMaxErrorRetryAttempts	Mailcaster	Specifies the number of attempts that the Mailcaster will make to connect to the SMTP server before raising an error. (Note that the misspelled word <i>Attempts</i> must be entered as shown in the parameter value column of this table.)

Parameter Value	Components	Description
cgiProgramPath	All	Specifies the path of the web server gx.cgi program. The default is DCS. Also used by Peoplesoft OLM to tell the Campaign Server to clear cache, and to generate the Dialog Link Report.  To ensure that the path information is read correctly at startup, you should set this value in the configuration files, rather than using the Settings feature in the Online Marketing Client.
clearCacheGracefully	DES	Specifies a method to clear cache.
clearCachePerObject	DES	Specifies a method to clear cache deeply.
clearCacheThreads	DES	Specifies the number of threads that clear cache in the background.
clearCacheTimeoutSecs	DES	Specifies the time in seconds for a clear cache request to time-out.
clearCacheWait	DES	Specifies the time in milliseconds to wait for current clear cache requests to finish.
companyBasicsProfileName	DES	For internal use only.
contactBasicsCompanySysIdElementName	DES	For internal use only.
contactBasicsProfileName	DES	For internal use only.
ConnectId	All	Specifies the DB User Name.
ConnectPswd	All	Specifies the DB User password.
contentTransferEncoding	Mailcaster	Allows the email header to support 8bit characters. The default for email header is 7bit. To change the default, add this parameter through the Online Marketing Client in Settings as: <i>contentTransferEncoding=8bit</i> .
createObjectsInExternalThread	DES/ERP	Specifies to create and destroy Jolt Connection in a separate thread.
dialogmoverOperationTimeout	DES	Specifies the Dialog Mover execution timeout. (60*1000=i minute)
dedupDisablePageLockMSSQL	DES	Avoids page locking on MSSQL while deduping (experimental).
debugFileSeverityThreshold	All	Specifies the debug log error severity level (not including trace lines).
dbServerURL	All	Specifies the path or address that the PeopleSoft Online Marketing components use to connect to the database, for example:  <ul style="list-style-type: none"> <li>MSSQL: jdbc:sqlserver://host:port;DatabaseName=instance;sql70=true;charset=Cp1252</li> <li>ORACLE: jdbc:oracle:thin:@host:port:instance</li> <li>DB2UDB: jdbc:db2://host:port/instance</li> </ul>

Parameter Value	Components	Description
dbVendor	All	Specifies the database that you are using, for example: <ul style="list-style-type: none"> <li>• MSSQL</li> <li>• ORACLE</li> <li>• DB2UDB</li> </ul>
dedupAllowDirtyReadMSSQL	DES	<p>(<i>MSSQL only</i>) Specifies whether to allow dirty read on the PS_RY_BASIC_IND table during de-duping. The default value is <i>false</i>.</p> <p>When the parameter is set to <i>false</i>, the deduping process gets clean data, but can block other components from updating the basic individual table.</p> <p>When the parameter is set to <i>true</i>, the deduping process gets dirty data, allowing a higher level of concurrency on the basics individual table.</p>
dedupIndexSpace	DES	Specifies the database tablespace in which the dedup index tables are created. This parameter can be used to improve the performance of the system. Contact your database administrator for more information.
dedupPickRecordWithMaxCompanySysID	DES	Takes effect only when de-duping on BO_ID (Unique System ID) and at least one of the audiences is of type Contact. The default value is <i>true</i> .
dedupTableSpace	DES	Specifies the database tablespace in which the dedup tables are created. This parameter can be used to improve the performance of the system. Contact your database administrator for more information.
defaultDateFormat	All	Default Date format with values such as <i>DD/MM/YYYY</i> .
defaultProcessSize	DES	Specifies the maximum number of actions that can be created in the Reach or Response side of the process tree. The default value is <i>200</i> .
DefaultTimeFormat	All	Specifies the Default Time format. Possible values are <i>HH:MM</i> or <i>HH:MM AM/PM</i> .
defaultURLBase	DES/Mailcaster	Specifies the base of the URL that the Campaign Server and Mailcaster adds to all links. The format is: defaultURLBase=<URL of online dialog webserver>
delayForDBCheck		<p>Specifies the number of seconds DES waits before attempting a database connection, to prevent starting before the database is available.</p> <p>This parameter applies only at database initialization. The default is <i>15 seconds</i>.</p>
directURLBase	DES	Specifies the direct URL of the DES ( <a href="http://&lt;hostname&gt;:port">http://&lt;hostname&gt;:port</a> )
domainName	DES/Mailcaster	Specifies the domain name that identifies your site on the internet. For PeopleSoft OLM, this is <i>yourdomain.domain</i> .

Parameter Value	Components	Description
doNotEMailDefault	DES/Mailcaster	Specifies the default value to be stored in the people profile (in the Do not email field) when a new contact record is added. If it is <i>true</i> , then new contacts will not be contacted through bulk email. If it is <i>false</i> (the default), then contacts can be contacted. This default value can be overridden by the dialog process or respondent input.
doNotEMailProfileElementName	DES/Mailcaster	For internal use only.
emailAddressProfileElementName	DES	Specifies the name of the Email Address profile field in the Individuals.People profile. The default value is <i>Email</i> .
errorFileSeverityThreshold	All	Specifies the error log severity level.
eventWireGifFileName	DES	Customize the DES default 1x1 clear gif file.
extensionsDir	DES/Mailcaster	Specifies the directory where the Live Extension servlet jar files exist.
extensionTimeout	DES	Specifies the extension execution timeout.
heartbeatInterval	DES	Lifecycle management heartbeat interval.
https	DES	Indicates whether connections to the Control Center must be secure. If you want to require secure connections, you must set <i>https=On</i> . Any other value, such as <i>on</i> using a lowercase <i>o</i> indicates that a secure connection is not required.
httpSessionTimeoutMins	DES	Specifies the logged-in session time out in minutes in the range of 1 to 60 mins.
jpmWaitForShutdownInMinutes		Specifies the delay from the last action when the Java Process Monitor will shut itself down.
isDebugOutputToHTMLEnabled	DES	For internal use only.
jmsContextFactory	DES	JMS Context Factory.
jmsProvider	DES	Specifies the vendors of web server software. Possible values are: <i>BEA-WLS</i> or <i>IBM-WAS</i>
jmsProviderUrl	DES	JMS Provider URL
jmsQueueConnection	DES	JMS Queue Connection.
jmsServiceLocator	DES	JMS Service Locator.
jmsTopicConnection	DES	JMS Topics Connection.
jmsUser	DES	JMS User.
jmsUserPassword	DES	JMS User Password.
jdbcDriver	DES/Mailcaster	<p>This is the JDBC driver that the PeopleSoft OLM components use to access the database. Default values are:</p> <ul style="list-style-type: none"> <li>• MSSQL: com.microsoft.sqlserver.jdbc.SQLServerDriver</li> <li>• ORACLE: oracle.jdbc.driver.OracleDriver</li> <li>• DB2UDB: com.ibm.db2.jcc.DB2Driver</li> </ul>

Parameter Value	Components	Description
jobRecoveryExpireInHours	Mailcaster	Specifies the time period, in hours, after which mail jobs will not be recovered. The default is 96 and the parameter must be set to a value greater than 0. This parameter is useful in cases with time-sensitive audiences or time-sensitive content for a mailing.
joltSessionRecycleCount	DES	Specifies the number of requests for which the Jolt NetSession will be reused before it closes. After a Jolt NetSession closes, a new Jolt NetSession will be created as necessary. The default value is 0, meaning that Jolt NetSessions never expire.
largeJobOnly	Mailcaster	If the mailcaster is a large mailcaster and the largeJobOnly value is set to <i>true</i> , then the mailcaster will only pickup large jobs. The default is <i>false</i> (should be in per mailcaster config file).
localHostName	DES/Mailcaster	Specifies the host name of the machine where Mailcaster is running and is used to communicate with the SMTP mail servers.
logBaseName	All	Specifies the prefix for log and error files, for example DES, WDG, and so on (should be in per application config file).
logPath	DES/Mailcaster	Specifies the directory for the log file. The default is the current working directory.
numberFrequencyCheckThreads	Mailcaster	Specifies the number of threads to use to process frequency counter checking.
numberRenderingThreads	Mailcaster	Specifies the number of rendering threads.
mailCasterMaxGettransactionRetry	Mailcaster	Specifies the number of times to attempt to get a DB transaction (connection) before giving up.
maxBulkMailMessagesPerHour	Mailcaster	Specifies the number of emails each Mailcaster sends per hour when PeopleSoft OLM components share a mail server with other users. This enables you to limit the number of emails each Mailcaster sends per hour. For example, if you have 3 Mailcasters and you set this parameter to 100, each Mailcaster will send out a maximum of 100 messages per hour for a total maximum of 300. The default setting is 0, which means NO limit.
maxDESInstances	DES	Specifies the number of DES servers in the cluster.
maxMailQueueSize	Mailcaster	Specifies the size of the mailcaster internal message queue.
maxFrequencyCheckQueueSize	Mailcaster	Specifies the maximum size that the queue of messages awaiting the frequency counter checking can grow to.
maxJobSize	Mailcaster	Specifies the maximum size for a child mailjob. The default value is 10000, and the parameter must be set to a value greater than that set for minJobSize.
maxLogFileCount	DES/Mailcaster	Specifies the maximum number of log files to create. The default setting is 10.
maxLogFileSize	DES/Mailcaster	Specifies the maximum size of the log files in bytes. The default setting is 10 MB.



Parameter Value	Components	Description
maxPooledGenericThreads	DES	Specifies the maximum number of Generic Threads that are used by Scheduler and Broadcaster.
maxRenderMailQueueSize	Mailcaster	Specifies the maximum number of messages in the rendering queue.
maxRetriesForDBCheck	DES	Specifies the number of times DES tries to establish connection with the database, to prevent it from starting before the database is available. This parameter applies only at database initialization. The default is 8 times.
maxSendMailQueueSize	Mailcaster	Specifies the maximum number of mails in the send queue.
maxThreads	DES	Specifies the maximum size of the Live Extention pool.
maxUploadSize	DES	Specifies the maximum file upload size.  You should consult your web server documentation when setting maximum file size, to ensure that the settings are compatible between the web server and PeopleSoft OLM. If the web server settings are significantly higher than those in PeopleSoft OLM, performance can be affected.
minJobSize	Mailcaster	Specifies the minimum size for a child mailjob. The default value is 2000, and the parameter must be set to a value greater than 0 and less than maxJobSize.
OMKDESDestination	DES	Specifies the JMS Destination (TOPIC/QUEUE) for DES.
orgRoleTypeIdProfileElementName	DES	Specifies the name of the organization role type profile element in base language.
percentageJobSize	Mailcaster	Specifies the percentage of a large (parent) job to use as a child job size. The default value is 3 and the parameter must be set to a value greater than 0.
pollingInterval	Mailcaster	Specifies in minutes the frequency with which the Mailcaster checks the mail job queue. The default setting is 1.
preloadCampaign	DES	Specifies the names of dialogs to be loaded into memory at server startup, thus reducing the time the customer must wait to view the dialog. The format is:  <code>preloadCampaign=Dialog1,dialog 2,Dialog33 for Staging</code>  You can specify multiple dialogs by separating their names (including spaces) with commas. Do <i>not</i> include spaces before or after commas.

Parameter Value	Components	Description
psAppServerURL	DES	Specifies the URL of the PeopleSoft Application Server and JOLT port where publish/subscribe is enabled.  For failover, you can use a comma-separated list. For example: //mymachine1:9000,//machine2:9050  This parameter is usually set in the PeopleSoft Online Marketing Client Settings.
psIBLocalNode	DES	Specifies the name of the PeopleSoft Integration Broker default local node for the Application Server.
psIBLocalNodePassword	DES	Specifies the password (if any) for the PeopleSoft Integration Broker local node. The value is encrypted in the configuration file.
psJoltSessionCount	DES	Specifies the maximum number of JOLT sessions. The DES will pre-allocate half at startup.
psOperatorID	DES	Specifies the PeopleSoft user ID. Select a user ID with the PeopleSoft Administrator role, such as the OLM user.
psOperatorPassword	DES	Specifies the PeopleSoft user password.
psPIAServerURL	DES	Specifies the PeopleSoft CRM PIA Server URL:  http:// <PIA web server:port>
psPIAServerWebsiteName	DES	Specifies the PeopleSoft CRM PIA server website name.
psToolsRel	DES	Specifies the PeopleSoft PeopleTools version number. The default value is 8.48, which is specified in the PeopleSoft Online Marketing Client Settings.
restoreCheckInterval	DES	Specifies the interval in milliseconds between checks to see whether an object is fully restored or not. The default is 100 ms.
rmiPort	Mailcaster	Specifies the port on which RMI can be contacted. The default is 1099.
roleTypeIdProfileElementName	DES	Specifies the name of the individual role type profile element in base language.
schedulerFailInterval	DES	Specifies the amount of time, in hours, the scheduler should wait before assigning a FAILED status to a mail job. The default is 24 hours. If a job is likely to take longer than 24 hours to dedup, this parameter should be added to the DES.config file with a longer duration.
schedulerServiceNumberOfJobs	DES	Specifies the number of jobs that can be run per scheduler wake-up.
schedulingTimeoutMins	DES	Specifies in minutes the time the scheduler recovers the timed out event and re-sends for processing. The maximum value is 30 mins and the minimum is 5 mins. If any event is being scheduled, that is, the state is SCHG (scheduling) for more than the set value, the scheduler recovers this event and re-sends for processing.

Parameter Value	Components	Description
signatureAlgorithmKey	DES/Mailcaster	Specifies the encryption algorithm key used for the magic number. The key must be between 15 and $2^{63}$ digits. If the key is not set, or is set incorrectly, a default value is used.
signatureLength	DES	Specifies the length of the signature in bits, from 0 to 48 (0 = no signature). The default length is 48.
smallAudienceThreshold	DES	Specifies a threshold number of contacts in an audience. Below this number, PeopleSoft OLM uses a small Mailcaster to send email. The default is 100.
smallAudienceThreshold	Mailcaster	Specifies the threshold for the Mailcaster job priority. If the maxJobSize is larger than the smallAudienceThreshold, the Mailcaster will work on large jobs as its first priority.  If the maxJobSize is less than or equal to the smallAudienceThreshold, the Mailcaster priority will be small jobs.
smallJobOnly	Mailcaster	Specifies whether the Mailcaster will only try to process small jobs (jobs below the threshold set by the smallAudienceThreshold parameter).  If set to <i>True</i> , the Mailcaster will only process small jobs.  This parameter is ignored if the maxJobSize parameter is greater than or equal to the smallAudienceThreshold parameter.

Parameter Value	Components	Description
smtpServerNames	DES/Mailcaster	<p>Specifies a semicolon-separated list of SMTP mail servers that are used by the PeopleSoft OLM server and the Mailcaster and contains the following format:</p> <pre>hostName[:portNumber] [:threads=n][;...]</pre> <p>The normal SMTP port number is used if <code>portNumber</code> is not provided. <code>threadCount</code> is used only by the Mailcaster to determine how many internal threads will be used to send mail to smtp server.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li><code>mail1.pscrm.com</code> Uses one mail server on mail1.pscrm.com</li> <li><code>mail1.pscrm.com;mail2.pscrm.com</code> Uses two mail servers, one on mail1.pscrm.com and the other on mail2.pscrm.com</li> <li><code>mail1.pscrm.com:1025;mail2.pscrm.com:1025</code> Uses two mail servers on port 1025, one on mail1.pscrm.com and the other on mail2.pscrm.com</li> <li><code>mail1.pscrm.com:threads=5</code> Uses five connections to mail1.pscrm.com.</li> <li><code>mail1.pscrm.com:25:threads=5;mail2.pscrm.com:25:threads=3</code> Uses five connections to mail1.pscrm.com on port 25 and three connections to mail2.pscrm.com on port 25.</li> </ul>
smtpThreadPollingInterval	Mailcaster	Specifies in minutes how long the Mailcaster threads wait before reconnecting to the SMTP server after being disconnected. The default is 10 minutes.
threads	Mailcaster	Specifies the number of send mail threads.
transactionPoolDelayInMinutes	DES/Mailcaster	Specifies how often the DES checks the thread pool for stale database connections (value in minutes). The default is 5; allowable values are 1 through 60.
transactionPoolMaxSize	DES/Mailcaster	Specifies the maximum number of database connections to be pooled. The number of connections may exceed this value, but those connections will not be pooled. The default is 20; allowable values are 0 through 200. Setting this value to 0 means unlimited pool size.

Parameter Value	Components	Description
transactionPoolMinSize	DES/Mailcaster	Specifies the initial database connection pool size. This value must be less than connectionPoolMaxSize. The default is 1; allowable values are 0 through 199.
transactionPoolStaleInMinutes	DES/Mailcaster	Specifies the amount of time idle connections should remain in the pool (value in minutes). The default is 20; allowable values are 0 through 1440 (24 hours).
trimSpaces	DES	Allows the leading and trailing blanks to be stripped from text fields. The parameter applies to all text fields—either all or none are stripped. Valid values are <i>true</i> and <i>false</i> ; the default value is <i>true</i> .
uploadInMemorySize	DES	Specifies the location of temporary storage for uploaded files.
uploadTempStorage	DES	Sets the size threshold beyond which upload files are written to the temporary disk storage location.
useAutoUndoOracle	DES/Mailcaster	Boolean flag to indicate whether the Oracle database is in automatic undo mode or not. The default value is <i>false</i> .
useJoltRetry	DES	Tells netSession API to use Jolt retry. The default value is <i>false</i> . We recommend that you do not modify this value.
HAS_FIREWALL	Mailcaster	If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the mailcaster's RMI server object to listen on a specific port. This parameter must be set to <i>true</i> to add into the MCR.config file.
FIREWALL_PORT	Mailcaster	If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the mailcaster's RMI server object to listen on a specific port. This parameter must be set to add into the MCR.config file.

Parameter Value	Components	Description
daysInThePast	Watchdog	The period of time Watchdog should monitor failed or stopped jobs and events
debug	Watchdog	Enable watchdog specific debugging. Values are <i>YES</i> or <i>NO</i> .
defaultHostName	Watchdog	The name of the machine Watchdog is running on.
defaultRecipient	Watchdog	Recipient to use when testing mail server.
defaultSender	Watchdog	The Sender to user on Watchdog mail reports.
demoCampaignMagicNumber	Watchdog	The magic number of the Online Marketing Dialog to use as test that the DES is running properly. This should include the "p=" along with the magic number. A good demo campaign contains a landing page and a final page.
domainName	Watchdog	The domain name of the machine that is running Watchdog. For example, abc.com.
expectedResponseAfterGet	Watchdog	A string for Watchdog to look for in the server's response to a get. This would be part of the landing page.

Parameter Value	Components	Description
expectedResponseAfterPost	Watchdog	A string for Watchdog to look for in the server's response to a post. This would be the final page or a response to the submission of the landing page.
iAmAliveInterval	Watchdog	Time between <i>I am alive</i> messages.
iAmAliveMailList	Watchdog	A semicolon-separated list of email addresses to send <i>I am Alive</i> messages to. The <i>I am alive</i> message is to track that Watchdog is still running, even if no error reports are being sent.
iAmAliveSubject	Watchdog	The subject line to use for <i>I am Alive</i> messages.
instanceId	Watchdog	Specifies the instance ID of this Watchdog, a numeric value. No default value and does not allow null.
interval	Watchdog	Specifies the number of minutes that Watchdog sleeps between running system check. The default is <i>30 minutes</i> .
logFileMaximumSize	Watchdog	Specifies the maximum size of a log file before rolling over. Values can end in <i>K</i> for kilobytes or <i>M</i> for megabytes.
loops	Watchdog	Specifies the number of times that Watchdog will run loop. A <i>0</i> (zero) means indefinitely. The default is <i>0</i> .
machinesToPing	Watchdog	Specifies a colon (:) delimited list of machines to ping. All required servers (such as database servers, mail servers, and so on) should be included in the list.
mailJobLastModifiedHours	Watchdog	Specifies the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, Minutes and Seconds are added up.
mailJobLastModifiedMinutes	Watchdog	Specifies the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, Minutes and Seconds are added up.
mailJobLastModifiedSeconds	Watchdog	Specifies the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, Minutes and Seconds are added up.
mailMax	Watchdog	Specifies the maximum number of attempts to send a report before giving up. The default is 5.
mailSendOutRate	Watchdog	Specifies the mailcaster send rate in mails per minute. If a mailcaster falls below this threshold, a warning is given.
mailSendOutRateCheckInterval	Watchdog	Specifies the interval in minutes for running the mailSendOutRate. This value must be an even multiple of the interval parameter. For example, if <i>interval=30</i> , then this value must be 30, 60, 90, and so on.
maxMemorySize	Watchdog	Specifies the maximum memory setting for the DES server (that is, the <i>-Mx</i> Java command line argument used). Values can end in <i>G</i> for gigabytes, <i>M</i> for megabytes, <i>K</i> for kilobytes, or nothing, in which case bytes are assumed (for example, 64M).

Parameter Value	Components	Description
maxTargetListDedupTime	Watchdog	Maximum time in minutes for a dedup to run. This value must be an even multiple of the “interval” parameter. For example, if interval=30, then this needs to be 30, 60, 90, and so on.
memoryAlertPercentage	Watchdog	Specifies the percentage of max memory used before sending a warning. For example, if set to “50” and the maxMemorySize were 64M, then memory use over 32 megabytes would register as a failure.
numberOfBackUps	Watchdog	Specifies the number of backup log files.
numberOfObservers	Watchdog	Specifies the number of monitor threads for Watchdog. Always set to 1.
ping	Watchdog	Enables a ping test in Watchdog. The ping validation tells you if a host is alive. Values are <i>YES</i> or <i>NO</i> . The default is <i>YES</i> .
pingCommand	Watchdog	Specifies the ping command for the system. Use the full path for this command and do not assume the use of the “PATH” variable.
pingCommandPostHost	Watchdog	Specifies the ping command for this Watchdog system (default value is empty). You can set Watchdog to test using “/usr/bin/ping machine_name-a” by using the following settings:  pingCommandPreHostto ‘/usr/bin/ping’ and pingCommandPostHost ‘-a’
pingMax	Watchdog	Specifies the number of times that Watchdog will attempt to ping a server before giving up. The default is 20.
pingOkString	Watchdog	Specifies the beginning text of a successful response from the ping command. The default <i>Reply from</i> is used.
pingTimeoutCmdPosition	Watchdog	Specifies the relative position of the ping timeout to the host name. Values are <i>front</i> or <i>rear</i> .  On Win/NT, use <i>front</i> for “ping -w 30 hostname” and on UNIX use <i>rear</i> for “ping hostname 30”.
pingTimeoutCommand	Watchdog	Specifies the argument to pass to ping command to specify a timeout.  On Win/NT, this should be “-w” to make the used ping command “ping -w 30 hostname”.  On UNIX, do not set this value.
pingTimeoutValue	Watchdog	Specifies the number of milliseconds ping will wait for a response (timeout done by ping command). The default is 30 <i>milliseconds</i> .
pingWait	Watchdog	Specifies the number of milliseconds between consecutive ping commands. The default is 15000 <i>milliseconds</i> .

Parameter Value	Components	Description
qkLookPort	Watchdog	Specifies the port number that Watchdog will use for the quick status report. The default is 6700.  To get the report, open a connection from a browser to the URL <code>http://&lt;host&gt;:&lt;qkLookPort&gt;</code> (for example, <code>http://foo.abc.com:6700</code> ). This will return a copy of the last report sent and will also wake the watchdog, if it was sleeping, to run the validation again.
queryToSubmit	Watchdog	Specifies a URL encoded query that watchdog will send to the web server. This would include form fields from the demo dialog's landing page. For example: "First\$Name=foo&Last\$Name=bar&johnDrake=xxx"
queuedEventMinusDays	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
queuedEventMinusHours	Watchdog	Specify the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
queuedEventMinusMinutes	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
queuedMailcasterMinusDays	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added up.
queuedMailcasterMinusHours	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added up.
queuedMailcasterMinusMinutes	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added up.
returnPath	Watchdog	Specifies the return path for the Watchdog reports. This return path should be a valid mailbox, as bounced mails will come to this address.
rmi	Watchdog	Specifies if Watchdog should use RMI to check mailcaster process status.
rmiBasedCheck	Watchdog	Specifies whether to check the Bulk Mailer status using rmi. Values are <i>True</i> or <i>False</i> . Default is <i>False</i> .
rmiPort	Watchdog	Specifies the port to use for RMI connections to the mailcasters. The default is 1099.
runningEventMinusDays	Watchdog	Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
runningEventMinusHours	Watchdog	Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
runningEventMinusMinutes	Watchdog	Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.



Parameter Value	Components	Description
sentOverQueuedRatio	Watchdog	Checks for the number of mails sent compared with the mails queued. This is used like “SentMessages < sentOverQueuedRatio * QueuedMessages”.  Due to bad email addresses, the number of mails sent should always be lower than that queued. However, a very high discrepancy may be a warning of poor data integrity or of failing mail servers.
service	Watchdog	Writes debug information to a log file or the screen. Values are <i>YES</i> to write to a log file, or <i>NO</i> to write to the screen.
showMemoryUsageInErrorMsg	Watchdog	Shows memory use in the Watchdog report. Values are <i>YES</i> or <i>NO</i> . The default is <i>NO</i> . While more informative, this causes the Watchdog reports to be sent out more often, as reports are sent when the report contents change. When showing the actual memory in use, they will most likely change with each run.
socketTimeOut	Watchdog	Specifies the number of seconds before Watchdog stops waiting for a response on a socket. Timeout of 0 will never cause a connection to timeout. The default is 60 seconds.
timeDifference	Watchdog	Specifies in milliseconds the waiting time for Watchdog between the launching of 2 series of tests. The default is 1000 milliseconds.

## Task D-3: Communication Port List for PeopleSoft OLM Components

Many communications exist between the PeopleSoft OLM components. This table provides more detail:

Communication Direction	Port For:	DES Configuration Parameter	Value	Port Default Value
DES to PS Application Server	JOLT	psAppServerURL	//<appserv host>: <jolt port>	none
DES to PIA	PIA HTTP	psPIAServerURL	http:// <CRM PIA web server>:port>	none
DES and PIA to FTP Server	FTP Site	PeopleTools->Administration->URLs ->URL Identifier: RY_ATTACHMENTS	ftp://[user ID:pwd@]<host name>[:port]/[path name]	21
PIA to DES	DES HTTP and HTTPS	URL for IB node PSFT_OLM	http://<des webserver>:port /DCS/DlgBroker	none
End User to DES		defaultURLBase	http://<des webserver>:port /DCS/mcp?p=...	none

<b>Communication Direction</b>	<b>Port For:</b>	<b>DES Configuration Parameter</b>	<b>Value</b>	<b>Port Default Value</b>
DES Clustering	loadbalancer	jmsProviderUrl	t3://<loadbalancer ip : loadbalancer port>	none
		directURLBase	http://<des webserver: not loadbalancer port>	none
DES to Mail Service or Process Scheduler to MCR, WDG and ERP	RMI	rmiPort	[number]	1099
DES to Mail Service or Process Scheduler	RMI	HAS_FIREWALL	true/false	false
		FIREWALL_PORT	[number]	none
DES, MCR, WDG and ERP to Database Server	Database	dbServerURL	MSSQL:jdbc:sqlserver://serverName:port;DatabaseName=instance;sql70=true;charset=Cp1252  ORACLE: jdbc:oracle:thin:@host:port:instanceDB2UDB: jdbc:db2://host:port/instance	MSSQL: 1433
Mail Service to SMTP	SMTP	smtpServerNames	<SMTP hostName>[: portNumber]	25
	POP account			110
WDG	WDG	qkLookPort	http://<wdg_host>[: qkLookPort]	6700

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