

PEOPLESOFT ENTERPRISE CRM 9.0 WORKFORCE COMMUNICATIONS SUPPLEMENTAL INSTALLATION INFORMATION

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Introduction

This installation guide contains instructions for installing Enterprise CRM 9.0 Workforce Communications.

Prerequisites

1. You must have licensed the Workforce Communication Product.
2. The minimum PeopleTools required for a new customer installation is PeopleSoft People Tools release 8.49.11 or higher.
3. Download the Oracle PeopleSoft Customer Relationship Management 9.0 Installation Guide for use during this installation. You can find the installation guide using the following navigation on Oracle.com:

Metalink3, Customer Relationship Management, Documentation, Installation Guides and Notes.
4. Download the Oracle PeopleSoft PeopleTools 8.49 Installation Guide for your database platform. You can find the installation guide using the following navigation on Oracle.com:

Metalink3, Tools and Technology, Documentation, Installation Guides and Notes.
5. Review PeopleTools 8.49 and CRM 9.0 Hardware/Software Requirements.

Installing PeopleTools and Setting Up CRM Database

To install PeopleTools and set up the CRM database:

1. Install PeopleTools for your database platform. Perform the steps in Chapter 1-1: *Installing PeopleSoft PeopleTools and Creating the PeopleSoft CRM Database* of the Customer Relationship Management 9.0 Installation Guide.
2. Set up the CRM 9.0 database. Perform the steps in Chapter 1-2: *Setting Up the PeopleSoft CRM Database*, of the Customer Relationship Management 9.0 Installation Guide.

Installing CRM Online Marketing

Install Customer Relationship Management Online Marketing. Follow the steps in Chapter 3: *Installing PeopleSoft Online Marketing 9* of the Customer Relationship Management 9.0 Installation Guide.

Note. Refer to Appendix D: *Reviewing Tablespaces and Parameters for PeopleSoft CRM OLM* of the Customer Relationship Management 9.0 Installation Guide.

Important! When you are installing CRM Online Marketing, please ensure that you perform the step titled “Verifying the Correct Sun Java JDK Version.” This step is needed prior to activating worker profile, otherwise it will fail due to a date parsing issue with Sun Java JDK 1.5_04.

Applying Maintenance Pack 8

In order to run Workforce Communication, you must apply Maintenance Pack 8 to your installation.

Please download the resolution that matches your current environment.

- For existing CRM 9 customers with Maintenance Pack 7 applied or up-to-date with its application bundles; please download resolution ID 779336. The resolution is for the Delta MP.
- For newly installed CRM 9 customers, and existing customers on support less than MP7, please download resolution ID 779335. The resolution is for the cumulative Maintenance Pack 8.

To download the Maintenance Pack:

1. Go to Oracle.com, Metalink3.
2. Select the Patches and Downloads tab.
3. Select PeopleSoft Products.
4. Enter the resolution ID in the Report ID field.
5. Select the Search (Arrow) button.
6. Select the Report ID that matches your current environment.
7. Apply the Maintenance Pack.

Installing CRM Workforce Communications

To install CRM Workforce Communications:

1. Install the CRM Workforce Communications CD.
2. Follow all prompts on the install screens.

Note. Workforce Communications CD includes only setup and documentation folders.

Applying Bundle 20

Apply Bundle 20 to your CRM Workforce Communications. This bundle is posted as Resolution ID 779190.

To download Bundle 20:

1. Log into Oracle.com, Metalink3.
2. Select the Patches and Downloads tab.
3. Select PeopleSoft Products.
4. Enter 779190 in the Report ID field.
5. Select the Search (Arrow) button.
6. Select the Report ID.
7. Follow all instructions to apply Bundle 20.

Important! You may need to run Sync Gen AE for generating syncids for the following Profile tables:

RA-PROFILE

RA_ATTRIBUTE

RA_ATTR_CHOICES

Refer to the chapter titled “Using Synchronizable Component Interfaces” in the *Enterprise PeopleTools 8.49 PeopleSoft Mobile Agent* Peoplebook, delivered with your release. You can also download the peoplebook on Oracle.com, Oracle Technology Network.

Completing the Installation Table

CRM 9.0 Workforce Communication customers should ensure that the Workforce Setting is enabled on the Installation Table to have access to its specific functionality.

To complete the installation table setting:

1. Log on to the database in PIA
2. Select Set Up CRM.
3. Select Install.
4. Select Installation Options
5. Select the checkbox under *Workforce Connect*.

Note. In all cases where the installation refers to *Company*, *Customer*, and *Contact* roles, replace those with the role of *Worker*. You may not see all values in the drop down list.

Running Application Engine and Audits

To run application engine and audits:

1. Run the Version AE program. To update the version numbers, from the command line prompt, execute the following Application Engine program, replacing the parameters with those applicable to your database:

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

For more information, refer to *Enterprise PeopleTools Application Engine PeopleBook*, delivered with your release. You can also download this documentation from Oracle Technology Network on Oracle.com.

2. Run DDDAUDIT and SYSAUDIT. For more information, refer to *Enterprise PeopleTools Data Management PeopleBook*, delivered with your release. You can also download this documentation from Oracle Technology Network on Oracle.com.