
PeopleSoft Enterprise CRM Infosync Server 9 and PeopleSoft Enterprise CRM Infosync Client 9 - Revision 1 - Supplemental Installation

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PeopleSoft Enterprise CRM Infosync Server 9 and PeopleSoft Enterprise CRM Infosync Client 9 - Revision 1 - Supplemental Installation
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CHAPTER 10

Installing PeopleSoft Infosync 9 — Revision 1

This chapter discusses:

- Understanding the PeopleSoft Infosync 9 — Revision 1 Installation
- Prerequisites
- Installing the PeopleSoft Enterprise CRM InfoSync Server and Client 9 – Revision 1
- 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 — Revision 1 Installation

This chapter provides instructions for installing and configuring Oracle's PeopleSoft Enterprise Infosync 9 — Revision 1.

Note. 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.

Note. Check Customer Connection for updates and fixes required at installation before proceeding with your installation.

Prerequisites

PeopleSoft Infosync 9 - Revision 1 supports these application databases:

- PeopleSoft CRM 8.4 SP1
- PeopleSoft CRM 8.8 SP1
- PeopleSoft CRM 8.9 SP1
- PeopleSoft CRM 9.0

Task 10-1: Installing the PeopleSoft Enterprise CRM InfoSync Server and Client 9 – Revision 1

To install the PeopleSoft Infosync Server and PeopleSoft Infosync Client 9 — Revision 1

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 – Revision 1
3. A setup directory will be created containing InfosyncClient and InfosyncServer subdirectories in your install location.

Task 10-2: 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 10-2-1: 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 10-2-2: Reviewing Supported Systems

The following groupware applications are supported and have been tested with the PeopleSoft Infosync Server:

- 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 *EInstall_Domino.doc* and *EInstall_Exchange.doc* install guides for details.

Task 10-3: Preparing the PeopleSoft Infosync Server for Lotus Domino

Review the document *EInstall_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 10-4: Preparing the PeopleSoft Infosync Server for Microsoft Exchange

Review the document *EInstall_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 10-5: 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. We recommend 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>\webserv\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. (i.e. 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>\webserv\peoplesoft` directory. Run the pscipher.bat utility from the command prompt as follows:

```
c:\pt848\webserv\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 10-6: 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 10-7: 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 10-7-1: 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*.

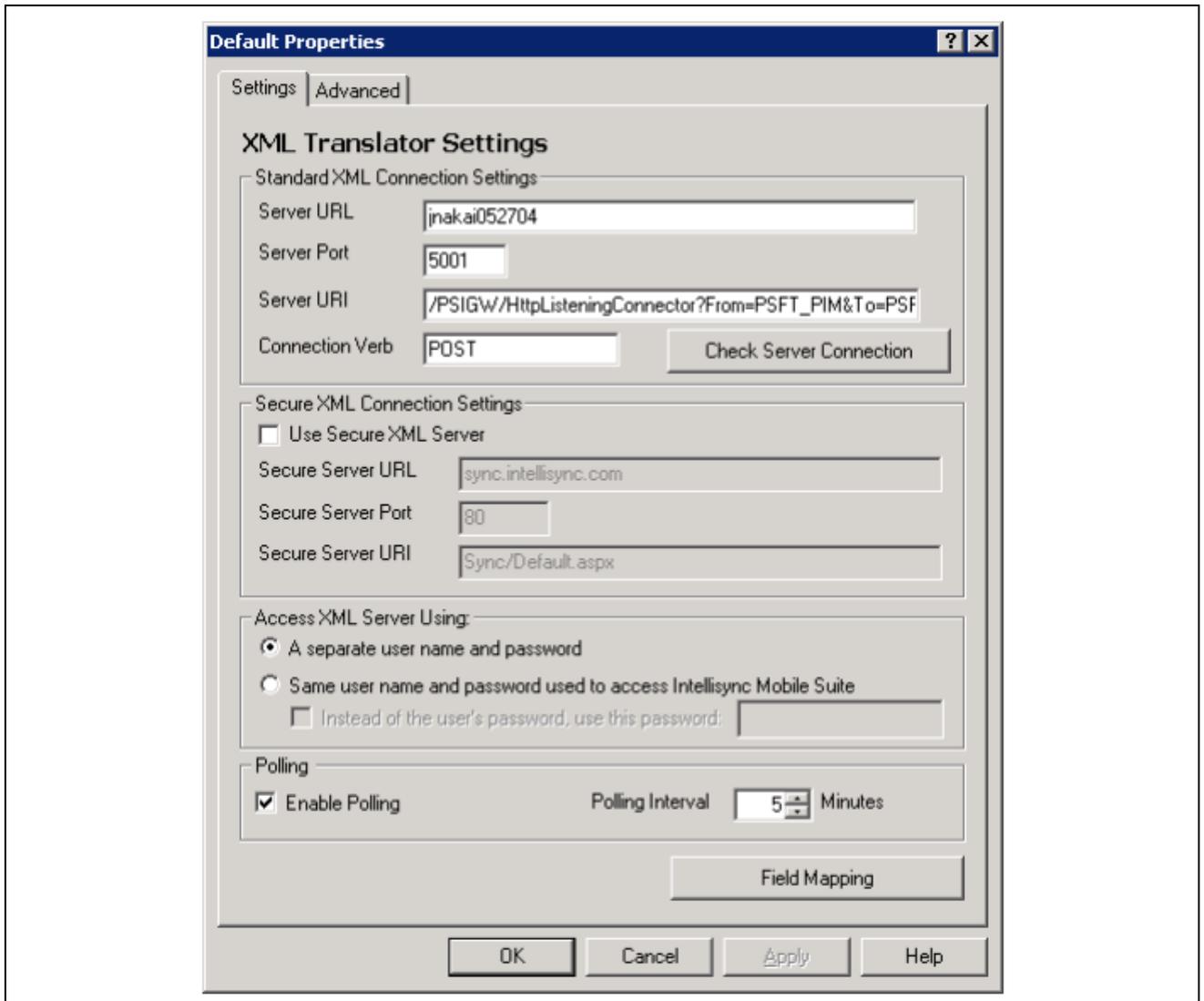
2. When prompted for an XML Connector ID, enter 100. For the Name: PeopleSoft

Task 10-7-2: 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:

- a. In the Server URL field, enter the web server name where your PeopleSoft Integration Broker is running.
- b. In the Server Port field, enter the port number of the web server.
- c. 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
```

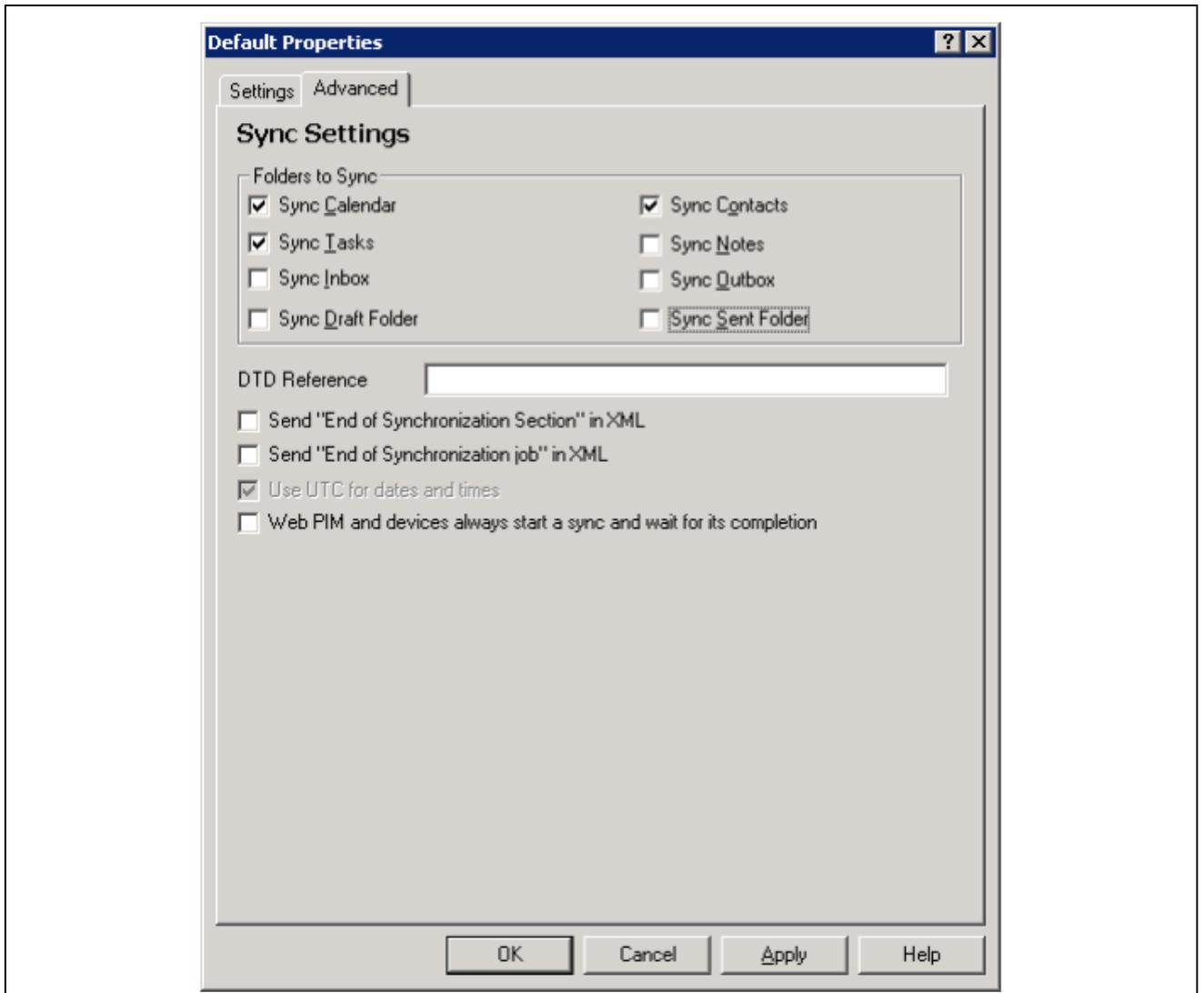
If your integrationGateway.properties file does *not* have a default application server defined, and specifies a NODENAME, enter the following in the Server URI field:

```
/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=  
<defaultLocalNode>&MessageNamePIM_CONTACT_SYNC&MessageType=  
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 10-7-3: 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 10-7-4: 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 10-7-5: 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 10-7-6: 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 10-7-7: Defining PIM Install Options

Defining the PIM Transient User

To define the PIM transient user:

1. 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.

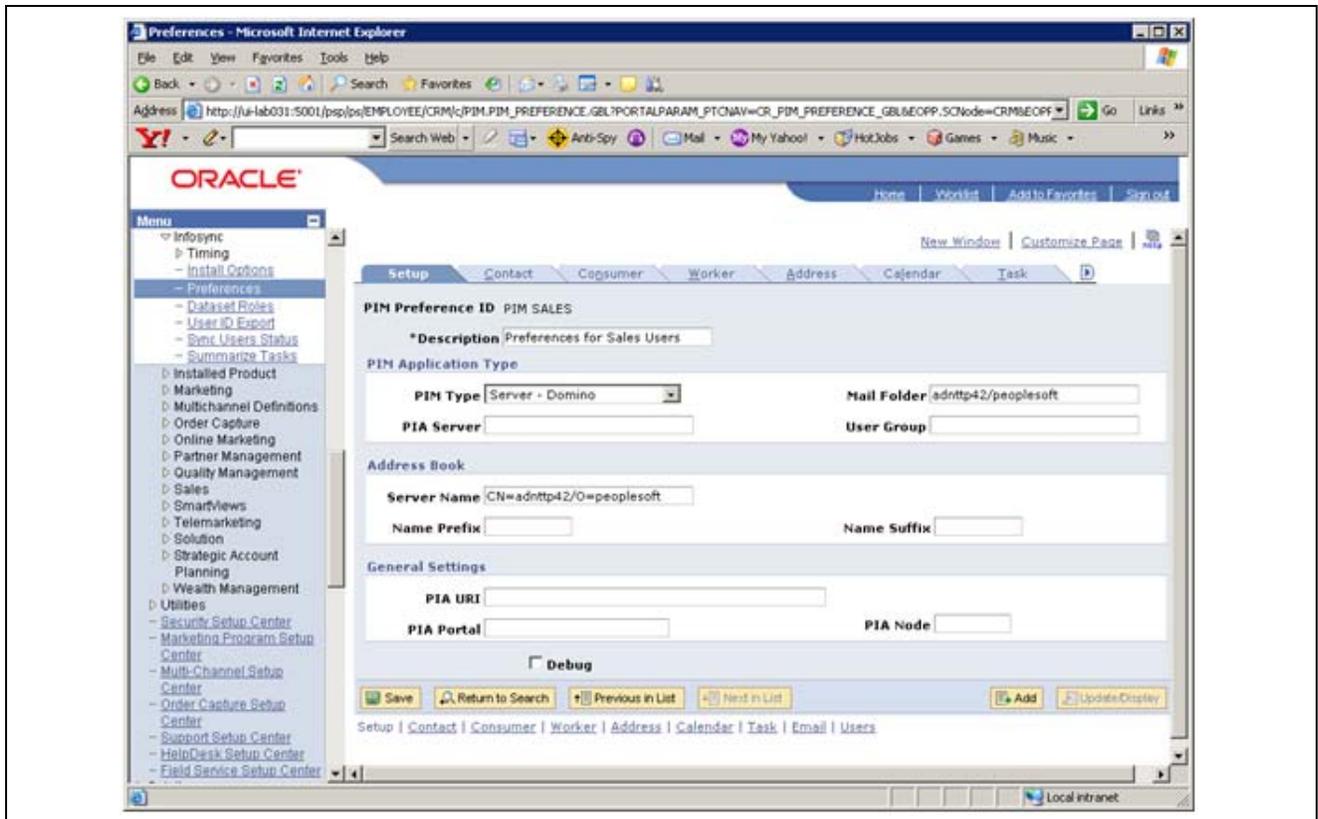
The PIM transient user must be different than the PeopleSoft Integration Broker User ID (specified in User ID Sign On in the PeopleSoft Integration Broker gateway.properties file)

Task 10-7-8: 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).



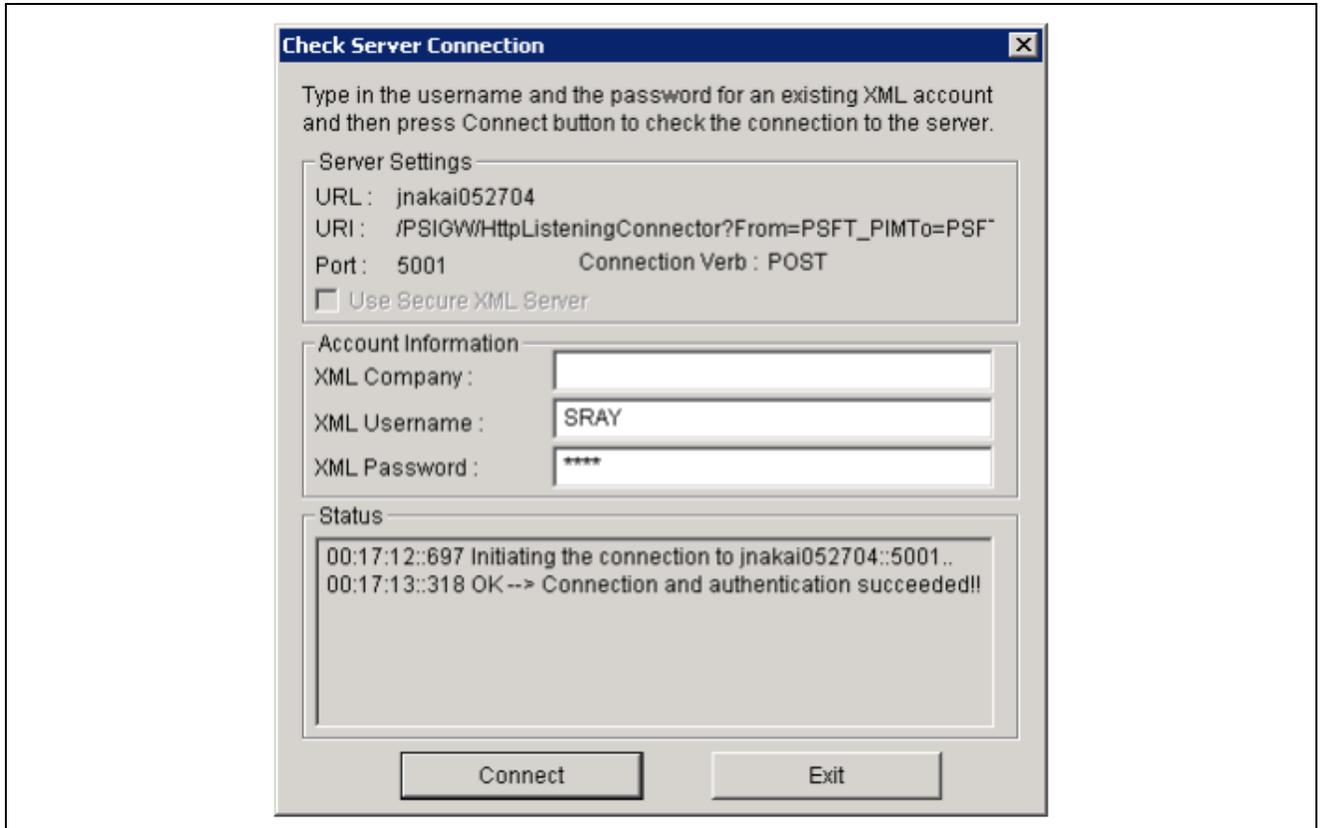
- If *Exchange* is selected, enter the Mail Domain Name
- If *Domino* is selected, enter the Mail Folder and Address Book Server Name.

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 should display a result of OK.



Check Server Connection dialog box

Task 10-8: 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 10-8-1: 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 10-8-2: 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.

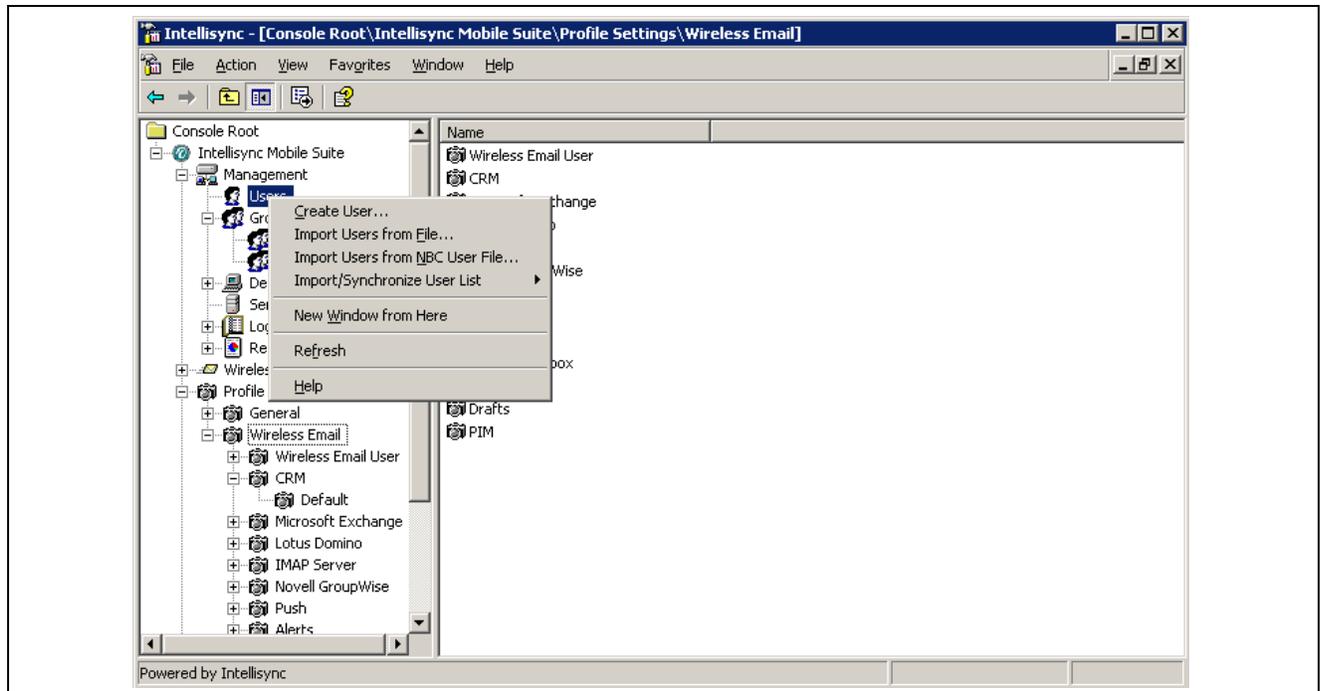
Files are: Infosync_Domino_ID_Import_<date/time>.txt, Infosync_Exchange_ID_Import_<date/time>.txt, and Infosync_Import_Log.txt.

Note. Note that Infosync_Domino_ID_Import_<date/time>.txt file does not appear if no users were associated with PIM preferences for Lotus Domino, and Infosync_Exchange_ID_Import_<date/time>.txt does not appear if no users were associated with PIM preferences for Microsoft Exchange.

Task 10-9: 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 10-10: 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 PeopleSoft Listening Connector (that is, <http://<webserver>/PSIGW/PeopleSoftListeningConnector>).
- Verify that the IntegrationGateway.properties file has been updated.

See “Setting Up the PeopleSoft Integration Broker.”

Task 10-11: Installing the PeopleSoft Infosync Client

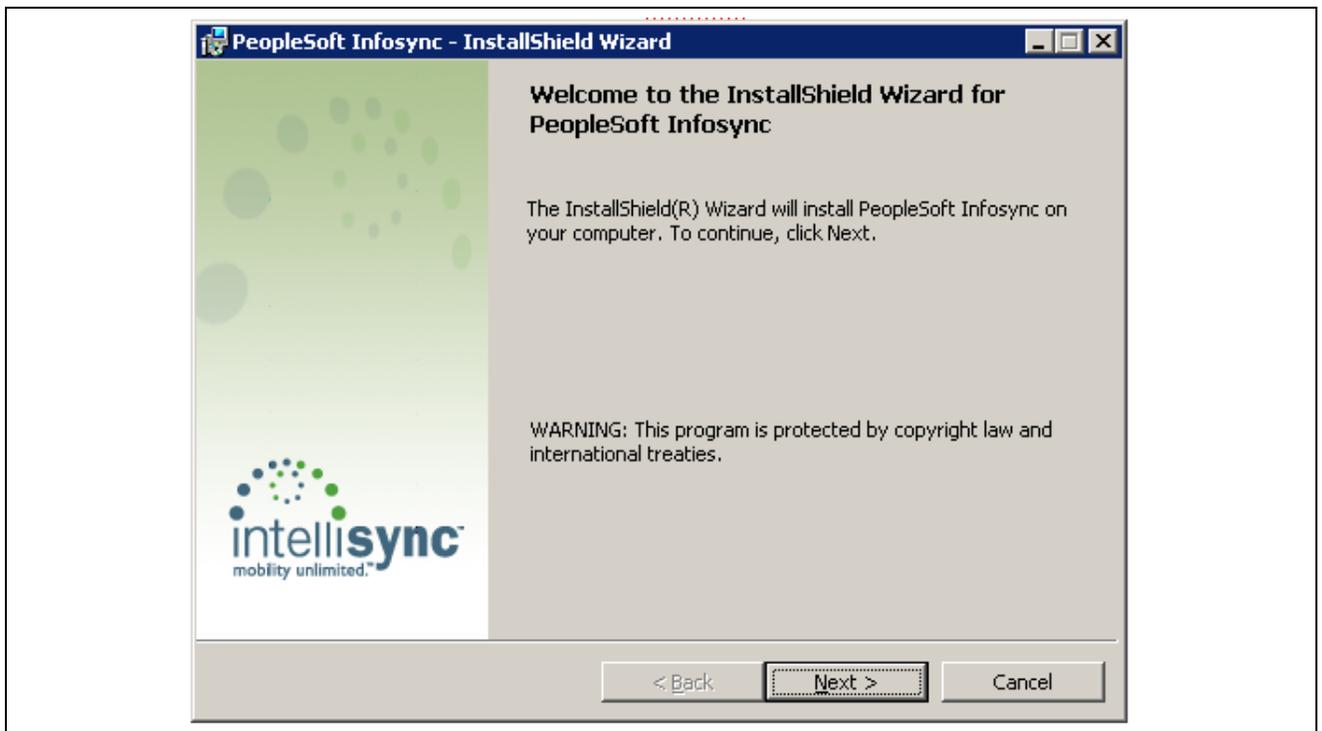
The PeopleSoft Infosync Client does not require installation on a workstation that has PeopleSoft PeopleTools installed; however, doing so causes no harm.

In the task titled “Installing the PeopleSoft Enterprise CRM Infosync Server and Client 9 – Revision 1,” a setup\InfosyncClient directory was installed that contains an IntellisyncForPeopleSoft.exe file. Unzipping this self-extracting file will install a DISK1 directory.

Perform the following PeopleSoft Infosync Client install and configuration steps using the PeopleSoft Infosync InstallShield Wizard to guide end-users 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.

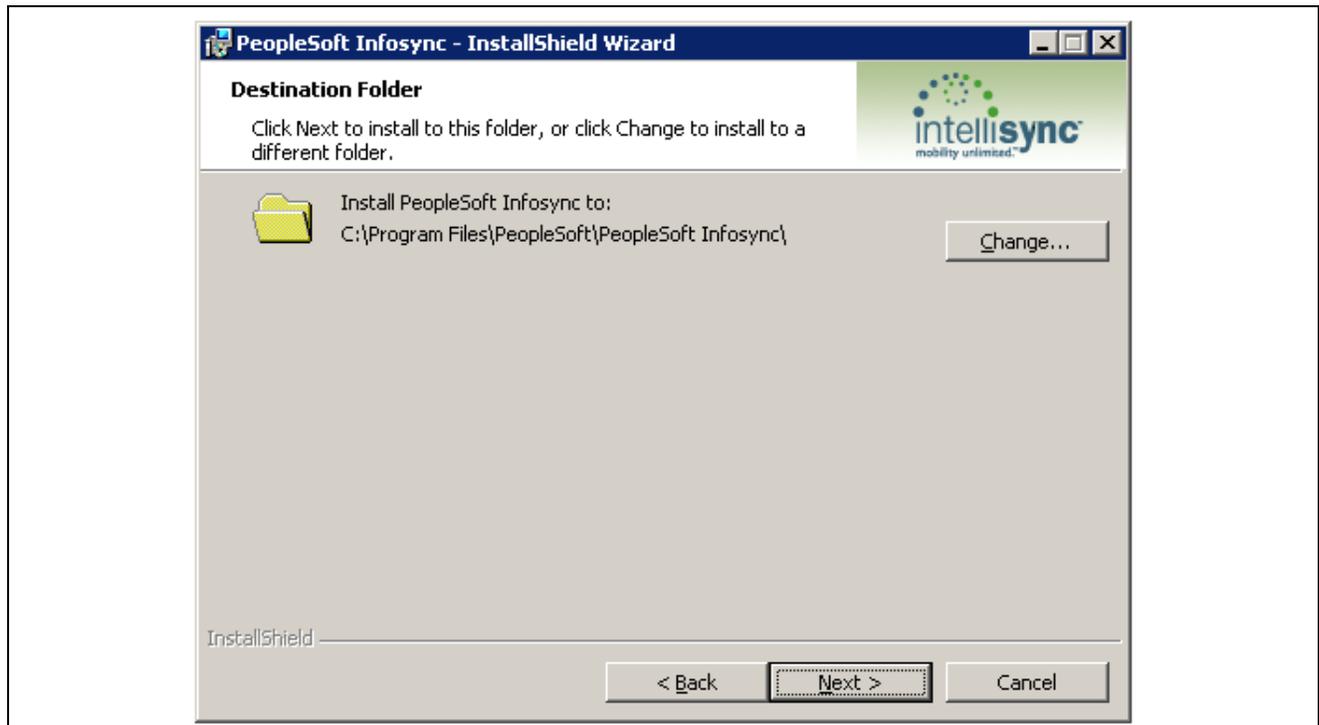


3. Review and accept the license agreement and click Next



Infosync License Agreement

4. Select the destination location and click Next.



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 10-12: Running the PeopleSoft Infosync Client

This section discusses:

- Setting Up the PeopleSoft Infosync Client
- Running the PeopleSoft Infosync Client for Synchronization

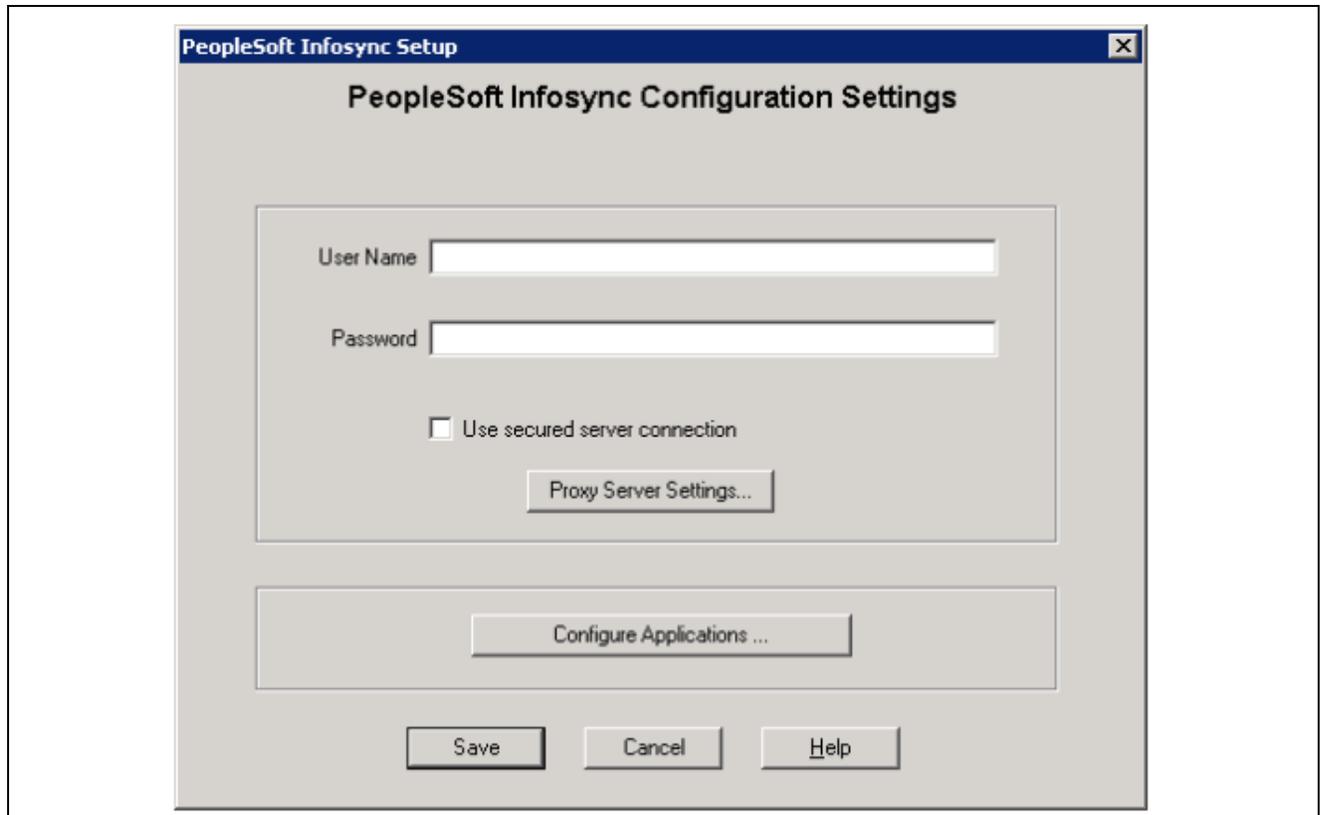
Task 10-12-1: Setting Up the PeopleSoft Infosync Client

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

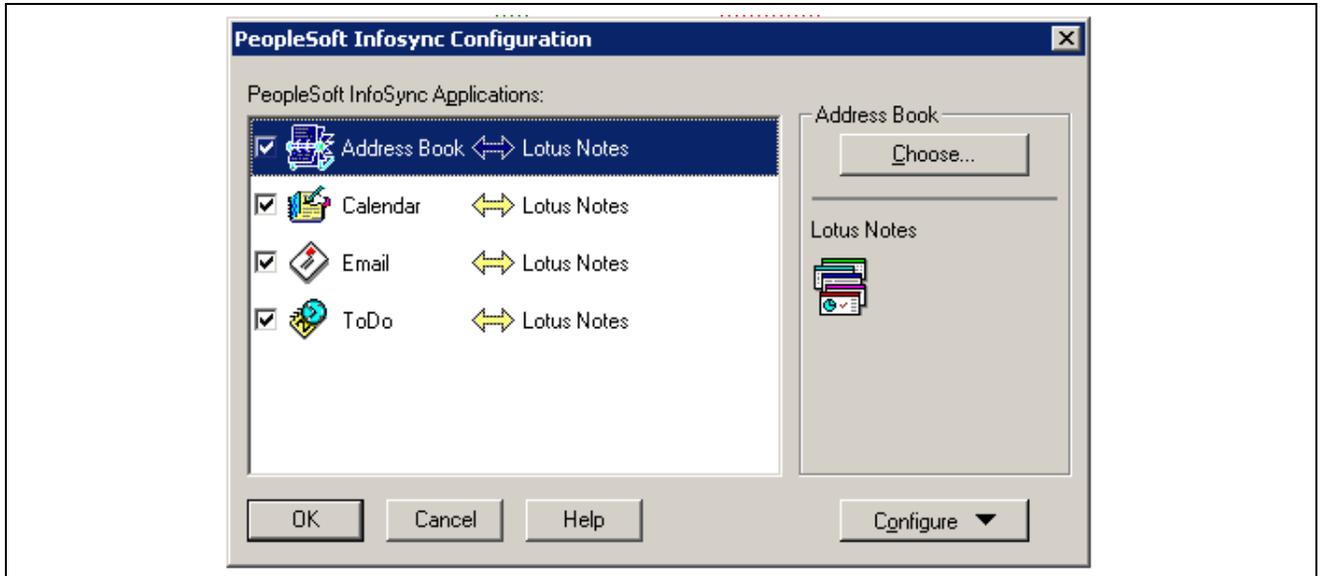
The User must have a PIM preference ID assigned.



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 10-12-2: 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.