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# PeopleSoft Enterprise Customer Relationship Management 9.1 Installation Guide

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**OCTOBER 2010**

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# Contents

## Preface

- About This Documentation.....xv**
- Understanding This Documentation.....xv
- Audience.....xv
- Typographical Conventions.....xvi
- Products.....xvii
- Related Information.....xviii
- Comments and Suggestions.....xviii

## Chapter 1

- Installing PeopleSoft CRM 9.1 Applications.....1**
- Understanding the PeopleSoft CRM Installation.....1
- Using Oracle E-Delivery to Obtain Installation Files.....2
- Installing PeopleSoft PeopleTools and Databases.....2
  - Installing PeopleSoft PeopleTools.....2
  - Reviewing the Demo Database Sizing.....3
  - Creating and Configuring a Search Collection on UNIX.....3
- Setting Up the PeopleSoft CRM Database.....4
  - Loading Active Analytics Framework Data.....4
- Configuring an FTP Server for Storing Attachments.....4
- Setting Start Values for Auto-Numbered Fields.....6
- Configuring Computer Telephony Integration.....7
- Activating Basic Data Summary and Messaging.....8
- Setting Up the PeopleSoft Integration Broker.....8
  - Configuring the Gateway URL.....8
  - Setting Up the Service Configuration for Web Services.....10
  - Activating the PeopleSoft Integration Broker Domain.....11
  - Setting Default User IDs on Internal PeopleSoft Integration Broker Nodes.....12
- Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture.....12
  - Setting Up and Configuring the Webserver.....12
  - Modifying the Proxy Server Setting in the setEnv File.....14
  - Updating Gateway Properties.....15
  - Defining Installation Options.....17
  - Setting Up the Cybersource PSFT\_CYB Node.....17

Testing Connectivity.....20

**Chapter 2**

**Installing PeopleSoft Correspondence Management.....23**  
 Understanding PeopleSoft Correspondence Management.....23  
 Identifying and Configuring FTP Servers.....24  
 Copying RTF and Text Template to the FTP Server.....25  
 Registering the FTP Servers.....26  
 Installing Additional Component Software — Xpdf.....27  
 Configuring User Selected Font for XMLP.....28  
 Reviewing PeopleSoft Correspondence Management.....28  
 Registering Microsoft Window Printers (Optional).....29  
 Defining the CLASSPATH for Sun Java Mail Files.....30

**Chapter 3**

**Installing PeopleSoft Online Marketing 9.1.....33**  
 Understanding PeopleSoft Online Marketing Setup.....33  
 Prerequisites.....35  
 Configuring PeopleSoft OLM System Parameters.....35  
 Setting Up the FTP Server URL for File Upload.....37  
 Setting the PS\_FILEDIR Environment Variable.....39  
 Setting Up Web Profile to Bypass the Sign-In Page.....39  
 Assigning PeopleSoft OLM Self-Service Permissions.....41  
     Understanding PeopleSoft Self-Service Permissions.....41  
     Registering a PeopleSoft OLM User in Self-Service.....41  
     Assigning Self-Service Roles to PeopleSoft OLM Users.....43  
 Setting Up PeopleSoft OLM Integration Points.....44  
     Understanding PeopleSoft OLM Messages.....44  
     Loading Gateway Connectors.....44  
     Setting PeopleSoft Integration Security Properties.....45  
     Setting Up the URL for the PSFT\_OLM Node.....46  
 Installing the DES on the Oracle WebLogic Server.....47  
     Understanding DES Installation on Oracle WebLogic.....47  
     Installing DES on Oracle WebLogic for MS Windows.....47  
     Installing the DES on Oracle WebLogic on UNIX.....53  
     Modifying the setEnv.sh.....55  
     Starting the DES on an Oracle WebLogic Server.....55  
 Installing the DES on an IBM WebSphere Server.....56

Understanding DES Installation on IBM WebSphere.....	56
Creating a New IBM WebSphere Server.....	56
Creating and Removing Services for MS Windows.....	59
Installing the DES on IBM WebSphere on MS Windows.....	59
Installing the DES on an IBM WebSphere for UNIX.....	62
Starting the DES on an IBM WebSphere Server.....	64
Retrieving and Installing JDBC Drivers.....	65
Downloading JDBC Drivers.....	65
Installing JDBC Driver on the PeopleSoft Server.....	66
Installing the JDBC Driver on the DES.....	66
Cybersource Credit Card Integration Configuration.....	66
Testing the DES Installation.....	69
Testing the Email Server.....	70
Adding Standalone Dialog Servers (Optional).....	70
Understanding Adding Standalone Dialog Servers.....	70
Adding Standalone Dialog Servers.....	71
Adding E-Mail Response Processor.....	72
Adding Mail Service.....	73
Adding Watch Dog.....	74
Starting, Stopping, and Deleting Services.....	74
Installing Adobe Graphic Dialog Flow Designer.....	74
Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic.....	75
Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere.....	77
Installing Adobe Graphic Dialog Flow Designer on Microsoft Windows.....	80
Setting Up Profiles.....	80
Setting Up Automatic Numbering for Profiles.....	80
Setting Non English Based Reserved Word.....	81
Tuning the System (Optional).....	81
Improving PeopleSoft OLM Transaction Performance.....	82
Starting the Daily Survey Report Data Purge.....	82
Checking Heap Size for Java Virtual Machine on DES.....	83

## Chapter 4

<b>Installing PeopleSoft Order Capture Self-Service.....</b>	<b>85</b>
Understanding PeopleSoft Order Capture SelfService.....	85
Understanding the Guest User Role.....	86
Understanding the Homepage URL.....	88
Defining the Guest User.....	88
Disabling the New Window URL.....	89

**Chapter 5**

**Integrating PeopleSoft Order Capture Self-Service.....91**

Understanding Additional Component Integration.....91

Integrating the PeopleSoft Freight Calculation.....91

    Understanding PeopleSoft Freight Calculation.....91

    Setting Up PeopleSoft Freight Calculation.....92

    Testing the PeopleSoft Freight Calculation.....95

Setting Up Business Interlink Architecture for Tax.....96

    Understanding the Business Interlink Setup.....97

    Selecting Vendor Plug-in Locations.....98

    Editing the Application Server Configuration File.....98

    Selecting Vendor DLLs and Shared Library Locations.....98

Installing ADP Taxware and Vertex Databases.....99

    Understanding the ADP Taxware and Vertex Install.....99

    Installing ADP Taxware.....99

    Installing Vertex.....100

Setting Up PeopleSoft OC with ADP Taxware WorldTax.....100

    Understanding ADP Taxware WorldTax Integration.....100

    Integrating PeopleSoft OC with ADP Taxware.....101

    Testing the Integration.....102

**Chapter 6**

**Integrating PeopleSoft Customer Relationship Management 9.1 with Oracle E-Business Suite.....103**

Understanding PeopleSoft CRM and Oracle EBS Integration.....103

Prerequisites.....104

Integrating PeopleSoft CRM for Oracle EBS using Fullsync.....104

    Setting Up Service Operations for Fullsync.....104

    Verifying Schemas for all Messages for Fullsync.....105

    Configuring the Process Scheduler for Fullsync.....106

    Locating the Fullsync Data File Folders.....106

    Retrieving and Copying Fullsync Oracle EBS Data Files to the Process Scheduler.....106

Integrating PeopleSoft CRM for Oracle EBS using Incremental Sync.....108

    Setting Up the Local Gateway for Incremental Sync.....108

    Verifying Schemas for all Messages for Incremental Sync.....109

    Verifying Service Operations for Incremental Sync.....109

    Verifying Handlers for Incremental Sync.....110

    Verifying Routings for Incremental Sync.....110

    Verifying Nodes for Incremental Sync.....111

Publishing WSDLs for Service Operations for Incremental Sync.....	111
Integrating PeopleSoft CRM for Oracle EBS using PeopleSoft 360-Degree.....	112
Setting Up Messages for PeopleSoft 360-Degree.....	113
Setting Up Nodes for PeopleSoft 360-Degree.....	113
Verifying Service Operations for PeopleSoft 360-Degree.....	117
Verifying Service Operation Handlers for PeopleSoft 360-Degree.....	119
Verifying Service Operation Routings for PeopleSoft 360-Degree.....	120
Setting Up Action Links.....	121
Setting Up Basic Business Events Subscriptions.....	122
Creating New Business Events to Indicate Target URLs.....	126
Setting the Encryption Key.....	127
Applying Patches for Incremental Sync.....	127
Publishing the PeopleSoft 360-Degree WSDLs.....	128
Verifying Set Up Between PeopleSoft CRM and Oracle EBS.....	129

## Chapter 7

<b>Integrating PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 with HRHD.....</b>	<b>135</b>
Understanding PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 Integration.....	135
Prerequisites.....	135
Setting up the PeopleSoft HCM 9/9.1 Database.....	135
Setting Up the Gateway for PeopleSoft CRM and PeopleSoft HCM.....	136
Accessing the PeopleSoft CRM Local Node Definition.....	137
Accessing the PeopleSoft HCM Local Node Definition.....	140
Adding PeopleSoft CRM Trusted Node for Single Signon.....	143
Accessing HD_360_REQUEST_SYNC Service Operation.....	144
Adding a PeopleSoft CRM Active Routing for Version 2.....	145
Running Row Level Security in PeopleSoft HCM.....	147
Setting Up the PeopleSoft CRM 9.1 Database.....	148
Accessing the PeopleSoft CRM Local Node Definition.....	148
Accessing the PeopleSoft HCM Local Node Definition.....	149
Adding PeopleSoft HCM Trusted Node for PeopleSoft Single Signon.....	151
Activating Service Operations.....	151
Adding a PeopleSoft HCM Active Routing for Version 2.....	152

## Chapter 8

<b>Integrating PeopleSoft HRMS 8.9 with HRHD.....</b>	<b>155</b>
Understanding Integrating PeopleSoft HRMS and HRHD.....	155
Prerequisites.....	156

Setting Up the URL Gateway for PeopleSoft CRM and HRMS.....	156
Understanding the URL Gateway Setup for PeopleSoft CRM and HRMS.....	156
Setting Up the PeopleSoft CRM Gateway.....	156
Setting up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools Prior to 8.48.....	158
Setting Up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools 8.48 and Above.....	160
Setting Up PeopleSoft CRM and HRMS Connector IDs.....	161
Defining Connector ID for Nodes in the PeopleSoft CRM System.....	161
Defining Connector ID for Nodes in the PeopleSoft HRMS System.....	162
Setting Up PeopleSoft Single Signon.....	164
Pinging the PeopleSoft CRM and HRMS Nodes.....	167
Activating the Message Channel or Queue.....	168
Confirming that Channel HD_360_SETUP is Running.....	168
Confirming that Queue HD_360_SETUP is Running.....	168
Activating the HR_HELPDESK_360 EIP Messages.....	169
Understanding Message Activation for HR_HELPDESK.....	169
Activating 360-Degree Messages in PeopleSoft HRMS.....	169
Activating PeopleSoft HRMS 89 PSFT_CR Transactions.....	170
Activating PeopleSoft CRM 91 and HRMS 89 Service Operations for PeopleSoft PeopleTools 8.48 and Above.....	173
Setting Up Portal Content Links.....	176
Activating Link Category for PeopleSoft HRMS 8.9.....	178

## Chapter 9

### **Integrating PeopleSoft CRM and PeopleSoft CS for Higher Education 360-Degree View.....**

<b>View.....</b>	<b>183</b>
Prerequisites.....	183
Setting Up the Gateway for PeopleSoft CRM and PeopleSoft CS.....	183
Setting Up PeopleSoft Single Signon.....	185
Setting Up the PeopleSoft CRM and PeopleSoft CS Nodes.....	186
Setting Up the Authentication Option for the PSFT_CR Node (Optional).....	186
Defining a PSFTTARGET Connector ID for Nodes in PeopleSoft CRM and PeopleSoft CS.....	187
Pinging the PeopleSoft CRM and PeopleSoft CS Nodes to Verify Configuration.....	188
Activating the PeopleSoft Higher Education 360 Service Operation and Routing.....	189
Configuring PeopleSoft CS to Define Integration Data.....	191
Setting Up Portal Content Links for Action Links.....	192

**Chapter 10**

<b>Deploying and Configuring the PeopleSoft Connector and the Oracle Enterprise Manager Console.....</b>	<b>195</b>
Prerequisites.....	195
Copying the JAR File.....	196
Deploying and Registering the PeopleSoft Connector.....	196
Troubleshooting the PeopleSoft Connector Registration.....	198
Configuring the PeopleSoft Connector.....	199

**Chapter 11**

<b>Installing the PeopleSoft CRM 9.1 Portal Pack.....</b>	<b>203</b>
Understanding PeopleSoft Portal Pack Installation.....	203
Granting PeopleSoft Portal Pack Personalization.....	203
Updating the Homepage Personalization Permissions.....	204
Adding the Portal User Role to the User IDs.....	204
Accessing PeopleSoft CRM Through the Enterprise Portal.....	204

**Chapter 12**

<b>Installing the PeopleSoft Advanced Configurator 9.1.....</b>	<b>205</b>
Understanding the PeopleSoft Advanced Configurator 9.1.....	205
Reviewing the Installation Requirements.....	206
Prerequisites.....	206
Reviewing the PeopleSoft Advanced Configurator Installation Process.....	206
Understanding PeopleSoft Visual Modeler and the PeopleSoft Advanced Configurator Server.....	207
Installing the Oracle WebLogic Application Server on Microsoft Windows.....	207
Installing the Oracle WebLogic Server.....	208
Running the Oracle WebLogic Server as a Service.....	208
Changing the Oracle WebLogic Server System Password.....	208
Uninstalling the Oracle WebLogic Server.....	209
Installing the PeopleSoft Advanced Configurator Server on Microsoft Windows.....	209
Installing the PeopleSoft Advanced Configurator Server.....	209
Changing the Oracle WebLogic Server System Password.....	215
Uninstalling the PeopleSoft Configuration Server.....	216
Starting and Configuring the PeopleSoft Advanced Configurator Server on Microsoft Windows.....	216
Understanding How to Start the PeopleSoft Advanced Configurator Server on Microsoft Windows.....	217
Starting the PeopleSoft Advanced Configurator from a Microsoft Command Window.....	217
Installing the PeopleSoft Advanced Configurator as a Microsoft Window Service.....	217
Starting the PeopleSoft Advanced Configurator as a Microsoft Window Service.....	218

Resetting the Port.....	218
Setting the XML Encoding Option (Optional).....	218
Installing the PeopleSoft Advanced Configurator on Sun Solaris.....	219
Understanding the PeopleSoft Advanced Configurator Installation.....	219
Setting Up the Database.....	219
Installing the Oracle WebLogic Application Server on Sun Solaris .....	220
Installing the Oracle WebLogic Application Server 10.3.1.....	220
Uninstalling the Oracle WebLogic Server.....	221
Installing the PeopleSoft Advanced Configurator Server on Sun Solaris .....	221
Understanding the PeopleSoft Configurator Server Installation on Sun Solaris.....	221
Installing the PeopleSoft Configurator Server on Sun Solaris.....	222
Changing the Oracle WebLogic Server System Password.....	229
Uninstalling the PeopleSoft Advanced Configurator Server.....	229
Starting and Configuring the PeopleSoft Advanced Configurator Server on Sun Solaris.....	229
Understanding the PeopleSoft Advanced Configurator Server Initiation on Sun Solaris.....	230
Starting PeopleSoft Advanced Configurator Server from the Command Line.....	230
Stopping the PeopleSoft Advanced Configurator Server from the Command Line.....	231
Automatically Starting the PeopleSoft Advanced Configurator Server.....	231
Resetting the Port.....	231
Setting the XML Encoding Option (Optional).....	232
Installing the PeopleSoft Visual Modeler.....	233
Understanding the PeopleSoft Visual Modeler.....	233
Installing the PeopleSoft Visual Modeler on Microsoft Windows.....	233
Uninstalling the PeopleSoft Visual Modeler.....	237
Installing for Integration with PeopleSoft Order Capture.....	237
Understanding PeopleSoft Advanced Configurator and PeopleSoft Order Capture Integration.....	238
Reviewing the Recommended Architecture.....	238
Installing the PeopleSoft Advanced Configurator for Integration with PeopleSoft Order Capture.....	240
Setting Up a Proxy to the PeopleSoft Configuration Server for Integration.....	241
Installing Multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows (Optional). ....	242
Using Multiple Oracle WebLogic Server Installations.....	243
Using a Single Oracle WebLogic Server Installation.....	243

**Chapter 13**

<b>Installing the Oracle WebLogic Controller.....</b>	<b>245</b>
Understanding the Oracle WebLogic Controller.....	245
Prerequisites.....	246
Installing the Oracle WebLogic Controller on UNIX.....	246

Installing the PeopleSoft Advanced Configurator.....	246
Exporting the Configuration and Running the AE Program.....	246
Installing the PeopleSoft Visual Modeler 9.1.....	247
Updating JNDIDBName.properties.....	247
Compiling the ProductCatalogueRepository Model and Exporting the XML File.....	249
Using Web Based Compilation.....	250
Creating the Oracle WebLogic Controller Domain on UNIX.....	251
Creating the WebApplications Folder Under the Controller Domain.....	253
Modifying the Webservices Properties File (webservices.properties).....	254
Modifying the Application Properties File (application.properties).....	255
Deploying the Oracle WebLogic Controller Application.....	256
Installing the Oracle WebLogic Controller on Microsoft Windows.....	258
Installing the PeopleSoft Advanced Configurator.....	258
Exporting the Configuration and Running the AE Program.....	259
Installing the PeopleSoft Visual Modeler 9.1.....	259
Updating JNDIDBName.properties.....	259
Compiling the ProductCatalogueRepository Model.....	261
Using Web Based Compilation for the Model.....	262
Creating the Oracle WebLogic Controller Domain on Microsoft Windows.....	263
Creating the WebApplications Folder Under the Controller Domain.....	270
Modifying the Webservices Properties File (webservices.properties).....	271
Modifying the Application Properties File (application.properties).....	271
Deploying the Oracle WebLogic Controller Application.....	272
Configuring and Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture.....	274
Configuring the Configurator Connection on PeopleSoft Pure Internet Architecture.....	275
Activating Web Services Required for the Controller.....	275
Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture.....	277

**Chapter 14**

<b>Integrating PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9.0.....</b>	<b>279</b>
Understanding PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9.....	279
Prerequisites.....	279
Setting Up PeopleSoft SA Database for PeopleSoft OLM Integration.....	280
Setting Up and Testing the EIP Configuration.....	280
Defining Full Data Publish Rules.....	282
Setting Service Operations Security.....	286
Granting Security for Application Engine Processes and New Pages.....	287
Using the ADCRMPST Job Definition.....	287

Using the SAD_CRM_SYN2 Process Definition.....	288
Setting Up PeopleSoft OLM for PeopleSoft SA Integration.....	288
Prerequisites.....	288
Setting Up and Testing the EIP Configuration.....	289
Setting Up the Web Template URL in the PeopleSoft CRM Database.....	293
Assigning Valid Mailbox Email Addresses.....	293
Defining SETID for Inbound EIP Data.....	294
Setting Up the FTP Server for the PeopleSoft SA Database.....	295
Populating Profile Attribute Choices from PeopleSoft SA to PeopleSoft CRM.....	296
Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database.....	296
Populating Student Data from PeopleSoft SA to PeopleSoft CRM.....	297
Deploy CS_ Dialogs to Start Dialog Execution.....	298
Running the TS189 Processes to Post Data (Optional).....	298
Posting Dialog Questions from PeopleSoft CRM to PeopleSoft SA in the PeopleSoft CRM Database (Optional).....	299

## Chapter 15

<b>Installing BPEL and Deploying BPEL Processes.....</b>	<b>301</b>
Understanding PeopleSoft BPEL Integration.....	301
Installing the Oracle BPEL Process Manager.....	302
Selecting and Installing the Software.....	302
Applying Patches.....	303
Configuring the Oracle BPEL Process Manager.....	303
Understanding the Oracle BPEL Configuration.....	303
Adjusting the JTA Transaction Timeout.....	304
Tuning the Sun Java Virtual Machine and Setting Proxy Values.....	304
Timeout Setting Adjustments.....	307
Changing ORABPEL Schema for PeopleSoft Worklist.....	307
Verifying Required Message Container Definitions.....	307
Restarting the Instance.....	312
Recording Access Information.....	312
Creating and Configuring a BPEL Domain.....	312
Understanding BPEL Domain Configuration.....	313
Creating a New BPEL Domain.....	313
Setting the Domain auditLevel.....	313
Configuring PeopleSoft for BPEL Integration.....	314
Understanding PeopleSoft BPEL Configuration.....	315
Configuring a Special PeopleSoft Environment.....	315
Configuring the PeopleSoft Integration Broker Gateway.....	315

Confirming PeopleSoft Integration Broker Access.....	316
Configuring Enterprise Service Settings.....	316
Configuring the BPEL Node.....	317
Updating the BPEL Process End Points.....	318
Configuring the PeopleSoft Worklist Web Service.....	318
Activating Web Services.....	323
Configuring the PeopleSoft BPEL End User Monitor.....	326
Restarting PeopleSoft Enterprise Environment.....	328
Verifying PeopleSoft Integration Broker Access.....	328
Deploying PeopleSoft CRM BPEL Processes.....	328
Understanding PeopleSoft CRM BPEL Deployment.....	328
Copying BPEL Process Files.....	329
Configuring BPEL Process Files for Deployment.....	330
Deploying All BPEL Processes.....	331

**Chapter 16**

<b>Installing PeopleSoft Unified Agent Desktop.....</b>	<b>333</b>
Understanding PeopleSoft Unified Agent Desktop.....	333
Prerequisites.....	334
Configuring the Oracle Proxy-Enabled Server.....	334
Validating PeopleSoft MultiChannel Framework REN.....	334
Configuring a User as a PeopleSoft UAD Voice Agent.....	335
Configuring a User as a PeopleSoft UAD MCF Agent.....	337
Configuring Agent Presence Codes.....	338
Overriding Presence Text of System-Defined Entries (Optional).....	339
Configuring Action Buttons for PeopleSoft UAD.....	339
Defining Task Category Codes.....	340
Configuring Status Codes.....	341
Enabling PeopleSoft UAD Pagelet for the Home Page (Optional).....	343
Enabling PeopleSoft CRM UAD.....	343
Updating Branding.....	343
Editing the PeopleSoft MultiChannel Toolbar.....	344
Editing the PeopleSoft PeopleTools 8.50 Default Template.....	345
Editing the PeopleSoft PeopleTools 8.50 Frames Template.....	346
Editing the Hover Navigation iFrame Template.....	347

**Appendix A**

<b>Reviewing PeopleSoft Tablespaces and Parameters.....</b>	<b>349</b>
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Understanding PeopleSoft OLM Tablespaces.....	349
Resizing within PeopleSoft Customer Data Model.....	350
Changing Parameter Values.....	351
Reviewing Parameter Descriptions.....	352
Reviewing the PeopleSoft OLM Component Port List.....	365

<b>Appendix B</b>	
<b>Getting Started with CRM for Higher Education.....</b>	<b>367</b>

<b>Index .....</b>	<b>369</b>
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# About This Documentation

This preface discusses:

- Understanding This Documentation
- Audience
- Typographical Conventions
- Products
- Related Information
- Comments and Suggestions

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## Understanding This Documentation

This documentation is designed to direct you through a basic PeopleSoft installation. It is not a substitute for the database administration documentation provided by your relational database management system (RDBMS) vendor, the network administration documentation provided by your network vendor, or the installation and configuration documentation for additional software components that are used with PeopleSoft products.

Required updates to this installation documentation are provided in the form of “Required for Install” incidents, which are available on My Oracle Support.

Instructions for installing Oracle’s PeopleSoft Enterprise PeopleTools are provided in PeopleSoft PeopleTools installation guides. Application-specific installation instructions are provided in a separate document for the PeopleSoft application. For instance, if you are installing Oracle’s PeopleSoft Enterprise Customer Relationship Management (CRM), you need both the PeopleSoft PeopleTools installation guide and the additional instructions provided for installing PeopleSoft CRM.

To find the installation documentation for PeopleSoft PeopleTools or for your PeopleSoft application, go to My Oracle Support.

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**Note.** Before proceeding with your installation, check My Oracle Support to ensure that you have the latest version of this installation guide for the correct release of the PeopleSoft product that you are installing.

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## Audience

This documentation is written for the individuals responsible for installing and administering the PeopleSoft environment. This documentation assumes that you have a basic understanding of the PeopleSoft system. One of the most important components in the installation and maintenance of your PeopleSoft system is your on-site expertise.

You should be familiar with your operating environment and RDBMS and have the necessary skills to support that environment. You should also have a working knowledge of:

- SQL and SQL command syntax.
- PeopleSoft system navigation.

- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

Oracle recommends that you complete training, particularly the PeopleSoft Server Administration and Installation course, before performing an installation.

See My Oracle Support

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## Typographical Conventions

To help you locate and understand information easily, the following conventions are used in this documentation:

Convention	Description
<b>Monospace</b>	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
<i>Italics</i>	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example:  Enter the letter <i>O</i> .
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with <i>See</i> refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation.  Cross-references under the heading <i>See Also</i> refer you to additional documentation that has more information regarding the subject.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
<b>Note.</b> Note text.	Text that begins with <i>Note.</i> indicates information that you should pay particular attention to as you work with your PeopleSoft system.

Convention	Description
<b>Important!</b> Important note text.	A note that begins with <i>Important!</i> is crucial and includes information about what you need to do for the system to function properly.
<b>Warning!</b> Warning text.	A note that begins with <i>Warning!</i> contains critical configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

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## Products

This documentation may refer to these products and product families:

- Oracle® BPEL Process Manager
- Oracle® Enterprise Manager
- Oracle® Tuxedo
- Oracle® WebLogic Server
- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Change Impact Analyzer
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Enterprise Customer Relationship Management
- Oracle's PeopleSoft Enterprise Financial Management
- Oracle's PeopleSoft Enterprise Human Resources Management Systems
- Oracle's PeopleSoft Enterprise Learning Management
- Oracle's PeopleSoft Enterprise Pay/Bill Management
- Oracle's PeopleSoft Enterprise PeopleTools
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Enterprise Portal Solutions
- Oracle's PeopleSoft Enterprise Staffing Front Office
- Oracle's PeopleSoft Enterprise Supply Chain Management

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**Note.** This documentation may refer to both Oracle's PeopleSoft Enterprise Portal Solutions and to PeopleSoft PeopleTools portal or portal technologies. PeopleSoft Enterprise Portal Solutions is a separate application product. The PeopleSoft PeopleTools portal technologies consist of PeopleSoft Pure Internet Architecture and the PeopleSoft PeopleTools portal technology used for creating and managing portals.

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See <http://www.oracle.com/applications/peoplesoft-enterprise.html> for a list of PeopleSoft Enterprise products.

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## Related Information

Oracle provides reference information about PeopleSoft PeopleTools and your particular PeopleSoft application. The following documentation is available on Oracle Technology Network:

- Enterprise PeopleTools PeopleBook: Getting Started with PeopleTools for your release. This documentation provides a high-level introduction to PeopleTools technology and usage.
- PeopleSoft Enterprise Application Fundamentals PeopleBook for your PeopleSoft application and release. This documentation provides essential information about the setup, design, and implementation of your PeopleSoft application.

See <http://www.oracle.com/technology/documentation/psftent.html> to access PeopleSoft PeopleBooks on Oracle Technology Network.

To install additional component software products for use with PeopleSoft products, including those products that are packaged with your PeopleSoft products, you should refer to the documentation provided with those products, as well as this documentation.

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## Comments and Suggestions

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

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# CHAPTER 1

## Installing PeopleSoft CRM 9.1 Applications

This chapter discusses:

- Understanding the PeopleSoft CRM Installation
- Using Oracle E-Delivery to Obtain Installation Files
- 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
- Configuring Computer Telephony Integration
- Activating Basic Data Summary and Messaging
- Setting Up the PeopleSoft Integration Broker
- Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture

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### Understanding the PeopleSoft CRM Installation

This guide explains the steps necessary to install PeopleSoft Enterprise Customer Relationship Management (CRM) 9.1 applications. Perform the steps in this guide after you have successfully completed the PeopleSoft Enterprise PeopleTools installation, as described in the PeopleSoft Enterprise PeopleTools 8.50 Installation guide for your database platform.

See PeopleSoft Enterprise PeopleTools 8.50 Installation, for your database platform, on My Oracle Support.

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 for customers upgrading or implementing a new release who want to ensure that they have the latest updates and fixes, before or shortly after going 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.

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**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index, found on My Oracle Support, to determine which PeopleSoft 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 9.1 Product-to-PeopleBook Index, on My Oracle Support.

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## Task 1-1: Using Oracle E-Delivery to Obtain Installation Files

Before beginning the installation, you must obtain the PeopleSoft CRM 9.1 installation software by downloading the necessary zip files from the Oracle E-Delivery web site. Use the documentation available on E-Delivery to ensure that you obtain all of the zip files required for your environment.

See <http://edelivery.oracle.com>

This installation guide, and the Oracle E-Delivery web site, refer to the zip files that you download as *media packs*.

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## Task 1-2: Installing PeopleSoft PeopleTools and Databases

This section discusses:

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

### Task 1-2-1: Installing PeopleSoft PeopleTools

Install PeopleSoft PeopleTools as described in the “PeopleSoft Enterprise PeopleTools 8.50 Installation Guide” for your database platform.

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide, (for your database platform), on My Oracle Support.

PeopleSoft CRM requires that you specify a process scheduler server to be used 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 8.50 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 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft Enterprise CRM Workflow."

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**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 or compile or link any COBOL programs.

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**Note.** PeopleSoft People Tools release 8.50 with minimum patch level 01 or higher is required at Install or Upgrade.

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**Note.** Asian language (Simplified Chinese, Traditional Chinese, Korean and Japanese) customers are required to install PeopleSoft PeopleTools 8.50 Patch 11 or higher after installing the CRM91 multilingual media pack.

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**Note.** For the additional component software that writes to PS\_HOME, if you are setting up your PS\_HOME as a *read-only* environment, the Application Server Administrator must have read and write access to PS\_HOME.

For information on setting up PS\_HOME as a *read-only* environment, see *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*, “Securing PS\_HOME and PS\_CFG\_HOME.”

---

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

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

Platform	Approximate Database Size
DB2 LUW Ansi	8.0 GB
DB2 LUW Unicode	11 GB
DB2 z/OS Ansi	7.8 GB
DB2 z/OS Unicode	8.2 GB
Microsoft SQL Server Ansi	1.4 GB
Microsoft SQL Server Unicode	1.96 GB
Oracle Ansi	12 GB
Oracle Unicode	12 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 Windows as *DB2/LUW*.

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

american.iso88591

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## Task 1-2-3: Creating and Configuring a Search Collection on UNIX

To enable users 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 entered on the search page.
2. Configure UNIX servers to locate the PeopleSoft CRM search collection.

You 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 1-3: Setting Up the PeopleSoft CRM Database

This section discusses:

- Loading Active Analytics Framework Data

### Task 1-3-1: Loading Active Analytics Framework Data

To load Active Analytics Framework (AAF) data into the PeopleSoft CRM 9.1 databases:

1. Connect to the PeopleSoft CRM 9.1 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 AAF 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 `crm_aaf_import_xxx.dms` to import this data.

---

---

## Task 1-4: Configuring an FTP Server for Storing Attachments

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

To set the URLs for file attachments:

1. Set up an FTP server for storing the attachments.  
There are no special requirements; any standard FTP server will do.
2. Log in to PeopleSoft using a user ID that gives you access to the PeopleSoft PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.

The URL Maintenance Search page appears.

4. Click the Search button to display and select from a list of URL Identifiers.

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, as shown in the following example:

Find an Existing Value
Add a New Value

Maximum number of rows to return (up to 300):

**Search by:**  begins with

[Advanced Search](#)

### Search Results

[View All](#)
First  1-100 of 104  [Last](#)

<a href="#">URL Identifier</a>	<a href="#">Description</a>
<a href="#">CDM BASE URL</a>	CDM base URL
<a href="#">CO COMMON DASH URL</a>	Common Dashboard placeholder
<a href="#">CRM FILE INDEXES</a>	CRM File System Indexes
<a href="#">EODI XFR DATA</a>	Desktop Integration Files
<a href="#">FEDEX TRACK</a>	Tracking URL for FedEx
<a href="#">FILEDB</a>	System attachment table
<a href="#">FILEDB XMLP</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="#">OCD ORDER DASH URL</a>	Order Dashboard placeholder
<a href="#">PPM MONITOR</a>	PPM Monitor URL
<a href="#">PPM PPMI</a>	PPM Interface URL
<a href="#">PSXP DESKTOP</a>	XMLP Desktop Client Tool
<a href="#">PSXP RUNNER</a>	XML Publisher Report Runner
<a href="#">PTFP DOCINDB</a>	Feed Pub Wizard Attachments
<a href="#">PTMSF INSTALL</a>	Mobile Client Install Package
<a href="#">PT_CDB_WEB_ACTIVE_STUDIO</a>	Dashboard Active Studio

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 Enterprise CRM and Oracle's PeopleSoft Enterprise Supply Chain Management.

See *PeopleSoft Enterprise Integrated FieldService 9.1 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, as shown in the following example:

URL Maintenance	
URL Identifier:	RA_ATTACHMENTS
*Description:	<input type="text" value="Campaign Management Attachment"/>
*URL:	<input type="text" value="ftp://anonymous:anonymous@adas0136.peoplesoft.com/crm/"/>
Comments:	<input type="text" value="Campaign Management Attachment"/>

URL Maintenance page - URL Identifier: RA\_ATTACHMENTS page

See *PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities."

---

## Task 1-5: Setting Start Values for Auto-Numbered Fields

Set the starting value for objects that use the Last Number Setup page (instead of the Auto-numbering page) to generate auto-numbered IDs as follows:

1. Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers.  
The Last Numbers Setup page appears.
2. Click the Refresh All Last Numbers button on the Last Number Setup page, as shown in the following example.

**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	20,339	
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018	
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,100	
BSAN	Branch Script Answer Set	RC_ANSWER_SET	RC_ANSWERSET_ID	11,000,157	
BSAS	Branch Script Action Set	RC_BS_ACTIONSET	RC_BS_ACTIONSET	300,096	
BSIN	Branch Script Instance	RC_BS_INSTANCE	RC_BS_INSTANCE	20,576	
BSPT	Branch Script Path ID	RC_BS_TREE	BS_PATH_ID	302,287	
BSQU	Branch Script Question	RC_QUESTION	QUESTION_ID	300,516	
BTYP	Business Object Type	BO_TYPE	BO_TYPE_ID	20,001	
CASE	Case	RC_CASE	CASE_ID	220,514	
CMP	Contact Method Purpose	CM_PURP_TYPE	CM_PURPOSE_TYPE	20,001	
CMT	Contact Method Type	CM_TYPE	CM_TYPE_ID	20,001	

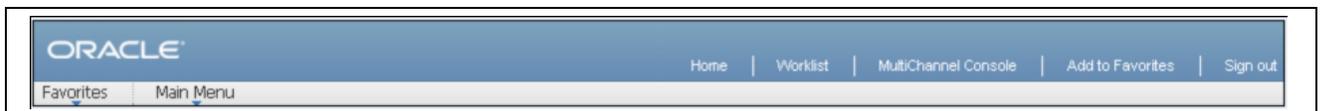
Last Number Setup page

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

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting General Options."

## 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, as shown in the following example:



Oracle panel with the MultiChannel Console header link

See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Configuring CTI Application Pages."

## 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 required if you are installing Oracle's PeopleSoft Marketing or PeopleSoft OLM applications.

See "Installing PeopleSoft Online Marketing 9.1."

## Task 1-8: Setting Up the PeopleSoft Integration Broker

This section discusses:

- Configuring the Gateway URL
- Setting Up the Service Configuration for Web Services
- Activating the PeopleSoft Integration Broker Domain
- Setting Default User IDs on Internal PeopleSoft Integration Broker Nodes

Perform the tasks in this section to enable the publishing and receiving of messaging and web services between the PeopleSoft CRM system and other PeopleSoft modules and integration partners.

### Task 1-8-1: Configuring the Gateway URL

To configure the PeopleSoft Gateway URL:

1. Log in to PeopleSoft Pure Internet Architecture and select PeopleTools, Integration Broker, Configuration, Quick Configuration.

The Integration Broker Quick Configuration page appears, as shown in the following example:



Integration Broker Quick Configuration page

2. Complete the URL by replacing the `<webserver:port>` tokens with your Gateway webserver name and port.
3. Click Save. You will receive the message "The Gateway URL has changed. Connector information will be refreshed." Click OK.
4. Click Ping gateway. The PeopleSoft Integration Gateway page should appear in a new browser window, as shown in the example that follows. Close the window.

# PeopleSoft Integration Gateway

PeopleSoft Listening Connector

Tools Version : 8.50

Status: ACTIVE

PeopleSoft Listening Connector page

- Click the Advanced Gateway Setup link to open the Gateways page, as shown in the following example:

Gateways page

- Click the Gateway Setup Properties link. The system prompts you to enter a User ID and Password. In the User ID field, enter *administrator*, and in the Password field, enter *password*.

The PeopleSoft Node Configuration page appears.

- On the PeopleSoft Node Configuration page, populate the Default Appserver value with your Application Server name and Port. Enter the User ID and Password of a SuperUser in your system (typically *PS/PS* or *VPI/VPI*). Enter the complete PeopleSoft PeopleTools version you are running. For example, *8.50.1*.
- In the PeopleSoft Nodes section, specify the local node name (*PSFT\_CR*), as shown in the following example:

App Server URL	User ID	Password	Tools Release
//ADAS0180:9000	VP1	****	8.50

Node Name	App Server URL	User ID	Password	Tools Release
PSFT_CR	//ADAS0180:9000	VP1	****	8.50

PeopleSoft Node Configuration page

- Follow the instructions in step 7 to configure the remaining fields for the local node, and then click Save.
- Click the Ping Node button on the Local Node and verify that it returns a response of *Success*, as shown in the following example:



Ping Node Results page

11. Verify that the *SecureFileKeyStorePasswd* is correct and encrypted:

- a. Log in to PeopleSoft Pure Internet Architecture. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.
- b. Click the Advanced Gateway Setup link on the Integration Broker Quick Configuration page to access the Gateways page.
- c. Click the Gateway Setup properties link and log in.
- d. Click the Advanced Properties Page link.

The Gateway Properties page appears.

- e. Use the Password Encryption Utility to encrypt the password.
- f. On the Gateway Properties page, edit the following lines to update the *secureFileKeystorePasswd* with your integration gateway properties password information:

The default value is *password*.

```
#secureFileKeystorePath=<fileLocation>
```

```
#secureFileKeystorePasswd=<password>
```

```
#change your ps_home directory
```

```
secureFileKeystorePath= ps_home/webserv/peoplesoft/keystore/pskey
```

```
secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==
```

Where {V1.1}7m4OtVwXFNyLc1j6pZG69Q== is password encrypted. If you are not using the default value password, your encrypted value will be different.

- g. Click OK.
- h. Click Save.

## Task 1-8-2: Setting Up the Service Configuration for Web Services

To set up the service configuration for web services:

1. Select PeopleTools, Integration Broker, Configuration, Quick Configuration, and then click the Service Configuration link.

The Service Configuration page appears, as shown in the following example:

Service Configuration page

2. In the Service Namespace field, enter *urn:oracle.enterprise.crm.service*.
3. In the Schema Namespace field, enter *urn:oracle.enterprise.crm.data*.
4. Complete the Target Location URL, as shown in the previous example, by replacing the *<machine:port>* tokens with your Gateway name and port. If the system prompts you to update UDDI servers, click Yes.
5. Click Save.

### Task 1-8-3: Activating the PeopleSoft Integration Broker Domain

To activate the PeopleSoft Integration Broker domain:

1. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.  
Click the Domain Status link to access the Domain Status page.
2. Verify that there is a PeopleSoft PeopleTools 8.50 Domain available and that the Domain Status field is set to *Active*.  
If *Inactive*, select *Active* from the Status drop-down list, as shown in the following example:

Domain Status page

3. Click Save.

## Task 1-8-4: Setting Default User IDs on Internal PeopleSoft Integration Broker Nodes

The PeopleSoft system uses the default user ID on the internal PeopleSoft Integration Broker nodes to determine the level of security access allowed to inbound service requests that are received by the PeopleSoft Integration Broker. If an inbound service requests attempts to access a service operation or component interface that the default user ID does not have privileges for, the service request will be denied.

---

**Note.** It is important that the default user ID has security privileges to all web services that you intend to use. One way to easily accomplish this is to select a default user ID with *AllPages* and *All Webservices* access, often referred to as a *SuperUser*. Typical examples are *PS/PS* or *VPI/VPI*.

---

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the *ANONYMOUS* node. Update the Default User ID field to a valid user ID that has the appropriate level of security privileges.
3. Click Save.
4. Search for and open the *PSFT\_WEB\_SERVICE* node. Update the Default User ID field to a valid user ID that has the appropriate level of security privileges.
5. Click Save.
6. Restart your web server and application server and clear the cache.

---

## Task 1-9: Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture

This section discusses:

- Setting Up and Configuring the Webserver
- Modifying the Proxy Server Setting in the setEnv File
- Updating Gateway Properties
- Defining Installation Options
- Setting Up the Cybersource PSFT\_CYB Node
- Testing Connectivity

Perform the tasks in this section to set up and test connectivity with Cybersource using PeopleSoft Integration Broker SOAP messaging for authorizations.

### Task 1-9-1: Setting Up and Configuring the Webserver

#### Understanding Setting Up and Configuring the Webserver

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture:

Copy the SSL certificate that Cybersource provides when you sign up for their service into the webserver Keystore directory. The procedure for doing this varies, depending on whether you are using Oracle WebLogic or IBM WebSphere, and where your webserver is running – Microsoft Windows or UNIX. Choose the appropriate section from the following:

### Setting Up an Oracle WebLogic Server on Microsoft Windows

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an Oracle WebLogic webserver on Microsoft Windows:

1. Copy the SSL certificate to the webserver keystore directory.

The keystore directory is located at: `<PS_HOME>\webserv\<DOMAIN_NAME>\keystore`

2. Open a CMD (command) prompt and navigate to the keystore directory.
3. Enter this command:

```
<PS_HOME>\jre\bin\keytool -keystore pskey -import -alias entrust_ssl_ca -file=>
<PS_HOME>\webserv\<DOMAIN_NAME>\keystore\entrust_ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password*.
5. Enter *yes* to trust the certificate.

### Setting Up an Oracle WebLogic Server on UNIX

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an Oracle WebLogic webserver on UNIX:

1. Copy the SSL Certificate to the webserver keystore directory.

The keystore directory is located at: `<PS_HOME>/webserv/<DOMAIN_NAME>/keystore`

2. From a UNIX prompt, navigate to the keystore directory.
3. Enter this command:

```
<PS_HOME>/jre/bin/keytool -keystore pskey -import -alias entrust_ssl_ca -file
<PS_HOME>/webserv/<DOMAIN_NAME>/keystore/entrust_ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password*.
5. Enter *yes* to trust the certificate.

### Setting Up an IBM WebSphere Server on Microsoft Windows

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an IBM WebSphere webserver on Microsoft Windows:

1. Copy the SSL certificate to the webserver keystore directory.

The keystore directory is located at:

```
<PS_HOME>\webserv\<DOMAIN_NAME>\installedApps\<DOMAIN_NAME>NodeCell\<DOMAIN_=>
NAME>.ear\keystore
```

2. Open a CMD (command) prompt and navigate to the keystore directory.
3. Enter this command:

```
<PS_HOME>\jre\bin\keytool -keystore pskey -import -alias entrust_ssl_ca -file=>
```

```
<PS_HOME>\webserv\<DOMAIN_NAME>\installedApps\<DOMAIN_NAME>NodeCell\<DOMAIN_=>
NAME>.ear\keystore\entrust_ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password*.
5. Enter *yes* to trust the certificate.

## Setting Up an IBM WebSphere Server on UNIX

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an IBM WebSphere webserver on UNIX:

1. Copy the SSL certificate to the webserver keystore directory.

The keystore directory is located at:

```
<PS_HOME>/webserv/<DOMAIN_NAME>/installedApps/<DOMAIN_NAME>NodeCell/<DOMAIN_=>
NAME>.ear/keystore
```

2. From a UNIX prompt, navigate to the *<DOMAIN\_NAME>.ear* directory located at:

```
<PS_HOME>/webserv/<DOMAIN_NAME>/installedApps/<DOMAIN_NAME>NodeCell/<DOMAIN_=>
NAME>.ear
```

3. Enter this command:

```
pskeymanager.sh -import -alias entrust_ssl_ca -file <PS_HOME>/webserv/<DOMAIN_=>
NAME>/installedApps/<DOMAIN_NAME>NodeCell/<DOMAIN_NAME>.ear/keystore/entrust_=>
ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password*.
5. Enter *yes* to trust the certificate.

## Task 1-9-2: Modifying the Proxy Server Setting in the setEnv File

This section discusses:

- Configuring setEnv.cmd on Microsoft Windows for Oracle WebLogic or IBM WebSphere
- Configuring setEnv.sh on UNIX for Oracle WebLogic or IBM WebSphere

### Configuring setEnv.cmd on Microsoft Windows for Oracle WebLogic or IBM WebSphere

To configure *setEnv.cmd* on Microsoft Windows for Oracle WebLogic or IBM WebSphere:

If the installation will be running behind a Proxy Server, modify the following proxy server settings in the *setEnv.cmd* file that is located at:

For Oracle WebLogic: *<PS\_HOME>\webserv\<DOMAIN\_NAME>\bin*

For IBM WebSphere: *<PS\_HOME>\webserv\<DOMAIN\_NAME>\installedApps\<DOMAIN\_>
NAME>NodeCell\<DOMAIN\_NAME>.ear*

```
SET ENABLE_HTTP_PROXY=true
SET HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>
SET HTTP_PROXY_HTTPPORT=<PROXY_PORT>
```

```
SET HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>
SET HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

### Configuring setEnv.sh on UNIX for Oracle WebLogic or IBM WebSphere

To configure the IBM WebSphere webserver *setenv.cmd* on Microsoft Windows and *setenv.sh* file on UNIX:

If the installation will be running behind a Proxy Server, modify the following proxy server settings in the *setEnv.sh* file that is located at:

For Oracle WebLogic: <PS\_HOME>/webserv/<DOMAIN\_NAME>/bin

For IBM WebSphere: <PS\_HOME>/webserv/<DOMAIN\_NAME>/installedApps/<DOMAIN\_NAME>NodeCell/<DOMAIN\_NAME>.ear

```
export ENABLE_HTTP_PROXY=true
export HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>
export HTTP_PROXY_HTTPPORT=<PROXY_PORT>
export HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>
export HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

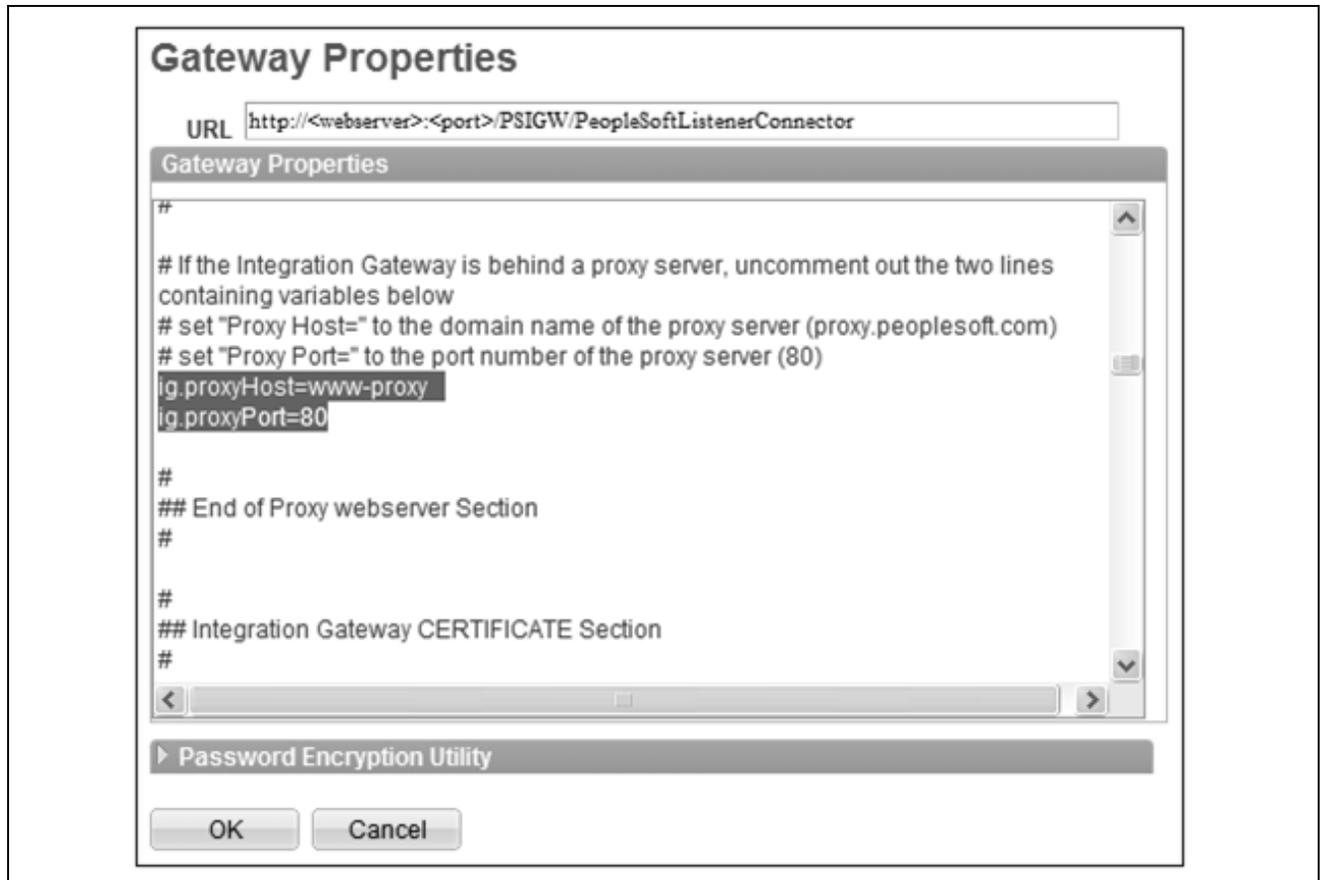
### Task 1-9-3: Updating Gateway Properties

To update gateway properties:

Add proxy settings and ensure that the *SecureFileKeyStorePasswd* is correct and encrypted as follows:

1. Log in to PeopleSoft Internet Pure Architecture. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.
2. Click the Advanced Gateway Setup link on the Integration Broker Quick Configuration page to access the Gateways page.
3. Click the Gateway Setup properties link and log in.
4. Click the Advanced Properties Page link.

The Gateway Properties page appears, as shown in the following example:



Gateway Properties page

5. If the installation will be running behind a proxy server, on the Gateway Properties page, edit the following lines by entering your proxy servers and port information:

```
## Proxy webserver section
```

```
# If the Integration Gateway is behind a proxy server, uncomment out the two⇒
lines containing variables below
```

```
# set "Proxy Host=" to the domain name of the proxy server ⇒
(proxy.peoplesoft.com)
```

```
# set "Proxy Port=" to the port number of the proxy server (80)
```

```
ig.proxyHost=<YOUR_PROXY_SERVER>
```

```
ig.proxyPort=<PROXY_PORT>
```

6. Use the Password Encryption Utility to encrypt the password as follows:

In the Gateway Properties page, edit the following lines to update the *secureFileKeystorePasswd* with your integration gateway properties password information:

The default value is *password*.

```
#secureFileKeystorePath=<fileLocation>
#secureFileKeystorePasswd=<password>
secureFileKeystorePath=ps_home/webserve/peoplesoft/keystore/pskey
secureFileKeystorePasswd={V1.1}7m40tVwXFNyLc1j6pZG69Q==
```

Where {V1.1}7m40tVwXFNyLc1j6pZG69Q== is password encrypted. If you are not using the default value password, your encrypted value will be different.

7. Click OK.
8. Click Save.

## Task 1-9-4: Defining Installation Options

To define your Cybersource installation options:

1. Select Setup CRM, Install, Installation Options.

The Installation Options page appears, as shown in the following example:

Example of Installation Options - Credit Card Options page

2. On the Installation Options Page, enter your Cybersource Merchant ID and Merchant Key.

These credentials are used to authenticate your account identity during authorizations and are provided by Cybersource when you sign up for their service.

Go to [www.Cybersource.com](http://www.Cybersource.com) for details on creating and activating a service account. No charge evaluation accounts for preliminary testing are also available.

## Task 1-9-5: Setting Up the Cybersource PSFT\_CYB Node

To set up the Cybersource PSFT\_CYB node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Open the Cybersource additional component (third-party) node PSFT\_CYB, and then select the Connectors tab to access the Connectors page, as shown in the following example:

Node Name PSFT\_CYB Ping Node

Details

Gateway ID: LOCAL

Connector ID: HTTPTARGET

Properties

Property ID	Property Name	Required	Value
1	sendUncompressed	<input checked="" type="checkbox"/>	Y
2	Content-Type	<input type="checkbox"/>	text/xml; charset=utf-8
3	Method	<input checked="" type="checkbox"/>	POST
4	URL	<input checked="" type="checkbox"/>	https://ics2wstest.ic3.com/comme

Save

## Connectors page

Enter the following values as shown in this example:

- a. In the Gateway ID field, enter *Local*.
  - b. In the Connector ID field, enter *HTTPTARGET*.
  - c. In the Property ID field 1, enter *HEADER*.
  - d. In the Property Name field 1, enter *Content-Type*.
  - e. In the Property Value field 1, enter *text/xml; charset=utf-8*.
  - f. In the Property ID field 2, enter *HEADER*.
  - g. In the Property Name field 2, enter *sendUncompressed*.
  - h. In the Property Value field 2, enter *Y*.
  - i. In the Property ID field 3, enter *HTTPPROPERTY*.
  - j. In the Property Name field 3, enter *Method*.
  - k. In the Property Value field 3, enter *POST*.
  - l. In the Property ID field 4, enter *PRIMARYURL*.
  - m. In the Property Name field 4, enter *URL*.
  - n. In the Property Value field 4, enter: *https://ics2wstest.ic3.com/commerce/1.x/transactionProcessor*.  
This is the Cybersource testing server URL. Your production server URL will be different. Both URLs are also available on the Cybersource website.
  - o. Click Save.
3. Click the Ping Node button.  
If you do not receive a successful message, verify that your Proxy settings are entered on the webserver.
  4. Select the Routings Tab to access the Routings page and open the Routing Definition for CCI\_TO\_CYBERSOURCE, as shown in the following example:

Service Operation:	EOEC_CCI_SYNC
Service Operation Version:	VERSION_1
Sender Node:	PSFT_CR
Receiver Node:	PSFT_CYB

Parameters	
Type:	Inbound Response
External Alias:	EOEC_CCI_SYNC.VERSION_1
	<a href="#">Alias References</a>
Message.Ver into Transform 1:	<input type="text"/>
Transform Program 1:	CYB_SOAP_REQ
Transform Program 2:	<input type="text"/>
Message.Ver out of Transforms:	EOEC_CCI_RESPONSE.VERSION_1

Type:	Outbound Request
External Alias:	EOEC_CCI_SYNC.VERSION_1
	<a href="#">Alias References</a> <a href="#">WS Security</a>
Message.Ver into Transform 1:	EOEC_CCI_SYNC.VERSION_1
Transform Program 1:	CYB_SOAP_REQ
Transform Program 2:	<input type="text"/>
Message.Ver out of Transforms:	<input type="text"/>

#### Routings page

Verify that the Parameters tab is set up with the Transform programs as shown in this example.

5. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
6. Open the Service Operation Definition for EOEC\_CCI\_SYNC and ensure that the Active check box is selected.
7. Select the Routings tab to access the Routings page, as shown in the following example:

Service Operation: EDEC\_CCI\_SYNC  
 Default Version: VERSION\_1  
 User Exception

Note: This user exception status is applicable only if an outbound routing cannot be determined. If a valid outbound routing can be determined then the user exception status on the actual routing will be used.

Routing Name:

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input type="checkbox"/>	CCI_TO_CYBERSOURCE	VERSION_1	Synch	PSFT_CR	PSFT_CYB	Outbound	Active	
<input type="checkbox"/>	EDEC_CCI_SYNC_OUT	VERSION_1	Synch	PSFT_CR	PSFT_XOUTBND	Outbound	Inactive	

[Return to Search](#)

Routings page

8. Ensure that only the CCI\_TO\_CYBERSOURCE routing is set to a Status of *Active*.
9. Click the Handlers tab and ensure that the handler Status drop-down is set to *Active*.
10. Click Save.

## Task 1-9-6: Testing Connectivity

To test Cybersource connectivity:

1. Select Enterprise Components, Component Configurations, Credit Card Interface, Test Credit Card Interface, click Add a New Value, and click Add.
2. Click the Card Entry/Display tab to access the Credit Card Entry and Display Test page.
3. Enter the test values, as shown in the following example:

Card Entry/Display Transaction

### Credit Card Entry/Display Test

**Credit Card Information**

Card Type:  Card Number:

Exp. Month:  Expiration Year:  Card Verification Number:

First Name:  Last Name:

**Test Results**

Credit Card Entry/Display Test page

- Select *VISA* from the Card Type drop-down list box.

- In the Card Number field, enter *4111111111111111*.
- Select *09-Sep* from the Exp. Month drop-down list box.
- Select *2010* from the Expiration Year drop-down list box.
- In the Card Verification Number field, enter *999*.
- In the First Name field, enter *Joe*.
- In the Last Name field, enter *Tester*.

4. Select the Transaction Tab to access the Transaction page, as shown in the following example:

Transaction page

5. In the Description field, enter *Test*.
6. In the Amount field, enter *100.00*.
7. In the Currency field, enter *USD*.
8. Select *ProcessBrokerTransaction* from the Class ID drop-down list box.
9. Click the Process button.

The authorization result values appear in the Token and Test Results fields.



## CHAPTER 2

# Installing PeopleSoft Correspondence Management

This chapter discusses:

- Understanding PeopleSoft Correspondence Management
- Identifying and Configuring FTP Servers
- Copying RTF and Text Template to the FTP Server
- Registering the FTP Servers
- Installing Additional Component Software — Xpdf
- Configuring User Selected Font for XMLP
- 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 applications required for PeopleSoft Correspondence Management functionality within Oracle's PeopleSoft Enterprise CRM applications. Perform the following installation-related tasks to leverage these features provided by PeopleSoft Correspondence Management:

- 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 9.1 Product-to-PeopleBook Index found on My Oracle Support, 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 9.1 Automation and Configuration Tools PeopleBook*, "Correspondence Management."

---

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

The FTP servers are used to physically store correspondence templates and finished documents. These servers are used to store other PeopleSoft Correspondence Management-related documents as well, such as intermediary XML files created by the PeopleSoft Correspondence Management-specific processes.

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

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

After identifying the server and the folders where the documents will be stored, the locations of these servers must be specified in the form of URLs.

The PeopleSoft Correspondence Management functionality works with five types of documents:

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

If all of these document types are stored under a single folder on a FTP server, you only have to create a single URL in the procedure that follows. If these documents are stored under different folders on either a 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 the 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, as shown in the following example:

**URL Maintenance**

**URL Identifier:** RB\_CORRMGT

**\*Description:** Correspondence Management

**\*URL:** ftp://anonymous:anonymous@ADNTTP28/CRM/TEST/

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

URL Maintenance page

See *PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities."

---

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

New PeopleSoft Correspondence Management customers will need to 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 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 Replace button in the grid.
4. Select your \*.rtf file.
5. Save the template.

Existing PeopleSoft Correspondence Management customers, if they have \*.doc files associated with their templates, will need to replace their \*.doc files with \*.rtf files. In the new PeopleSoft Correspondence Management infrastructure, \*.doc files and templates are not supported. All \*.doc files must be converted to \*.rtf files and uploaded to the FTP server.

To convert older \*.doc files to \*.rtf files:

---

**Note.** Perform this task only if you are upgrading from PeopleSoft CRM 8.9 to PeopleSoft CRM 9.1 or you have older formatted templates (.doc and .txt). PeopleSoft Correspondence Management only supports Rich Text (.rtf) and plain text (.txt) formatted templates. You can use Microsoft Word to open, convert, and then upload the new .rtf templates to the FTP server.

---

1. Using Microsoft Word, open each of your existing templates (\*.doc files, these files may be located in \$PS\_HOME/appserv/CorrespondenceManagement/templates) and click the Replace button to re-save them as \*.rtf files.

You can keep the same name, just change the format of the file.

2. After the \*.rtf file is created, open the corresponding .rtf template, upload the *new* \*.rtf file to the FTP server, and then delete the old \*.doc file from the template grid.
3. Save the .rtf Template.

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

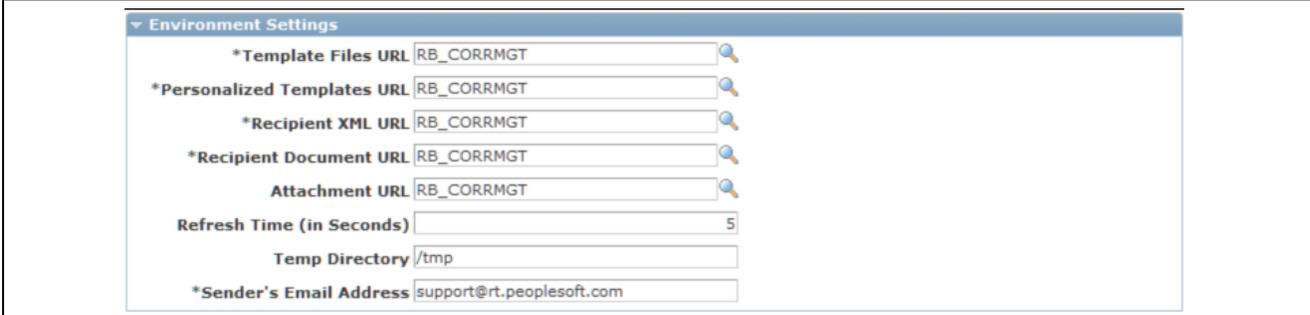
## Task 2-3: Registering the FTP Servers

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

- Template files
- Personalized templates
- Recipient XML
- Recipient document
- Attachment

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 values for the environment settings, as shown in the following example:



Environment Settings	
*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

- In the Template File URL field, enter *RB\_CORRMGT*.
- In the Personalized Templates URL field, enter *RB\_CORRMGT*.
- In the Recipient XML URL field, enter *RB\_CORRMGT*.
- In the Recipient Document URL field, enter *RB\_CORRMGT*.
- In the Attachment URL field, enter *RB\_CORRMGT*.

You can have unique values for each of the URL files. To do this, you must create more URL definitions to point to the different FTP servers. Then add those URL definitions as the values for each of the URL file fields.

## See Also

*PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Defining Settings for Template-Based Correspondence."

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

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

When you have obtained the software, you can install it anywhere on the application server machine. You will update a configuration file to point to the Xpdf executable file. This configuration file is called *cm.properties* and is located at: `<PS_HOME>\Appserv\CorrespondenceManagement\config\cm.properties`

The following is an example of a PeopleSoft Correspondence Management configuration file that shows *cm.logFolder* and *pdf2ps.command* as the values of concern:

```

cm.properties *
#####
# Correspondence Management Configuration File #
#####

##### Log4j Configuration - Start #####
cm.logFolder = d:/peopletools/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-3.00p13-win32/pdftops.exe -paper match
##### PDF to PS Conversion Command - End #####

```

PeopleSoft CM properties

- `cm.logFolder`

Replace `d:/pt<release number>/cm/log/` with the path of your choice to put all log files relating to PeopleSoft Correspondence Management runtime data. For each CM transaction, a log file is generated 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: Configuring User Selected Font for XMLP

In this tasks, you will modify the `<PS_HOME>\appserv\CorrespondenceManagement\config\xdo.cfg`

1. Remove these two lines:

```
<!-- Font setting for convert OF to PDF
-->
```

2. List all user desired fonts as the child node of `<font>`, as in the following example:

```
<font family="Arial Narrow" style="normal" weight="normal">
  <truetype path="C:/WINDOWS/Fonts/ARIALN.TTF" />
</font>
```

3. Replace the font `ARIALN.TTF` to user desired one.

```
<config version="1.0.0" xmlns="http://xmlns.oracle.com/oxp/config/">
  <properties>
    <font>
      <font family="Arial Narrow" style="normal" weight="normal">
        <truetype path="C:/WINDOWS/Fonts/ARIALN.TTF" />
      </font>
      <font family="Garamond" style="normal" weight="normal">
        <truetype path="C:/WINDOWS/Fonts/GARA.ttf" />
      </font>
    </font>
  </properties>
</config>
```

---

## Task 2-6: 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. These sections are populated by default and should not be changed. The sections are:

- **Processing Library**—This section defines the location to the Java files used for PeopleSoft Correspondence Management.

These files are predelivered.

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

When an email fails to be delivered, 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 defined with the predelivered files:

<b>Processing Library</b>	
RTF Conversion Handler	com.peoplesoft.crm.co.cm.RTFConversionXMLP
Document Merge Handler	com.peoplesoft.crm.co.cm.MergeProcessorXMLP
PDF Creation Handler	com.peoplesoft.crm.co.cm.PDFCreationXMLP
RTF Creation Handler	com.peoplesoft.crm.co.cm.RTFCreationXMLP
<b>Processing Options</b>	
<b>Undelivered Emails Options</b>	
Interval for Resend Attempt	2 minutes
Maximum Resend Retries	3
*Worklist	UndeliveredEmailsWorklist
*Attachments URL	RB_CORRMGT

Processing Library page

## Task 2-7: Registering Microsoft Window Printers (Optional)

This installation task is optional, but must be done if you want to print PeopleSoft 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 that are used only for the printing process.

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

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, as shown in the following example:

Printer Information			
*Printer Share Name	\\xyz-print\E4125P		
	<input checked="" type="checkbox"/> Active	Printer ID 1	
*Printer Location	Next to John's office		
Description	Lazer Jet printer used for color printing		
Audit History			
Created	2008/07/31 2:34PM PDT	By lli2	Julie C
Modified	2008/11/04 5:48PM PST	By lli2	Julie C

Printer Information page

3. Save the page.

---

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

---

## Task 2-8: Defining the CLASSPATH for Sun Java Mail Files

The final step ensures that the correct Sun Java Mail class files are used. The class files are located in a JAR file called *mail.jar*, located in the  $\langle PS\_HOME \rangle$ /class directory. This directory contains many JAR files, some also include Sun Java Mail class files. The other releases 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  $\langle PS\_CFG\_HOME \rangle$ /appserv/[domain name]/psappsrv.cfg
- Process Scheduler Server configuration file  
Found in  $\langle PS\_CFG\_HOME \rangle$ /appserv/prcs/[domain name]/psprcs.cfg

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

```
;To add directories or jar files to CLASSPATH for the jvm loaded via JNI, unco
;and set it equal to the list of elements you would like to use.
;The classpath elements need to be seperated using the path seperator specific
;For Example: Add to CLASSPATH=/usr/class:/home/user/class
;Add to CLASSPATH=
```

This should be updated to read:

```
;To add directories or jar files to CLASSPATH for the jvm loaded via JNI, unco
;and set it equal to the list of elements you would like to use.
;The classpath elements need to be seperated using the path seperator specific
;For Example: Add to CLASSPATH=/usr/class:/home/user/class
Add to CLASSPATH= $\langle PS\_HOME \rangle$ /class/mail.jar;
```

where  $\langle PS\_HOME \rangle$  is substituted with the physical drive location (Example: c:\PT<current PeopleTools release number>)

---

**Note.** You must restart the servers after making the change.

---



## CHAPTER 3

# Installing PeopleSoft Online Marketing 9.1

This chapter discusses:

- Understanding PeopleSoft Online Marketing Setup
- Prerequisites
- Configuring PeopleSoft OLM System Parameters
- Setting Up the FTP Server URL for File Upload
- Setting the PS\_FILEDIR Environment Variable
- Setting Up Web Profile to Bypass the Sign-In Page
- Assigning PeopleSoft OLM Self-Service Permissions
- Setting Up PeopleSoft OLM Integration Points
- Installing the DES on the Oracle WebLogic Server
- Installing the DES on an IBM WebSphere Server
- Retrieving and Installing JDBC Drivers
- Cybersource Credit Card Integration Configuration
- Testing the DES Installation
- Testing the Email Server
- Adding Standalone Dialog Servers (Optional)
- Installing Adobe Graphic Dialog Flow Designer
- Setting Up Profiles
- Tuning the System (Optional)

---

## Understanding PeopleSoft Online Marketing Setup

This chapter provides instructions for the installation and set up of Oracle's PeopleSoft Enterprise CRM Online Marketing (OLM) server and related components.

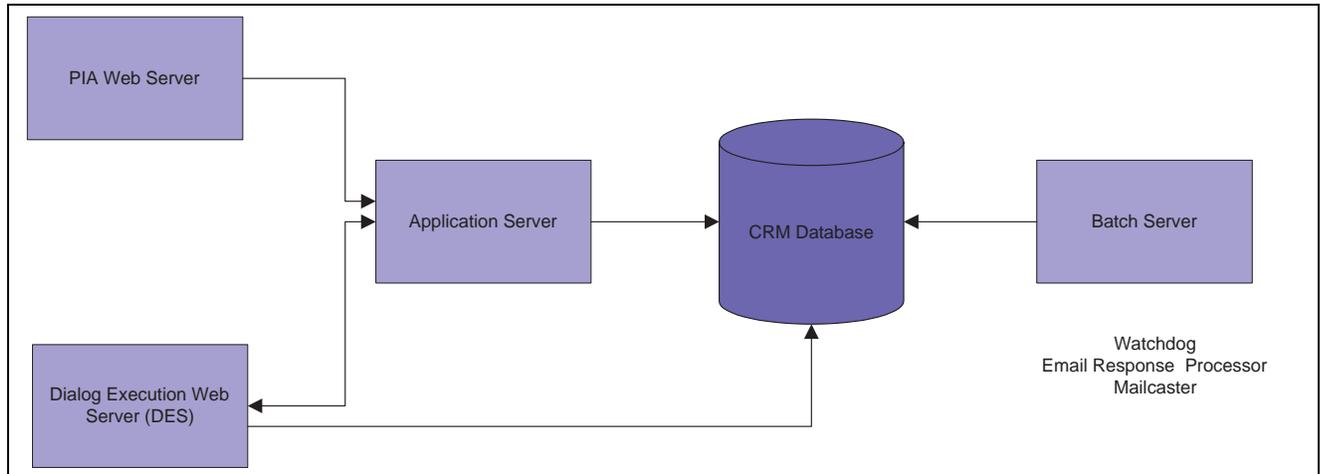
---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index that can be found on My Oracle Support, 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 (such as Oracle 10g).

**Note.** If you are running DB2 LUW from HP-UX and you are going to install a non-Unicode 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 plan to use for the database; that is, export *LANG=en\_US.iso88591*.

2. Install and configure the PeopleSoft CRM 9.1 database and software (PeopleSoft PeopleTools, Oracle 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 9.1 CD.
- Your PeopleSoft CRM environment is fully functional, with the PeopleSoft Application Server, Oracle 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 you make 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
```

PeopleSoft OLM does not run on all hardware and software platforms that PeopleSoft PeopleTools supports. You must ensure that you have compatible hardware and software by reviewing the PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements guide, available on My Oracle Support.

### See Also

Installing the DES on the Oracle WebLogic Server

Installing the DES on an IBM WebSphere Server

"PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements"

---

## 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 discussed in the *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*.

---

To set parameter values:

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

The Dialog Execution Server Settings page appears, as shown in the following example:

Name	*Value		
bulkMailerDropDedup	true	+	-
cgiProgramPath	/DCS/	+	-
companyBasicsProfileName	Companies	+	-
contactBasicsCompanySysIdElementName	Company ID	+	-
contactBasicsProfileName	People	+	-
dedupIndexSpace	[DEFAULT]	+	-
dedupTableSpace	[DEFAULT]	+	-
defaultDateFormat	YYYY-MM-DD	+	-
defaultTimeFormat	HH:MM AM/PM	+	-
defaultURLBase	http://WEBServerDNS	+	-
doNotEMailDefault	false	+	-
doNotEMailProfileElementName	Do Not Email	+	-
emailAddressProfileElementName	Email	+	-
extensionTimeout	45	+	-
isDESMultiInstance	false	+	-

▶ Password Encryption Utility

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 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 Oracle Tuxedo.  
The format is *//appserv.foo.com:9000*
- psToolsRel—The PeopleSoft PeopleTools version of Oracle Tuxedo.  
The format is *8.50*. After every PeopleSoft PeopleTools release or PeopleSoft PeopleTools patch upgrade, you must update this variable.
- 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 (semicolon separated), 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 *DB2UDB*, *ORACLE*, or *MSSQL*.
- dedupIndexSpace—The value depends on the RDBMS.  
For MSSQL set to *[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 (*DES.config*, *MCR.config*, *ERP.config* and *WDG.config*). PeopleSoft OLM always uses the values 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 these 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.

The URL Search page appears.

2. Search for the *RY\_ATTACHMENTS* URL and open it.

The URL Maintenance page appears, as shown in the following example:

## URL Maintenance

**URL Identifier:** RY\_ATTACHMENTS

**\*Description:**

**\*URL:**

**Comments:**

[URL Properties](#)

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.

4. Repeat steps 1 and 2 for *RY\_DRE*. Verify that the *RY\_DRE* 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, as shown in the following example:

## URL Maintenance

**URL Identifier:** RY\_DRE

**\*Description:**

**\*URL:**

**Comments:**

[URL Properties](#)

URL Maintenance page

---

## Task 3-3: Setting the PS\_FILEDIR Environment Variable

The administrator must set the PS\_FILEDIR environment variable on the server where the Process Scheduler is running. This variable is usually set to PS\_HOME\appserv\prcs\*<db\_name>*\files\. This is required in order to write files to the application server and process scheduler server.

Refer to your operating system documentation for information about how to set environment variables.

---

## Task 3-4: Setting Up 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 to bypass the sign-in page:

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 Web Profile parameter (for example, *DEV*).

---

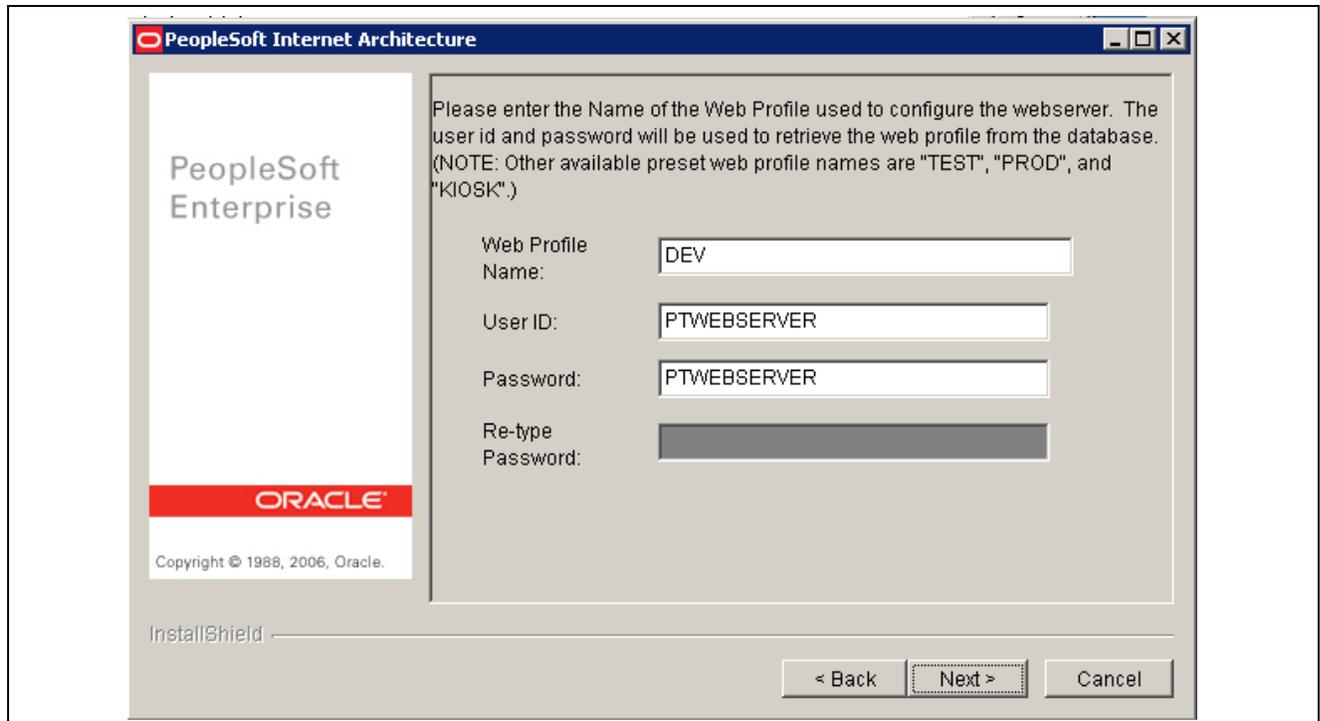
**Note.** The default location of the *configuration.properties* file is:

For PeopleSoft Pure Internet Architecture on Oracle WebLogic and IBM WebSphere:

```
<%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
```

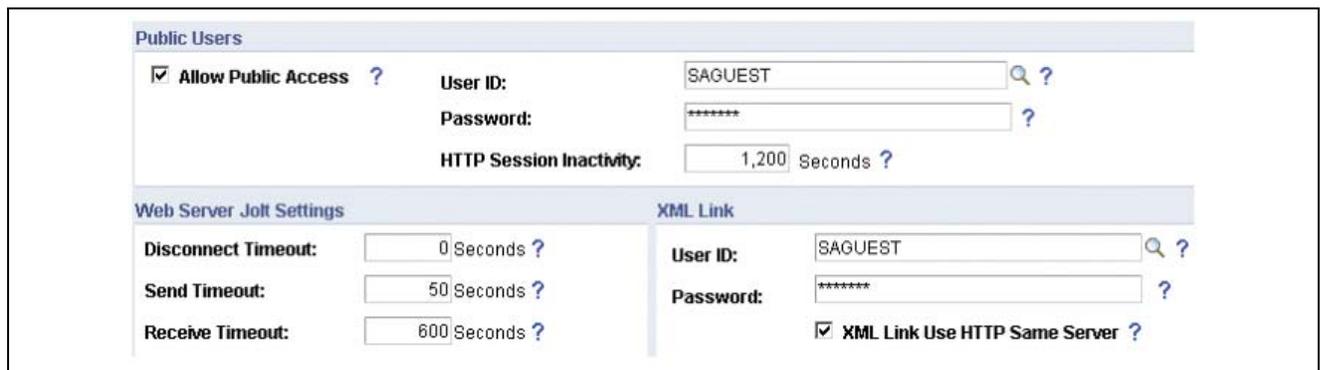
---

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



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, as shown in the following example:



Web Profile page: Security tab

7. In the User ID and Password fields, select *SAGUEST*.
8. Click Save.
9. Restart the PeopleSoft Pure Internet Architecture server.

## Task 3-5: Assigning PeopleSoft OLM Self-Service Permissions

This section discusses:

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

### 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.

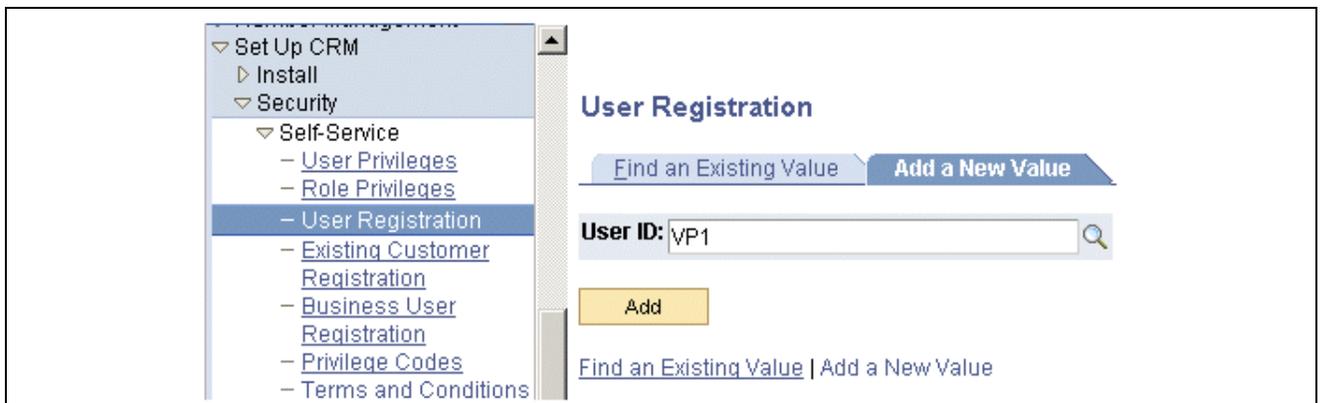
Use the procedures in this section to add new PeopleSoft OLM users as self-service users if:

- 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 3-5-1: 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.
2. Select the Add a New Value tab and enter a user ID (for example, *VP1*), as shown in the following example:



User Registration page: Add a New Value tab

3. Click Add.
4. Refer to the following example of the User Registration Setup page, and then complete the 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	[+]	[-]

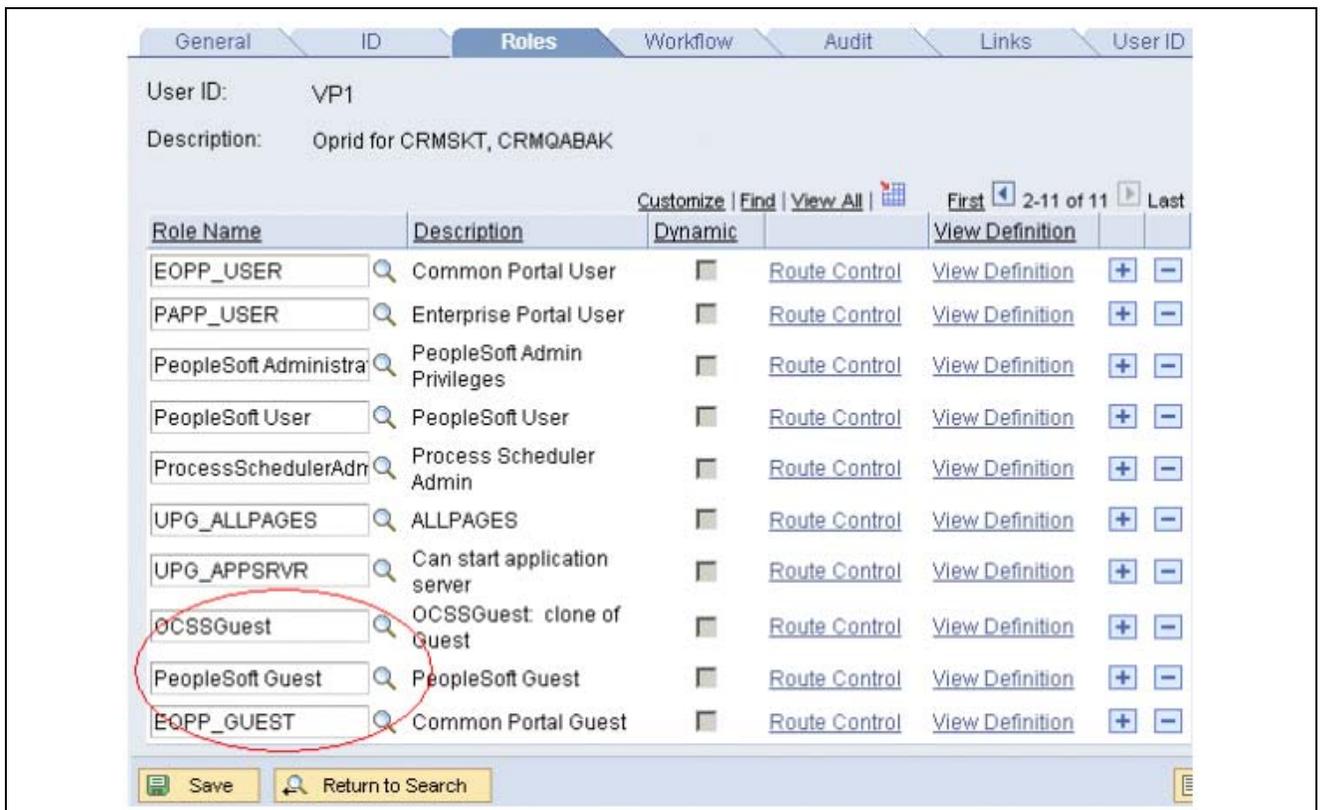
Example of the User Registration Setup page

- 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 *Customer*, *EOPP\_USER*, and *PAPP\_USER*.
5. Click Save.

## Task 3-5-2: Assigning Self-Service Roles to PeopleSoft OLM Users

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 the following 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's name (*100946* or *Template*, *SHAREConsumer*), as shown in the following example:

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 9.1 Business Object Management PeopleBook*.

---

8. Click Save.

## Task 3-6: 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 the 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 3-6-1: 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:

[New Window](#) | [Customize Page](#)

**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 [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-2 of 2 | [Last](#)

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 3-6-2: 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.

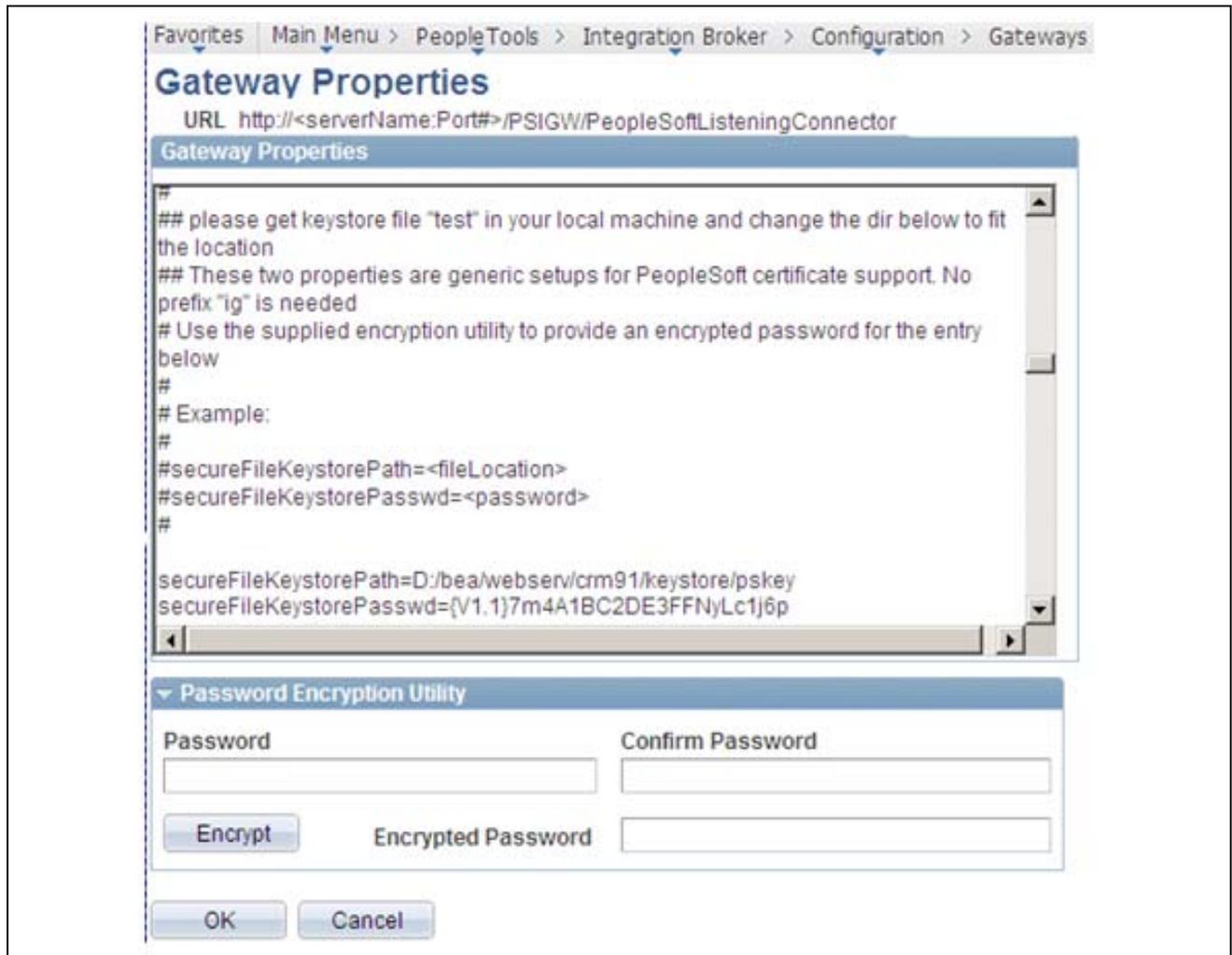
1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for and open the Local Gateway.
3. Click the Gateway Setup Properties link, and then login to the Gateway Properties.
4. Click the Advanced Properties link, then locate the property `secureFileKeystorePasswd` and verify that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

The following example shows the Gateway Properties - Advanced Properties page with the Password Encryption utility and an encryption example:



Gateway Properties - Advanced Properties page

### Task 3-6-3: 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, Nodes.
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 3-7: Installing the DES on the Oracle WebLogic Server

This section discusses:

- Understanding DES Installation on Oracle WebLogic
- Installing DES on Oracle WebLogic for MS Windows
- Installing the DES on Oracle WebLogic on UNIX
- Modifying the setEnv.sh
- Starting the DES on an Oracle WebLogic Server

### Understanding DES Installation on Oracle WebLogic

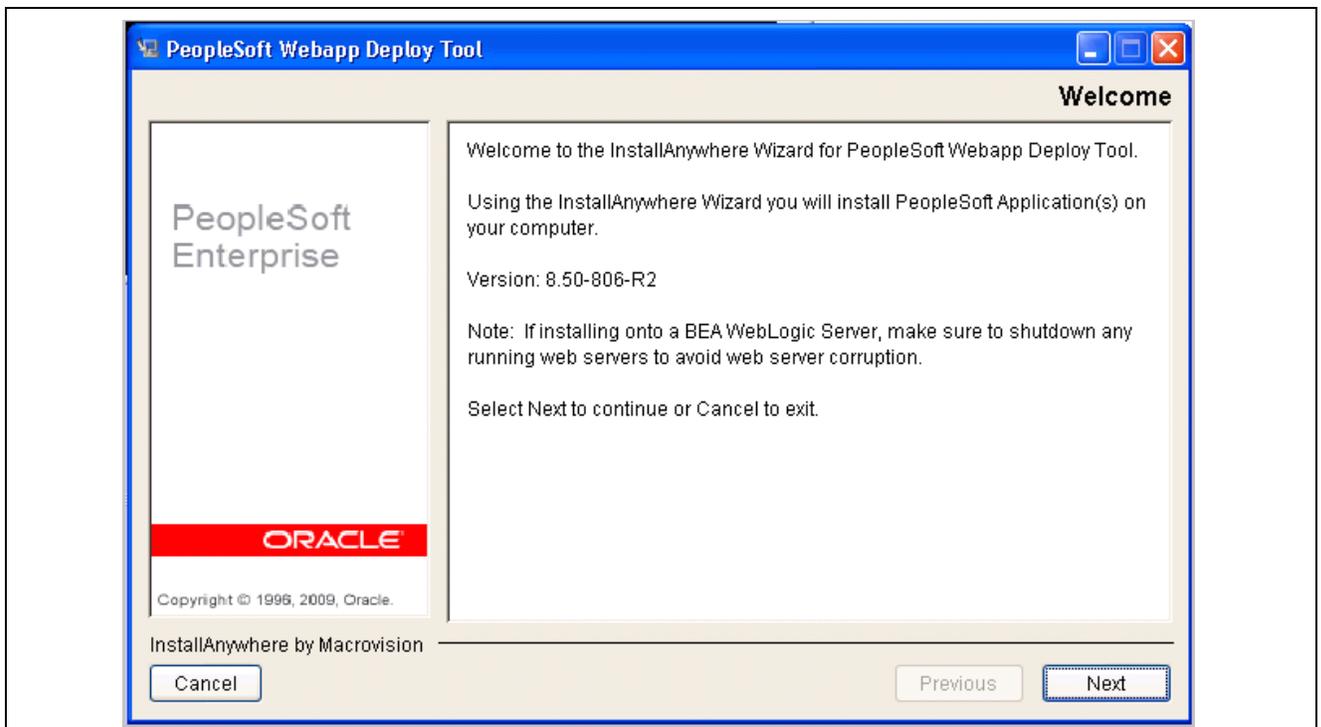
You cannot use an existing PeopleSoft Pure Internet Architecture domain on an Oracle WebLogic Server for the Dialog Execution Server (DES). A new Oracle WebLogic domain creates during the DES installation. Additionally, you cannot use the same PeopleSoft Pure Internet Architecture HTTP/HTTPS port number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

### Task 3-7-1: Installing DES on Oracle WebLogic for MS Windows

To install the DES application on an Oracle WebLogic Server running on Microsoft Windows:

1. Go to *PS\_HOME*\setup\PsmPWebAppDeployInstall and run setup.bat.

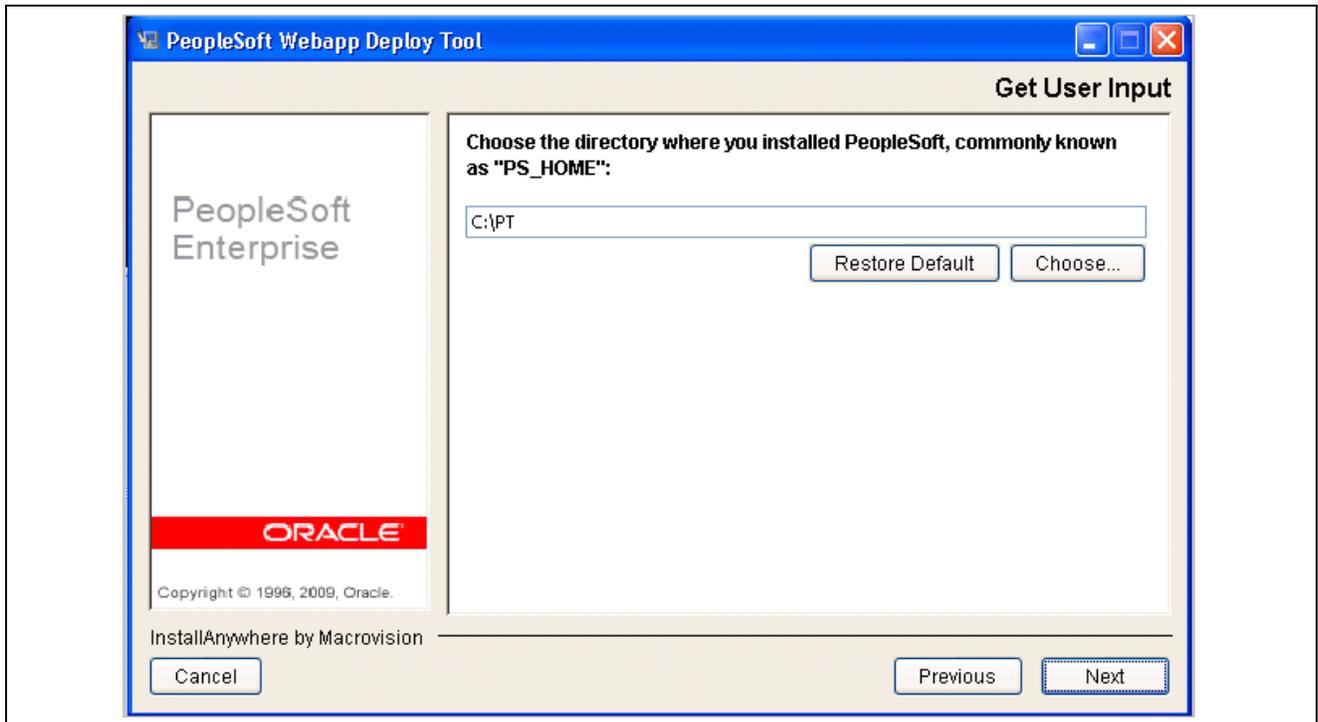
The PeopleSoft Welcome page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Welcome page

2. On the Welcome page, click Next.

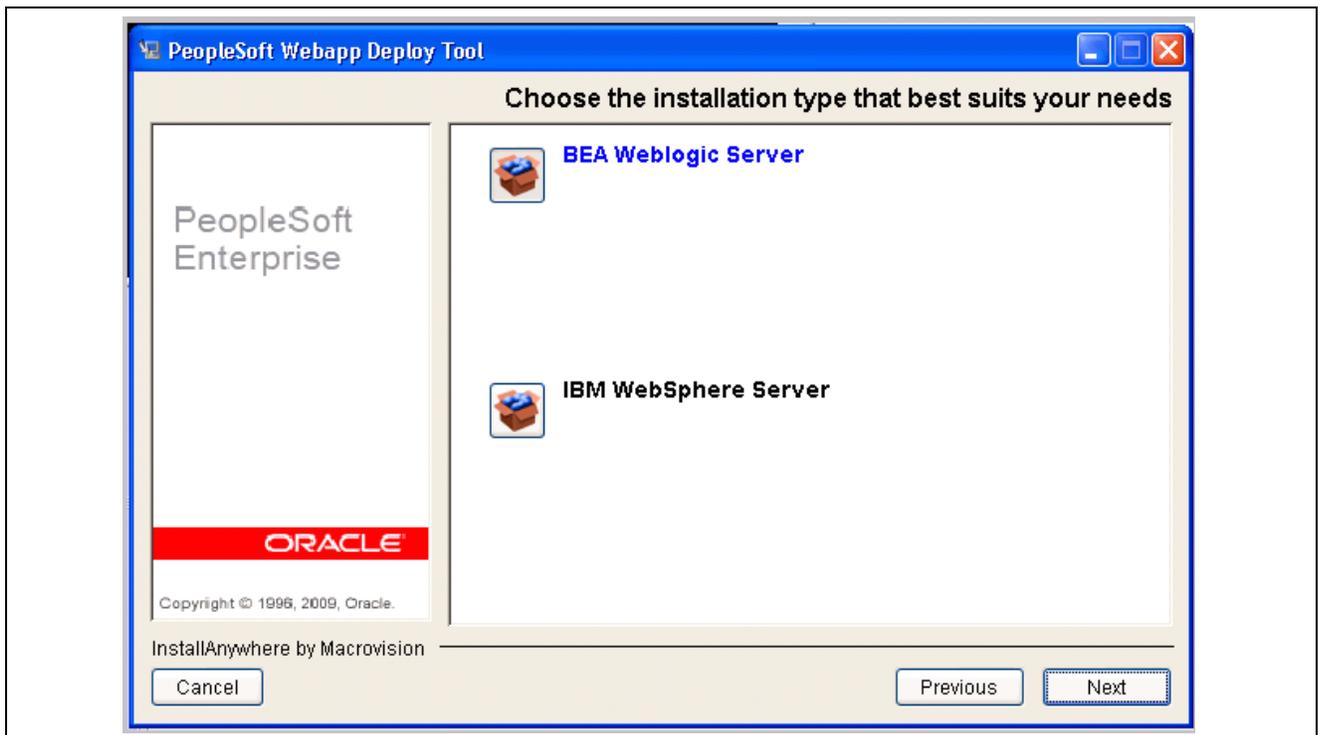
The PeopleSoft PeopleTools home directory selection page appears, as shown in the following example:



PeopleSoft PeopleTools home directory selection page

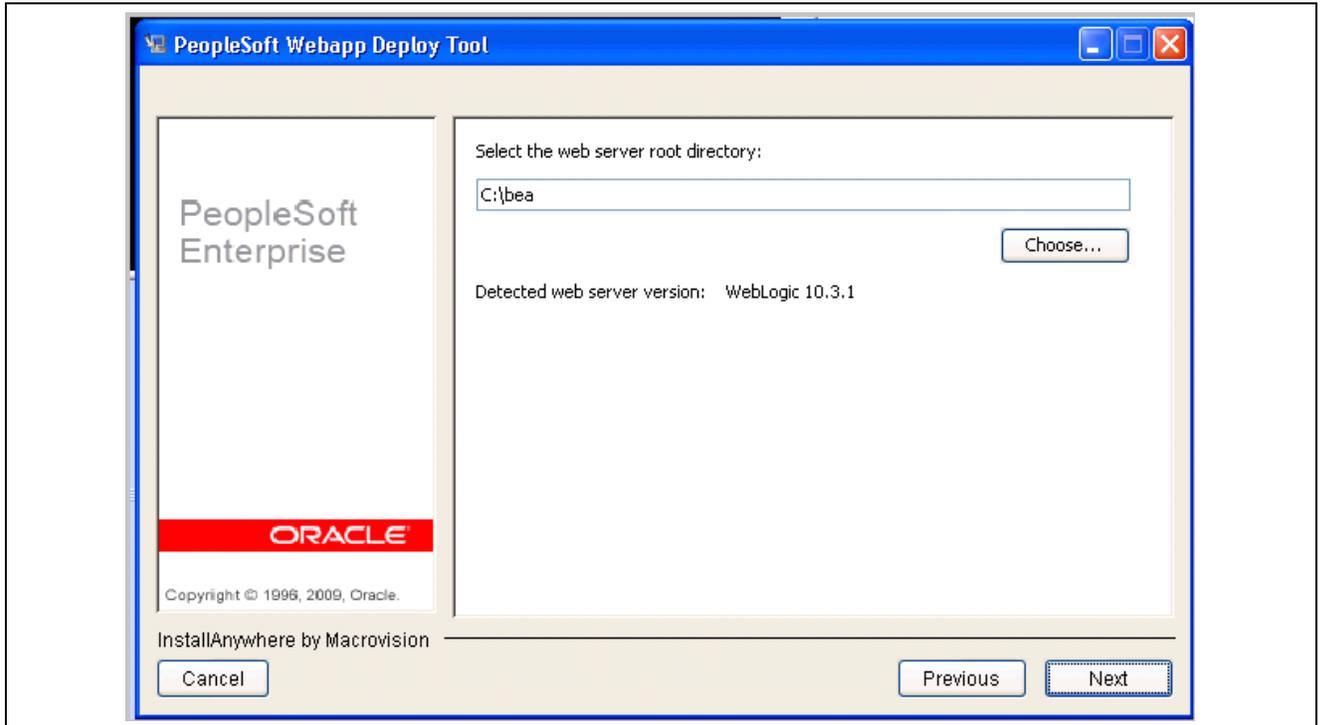
3. On the PeopleSoft PeopleTools home directory selection page, enter the *PS\_HOME* directory (where you installed your PeopleSoft PeopleTools application) and click Next.

The Web server selection page appears, as shown in the following example:



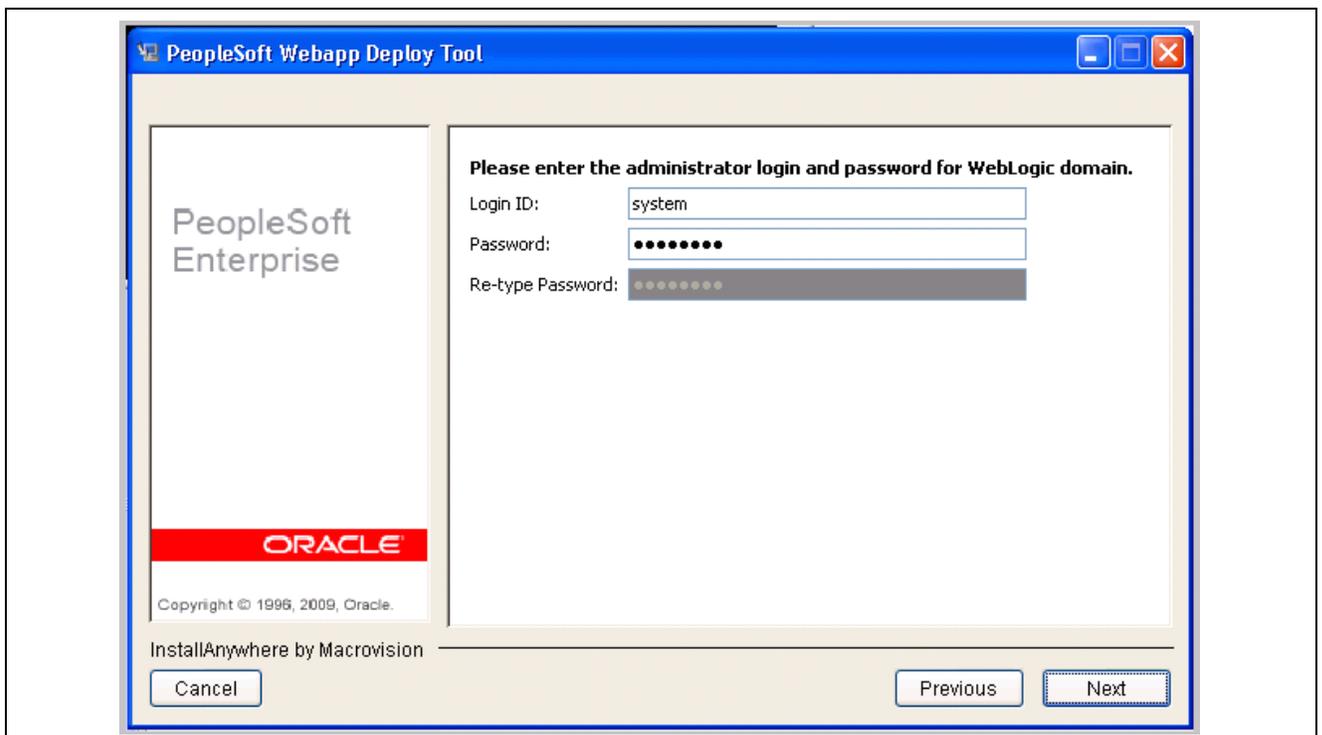
PeopleSoft Webapp Deploy: Web server selection page

- 4. On the web server selection page, select the BEA WebLogic Server option and click Next.
- 5. Enter the WebLogic Server root directory (for example, *c:\bea*), as shown in the following example:



PeopleSoft Webapp Deploy: Server Root Directory page

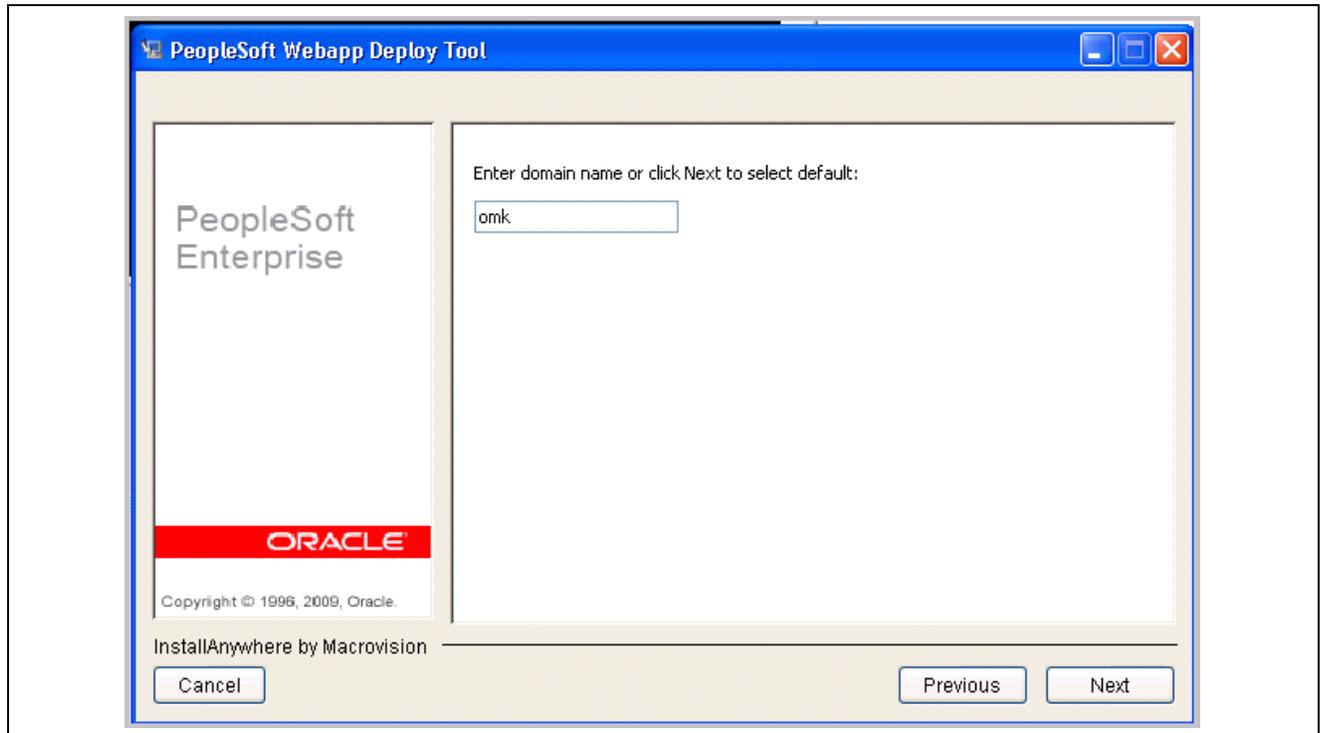
- 6. Click Next. The Oracle WebLogic login information page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Oracle WebLogic Login Information page

7. On the Oracle WebLogic login information page, enter the login ID and enter *Passw0rd* in the Password field for the Oracle WebLogic domain. Click Next.

The Application name selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Oracle Domain page

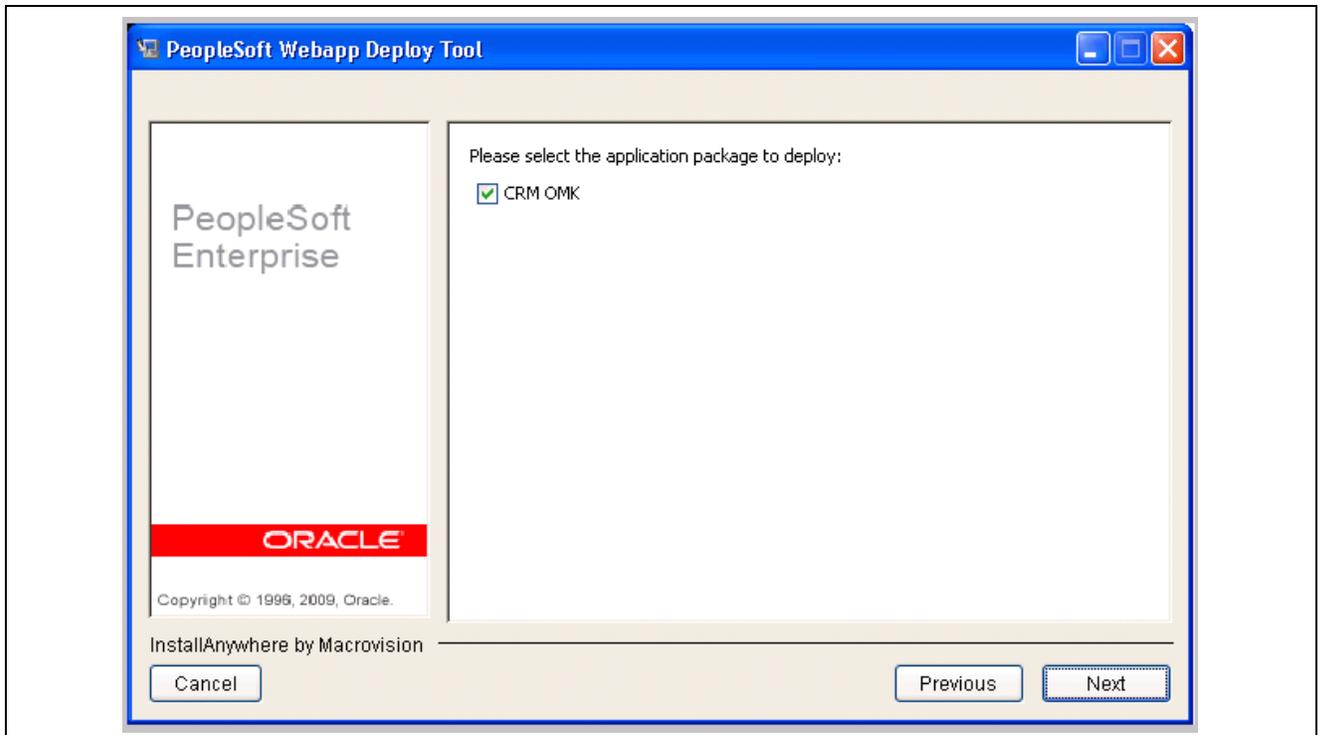
8. On the Application name selection page, enter your new domain name (for example, *omk*) and click Next.

---

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

---

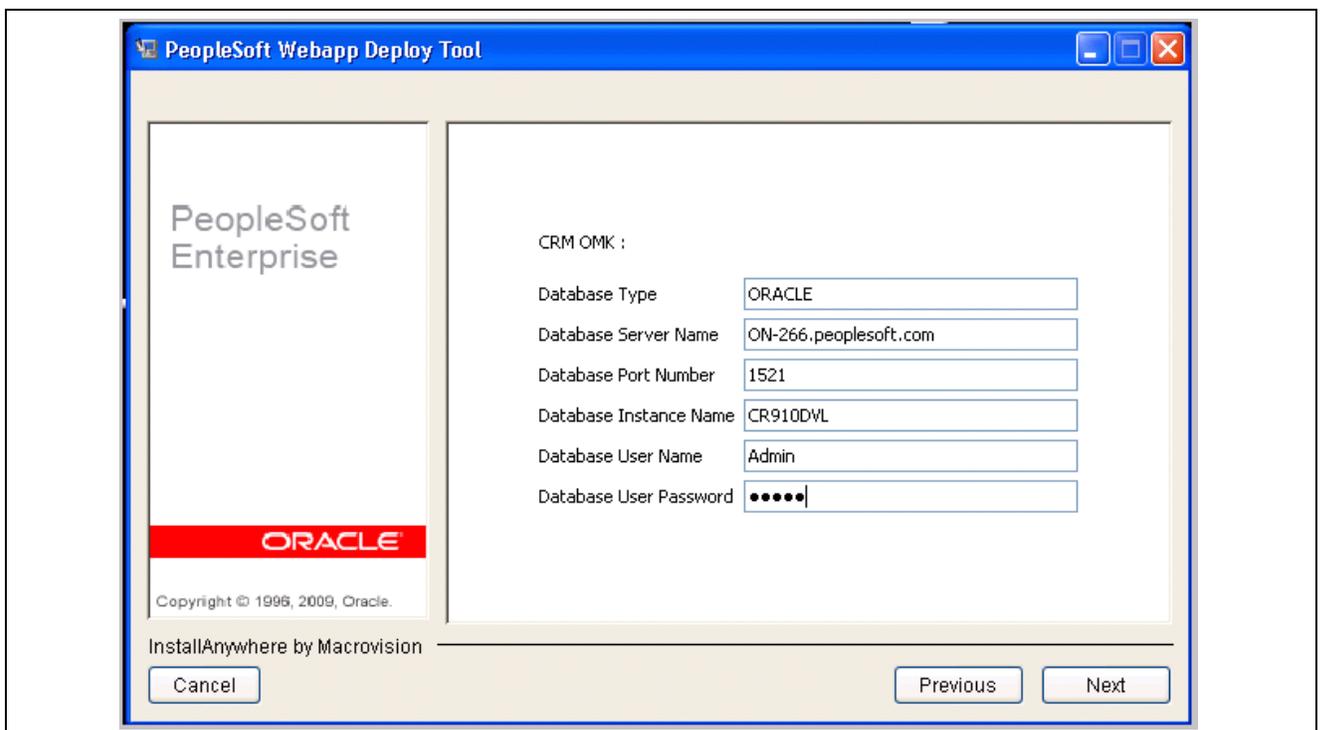
The Application package selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Application Package Selection page

9. On the Application package selection page, select *CRM OMK* as the application package to deploy and click Next.

The PeopleSoft CRM database information page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Database Information page

10. Complete the PeopleSoft CRM database information page using the following instructions:

- 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.

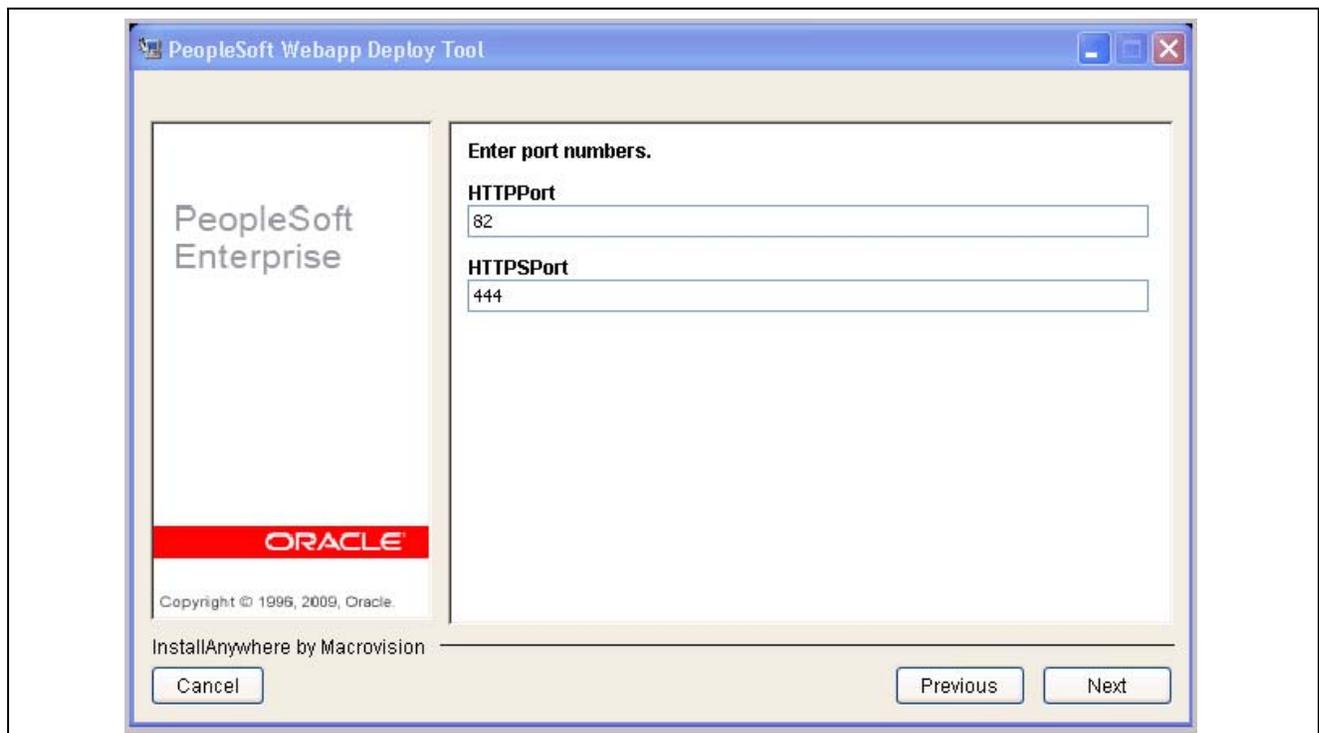
---

**Note.** For MSSQL2008 *Only*. On the server where the database is running, check the port by opening SQL Server Configuration Manager, Protocols for SQL2008, and select the Properties of TCP/IP. In the tab IP addresses, set the TCP Port in section IPAll to *1433* (replace with actual port number on your site, if 1433 is the not the default SQL2008 port selected). Consult your database administrator to determine the correct value for your configuration and for further information.

---

- 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.

11. Click Next. The DES HTTP/HTTPS port selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Port Numbers page

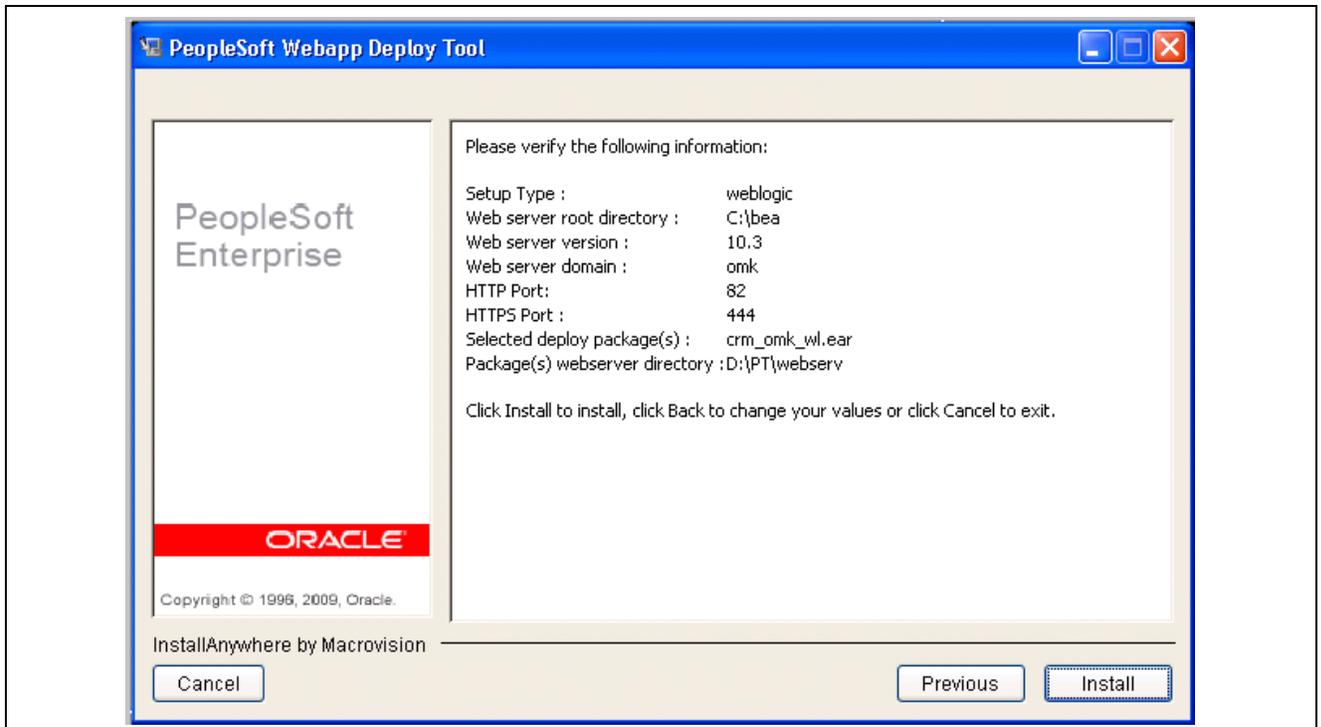
12. On the DES HTTP/HTTPS port selection page, enter the DES HTTP and HTTPS port numbers.

---

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

---

13. Click Next. The installation Summary page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Summary page

14. Verify that the information is correct.

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

15. Click Install 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\websevr\omk\DES\DES0.stderr.log`).

---

16. Click Finish to exit the installation.

## Task 3-7-2: Installing the DES on Oracle WebLogic on UNIX

To install the DES application on an Oracle WebLogic server running on UNIX:

1. Shut down any Oracle WebLogic web server that is running.
2. Go to `PS_HOME/setup/PsMpWebAppDeployInstall` and run the appropriate setup command with these additional parameters:
  - `setup.sh -is:javaconsole -console`
  - `setup.sh.solaris -is:javaconsole -console`
3. 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: 8.50
```

---

**Note.** If you are installing on an Oracle 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/crm910db] e.g. /ds2
/home/upgtest2/crm910db
```

5. Enter *I* to continue.
6. Enter *I* to select the IBM WebSphere Server:

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

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

For example:

```
/ds2/home/upgtest2/WLS1031
Detected web server version: Weblogic 10.3.1
```

10. Enter *I* to continue.
11. Enter *I* to continue.
12. Specify the login ID and password, or press ENTER to accept the default:

```
Login ID: [system]
Password: [Passw0rd]
]
Re-type password: [Passw0rd]
]
```

13. Enter *I* to select CRM OMK for the application package to deploy:

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

14. Enter the domain name or enter *0* to select the default [PSWebApp].
15. Enter *I* to continue.
16. 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
```

17. Enter *I* to continue.
18. 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]
```

19. Enter *I* to continue.
20. 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
```

21. Enter *I* to deploy.

### Task 3-7-3: Modifying the setEnv.sh

To modify the setEnv.sh after the installation completes:

1. Go to *PS\_HOME/webserv/omk\_domain/bin - vi setEnv.sh*.
2. Append `:${PS_HOME}/webserv/${DOMAIN_NAME}/lib/xalan.jar` to `PSCLASSPATH=`

It will become:

```
PSCLASSPATH=${PS_HOME}/webserv/${DOMAIN_NAME}/lib/ptib.jar:${PS_HOME}/webserv/${DOMAIN_NAME}/lib/psjoa.jar:${PS_HOME}/webserv/${DOMAIN_NAME}/lib/xalan.jar
```

### Task 3-7-4: Starting the DES on an Oracle WebLogic Server

1. Before you start the DES, do the following to rename the toplink file that is provided by Oracle WebLogic 10.3.1:
  - a. On Microsoft Windows, rename *BEA\_HOME\modules\com.oracle.toplink\_1.0.0.0\_11-1-1-1-0.jar* as follows:

```
BEA_HOME\modules\com.oracle.toplink_1.0.0.0_11-1-1-1-0.jar.XXX
```

b. On UNIX:

```
> cd BEA_HOME/modules > mv com.oracle.toplink_1.0.0.0_11-1-1-1-0.jar⇒  
com.oracle.toplink_1.0.0.0_11-1-1-1-0.jar.XXX
```

2. Start the DES application as follows:

a. On Microsoft Windows, start the DES application on an Oracle WebLogic Server by entering the following in the Command Window:

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

b. On UNIX, start the DES application on an Oracle WebLogic Server by entering the following in the Command Window:

```
> cd PS_HOME/websevr/<domain name>/bin> startPSWEBAPPS.sh
```

---

## 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 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 DES HTTP/HTTPS port number. You must create a new IBM WebSphere web server and start this server before you install the DES. This should be done through the IBM WebSphere Administration Console.

---

**Important!** Before you install the DES application on an IBM WebSphere server, you must review the task *Modifying the DES 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.** As necessary, 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 appears here.

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

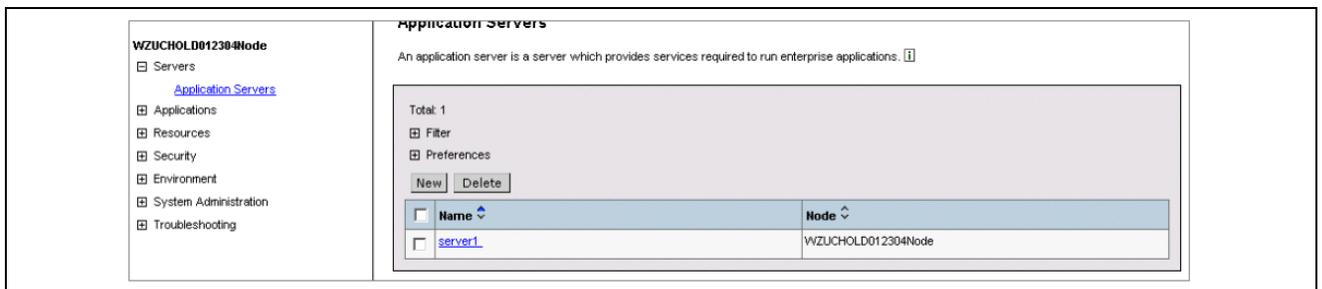
You can access the administration console through the Admin Console port that is specified as a modified port, or through the silent install ports 19090 or 19091.

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

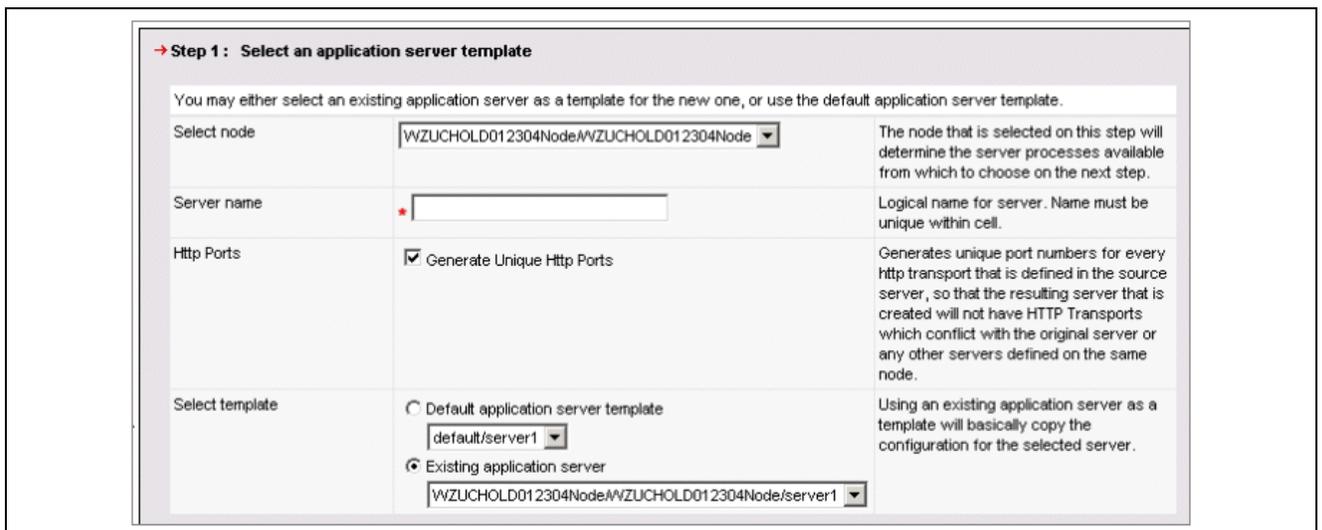
4. Select Application Servers and click New, as shown in the following example:



Application Servers page

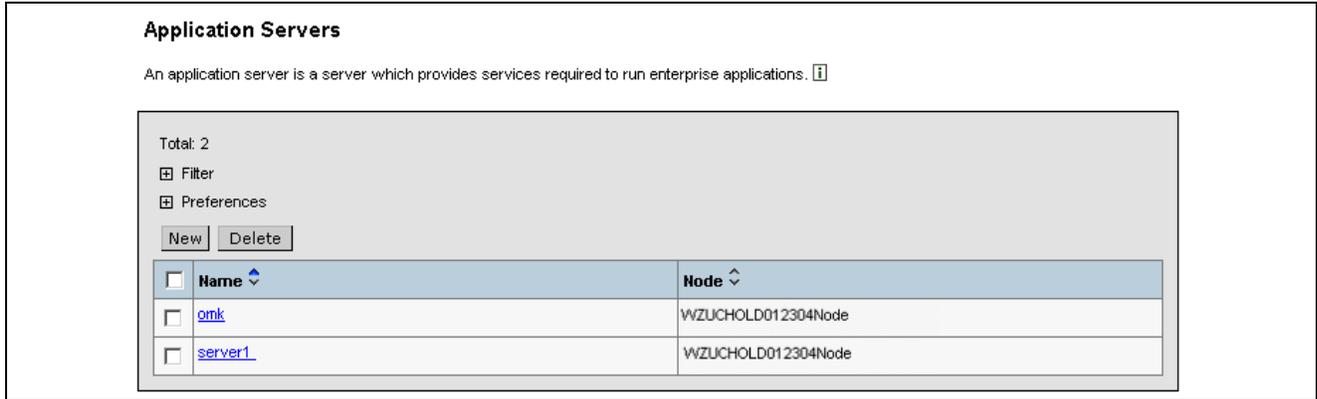
5. Define a new server name (for example, *omk*).
6. Select an existing application server for the template.

Use server1, created earlier, as the default, as shown in the following example:



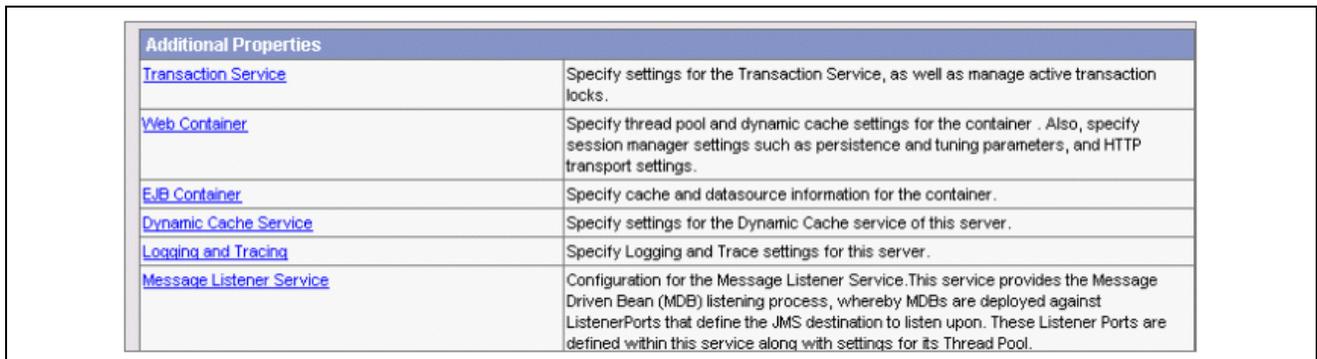
Application Server Template

7. Click Next.
8. Click Finish.
9. Click Save.
10. Expand the Servers section and click Application Servers to validate that the second server was created, as shown in the following example:



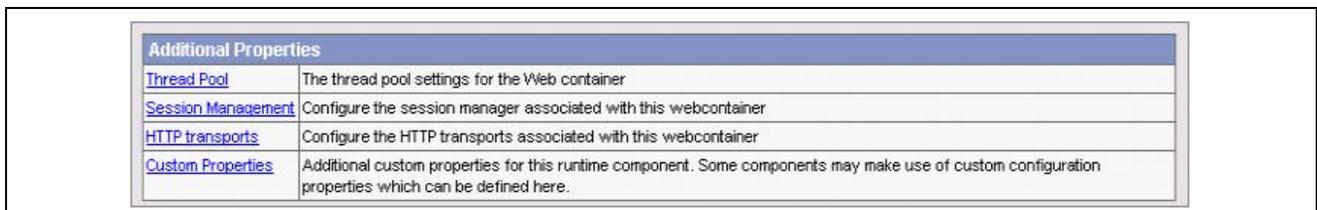
Application Servers page

11. Select the New Server and Web Container links to verify the ports that were assigned to the new server, as shown in the following example:



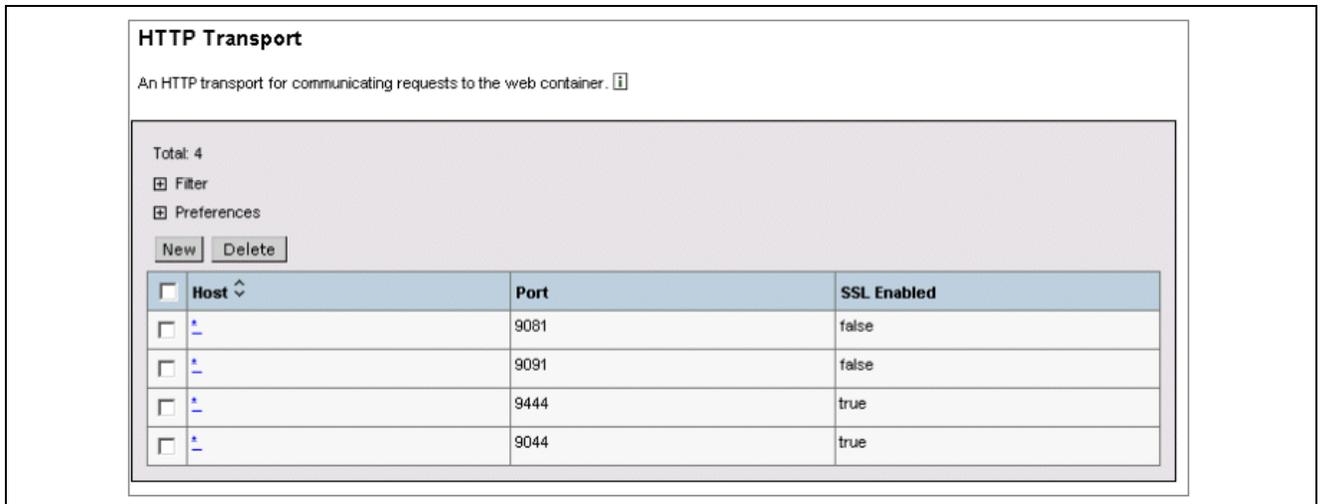
Additional Properties page: Web Container link

12. Select the HTTP transports link, as shown in the following example:



Additional Properties page: HTTP transports link

The HTTP Transport page appears, as shown in the following example:



HTTP Transport page

13. Start the new server by entering the following 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 %WAS\_HOME%\bin, where *WAS\_HOME* is the IBM WebSphere installation directory.
2. Enter this command, as shown in the example that follows:

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



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, if it is not already started, for installation of the DES.

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

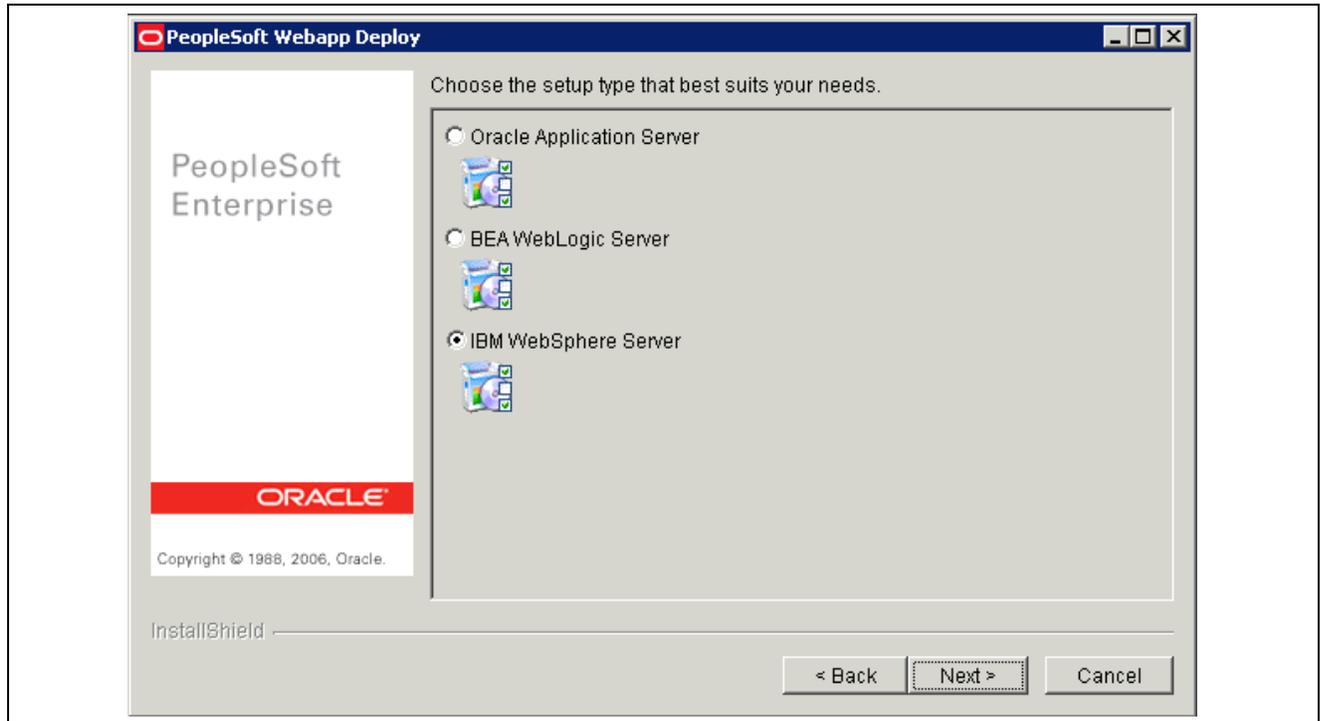
To install the DES application on an IBM WebSphere server running on Microsoft Windows:

---

**Note.** A similar page appears in the task “Installing the DES Application on an Oracle WebLogic Server on MS Windows.”

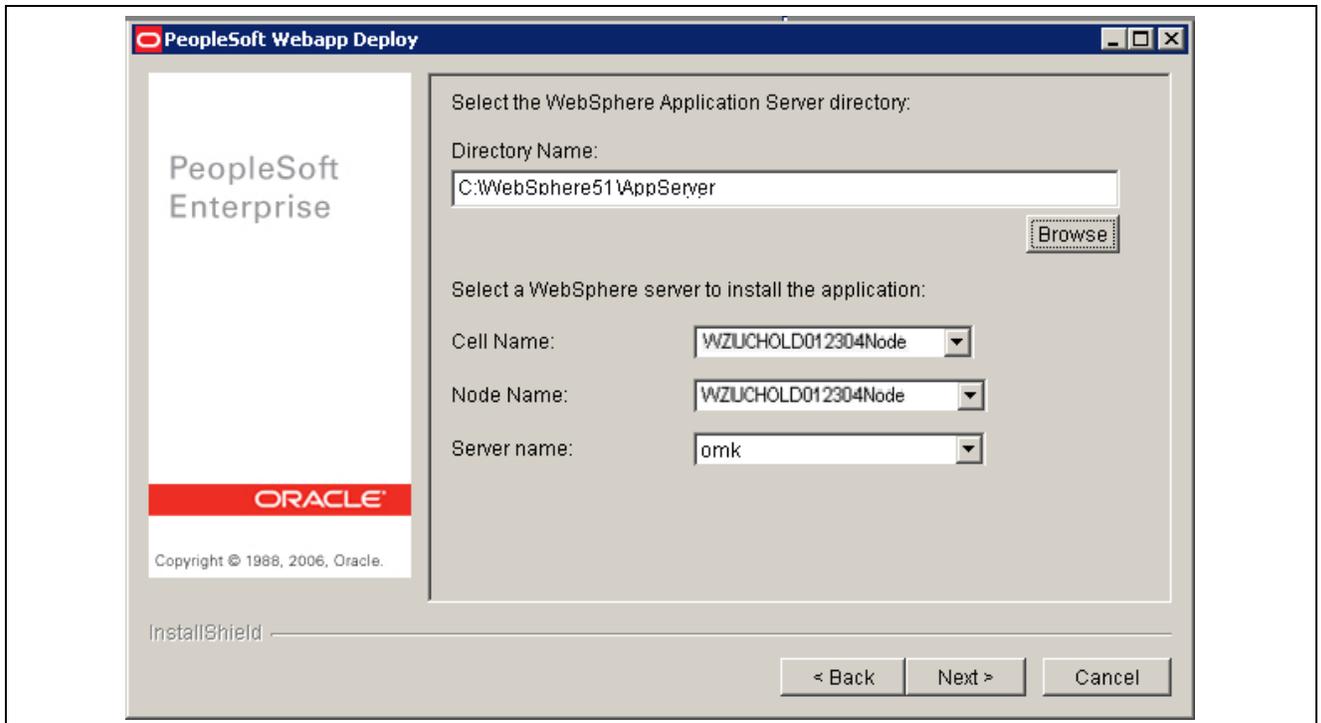
---

1. Go to *PS\_HOME*\setup\PsmPWebAppDeployInstall and run setup.bat.
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, as shown in the following example:



PeopleSoft Webapp Deploy: Web server selection page

The IBM WebSphere application server specifications page appears, as shown in the following example:



PeopleSoft Webapp Deploy: IBM WebSphere application server specifications page

5. Complete the IBM WebSphere application server specifications page as follows:
  - 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 selection page, enter the application name and click Next.
7. On the application package selection page, select the CRM OMK check box option 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.

---

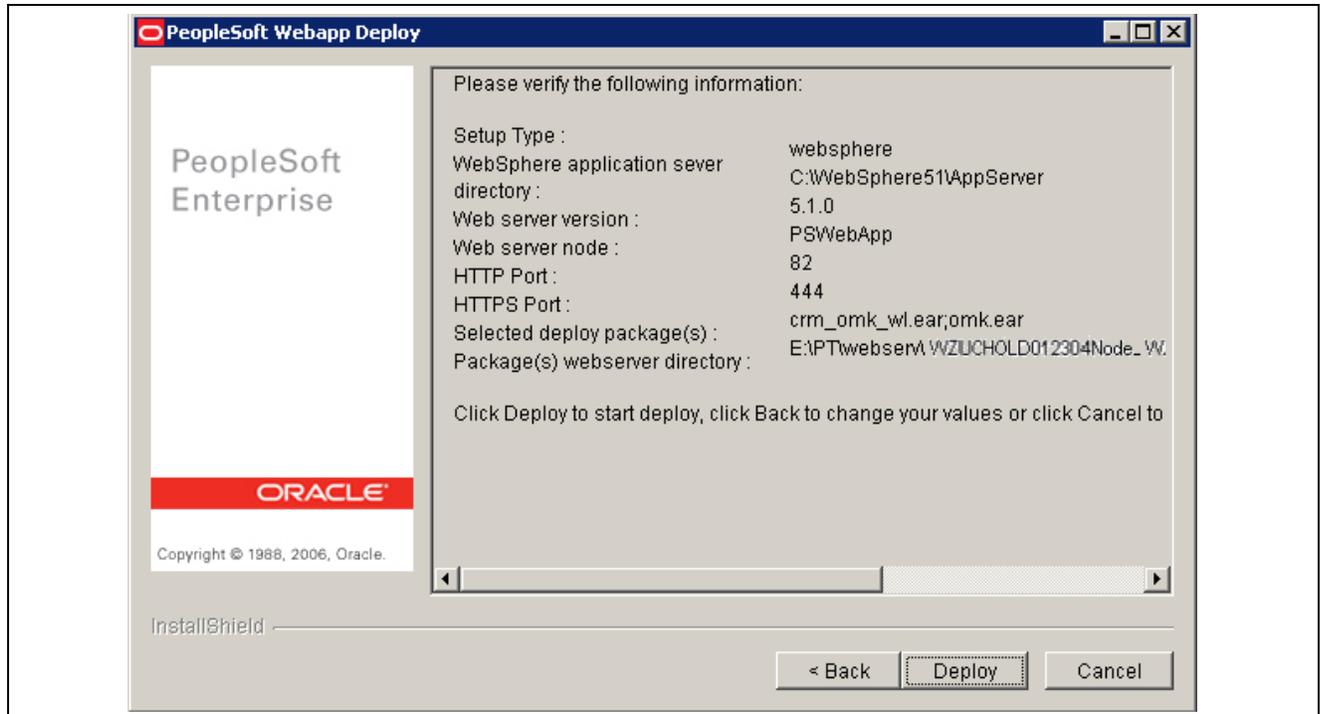
**Note.** For *MSSQL2008 Only*. On the server where the database is running, check the port by opening SQL Server Configuration Manager, Protocols for SQL2008, and select the Properties of TCP/IP. In the tab IP addresses, set the TCP Port in section IPAll to *1433* (replace with actual port number on your site, if 1433 is not the default SQL2008 port selected). Consult your database administrator to determine the correct value for your configuration and for further information.

---

- 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 selection page, enter the DES HTTP and HTTPS port numbers and click Next.

The installation Summary page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Summary page

10. Verify that the information is correct.

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

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 *setup.sh* script.
2. After the following messages appear, enter *I* 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 install PeopleSoft Webapp deploy Tool
Version: 8.50
```

---

**Note.** If you are installing onto an Oracle WebLogic Server, ensure that you shut down any running web servers to avoid web server corruption.

---

3. Click *1* for Next, *3* to Cancel, or *5* to Redisplay [*1*].
4. Select the directory where you installed PeopleSoft, commonly known as *PS\_HOME* (*/ds1/home/crm910db* in this example), as follows:

```
Specify a directory name or press Enter [/ds1/home/crm910db]
```

5. Enter *1* to continue.
6. Enter *2* to select the IBM WebSphere server:

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

7. Enter *0* to finish.
8. Enter *1* to continue.
9. Specify the location of the IBM WebSphere Application Server directory.

For example:

```
[/opt/WebSphere61/AppServer] /products/WebSphere70/AppServer
```

10. Enter *1* to continue.
11. Select the application name or accept the default.

For example:

```
[PSWebApp] OMK
```

12. Enter *1* to continue.
13. Enter *1* to select CRM OMK for the application package to deploy:

```
-> 1 - CRM OMK
```

14. Enter *0* to finish.
15. Enter *1* to continue.
16. 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: [] crm910db
Database User Name: [Admin] crm910db
Database User Password: [] crm910db
```

17. Enter *1* to continue.

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

For example:

```
HTTP Port: [80] 19850
HTTPS Port: [443] 4433
```

---

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

---

19. Enter */* to continue.  
 20. Review and confirm your selections before deploying the DES server.

For example:

```
Setup Type: websphere
WebSphere application sever directory :
Web server version: 7.0.0.0
Web server node : OMK
HTTP Port: 19850
HTTPS Port: 4433
Selected deploy package(s): crm_omk_wl.ear
Package(s) webserver directory: /ds1/home/crm910db/webserv
```

21. Enter */* to deploy.

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

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

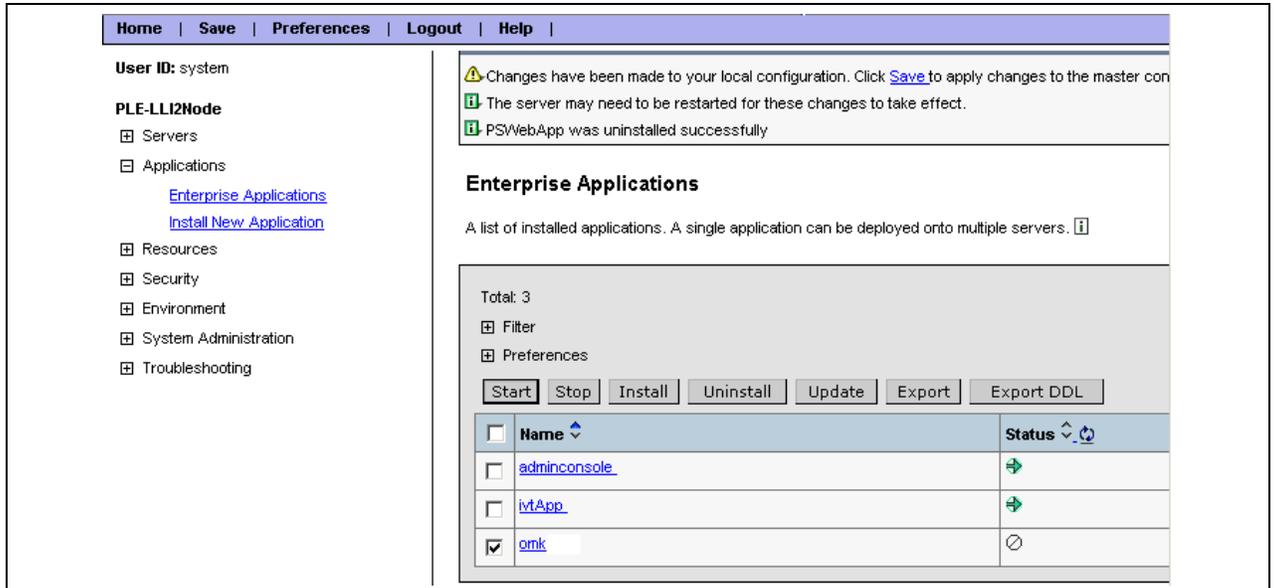
- For IBM WebSphere on Microsoft Windows, enter the following in the Command Window:

```
%WAS_HOME%\bin\startServer.bat <server name>
```

- For IBM WebSphere on UNIX, enter the following:

```
<WAS_HOME>/bin/startServer.sh <server name>
```

- 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*), as shown in the following example:



IBM WebSphere Administration Console: Enterprise Applications page

c. Click the Start button to start the DES.

## Task 3-9: 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 3-9-1: Downloading JDBC Drivers

Because PeopleSoft Online Marketing is a Java based application, you must obtain the relevant JDBC drivers from the install media of the database that you are using.

The following table lists the database and required files to assist you in identifying which files to copy from the install media:

Database	Required Files
Oracle 10g	ojdbc14.jar
Oracle 11g	ojdbc6.jar
IBM DB2 LUW	db2jcc.jar db2jcc_license_cu.jar db2jcc_license_cisuz.jar
Microsoft SQL server	sqljdbc4.jar

## Task 3-9-2: Installing JDBC Driver on the PeopleSoft Server

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 3-9-3: Installing the JDBC Driver on the DES

To install the JDBC driver on the DES:

Copy the jar files to the appropriate location, as shown in the following table:

DES Installed on	UNIX	Microsoft Windows
Oracle WebLogic	<code>&lt;PS_HOME&gt;/webserv /&lt;DOMAIN_NAME&gt;/applications /crm/</code>	<code>&lt;PS_HOME&gt;\webserv \&lt;DOMAIN_NAME&gt;\applications \crm\</code>
IBM WebSphere	<code>&lt;WebSphereInstallRoot&gt;/lib</code>	<code>&lt;WebSphereInstallRoot&gt;\lib</code>

---

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

---

## Task 3-10: Cybersource Credit Card Integration Configuration

In this task, you will perform Credit Card Integration Configuration prior to starting the DES. After you install the DES, you must perform the following manual configuration steps.

---

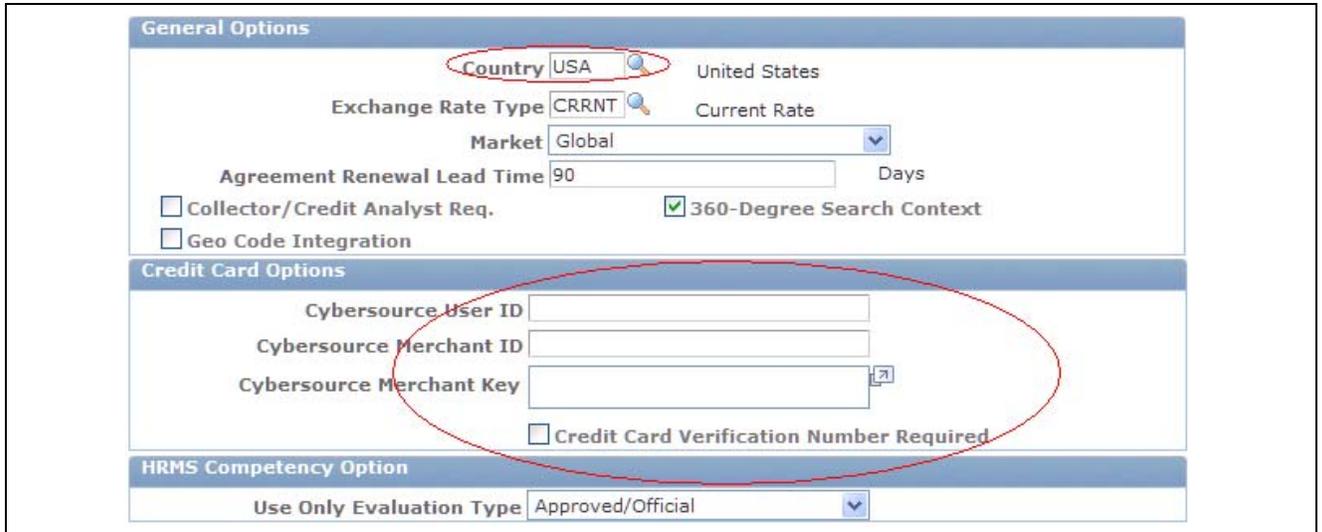
**Note.** You must perform the Customer Relationship Management (CRM) Credit Card setup before performing this task.

Refer to the task *Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture* in Chapter 1 of this installation document.

---

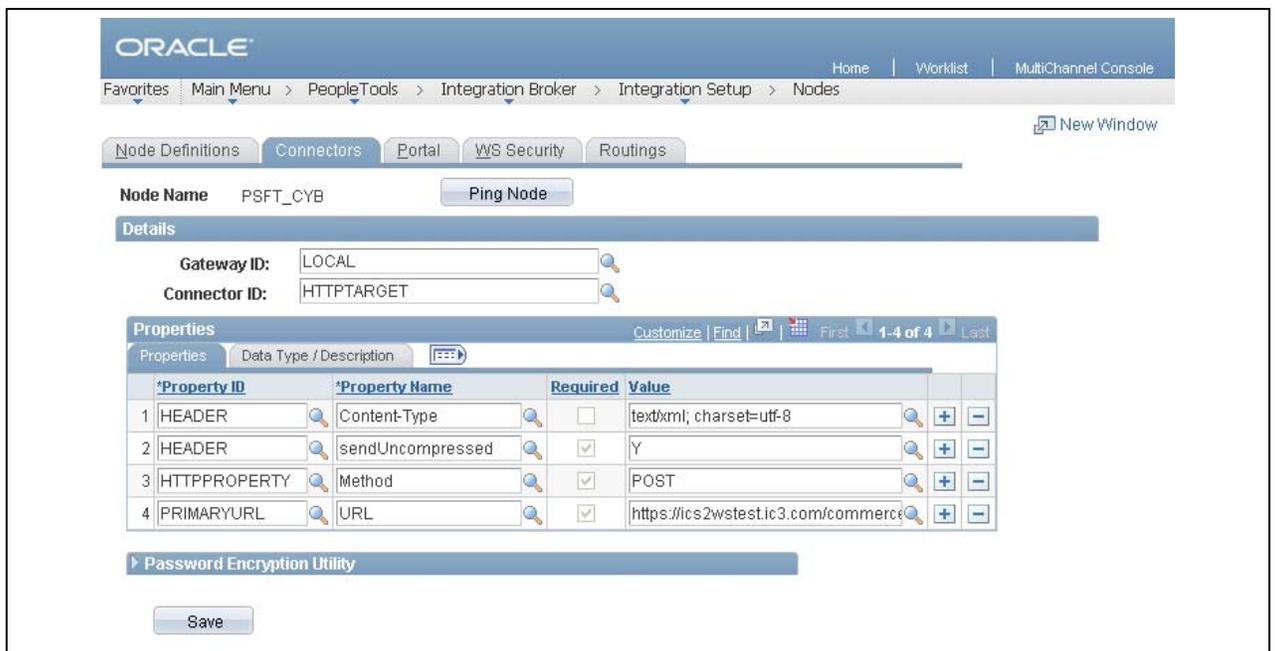
To perform CyberSource Credit Card Integration Configuration:

1. Configure the Merchant information in the CRM installation page, as shown in the following example:



General Options: Merchant Information page

- a. Select Set Up CRM, Install, Installation Options.
  - b. Enter the CyberSource User ID, CyberSourceMerchant ID, and CyberSourceMerchant key. These are required.
2. Configure the PeopleSoft Integration Broker:
- a. Select PeopleTools, Integration Broker, Integration Setup, Nodes and open the node PSFT\_CYB.
  - b. Click the Connectors tab to access the connectors page and configure the parameters as shown in the following example:



PSFT\_CYB Node - Connectors page

- c. If the current system is a production system, the URL is:

`https://ics2ws.ic3.com/commerce/1.x/transactionProcessor`

Otherwise, please use the test environment.

`https://ics2wstest.ic3.com/commerce/1.x/transactionProcessor`

3. Configure the Cybersource Java Simple Order Client in DES:
  - a. If the DES server is installed behind a firewall, configure the proxy server in the `setEnv.cmd` file or the `setEnv.sh` file.

The following table lists the locations where the `setEnv.cmd` or `setEnv.sh` files can be found:

DES Installed On	UNIX	MICROSOFT WINDOWS
Oracle WebLogic	<code>&lt;PS_HOME&gt;/webserv/&lt;DOMAIN_NAME&gt;bin</code>	<code>&lt;PS_HOME&gt;\webserv\&lt;DOMAIN_NAME&gt;bin</code>
IBM WebSphere	<code>&lt;PS_HOME&gt;/webserv/&lt;DOMAIN_NAME&gt;/installedApps/&lt;DOMAIN_NAME&gt;nodecell/&lt;DOMAIN_NAME&gt;.ear</code>	<code>&lt;PS_HOME&gt;\webserv\&lt;DOMAIN_NAME&gt;\installedApps\&lt;DOMAIN_NAME&gt;nodecell\&lt;DOMAIN_NAME&gt;.ear</code>

**Note.** Replace `<DOMAIN_NAME>` with your DES domain name. For example: `PSWebApp` or `OMK`

Set the variable as shown here for Microsoft Windows:

```
SET ENABLE_HTTP_PROXY=true
SET HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>
SET HTTP_PROXY_HTTPPORT=<PROXY_PORT>
SET HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>
SET HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

Set the variable as shown here for UNIX:

```
export ENABLE_HTTP_PROXY=true
export HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>
export HTTP_PROXY_HTTPPORT=<PROXY_PORT>
export HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>
export HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

- b. Cybersource should provide you with a sample SSL certificate file, for example, `entrust_ssl_ca.cer`. You must copy this file locally and register it as instructed in the next step.
- c. Install the generic ssl security certificate to the DES webserver keystore directory. Go to directory:

For Oracle WebLogic: `<PS_HOME>\webserv\<DOMAIN_NAME>\keystore`

For IBM WebSphere: `<PS_HOME> \webserv\<DOMAIN_NAME>\installedApps\<DOMAIN_NAME>nodecell\crm.ear\keystore`

Run the command:

```
<PS_HOME>\jre\bin\keytool -importkeystore -destkeystore pskey -importcert ->
alias entrust_ssl_ca -file <PS_HOME>\jre\bin\webserv\<DOMAIN_NAME>\keystore=>
\entrust_ssl_ca.cer -keypass password -keystore pskey -storepass password
```

```
Trust this certificate? [no]: yes
```

- d. Restart the DES.

---

## 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, perform the following steps:

1. 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.”
2. 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.”
3. 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.”
4. 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 IBM WebSphere, the log files reside in these directories:  
`<PS_HOME>\webserv\ <domain name>\DES\DES0.stderr.log`  
`<PS_HOME>\webserv\ <domain name>\DES\log\DES1_Debug.log`
  - For Oracle WebLogic, the log files reside in these directories:  
`<PS_HOME>\webserv\ <domain name>\DES\DES0.stderr.log`  
`<PS_HOME>\webserv\ <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. Confirm that the message Scheduler Timer is running.
  7. Verify that the Integration Broker for PeopleSoft OLM is accessible:
    - a. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
    - 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 one of the additional component email servers that Oracle recommends. 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 as follows:

```
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, 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 (such as Mailcaster, ERP and Watchdog), you must make sure that the PeopleSoft Process Scheduler is started.

**Note.** All PeopleSoft OLM Standalone Dialog Server files will be installed to the `ps_root/JavaApps` directory. This directory must be writable and accessible by the PeopleSoft Process Scheduler. You must set the `ps_root` directory in the environment variable `PS_VAL_HOME`. If the environment variable `PS_VAL_HOME` cannot be found, the system will look for the environment variable `PS_CFG_HOME`. If both of these variables are not defined, the system will look for the directory in environment variable `PS_HOME`.

For the purpose of this task, `PS_HOME` is used. Depending on your system configuration, `PS_VAL_HOME` or `PS_CFG_HOME` can be used instead.

## 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, as shown in the following example:

*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	🗑️

Maintain Dialog Servers page

2. Click the Create a New Instance button.
3. From the Server Name list, select one of your Process Scheduler servers.
4. 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.

5. To complete the addition of the service that you selected in the previous step, go to one of the following procedures, as applicable:
  - Adding E-Mail Response Processor

- Adding Mail Service
- Adding Watch Dog

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

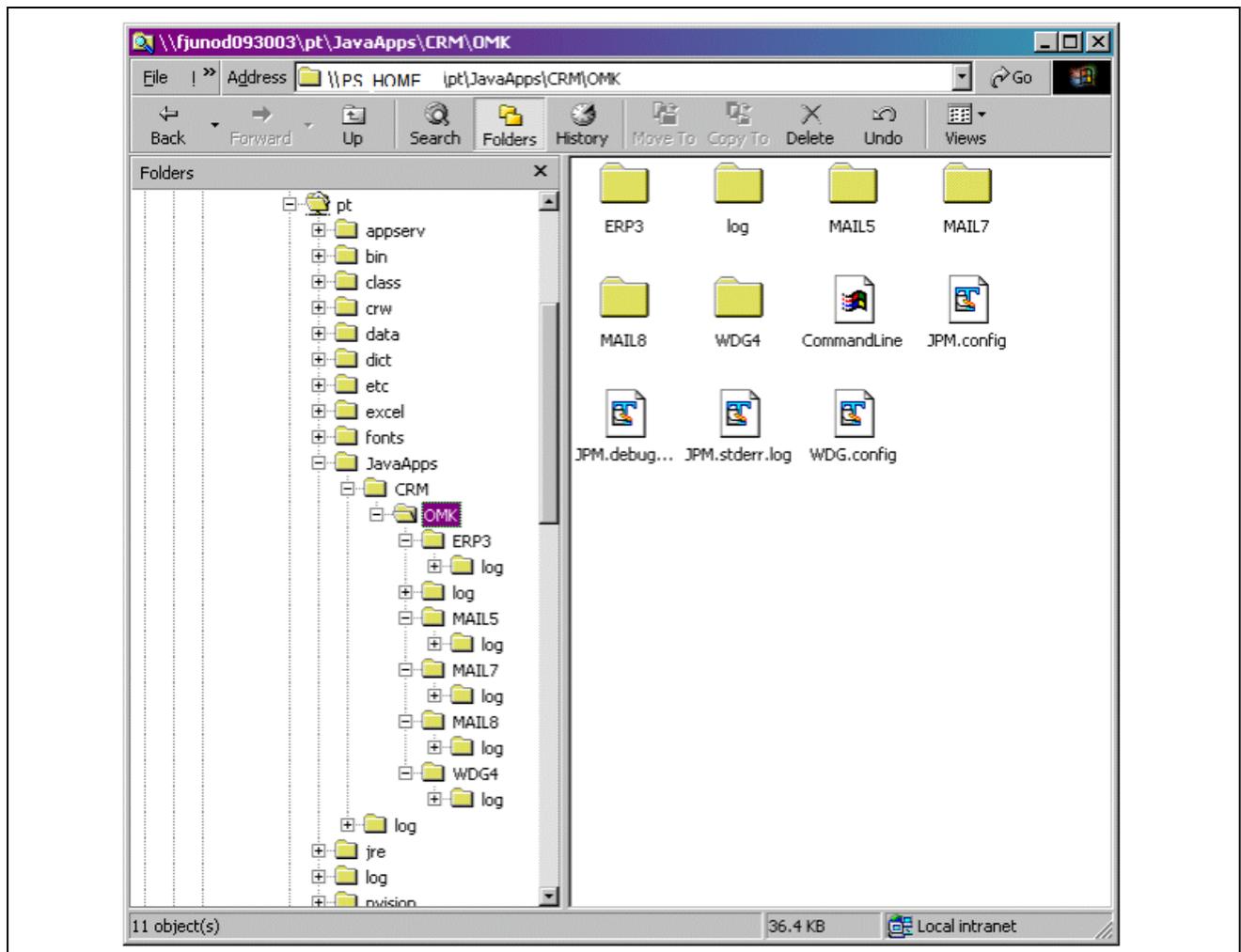
If your selection is *E-Mail Response Processor* (ERP) for the service type in step 4 of *Adding Standalone Dialog Servers*, you must complete the service installation by continuing with these steps.

To add the E-Mail Response Processor service:

1. 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.
2. 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 Process Scheduler installation that you selected, as shown in the following example:



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 all of the necessary information is *not* available at installation. Some fields prepopulate with information that was available at the time of the installation. See the ERP documentation for more details about how to configure 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 does 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 complete the service installation by completing 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 Process Scheduler installation that you selected.
3. Review the `MCR.config` file that is found in the created directory.  
It is not necessary to modify the `MCR.config` file, 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 installs 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 opens 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 your selection is *Watch Dog* for the service type in step 4 of *Adding Standalone Dialog Servers*, you must complete the service installation by completing these steps.

To add the Watch Dog service:

1. If your selection is the Watch Dog service, just click Save.  
Watch Dog has no service type options.
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 Process Scheduler installation that you selected.
3. Edit the WDG.config file.  
The Watch Dog configuration file is complicated; therefore, you should review the Watch Dog documentation before you attempt 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 these cases, the process stops. If the state changes to *Stop Request Failed*, further investigation is necessary.

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

---

## Task 3-14: Installing Adobe Graphic Dialog Flow Designer

This section discusses:

- Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic
- Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere

- Installing Adobe Graphic Dialog Flow Designer on Microsoft Windows

## Task 3-14-1: Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic

Graphic Dialog Flow Designer is an Adobe Flex application on the PeopleSoft Pure Internet Architecture server. This task details how to deploy the Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic.

1. Verify that files *DialogDesigner\_wl.ZIP* for Oracle WebLogic exist and are located at: `<PS_HOME>/setup/PsMpPIAInstall/archives/`
2. Run the PIA *install.sh* again at `<PS_HOME>/\setup\PsmPPIAInstall`. You will see the following:

```
$ ./setup.sh
Executing setup.linux
Preparing to install
Extracting the installation resources from the installer archive
Configuring the installer for this system's environment
Launching installer
Preparing CONSOLE Mode Installation.
```

3. You will see the following:

```
Welcome to the InstallShield Wizard for Peoplesoft Internet Architecture.
```

---

**Note.** If installing onto an Oracle WebLogic Server, make sure to shutdown any running web servers to avoid web server corruption.

---

4. Select 1 for Next.
5. Choose the directory where you installed PeopleSoft, commonly known as "PS\_HOME"
6. Please specify a directory name or press Enter, for example, `[/data1/home/adconfig/PT850]`
7. Select 1 for Next.
8. Choose the installation type that best suits your needs from the following. To select an item enter its number, or 0 when you are finished.
  - 1- Oracle WebLogic Server
  - 2- IBM WebSphere Server
9. After you select your web server, select 1 for Next
10. Select the web server root directory, for example, `[/opt/bea]: /data1/home/adconfig/bea`. A message similar to the following will appear:
 

```
Detected web server version : WebLogic 10.3.1
```
11. Press 1 for Next.
12. Enter the administrator login and password for your WebLogic domain.
13. Select 1 for Next
14. Select from the following, to select an item enter its number, or 0 when you are finished.
  - 1- Create New WebLogic Domain

- 2- Existing WebLogic Domain
15. Select 2 for Next.
  16. Enter 0 when you are finished.
  17. Select application name from list. To select an item, enter it's number.
    - 1- Install additional PeopleSoft site.
    - 2- Redeploy PeopleSoft Internet Architecture.
    - 3- Re-create WebLogic domain and redeploy PeopleSoft Internet Architecture.
    - 4- Deploy additional PeopleSoft application extensions.
  18. Enter 0 when you are finished.
  19. Press 1 for Next.
  20. Please specify a name for the PeopleSoft website.  
For example *ps*.
  21. Enter the post number and summaries.  
For example, AppServer name: *ui\_sun10*
  22. Press 1 for Next.
  23. Enter the Name of the Web Profile used to configure the webserver. The user ID and password will be used to retrieve the web profile from the database. (NOTE: Other available preset web profile names are TEST, PROD, and KIOSK.)
    - a. Web Profile Name [DEV]:
    - b. User ID [PTWEBSERVER]:
    - c. Password [PTWEBSERVER]:
    - d. Re-type Password [PTWEBSERVER]:
  24. Select 1 for Next.
  25. Select the Report Repository location. Specify the following directory name:  

```
[/data1/home/adconfig/Peoplesoft Internet Architecture/psreports]
```
  26. Select *1* for Next to display a summary of your selections.  
The summary of your selections displays for your review and confirmation and will look similar to the following example.

```

Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] :
-----
Setup Type : weblogic
Web server root directory : /dsl/home/upgtest2/WLS1031
Web server version : 10.3
Web server domain : peoplesoft
Internet Architecture app name : PORTAL
Integration Gateway app name : PSIGW
PeopleSoft Business Interlink app name : PSINTERLINKS
PeopleSoft Online Library Infrastructure : PSOL
Environment Management Hub : PSEMHUB
Hello Portlet app name : helloportletapp
Portlet Container app name : pspc
Testsuite app name : testsuite
Wsrptest app name : wsrptest
Site name : ps
Authentication Token Domain :
Application server name : ui-sun10
JSL port : 9000
Report repository directory : /dsl/home/upgtest2/PeopleSoft Internet
Architecture/psreports
PIA webserv directory : /data/oradata/CR91T204/webserv
Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] : █

```

Oracle WebLogic Summary window

27. Select *I* for Next.

28. You will receive the following message:

```

Installation Complete Congratulations!
Peoplesoft Internet Architecture has been successfully installed to:data1/home=>
/adconfig/PT850/webserv

```

29. Press Done to quit the installer.

30. Press ENTER to exit the Installer.

## Task 3-14-2: Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere

Graphic Dialog Flow Designer is an Adobe Flex application on the PeopleSoft Pure Internet Architecture server. This task details how to deploy the Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere.

1. Verify that files *DialogDesigner\_ws.ZIP* for IBM WebSphere exist and are located at:  
<PS\_HOME>/setup/PsMpPIAInstall/archives/
2. Run the PIA *install.sh* again at <PS\_HOME>\\setup\PsMpPIAInstall. You will see the following:

```

$ ./setup.sh
Executing setup.linux
Preparing to install
Extracting the installation resources from the installer archive
Configuring the installer for this system's environment
Launching installer

```

Preparing CONSOLE Mode Installation.

3. You will see the following:

```
Welcome to the InstallShield Wizard for Peoplesoft Internet Architecture.
```

4. Select 1 for Next.
5. Choose the directory where you installed PeopleSoft, commonly known as `<PS_HOME>`.
6. Specify a directory name, or press Enter. For example: `[/data1/home/adconfig/PT850]`
7. Select `1` for Next.
8. Choose the installation type that best suits your needs from the following. To select an item enter its number, or `0` when you are finished.
  - 1- Oracle WebLogic Server
  - 2- IBM WebSphere Server
9. After you select your webserver, select `1` for Next.
10. Select the Websphere Application Server directory. For example:

```
[/opt/WebSphere61/AppServer]: /data1/home/IBM/WebSphere/Appserver
```

11. Select `1` for Next.
12. Select from the following. To select an item, enter its number, or `0` when you are finished.
  - 1- Create New WebSphere Application
  - 2- Existing Websphere Application
13. Select `2` for Next.
14. Enter `0` when you are finished.
15. Select the application name from the list. To select an item, enter its number:
  - 1- Install an additional PeopleSoft site.
  - 2- Redeploy PeopleSoft Internet Architecture.
  - 3- Deploy additional PeopleSoft application extensions.
16. Enter `0` when you are finished.
17. Press `1` for Next.
18. Please specify a name for the PeopleSoft website.
 

For example: `ps`
19. Enter the post number and summaries.
 

For example, AppServer name: `ui_sun10`
20. Press `1` for Next.
21. Enter the Name of the Web Profile that you used to configure the webserver.
 

The user ID and password will be used to retrieve the web profile from the database.

---

**Note.** Other available preset web profile names are: `TEST`, `PROD`, and `KIOSK`.

---

- a. Web Profile Name [DEV]:

- b. User ID [PTWEBSERVER]:
  - c. Password [PTWEBSERVER]:
  - d. Re-type Password [PTWEBSERVER]:
22. Select *I* for Next.
23. Select the Report Repository location. Specify the following directory name:

```
[/data1/home/adconfig/Peoplesoft Internet Architecture/psreports]
```

24. Select *I* for Next and to display a summary of your selections.

The summary of your selections displays for your review and confirmation and will look similar to the following example.

```

Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] :

-----

Setup Type : websphere
WebSphere application sever directory :
Web server version : 7.0.0.0
Web server node : peoplesoft
Internet Architecture app name : PORTAL
Integration Gateway app name : PSIGW
PeopleSoft Business Interlink app name : PSINTERLINKS
PeopleSoft Online Library Infrastructure : PSOL
Environment Management Hub : PSEMHUB
Hello Portlet app name : helloportletapp
Portlet Container app name : pspc
Testsuite app name : testsuite
Wsrptest app name : wsrptest
Site name : ps
Authentication Token Domain :
Application server name : ul-sun10
JSL port : 9000
Report repository directory : /ds1/home/upgtest2/PeopleSoft Internet
Architecture/psreports
PIA webserver directory : /data1/oradata/CR91T204/webserv
Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] :

```

IBM WebSphere Summary window

25. Select *I* for Next.
26. You will receive the following message:

```

Installation Complete Congratulations!
Peoplesoft Internet Architecture has been successfully installed to:data1/home=>
/adconfig/PT850/webserv

```

27. Press Done to quit the installer.
28. Press ENTER to exit the Installer.

## Task 3-14-3: Installing Adobe Graphic Dialog Flow Designer on Microsoft Windows

Graphic Dialog Flow Designer is an Adobe Flex application on the PeopleSoft Pure Internet Architecture server. This task details how to deploy the Adobe Graphic Dialog Flow Designer on Microsoft Windows for both Oracle WebLogic and IBM WebSphere.

1. Verify that files *DialogDesigner\_wl.ZIP* for Oracle WebLogic, and *DialogDesigner\_ws.ZIP* for IBM WebSphere, are located at: `<PS_HOME>\setup\PsMpPIAInstall\archives\`
2. After you install the PeopleSoft Pure Internet Architecture server, run the *setup.bat* from `<PS_HOME>\setup\PsMpPIAInstall` again to install the OLM extension.
3. Enter the same information that you used during the installation of the PeopleSoft Pure Internet Architecture server, with the exception of the next two steps (4 and 5).
4. Select Existing Weblogic/WebSphere Domain and Deploy additional PeopleSoft extensions in the next step of the PeopleSoft Pure Internet Architecture Installation Wizard.
5. Check the Dialog Designer check box.
6. After installation completes, the flex application will be deployed as follows:
  - For Oracle WebLogic: `<PS_HOME>\webserv\<DOMAIN_NAME>\applications\peoplesoft\PORTAL.war\crm`
  - For IBM WebSphere: `<PS_HOME>/webserv/<DOMAIN_NAME>/installedApps/peoplesoft/PORTAL.war/crm`
7. Restart the PeopleSoft Pure Internet Architecture server.

---

## Task 3-15: Setting Up Profiles

This section discusses:

- Setting Up Automatic Numbering for Profiles
- Setting Non English Based Reserved Word

### Task 3-15-1: 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, as shown in the following example, and then 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

Customize Find View All First 1 of 1 Last

*Start Seg	*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 3-15-2: Setting Non English Based Reserved Word

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

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 then 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 *orgRoleIdProfileElementName* parameter to the value of the *Individual.People.Organization Role Type* parameter.
  - e. Click Save.

---

## Task 3-16: 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 3-16-1: Improving PeopleSoft OLM Transaction Performance

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

---

**Note.** Complete this task if you plan to run the PeopleSoft Online Marketing (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*, as shown in the following example:

The screenshot shows the 'Security Object' configuration page. At the top, there are navigation buttons: Save, Run, Search, Next, Previous, Refresh, and Add Security Object. Below this, the 'Object ID' is 'PERSON' and the 'Object Name' is 'Person'. The 'Security Object Definition' section contains several fields: '\*Object Name' is 'Person', '\*Object Type' is 'Membership', 'Description' is 'Person Security Object', '\*View Record' is 'RSEC\_SL\_PER\_VW', '\*Security List Record' is 'RSEC\_ML\_PERSON', 'Object Source Navigation' is 'Person Search', 'Static List Navigation' is 'Person Static Member List', and 'Cache Option' is 'Scheduled Always'.

Security Object page

4. Click Save.

## Task 3-16-2: Starting the Daily Survey Report Data Purge

Generating Survey ACE reports increases the data volume in the report table and can affect your system performance. Starting a daily report data purge process helps to maximize system performance for Survey ACE report generation.

To start the daily survey report data purge process:

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, as shown in the following example:

**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     

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>

Process Scheduler Request page

- Click OK.

## Task 3-16-3: 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 Oracle 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 Oracle WebLogic

To check the DES Java options for DES on the Oracle WebLogic Server:

- Open the DES `SetEnv` file and check the Java options.
- Check the value of SET JAVA\_OPTIONS\_WIN32=.
- If `-Xms32m -Xmx300m -XX:MaxPermSize=128m` 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 an IBM WebSphere Server:

- 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:

```
<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 -Xrunjdpw: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

This chapter discusses:

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

---

## Understanding PeopleSoft Order Capture SelfService

This chapter provides instructions for the installation and setup of Oracle's PeopleSoft Enterprise Order Capture Self-Service (OCSS) 9.1 with PeopleSoft Pure Internet Architecture. These instructions assume that you have already installed and configured a PeopleSoft Enterprise CRM 9.1 database following the instructions that are provided earlier in this guide.

See "Installing PeopleSoft Enterprise CRM 9.1 Applications."

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

PeopleSoft 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 provides improved performance, increased security, and minimizes downtime for your website.

### See Also

*PeopleSoft Enterprise PeopleTools 8.50 Installation (for your database platform) on My Oracle Support*

*PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration on My Oracle Support*

## 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 User Profile - General page appears, as shown in the following example:

The screenshot displays the 'User Profile - General' page with the following details:

- General Tab:**
  - User ID: GUEST
  - Description: Guest
  - Account Locked Out?
- Logon Information:**
  - Symbolic ID: sa
  - Password: [Redacted]
  - Confirm Password: [Redacted]
  - User ID Alias: [Empty field]
  - Expire password at next login
- General Attributes:**
  - Language Code: English
  - Currency Code: US Dollar
  - Default Mobile Page: [Empty field]
  - Enable Expert Entry
- Permission Lists:**
  - Navigator: ALLPAGES
  - Homepage: ALLPAGES
  - Process Profile: ALLPAGES
  - Primary: ALLPAGES
  - Row Security: ALLPAGES

User Profile page: General tab

To define the business unit, select Set Up CRM, Security, User Preferences.

The Overall Preferences page appears, as shown in the following example:

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>				
<b>Partner Relationship Type</b>				
<b>*Market</b>	Global			
<b>Order Capture Unit</b>	APP01			
<b>Mobile Customer Options</b>				
<b>PIM Preference ID</b>				
	<input type="checkbox"/> <b>Alternate Character Enabled</b>			
	<input type="checkbox"/> <b>Wealth Management</b>			

Overall Preferences page

This business unit must be a valid PeopleSoft Order Capture (OC) business unit.

If no business unit is defined on the Overall Preferences page, the default business unit is determined by using the Default Business Unit option set on the Order Capture Business Unit definition page.

To define or view PeopleSoft Order Capture business units:

1. Select Setup CRM, Business Unit Related, Order Capture Definition.
2. Verify that your guest user is set up to meet your business needs.

The following example shows the Internal page displaying the default business unit:

Internal business unit page

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences."

## Understanding the Homepage URL

The URL of your PeopleSoft Order Capture Self-Service (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 are installing PeopleSoft OCSS, your URL would be:

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

## Task 4-1: Defining the Guest User

You can 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 group box.
4. Select the Allow Public Access check box.
5. Enter *GUEST* in the User ID field and in the Password field, as shown in the following example:

Web Profile Configuration: Security page

6. Click Save.

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

Disable the New Window link 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 and modify the web server *configuration.properties* file:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Open the DEV profile definition.
3. Clear the Enable New Window check box, as shown in the following example:

**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/htmldoc/crm88sp1/f1 search.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

4. Click Save.

## CHAPTER 5

# Integrating PeopleSoft Order Capture Self-Service

This chapter discusses:

- Understanding Additional Component Integration
- Integrating the PeopleSoft Freight Calculation
- Setting Up Business Interlink Architecture for Tax
- Installing ADP Taxware and Vertex Databases
- Setting Up PeopleSoft OC with ADP Taxware WorldTax

---

## Understanding Additional Component Integration

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

---

**Note.** Before proceeding with your installation consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft Enterprise CRM 9.1 Installation Guide, PeopleSoft Enterprise PeopleTools Installation guide for your database platform, and PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks.

---

**Note.** Additionally, consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

---

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

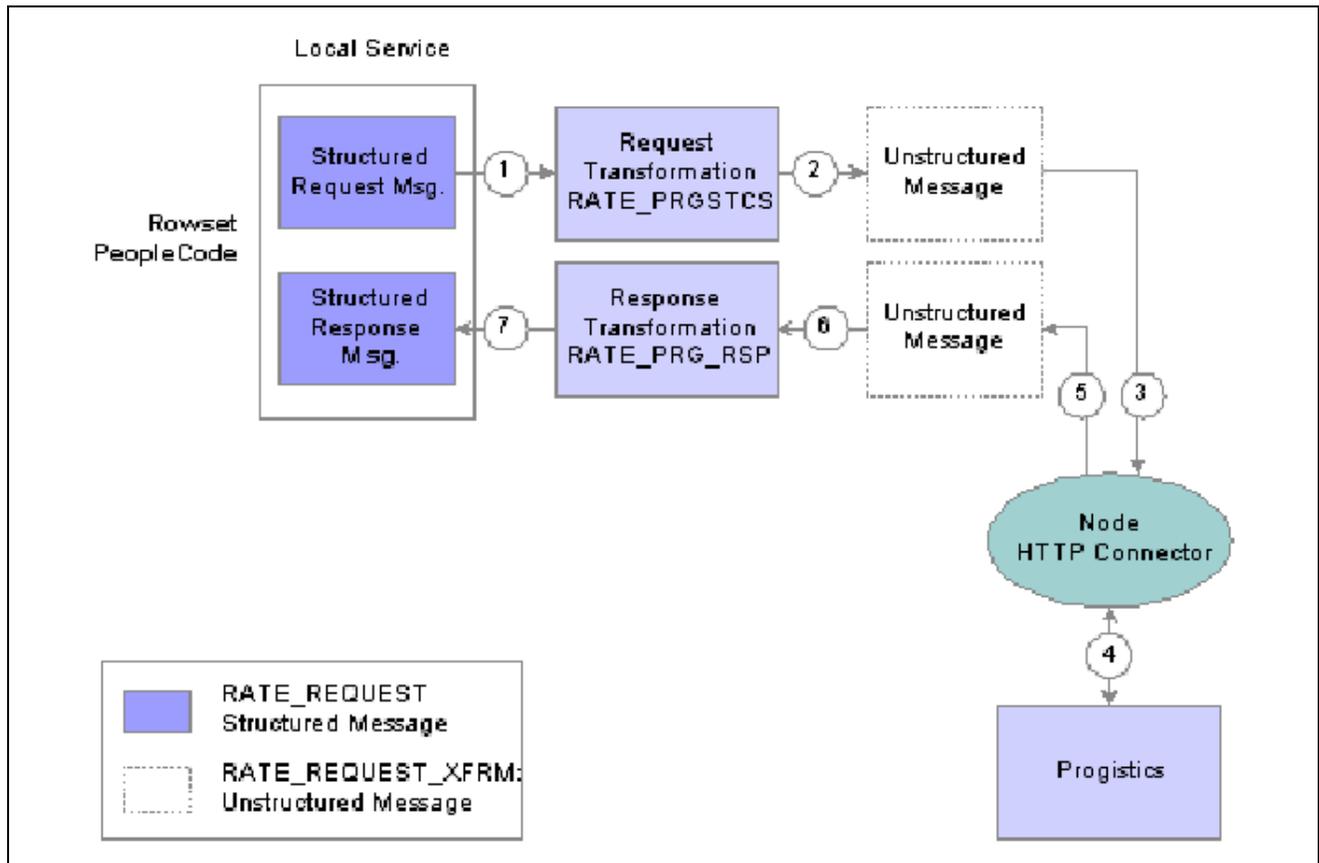
This section discusses:

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

## Understanding PeopleSoft Freight Calculation

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 diagram 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, as shown in the following example:

The screenshot displays the 'Service Operation: General' configuration page. At the top, there are three tabs: 'General', 'Handlers', and 'Routings', with 'General' selected. The main content area is divided into several sections:

- Service Operation:** RATE\_REQUEST
- Service:** RATE\_REQUEST
- Operation Type:** Synchronous
- \*Operation Description:** Freight Calc Rate Request
- Operation Comments:** (Empty text area)
- Object Owner ID:** Order Capture Internal
- Operation Alias:** (Empty text area)
- Default Service Operation Version:** VERSION\_1
- Version Description:** Freight Calc Rate Request
- Version Comments:** (Empty text area)
- Routing Status:**
  - Default
  - Active
  - Any-to-Local:** Does not exist
  - Local-to-Local:** Does not exist
- Routing Actions Upon Save:**
  - Non-Repudiation
  - Runtime Schema Validation
  - 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

4. Click Save.
5. 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*, as shown in the following example:

**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 View All First 1 of 1 Last

Operation	Version
RATE_REQUEST	VERSION_1

Define Partitioning 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. Click Save.
7. 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, as shown in the following example:

**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

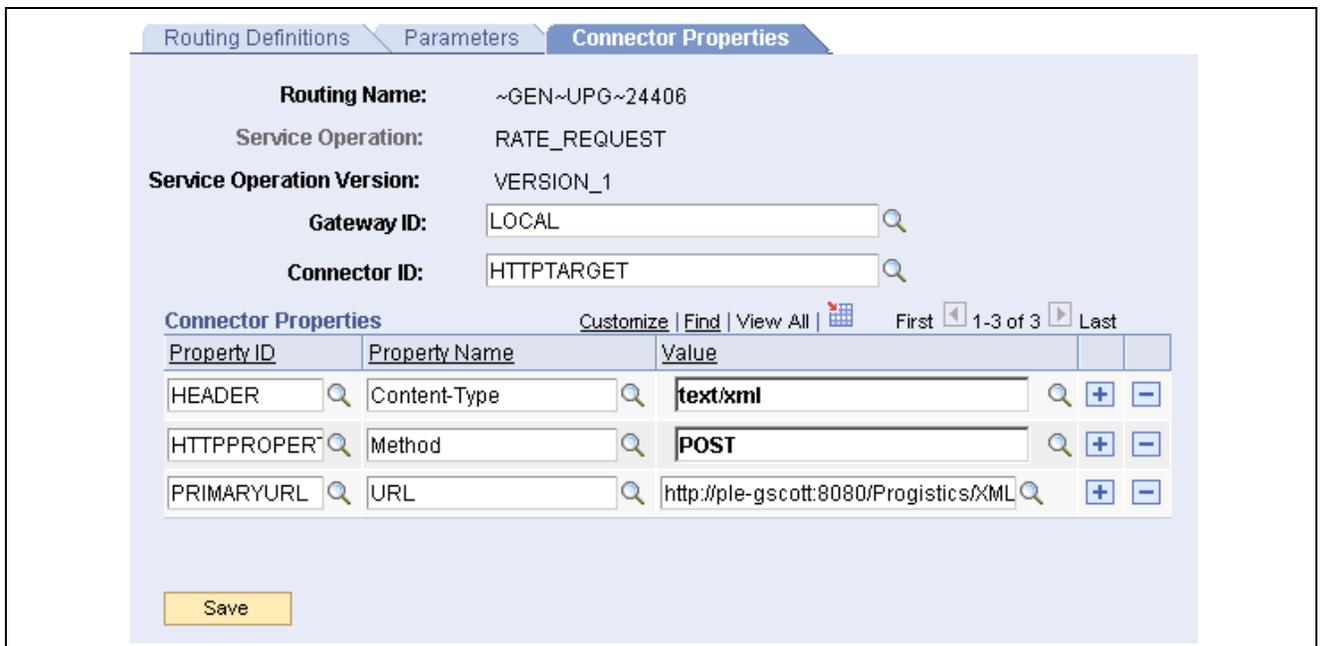
Routing Definitions page

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

8. Set up the connector properties for the freight server. Click the Connector Properties tab to access the Connector Properties page.
9. On the Connector Properties page, enter rows with the field values, as listed in the following table:

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>/Progistics/XML_Processor/Server/XMLProcDLL.asp. If you are not using port 80 on the progistics server, indicate the port in this the url, for example, <machine>:8080 .

The following shows an example of the Connector Properties page with the values entered from the table:



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 Progistics for your business unit, the test can not calculate freight amounts.

1. Select Setup CRM, Business Unit Related, Order Capture Definition.

This opens the Progistics Business Unit definition set up within PeopleSoft CRM, as shown in the following example:

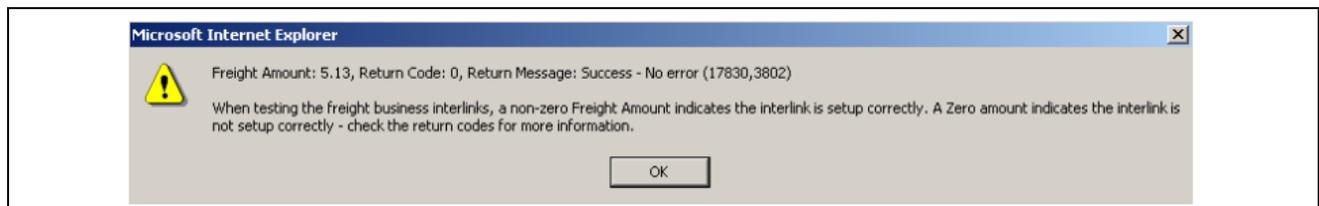
The screenshot shows the 'Internal Self Service' interface for 'Order Capture Definition'. It is divided into several sections:

- Business Unit:**
  - Business Unit: US001
  - \*Description: New York Operations
  - \*Short Description: US001
  - \*Status: Open
  - Default Business Unit
  - Submit Confirmation
  - Show Communications Tab
- Business Unit (Secondary):**
  - FieldService: US200
  - Marketing: US001
  - Order Management: US001
  - Proposal Management: [Empty]
  - Contracts: [Empty]
  - General Ledger: [Empty]
- Tax Settings:**
  - \*Tax Vendor: None (with [Test Tax Interlink](#) link)
  - Company: PSFT
  - Order Origin: New Jersey Operations
  - Division: [Empty]
  - Order Acceptance: California Location
  - Store Location: [Empty]
- Order Capture:**
  - \*Freight Vendor: None (with [Test Freight](#) link)
  - \*Card Vendor: None
  - Ship From: Connecticut Operations
  - Source: Phone
  - Preferred Carrier: [Empty]
  - Capture Priority: Medium
  - Quote Conversion Warning: No Warning
  - Base Currency: US Dollar
  - \*Site Address Includes: Customer Bill To Addresses
  - Rate Type: Average

Order Capture Definition - Internal page (partial)

2. Click the Test Freight link.

A message box displays with the results of your test, as shown in the following example:



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

This section discusses:

- Understanding the Business Interlink Setup
- Selecting Vendor Plug-in Locations
- Editing the Application Server Configuration File

- Selecting Vendor DLLs and Shared Library Locations

## Understanding the Business Interlink Setup

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

---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

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 Microsoft Windows dynamic link library delivered to PeopleSoft CRM customers by each tax vendor as follows:

- For Vertex, this objects points to file://psbivrtx.dll.
- For ADP Taxware, the object points to file://pstxwint.dll.

---

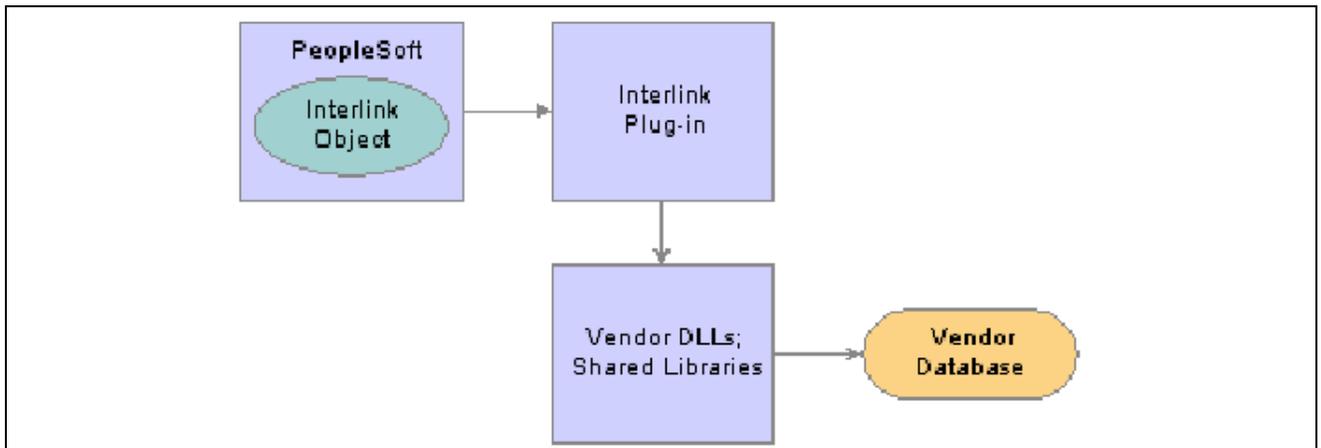
**Important!** For UNIX, the 64 bit plug-ins are required. Contact Vertex or ADP Taxware directly to obtain the 64 bit plug-ins required for integration with PeopleSoft Enterprise CRM and Order Capture.

---

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 following diagram 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 the 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 directories listed in the following table:

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.

---



---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

## 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:

- For Microsoft Windows:

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

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.

- For UNIX:

Typically, the vendor libraries should be placed in the same directory with 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 and shared library or vendor supplied DLL and shared library, an error displays.

---

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

This section discusses:

- Understanding the ADP Taxware and Vertex Install
- Installing ADP Taxware
- Installing Vertex

### Understanding the ADP Taxware and Vertex Install

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, database types and installation instructions.

---

**Note.** After you install the vendor software, 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 and 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:

- For Microsoft Windows:

ADP Taxware provides the following 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 INI files into the WINNT directory. Each file contains a set of pointer variables that should point to the location where the ADP Taxware database files were placed during the installation of the ADP Taxware software.

- For 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 the installation of the ADP Taxware software.

## Task 5-3-2: Installing Vertex

To install Vertex on these operating systems, do the following:

- For Microsoft Windows:

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

- For 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 8.50 PeopleBook: PeopleSoft Business Interlink*, "Business Interlinks for Application Developers."

---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

## Task 5-4: Setting Up PeopleSoft OC with ADP Taxware WorldTax

This section discusses:

- Understanding ADP Taxware WorldTax Integration
- Integrating PeopleSoft OC with ADP Taxware
- Testing the Integration

### Understanding ADP Taxware WorldTax Integration

PeopleSoft Order Capture (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, which then calculates the appropriate VAT amount and returns it to PeopleSoft CRM. These VAT amounts are displayed on the order.

See *PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Business Interlink*, "Business Interlinks for Application Developers."

---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

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

To integrate PeopleSoft Order Capture (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 Java environment is installed and running on your application server.

See *PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Business Interlinks*, "Setting Up A Business Interlink Runtime Plug-In."

See *PeopleSoft Enterprise PeopleTools 8.50 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."

---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

4. Copy 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 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 developed by PeopleSoft 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."

---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

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

After you integrate PeopleSoft OC with ADP Taxware, as instructed in the previous section, you can test the integration.

To test the business interlink:

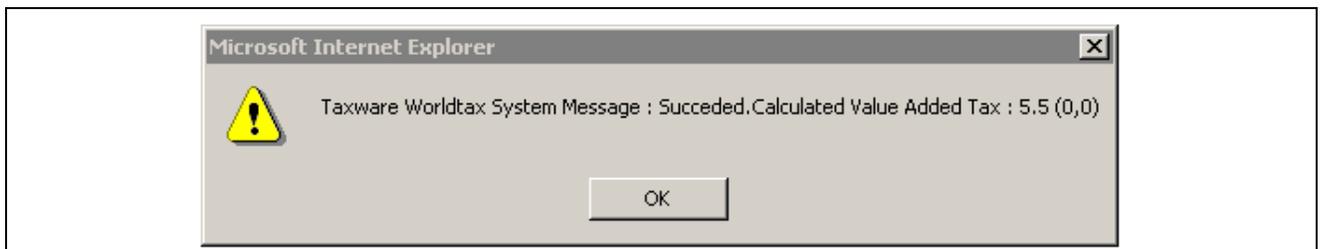
---

**Note.** PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

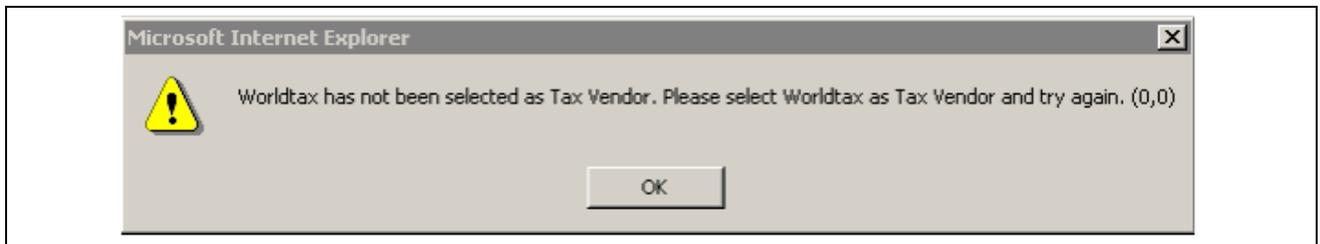
1. From the PeopleSoft CRM menu, select Set Up CRM, Business Unit Related, Order Capture Definition.
2. Select *WorldTax* from the Tax Vendor drop-down list box, and then click the Test WorldTax Interlink button.

If the environment is set up correctly, the success message *Taxware Worldtax System Message: Succeeded. Calculated Value Added Tax: 5.5* displays, as shown in the following example:



Taxware Worldtax success message

3. If you do not select *WorldTax* from the Tax Vendor drop-down list and click the Test Worldtax Interlink button, the error message *Worldtax has not been selected as Tax Vendor. Please select Worldtax as Tax Vendor and try again* displays, as shown in the following example:



Worldtax system error message

## CHAPTER 6

# Integrating PeopleSoft Customer Relationship Management 9.1 with Oracle E-Business Suite

This chapter discusses:

- Understanding PeopleSoft CRM and Oracle EBS Integration
- Prerequisites
- Integrating PeopleSoft CRM for Oracle EBS using Fullsync
- Integrating PeopleSoft CRM for Oracle EBS using Incremental Sync
- Integrating PeopleSoft CRM for Oracle EBS using PeopleSoft 360-Degree
- Setting Up Action Links
- Setting Up Basic Business Events Subscriptions
- Creating New Business Events to Indicate Target URLs
- Setting the Encryption Key
- Applying Patches for Incremental Sync
- Publishing the PeopleSoft 360-Degree WSDLs
- Verifying Set Up Between PeopleSoft CRM and Oracle EBS

---

## Understanding PeopleSoft CRM and Oracle EBS Integration

This chapter discusses the basic integration setup required in PeopleSoft Enterprise Customer Relationship Management (CRM) for integration with Oracle E-Business Suite (EBS). This document does not contain details of the PeopleSoft integration framework. Tasks discussed in this document are based on the latest PeopleSoft PeopleTools release.

Three types of integration are involved when integrating PeopleSoft CRM and Oracle EBS:

- Data Synchronization to transfer relevant data from the Oracle EBS HR system to the PeopleSoft CRM system to create cases.

This is performed in one of the following modes:

- *Fullsync* mode: This mode copies the entire set of data from Oracle EBS.
- *Incremental sync* mode: This mode only copies newly added or updated data.
- The PeopleSoft 360 Degree page.

The PeopleSoft 360 Degree page retrieves data in *synchronous* mode.

---

## Prerequisites

For integration of PeopleSoft CRM and Oracle EBS, ensure that your system meets the following criteria:

1. You have installed and configured PeopleSoft PeopleTools 8.50 or higher.
2. You have installed and configured PeopleSoft Enterprise Customer Relationship Management (CRM) 9.1 or higher.
3. Oracle E-Business Suite (EBS) Human Capital Management (HCM) - Build X1 or higher (the latest build available at the time of your install).
4. A dedicated Integration Broker.
5. All Service Operations and Messages set to *Active*.
6. WSDL must be published for all Services named (beginning with RC\_EBS).
7. Oracle EBS\_HR node configured to point to the Oracle EBS domain (the domain defined in the latest Oracle EBS HCM build).
8. You have access to the FTP location of the Oracle EBS Domain (where the files are created from the Full Sync process).
9. You have access to the Oracle EBS database (and you are able to use SQL Developer, SQLPlus, and so on).
10. Business Events discussion.
11. PeopleSoft 360-Degree Set Up.

---

## Task 6-1: Integrating PeopleSoft CRM for Oracle EBS using Fullsync

This section discusses:

- Setting Up Service Operations for Fullsync
- Verifying Schemas for all Messages for Fullsync
- Configuring the Process Scheduler for Fullsync
- Locating the Fullsync Data File Folders
- Retrieving and Copying Fullsync Oracle EBS Data Files to the Process Scheduler

### Task 6-1-1: Setting Up Service Operations for Fullsync

The fullsync process does not use integration set up. Instead, Fullsync mode uses Service Operations and Messages for coding efficiency.

To verify that all service operations are active:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Verify that the following Service Operations are available and set to *Active* in the PeopleSoft CRM system:
  - RC\_EBS\_DEPARTMENT\_INC\_SO

- RC\_EBS\_JOBCODE\_INC\_SO
- RC\_EBS\_LOCATION\_INC\_SO
- RC\_EBS\_PERSON\_INC\_SO
- RC\_EBS\_WORKFORCE\_INC\_SO
- JOBCODE\_FULLSYNC
- PERSON\_BASIC\_FULLSYNC

## Task 6-1-2: Verifying Schemas for all Messages for Fullsync

To verify that all messages have schemas defined:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.  
Open the message and click the Schema tab to access the Schema page.
2. Verify that the following messages have schemas defined:
  - RC\_EBS\_DEPARTMENT\_INC, version 1.
  - RC\_EBS\_JOBCODE\_INC, version 1.
  - RC\_EBS\_LOCATION\_INC, version 1.
  - PERSON\_BASIC\_SYNC, Version 3.
  - WORKFORCE\_SYNC, version 2.
3. If no schemas exist, do the following:
  - a. Handle the first three messages as bugs (RC\_EBS\_DEPARTMENT\_INC, RC\_EBS\_JOBCODE\_INC and RC\_EBS\_LOCATION\_INC), following your organization's *bug* procedures. This may involve contacting Oracle Global Customer Support (GCS).

---

**Important!** Rowset based messages must have schemas defined and are delivered with schemas. If any schemas are missing, you must treat it like a bug and assume that something did not install or copy correctly, causing the schemas to be lost.

---

  - b. For PERSON\_BASIC\_SYNC and WORKFORCE\_SYNC, click the Build Schema button on the Schemas page.  
As in step 1, you can access the Schema page by selecting PeopleTools, Integration Broker, Integration Setup, Messages. Open the message and click the Schema tab to access the Schema page.
4. If the Build Schema button is not visible, check the Service Configuration component. Ensure that the Service System Status is set to *Development*.
5. On Message Definition main page, if your new build displays a PeopleSoft PeopleTools message indicating that there is some inconsistency between the WSDL publish status and the actual WSDLs, or if the entire page is in Read Only mode and you cannot build a schema, do the following to clear the WSDL publish status:
6. On Message Definition main page, if your new build displays a PeopleSoft PeopleTools message indicating that there is some inconsistency between the WSDL publish status and the actual WSDLs, or if the entire page is in Read Only mode and you cannot build a schema, do the following to clear the WSDL publish status:
  - a. Select PeopleTools, Service Utilities, Service Administration.

- b. Click the Clear WSDL export status link.

### Task 6-1-3: Configuring the Process Scheduler for Fullsync

To configure your process scheduler for Fullsync:

1. Create your own process scheduler using psadmin.
2. Start the server once, to register it.
3. Shut down the server.

Shutting down the server is not required but recommended. Server shut down ensures that the server definition changes will be applied when you restart the server.

4. Select PeopleTools, Process Scheduler, Servers.
5. Search for and open the server that you just created.
6. On Server Definition page, in the Server Load Balancing Option field, select *Do not use for Load Balancing* from the drop-down list box.
7. In the Redistribute Workload Option field, select *Do not redistribute* from the drop-down list box.
8. Click the Save button to save the server definition.
9. Restart the process scheduler from psadmin.

From the database list, select the database of the process server that you just created to start the process server. Allow a few minutes for the startup process to complete.

### Task 6-1-4: Locating the Fullsync Data File Folders

After you run the Fullsync process in Oracle EBS, the Fullsync Data files are copied under the ftp <EBS Server Name> and folder:

Generally, this folder is located under *Documents and Settings\<Windows User>\psft\pt\<Tools Release>\appserv\prcs\<DB Name>\files*.

See Retrieving and Copying Fullsync EBS Data Files to the Process Scheduler

If you cannot locate or access the file, contact the group within your organization that handles your environments (this may be your Environments Group, your Network Administrator, or another entity within your organization).

### Task 6-1-5: Retrieving and Copying Fullsync Oracle EBS Data Files to the Process Scheduler

Before you can copy the Fullsync data file to the process scheduler folder, you must retrieve that file from the Oracle EBS server.

Use the Microsoft Windows *ftp* command to copy the file to your local machine. The file can then be copied to the Process Scheduler Server folder.

1. To obtain the Request ID from the Oracle EBS server:
  - a. Login to the Oracle EBS server using hrms/welcome.
  - b. Select the responsibility Superuser HRMS Manager, Vision Corporation.
  - c. Select Processes and Reports, View Requests.

- d. Select All my requests, and if required change the number of days value, and then click the Find button.
  - e. Write down the request ID.
2. Obtain the path and file name by running SQL in the SQL Developer and connecting to the Oracle EBS database.

Select *outfile\_name* from *fnd\_concurrent\_requests* where *request\_id* = <request id>

3. Open the DOS command window and change the directory to the folder where you want the data file to be copied on your local machine.

If you are using your c:\temp directory to copy files to your local machine, do the following:

- a. From your Start button, select Run.
  - b. In the Run dialog box, enter *cmd*, and then press the Enter key on your keyboard.
  - c. In the cmd.exe DOS prompt, enter *cd\temp*, and then press the Enter key on your keyboard.
4. Use the ftp command to connect to the Oracle EBS server. Retrieve the user ID and password to connect to the Oracle EBS domain using the FTP from your environments group. Your regular user ID that you use to login to your applications will not work.

---

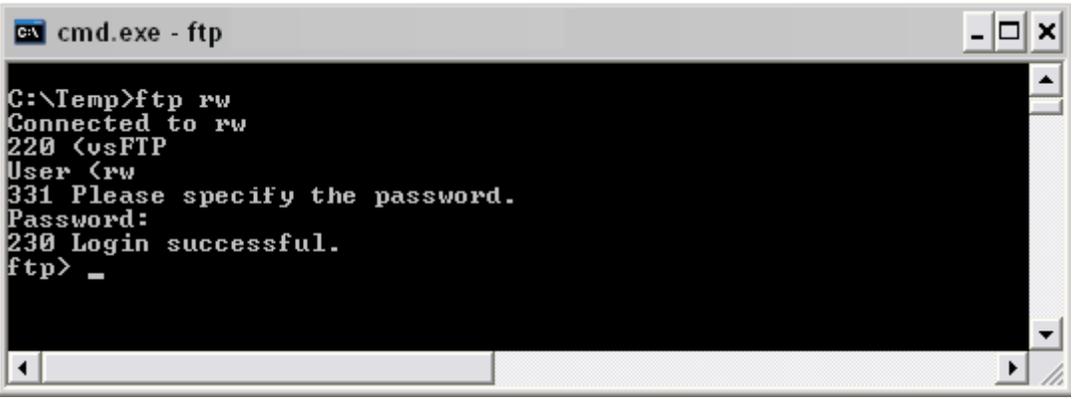
**Note.** Oracle's Environments Group sets user IDs and passwords for FTP usage independently from any other user ID and password, due to security concerns and standards. The FTP user ID and password for access must be obtained from the group within your organization that sets and maintains the security settings. The following is an example session that shows the starting and executing of FTP on a Microsoft WindowsXP client:

---

Usage: *ftp* <EBS Server Name>

5. Enter the user ID and password.

Verify that you receive the message *Login Successful*, as shown in the following example:



```

C:\Temp>ftp rw
Connected to rw
220 (vsFTP
User <rw
331 Please specify the password.
Password:
230 Login successful.
ftp> _

```

Command Window

6. Use the get command to retrieve the file.

You must use the same path and file name that you retrieved from the database in step 2, as shown in the following example:

```

cmd.exe - ftp
ftp> get /slot/ /appmgr/inst/apps/ 2 8rens/logs/appl/conc/out
/o1 .out
200 PORT command successful. Consider using PASV.
150 Opening BINARY mode data connection for /slot/ /appmgr/inst/apps/
r12_r rens/logs/appl/conc/out/o1 .out (1 bytes).
226 File send OK.
ftp: 1 bytes received in 72.03Seconds 152.00Kbytes/sec.
ftp> _

```

Command Window showing the get command to retrieve the file

Usage: *get <path>/filename*

7. If the file is transferred to your local workstation successfully, you will receive the message *OK*.
8. Copy this file to the Process Scheduler server as explained in the task *Configuring the Process Scheduler for Fullsync*.

See "Configuring the Process Scheduler for Fullsync"

This concludes your integration set up in PeopleSoft CRM using Fullsync.

---

## Task 6-2: Integrating PeopleSoft CRM for Oracle EBS using Incremental Sync

This section discusses:

- Setting Up the Local Gateway for Incremental Sync
- Verifying Schemas for all Messages for Incremental Sync
- Verifying Service Operations for Incremental Sync
- Verifying Handlers for Incremental Sync
- Verifying Routings for Incremental Sync
- Verifying Nodes for Incremental Sync
- Publishing WSDLs for Service Operations for Incremental Sync

### Task 6-2-1: Setting Up the Local Gateway for Incremental Sync

Incremental Sync uses the PeopleSoft Integration Gateway to receive messages that are published by the Oracle EBS system.

Ensure that the Local Gateway is set up correctly:

1. Select PeopleTools, Integration Broker Configuration, Gateways.
2. Search for and open the local gateway to access the Gateways page.
3. On the Gateway Definition page, click the Ping Gateway button.
4. Verify that the status window indicates the Gateway is active.

## Task 6-2-2: Verifying Schemas for all Messages for Incremental Sync

To verify that all messages have schemas defined:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.  
Open the message and click the Schema tab to access the Schema page.
2. Verify that the following messages have schemas defined:
  - RC\_EBS\_DEPARTMENT\_INC, version 1.
  - RC\_EBS\_JOBCODE\_INC, version 1.
  - RC\_EBS\_LOCATION\_INC, version 1.
  - PERSON\_BASIC\_SYNC, Version 3.
  - WORKFORCE\_SYNC, version 2.
  - RC\_EBS\_PERSON\_INC, version 1.
  - RC\_EBS\_WORKFORCE\_INC, version 1.
3. If no schemas exist, do the following:
  - a. Handle the first three messages as bugs (RC\_EBS\_DEPARTMENT\_INC, RC\_EBS\_JOBCODE\_INC and RC\_EBS\_LOCATION\_INC), following your organization's *bug* procedures. This may involve contacting Oracle Global Customer Support (GCS).

---

**Important!** Rowset based messages must have schemas defined and are delivered with schemas. If any schemas are missing, you must treat it like a bug and assume that something did not install or copy correctly, causing the schemas to be lost.

---

- b. For PERSON\_BASIC\_SYNC and WORKFORCE\_SYNC, click the Build Schema button on the Schemas page.  
  
As in step 1, you can access the Schema page by selecting PeopleTools, Integration Broker, Integration Setup, Messages. Open the message and click the Schema tab to access the Schema page.
4. If the Build Schema button is not visible, check the Service Configuration component. Ensure that the Service System Status is set to *Development*.
5. On Message Definition main page, if your new build displays a PeopleSoft PeopleTools message indicating that there is some inconsistency between the WSDL publish status and the actual WSDLs, or if the entire page is in *Read Only* mode and you cannot build a schema, do the following to clear the WSDL publish status:
  - a. Select PeopleTools, Integration Broker, Service Utilities, Service Administration.
  - b. Click the Clear WSDL export status link to clear the WSDL publish status.

## Task 6-2-3: Verifying Service Operations for Incremental Sync

To verify that the following service operations are active:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations to access the Service Operations pages.
2. On the General page, verify that the following Service Operations are available and set to *Active* in the PeopleSoft CRM system:

- RC\_EBS\_DEPARTMENT\_INC\_SO
- RC\_EBS\_JOBCODE\_INC\_SO
- RC\_EBS\_LOCATION\_INC\_SO
- RC\_EBS\_PERSON\_INC\_SO
- RC\_EBS\_WORKFORCE\_INC\_SO

## Task 6-2-4: Verifying Handlers for Incremental Sync

To verify that handlers are defined:

1. Verify that each service operation in the previous task has a handler.
2. Click the Handlers tab to access the Handlers page and review each of the service operation definitions.

A specified handler with a status of *Active* should be present, as shown in the following example:

The screenshot displays the Oracle PeopleTools interface for the 'Handlers' tab of a service operation. The breadcrumb trail is: Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations. The 'Handlers' tab is selected, and the service operation details are: RC\_EBS\_DEPARTMENT\_INC\_SO, Default Version: V1, and Operation Type: Asynchronous - One Way. Below this is a table with the following data:

*Name	*Type	Sequence	*Implementation	*Status		
Department	OnNotify	1	Application Class	Active	Details	+ -

At the bottom of the interface, there are 'Save' and 'Return to Search' buttons.

Handlers tab

3. If no handler is specified, treat this issue as a bug and follow your organization's *bug* procedures. This may involve contacting Oracle Global Customer Support (GCS).

**Important!** Handlers *must* be defined and are delivered accordingly by Oracle. If any handlers are not defined, you must treat this issue like a bug and assume that something did not install or copy correctly, causing the handler definitions to be lost.

## Task 6-2-5: Verifying Routings for Incremental Sync

Each of the service operations discussed in the previous task should contain at least one inbound routing.

Verify this by clicking the Routings tab to access the Routings page and review each of the service operation definitions.

## Task 6-2-6: Verifying Nodes for Incremental Sync

To verify that the EBS\_HR node is set to active:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Node definitions page, verify that the Active Node check box is selected for the EBS\_HR node.
3. Verify that the Default User ID field contains a valid default user ID.

If the user ID is missing, contact your environments department. Your regular user ID and password that you use to access other applications will not work.

---

**Note.** Oracle's Environments Group sets user IDs and passwords for FTP usage independently from any other user ID and password, due to security concerns and standards. The FTP user ID and password for access must be obtained from the group within your organization that sets and maintains these security settings.

---

## Task 6-2-7: Publishing WSDLs for Service Operations for Incremental Sync

Each time your database is refreshed (for example, when you receive a new build), Oracle recommends that you publish the WSDLs as follows:

1. Publish the WSDLs of the following Service Operations:
  - RC\_EBS\_DEPARTMENT\_INC\_SO
  - RC\_EBS\_JOBCODE\_INC\_SO
  - RC\_EBS\_LOCATION\_INC\_SO
  - RC\_EBS\_PERSON\_INC\_SO
  - RC\_EBS\_WORKFORCE\_INC\_SO

To clear the WSDL publish status, if the WSDLs were already published in a prior build:

2. Select PeopleTools, Service Utilities, Service Administration.
3. On the WSDL page, click the Clear WSDL export status link.  
Proceed with these steps to publish the WSDs.
4. Select PeopleTools, Integration Broker, Web Services, Provide Web Service.  
The Provide Web Service Wizard - Select Services page appears (Wizard step 1).
5. On the Provide Web Service - Select Services page, enter *RC\_EBS* in the Service Name field.
6. Click the Search link.  
Your search should pull up a list of five service operations on the Provide Web Service Wizard - Select Service Operations page (Wizard step 2).
7. Click the Select All link, and then click the Next button.  
The Select Service Operations page shows all of the service operations that you selected.
8. Click the Select All link again, and then click the Next button.

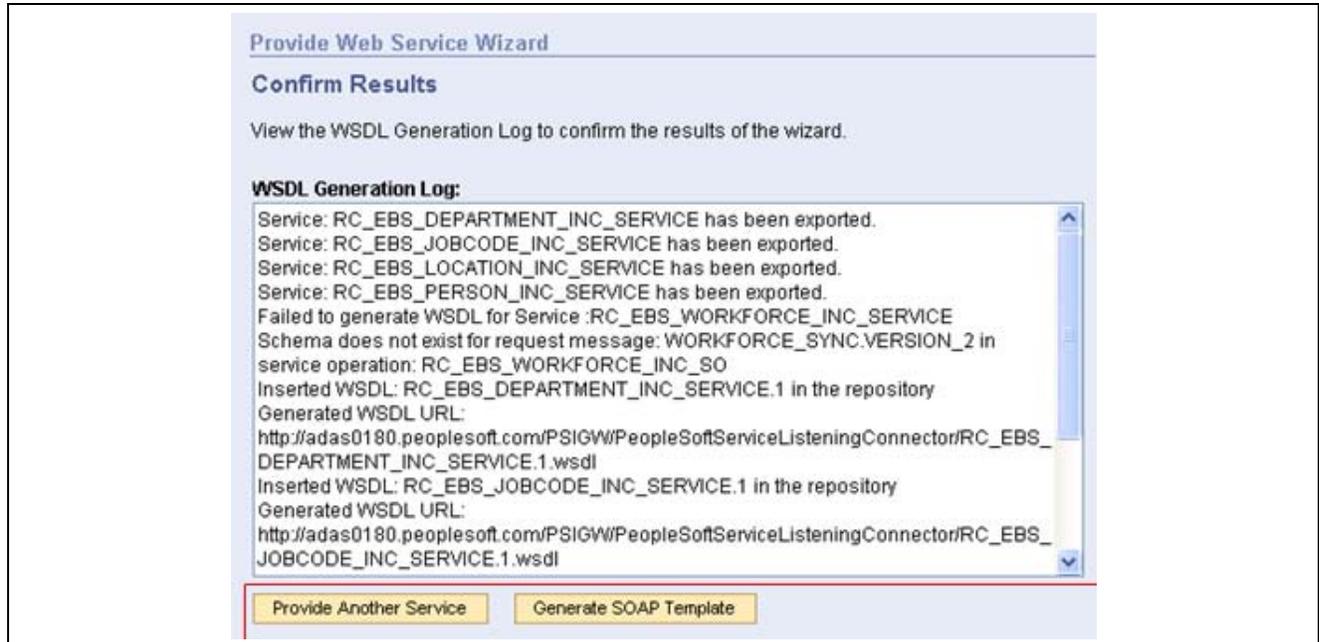
The Provide Web Service Wizard - View WSDL page (Wizard step 3) showing all Services for whom WSDLs are generated.

9. Click the Next button.

A confirmation page appears.

10. On the Provide Web Service Wizard - Specify Publishing Options page (Wizard step 4) confirmation page, click the Finish button.

The Provide Web Service Wizard - Confirm Results page (Wizard final step showing the WSDL Generation Log and details) displays important WSDL details, as shown in the following example:



Provide Web Service Wizard - Confirm Results page is the Wizard's final step and shows the WSDL generation log and details

11. Copy the content into a buffer and paste into a text editor. You will need these URLs to set up Business Events in the Oracle EBS system.
12. Use each URL that ends in *wsdl* to configure the corresponding Business Events in the Oracle EBS system.

Refer to the Oracle EBS setup document, available on My Oracle Support, for these instructions. You can paste these URLs into a separate document for later reference.

See "EBS HCM Integration with PSFT CRM setup.doc"

This concludes your integration set up in PeopleSoft CRM using Incremental Sync.

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## Task 6-3: Integrating PeopleSoft CRM for Oracle EBS using PeopleSoft 360-Degree

This section discusses:

- Setting Up Messages for PeopleSoft 360-Degree
- Setting Up Nodes for PeopleSoft 360-Degree

- Verifying Service Operations for PeopleSoft 360-Degree
- Verifying Service Operation Handlers for PeopleSoft 360-Degree
- Verifying Service Operation Routings for PeopleSoft 360-Degree

## **Task 6-3-1: Setting Up Messages for PeopleSoft 360-Degree**

To set up messages for PeopleSoft 360-Degree:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Verify that the following messages are available:
  - EBS\_360\_REQUEST, version 1.
  - EBS\_360\_RESPONSE, version 1.
  - HD\_360\_RESPONSE\_SYNC, version 2.
3. If schemas are missing for EBS\_360\_REQUEST and EBS\_360\_RESPONSE, treat this as a bug.
4. If a schema does not exist for HD\_360\_RESPONSE\_SYNC, click the Build Schema button on the Schemas page of the message definition.

## **Task 6-3-2: Setting Up Nodes for PeopleSoft 360-Degree**

### **Configuring the PSFT\_CRM Node**

The PeopleSoft 360-Degree page publishes messages to Oracle EBS in sync mode. Therefore, a URL to Oracle EBS Service WSDL is required. This is the opposite of Incremental Sync, where PeopleSoft CRM provides WSDL links to Oracle EBS.

To set up the nodes for PeopleSoft 360-Degree:

1. Publish the WSDL following the instructions from Oracle EBS Setup document that is available on My Oracle Support.  
  
See "EBS HCM Integration with PSFT CRM setup.doc"
2. Select PeopleTools, Integration Broker, Integration Setup, Nodes, to access and configure the Oracle EBS\_HR node in the PeopleSoft CRM system.
3. Verify that the local node is PSFT\_CR, as shown in the following example:

The screenshot shows the Oracle PeopleTools Integration Broker configuration page for a node named PSFT\_CR. The page is titled "ORACLE" and has a breadcrumb trail: "Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes". The page is divided into several tabs: "Node Definitions", "Connectors", "Portal", "WS Security", and "Routings". The "Node Definitions" tab is active.

The configuration fields are as follows:

- Node Name:** PSFT\_CR
- \*Description:** PSFT CRM - Local Node
- Node Type:** PIA
- \*Authentication Option:** Password
- Node Password:** [Redacted]
- \*Default User ID:** PSCR
- Hub Node:** [Empty]
- Master Node:** [Empty]
- Company ID:** [Empty]
- IB Throttle Threshold:** [Empty]
- Image Name:** [Empty]
- Codeset Group Name:** [Empty]

Checkboxes on the right side of the page:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Buttons at the bottom of the form include "Save", "Contact/Notes", "Properties", and "Return to Search".

PSFT CRM - Local Node

**Note.** Because PeopleSoft PeopleTools Integration Broker uses the local node name to sign, for testing purposes PeopleSoft PeopleTools delivers a sample digital certificate for the PSFT\_CR node. If a different node name is used, you must generate the keypair value in the *interop.jks*, and have it signed by the CA, or self-signed.

## Configuring the EBS\_HR Node

To configure the EBS\_HR node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, to access and configure the Oracle EBS\_HR node in the PeopleSoft CRM system.
2. Search for and open the EBS\_HR node.  
The Node Definitions page appears.
3. Define the EBS\_HR node definition parameters, as shown in the following example:

The screenshot displays the Oracle Integration Broker interface for defining a node. The breadcrumb trail is: Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The 'Node Definitions' tab is active, with sub-tabs for Connectors, Portal, WS Security, and Routings. The configuration for the 'EBS\_HR' node is as follows:

- Node Name:** EBS\_HR
- \*Description:** Oracle EBS
- \*Node Type:** External (dropdown menu)
- \*Authentication Option:** None (dropdown menu)
- \*Default User ID:** CVP1
- WSIL URL:** (empty text field)
- Hub Node:** (empty text field)
- Master Node:** (empty text field)
- Company ID:** (empty text field)
- IB Throttle Threshold:** (empty text field)
- Image Name:** (empty text field)
- Codeset Group Name:** (empty text field)
- External User ID:** (empty text field)
- External Password:** (empty text field)
- External Version:** (empty text field)

On the right side, there are three buttons: Copy Node, Rename Node, and Delete Node. Below the main form, there are links for Contact/Notes and Properties, and a Save button. At the bottom left, there is a 'Return to Search' button. On the right side of the form, there are several checkboxes: Default Local Node (unchecked), Local Node (unchecked), Active Node (checked), Non-Repudiation (unchecked), and Segment Aware (unchecked).

Node Definitions tab with EBS\_HR node parameters

- a. In the Node Type field, select *External* from the drop-down list.
  - b. In the Authentication Option field, select *None* from the drop-down list.
  - c. In the Default User ID field, enter *CVPI*.
  - d. Select the Active Node check box.
4. Click the Connectors tab to access the Connectors page for the EBS\_HR node.
  5. Define the EBS\_HR node connector parameters, as shown in the following example:



Connectors tab with EBS\_HR node connector parameters

- a. In the Gateway ID field, enter LOCAL.
  - b. In the Connector ID field, enter HTTPTARGET.  
Refer to the same example to now define the parameters in the Properties section (on the Properties tab), as follows:
  - c. In the Property ID field of row 1, enter *HEADER*.
  - d. In the Property Name field of row 1, enter *Content-Type*.
  - e. Select the Required check box of row 1.
  - f. In the Value field of row 1, enter *text/xml; charset=utf 8*.  
As needed, click the Add button (+) to add another row.
  - g. In the Property ID field of row 2, enter *HTTPPPROPERTY*.
  - h. In the Property Name field of row 2, enter *Method*.
  - i. Select the Required check box of row 2.
  - j. In the Value field of row 2, enter *POST*.  
As needed, click the Add button (+) to add another row.
  - k. In the Property ID field of row 3, enter *HTTPPPROPERTY*.
  - l. In the Property Name field of row 3, enter *SOAPUpContent*.
  - m. Leave the Required check box of row 3 clear (deselected).
  - n. In the Value field of row 3, enter *Y*.  
As needed, click the Add button (+) to add another row.
- The parameters for PRIMARYURL is handled differently than the previous values. For PRIMARYURL, you will use the URL of the WSDL that you generated in Oracle EBS (from step 1: Publish the WSDL by following the instructions in the Oracle EBS Setup Doc). Your PRIMARYURL row should look something like the example PRIMARYURL row, using the values that you generated from Oracle EBS.
- o. In the Property ID field of row 4, enter *PRIMARYURL*.
  - p. In the Property Name field of row 4, enter *URL*.

- q. Select the Required check box of row 4.
  - r. In the Value field of row 4, enter *http://<URL of the WSDL generated in Oracle EBS >*.
- The following example shows PRIMARYURL pointing to EBS 360 WSDL:

The screenshot shows the Oracle PeopleTools interface for the Integration Broker. The breadcrumb trail is: Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The 'Connectors' tab is selected, and the Node Name is 'EBS\_HR'. A 'Ping Node' button is visible. Below the 'Details' section, the Gateway ID is 'LOCAL' and the Connector ID is 'HTTPTARGET'. The 'Properties' table is shown with the following data:

Property ID	Property Name	Required	Value
1 HEADER	Content-Type	<input checked="" type="checkbox"/>	text/xml: charset=utf8
2 HTTPPROPERTY	Method	<input checked="" type="checkbox"/>	POST
3 HTTPPROPERTY	SOAPUpContent	<input type="checkbox"/>	Y
4 PRIMARYURL	URL	<input checked="" type="checkbox"/>	

Below the table, there is a 'Password Encryption Utility' section and a 'Save' button. At the bottom, there is a 'Return to Search' button.

Connectors tab with PRIMARYURL pointing to EBS 360 WSDL

- 6. Click the WS Security tab to access the WS Security page for the EBS\_HR node.
- 7. Define the EBS\_HR node security parameters as shown in the following example:
  - a. In the Authentication Token Type field, select *SAML Token* from the drop-down list.
  - b. Leave the Encrypted check box and the Use Default User ID check box clear.
  - c. Click Save.
- 8. Click the Routings tab to access the Routings page. Verify that the Sender Node is *PSFT\_CR* and the Receiver Node is *EBS\_HR*.

### Task 6-3-3: Verifying Service Operations for PeopleSoft 360-Degree

To verify service operations for PeopleSoft 360-Degree:

- 1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
- The Service Operations search page appears, as shown in the following example:

ORACLE

Favorites Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations

Find Service Operation Add Service Operation

Service:

Service Operation:

Operation Type:

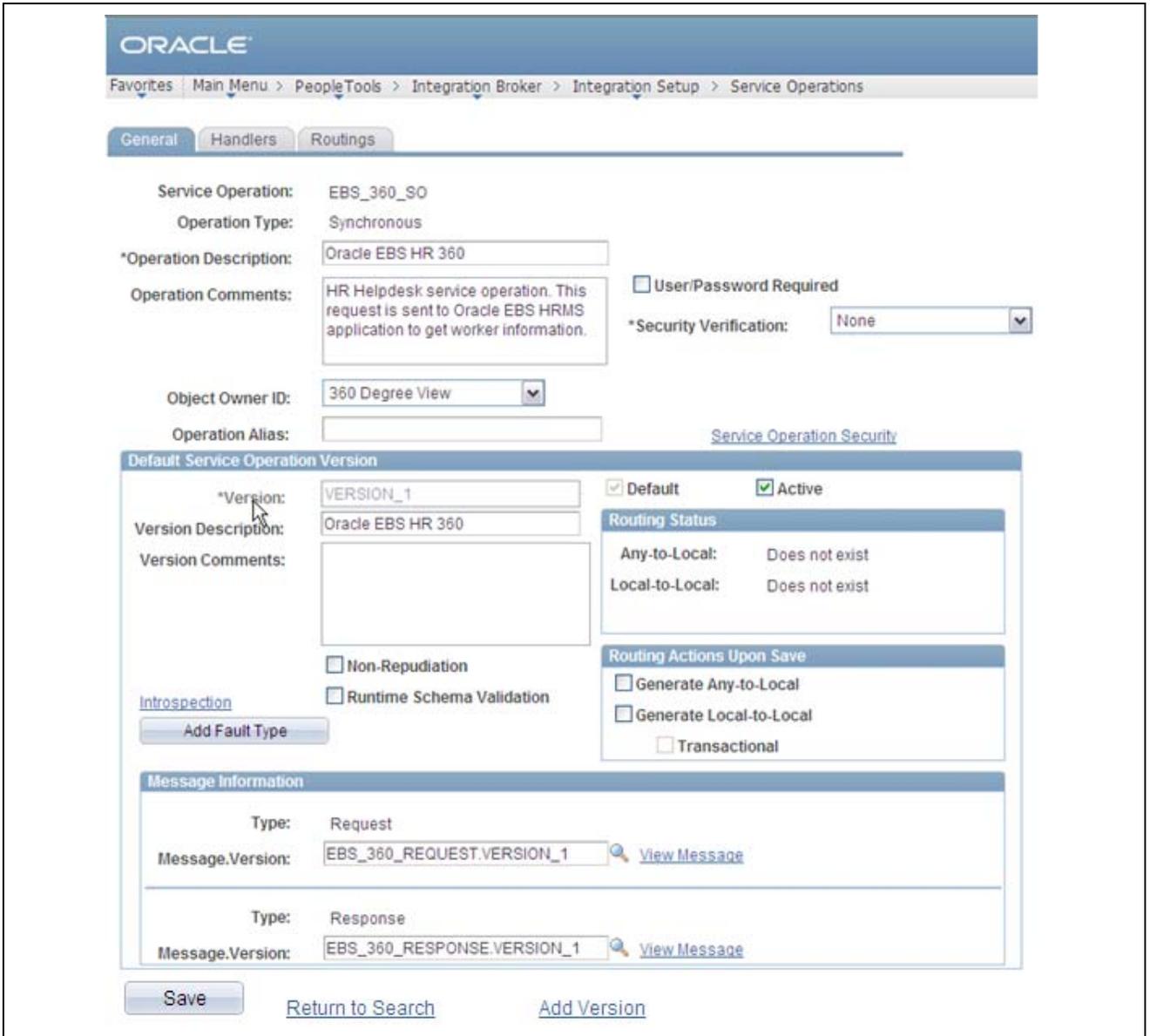
Operation Alias:

Search

Service Operations				Customize	End	View All	Find	1 of 1	Last
Service	Service Operation	Operation Type	Operation Alias						
EBS_360_SERVICE	EBS_360_SO	Synchronous							

Find Service Operation search page

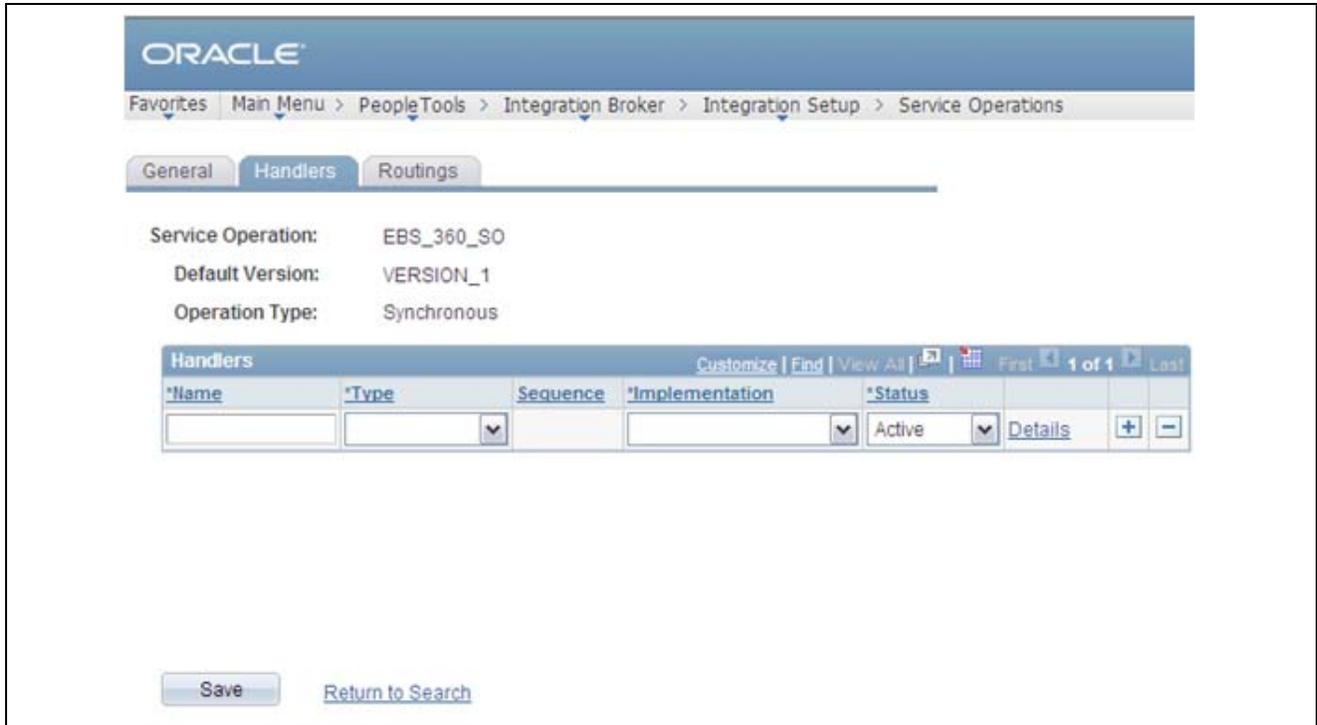
2. Enter EBS\_360\_SO in the Find Service Operations search page.
3. Open the EBS\_360 Service Operation to verify that EBS\_360\_SO is active, as shown in the following example:



Service Operation: General Page

### Task 6-3-4: Verifying Service Operation Handlers for PeopleSoft 360-Degree

From the EBS\_360\_SO General page in the previous task, click the Handlers tab (alternatively, you can select PeopleTools, Integration Broker, Integration Setup, Service Operations) to access the Handlers page displaying no handlers, as shown in the following example:

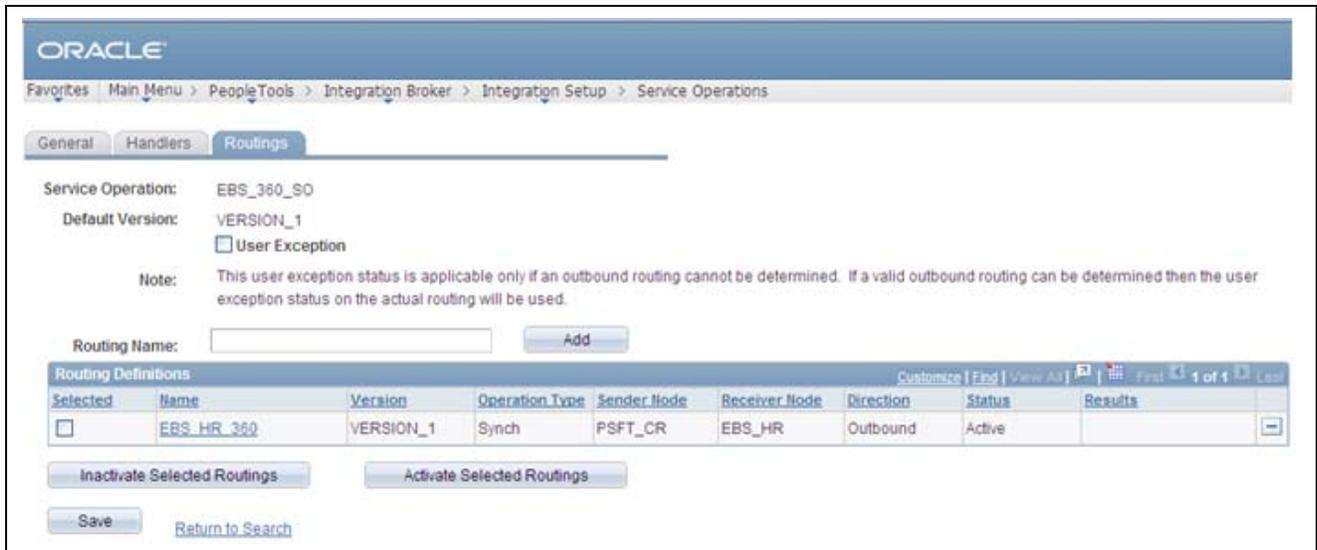


Service Operations - Handlers page for EBS\_360\_SO

The PeopleSoft 360-Degree Service Operation does *not* contain any handlers, so there is nothing to verify.

### Task 6-3-5: Verifying Service Operation Routings for PeopleSoft 360-Degree

From the EBS\_360\_SO Handlers page in the previous task, click the Routings tab (alternatively, you can select PeopleTools, Integration Broker, Integration Setup, Service Operations) to access the Routings page displaying one outbound routing, as shown in the following example:



Service Operations - Routings page for EBS\_360\_SO

There should be at least one outbound routing.

## Task 6-4: Setting Up Action Links

The Portal URI Text on the Node Definition for the Oracle EBS database must contain the URI for both the Oracle EBS database and the Oracle Function HR\_HELPDESK\_SS.

Edit the Portal URI Text field with the following modifications:

1. Select PeopleTools, Portal, Node Definitions.
2. Search for and open the Oracle EBS Node Definition (EBS\_HR node).

This opens the Node Definitions page for the Oracle EBS\_HR node, as shown in the following example:

The screenshot displays the Oracle EBS Node Definitions page for the EBS\_HR node. The page includes a navigation breadcrumb: Favorites | Main Menu > PeopleTools > Portal > Node Definitions. Below the breadcrumb are tabs for Node Definitions, Connectors, Portal, WS Security, and Routings. The main content area contains the following fields and options:

- Node Name:** EBS\_HR
- \*Description:** Oracle EBS
- \*Node Type:** External (dropdown)
- \*Authentication Option:** None (dropdown)
- \*Default User ID:** CVP1
- WSIL URL:** (text field)
- Hub Node:** (text field)
- Master Node:** (text field)
- Company ID:** (text field)
- IB Throttle Threshold:** (text field)
- Image Name:** (text field)
- Codeset Group Name:** (text field)
- External User ID:** (text field)
- External Password:** (text field)
- External Version:** (text field)

On the right side, there are several checkboxes and buttons:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Buttons on the right include Copy Node, Rename Node, and Delete Node. At the bottom, there are buttons for Save, Contact/Notes, Properties, and Return to Search.

Node Definitions page for EBS\_HR node

3. Click the Portal tab to access the Portal page.
4. In the Content URI Text field, enter the following:  
`http://<domain>:<port>/OA_HTML/OA.jsp?OAFunc=HR_HELPDESK_SS`

5. Click Save.

## Task 6-5: Setting Up Basic Business Events Subscriptions

The following instructions create the subscription for Basic Business Events in the Oracle EBS system. Business Events are an Oracle EBS mechanism that creates and sends messages to the PeopleSoft CRM system whenever a change is made in the Oracle EBS system. This setup is required for Incremental Synchronization processes to function properly.

Each of the Business Events in the following table must be subscribed to by performing steps 2 through 14 in this task.

This table lists business events and the corresponding workflow processes to be mapped:

Business Events	Workflow Process to be Mapped
oracle.apps.per.api.person_address.create_person_address	HRRIR_ADDR_CRE_PRC
oracle.apps.per.api.person_address.update_person_address	HRRIR_ADDR_CRE_PRC
oracle.apps.per.api.person_address.update_pers_addr_with_style	HRRIR_ADDR_CRE_PRC
oracle.apps.per.api.phone.create_phone	HRRIR_PHO_CRE_PRC
oracle.apps.per.api.phone.update_phone	HRRIR_PHO_CRE_PRC
oracle.apps.per.api.job.create_job	HRRIR_JOB_CRE_PRC
oracle.apps.per.api.job_api.delete_job	HRRIR_JOB_DEL_PRC
oracle.apps.per.api.job_api.update_job	HRRIR_JOB_UPD_PRC
oracle.apps.per.api.location.create_location	HRRIR_LOC_CRE_PRC
oracle.apps.per.api.location.delete_location	HRRIR_LOC_DEL_PRC
oracle.apps.per.api.location.update_location	HRRIR_LOC_UPD_PRC
oracle.apps.per.api.organization.create_hr_organization	HRRIR_ORG_CRE_PRC
oracle.apps.per.api.organization.create_org_information	HRRIR_ORG_CRE_PRC
oracle.apps.per.api.organization.create_organization	HRRIR_ORG_CRE_PRC
oracle.apps.per.api.organization.delete_organization	HRRIR_ORG_DEL_PRC
oracle.apps.per.api.organization.update_org_information	HRRIR_ORG_UPD_PRC
oracle.apps.per.api.organization.update_organization	HRRIR_ORG_UPD_PRC
oracle.apps.per.api.employee.create_employee	HRRIR_EMP_CRE_PRC
oracle.apps.per.api.person.update_person	HRRIR_PER_UPD_PRC
oracle.apps.per.api.assignment.create_secondary_cwk_asg	HRRIR_WF_CRE_PRC
oracle.apps.per.api.assignment.create_secondary_emp_asg	HRRIR_WF_CRE_PRC
oracle.apps.per.api.assignment.final_process_cwk_asg	HRRIR_WF_UPD_PRC
oracle.apps.per.api.assignment.final_process_emp_asg	HRRIR_WF_UPD_PRC
oracle.apps.per.api.assignment.set_new_primary_asg	HRRIR_WF_UPD_PRC
oracle.apps.per.api.assignment.set_new_primary_cwk_asg	HRRIR_WF_UPD_PRC
oracle.apps.per.api.assignment.suspend_cwk_asg	HRRIR_WF_UPD_PRC

Business Events	Workflow Process to be Mapped
oracle.apps.per.api.assignment.activate_emp_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.activate_cwk_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.activate_apl_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.accept_apl_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.actual_termination_cwk_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.actual_termination_emp_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.suspend_emp_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.update_apl_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.update_cwk_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.assignment.update_emp_asg	HRRIR_WF_UPD_PRC5
oracle.apps.per.api.ex_employee.actual_termination_emp	HRRIR_PER_UPD_PRC5
oracle.apps.per.api.ex_employee.reverse_terminate_employee	HRRIR_PER_UPD_PRC5

Oracle Business Events are delivered as seed data.

To subscribe to the basic business events in the previous table:

1. Log in to the application using *sysadmin* as your User ID and Password.
2. Select the left hand Responsibility Workflow, Administrator, Web Applications.  
In the Administrator Workflow column, select the menu named Business Events.  
The Business Events page appears.
3. Search for and open the Business Event function, as named in the previous table.

For example, enter *person\_address* and click the Go button to search, as shown in the following example:



Oracle Administrator Workflow - Business Events page

4. If the Business Event is disabled, click the Update icon to access the page where you can select the Enable option.
5. Click the Apply button.

6. Return to the Business Events page and search for and open the Business Event that you just enabled.
7. Click the Subscription button to access the Subscription page, as shown in the following example:

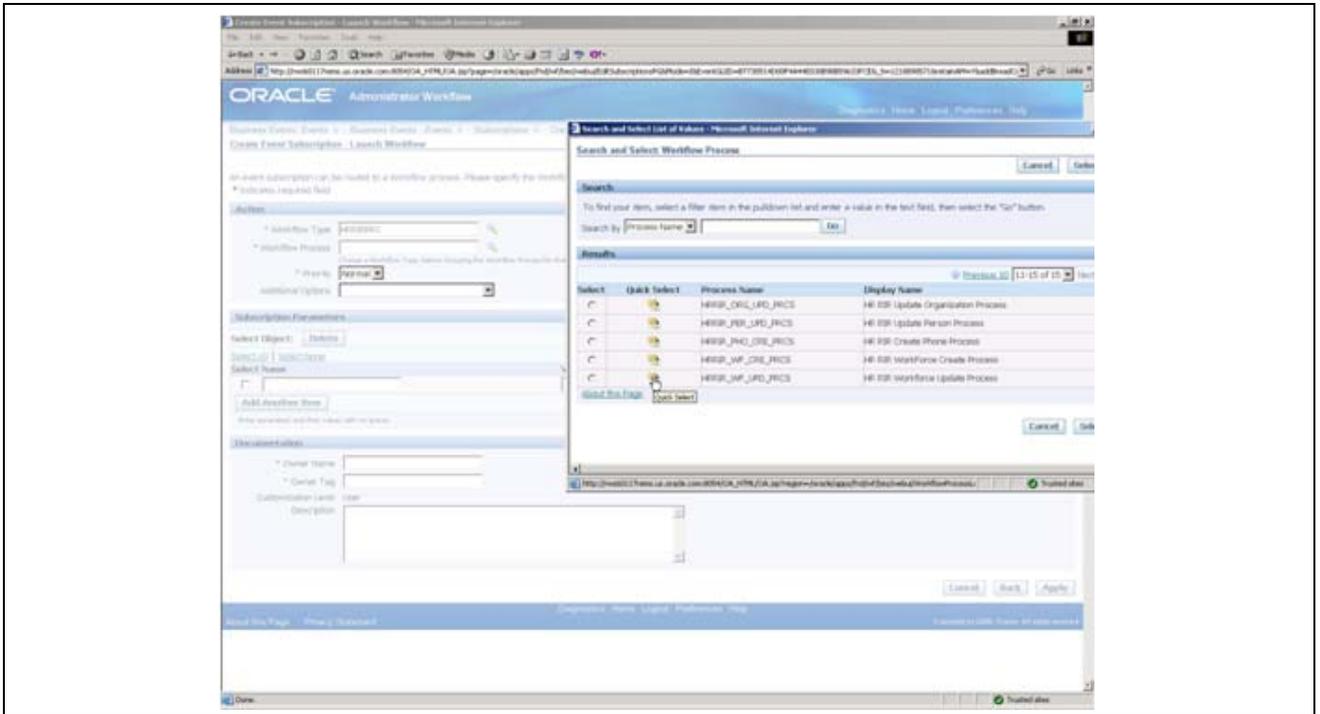
Business Events - Subscription page

8. On the Subscription page, in the System field, enter the system name.  
For example: *<instance name>.us.oracle.com*, as shown in the following example:

Select	Quick Select	System Name	Display Name	Description
<input type="radio"/>	<input type="checkbox"/>	CRMQA2R2.US.ORACLE.COM	LA5099	Local System Created by Oracle Workflow Configuration Assistant

Search and Select: System

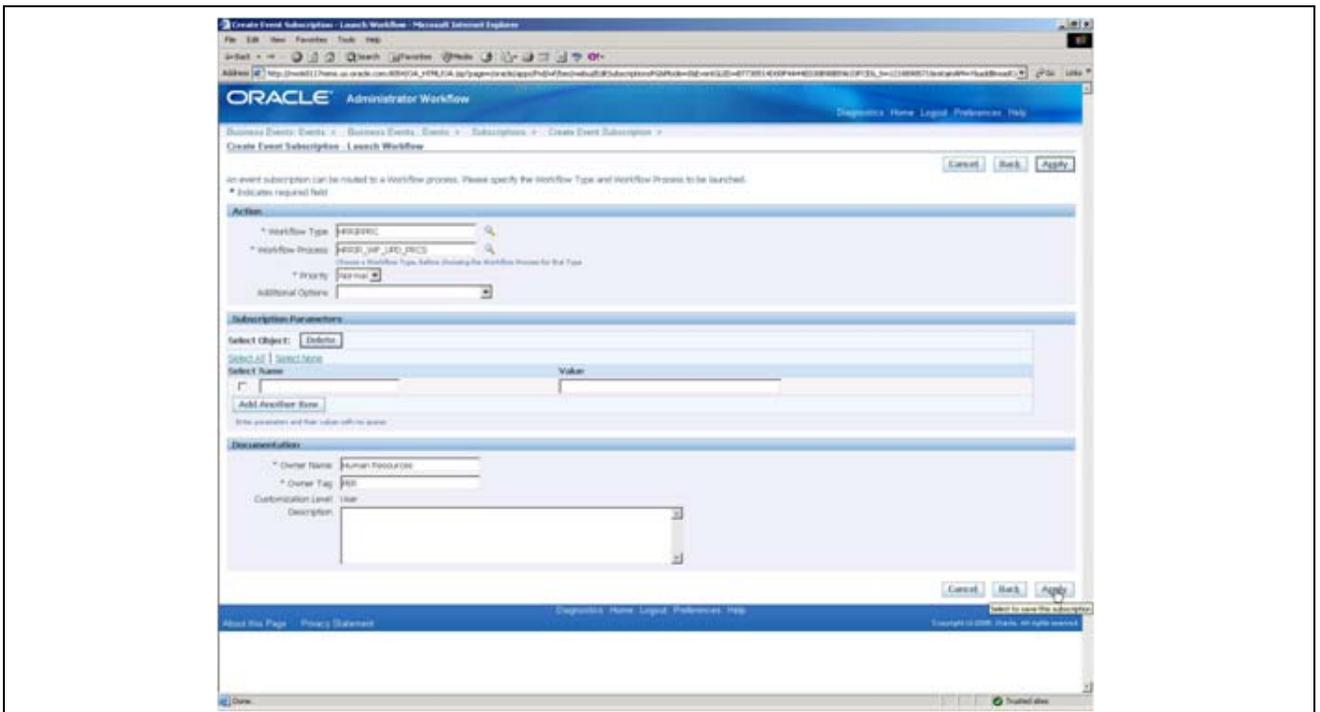
- a. To select the System Name, click the radio button to enable.
- b. Click the Select button at the lower right of the page. This returns you to the previous page.  
You can click the Help link to access the instance name.
9. Click the Next button. In the Action Type field, enter *Launch Workflow*, and press the Tab key on your keyboard.
10. In the Workflow Name field, enter *HRRIRPRC*, and then press the Tab key on your keyboard to move to the next field.
11. Click the Help link to access the Workflow Process, as shown in the following example:



Help link search results

You can refer to the delivered Business Event workflow table, at the beginning of this task, to select the corresponding process name.

12. In the Owner Name field, enter *Human Resources*.
13. In the Owner Tag field, enter *PER*.
14. Click the Apply button, as shown in the following example:



Events Subscriber - Launch Workflow page

15. Repeat the same steps (3-14) for each row defined in the Business Events table.
16. After you complete this set up and you also complete the subscription to the HRHelpdesk specific Business Events, the Regular Incremental Refresh (RIR) events will start to trigger.

---

**Note.** RIR (Regular Incremental Refresh) is a term for the process of communicating changes made inside of the Oracle EBS system. Changes are recorded and sent by way of messages to the PeopleSoft CRM system to update the data already sent from the Oracle EBS system. Oracle EBS drives all of the data changes and the PeopleSoft CRM system retains a copy for inquiry and display purposes. The RIR events are a mechanism built within Oracle EBS that is triggered when certain events occur. For example, Name change has a Business Event that generates a workflow process to send a message to the PeopleSoft system with the appropriate key information of the change. Shortly after the Oracle EBS system processes the name change, the information is recorded in the PeopleSoft system.

Refer to the previous table of Business Events to see all of the events (actions) in Oracle EBS that send messages and corresponding changes to the PeopleSoft CRM system, where the change is recorded. When a change occurs in Oracle EBS, these Business Events are triggered automatically, provided they are mapped to a workflow process (steps 3 - 14 of this task).

---

## Task 6-6: Creating New Business Events to Indicate Target URLs

Five additional Business Events and their subscriptions must be created manually. These Business Events are used to retrieve the end-point address (target URLs) to publish the message.

The following are the events that need to be created:

- oracle.apps.per.hrhd.locchange
- oracle.apps.per.hrhd.orgchange
- oracle.apps.per.hrhd.jobchange
- oracle.apps.per.hrhd.personchange
- oracle.apps.per.hrhd.asgchange

The steps involved to create these Business Events and corresponding subscriptions is similar to the previous task.

1. Select the responsibility *Workflow Administrator Web Applications*.

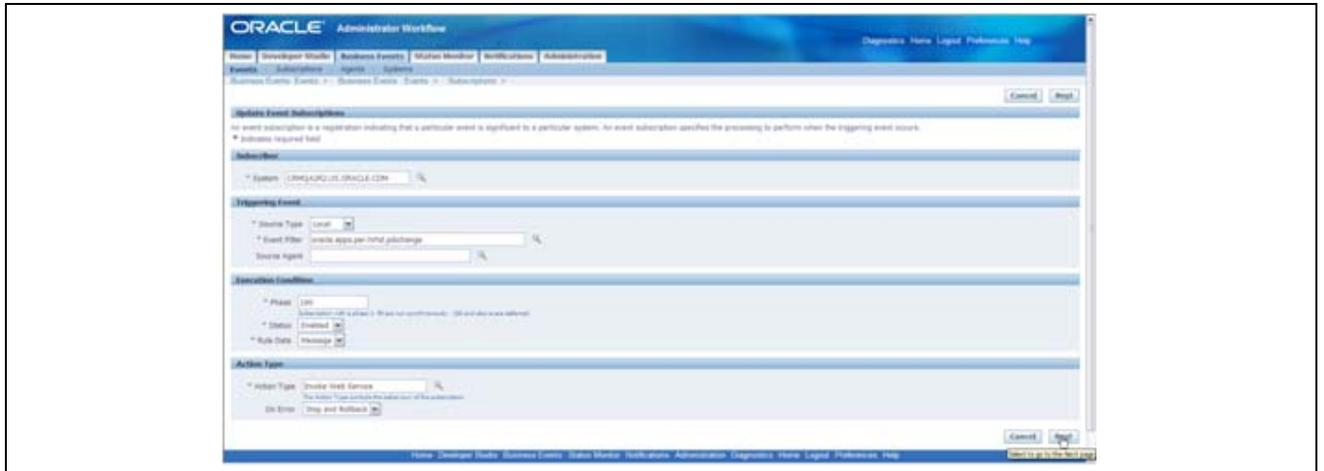
In Oracle EBS, the left hand menu (referred to as *Responsibility*, and is similar to the PeopleSoft *Role*), is selected from the first page in Oracle EBS. After you select a responsibility, the next column of menus display that directly correspond to the responsibility that you selected.

2. Navigate to the Business Events Function.
3. In the Event Filter field, enter *oracle.apps.per.hrhd.jobchange*.

Instead, in the Name field under the Search section, enter *oracle.apps.per.hrhd.jobchange* (this is one of the five new Events to be created).

Use the Business Events specified in the previous list for the respective RIR.

4. In the Action Type field, enter *Invoke Webservice*.
5. Accept the default values for the remaining fields.
6. Click the Next button to access the Business Events page, as shown in the following example:



Event Subscriptions - Business Events page

7. On the Business Events page, enter the WSDL URL value.

Refer to the earlier task *Publishing WSDLs for Service Operations for Incremental Sync* for details about how to retrieve the URLs.

8. Accept the default values for the remaining fields to complete the Wizard.

---

**Note.** Though the previous list of Business Events exist in your system, you may need to update or add subscriptions to enable them to point to the correct PeopleSoft system.

---

## Task 6-7: Setting the Encryption Key

You must run the following script in the Oracle EBS database. This sets the encryption keys and must be run before any person fullsync of incremental sync.

Run the script using the SQL Developer:

```
begin
  fnd_vault.put('HRHD', 'CRYPT_KEY',
    'AAAAACOREHRAAAAAAAAAACOREHRAAAAAAAAAACOREHRAAAAAAAAAACOOAAAAACOA');
  commit;
end;
```

## Task 6-8: Applying Patches for Incremental Sync

Apply the following patches for Incremental Sync:

- 7364056:R12.PER.B
- 7496131:R12.PER.B
- 7530917:R12.PER.B (relates to missing events)
- 7550819:R12.PER.B
- 7587316:R12.PER.B

You can also try bouncing the middle tier and Apache server of the EBS instance.

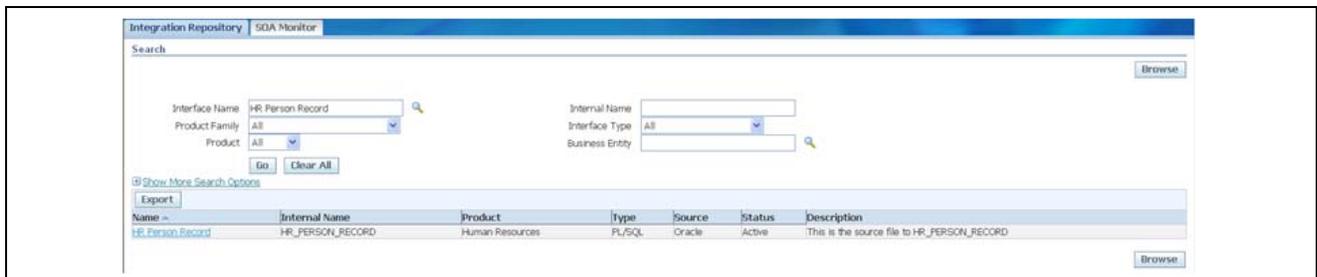
## Task 6-9: Publishing the PeopleSoft 360-Degree WSDLs

To publish the PeopleSoft 360-Degree WSDLs:

1. Log in to the system by entering *Sysadmin* in the User ID field and *sysadmin.* in the Password field.
2. Select the Responsibility *Integrated SOA Gateway*.
3. Click the Integration repository tab to access the Integration Repository page, and then click the Search button.

The Integration Repository is an integral part of Oracle E-Business Suite (EBS). This repository provides a complete catalog of Oracle EBS Business Service Interfaces. This tool enables users to easily discover and deploy the appropriate business service interface from the catalog for integration with any system or business partner.

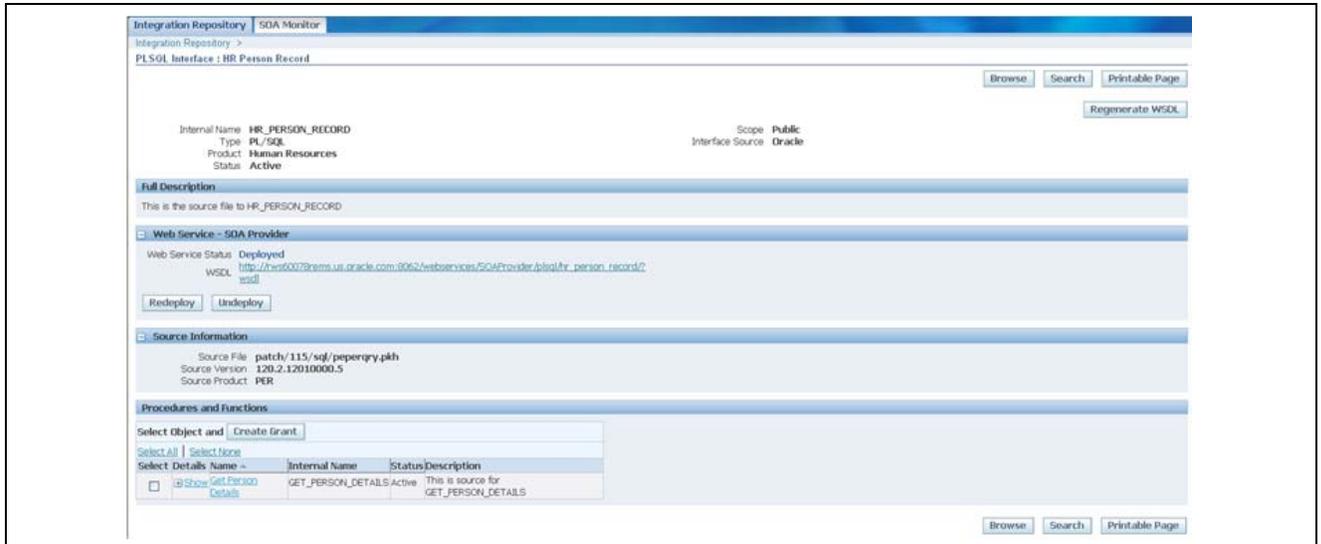
4. In the Interface Name field, enter or search for *HR Person Record*, and then click the Go button, as shown in the following example:



Integration Repository - search for HR\_Person\_Record

5. In the Name field, click the *HR Person Record* link from the search results.
6. Click the Generate WSDL button.

The Generate WSDL button is enabled for your first generation, then changes to the Regenerate WSDL button for subsequent generations, as shown in the following example:



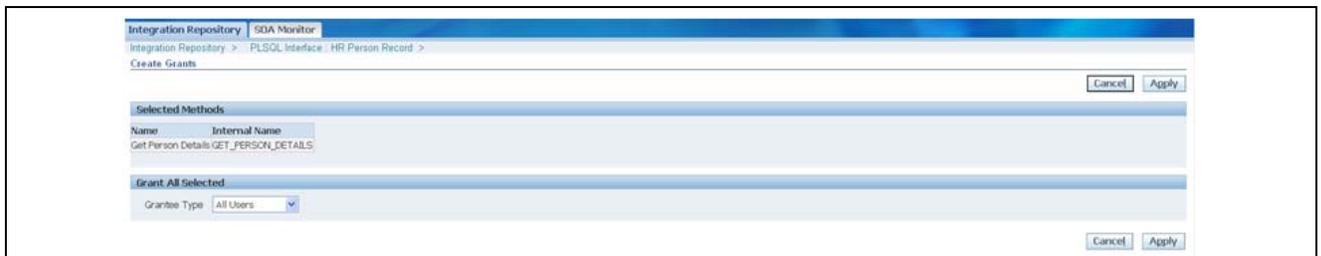
Integration Repository - PLSOL Interface: HR Person Record

7. The URL displays in the Web Service - SOA Provider section of the Integration Repository page.

8. Click the Deploy button.

The Deploy button is enabled for your first deployment, and then changes to the Redeploy button for subsequent deployments.

9. Select the row in the Procedures and Functions section and click the Create Grants button to access a new page, as shown in the following example:



PSSQL Interface: HR Person Record - Create Grants page

10. In the Grant Type field, select *All Users* from the drop-down list, and then click the Apply button.

11. Copy the WSDL (the URL that displays in the Web Service - SOA Provider section of the Integration Repository page in the earlier step).

Use this to configure the EBS\_HR node for PeopleSoft 360-Degree.

## Task 6-10: Verifying Set Up Between PeopleSoft CRM and Oracle EBS

Use this scenario as an example that describes how to verify the set up between PeopleSoft CRM and Oracle EBS.

This example is for Incremental Sync.

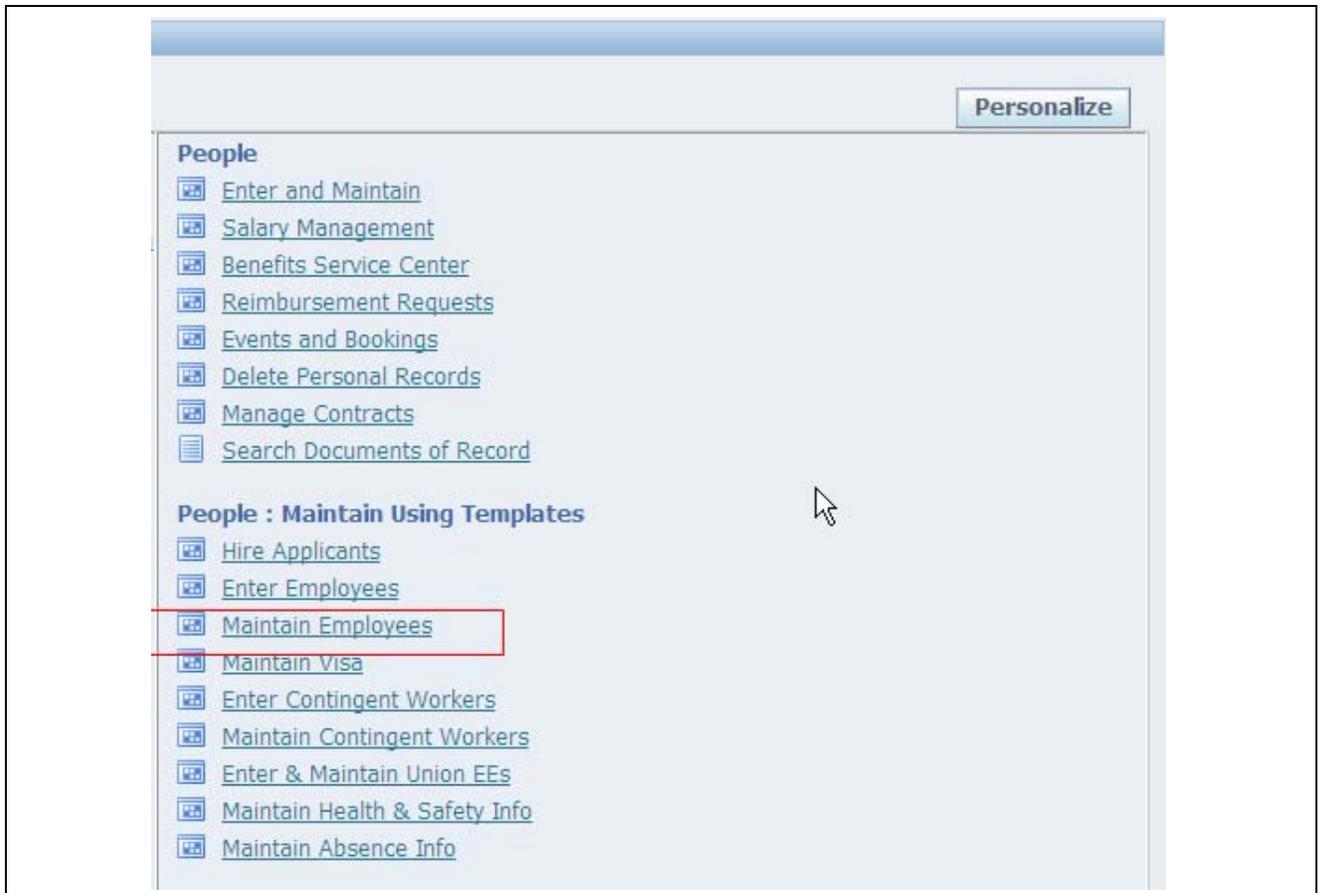
1. Log in to the Oracle EBS database by entering *hrms* in the User ID field, and *welcome* in the Password field.

2. Navigate to the first menu responsibility: US Super HRMS Manager, Vision Corporation.  
Responsibility refers to the left hand menu column, as shown in the following example:



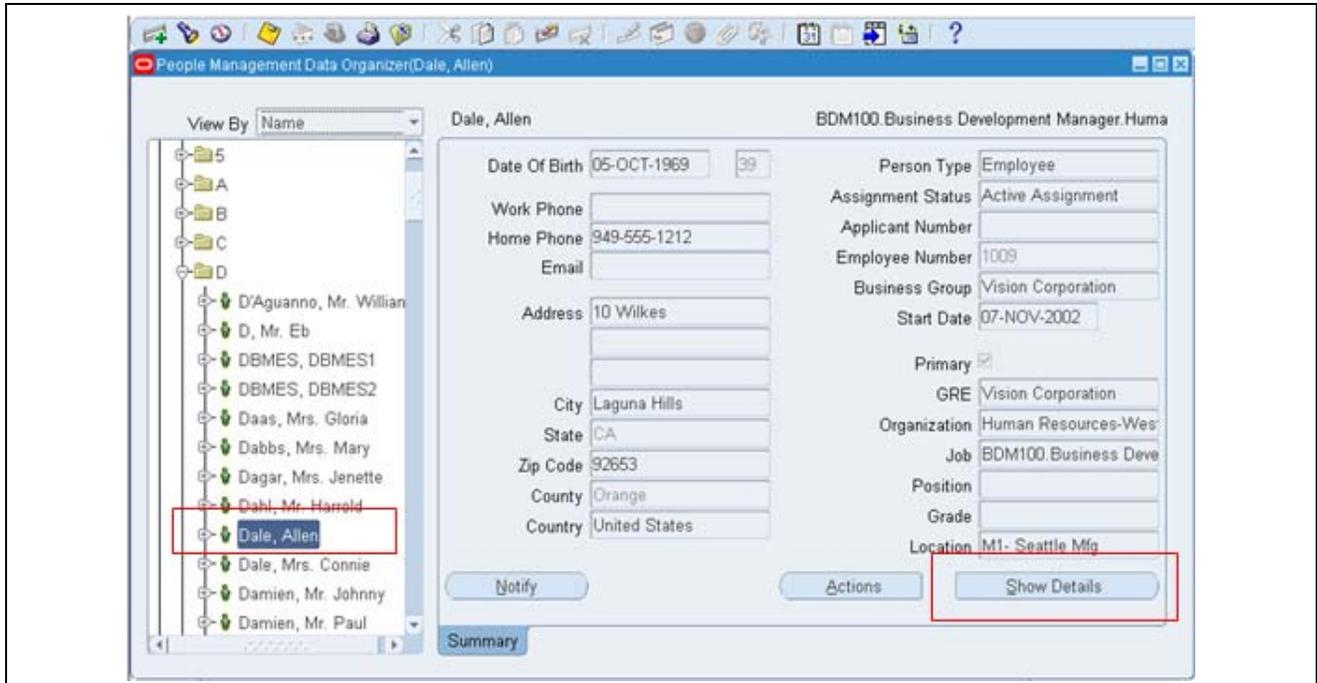
Responsibility left hand menu column

3. Navigate under People: Maintain using Templates select menu: Maintain Employees, as shown in the following example:



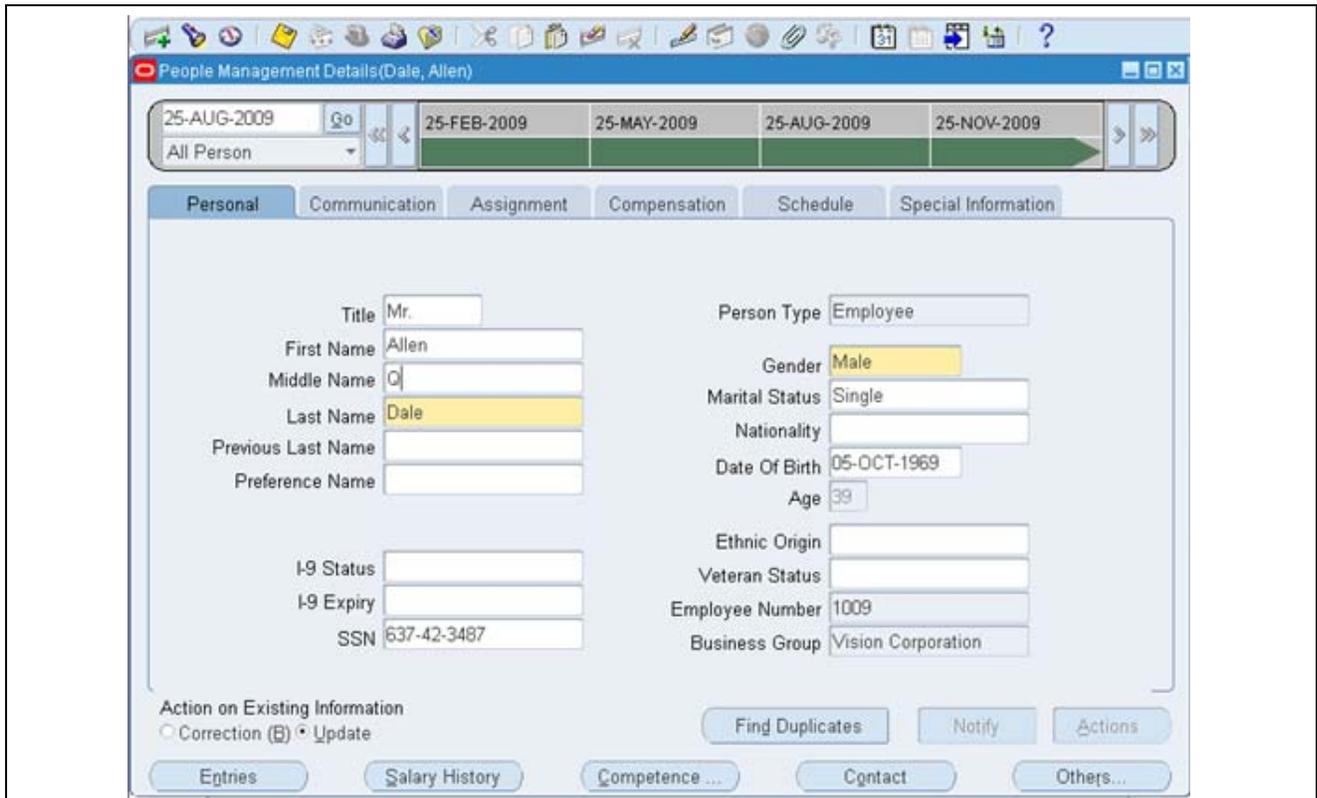
People: Maintain Using Templates: Maintain Employees

4. Open left hand navigation by People Name, open *D* and select the name Dale, Allen.
5. When the People Management Data Organizer displays, click the Show Details button, as shown in the following example:



PeopleSoft Management Data Organizer

6. In the Middle Name field, enter *Q*, and then click the Save icon on the menu bar, as shown in the following example:



PeopleSoft Management Data Organizer - Personal page

7. Navigate to the PeopleSoft CRM system that you integrated with the Oracle EBS environment.

8. Log in by entering *VPI* in the User ID field and *VPI* in the Password field.
9. Navigate the CRM menu: Workforce, Search Worker.
10. In the First Name field, enter *Allen*.
11. In the Last Name field, enter *Dale*.
12. Click the Search button.
13. When the Worker page appears, notice that the Middle Name field has a value of *Q*, as shown in the following example:

The screenshot displays the 'Worker' page for Allen Dale (Employee ID: EBS2839). The 'Person Information' section includes fields for Salutation, First Name (Allen), Last Name (Dale), Employee ID (EBS2839), Date of Birth (10/05/1969), Age (39), Middle Name (Q), Suffix, Title (Mr.), and Gender (Male). The 'Contact Info Entries' section shows a 'Home' contact type with a phone number (949/555-1212) and an address (10 Wilkes, Laguna Hills, Orange, CA 92653). The Middle Name field is highlighted with a red box.

Worker page

This confirms that the connection between the PeopleSoft CRM database and the Oracle EBS environment is valid and working properly.



## CHAPTER 7

# Integrating PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 with HRHD

This chapter discusses:

- Understanding PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 Integration
- Prerequisites
- Setting up the PeopleSoft HCM 9/9.1 Database
- Setting Up the PeopleSoft CRM 9.1 Database

---

## Understanding PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 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 9.1 database.
- Install and configure a PeopleSoft HRMS 9 or 9.1 database.

---

## Task 7-1: Setting up the PeopleSoft HCM 9/9.1 Database

This section discusses:

- Setting Up the Gateway for PeopleSoft CRM and PeopleSoft HCM

- Accessing the PeopleSoft CRM Local Node Definition
- Accessing the PeopleSoft HCM Local Node Definition
- Adding PeopleSoft CRM Trusted Node for Single Signon
- Accessing HD\_360\_REQUEST\_SYNC Service Operation
- Adding a PeopleSoft CRM Active Routing for Version 2
- Running Row Level Security in PeopleSoft HCM

## Task 7-1-1: Setting Up the Gateway for PeopleSoft CRM and PeopleSoft HCM

A gateway must be set up between the PeopleSoft CRM and PeopleSoft HCM systems. PSFT\_CR is the delivered local node on the PeopleSoft CRM system. PSFT\_HR is the delivered local node on the PeopleSoft HCM system. The gateway URL defines these two nodes in the gateway property.

To set up the gateway in both the PeopleSoft CRM and PeopleSoft HCM systems:

1. In the PeopleSoft CRM system, access the Gateways page by selecting PeopleTools, Integration Broker, Configuration, Gateways.

For example: `http://<webserver machine name><port>/PSIGW/PeopleSoftListeningConnector`

2. Search for and open the LOCAL gateway, as shown in the following example:

**Gateways**

Gateway ID: LOCAL

Local Gateway  Load Balancer

URL:

Gateway Setup Properties

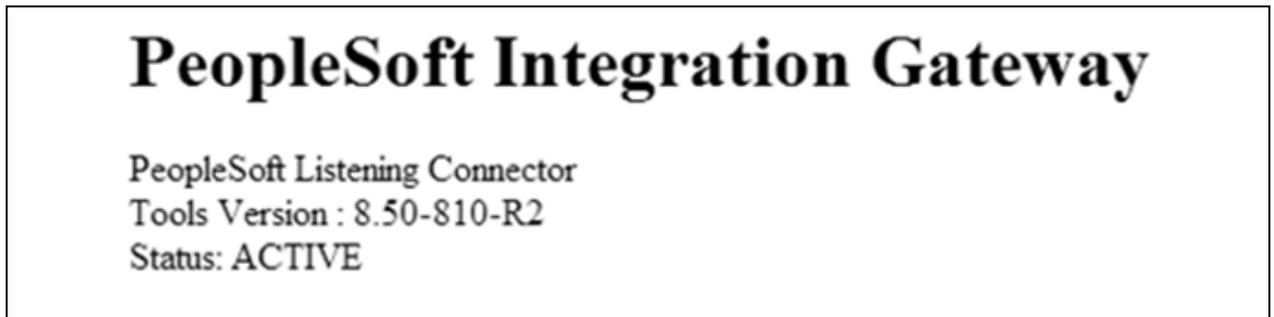
Connector ID	Description	Connector Class Name	Properties
1 AS2TARGET		AS2TargetConnector	Properties + -
2 FILEOUTPUT		SimpleFileTargetConnector	Properties + -
3 FTPTARGET		FTPTargetConnector	Properties + -
4 GETMAILTARGET		GetMailTargetConnector	Properties + -
5 HTTPTARGET		HttpTargetConnector	Properties + -
6 JMS TARGET		JMSTargetConnector	Properties + -
7 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties + -
8 PSFTTARGET		PeopleSoftTargetConnector	Properties + -
9 SMTPTARGET		SMTPTargetConnector	Properties + -

Gateways page

On the Gateways page, do the following:

- a. Click the Save button to save the page.
- b. Click the Load Gateway Connectors button. You will receive a message *"Loading process was successful."*
- c. Acknowledge the message.
- d. Click Save to save the page again.

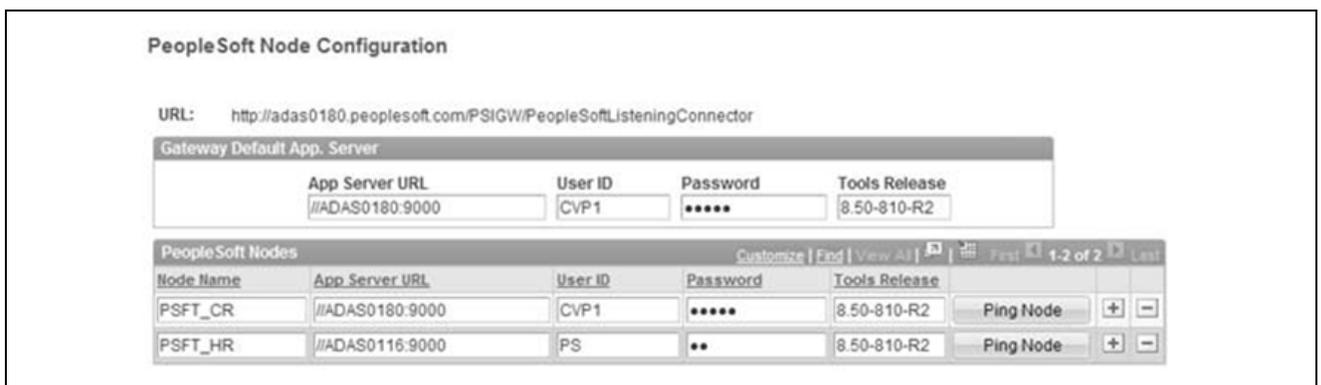
- e. Click the Ping Gateway button, to test your ping and verify that it is successful, as shown in the following example:



PeopleSoft Listening Connector

3. Click the Gateway Setup Properties link to set up local and remote nodes in the gateway.
4. Log in to the Gateway Setup Properties.

The PeopleSoft Node Configuration page appears, as shown in the following example:



PeopleSoft Node Configuration page

5. In the PeopleSoft Nodes grid, click the Add (+) button to add the local and remote node information:
  - a. In the Node Name column, enter the node name.
  - b. In the App Server URL column, enter the application server URL.
  - c. In the User ID column, enter the user ID.
  - d. In the Password column, enter the password.
  - e. In the Tools Release column, enter the PeopleSoft PeopleTools release number.
6. Click Save.
7. Click the OK button to return to the Gateway page.
8. Click Save to save the Gateway page again.
9. Repeat the same Gateway set up steps in the PeopleSoft HCM system.

## Task 7-1-2: Accessing the PeopleSoft CRM Local Node Definition

In the following examples, C910RAB is the PeopleSoft CRM 9.1 local node.

To set up the PeopleSoft HCM 9 or 9.1 Database:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the CRM local node. For example, *C910RAB*.
2. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:

The screenshot displays the 'Node Definitions' page in PeopleTools. At the top, there are navigation tabs: 'Node Definitions' (selected), 'Connectors', 'Portal', 'WS Security', and 'Routings'. The main form contains the following fields and options:

- Node Name:** C910RAB
- \*Description:** PSFT CRM - Local Node
- Node Type:** PIA
- \*Authentication Option:** Password (dropdown menu)
- Node Password:** [Masked with dots]
- \*Default User ID:** PS
- Hub Node:** [Empty]
- Master Node:** [Empty]
- Company ID:** [Empty]
- IB Throttle Threshold:** [Empty]
- Image Name:** [Empty]
- Codeset Group Name:** [Empty]

On the right side of the form, there are several checkboxes:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Buttons include 'Copy Node', 'Rename Node', 'Save', 'Contact/Notes', 'Properties', and 'Return to Search'. At the bottom, there is a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions page

3. Use this example to complete the Node Definitions page:

---

**Note.** The data you enter will differ and be specific to your system and set up.

---

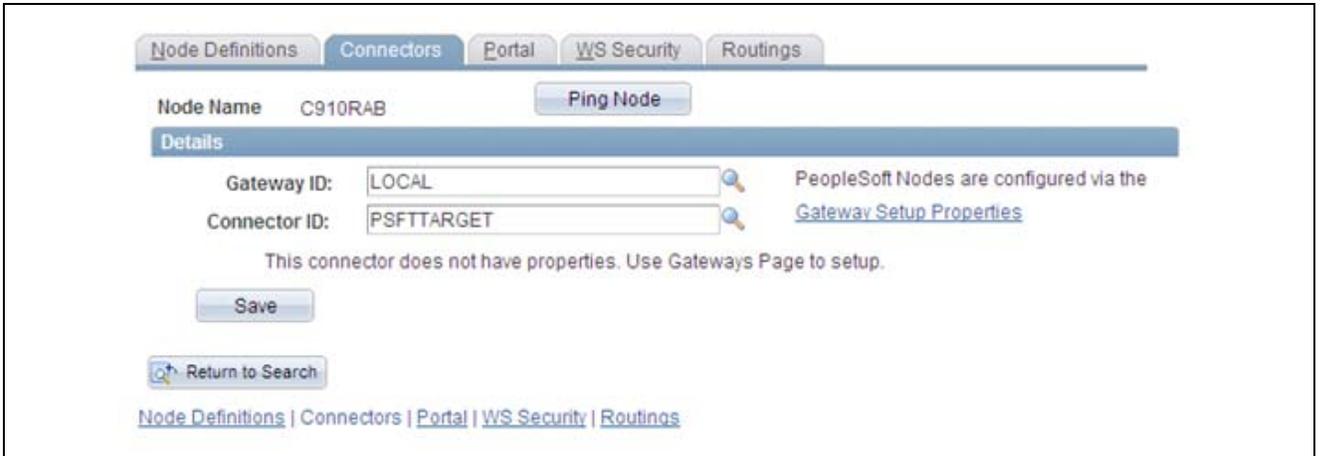
- a. In the Node Type field, select *PIA* (PeopleSoft Pure Internet Architecture) from the drop-down list.
- b. If the Node Type field is enabled for selection, select *PIA* (PeopleSoft Pure Internet Architecture).  
Otherwise, PeopleSoft Pure Internet Architecture is already your default selection.

---

**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, as shown in the following example:



Connectors page

5. Click the Gateway Setup Properties link to access the Gateway Properties page, as shown in the following example:



Gateway Properties page

6. Login using the administrator and password to verify that the gateway settings are defined as shown in the following example:

**PeopleSoft Node Configuration**

URL: <http://it-ibm29.us.oracle.com:8100/PSIGW/PeopleSoftListeningConnector>

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release
<input type="text" value="//it-ibm64:8380"/>	<input type="text" value="PS"/>	<input type="password" value="**"/>	<input type="text" value="8.50"/>

PeopleSoft Nodes

Node Name	App Server URL	User ID	Password	Tools Release	
C910RAB	//it-ibm64:8380	PS	**	8.50	<input type="button" value="Ping Node"/> <input type="button" value="+"/> <input type="button" value="-"/>

[Advanced Properties Page](#)

PeopleSoft Node Configuration page

- On the Gateway Properties page, ensure that there is a row for C910RAB and that it contains the correct URL for that database.
- Click Save.

### Task 7-1-3: Accessing the PeopleSoft HCM Local Node Definition

In the following examples, H910RAA is the PeopleSoft HCM 9 local node. The set up is the same for the PeopleSoft HCM 9 or 9.1 database.

To access the PeopleSoft HCM local node definition:

- Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the HCM local node. For example, *H910RAA*.
- Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:

The screenshot displays the 'Node Definitions' page with the following fields and options:

- Node Name:** H910RAA
- \*Description:** PS HRMS - Local Node
- Node Type:** PIA
- \*Authentication Option:** Password
- Node Password:** [Masked]
- \*Default User ID:** PS
- Hub Node:** [Empty]
- Master Node:** [Empty]
- Company ID:** [Empty]
- IB Throttle Threshold:** [Empty]
- Image Name:** [Empty]
- Codeset Group Name:** [Empty]

Options on the right side:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Buttons: Copy Node, Rename Node, Save, Contact/Notes, Properties, Return to Search.

Node Definitions page

- Use this example to complete the Node Definitions page:

---

**Note.** The data you enter will differ and be specific to your system and set up.

---

- 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, as shown in the following example:

Node Name H910RAA Ping Node

**Details**

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

Connector ID: PSFTTARGET 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, as shown in the following example:

**Gateway Properties**

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator' and the default password is 'password'.

User ID

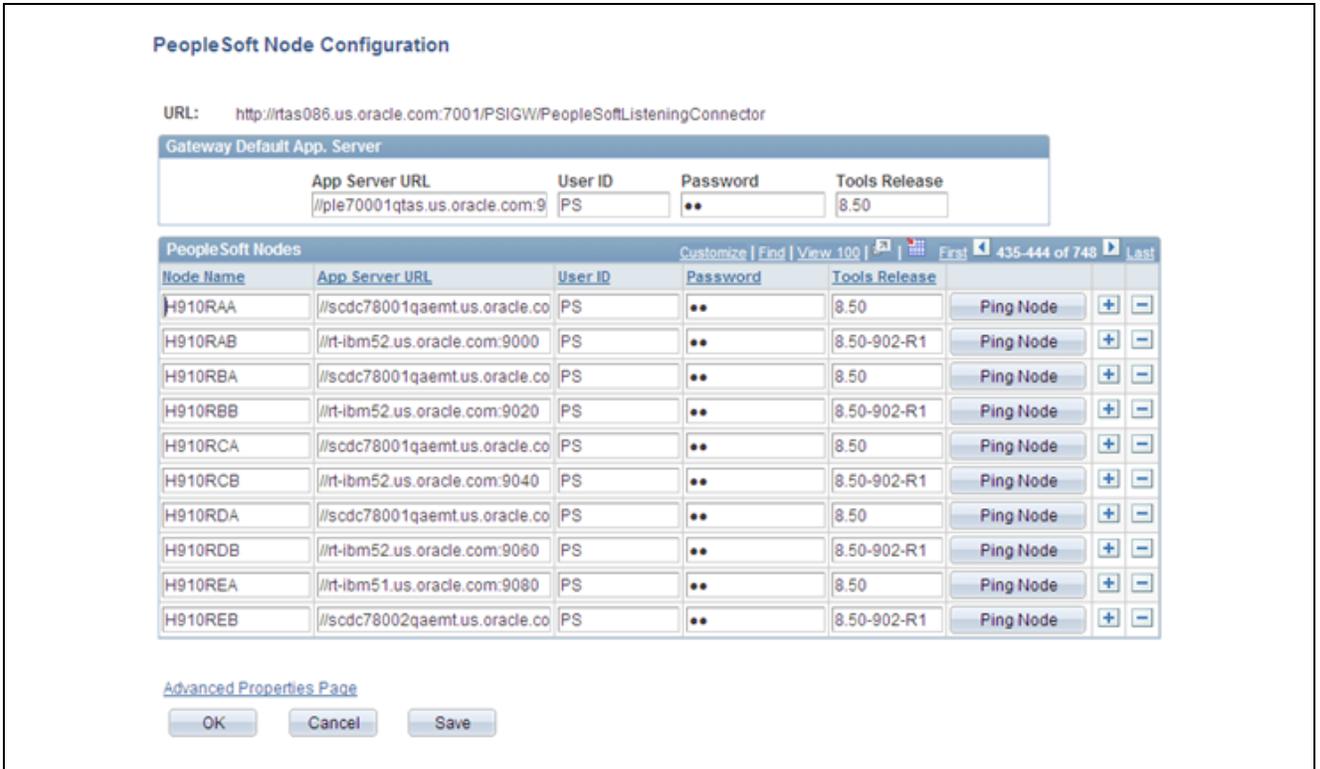
Password

Change Password

OK Cancel

Gateway Properties page

- Login and ensure that there is a row for H910RAA and that it contains the correct URL for that database, as shown in the following example:



PeopleSoft Node Configuration page

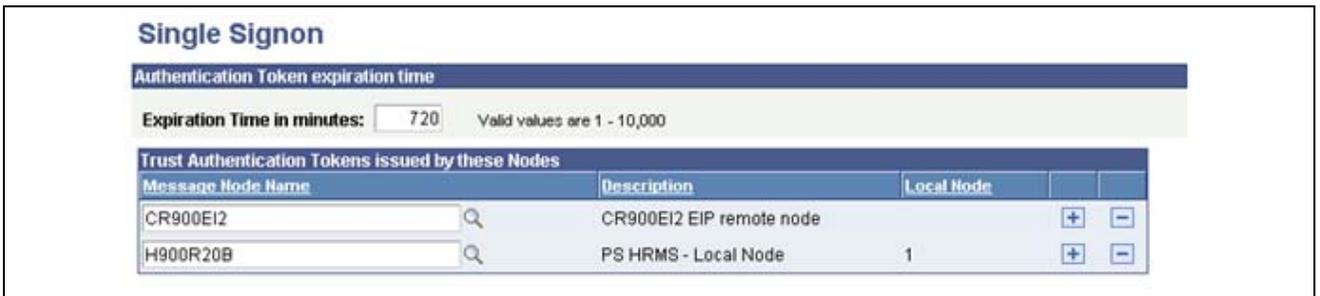
7. Click Save.

### Task 7-1-4: Adding PeopleSoft CRM Trusted Node for Single Signon

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

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

The PeopleSoft Single Signon page appears, as shown in the following example:



Single Signon page

2. Add a row for the PeopleSoft CRM local node.  
For example, *C910R20B*.
3. Click Save.

## Task 7-1-5: Accessing HD\_360\_REQUEST\_SYNC Service Operation

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

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation, and then search for service operation HD\_360\_REQUEST\_SYNC.
2. Select Service Operation to access the General Service Operation Page, as shown in the following example:

**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  
[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:** HD\_360\_REQUEST\_SYNC.VERSION\_2   
**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_2

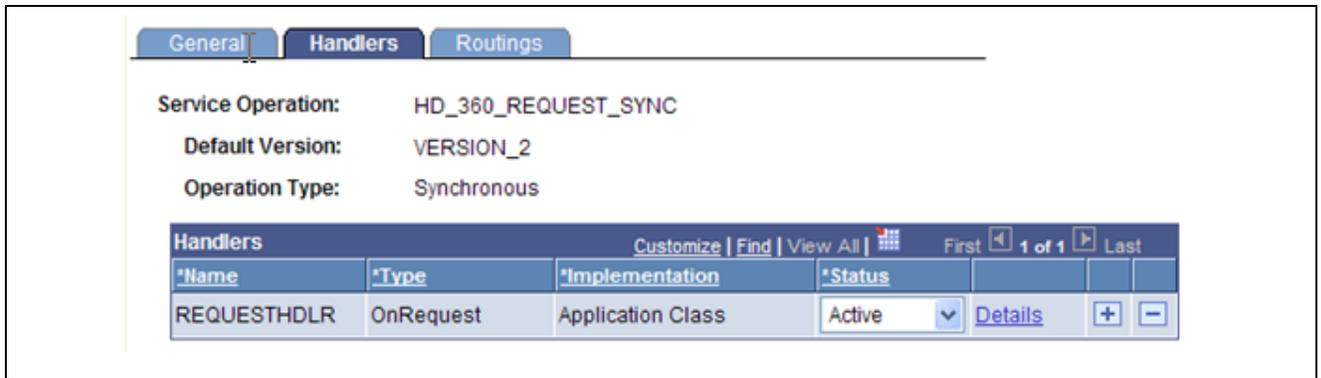
**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

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

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

Service Operations page

3. In the Default Service Operation Version section, select the Active check box.
4. Click Save.
5. From here you can select the Handlers tab to access the Handlers page, as shown in the following example:



Handlers page

6. In the Status column for the REQUESTHDLR row, select *Active* from the drop-down list.
7. Click Save.

## Task 7-1-6: 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, as shown in the following example:

The screenshot shows the 'Parameters' tab of the 'Routing Definitions' page. The fields are populated as follows:

- Routing Name:** HD360\_VERSION2
- \*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
- Object Owner ID:** 360 Degree View
- \*Log Detail:** Header and Detail

Checkboxes:  Active,  System Generated,  User Exception.

A yellow 'Save' button is located below the 'Log Detail' field.

At the bottom left, there is a navigation link: [Routing Definitions | Parameters](#)

Routing Definitions page

5. Use this example to complete the 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. Verify that the User Exception check box is selected.
  - c. In the Object Owner ID field, select *360 Degree View* from the drop-down list.
  - d. In the Log Detail field, select *Header and Detail* from the drop-down list.
  - e. Select the Active check box.
  - f. Click Save.
6. Select the Parameters tab to access the Parameters page, as shown in the following example:

Service Operation: HD\_360\_REQUEST\_SYNC  
Service Operation Version: VERSION\_2

**Parameters**

**Type:** Inbound Request  
**External Alias:** HD\_360\_REQUEST\_SYNC.VERSION\_2  
[Alias References](#)

**Message.Ver into Transform 1:**

**Transform Program 1:**

**Transform Program 2:**

**Message.Ver out of Transforms:**

---

**Type:** Outbound Response  
**External Alias:** HD\_360\_RESPONSE\_SYNC.VERSION\_2  
[Alias References](#)

**Message.Ver into Transform 1:**

**Transform Program 1:**

**Transform Program 2:**

**Message.Ver out of Transforms:**

Node Definitions - Parameters page

7. Use this example to complete the Parameters page:
  - a. For Inbound Request in the External Alias field, enter *HD\_360\_REQUEST\_SYNC.VERSION\_2*.
  - b. For Outbound Response in the External Alias field, enter *HD\_360\_RESPONSE\_SYNC.VERSION\_2*.
  - c. Click Save.

**Note.** There are no transformations because the PeopleSoft CRM database is sending 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*.

*If you are on PeopleSoft PeopleTools 8.50, the Routings tab will also show a User Exception check box. Ensure that you select this check box.*

## Task 7-1-7: Running Row Level Security in PeopleSoft HCM

To run the row level security process in the PeopleSoft HCM database:

1. Select Home, Setup HRMS, Security, Core Row Level Security, and then Refresh SJT\_OPR\_CLS.
2. Select any existing Run Control ID, or create a new one.
3. 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 7-2: Setting Up the PeopleSoft CRM 9.1 Database

This section discusses:

- Accessing the PeopleSoft CRM Local Node Definition
- Accessing the PeopleSoft HCM Local Node Definition
- Adding PeopleSoft HCM Trusted Node for PeopleSoft Single Signon
- Activating Service Operations
- Adding a PeopleSoft HCM Active Routing for Version 2

### Task 7-2-1: 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, CR900E12).
2. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:

The screenshot shows the 'Node Definitions' page in PeopleSoft. The page has several tabs: 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Node Definitions' tab is active. The page displays the following fields and options:

- Node Name:** CR900E12
- \*Description:** PSFT CRM - Local Node
- Node Type:** PIA
- \*Authentication Option:** Password (dropdown menu)
- Password:** [Redacted with dots]
- \*Default User ID:** VP1
- Hub Node:** [Empty field]
- Master Node:** [Empty field]
- Company ID:** [Empty field]
- IB Throttle Threshold:** [Empty field]
- Image Name:** [Empty field]
- Code Set Group Name:** [Empty field]

On the right side, there are several checkboxes:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

At the bottom of the page, there are two buttons: 'Save' and 'Return to Search'. There are also links for 'Contact/Notes' and 'Properties'.

Node Definitions page

3. Use this example to complete the Node Definitions page:

**Note.** The data you enter will differ and be specific to your system and set up.

- 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 Save.
4. Select the Connectors tab to access the Connectors page, as shown in the following example:

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 Save.

## Task 7-2-2: 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, as shown in the following example:

Node Definitions page

3. Use this example to complete the Node Definitions page:

---

**Note.** The data you enter will differ and be specific to your system and set up.

---

- 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 Save.
4. Select the Connectors tab to access the Connectors page, as shown in the following example:



Connectors page

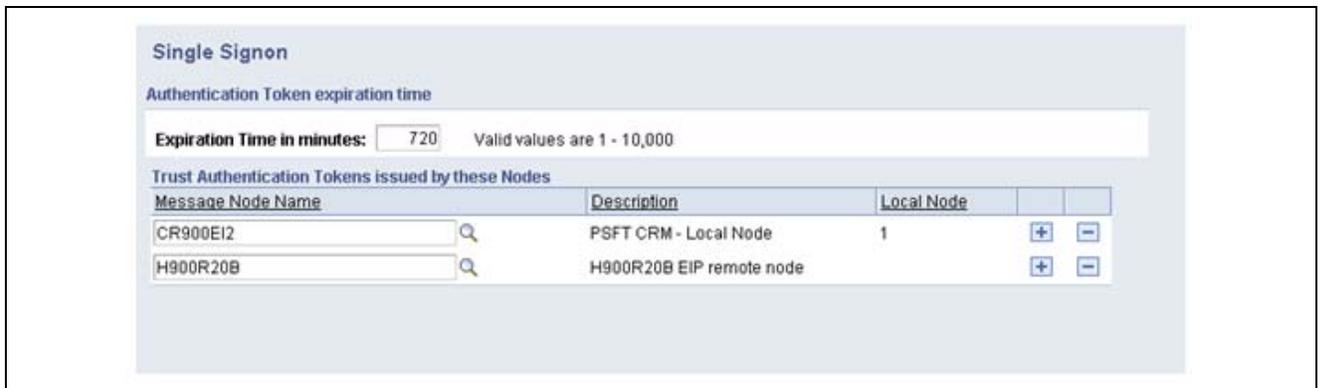
5. In the Connector ID field, verify that *PSFTTARGET* is selected.
6. Click the Gateway Setup Properties link to access and set up the Gateway Properties as necessary.
7. Click Save.

### Task 7-2-3: Adding PeopleSoft HCM Trusted Node for PeopleSoft Single Signon

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

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

The PeopleSoft Single Signon page appears, as shown in the following example:



Single Signon page

2. Add a row for the PeopleSoft HCM local node.  
For example, *H900R20B*.
3. Click Save.

### Task 7-2-4: Activating Service Operations

To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation, and then search for service operation HD\_360\_REQUEST\_SYNC.
2. Select the General tab to access the General page, as shown in the following example:

ORACLE

Home | Worklist | V

Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations

General | Handlers | **Routings**

Service Operation: HD\_360\_REQUEST\_SYNC  
 Operation Type: Synchronous  
 \*Operation Description: HR Helpdesk Message  
 Operation Comments:  
 UserPassword Required  
 \*Security Verification: None

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](#)

**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  
 Transactional

**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**

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

[Return to Search](#)

Service Operations - General page

3. In the Default Service Operation Version section, verify that the Active check box is selected.
4. Click Save.

## Task 7-2-5: 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, as shown in the following example:

The screenshot displays the Oracle PeopleTools interface for defining a routing. The breadcrumb trail is: Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Routings. The active tab is 'Routing Definitions'. The form fields are as follows:

- Routing Name:** HD360\_VERSION2
- \*Service Operation:** HD\_360\_REQUEST\_SYNC
- Version:** VERSION\_2
- \*Description:** HD360\_VERSION2
- Comments:** (Empty text area)
- \*Sender Node:** PSFT\_CR
- \*Receiver Node:** H900P24
- Operation Type:** Synchronous
- Object Owner ID:** 360 Degree View
- \*Log Detail:** Header and Detail
- Active:**
- System Generated:**
- User Exception:**

At the bottom, there are navigation links: Routing Definitions | Parameters | Connector Properties | Routing Properties. A 'Save' button is located below the 'Log Detail' field.

Routing Definitions page

5. Use this example to complete the Routing Definitions page:

---

**Note.**

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

---

**Note.** For new routings, you must enter or select the information for all fields, as in this example.

For existing routings, the Sender Node populates as the CRM local node (CR900E12), and the Receiver Node populates as the HCM local node (H900R20B).

- b. In the Service Operation field, enter or select the service operation. For example, HD360\_REQUEST\_SYNC.
- When you enter or select a service operation, the Version field automatically populates. For example, VERSION\_2.
- c. In the Description field, enter a description. For example, HD360\_VERSION2.
- d. In the Sender Node field, enter or select the sender node. For example, PSFT\_CR.
- e. In the Receiver Node field, enter or select a receiver node. For example, H900P24.
- f. In the Routing Type field, enter or select a routing type. For example, Synchronous.
- g. When you enter or select a routing type, the User Exception check box appears. Verify that the User Exception check box is selected.
- h. In the Object Owner ID field, select *360 Degree View* from the drop-down list.
- i. In the Log Detail field, select *Header and Detail* from the drop-down list.

- j. Select the Active check box.
  - k. Click Save.
6. Select the Parameters tab to access the Parameters page, as shown in the following example:

The screenshot displays the Oracle PeopleTools interface for the Integration Broker. The breadcrumb trail is: Favorites | Main Menu > PeopleTools > Integration Broker > Integration Setup > Routings. The routing details are as follows:

- Routing Name: HD360\_VERSION
- Service Operation: HD\_360\_REQUEST\_SYNC
- Service Operation Version: VERSION\_2
- Sender Node: PSFT\_CR
- Receiver Node: H900P24

The 'Parameters' section is expanded, showing the following fields:

- Type: Outbound Request
- External Alias: HD\_360\_REQUEST\_SYNC.VERSION\_2
- Message.Ver into Transform 1: (empty field)
- Transform Program 1: (empty field)
- Transform Program 2: (empty field)

There is a link for 'Alias References' below the External Alias field.

Node Definitions - Parameters page

7. Use this example to complete the Parameters page:
  - a. For Inbound Request in the External Alias field, enter *HD\_360\_REQUEST\_SYNC.VERSION\_2*
  - b. For Outbound Response in the External Alias field, enter *HD\_360\_RESPONSE\_SYNC.VERSION\_2*
  - c. Click Save.

---

**Note.** There are no transformations because the PeopleSoft CRM database is sending 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 9.1 integration setup with PeopleSoft HCM 9 or 9.1.

## CHAPTER 8

# Integrating PeopleSoft HRMS 8.9 with HRHD

This chapter discusses:

- Understanding Integrating PeopleSoft HRMS and HRHD
- Prerequisites
- Setting Up the URL Gateway for PeopleSoft CRM and HRMS
- Setting Up PeopleSoft CRM and HRMS Connector IDs
- Setting Up PeopleSoft Single Signon
- Pinging the PeopleSoft CRM and HRMS Nodes
- Activating the Message Channel or Queue
- Activating the HR\_HELPDESK\_360 EIP Messages
- Activating PeopleSoft HRMS 89 PSFT\_CR Transactions
- Activating PeopleSoft CRM 91 and HRMS 89 Service Operations for PeopleSoft PeopleTools 8.48 and Above
- Setting Up Portal Content Links
- Activating Link Category for PeopleSoft HRMS 8.9

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## Understanding Integrating PeopleSoft HRMS and HRHD

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.

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**Note.** Before proceeding with your installation, consult My Oracle Support, 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 9.1 Product-to-PeopleBook Index found on My Oracle Support, 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 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 9.1 database.
2. Install and configure a PeopleSoft HRMS 8.9 database.

---

## Task 8-1: Setting Up the URL Gateway for PeopleSoft CRM and HRMS

This section discusses:

- Understanding the URL Gateway Setup for PeopleSoft CRM and HRMS
- Setting Up the PeopleSoft CRM Gateway
- Setting up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools Prior to 8.48
- Setting up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools 8.48 and Above

### Understanding the URL Gateway Setup for PeopleSoft CRM and HRMS

A URL gateway must be set up in the PeopleSoft CRM and PeopleSoft HRMS systems. In addition, PSFT\_CR is delivered as a local node on PeopleSoft CRM, and PSFT\_HR is delivered 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 8.50 PeopleBook: Integration Broker*, "Managing Integration Gateways."

---

**Note.** PeopleSoft CRM is on PeopleSoft PeopleTools release 8.50. PeopleSoft HCM was originally available on PeopleSoft PeopleTools release 8.46 (PeopleSoft HRMS 8.9). You may have applied a later PeopleSoft PeopleTools version on your HRMS system. Some of the instructions in this chapter only apply to certain PeopleSoft PeopleTools versions. Please review the instructions in each task carefully to verify whether they apply to your configuration.

---

### Task 8-1-1: Setting Up the PeopleSoft CRM Gateway

For PeopleSoft CRM on PeopleSoft PeopleTools release 8.50, Oracle uses the Integration Broker to specify the gateway URL.

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, as shown in the following example:

The screenshot shows the 'Gateways' configuration page in PeopleSoft. The 'Gateway ID' is 'LOCAL'. The 'Local Gateway' checkbox is checked, and the 'Load Balancer' checkbox is unchecked. The 'URL' field contains 'http://adas0102.peoplesoft.com/PSIGW/PeopleSoftListeningConnector'. Below the URL field is a 'Ping Gateway' button. The 'Gateway Setup Properties' section includes a 'Load Gateway Connectors' button. A table titled 'Connectors' displays a list of connectors with columns for '\*Connector ID', 'Description', and '\*Connector Class Name'. Each row includes a 'Properties' link and '+' and '-' icons. At the bottom of the page are 'Save' and 'Return to Search' buttons.

*Connector ID	Description	*Connector Class Name	Properties	+	-
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.`

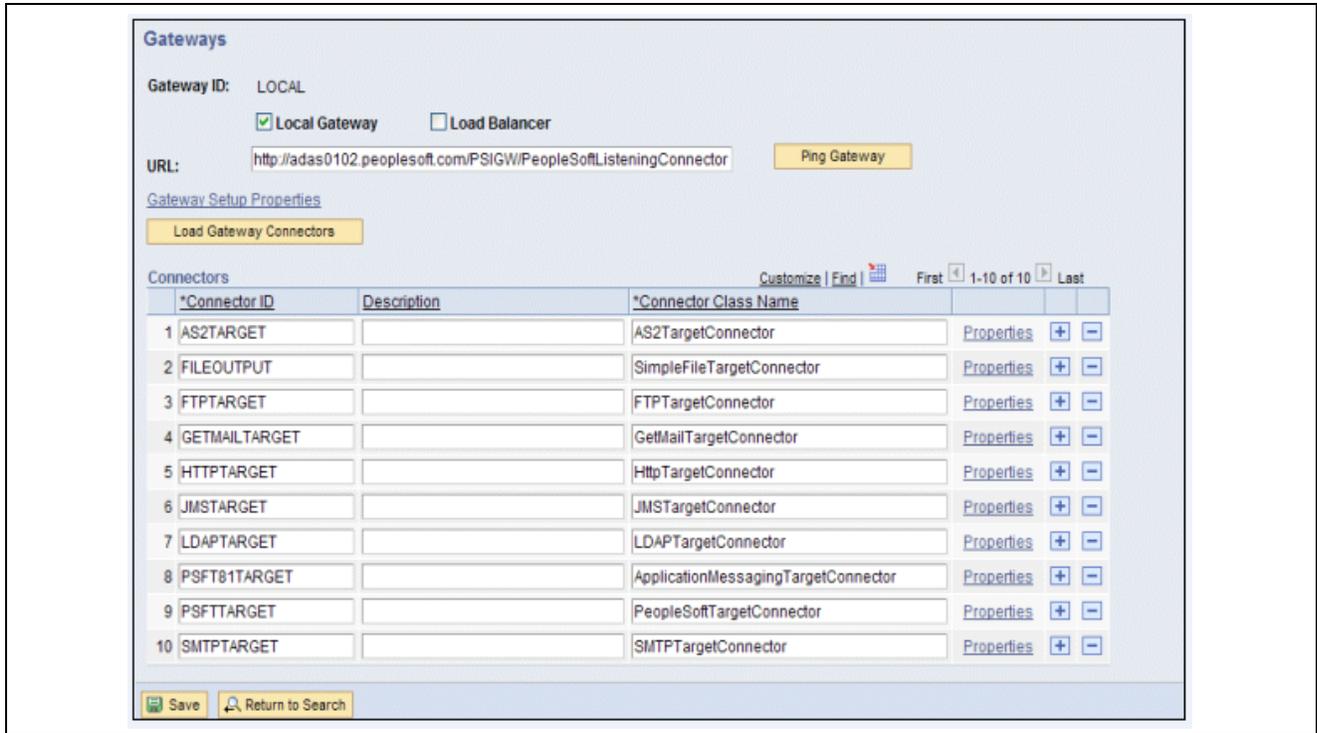
The value that you enter for <webserver\_machine\_name><port> depends on the machine you set up to access the integration gateway. The <port> value should be an HTTP port.

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 *Loading process was successful.*

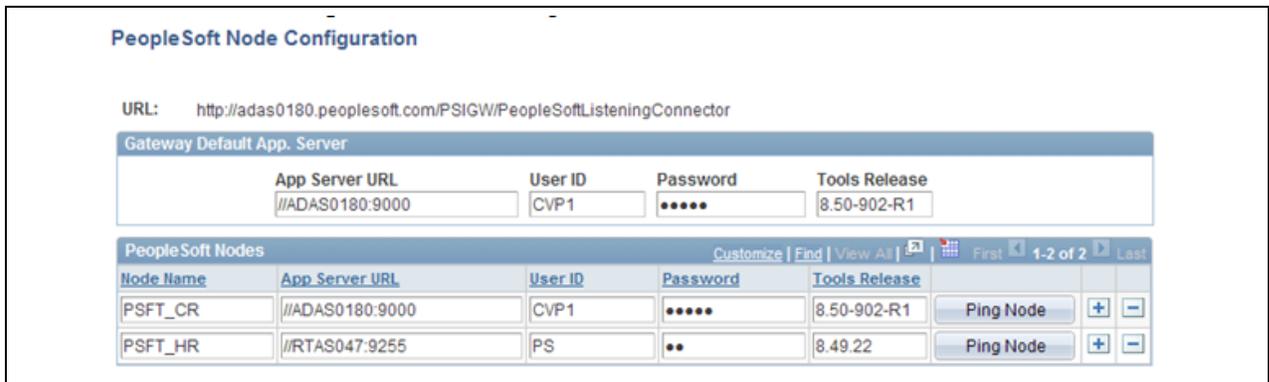
6. Click OK.
7. Click Save.

The information on the Gateways page should be similar to what is shown in the following example:



Example of Gateways page

8. After the gateway loads, do the following:
  - a. Click the Gateway Setup Properties link to access the Gateway Property page, as shown in the following example:



PeopleSoft Node Configuration page

- b. Specify both the PeopleSoft CRM and the PeopleSoft HRMS node information, and then click Save. Ensure that the Gateway Default Application Server information is the same as the local node PSFT\_CR.

## Task 8-1-2: Setting up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools Prior to 8.48

The following table provides the location of the gateway property file for various configurations. This is only applicable to PeopleSoft HRMS on PeopleSoft PeopleTools versions below 8.48. If your PeopleSoft HRMS system is running on PeopleSoft PeopleTools 8.48 or above, the property file modification is not required.

PeopleSoft Enterprise Product Application	Application Server	Gateway URL Directory
HRMS 8.9 on PeopleTools releases prior to 8.47	Oracle WebLogic Server	C:\bea\wlserver61\config\PeopleSoft\Applications\PSIGW\Web-Inf\IntegrationGateway.Properties
HRMS 8.9 on PeopleTools 8.47	Oracle WebLogic Server	<%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties
HRMS 8.9	IBM WebSphere	C:\WebSphere\AppServer\installedApps\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties

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 8.9 on the Oracle WebLogic Server, the command is located on the Oracle 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 8.9 with IBM WebSphere, the location of the command is:

C:\webspere\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 its PeopleSoft PeopleTools release. Ensure that you have the correct release.

## Task 8-1-3: Setting Up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools 8.48 and Above

For PeopleSoft HRMS 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.

**Note.** For HRMS on PeopleSoft PeopleTools 8.48, the gateway of PeopleTools 8.48 cannot talk directly to the CRM gateway of PeopleTools 8.50. Instead of using the Local gateway, define a remote gateway, which is on PeopleTools 8.49 gateway and above, and use this remote gateway for the remote CRM node on the HRMS system.

To set up the gateway in the PeopleSoft HRMS system with PeopleSoft PeopleTools release 8.48 or 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, as shown in the following example:

The screenshot shows the 'Gateways' configuration page in PeopleSoft. The 'Gateway ID' is set to 'LOCAL'. There are checkboxes for 'Local Gateway' (checked) and 'Load Balancer'. The 'URL' field contains 'http://adas0102.peoplesoft.com/PSIGW/PeopleSoftListeningConnector'. Below the URL, there is a 'Ping Gateway' button. The 'Gateway Setup Properties' section has a 'Load Gateway Connectors' button. A table of connectors is displayed with the following columns: \*Connector ID, Description, \*Connector Class Name, and Properties. The table lists 10 connectors:

*Connector ID	Description	*Connector Class Name	Properties
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 + -

At the bottom of the page, there are 'Save' and 'Return to Search' buttons.

Gateways page

3. Enter the Gateway URL on the Gateways page:  
[http://<webserver\\_machine\\_name><port>/PSIGW/PeopleSoftListeningConnector](http://<webserver_machine_name><port>/PSIGW/PeopleSoftListeningConnector).

The value that you enter for <webserver\_machine\_name><port> depends on the machine you set up. 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.
8. After the gateway loads, do the following:
  - a. Click the Gateway Setup Properties link to access the Gateway Property page.
  - b. Specify both the PeopleSoft CRM and the PeopleSoft HRMS node information, and then click Save.  
Ensure that the Gateway Default Application Server information is the same as the local node PSFT\_HR.

### See Also

*PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Integration Gateways"*

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## Task 8-2: Setting Up PeopleSoft CRM and HRMS Connector IDs

This section discusses:

- Defining Connector ID for Nodes in the PeopleSoft CRM System
- Defining Connector ID for Nodes in the PeopleSoft HRMS System

### Task 8-2-1: Defining Connector ID for 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, as shown in the following example:

The screenshot shows the 'Connectors' tab in the 'Node Definitions' component. The 'Node Name' is 'PSFT\_CR'. The 'Gateway ID' is 'LOCAL' and the 'Connector ID' is 'PSFTTARGET'. A message indicates that the connector does not have properties and to use the Gateways Page to setup. The 'Save' button is visible at the bottom.

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), as shown in the following example:

The screenshot shows the 'Connectors' tab in the 'Node Definitions' component for node 'PSFT\_HR'. The 'Gateway ID' is 'LOCAL' and the 'Connector ID' is 'PSFTTARGET'. A message indicates that the connector does not have properties and to use the Gateways Page to setup. The 'Save' button is visible at the bottom.

Node Definitions - Connectors page

## Task 8-2-2: Defining Connector ID for 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, Nodes in the PeopleSoft HRMS system.
3. Specify the PSFT\_CR node (remote node).
4. In the Node Definitions component, select the Connectors tab.

**Note.** If the PeopleSoft HRMS system is on PeopleSoft PeopleTools 8.48, and a remote gateway is defined for integrating with CRM on PeopleSoft PeopleTools 8.50, then for the remote node PSFT\_CR, use the remote gateway ID.

In the example that follows, the Gateway has been defined as *898B*.

Otherwise, use the Local Gateway.

The screenshot shows the 'Connectors' tab in the Node Definitions page for node PSFT\_CR. The 'Gateway ID' field contains '898B' and the 'Connector ID' field contains 'PSFTTARGET'. A 'Ping Node' button is visible. A message at the bottom of the details section reads: 'This connector does not have properties. Use Gateways Page to setup.' There are 'Save' and 'Return to Search' buttons at the bottom.

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 HRMS system.
3. Specify the PSFT\_HR node (local node).
4. In the Node Definitions component, select the Connectors tab, as shown in the following example:

The screenshot shows the 'Connectors' tab in the Node Definitions page for node PSFT\_HR. The 'Gateway ID' field contains 'LOCAL' and the 'Connector ID' field contains 'PSFTTARGET'. A 'Ping Node' button is visible. A message at the bottom of the details section reads: 'This connector does not have properties. Use Gateways Page to setup.' There are 'Save' and 'Return to Search' buttons at the bottom.

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.

---

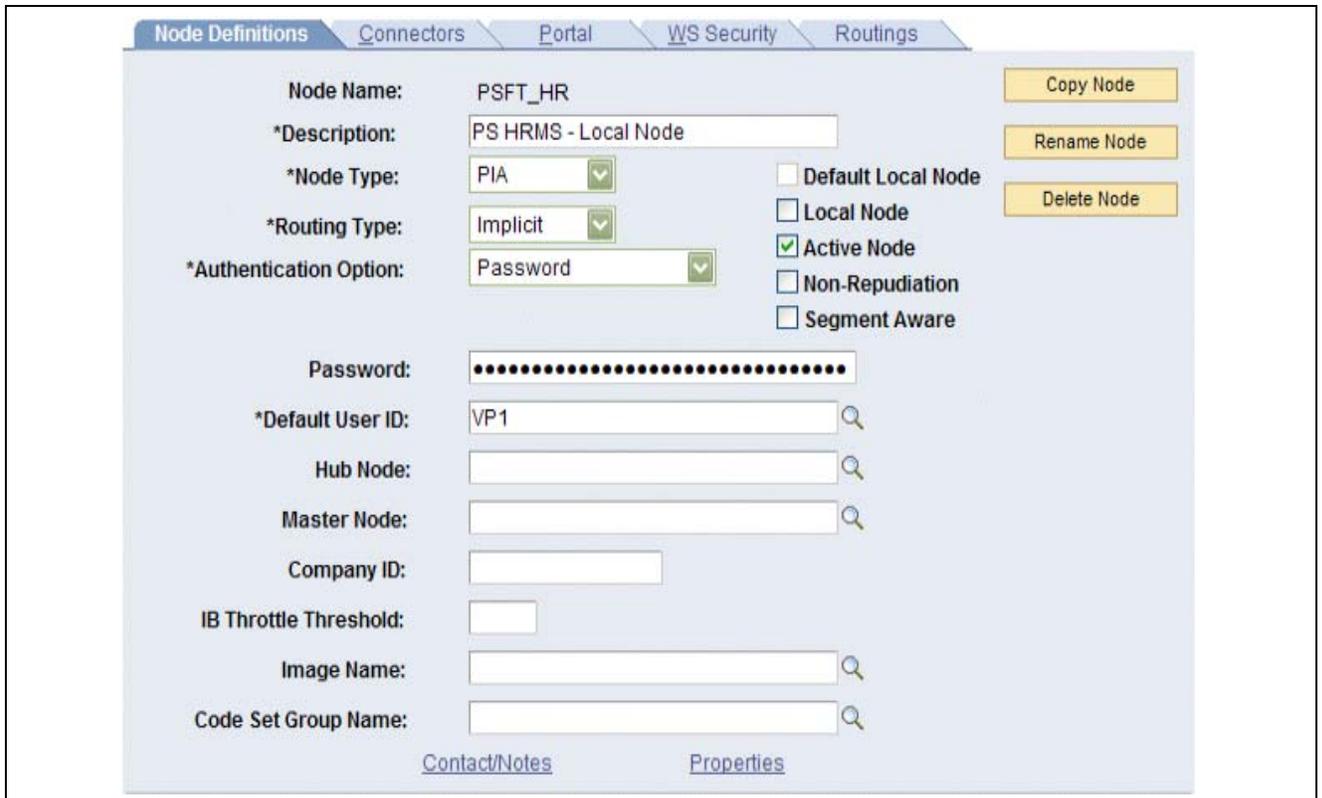
## Task 8-3: Setting Up PeopleSoft Single Signon

Set up your integration machines to support single signon, so that users do not need to sign on to PeopleSoft HRMS manually when they are 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, Nodes 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.
  - b. Press the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.
  - c. 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.
  - d. Press the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.
5. Click Save.

The following is an example of the Node Definitions page showing the specified values:



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, add 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 7 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

The following table provides the location of the Configuration.Properties files:

PeopleSoft Enterprise Application	Web Server	Directory
HRMS on PeopleTools releases prior to 8.47	Oracle WebLogic Server, 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	Oracle WebLogic Server, releases post 6.1	<%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
HRMS on PeopleTools 8.47 and later	Oracle WebLogic Server, release post 6.1	<%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
CRM	Oracle WebLogic Server, releases post 6.1	<%PS_HOME%>\webserv\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%>\webserv\ <cellname_nodename_servername&gt;\&lt;domain.ear&gt;\portal\web-inf\psftdocs\ps< td=""> </cellname_nodename_servername&gt;\&lt;domain.ear&gt;\portal\web-inf\psftdocs\ps<>

If you are using Oracle 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>\webserv\<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. For PeopleSoft PeopleTools release 8.48 and above, set up single signon in both the CRM and HRMS systems.
  - a. Select PeopleTools, Security, Security Objects, Single Signon.
  - b. Add both *PSFT\_HR* and *PSFT\_CR* as trusted nodes in the grid, as shown in the following example:.

**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		
PSFT_CR	PSFT CRM - Local Node	1	+	-
PSFT_HR	PS HRMS - Local Node		+	-

Single Signon page

- c. Perform this on both the CRM and HRMS systems.
9. Reboot the PeopleSoft CRM and PeopleSoft HRMS web servers.

## Task 8-4: Pinging the PeopleSoft CRM and 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 and above, select PeopleTools, Integration Broker, Integration Setup, Nodes. If you are using a PeopleSoft PeopleTools release prior to 8.48, select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
2. For PeopleSoft PeopleTools prior to 8.48, select the Node Status tab. On the Node Status page, search and select the node name PSFT\_HR or PSFT\_CR.
3. For PeopleSoft PeopleTools 8.48 and above, search PSFT\_HR or PSFT\_CR from the Nodes search page. Click to access the Connectors tab, as shown in the following example:

Node Definitions Connectors Portal WS Security Routings

Node Name PSFT\_CR

Details

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

Connector ID:

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

Node Status page for PeopleSoft PeopleTools 8.48 and above

4. Click the Ping Node button.

You see *Success* in the message text, as shown in the following example:



Node Status page for PeopleSoft PeopleTools prior to 8.48

If you do not see a successful message, you must refer to the *PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: Integration Broker* to debug.

**Note.** You must follow all of the preceding steps to get a successful ping.

## Task 8-5: Activating the Message Channel or Queue

This section discusses:

- Confirming that Channel HD\_360\_SETUP is Running
- Confirming that Queue HD\_360\_SETUP is Running

**Note.** If your PeopleSoft CRM and PeopleSoft HRMS systems are both running on PeopleSoft PeopleTools 8.48 or above, these steps are not required. You can proceed to task “Activating PeopleSoft CRM 91 and HRMS 89 Service Operations for PeopleSoft PeopleTools 8.48 and Above.”

### Task 8-5-1: Confirming that Channel HD\_360\_SETUP is Running

To confirm that channel HD\_360\_SETUP is running in the PeopleSoft HRMS system:

1. 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 8-5-2: Confirming that Queue HD\_360\_SETUP is Running

To confirm that queue HD\_360\_SETUP is running in the PeopleSoft CRM system:

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 8-6: Activating the HR\_HELPDESK\_360 EIP Messages

### Understanding Message Activation for HR\_HELPDESK

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.

---

**Note.** This task is only applicable for PeopleSoft PeopleTools release prior to 8.48.

---

### Task 8-6-1: Activating 360-Degree 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.

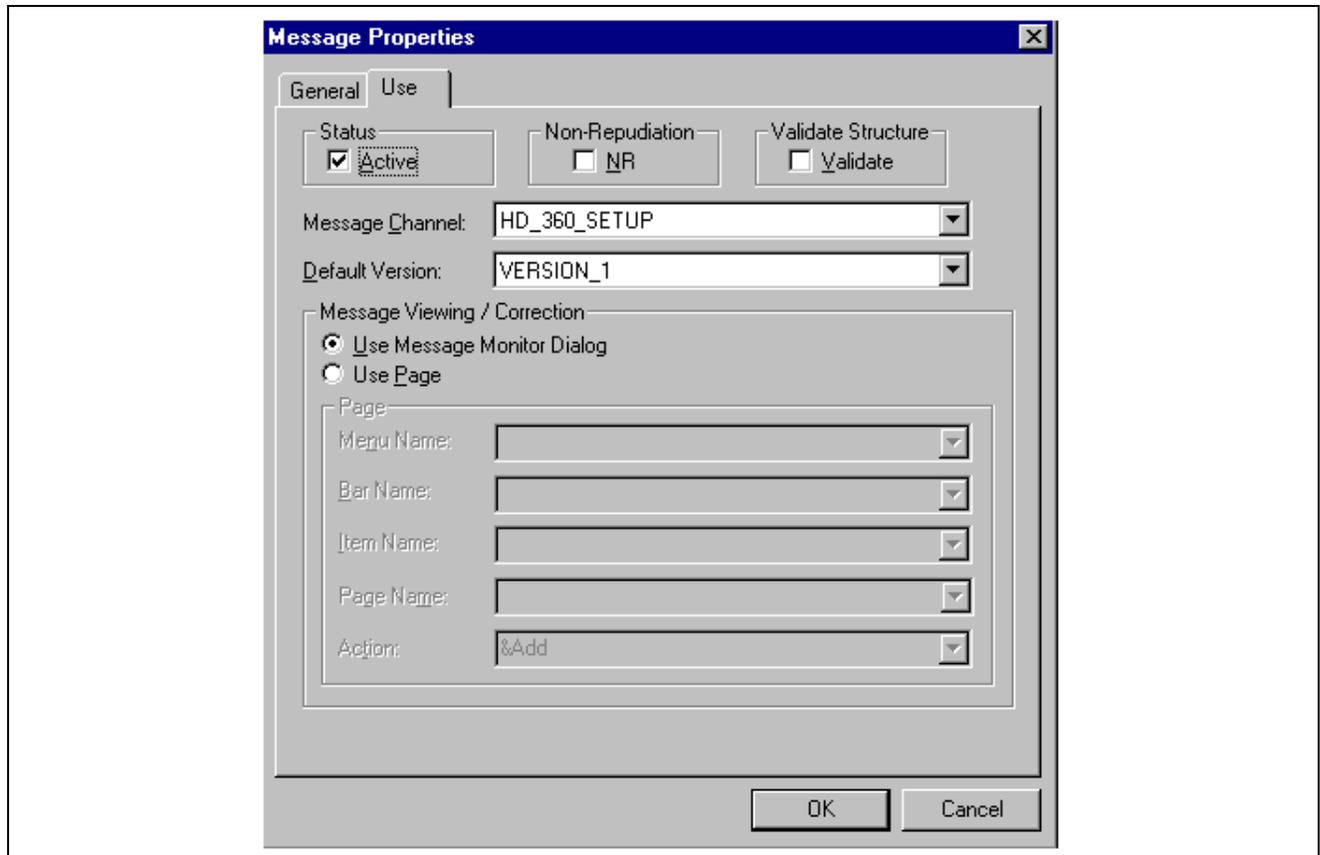
This enables you to find application message definitions.

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, as shown in the following example:



Message Properties dialog box

5. Click OK.
6. Save the message definition.

---

## Task 8-7: Activating PeopleSoft HRMS 89 PSFT\_CR Transactions

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.

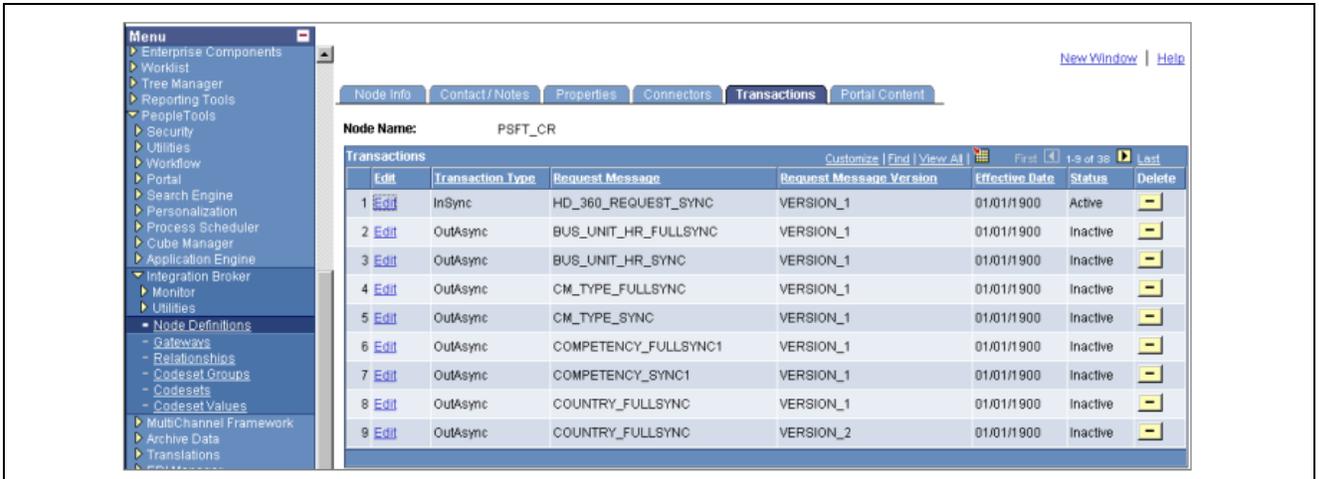
---

**Note.** This task is only applicable to PeopleSoft PeopleTools prior to 8.48.

---

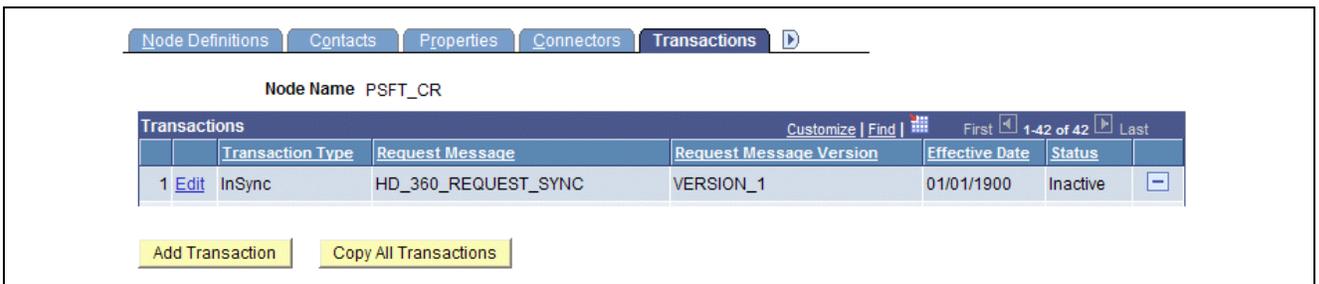
To activate transactions for the PSFT\_CR node in PeopleSoft HRMS:

1. Select PeopleTools, Integration Broker, Node Definitions and select the PSFT\_CR node in PeopleSoft HRMS, as shown in the following example:



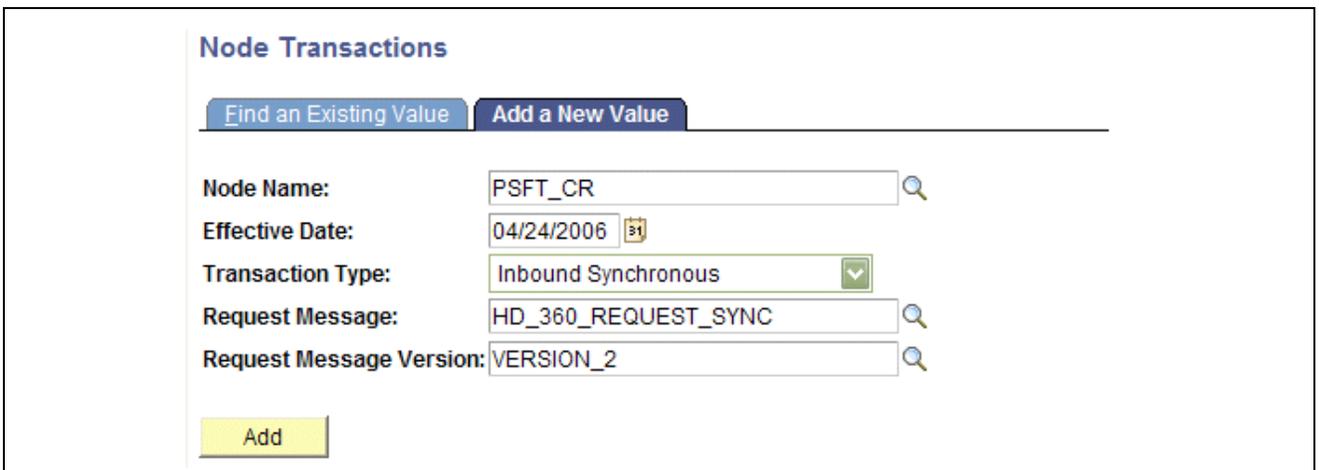
Node Definitions: Transactions page

2. Select the Transactions tab of the Node Definitions component and click the Add Transaction button, as shown in the following example:



Transactions page

On the Add a New Value tab of the Node Transactions page, enter the information shown in the following example:



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. Click the Add button to add VERSION\_2 of the HD\_360\_REQUEST\_SYNC message.

4. On the Transaction Detail page, change the status of the request message from *Inactive* to *Active*.  
The following example shows the Transaction Detail page prior the status change to *Active*:

The screenshot displays the 'Transaction Detail' page for a transaction with Node Name PSFT\_CR. The 'Messages' tab is selected. The transaction details are as follows:

- Effective Date: 04/24/2006
- Transaction Type: InSync
- Request Message: HD\_360\_REQUEST\_SYNC
- Request Message Version: VERSION\_2
- \*Status: Inactive (dropdown menu)
- Override Connector:
- Comment: (text area)

A link labeled 'Return to Transaction List' is located at the bottom right of the transaction detail window.

Transactions - Transaction Detail page

5. On the Messages tab, under Response Message, set the Message Name to HD\_360\_RESPONSE\_SYNC and the Message Version to VERSION\_2, as shown in the following example:

The screenshot shows the 'Messages' page in PeopleSoft. At the top, there are tabs for 'Transactions' and 'Messages'. Below the tabs, the 'Node Name' is 'PSFT\_CR'. The main content area is titled 'Transaction Messages' and includes a search bar and navigation controls. The details shown are:

- Effective Date: 04/24/2006
- Status: Inactive
- Transaction Type: InSync
- \*Synchronous Logging: No Logging (dropdown menu)

Below this is the 'Request Message' section with the following details:

- Message Name: HD\_360\_REQUEST\_SYNC
- Message Version: VERSION\_2
- External Name: (empty text box)

Below that is the 'Response Message' section with the following details:

- Message Name: HD\_360\_RESPONSE\_SYNC (with search icon)
- Message Version: VERSION\_2 (with search icon)
- External Name: (empty text box)

At the bottom right of the form area is a link: [Return to Transaction List](#). At the bottom left of the page is a 'Save' button.

Messages page

6. Click Save and then click OK to accept the related warning message that you may receive.

## Task 8-8: Activating PeopleSoft CRM 91 and HRMS 89 Service Operations for PeopleSoft PeopleTools 8.48 and Above

To activate the 360-Degree View service operations in both the PeopleSoft CRM and the HRMS 8.9 systems for PeopleSoft PeopleTools 8.48 and above:

**Note.** This task is applicable to PeopleSoft PeopleTools 8.48 and above.

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC, as shown in the following example:

**Services**

**Service:** HD\_360\_REQUEST\_SYNC

**\*Description:**

**Comments:**

HR Helpdesk Request message. This request message is sent to HRMS application to get worker information.

**Service Alias:**

**Object Owner ID:**

**\*Namespace:**

[View WSDL](#)

---

**Service Operations**

**Service Operation:**

**Operation Type:**

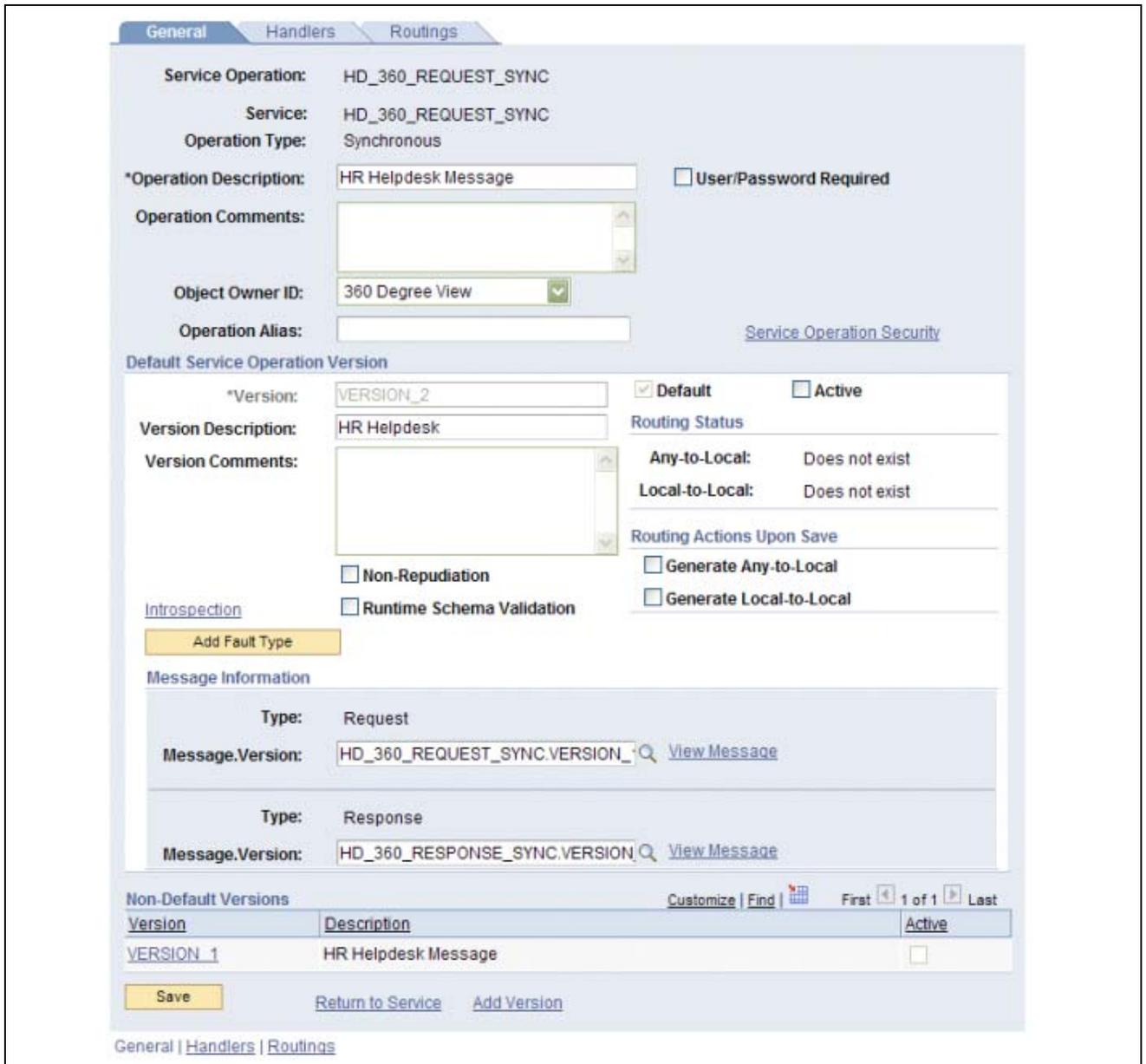
---

**Existing Operations** Customize | Find | View All |  1 of 1

Operation	Message Links	Active	Operation Type
<a href="#">HD_360_REQUEST_SYNC.VERSION_2</a>	HR Helpdesk	<input type="checkbox"/>	Synch

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, as shown in the following example:



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.  
Ensure that other routings are set to *Inactive*, as shown in the following example:

General Handlers **Routings**

Service Operation: HD\_360\_REQUEST\_SYNC  
 Default Version: VERSION\_2  
 User Exception  
 Note: This user exception status is applicable only if an outbound routing cannot be determined. If a valid outbound routing can be determined then the user exception status on the actual routing will be used.

Routing Name:

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<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 checked="" type="checkbox"/>	HD360_VERSION_2	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Active	

Routings page

- d. On the Routing page and the Routing Definitions page, select the Active check box, as shown in the following example:

**Routing Definitions** Parameters Connector Properties

Routing Name: HD360\_VERSION\_2  Active  
 System Generated  
 \*Service Operation: HD\_360\_REQUEST\_SYNC  
 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

- e. On the Routings page and the Routing Definitions page, verify that the User Exception check box is selected.
- f. Click the Save button to save your changes.

## Task 8-9: 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.

2. Select PeopleTools, Portal, Node Definitions and specify the PeopleSoft HRMS node.
3. In the Node definition component, select the Portal tab, as shown in the following example:

Node Definitions - Portal page

**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 Portal menu folder, *not* in the Integration Broker folder.

4. 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.
5. Click Save.

## Task 8-10: Activating Link Category for PeopleSoft HRMS 8.9

In PeopleSoft CRM 9.1, the delivered active links are for PeopleSoft HRMS 9.1. If you are integrating to PeopleSoft HRMS 8.9, you must de-activate the 9.1 links and activate the 8.9 links in the PeopleSoft CRM database.

To activate the link category definition for PeopleSoft HRMS 8.9:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Category.
2. Search for version 8.9, as shown in the following example:

### Link Category

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300):

**Link Category:**    
**Version:**      
**Active Flag:**      
**Long Description:**

[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="#">8.9</a>	<a href="#">Inactive</a>	<a href="#">Benefits</a>	<a href="#">Benefits</a>
<a href="#">HRMS</a>	<a href="#">8.9</a>	<a href="#">Inactive</a>	<a href="#">HRMS</a>	<a href="#">Human Resources</a>
<a href="#">PAYR</a>	<a href="#">8.9</a>	<a href="#">Inactive</a>	<a href="#">Payroll</a>	<a href="#">Payroll</a>
<a href="#">STOCK</a>	<a href="#">8.9</a>	<a href="#">Inactive</a>	<a href="#">Stock</a>	<a href="#">Stock</a>
<a href="#">TRNG</a>	<a href="#">8.9</a>	<a href="#">Inactive</a>	<a href="#">Training</a>	<a href="#">Training</a>

Link Category search page

Perform the following steps to activate each link category.

3. Click the Modify System Data button, as shown in the following example:

**Link Category Definition**

Link Category BENEF Version 8.9

**Link Category Details**

Order 20 Active Flag Inactive

Short Name Benefits

Long Description Benefits

Modify System Data

This object is maintained by PeopleSoft.

Created 12/10/2004 5:08PM PST By PPLSOFT

Modified 12/10/2004 5:08PM PST By PPLSOFT

\* Required Field

Save Return to Search Previous in List Next in List Add Update/Display

Link Category Definition page

4. Select *Active* from the Active Flag drop-down list box, as shown in the following example:

**Link Category Definition**

Link Category BENEF Version 8.9

**Link Category Details**

Order 20 \*Active Flag Active

\* Short Name Benefits

\* Long Description Benefits

This object was delivered by PeopleSoft but updated by the customer.

Created 12/10/2004 5:08PM PST By PPLSOFT

Modified 12/10/2004 5:08PM PST By PPLSOFT

\* Required Field

Save Return to Search Previous in List Next in List Add Update/Display

Updated Link Category Definition page

5. Click Save.
6. Repeat steps 3 through 5 for each 8.9 link category.
7. For delivered active 9.1 action link categories, perform the same steps to de-activate.
8. Select Home, Set Up CRM, Product Related, Call Center, Link Group.
9. Open Link Group HRMS. The data delivered here is for HRMS 9.1. Since version 9.1 is delivered as active links, you must update the 8.9 links.

10. Select the System Data tab, and then click the System Data button to modify the system data, as shown in the first few rows of the example that follows. Perform this for *all* rows.

This example shows the first two rows of the System Data as modified:

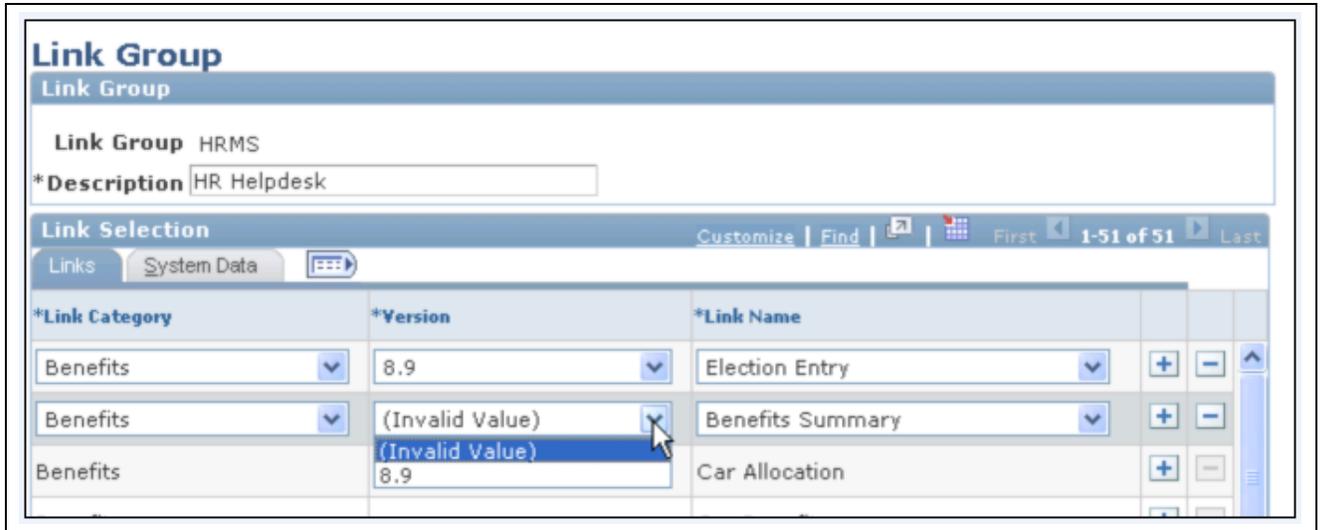
The screenshot shows the 'Link Group' interface with the 'System Data' tab selected. The table below represents the data shown in the screenshot:

System Data	Message Description	Date Modified	Modified By		
System Data	<b>This object was delivered by PeopleSoft but updated by the customer.</b>	09/16/2009 1:12PM		+	-
System Data	<b>This object was delivered by PeopleSoft but updated by the customer.</b>	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	12/16/2004 4:26PM		+	-
System Data	This object is maintained by PeopleSoft.	12/16/2004 4:26PM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-

System Data tab showing the system data for the link groups being modified

11. Select the Links tab; all rows become editable. The 9.1 version becomes invalid in the version drop-down list box.
12. As all of the links delivered are for 9.1, you must evaluate which links are applicable for 8.9. Based on your business needs, do one of the following:
- Change the version to 8.9 if it is applicable.
  - Delete the row by clicking the Delete (–) button at the end of the row.
  - Add new 8.9 links by clicking the Add (+) button.

The following example shows the Links tab as the version for the link groups is being modified:



Links tab



## CHAPTER 9

# Integrating PeopleSoft CRM and PeopleSoft CS for Higher Education 360-Degree View

This chapter discusses:

- Prerequisites
- Setting Up the Gateway for PeopleSoft CRM and PeopleSoft CS
- Setting Up PeopleSoft Single Signon
- Setting Up the PeopleSoft CRM and PeopleSoft CS Nodes
- Activating the PeopleSoft Higher Education 360 Service Operation and Routing
- Configuring PeopleSoft CS to Define Integration Data
- Setting Up Portal Content Links for Action Links

---

## Prerequisites

This chapter provides instructions for setting up 360-Degree View enterprise integration points (EIP) that are used to enable access to the Higher Education (HE) 360-Degree View from PeopleSoft Enterprise Customer Relationship Management (CRM).

Before you perform the tasks in this chapter you must install and configure:

- A PeopleSoft Enterprise Customer Relationship Management (CRM) 9.1 database.
- CRM 9.1 Integrated to Campus Solutions 9.0 Feature Pack 2 provides additional features over CRM 9.1 integrated to earlier versions of Campus Solutions. For more information about this integration, refer to “Appendix B: Getting Started with CRM for Higher Education,” in this documentation.

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**Important!** Oracle recommends that you apply service packs or application bundles as they become available to benefit from the latest product level, as well as application and integration requirements. You can access the latest updates, service packs and bundles on My Oracle Support. Consult My Oracle Support before proceeding with your installation.

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## Task 9-1: Setting Up the Gateway for PeopleSoft CRM and PeopleSoft CS

A gateway must be set up between the PeopleSoft CRM and PeopleSoft CS systems. PSFT\_CR is the delivered local node on the PeopleSoft CRM system. PSFT\_HR is the delivered local node on the PeopleSoft CS system. The gateway URL defines these two nodes in the gateway property.

To set up the gateway in both the PeopleSoft CRM and PeopleSoft CS systems:

1. In the PeopleSoft CRM system, access the Gateways page by selecting PeopleTools, Integration Broker, Configuration, Gateways. For example:

*http://<webservice machine name><port>/PSIGW/PeopleSoftListeningConnector*

2. Search for and open the *LOCAL* gateway, as shown in the following example:

**Gateways**

Gateway ID: LOCAL

Local Gateway  Load Balancer

URL:

[Gateway Setup Properties](#)

*Connector ID	Description	*Connector Class Name	Properties	+	-
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 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+	-
8 PSFTTARGET		PeopleSoftTargetConnector	Properties	+	-
9 SMTPTARGET		SMTPTargetConnector	Properties	+	-

PeopleSoft Integration Broker - Gateways page

On the Gateways page, do the following:

- a. Click the Save button to save the page.
- b. Click the Load Gateway Connectors button.  
You will receive a message “Loading process was successful.”
- c. Acknowledge the message.
- d. Click Save to save the page again.
- e. Click the Ping Gateway button, to test your ping and verify that it is successful, as shown in the following example:

**PeopleSoft Integration Gateway**

PeopleSoft Listening Connector  
Tools Version : 8.50-810-R2  
Status: ACTIVE

PeopleSoft Integration Gateway - PeopleSoft Listening Connector

3. Click the Gateway Setup Properties link to set up local and remote nodes in the gateway, as shown in the following example:

URL: http://adas0180.peoplesoft.com/PSIGW/PeopleSoftListeningConnector

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release
//ADAS0180:9000	CVP1	*****	8.50-810-R2

PeopleSoft Nodes

Node Name	App Server URL	User ID	Password	Tools Release	Ping Node
PSFT_CR	//ADAS0180:9000	CVP1	*****	8.50-810-R2	Ping Node + -
PSFT_HR	//ADAS0116:9000	PS	**	8.50-810-R2	Ping Node + -

PeopleSoft Node Configuration page in the Gateway

4. Log in to the Gateway Setup Properties.
5. In the PeopleSoft Nodes grid, click the Add (+) button to add the local and remote node information:
  - a. In the Node Name column, enter the node name.
  - b. In the App Server URL column, enter the application server URL.
  - c. In the User ID column, enter the user ID.
  - d. In the Password column, enter the password.
  - e. In the Tools Release column, enter the PeopleTools release number.
6. Click Save.
7. Click the OK button to return to the Gateway page.
8. Click Save. to save the Gateway page again.
9. Repeat the same Gateway set up steps in the PeopleSoft CS system.

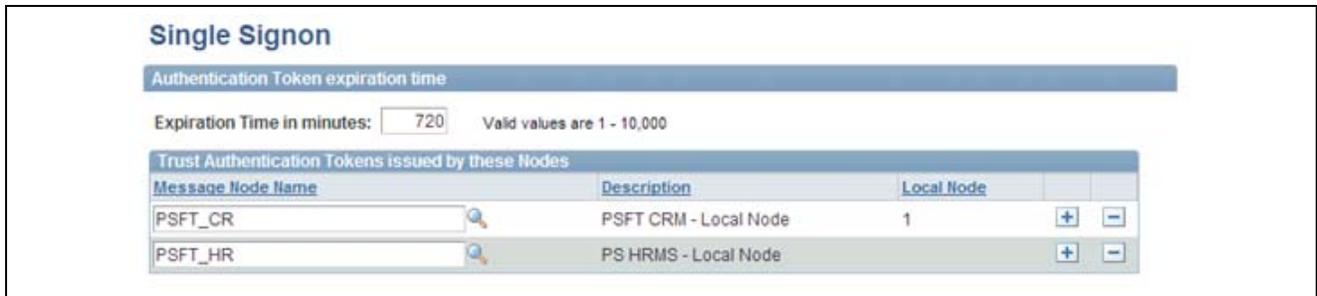
## Task 9-2: Setting Up PeopleSoft Single Signon

Integration should be set up to support single signon so that users do not need to sign on to PeopleSoft CS manually when transferring from the PeopleSoft CRM to the PeopleSoft CS systems. To do this, you must define the remote node as a trusted node in each system.

To set up the remote node as a trusted node in both the PeopleSoft CRM and PeopleSoft CS systems:

1. In the PeopleSoft CRM system, access the Single Signon page by selecting PeopleTools, Security, Security Objects, Single Signon.

The default is to add the local node as a trusted node, as shown in the following example:



PeopleSoft Single Signon page - Trust Authentication Tokens issued by these Nodes grid

2. Specify the remote node PSFT\_HR as a trusted node by adding it to the Trust Authentication Tokens issued by these Nodes grid:
  - a. In the Message Node Name column, select the *PSFT\_HR* node.
  - b. Click Save.
3. Repeat the same steps in the PeopleSoft CS system.

## Task 9-3: Setting Up the PeopleSoft CRM and PeopleSoft CS Nodes

This section discusses:

- Setting Up the Authentication Option for the PSFT\_CR Node (Optional)
- Defining a PSFTTARGET Connector ID for Nodes in PeopleSoft CRM and PeopleSoft CS
- Pinging the PeopleSoft CRM and PeopleSoft CS Nodes to Verify Configuration

### Task 9-3-1: Setting Up the Authentication Option for the PSFT\_CR Node (Optional)

You can set a password authentication option for the PSFT\_CR and the PSFT\_HR nodes and define the same password for the node in both systems. This task is optional.

To set up the authentication option for the PSFT\_CR node:

1. Access the PeopleSoft CRM system, and select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the *PSFT\_CR* node.

The Node Definitions page appears, as shown in the following example:

The screenshot displays the 'Node Definitions' page for a node named 'PSFT\_CR'. The page has a navigation bar with tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Node Definitions' tab is active. The form contains the following fields and options:

- Node Name:** PSFT\_CR
- \*Description:** PSFT CRM - Local Node
- Node Type:** PIA
- \*Authentication Option:** Password (dropdown menu)
- Node Password:** [Masked with dots]
- \*Default User ID:** PSCR
- Hub Node:** [Empty field]
- Master Node:** [Empty field]
- Company ID:** [Empty field]
- IB Throttle Threshold:** [Empty field]
- Image Name:** [Empty field]
- Codeset Group Name:** [Empty field]

On the right side, there are two buttons: 'Copy Node' and 'Rename Node'. Below the form, there are three buttons: 'Save', 'Contact/Notes', and 'Properties'. On the right side of the form, there are five checkboxes: 'Default Local Node' (checked), 'Local Node' (checked), 'Active Node' (checked), 'Non-Repudiation' (unchecked), and 'Segment Aware' (unchecked).

PeopleSoft Integration Broker - Nodes: Node Definitions page

3. On the Node Definitions page, specify a password authentication option for the PSFT\_CR node.
4. On the Node Definitions page (in the PeopleSoft CRM system), select *Password* from the Authentication Option drop-down list box for the PSFT\_CR node.
5. In the Password field, enter an appropriate password. The default password is *PSOFT*.
6. Access the same PSFT\_CR node from the PeopleSoft CS system.
7. On the Node Definitions page (in the CS system), select *Password* from the Authentication Option drop-down list box for the PSFT\_CR node.
8. In the Password field, enter the same password as you did in the PeopleSoft CRM system.
9. Repeat the steps in this task for the PSFT\_HR node, if it needs to be password authenticated.

## Task 9-3-2: Defining a PSFTTARGET Connector ID for Nodes in PeopleSoft CRM and PeopleSoft CS

To define a PSFTTARGET connector ID for nodes in PeopleSoft CRM and PeopleSoft CS:

1. Access the PeopleSoft CRM system. Select Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the PSFT\_CR node.  
The Node Definitions page appears.
3. Click the Connectors tab to access the Connectors page, as shown in the following example:

Node Name PSFT\_CR [Ping Node](#)

**Details**

Gateway ID: LOCAL [?](#) PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)

Connector ID: PSFTTARGET [?](#)

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

[Save](#)

**Ping node result:**

**Ping Node Results**

Node Information			
Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

[Return](#)

PeopleSoft Integration Broker - Nodes: Connectors page

- Specify *PSFTTARGET* as the connector ID for the PSFT\_CR and the PSFT\_HR nodes.
- Click Save.
- Repeat these steps for the PSFT\_HR node in the PeopleSoft CRM system.
- Access the PeopleSoft CS system and repeat the same steps for both the PSFT\_HR and the PSFT\_CR nodes.

### Task 9-3-3: Pinging the PeopleSoft CRM and PeopleSoft CS Nodes to Verify Configuration

To ping the PSFT\_HR and PSFT\_CR nodes:

- Access the PeopleSoft CRM system. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
- Search for and open the *PSFT\_CR* node.
- Click the Node Connectors tab to access the Node Connectors page.
- Click the Ping Node button to test for successful communication, as shown in the following example:

**Ping Node Results**

Node Information			
Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

[Return](#)

Ping Node Results page

- On the Ping Node Results page, verify that *Success* appears in the Message Text column.
- Click the Return button to return to the Connectors page.
- Click the Return to Search link.

8. Search for and open the *PSFT\_HR* node.
9. Click the Connectors tab to access Connector page.
10. Click the Ping Node button to test for successful communication.
11. On the Ping Node Results page, verify that *Success* appears in the Message Text column.
12. Click the Return button to return to the Connectors page.
13. Access the PeopleSoft CS system and repeat the same steps in this task for both the PSFT\_CR and the PSFT\_HR nodes.

---

**Note.** All previous steps must be followed in order to receive successful pings.

---

## Task 9-4: Activating the PeopleSoft Higher Education 360 Service Operation and Routing

In the PeopleSoft CRM and the PeopleSoft CS systems, activate both the service operation and the routing for PeopleSoft Higher Education (HE) 360–Degree View.

To activate the HE 360-Degree View service operation and routing:

1. In the PeopleSoft CRM system, select PeopleTools, Integration Broker, Integration Setup, Service Operations to access the Service Operations pages.
2. Search for and open service operation *SCC\_CONSTITUENT\_READ360SUMMARY*, as shown in the following example:

The screenshot displays the 'General' tab of the Service Operations configuration page. The service operation is identified as *SCC\_CONSTITUENT\_READ360SUMMARY*. It is configured as a synchronous operation with the description 'Higher Education 360'. The object owner is set to '360 Degree View'. A version 'v1' is defined with the description 'HE 360 V1'. The 'Active' checkbox is checked, indicating the operation is enabled. The routing status is currently 'Does not exist' for both any-to-local and local-to-local scenarios.

PeopleSoft Integration Broker - Service Operations: General page

3. On the General page, ensure that the Active check box is selected.

- Click the Routings tab to access the Routings page, as shown in the following example:

Service Operation: SCC\_CONSTITUENT\_READ360SUMMARY  
 Default Version: v1  
 User Exception  
 Note: This user exception status is applicable only if an outbound routing cannot be determined. If a valid outbound routing can be determined then the user exception status on the actual routing will be used.

Routing Name:  Add

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input type="checkbox"/>	HE360	v1	Synch	PSFT_CR	PSFT_HR	Outbound	Active	

Inactivate Selected Routings    Activate Selected Routings

PeopleSoft Integration Broker - Service Operations: Routings page

- In the Status column, verify that only one routing shows as *Active* from sender node PSFT\_CR to receiver node PSFT\_HR.
- On the Routings page, verify that the User Exception check box is selected.
- In the Routing Definitions section, click the HE360 link to access the Routings Definition page, as shown in the following example:

Routing Name: HE360  Active  
 System Generated

\*Service Operation: SCC\_CONSTITUENT\_READ360SUMM  
 Version: v1  
 \*Description: HE360 [Graphical View](#)  
 Comments:

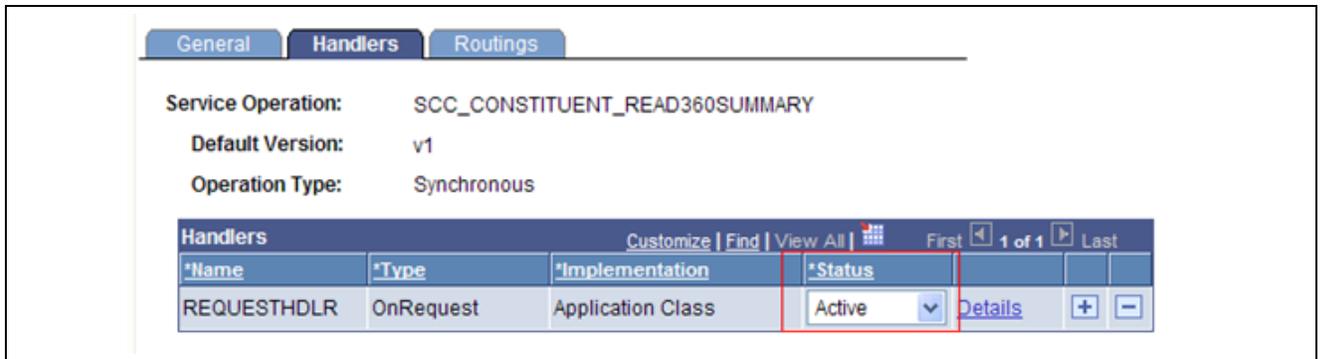
\*Sender Node: PSFT\_CR  
 \*Receiver Node: PSFT\_HR  
 Operation Type: Synchronous  User Exception  
 Object Owner ID: 360 Degree View  
 \*Log Detail: No Logging

Save    Return

Routings Definition page

- On the Routings Definition page, verify that the User Exception check box is selected.
- Access the PeopleSoft CS system and repeat the same steps in this task to activate service operation and routing for PeopleSoft HE 360.

**Important!** While in the PeopleSoft CS system, click the Handlers tab to access the Handlers page and verify that the handler Status is set to *Active*, as shown in the following example:



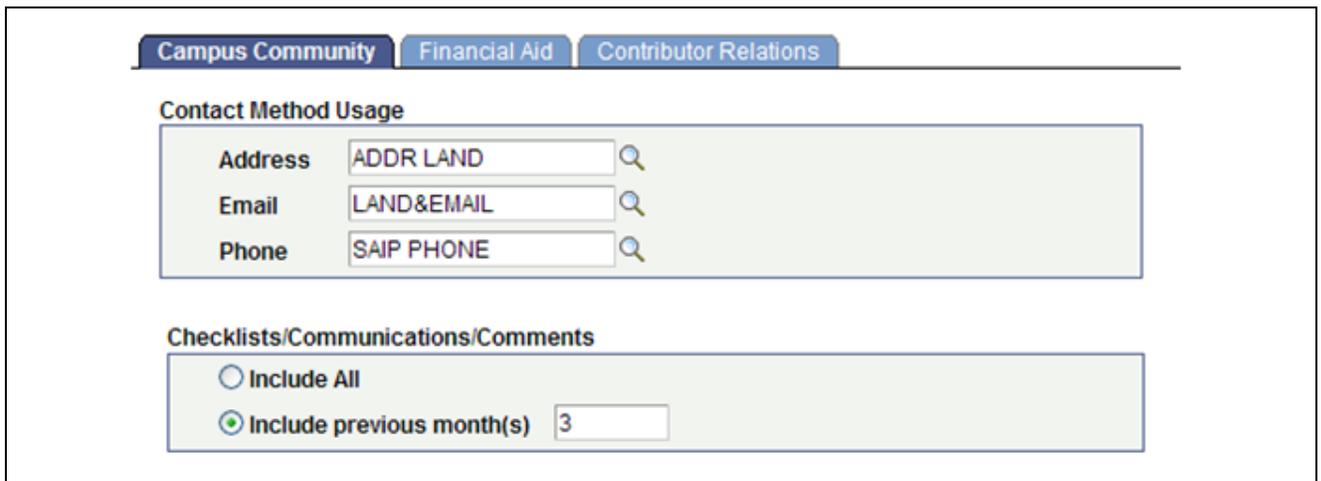
PeopleSoft Integration Broker - Service Operations: Handlers page

## Task 9-5: Configuring PeopleSoft CS to Define Integration Data

After you complete the PeopleSoft HE 360-Degree View EIP setup, you can set up the configuration in PeopleSoft CS to define the integration data, based on your business requirements.

Use the Campus Community configuration pages to define the integration parameters for the PeopleSoft CS Campus Community, Financial Aid, and Contributor Relations pages, based on your particular user base and business requirements.

1. Select Setup SACR, System Administration, Integrations, Configure Integrations.
2. Click the Campus Community tab to access the Campus Community page, as shown in the following example:



PeopleSoft Campus Solutions - Campus Community page

3. In the Contact Method Usage section of the Campus Community page, specify the type of Address, Email, and Phone that the system will use to retrieve PeopleSoft CS data for the PeopleSoft HE 360 profile.
4. In the Checklists/Communications/Comments section, specify the amount of 3C data that the system will retrieve from PeopleSoft CS.

The default value is 3 months for performance concerns.

5. Click the Financial Aid tab to access the Financial Aid page, as shown in the following example:



PeopleSoft Campus Solutions - Financial Aid page

6. On the Financial Aid page, do one of the following:
  - Select the Include All option to retrieve all financial aid information for PeopleSoft HE 360.
  - Select the Selected Financial Aid Year(s) option, and then select the Institution and Aid Year from which you want the system to retrieve the information.
1. Click the Contributor Relations tab to access the Contributor Relations page, as shown in the following example:



PeopleSoft Campus Solutions - Contributor Relations page

2. On the Contributor Relations page, do one of the following:
  - Select the Include All option to retrieve all relationships for contributor relations.
  - Select the Relationship(s) option to specify the relationship types (ID Type and Person Description) to be retrieved for PeopleSoft HE 360.

## Task 9-6: Setting Up Portal Content Links for Action Links

To enable action links of Higher Education Case to access PeopleSoft CS, you must define the portal content. Oracle delivers all action links as defined under the portal node HRMS.

To define portal content:

1. In the PeopleSoft CRM system, select PeopleTools, Portal, Node Definitions.
2. Search for and open the *HRMS* node to access the Node Definitions page.
3. Select the Portal tab to access the Portal Content page, as shown in the following example:

The screenshot shows the 'Portal' tab selected in a navigation menu. The 'Node Name' is 'HRMS'. Under the 'Details' section, the 'Description' is 'Portal Node - HRMS' and there is an unchecked 'Local Node' checkbox. The 'Tools Release' field contains '8.50-810-R2' and the 'Application Release' field is empty. The 'Content URI Text' field contains 'http://rhas005.us.oracle.com:7001/psc/h900p2bnt/' with an example 'http://someserver/psc/pshome/' above it. The 'Portal URI Text' field contains 'http://rhas005.us.oracle.com:7001/psp/h900p2bnt/' with an example 'http://someserver/psp/pshome/' above it. A 'Save' button is located at the bottom left.

PeopleSoft Portal - Node Definitions: Portal page showing the Content URI Text and Portal URI Text defined

**Note.** This is for action links on PeopleSoft CRM Case page to access PeopleSoft CS. This is only necessary for action links. The Node Definition required for this step is under the Portal menu, not the Integration Broker menu.

4. In the Content URI Text and Portal URI Text fields, enter the URI text to define the PeopleSoft CS system that users will transfer to from the PeopleSoft CRM system.

For example:

- Content URI: `http://<webserver machine name>:<Port>/psc/<PIA website name>/`
- Portal URI: `http://<webserver machine name>:<Port>/psp/<PIA website name>/`

5. Click Save.



## CHAPTER 10

# Deploying and Configuring the PeopleSoft Connector and the Oracle Enterprise Manager Console

This chapter discusses:

- Prerequisites
- Copying the JAR File
- Deploying and Registering the PeopleSoft Connector
- Troubleshooting the PeopleSoft Connector Registration
- Configuring the PeopleSoft Connector

---

## Prerequisites

To enable integration between the PeopleSoft Connector and the Oracle Enterprise Manager Console you must:

- Copy the JAR file to the Oracle Enterprise Manager (EM) server.
- Deploy, register, and configure the PeopleSoft Connector.

---

**Important!** Some existing connectors may be delivered with the Oracle EM installation; for example, the Remedy Connector. Before you deploy the PeopleSoft Connector, ensure that you remove the Remedy Connector or any other existing connectors. Oracle EM does not support multiple active connectors simultaneously.

---

To remove the Remedy Connector, or any other existing connectors:

1. Login to the Oracle EM Console and select Setup, Management Connectors.  
Here you can access a list of all connectors currently registered in the system.
2. Select the Remedy or other existing connector and click the Remove button.
3. Click Save.

---

**Note.** Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.50 Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks.

---

---

**Note.** Consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

---

**Note.** Before you begin your deployment and configuration of the PeopleSoft Connector and the Oracle Enterprise Manager Console, consult the PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide available on My Oracle Support for the latest supported platform information.

---

---

**Note.** The deployment commands that are used in this installation guide are applicable for Oracle EM 10gR3 and 10gR4.

---

---

## Task 10-1: Copying the JAR File

Oracle delivers the JAR file *PSFTConnector.jar* that includes the Oracle EM Event Model XML, the PeopleSoft Connector Descriptor XML, and the sample template XSLT files that are discussed in this documentation.

Copy the *PSFTConnector.jar* file from `<PS_HOME>\src\xml\enterprise manager\` to the Oracle EM server.

For Oracle EM 10gR3 and 10gR4 the file should be copied to: `$ORACLE_HOME\sysman\connector\`

This depends upon where you install Oracle home. `$ORACLE_HOME` can be: `c:\oracleHomes\oms10g`

---

## Task 10-2: Deploying and Registering the PeopleSoft Connector

Several Oracle EM Command-Line Utility (emctl) commands are used to deploy and register the PeopleSoft Connector.

To extract the JAR file into `$ORACLE_HOME/sysman/connector/<connector_name_wo_space>` directory:

1. Enter this command: `emctl extract_jar connector <jar_file_name> <connector_name> <oracle_home>`

For example:

```
C:\OracleHomes\oms10g\bin\emctl extract_jar connector C:\OracleHomes\oms10g\sysman\connector
\PSFTConnector.jar "Peoplesoft Connector"C:\OracleHomes \oms10g
```

---

**Note.** The connector name is the name specified in the connector descriptor XML file. The command replaces the spaces in the connector name with underscores ( `_` ) in `connector_name_wo_space`.

For example, a connector named Peoplesoft Connector will have a directory of Peoplesoft\_Connector under the directory of the Oracle home connector. If the Peoplesoft\_Connector directory already exists, the `extract_jar` command will extract files to this directory. Otherwise, it will create a new directory called Peoplesoft\_Connector and copy the files to this new directory.

---

2. Register the connector by entering this command: `emctl register_connector connector <PSFTConnectorDescriptor.xml> <serverName> <port> <databaseSid> <username> <password> <oracle_home>`

---

**Note.** The Username for the register connector must be *sysman*.

---

For example:

```
C:\OracleHomes\oms10g\BIN>emctl register_connector connector C:\OracleHomes\oms10g\sysman
\connector\Peoplesoft_Connector\PSFTConnectorDescriptor.xml adnttp39.peoplesoft.com 1521
EMREPDEV sysman sysman C:\OracleHomes\oms10g
```

3. Oracle delivers two templates:
  - The PeopleSoft Sample Template: Used to create or update a case.
  - The PeopleSoft Auto-Close Template: Automatically closes out an open case with a solvable EM action.

Register the delivered templates by entering this command: `emctl register_ticket_template connector <PSFTSampleTicketTemplate.xml> <serverName> <port> <databaseSid> <username> <password> <connectorTypeName> <connectorName> <templateName> <templateDescription>`

The `<connectorTypeName>` `<connectorName>` `<templateName>` `<templateDescription>` are quoted strings. The `<templateName>` and `<templateDescription>` can have spaces in them.

The template name and description are displayed on the Oracle EM console.

For example:

```
C:\OracleHomes\oms10g\BIN>emctl register_ticket_template connector c:\OracleHomes\oms10g
\sysman\connector\Peoplesoft_Connector\PSFTSampleTicketTemplate.xml adnttp39.peoplesoft.com
1521 EMREPDEV sysman sysman "Peoplesoft Connector" "Peoplesoft Connector" "Sample Ticket"
"Sample Ticket Template"
```

---

**Note.** Because the Oracle EM Connector can only support one active connector, ensure that you delete the connector from the console. After you redeploy a connector, you must re-register the templates, even if they have not changed. This is because the templates are disconnected at the time the connector is deleted.

---

The following table lists the values for the parameters:

Parameters	Description
connector_name_wo_space	Specify <i>Peoplesoft Connector</i> . The command will replace the spaces in the connector name with underscores ( <code>_</code> ) in <code>connector_name_wo_space</code> . A new directory called <code>Peoplesoft_Connector</code> will be created and copy the files to this new directory under <code>\$Oracle_Home/connector</code> . If the <code>Peoplesoft_Connector</code> directory already exists, the <code>extract_jar</code> command will extract files to this directory.
PSFTConnectorDescriptor.xml	The file resides in the <code>Peoplesoft_Connector</code> directory home upon successful extraction: i.e: <code>\$ORACLE_HOME/connector/Peoplesoft_Connector/</code>
PSFTSampleTicketTemplate.xls	A sample ticket template that is used to create or update a case.
server	Host name of the Oracle Enterprise Manager repository. For example: <code>adnttp39.peoplesoft.com</code>

Parameters	Description
port	Oracle Listener port of the repository. For example: <i>1521</i>
database sid/ Service Name	Repository database instance ID. For example: <i>EMREPDEV</i>
username	Specify <i>SYSMAN</i> .
password	Password for SYSMAN.
connectorTypeName	Specify "Peoplesoft Connector". The double quotes (") are mandatory. The connector is case sensitive and should match the name specified in the PSFTConnectorDescriptor.xml.
connectorName	Specify "Peoplesoft Connector". The double quotes (") are mandatory.
templateName	An intuitive name for the ticket template that will be displayed in the Oracle Enterprise Manager. The double quotes (") are mandatory. For example: <i>"Sample Ticket"</i>
description	A short description for the ticket template. This description is also displayed in the Oracle Enterprise Manager. The double quotes (") are mandatory. For example: <i>"Sample Ticket Template"</i>

## Task 10-3: Troubleshooting the PeopleSoft Connector Registration

If an incorrect template is registered that is tied to a invalid connector, and the template cannot be deleted from the Oracle EM console, do the following:

1. Connect to the EM repository as SYSMAN.
2. `SELECT prop_name, value_id FROM mgmt_cntr_config WHERE config_name = 'TicketTemplates';`

You can retrieve the template name (`prop_name`) from this query. This should be the same name as the name of the file that you registered as the template.

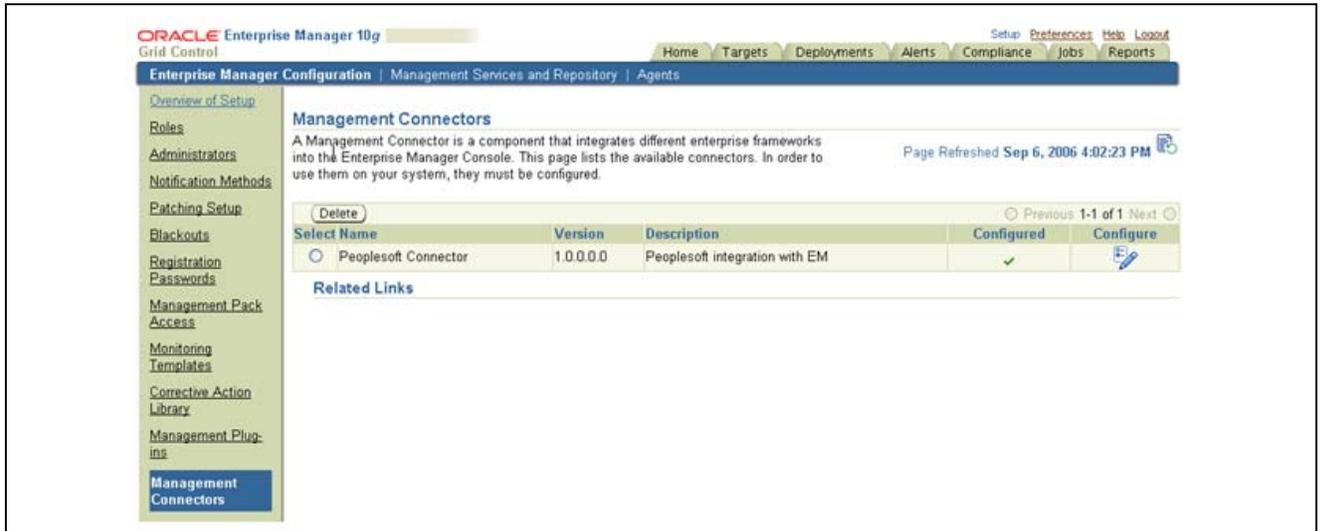
`:prop_name` and `:value_id` that you get here will be used in the following commands:

- a. `DELETE FROM mgmt_cntr_l_val WHERE value_guid = :value_id;`
- b. `DELETE FROM mgmt_cntr_s_val WHERE value_guid IN (SELECT value_id FROM mgmt_cntr_config WHERE config_name = :prop_name);`
- c. `DELETE FROM mgmt_cntr_config WHERE prop_name = :prop_name OR config_name = :prop_name;`
- d. `EXEC mgmt_notification.delete_device ('SYSMAN', ':prop_name');`

## Task 10-4: Configuring the PeopleSoft Connector

After the PeopleSoft Connector is successfully deployed:

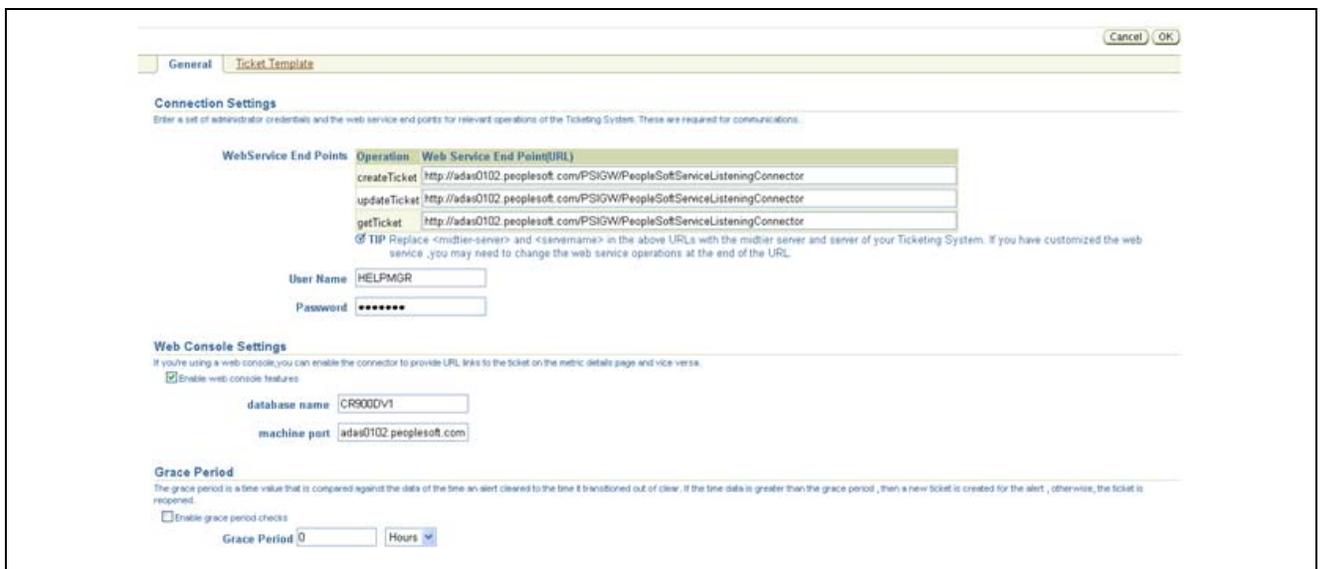
1. Click the EM Console URL and login to the Oracle EM console.
2. From the Oracle EM console, select Setup, Management Connectors, to access the Management Connectors page, as shown in the following example:



Oracle Enterprise Manager - Management Connectors page

3. On the Oracle EM Management Connections page, select the Peoplesoft Connector option, and then click the Configure button.

The Oracle EM Configure Management Connector - Peoplesoft Connector: General page appears, as shown in the following example:



Oracle Enterprise Manager Configure Management Connector - Peoplesoft Connector: General page

4. Use the Oracle EM Configure Management Connector - Peoplesoft Connector General page to configure the Peoplesoft Connector:

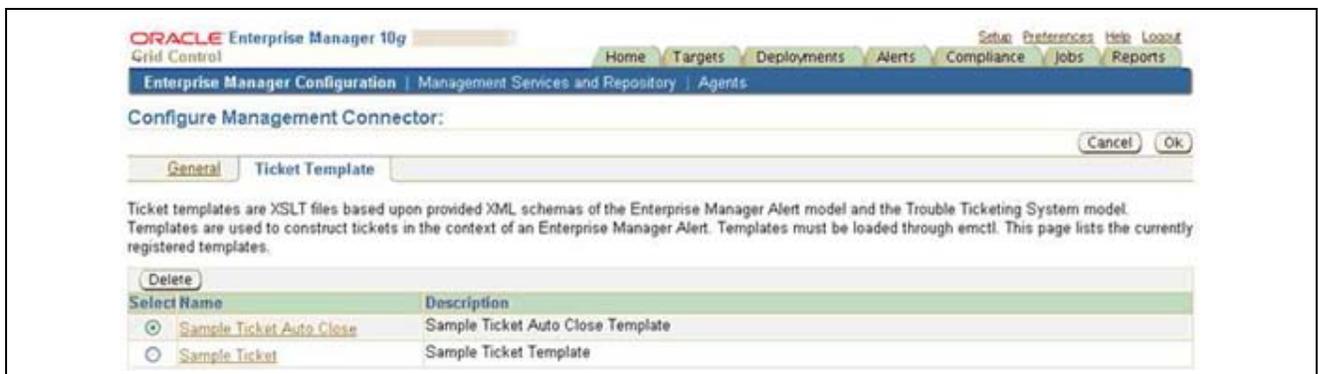
- a. WebService End Points: Specify WebService End Points for createTicket, updateTicket, and getTicket web service operations.
- b. WebService Credentials: User ID and password to log in to the PeopleSoft CRM system for adding or updating a case.
- c. Web Console Settings: A URL that can transfer to the PeopleSoft CRM case from the Oracle EM system.

This is used on the Oracle EM metric detail page to drill into the case.

- d. Grace Period: A time value that is compared against the data when an alert is cleared to the time when it has transitioned out of clear.

If this span of time is greater than the grace period, a new ticket is created for the alert. Otherwise, the ticket is reopened. The idea is not to create the case for the same alert within a defined time period.

5. Click the Ticket Template tab to access the Oracle EM Configure Management Connector - Peoplesoft Connector: Ticket Template page, as shown in the following example:



Oracle Enterprise Manager Configure Management Connector - Peoplesoft Connector: Ticket Template page

The Oracle EM Configure Management Connector - Peoplesoft Connector Ticket Template page lists all registered templates for the PeopleSoft Connector.

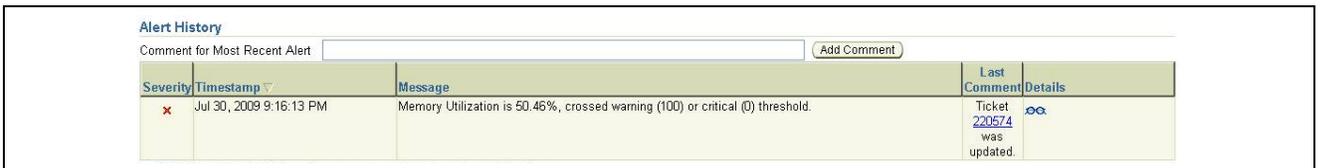
6. From the Oracle EM Configure Management Connector - Peoplesoft Connector Ticket Template page, select Preferences, Notification Rules.

The Oracle Enterprise Manager - Notification Rules: View Notification page appears, as shown in the following example:



Oracle Enterprise Manager - Notification Rules: View Notification page

- Set up your desired rules to use the registered template to create a case in the PeopleSoft HelpDesk system. After a case is created or updated, the user can drill into a case from the Oracle EM Metric Detail page. Your navigation to the Oracle EM Metric Detail page is dependent upon how you set up your alert. The following shows an example of the Alert History page:



Alert History page



# CHAPTER 11

## Installing the PeopleSoft CRM 9.1 Portal Pack

This chapter discusses:

- Understanding PeopleSoft Portal Pack Installation
- Granting PeopleSoft Portal Pack Personalization
- Accessing PeopleSoft CRM Through the Enterprise Portal

---

### Understanding PeopleSoft Portal Pack Installation

This chapter provides instructions for the installation and setup of the PeopleSoft Enterprise CRM Portal Pack and related components.

If you use PeopleSoft Enterprise 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 Enterprise CRM 9.1 from within the Enterprise Portal database, you must set up a link to PeopleSoft Enterprise CRM 9.1 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 My Oracle Support, 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 8.50 PeopleBooks.

---

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**Note.** In addition, consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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### Task 11-1: Granting PeopleSoft Portal Pack Personalization

This section discusses:

- Updating the Homepage Personalization Permissions
- Adding the Portal User Role to the User IDs

## Task 11-1-1: Updating the Homepage Personalization Permissions

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 9.1 database.
2. Open the PeopleSoft Data Mover script `<PS_HOME>\scripts\ PORTAL_HP_PERS.DMS`.
3. Run this script against the PeopleSoft CRM 9.1 database.
4. Close PeopleSoft Data Mover.

## Task 11-1-2: 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 9.1 database.
2. Open the PeopleSoft Data Mover script `<PS_HOME>\scripts\ PORTAL_ADD_ROLE.DMS`.
3. Run this script against the PeopleSoft CRM 9.1 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.

---

---

## Task 11-2: Accessing PeopleSoft CRM Through the Enterprise Portal

The installation phase of your PeopleSoft application should only entail setting up a single link to the application content provider, PeopleSoft CRM 9.1.

---

**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 My Oracle Support. 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, My Oracle Support.

---

**Note.** When you begin your implementation phase, refer to the Enterprise Portal 8.4x - Implementing Navigation and Portal Packs document on My Oracle Support. 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, My Oracle Support.

## CHAPTER 12

# Installing the PeopleSoft Advanced Configurator 9.1

This chapter discusses:

- Understanding the PeopleSoft Advanced Configurator 9.1
- Reviewing the Installation Requirements
- Installing the Oracle 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 Sun Solaris
- Installing the Oracle WebLogic Application Server on Sun Solaris
- Installing the PeopleSoft Advanced Configurator Server on Sun Solaris
- Starting and Configuring the PeopleSoft Advanced Configurator Server on Sun Solaris
- Installing the PeopleSoft Visual Modeler
- Installing for Integration with PeopleSoft Order Capture
- Installing Multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows (Optional)

---

## Understanding the PeopleSoft Advanced Configurator 9.1

This chapter provides instructions for the installation and set up of the PeopleSoft Advanced Configurator 9.1 Server and related components.

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**Note.** Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.50 Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks.

---

---

**Note.** In addition, you should consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

---

**Note.** Before you begin your installation of the PeopleSoft Advanced Configurator, consult the *PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide* available on My Oracle Support for the latest supported platform information.

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See *PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements*, “*Defining Advanced Configurator Requirements*.”

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## Reviewing the Installation Requirements

This section discusses:

- Prerequisites
- Reviewing the PeopleSoft Advanced Configurator Installation Process
- Understanding PeopleSoft Visual Modeler and the PeopleSoft Advanced Configurator Server

### Prerequisites

Before you begin the PeopleSoft Advanced Configurator installation, thoroughly review the PeopleSoft CRM 9.1 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 Advanced Configurator software. PeopleSoft Advanced Configurator supports only a portion of the operating systems, databases and web servers that PeopleSoft PeopleTools supports.

See *PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements*, “*Defining Advanced Configurator Requirements*.”

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**Note.** The PeopleSoft Advanced Configurator supports only a subset of the operating systems, DataBases, WebServers, and so on that PeopleSoft PeopleTools supports.

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**Note.** The PeopleSoft Advanced Configurator server should be installed on it’s own, dedicated physical server and not one that is shared with PeopleSoft Pure Internet Architecture, PeopleSoft Integration Broker, or any PeopleSoft servers (for example, any PeopleSoft PeopleTools-based servers).

---

## Reviewing the PeopleSoft Advanced Configurator Installation Process

The following are general steps intended for reference only. They summarize the procedures for properly installing PeopleSoft 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 Sun Solaris operating systems:

1. Install the Oracle WebLogic Server 10.3.1 (hereafter known as WebLogic Server 10.3).

---

**Note.** The Java Development Kit (JDK) 1.6.0\_11 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. After it is downloaded, you will need to modify the execution PATH environment variable to ensure that the directory containing the java 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 PeopleSoft Advanced Configurator server.
4. Configure Oracle WebLogic Server 10.3.1 and the PeopleSoft 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.

Uninstalling PeopleSoft Advanced Configurator components from your system requires that you follow a specific order of removal:

1. Remove PeopleSoft Advanced Configurator PeopleSoft Visual Modeler, if it is installed on the same machine as the Server.
2. Remove PeopleSoft Advanced Configurator Server.
3. Remove Oracle WebLogic Server 10.3.1.

## Understanding PeopleSoft Visual Modeler and the 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 Advanced Configurator Server. Thus, you can install them either on the same system or on different systems in a distributed network environment.

The PeopleSoft 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 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 12-1: Installing the Oracle WebLogic Application Server on Microsoft Windows

This section discusses:

- Installing the Oracle WebLogic Server
- Running the Oracle WebLogic Server as a Service
- Changing the Oracle WebLogic Server System Password

- Uninstalling the Oracle WebLogic Server

## Task 12-1-1: Installing the Oracle WebLogic Server

This section describes the installation process of the Oracle WebLogic Application Server. The Oracle WebLogic Server 10.3.1 software that is provided with this release includes and installs Sun JDK 1.6.0\_11.

To install the Oracle WebLogic Application Server:

1. Log in as Microsoft Windows Server Administrator.
2. Insert the PeopleSoft Enterprise CRM WebLogic CD-ROM and install the file `server103_win32.exe`. You can retrieve the PeopleSoft CRM WebLogic files from your E-Delivery download.

3. Select a location for the Oracle WebLogic Server.

You should run PeopleSoft Advanced Configurator on a different instance of the Oracle WebLogic Server than other PeopleSoft applications. Thus, if the Oracle WebLogic Server 10.3.1 is already installed on this server, you should install another copy of the Oracle WebLogic Server to a different directory to accommodate PeopleSoft Advanced Configurator.

4. After you complete the installation, run Quick Start.

The sample Oracle 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.** PeopleSoft PeopleTools and PeopleSoft Advanced Configurator Server must run on separate instances of the Oracle WebLogic Server 10.3.1. Multiple instances of the Oracle WebLogic Server can be run concurrently on the same server as long as they are all listening on different ports.

---

## Task 12-1-2: Running the Oracle WebLogic Server as a Service

The PeopleSoft Advanced Configurator Server is not affected, whether or not you run the Oracle WebLogic Server 10.3.1 as a Microsoft Windows Service on your system. However, if you do run it as a service, you must stop the PeopleSoft Advanced Configurator Server in the Microsoft Windows Services window before you attempt to uninstall.

---

**Important!** Oracle recommends that you do *not* set up the Oracle WebLogic default Application Server (@port #7001) to run as a service. Instead, set up the PeopleSoft Advanced Configurator Server to run as a service.

---

After you install the Oracle WebLogic Server 10.3.1, the directory locations are mapped to variables that are used by the PeopleSoft Advanced Configurator Server and PeopleSoft Visual Modeler. These directory locations are important to the proper installation and operation of the PeopleSoft Advanced Configurator Server.

Do *not* move the Oracle WebLogic Server 10.3.1 to another directory. If you must change the location, uninstall and then reinstall, rather than moving the Oracle WebLogic Server directories.

## Task 12-1-3: Changing the Oracle WebLogic Server System Password

Oracle recommends that you install the PeopleSoft Advanced Configurator Server before you change the Oracle WebLogic Server password.

See "Installing the PeopleSoft Advanced Configurator Server."

## Task 12-1-4: Uninstalling the Oracle WebLogic Server

To uninstall the Oracle WebLogic Server, use the uninstall utility that is provided:

1. Select Start, Programs, Oracle WebLogic, Uninstall Oracle WebLogic.
2. Uninstall Oracle WebLogic Server 10.3.1.

---

## Task 12-2: Installing the PeopleSoft Advanced Configurator Server on Microsoft Windows

This section discusses:

- Installing the PeopleSoft Advanced Configurator Server
- Changing the Oracle WebLogic Server System Password
- Uninstalling the PeopleSoft Configuration Server

### Task 12-2-1: Installing the PeopleSoft Advanced Configurator Server

This section describes how to install the PeopleSoft Advanced Configurator Server on a Microsoft (MS) Windows Server system.

The installation of PeopleSoft Advanced Configurator Server includes the optional creation of database tables as necessary. However, the database and connectivity must already exist. The database can be the PeopleSoft CRM database if you are installing PeopleSoft Advanced Configurator for use with other PeopleSoft CRM applications.

PeopleSoft Advanced Configurator Server installation allows you to specify the port number of the PeopleSoft CRM database if it is different from the default setting. Check with your database administrator (DBA) if you are not sure of the appropriate port setting.

---

**Note.** Before proceeding with PeopleSoft Advanced Configurator server installation, install the custom PeopleSoft Advanced Configurator database or PeopleSoft CRM database. Ensure that the database has a user login with permission to create tables.

---

To install the PeopleSoft Advanced Configurator Server:

1. If you intend on using Microsoft SQL Server as a database server, then you should obtain the appropriate Microsoft JDBC driver (sqljdbc4.jar) from Microsoft's database installation software now.

Copy the jar file to a directory that you will remember, for example C:\temp, as you will need this file later in the installation process.

2. If you have not already installed the Oracle WebLogic Server, do so now.

See Installing the Oracle WebLogic Application Server.

---

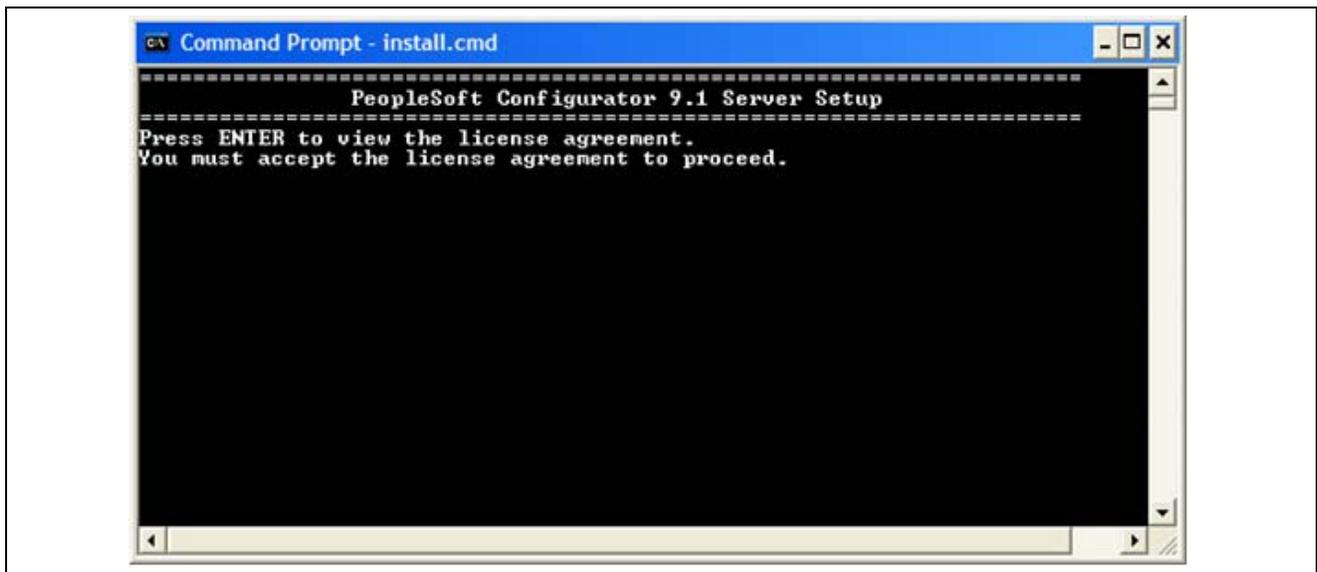
**Note.** If you are installing the PeopleSoft Advanced Configurator WebLogic Server in addition to an existing Oracle WebLogic Server that is used for another application, you must install it in a separate location. For example: `\bea_cfg\` rather than the default `\bea`.

---

3. Open a command prompt and navigate to:  
`<PS_HOME>\setup\AdvancedConfigurator\Server\Windows`
4. Enter this command:

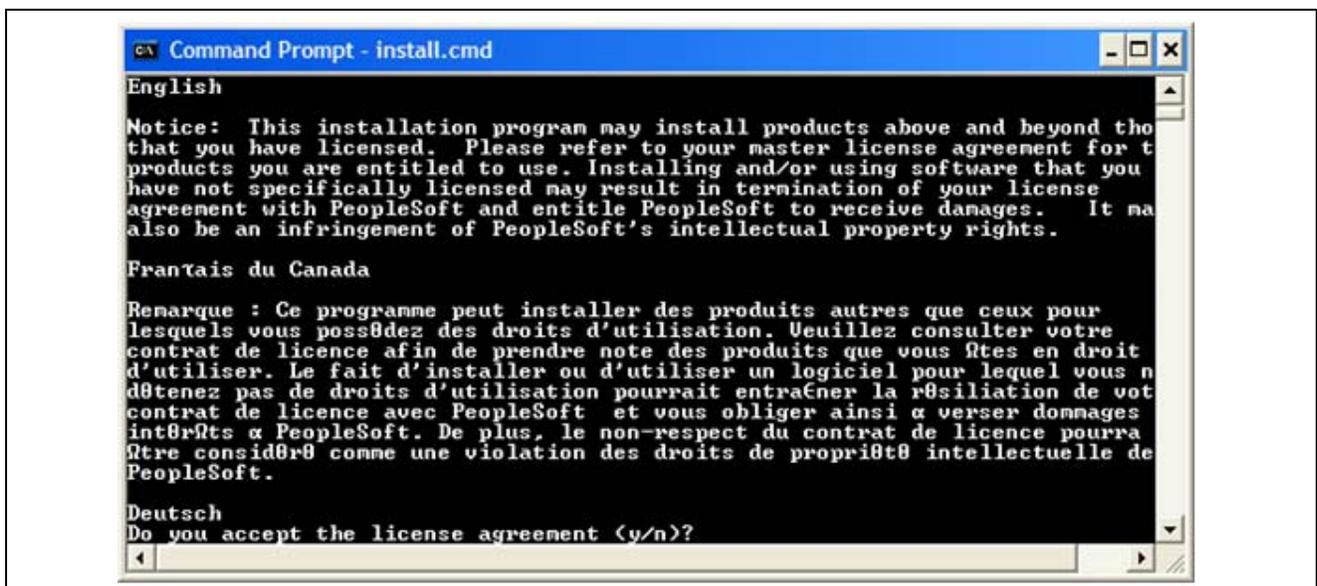
```
install.cmd
```

The PeopleSoft Configurator Server Setup command window appears, as shown in the following example:



Command Window - PeopleSoft Configurator 9.1 Server Setup window

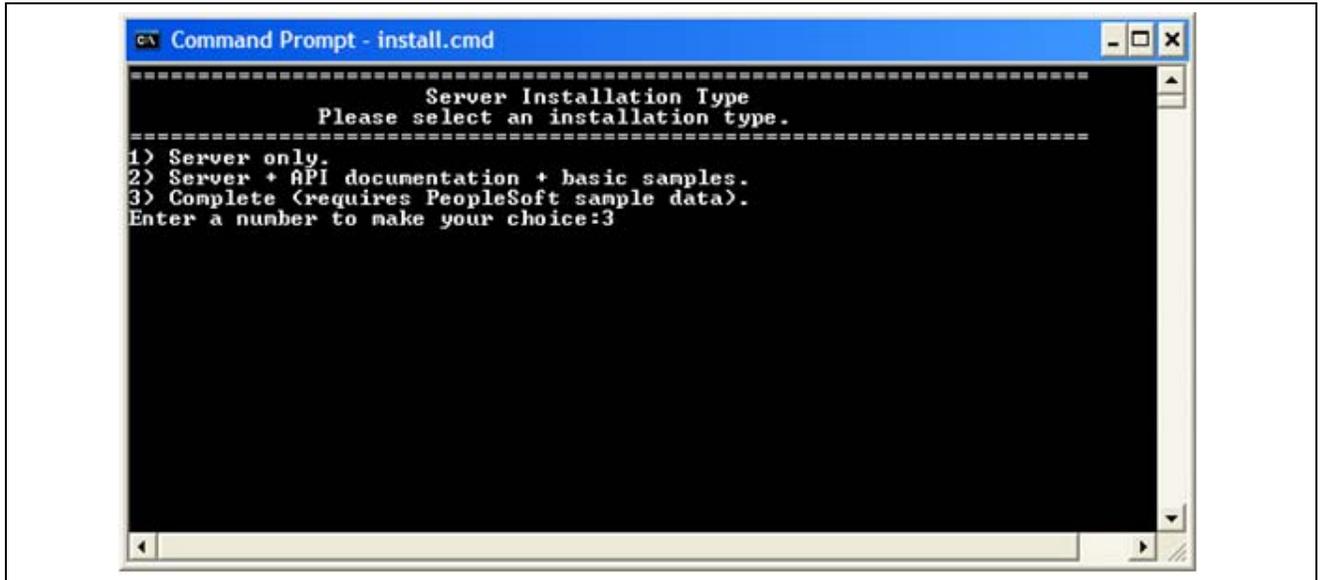
5. On your keyboard, press the Enter key to view the license agreement, as shown in the following example:



Command Window - PeopleSoft Configurator 9.1 License Agreement window

6. Enter *y* to accept the license agreement.

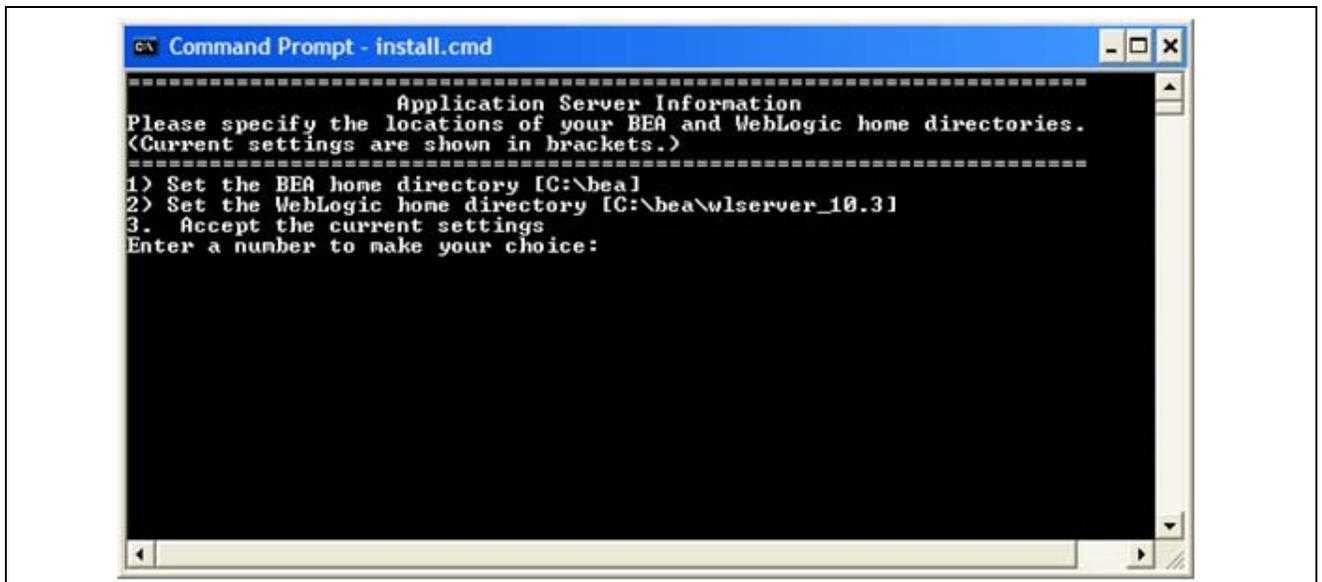
The Server Installation Type window appears, as shown in the following example:



Command Window - Server Installation Type window

7. Select the option that allows the appropriate level of access to the PeopleSoft Advanced Configurator Server to anyone who uses the machine, or to anyone who uses the system ID that you used to log in.

The Application Server Information window appears, as shown in the following example:



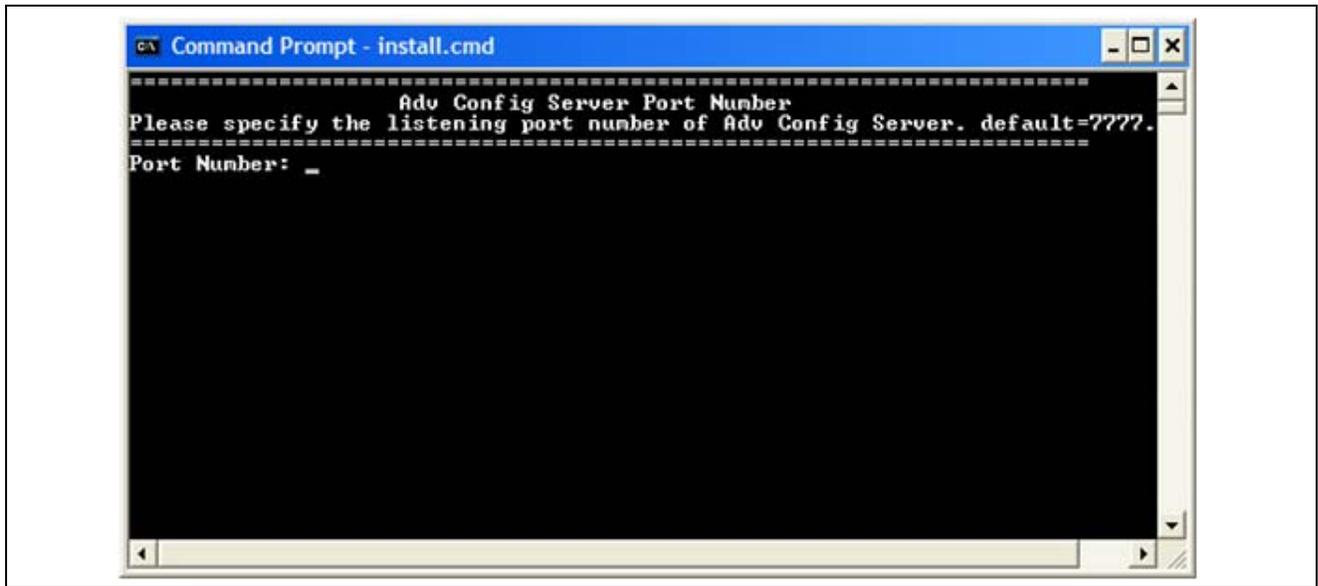
Command Window - Application Server Information window

8. The install program searches for the BEA home directory and fills in the found directory.

If you are using another directory for the Oracle WebLogic 10.3.1 server, or if you are using an existing Oracle WebLogic 10.3.1 installation with another application, enter its location in this Application Server Information options window.

9. Accept the BEA home and Weblogic HOME settings.

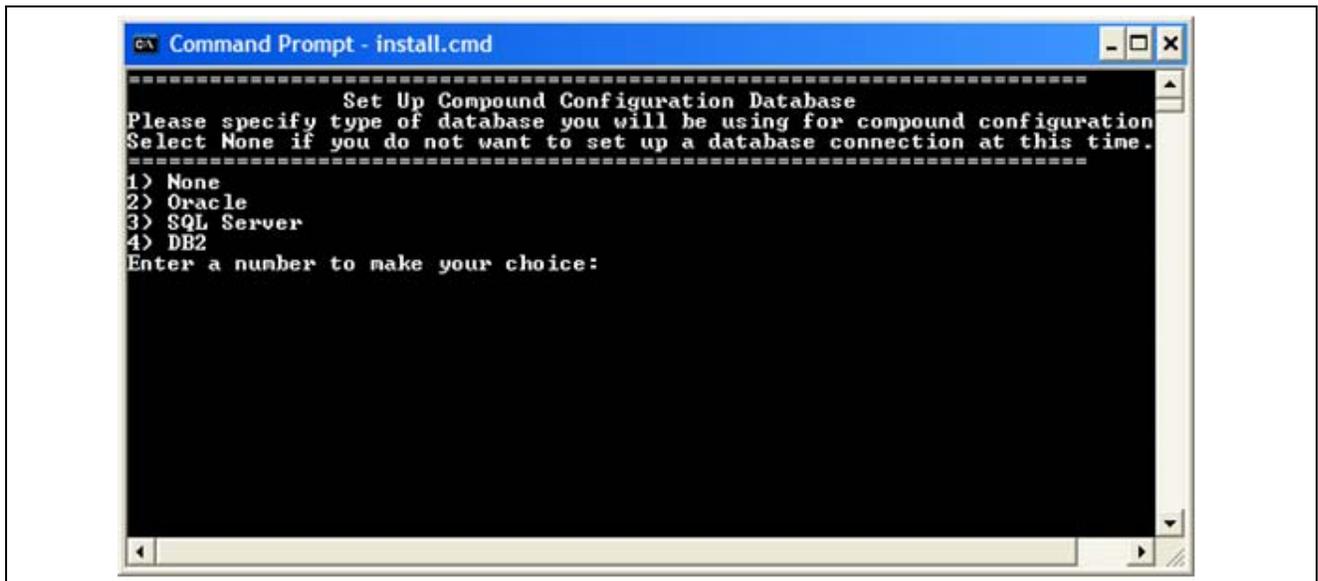
The Adv Config Server Port Number window appears, as shown in the following example:



Command Window - Adv Config Server Port Number window

10. Accept the default 7777 by pressing Enter, or enter your port number.

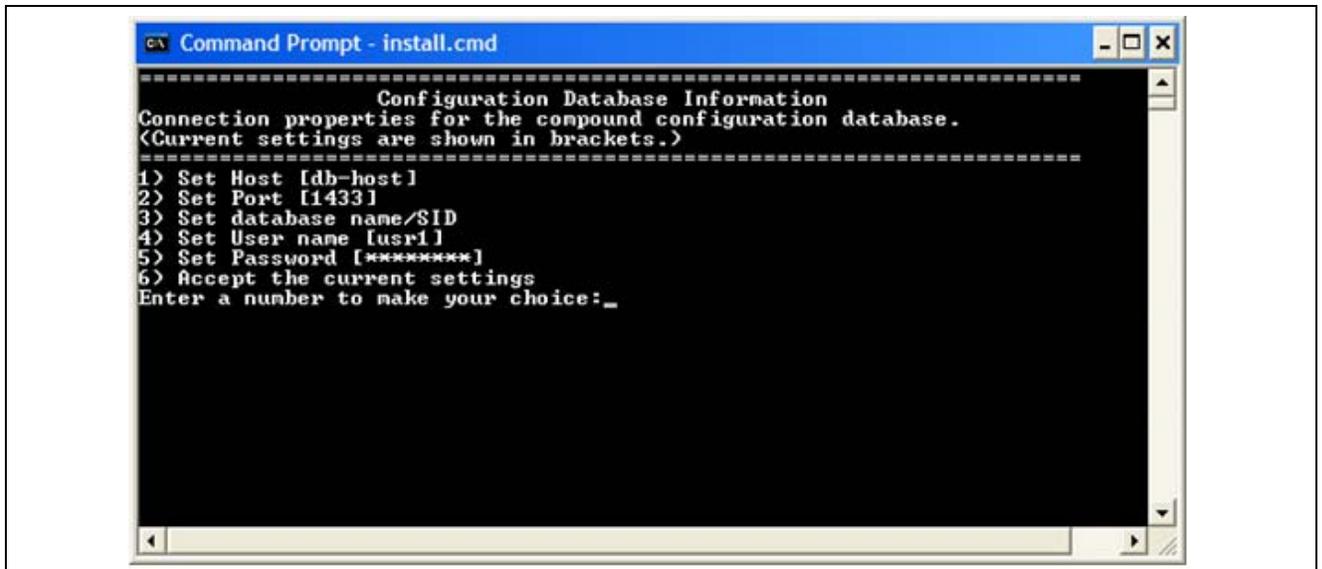
The Configuration Database window appears, as shown in the following example:



Command Window - Set Up Compound Configuration Database window

11. Select the database that you are running.

The Configuration Database Information - Connection Properties option window appears, as shown in the following example:

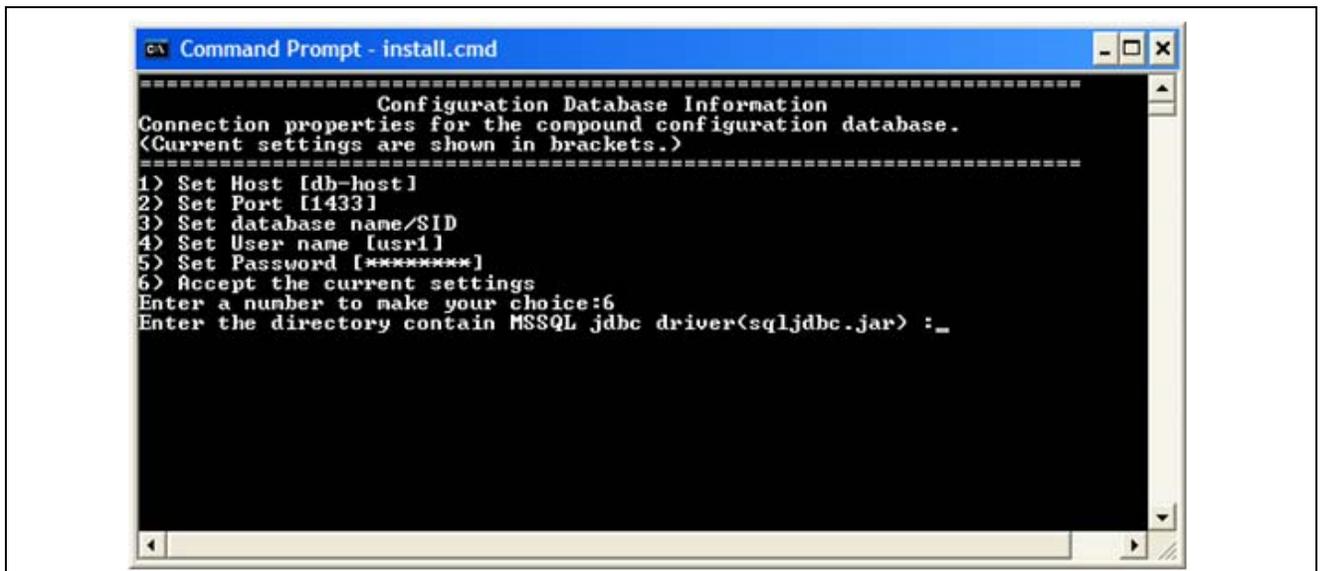


Command Window - Configuration Database Information window

12. Enter the database information for the database that you intend to use for configuration and model data.

*For 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 obtained earlier.

The following example of the Configuration Database Information window shows the MSSQL directory prompt:

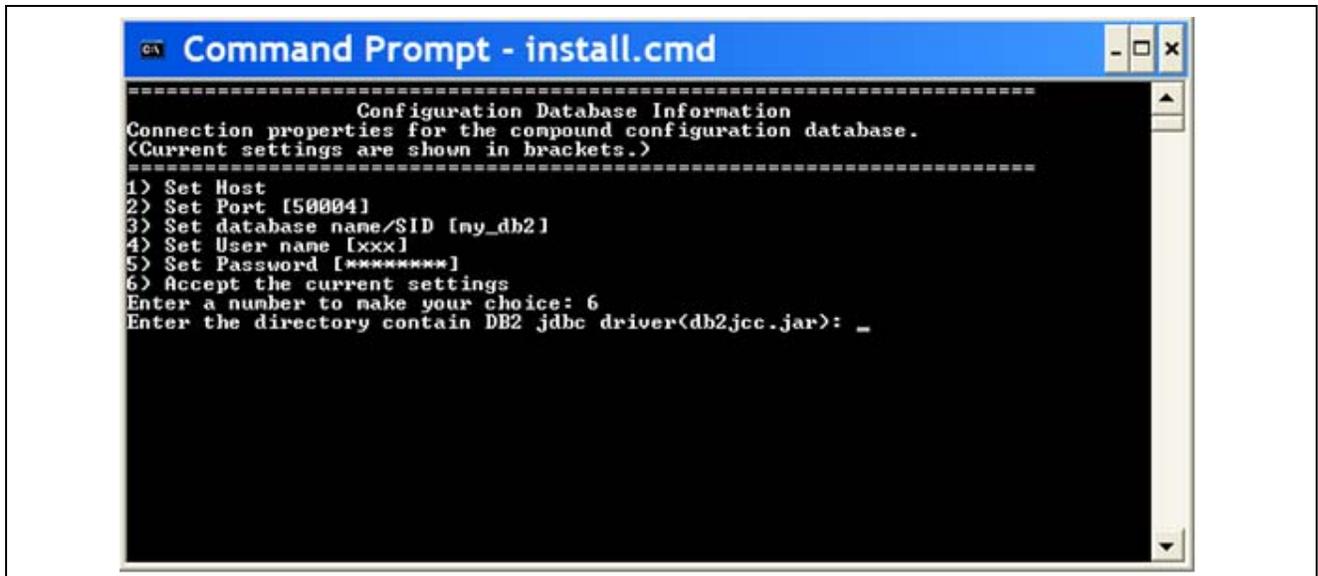


Command Window - Configuration Database Information window

*For DB2 only:* If DB2 is your database of choice, the install program will prompt for the location of the IBM DB2 jdbc driver file (db2jcc.jar).

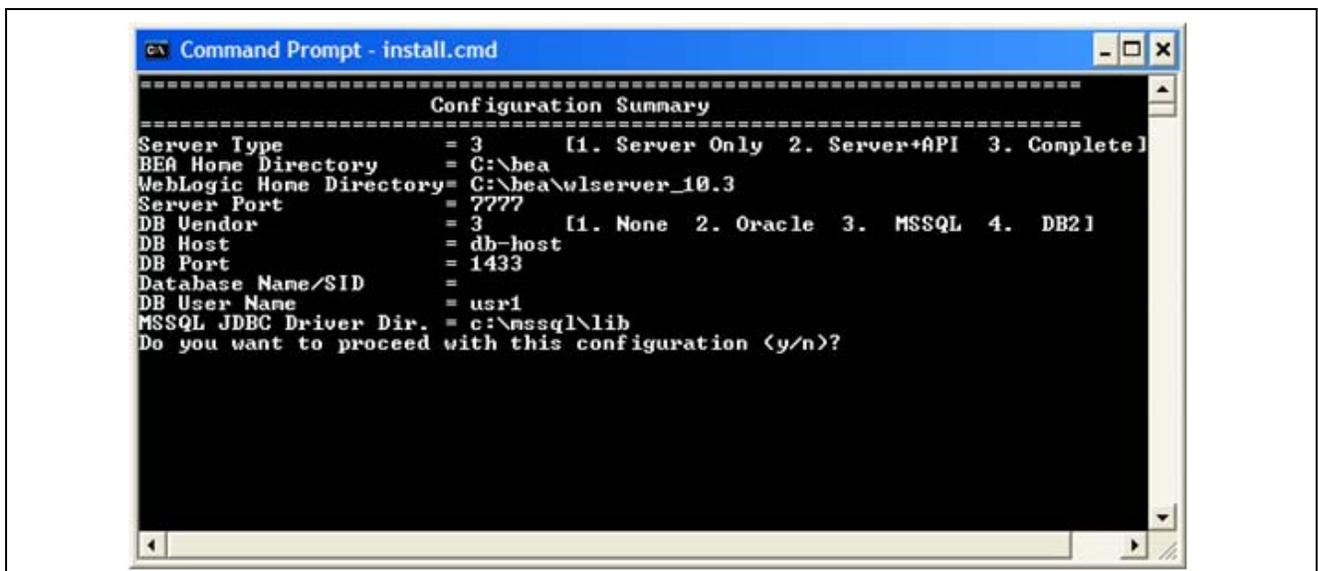
The db2jcc.jar file is located in the java directory (java 12 on some installs) under the DB2/LUW home directory.

For DB2 only - Command window prompts for the IBM DB2 jdbc driver file location, as shown in the following example:



For DB2 only - Command window prompts for the IBM DB2 jdbc driver file location

The Configuration Summary page appears, as shown in the following example:



Command Window - Configuration Summary window and selections

13. Review the values. Enter *y* to complete the installation, or *n* to abort the installation.

It is not necessary to restart the system when the installation is complete.

14. *For DB2 only:* After installation completes, you must double-click *propupdate.cmd* to reset the Adv Cfg (Advanced Configurator) tables:

- a. Navigate to `<WEBLOGIC_HOME>\config\CalicoDomain\install directory`
- b. Edit the *install.properties* file as follows:

Change the line `netadv.db.replace=false` to `netadv.db.replace=true`.

- c. Double-click the *propupdate.cmd* to reset the Adv Cfg (Advanced Configurator) tables.

The PeopleSoft Advanced Configurator Server installation creates the following directories:

- Directories and files found in:  
`<WEBLOGIC_HOME>\config\CalicoDomain\applications\CalicoApp\Web-inf\`
  - `config\`
  - `dtd\`
  - `lib\`
  - `logs\`
  - `models\`
  - `sql\`
  - `xsd\`
  - `web.xml`
  - `weblogic.xml`
- Installation-specific files found in:  
`<WEBLOGIC_HOME>\config\CalicoDomain\install\`
  - `install.jar`
  - `install.properties`
  - `install.log`
  - `propupdate.cmd`
- The file `install.log` contains information about setup during installation (including error messages if any errors occurred).  

Your 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 installation and reconfiguration of the Oracle WebLogic Server 10.3.1 is with a server name other than `myserver`, you must update the `t3servername` property in `LEDBAcc.properties` to reflect the actual server name.

The `LEDBAcc.properties` file is located at: `<WEBLOGIC_HOME>\config\CalicoDomain\applications\CalicoApp\Web-inf\config`.

After the PeopleSoft Advanced Configurator server installs, you can change the default Oracle WebLogic Server system password, as described in the next section.

## Task 12-2-2: Changing the Oracle WebLogic Server System Password

To change the Oracle WebLogic Server system password:

1. Ensure that the PeopleSoft Advanced Configurator is running.  

Alternatively, open a command prompt and change the directory to: `<WEBLOGIC_HOME>\config\CalicoDomain`.

Run `startConfigurator.cmd` with no parameters. The server should start.
2. Go to the Oracle WebLogic Server Management Console by entering this URL in a browser:

*http://<host\_name>:7777/console*

---

**Note.** 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

3. Log in by entering *system* in the User ID field and *<initial password, weblogic>* in the Password field.
4. Select Domain Structure, Compatibility Security, Users, and then select the user *system*.
5. Enter the new password for user *system*.
  - For Old Password, enter *weblogic*.
  - For New Password, enter *<new password>*.
  - For Confirm New Password, enter *<new password>*.
6. Click Save.
7. Stop the PeopleSoft Advanced Configurator Server by running `stopConfigurator.cmd` from the server prompt.
8. Locate `startConfigurator.cmd` and `stopConfigurator.cmd` in *<WEBLOGIC\_HOME>\config\CalicoDomain* and change `set WLS_PW=weblogic` to `set WLS_PW=<the new password>`
9. If you configured the PeopleSoft 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
```

10. Check for the existence of `boot.properties`. By default, this resides in *C:\<WEBLOGIC\_HOME>\config\CalicoDomain\servers\myserver\security*. If the file is present, replace the password value with the unencrypted new password. Note that the password encryptes upon restart of the server.
11. Restart the service from the Control Panel or reboot the system.

### Task 12-2-3: Uninstalling the PeopleSoft Configuration Server

Before you uninstall the PeopleSoft Advanced Configurator Server, you must uninstall PeopleSoft Visual Modeler, if it is present on the server. Use the Control Panel Add/Remove utility to uninstall PeopleSoft Visual Modeler.

To uninstall the PeopleSoft Configuration Server:

1. Stop the PeopleSoft Advanced Configuration Server.
2. Remove the *<WEBLOGIC\_HOME>\config\CalicoDomain* directory.

---

## Task 12-3: Starting and Configuring the PeopleSoft Advanced Configurator Server on Microsoft Windows

This section discusses:

- Understanding How to Start the PeopleSoft Advanced Configurator Server on Microsoft Windows

- Starting the PeopleSoft Advanced Configurator from a Microsoft Command Window
- Installing the PeopleSoft Advanced Configurator as a Microsoft Window Service
- Starting the PeopleSoft Advanced Configurator as a Microsoft Window Service
- Resetting the Port
- Setting the XML Encoding Option (Optional)

## Understanding How to Start the PeopleSoft Advanced Configurator Server on Microsoft Windows

After you install both the Oracle WebLogic Application Server and the PeopleSoft Advanced Configurator Server, you need to start the PeopleSoft Advanced Configurator Server. Starting the PeopleSoft Enterprise Advanced Configurator Server properly sets up the necessary system environment variables for the JDK/JRE, Oracle WebLogic 10.3, and the PeopleSoft Advanced Configurator Server.

You can start the PeopleSoft 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 12-3-1: Starting the PeopleSoft Advanced Configurator from a Microsoft Command Window

After you install both the Oracle WebLogic Server and the PeopleSoft Advanced Configurator, you can start the Configuration Server from a DOS Command Window.

1. Open a command prompt window.
2. At the prompt, change the directory to `C:\<WEBLOGIC_HOME>\config\CalicoDomain`.
3. Run *startConfigurator.cmd* with no parameter, The Configuration Server will start.

### Task 12-3-2: Installing the PeopleSoft Advanced Configurator as a Microsoft Window Service

After you install both the Oracle WebLogic Server and the PeopleSoft Advanced Configurator Server, you can also set up the PeopleSoft Advanced Configurator Server to run as a service.

To set up the PeopleSoft Advanced Configurator Server to run as a service:

1. Open a command prompt window.
2. At the prompt, change the directory to `<WEBLOGIC_HOME>\config\CalicoDomain`. This is the Oracle WebLogic Server directory that contains *startConfigurator.cmd*.
3. Run the *startConfigurator cfgservice* to install the PeopleSoft Advanced Configurator as a Microsoft Window service.
4. Select Start, Settings, Control Panel, Administrative Tools, Services.  
You will see that a new service, PeopleSoft Configurator Server, is installed.

### Task 12-3-3: Starting the PeopleSoft Advanced Configurator as a Microsoft Window Service

To run the PeopleSoft 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:\<WEBLOGIC_HOME>\config\CalicoDomain\startConfigurator remservice`

---

### Task 12-3-4: Resetting the Port

You can specify the port number when installing the PeopleSoft Advanced Configuration Server. After the installation, you can change the port number using the Administration Console.

To change the server port:

1. Open the Oracle WebLogic Server administration console for the Calico Domain:

*http://<host\_name>:7777/console*

---

**Note.** 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

Log in with the user name and password.

2. Select Environment, Servers, MyServer.
3. On the Configuration page, General sub-tab, enter a new value for Listen Port.
4. Click Save.
5. Restart the PeopleSoft Advanced Configurator Server.

### Task 12-3-5: Setting the XML Encoding Option (Optional)

This task is optional. Product configuration data that is 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.** Oracle recommends using the default UTF-8, or changing 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:  
`C:\<WEBLOGIC_HOME>\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
/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 encoding you want 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 PeopleSoft Advanced Configurator Server.

---

## Task 12-4: Installing the PeopleSoft Advanced Configurator on Sun Solaris

This section discusses:

- Understanding the PeopleSoft Advanced Configurator Installation
- Setting Up the Database

### Understanding the PeopleSoft Advanced Configurator Installation

This task provides reference information that is useful before you install this release of the PeopleSoft Advanced Configurator Server.

For information on the minimum hardware, software, database, and client browser requirements that your system requires to install this release on a Sun Solaris system, refer to the PeopleSoft CRM Hardware and Software Requirements guide.

See *PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide*.

---

**Note.** Oracle's product load order requires that the Oracle WebLogic Server 10.3.1 and the PeopleSoft Advanced Configurator Server are loaded before you apply any further Oracle WebLogic Server Service Packs. The PeopleSoft Advanced Configurator Server may not work or even install properly if you do not follow this load order.

---

### Task 12-4-1: Setting Up the Database

If you plan to develop or deploy a compound model, set up the database for that before you install the PeopleSoft Advanced Configurator Server. However, if you only need a database for external model data, you can set it up later.

---

**Note.** PeopleSoft Advanced Configurator supports the UNICODE character set by default. See the task *Setting the XML Encoding Option* for information on how to specify other character sets.

---

The database configuration information in this section is general and assumes that you have already identified the type of database configuration that you need. If not, you must contact your DBA for more information before installing and configuring your Oracle database and before installing the PeopleSoft Advanced Configurator Server.

---

**Note.** This guide is not intended to replace the knowledge or assistance of an experienced Oracle DBA.

---

### *Database Server Requirements*

The database server can be a different system than the one where the PeopleSoft Advanced Configurator Server components are installed.

The database server that you use with the PeopleSoft 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 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 Advanced Configurator Server installation.

---

## **Task 12-5: Installing the Oracle WebLogic Application Server on Sun Solaris**

This section discusses:

- Installing the Oracle WebLogic Application Server 10.3.1
- Uninstalling the Oracle WebLogic Server

### **Task 12-5-1: Installing the Oracle WebLogic Application Server 10.3.1**

To install the Oracle WebLogic Server 10.3.1 on Sun Solaris:

1. Ensure that you have created an Oracle WebLogic Server user account (the default user is *weblogic*), and verify that you can log on as the Oracle WebLogic Server user, before you attempt to install Oracle WebLogic Server 10.3.1.

2. Ensure that you have created a group for the Oracle WebLogic Server user (the default group is *weblogic*) and set permissions for that group.

---

**Note.** Record the user name and group permissions that you use during setup. You may need to refer to them when you install the PeopleSoft Advanced Configurator Server.

---

3. Change directory to the AppSrvr/Solaris directory on the temp directory created in the task *Installing the PeopleSoft 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 install the Oracle WebLogic Server 10.3.1 for the PeopleSoft Advanced Configurator Server on your system, all of their directory locations are mapped to variables that are used by the PeopleSoft Advanced Configurator Server. These directory locations are important for proper installation and operation of the PeopleSoft Advanced Configurator Server.

After the PeopleSoft Advanced Configurator Server is up and running, do *not* move Sun JDK, JRE, or the Oracle WebLogic Server files to another directory location. If you do, you must reinstall the PeopleSoft Advanced Configurator Server.

## Task 12-5-2: Uninstalling the Oracle WebLogic Server

To uninstall the Oracle WebLogic Server, do *one* of the following:

- Remove the entire bea directory, if Oracle WebLogic is the only Oracle/BEA product that you have installed:

```
rm -r $HOME/bea
```

- Use the Oracle WebLogic Server uninstall utility that is provided.

---

## Task 12-6: Installing the PeopleSoft Advanced Configurator Server on Sun Solaris

This section discusses:

- Understanding the PeopleSoft Configurator Server Installation on Sun Solaris
- Installing the PeopleSoft Configurator Server on Sun Solaris
- Changing the Oracle WebLogic Server System Password
- Uninstalling the PeopleSoft Advanced Configurator Server

### Understanding the PeopleSoft Configurator Server Installation on Sun Solaris

This section describes the process for installing the PeopleSoft Advanced Configurator Server on a Sun Solaris system.

The installation of the PeopleSoft Advanced Configurator Server includes the optional creation of database tables. However, the database and connectivity must already exist. The database can be the PeopleSoft CRM database if you are installing with other PeopleSoft CRM applications.

The PeopleSoft Advanced Configurator Server installation allows you to specify the port number of the PeopleSoft 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 PeopleSoft Advanced Configurator Server installation, install the custom PeopleSoft Advanced Configurator database or PeopleSoft CRM database. Ensure that the database has a user login with permission to create tables.

---

## Task 12-6-1: Installing the PeopleSoft Configurator Server on Sun Solaris

To install the PeopleSoft Advanced Configurator server on Sun Solaris:

1. If you intend on using Microsoft SQL Server as a database server then you should obtain the appropriate Microsoft JDBC driver (sqljdbc4.jar) from Microsoft's database installation software now. Copy the jar file to a directory that you will remember, for example /temp, as you will need this file later in the installation process.
2. If the Oracle WebLogic Server 10.3.1 is not yet installed on the system, do so now before proceeding, see the task *Installing the Oracle WebLogic Application Server on Sun Solaris*, that appeared earlier in this chapter.

See "Installing the PeopleSoft Advanced Configurator 9.1," Installing the Oracle WebLogic Application Server on Sun Solaris 9.

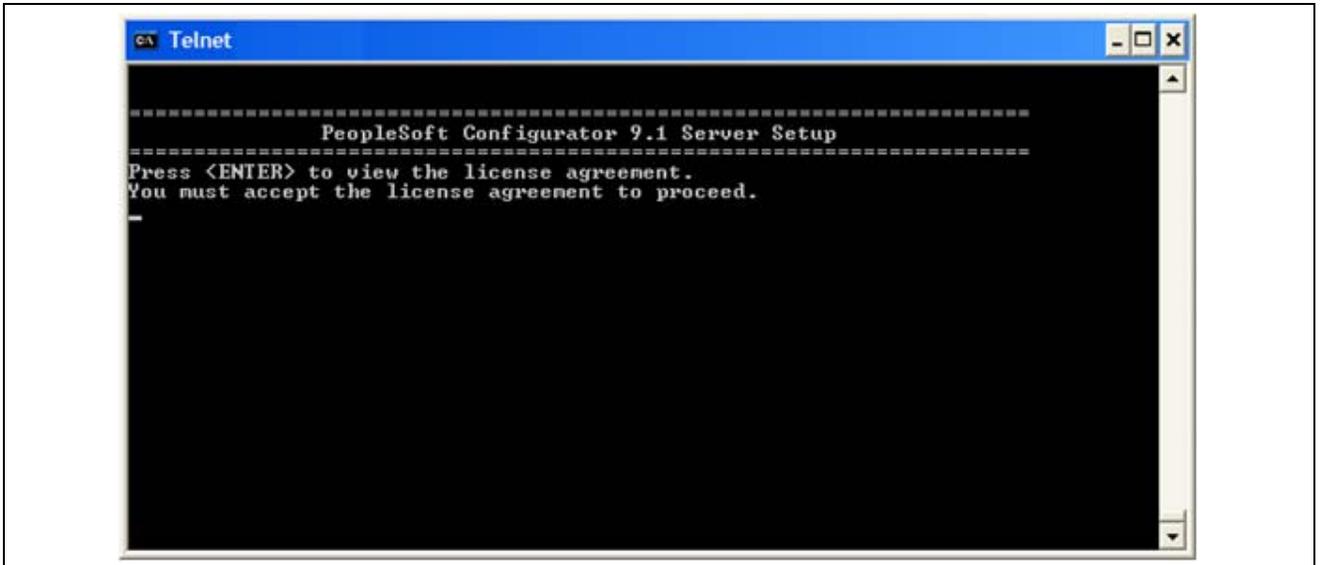
---

**Warning!** Do *not* install the PeopleSoft Advanced Configurator Server into the PeopleSoft PeopleTools Oracle WebLogic Application Server.

---

3. Navigate to <PS\_HOME>/setup/AdvancedConfigurator/Server/Solaris to run the Configurator server script, install.sh.
4. Enter the command: `install.sh`

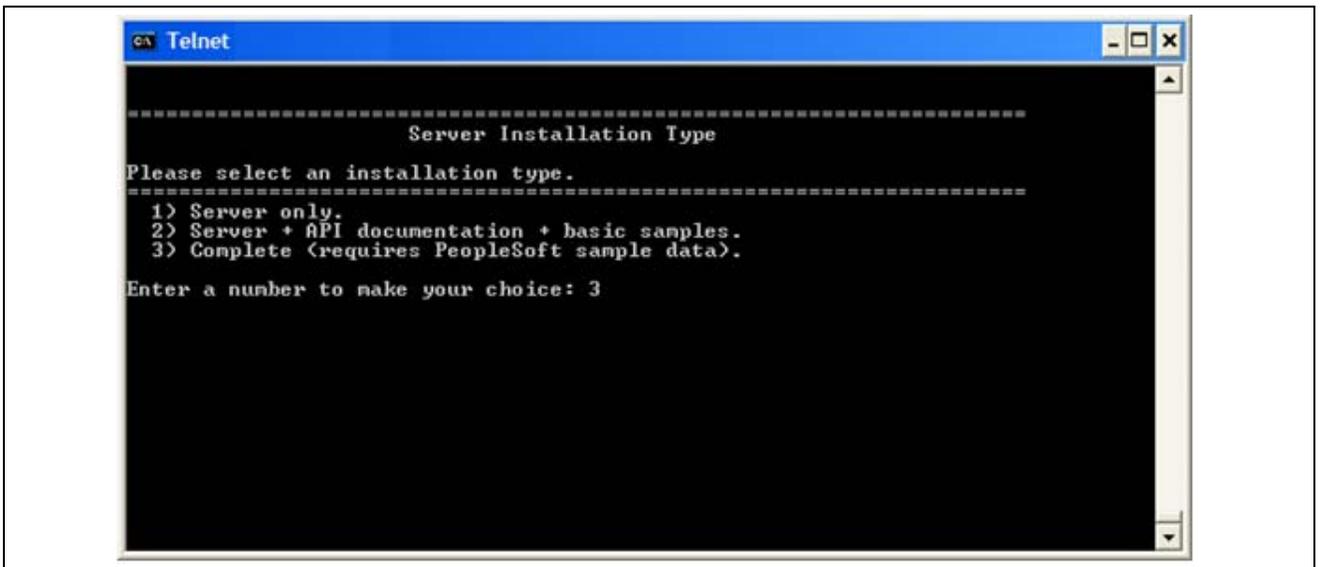
The PeopleSoft Configurator Server Setup window appears, as shown in the following example:



PeopleSoft Configurator 9.1 Server Setup window

5. On your keyboard, press the Enter key to view the license agreement.
6. Enter y to accept the license agreement.

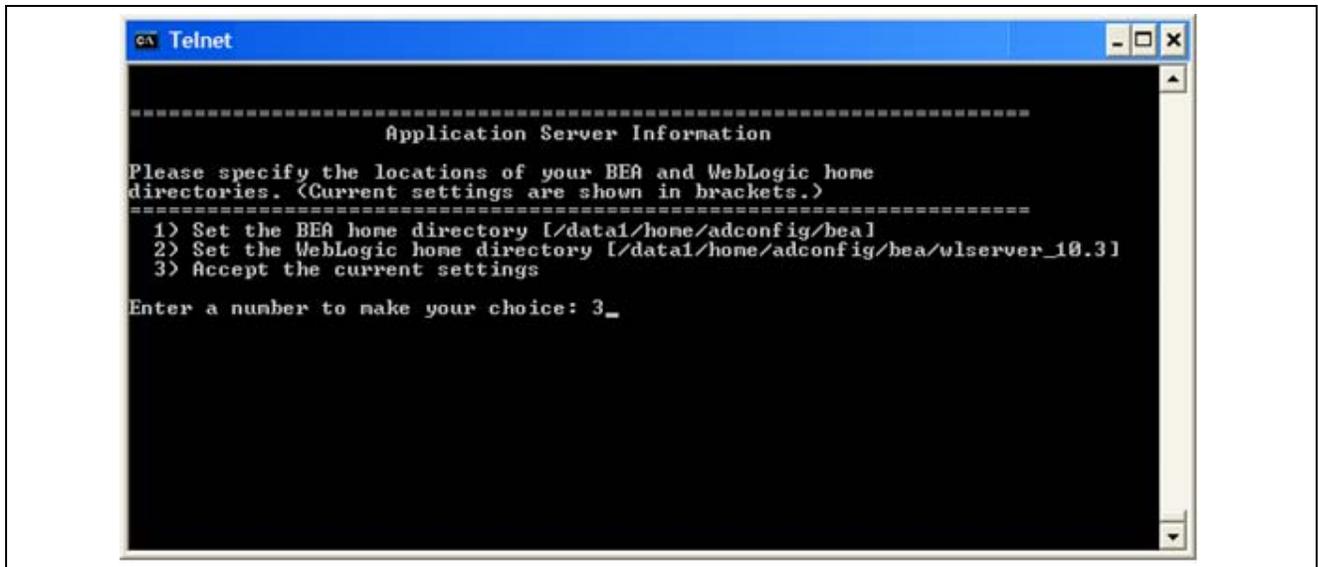
The Server Installation Type window appears, as shown in the following example:



Server Installation Type option window

7. Select the option that allows the appropriate level of access to the PeopleSoft Advanced Configurator Server to anyone who uses the machine, or to anyone who uses the system ID that you used to log in.

The Application Server Information window appears, as shown in the following example:



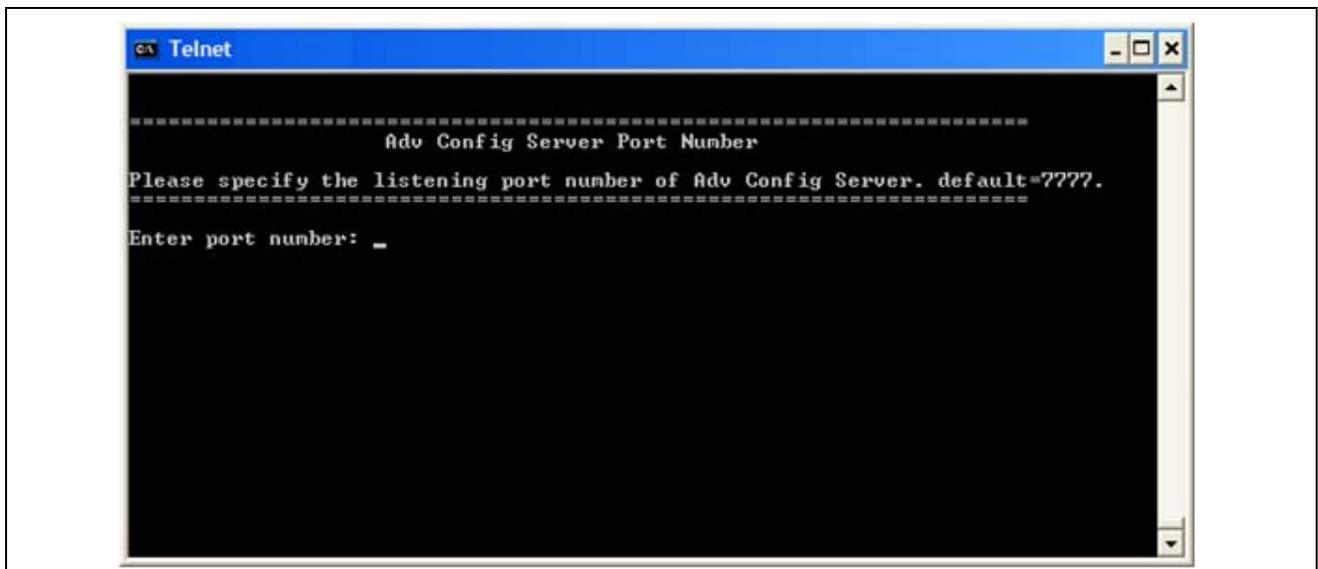
Application Server Information - Home directory option window

8. The install program searches for the BEA home directory and fills in the found directory.

If you are using another directory for the Oracle WebLogic 10.3.1 Server, or if you are using an existing Oracle WebLogic 10.3.1 installation with another application, enter the location in this Application Server Information options window.

9. Accept the BEA home and Weblogic HOME settings.

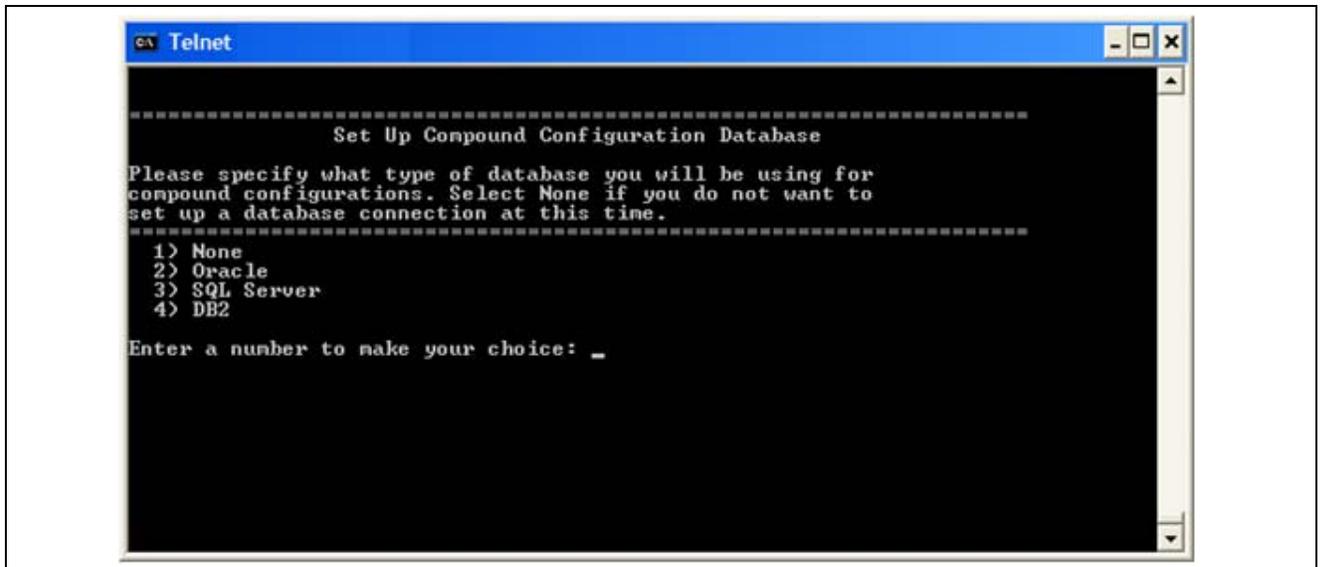
The Adv Config Server Port Number window appears, as shown in the following example:



Adv Config Server Port Number entry window

10. Accept the default 7777 by pressing Enter, or enter your port number.

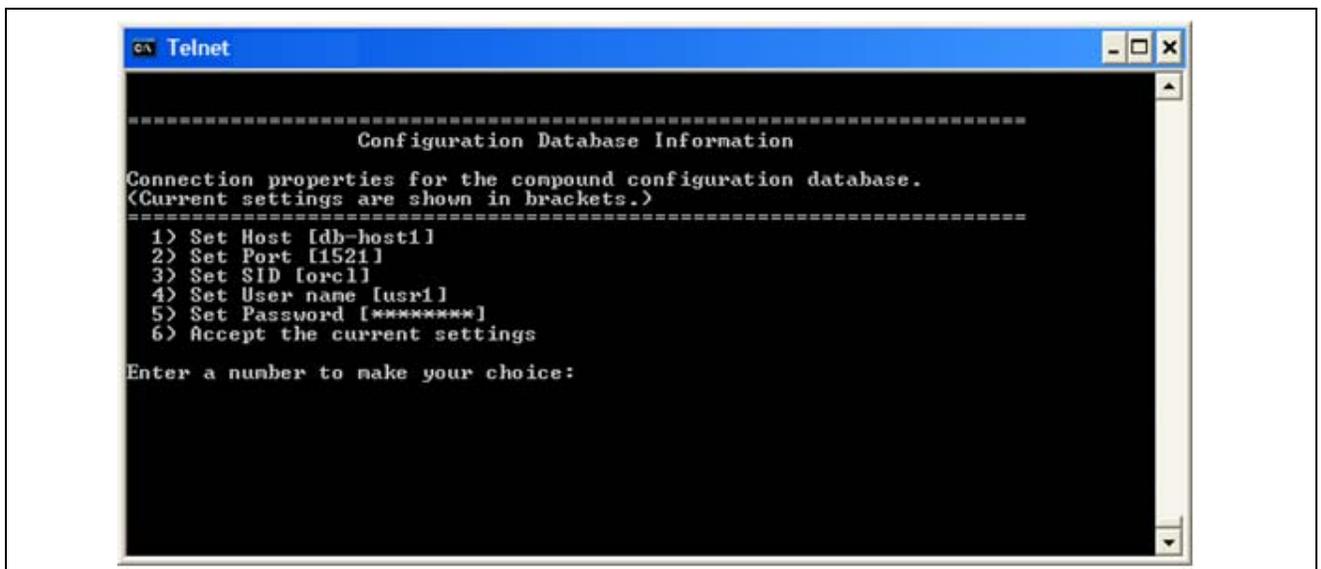
The Set Up Compound Configuration Database - Database Type option window appears, as shown in the following example:



Set Up Compound Configuration Database - Database Type option window

11. Select the database that you are running.

The Configuration Database Information - Connection Properties option window appears, as shown in the following example:

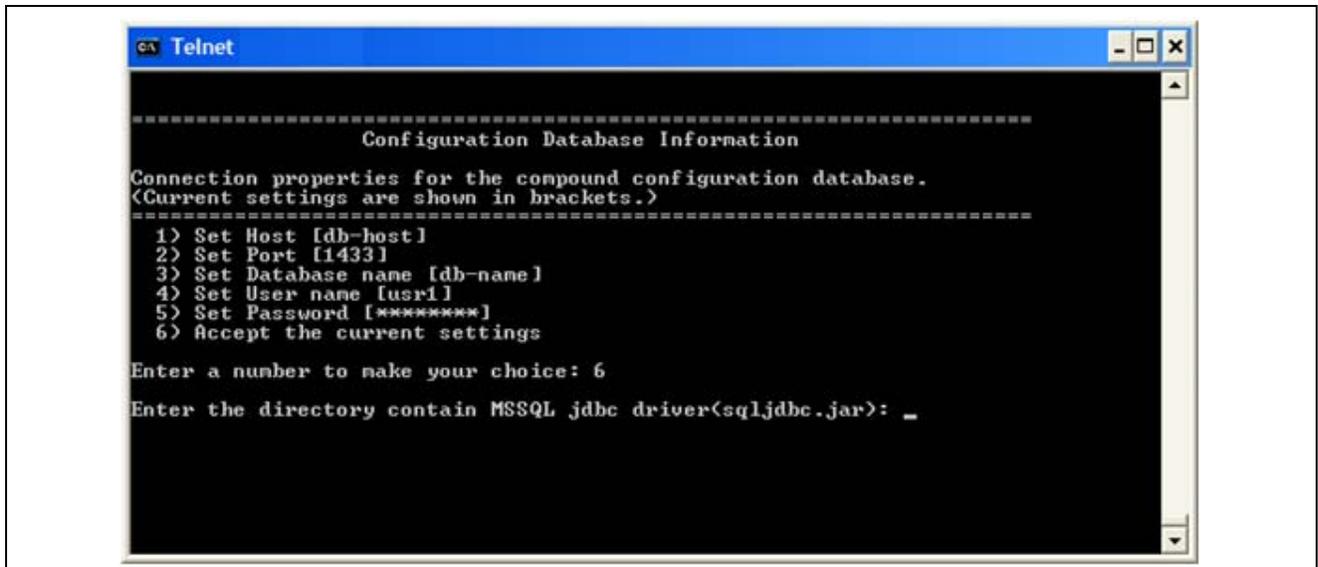


Configuration Database Information - Connection Properties option window

12. Enter the database information for the database that you intend to use for configuration and model data.

*For 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 obtained earlier.

The following example of the Configuration Database Information window shows the MSSQL directory prompt:

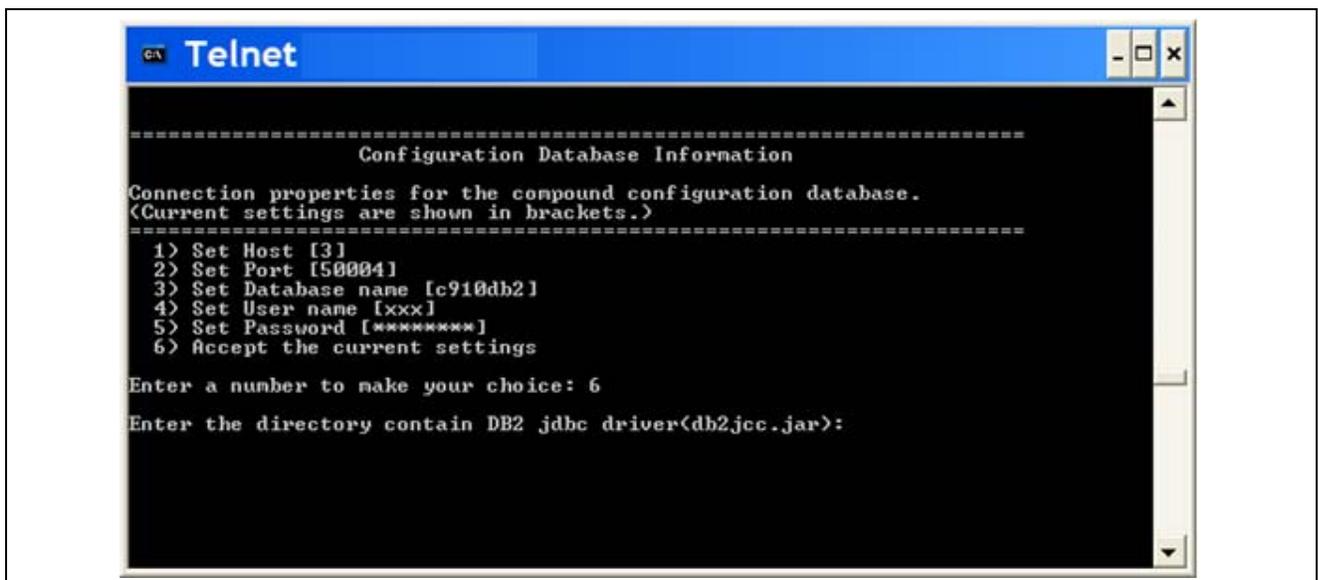


Configuration Database Information window showing the MSSQL directory prompt

*For DB2 only:* If DB2 is your database of choice, the install program will prompt for the location of the IBM DB2 jdbc driver file (db2jcc.jar).

The db2jcc.jar file is located in the java directory (java12 on some installs) under the DB2/LUW home directory.

For DB2 Only - JDBC driver prompt for DB2, a shown in the following example:



For DB2 Only - JDBC driver prompt for DB2

The Configuration Summary window appears, as shown in the following example:

```

=====
Configuration Summary
=====
Server Type           = 3      [1. Server Only 2. Server+API 3. Complete]
BEA Home Directory   = /data1/home/adconfig/bea
WebLogic Home Directory= /data1/home/adconfig/bea/wlserver_10.3
Server Port          = 8888
DB Vendor             = Oracle
DB Host               = db-host1
DB Port               = 1521
Database Name/SID    = orcl
DB User Name         = usrl
Do you want to proceed with this configuration <y/n>?

```

Configuration Summary window

The following is an example of the MSSQL Configuration Summary window:

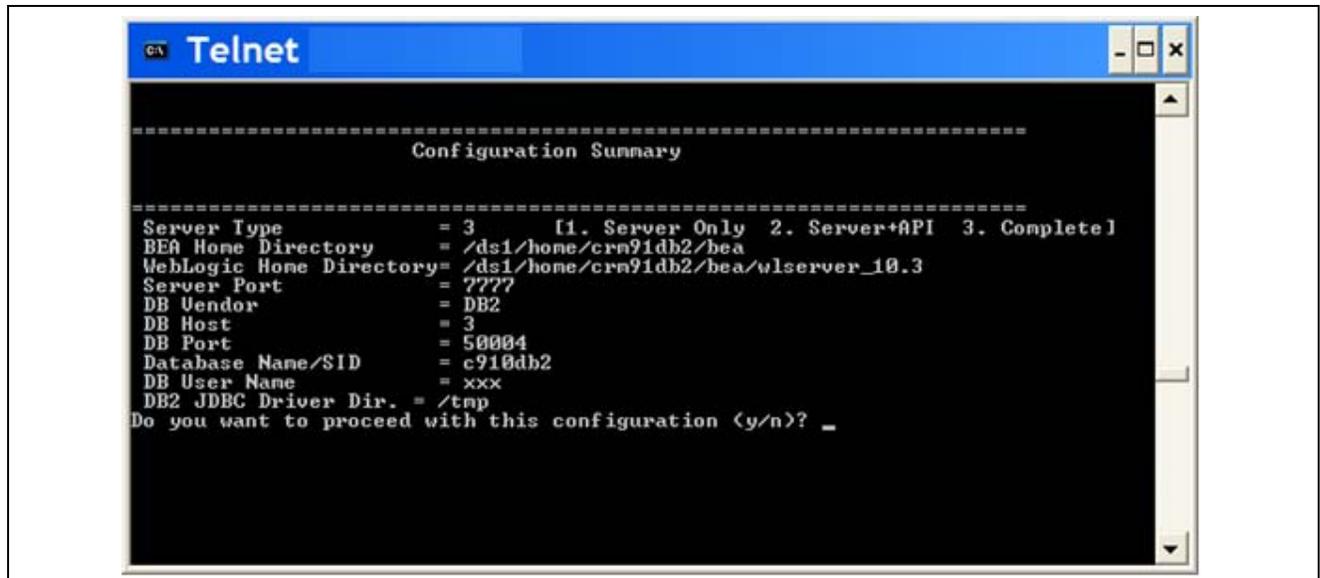
```

=====
Configuration Summary
=====
Server Type           = 3      [1. Server Only 2. Server+API 3. Complete]
BEA Home Directory   = /data1/home/adconfig/bea
WebLogic Home Directory= /data1/home/adconfig/bea/wlserver_10.3
Server Port          = 7777
DB Vendor             = SQLServer
DB Host               = db-host
DB Port               = 1433
Database Name/SID    = db-name
DB User Name         = usrl
MSSQL JDBC Driver Dir. = /mssql/lib
Do you want to proceed with this configuration <y/n>?

```

Example of the MSSQL Configuration Summary window

For DB2 Only - DB2 Summary page, as shown in the following example:



For DB2 Only - DB2 Summary page

---

**Note.** In this release, Oracle WebLogic 10.3.1 installs JDK 1.6.0\_11 in its directory structure. The default path to the JDK is: `/$HOME/boa/jdk160_11`

---

13. Review the values. Enter `y` to complete the installation, or `n` to abort the installation.

It is not necessary to restart the system when the installation is complete.

14. *For DB2 only:* After installation completes, you must:

a. Navigate to `<WEBLOGIC_HOME>/config/CalicoDomain/install` directory.

b. Edit the `install.properties` file as follows:

Change the line `netadv.db.replace=false` to `netadv.db.replace=true`.

c. Run `propupdate.sh` to reset the Adv Cfg (Advanced Configurator) tables.

10 directories and 2 files are found in: `<WEBLOGIC_HOME>\config\CalicoDomain\applications\CalicoApp\Web-inf\`

- config/
- dtd/
- lib/
- logs/
- models/
- namodels/
- nastructures/
- sql/
- structures/
- xsd/
- web.xml
- weblogic.xml

## Task 12-6-2: Changing the Oracle WebLogic Server System Password

Oracle recommends that you change the Oracle WebLogic Server system password for production systems.

To change the default Oracle WebLogic Server system password:

1. Enter the following URL in a browser to open the Oracle WebLogic Server Management Console:  
`http://<host_name>:7777/console`

---

**Note.** 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

2. Log in by entering *system* in the User ID field and *<old WebLogic password>* in the Password field.
3. Select Domain Structure, Compatibility Security, Users, and then select user *system*.
4. Enter the new password for user *system*.

- For Old Password, enter *<old WebLogic system password>* (*weblogic* by default).
- For Confirm New Password, enter *<new WebLogic system password>*.

5. Click Save.
6. Stop the server.
7. Check for the existence of `boot.properties`.

By default, this resides in `<WEBLOGIC_HOME>/config/CalicoDomain`. If the file is present, replace the password value with the unencrypted new password. Note that the password encrypts upon start up of the server.

8. In `startConfigurator.sh` and `stopConfigurator.sh`, change `WLS_PW=<old WebLogic password>` to `WLS_PW=<new password>`.
9. Restart the Configurator server.

## Task 12-6-3: Uninstalling the PeopleSoft Advanced Configurator Server

To uninstall the PeopleSoft Advanced Configurator Server:

1. Stop the PeopleSoft Advanced Configurator server.
2. Remove the `<WEBLOGIC_HOME>/config/CalicoDomain` directory.

---

## Task 12-7: Starting and Configuring the PeopleSoft Advanced Configurator Server on Sun Solaris

This section discusses:

- Understanding the PeopleSoft Advanced Configurator Server Initiation on Sun Solaris
- Starting PeopleSoft Advanced Configurator Server from the Command Line

- Stopping the PeopleSoft Advanced Configurator Server from the Command Line
- Automatically Starting the PeopleSoft Advanced Configurator Server
- Resetting the Port
- Setting the XML Encoding Option (Optional)

## Understanding the PeopleSoft Advanced Configurator Server Initiation on Sun Solaris

After you install the Oracle WebLogic Server 10.3.1 and the PeopleSoft Advanced Configurator Server, you need to start the PeopleSoft Advanced Configurator Server. Oracle provides a startup script file, `startConfigurator.sh`.

You can call `startConfigurator.sh` the following two ways:

- Manually: Issue the `startConfigurator.sh` command on the command line.
- Automatically: Use the Sun Solaris daemon to start this script file after the system is running.

When you call the `startConfigurator.sh` script file, all of the necessary system environment variables are set up for the Oracle WebLogic Server, the Sun JDK, and the PeopleSoft Advanced Configurator Server.

The `startConfigurator.sh` script file performs the following tasks for you:

- Sets the appropriate system variables for the Sun JDK.
- Sets the appropriate system variables for the PeopleSoft Advanced Configurator Server.
- Defines a Java classpath for the Oracle WebLogic Server.
- Starts the PeopleSoft Advanced Configurator Server.

### Task 12-7-1: Starting PeopleSoft Advanced Configurator Server from the Command Line

To start the PeopleSoft Advanced Configurator Server from the command line:

1. Log in as the Oracle WebLogic Server user.
2. Change the directory to the location of the PeopleSoft Advanced Configurator Server by using this command:

```
cd <WEBLOGIC_HOME>/config/CalicoDomain
```

3. Start the script file by using this command:

```
./startConfigurator.sh
```

The script starts the PeopleSoft Advanced Configurator server.

---

**Note.** To start and run the server in the background, use this command:

```
nohup ./startConfigurator.sh &
```

---

## Task 12-7-2: Stopping the PeopleSoft Advanced Configurator Server from the Command Line

To stop the startConfigurator script file from the command line:

1. Log in as the Oracle WebLogic Server user.
2. Change the directory to the location of the PeopleSoft Advanced Configurator Server by using this command:

```
cd <WEBLOGIC_HOME>/config/CalicoDomain
```

3. Start the script file with the command:

```
./stopConfigurator.sh
```

This stops the PeopleSoft Advanced Configurator Server.

## Task 12-7-3: Automatically Starting the PeopleSoft Advanced Configurator Server

To set up the PeopleSoft Advanced Configurator Server to start automatically when the Sun 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 necessary for your system):

```
#!/sbin/sh
CONFIG_HOME=<WEBLOGIC_HOME>/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 }"
;;
esac
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 12-7-4: Resetting the Port

To change the server port:

1. Open the Oracle WebLogic Server Administration console for the Calico Domain:  
`http://<host_name>:7777/console`

---

**Note.** 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

Log in with the user name and password.

2. Select Environment, Servers, MyServer.
3. On the Configuration page, General sub-tab, enter a new value for Listen Port.
4. Click the Save button and restart the PeopleSoft Advanced Configurator Server.

## Task 12-7-5: Setting the XML Encoding Option (Optional)

This task is optional. Product configuration data that is 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 Oracle WebLogic Server Console.

---

**Note.** Oracle recommends that you use the default UTF-8, or that you change the encoding to specify the Internet Assigned Numbers Authority (IANA) encoding name.

---

To change XML output encoding:

1. Open the file `web.xml` for editing. It is located at:  
`<WEBLOGIC_HOME>/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 these. Enter the encoding that you want in the param-value element (this example uses Shift-JIS):

```
<init-param>
  <param-name>encoding</param-name>
  <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the PeopleSoft Advanced Configurator Server.

---

## Task 12-8: Installing the PeopleSoft Visual Modeler

This section discusses:

- Understanding the PeopleSoft Visual Modeler
- Installing the PeopleSoft Visual Modeler on Microsoft 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 PeopleSoft Visual Modeler requires access to a PeopleSoft Advanced Configurator Server that can be local or remote.

In addition, if model data is stored externally in a database, you can specify the connection in PeopleSoft Visual Modeler. This section describes some of the information that you need to gather before installing PeopleSoft Visual Modeler.

For information on the hardware and software requirements for PeopleSoft Visual Modeler, see the *PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide*.

See *PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide*.

*Supported Databases:*

Use of the PeopleSoft Visual Modeler does not require a database installed on your system. However, if you want to use external data within your models, the PeopleSoft Visual Modeler supports the same databases as PeopleSoft Advanced Configurator Server (see Prerequisites)

### Task 12-8-1: Installing the PeopleSoft Visual Modeler on Microsoft Windows

To install the PeopleSoft® Visual Modeler™:

1. If the Oracle WebLogic Server 10.3.1 or the PeopleSoft Advanced Configurator Server is not yet installed on a server, do so now before proceeding.
2. Log in as Microsoft Windows Administrator or as a user with administrative privileges.
3. Insert the CRM 9.1 CD-ROM in the drive (of a Windows machine).

You can retrieve the PeopleSoft CRM WebLogic files from your E-Delivery download.

4. Double-click `setup.exe` to launch the installation.
5. Click Next.

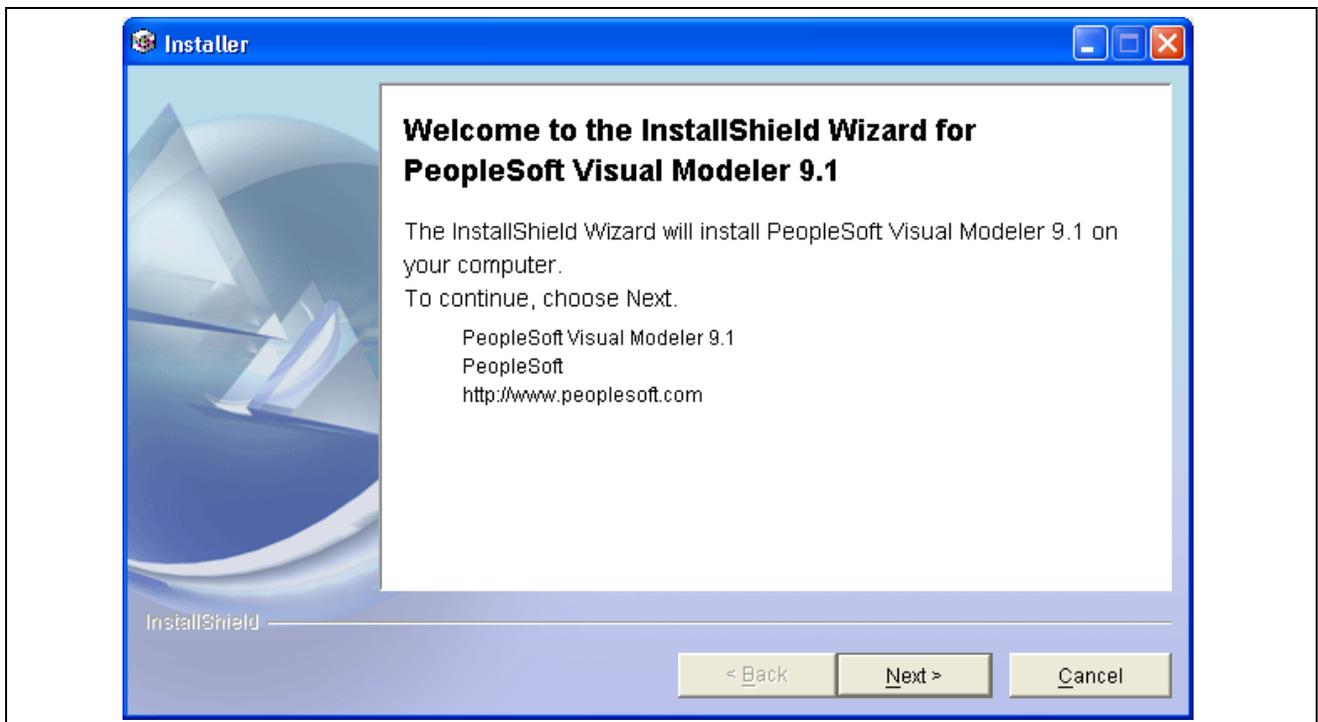
The License Agreement dialog appears.

6. Accept the license agreement and click Next.

The Select Database dialog appears.

7. Select the type of database that you plan to use.

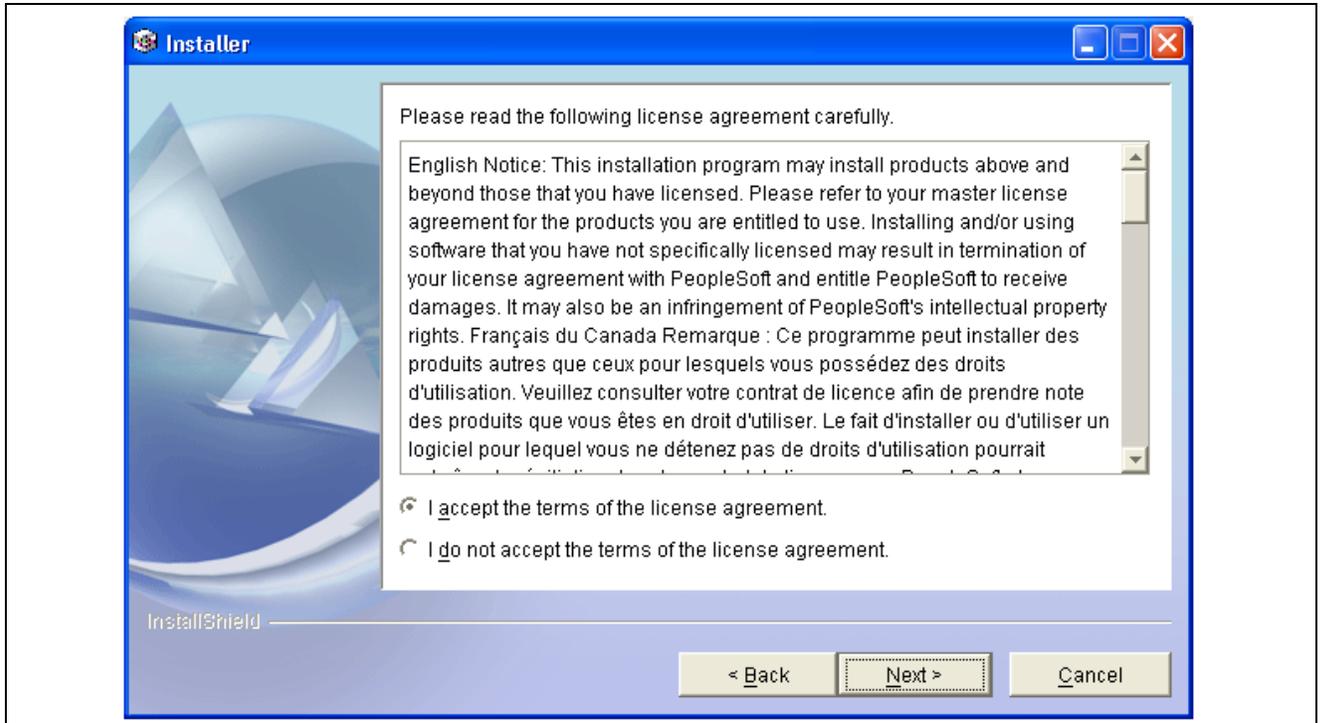
8. If you are prompted to select Unicode or non-Unicode; choose appropriately according to your database setup.  
The Server Selection dialog appears.
9. If you are installing only PeopleSoft Advanced Configurator, select only PeopleSoft File Server.  
Otherwise, select PeopleSoft File Server and any other PeopleSoft servers that you want to install.  
The Directory Selection dialog appears.
10. Select the directory in which to install the PeopleSoft Visual Modeler installer.  
The Product Selection dialog appears.
11. If you want to install only PeopleSoft Advanced Configurator, clear the check boxes of all products except PeopleSoft Advanced Configurator.  
Otherwise, select PeopleSoft Advanced Configurator and any other products that you want to install.  
The PeopleSoft Visual Modeler installer is copied to the directory that you specified earlier.
12. Navigate to that directory and, within it, navigate to: `<PS_HOME>\setup\AdvancedConfigurator\ViM`
13. Double-click `VisualModeler_setup.exe` to launch the installation.  
The InstallShield Wizard Welcome page appears, as shown in the following example:



PeopleSoft Visual Modeler InstallShield Wizard - Welcome page

14. Click Next.

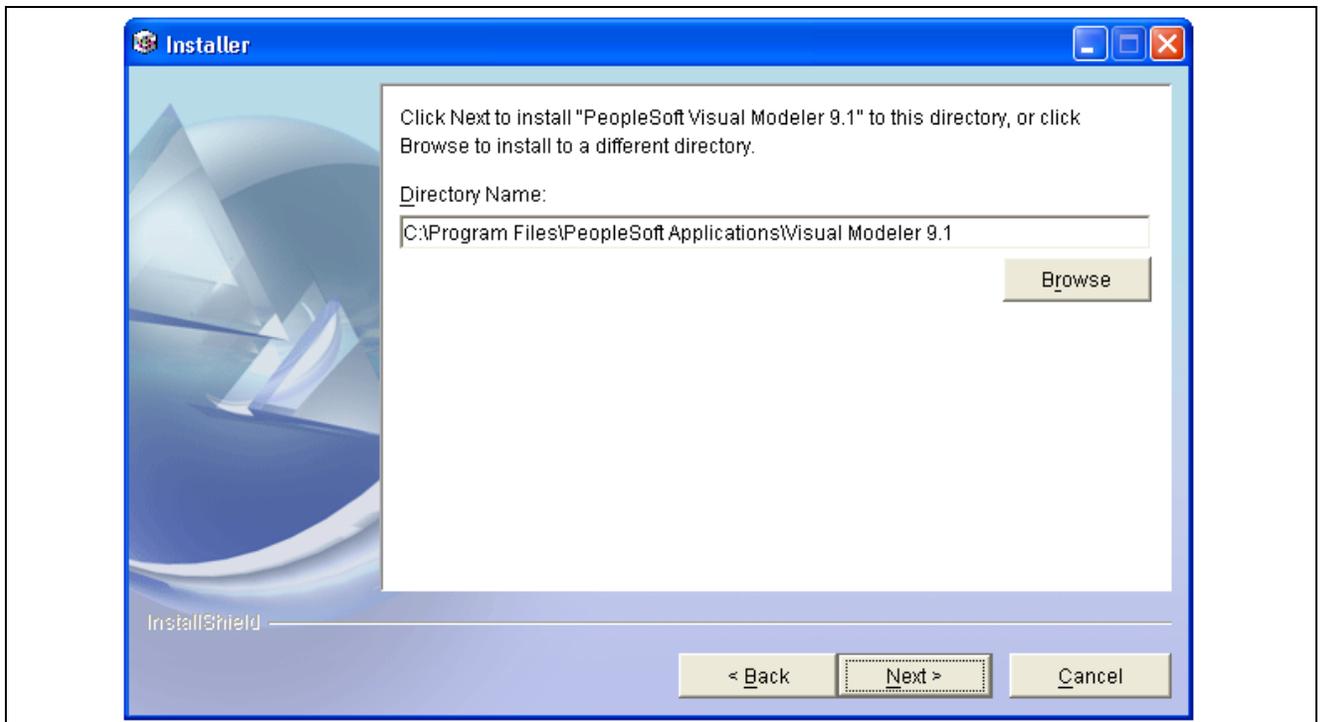
The License agreement dialog appears, as shown in the following example:



PeopleSoft Visual Modeler InstallShield Wizard - License Agreement page

15. Accept the terms of the license agreement and click Next.

The Install location page appears, as shown in the following example:

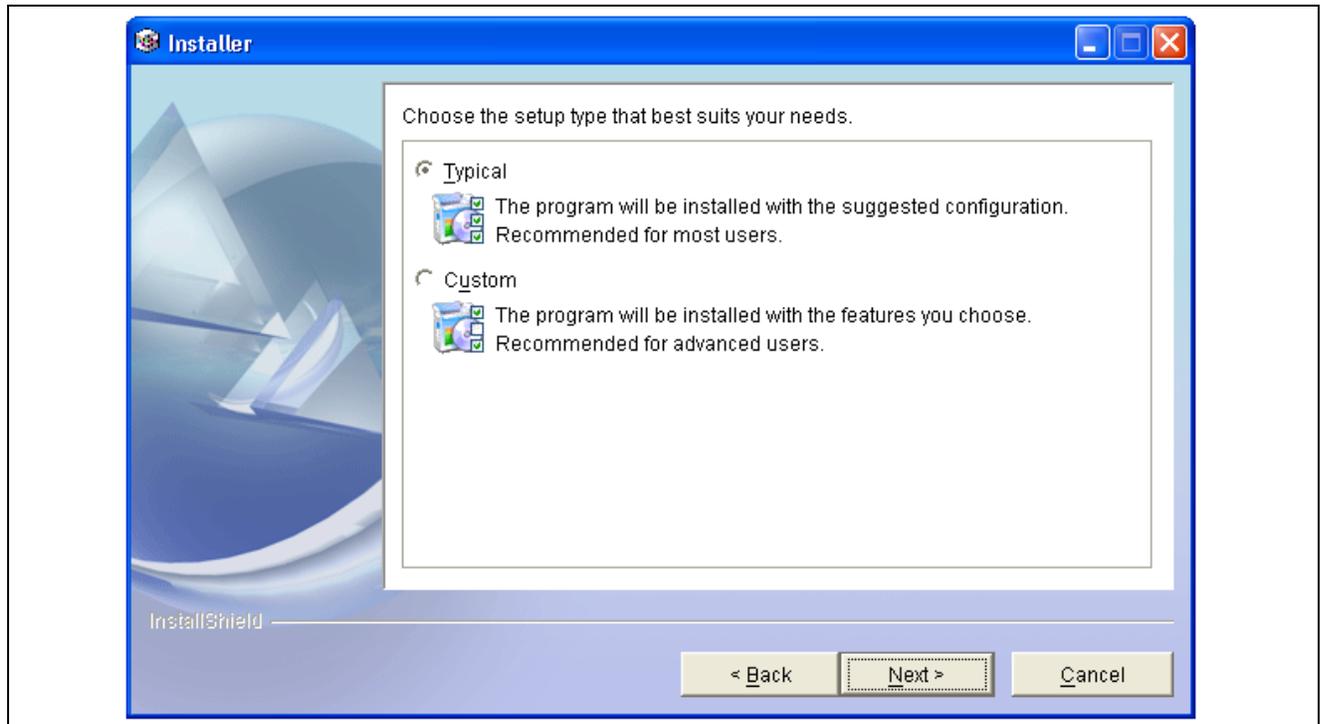


PeopleSoft Visual Modeler InstallShield Wizard - Directory selection

By default, files are installed in C:\Program Files\PeopleSoft Applications\Visual Modeler 9.1.

16. Click Next.

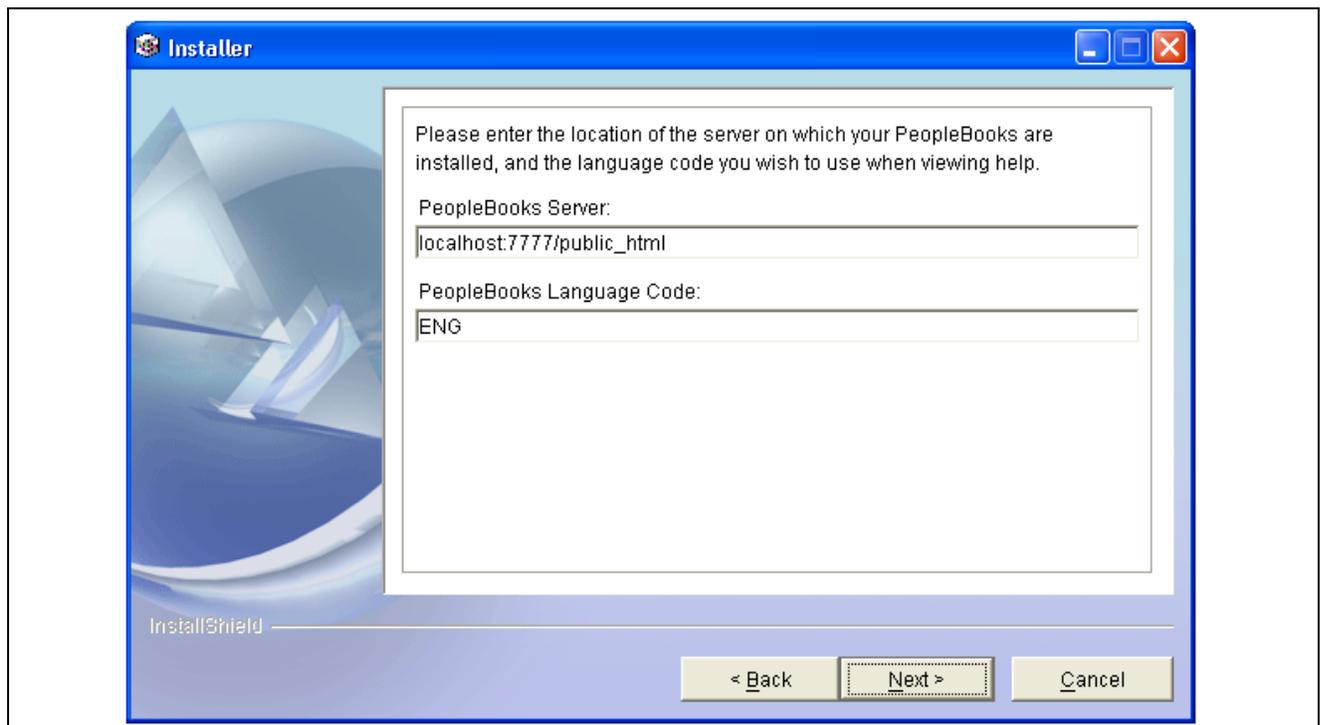
The setup type page appears, as shown in the following example:



PeopleSoft Visual Modeler InstallShield Wizard - Setup type option page

17. Select Typical or Custom install.
18. Click Next.

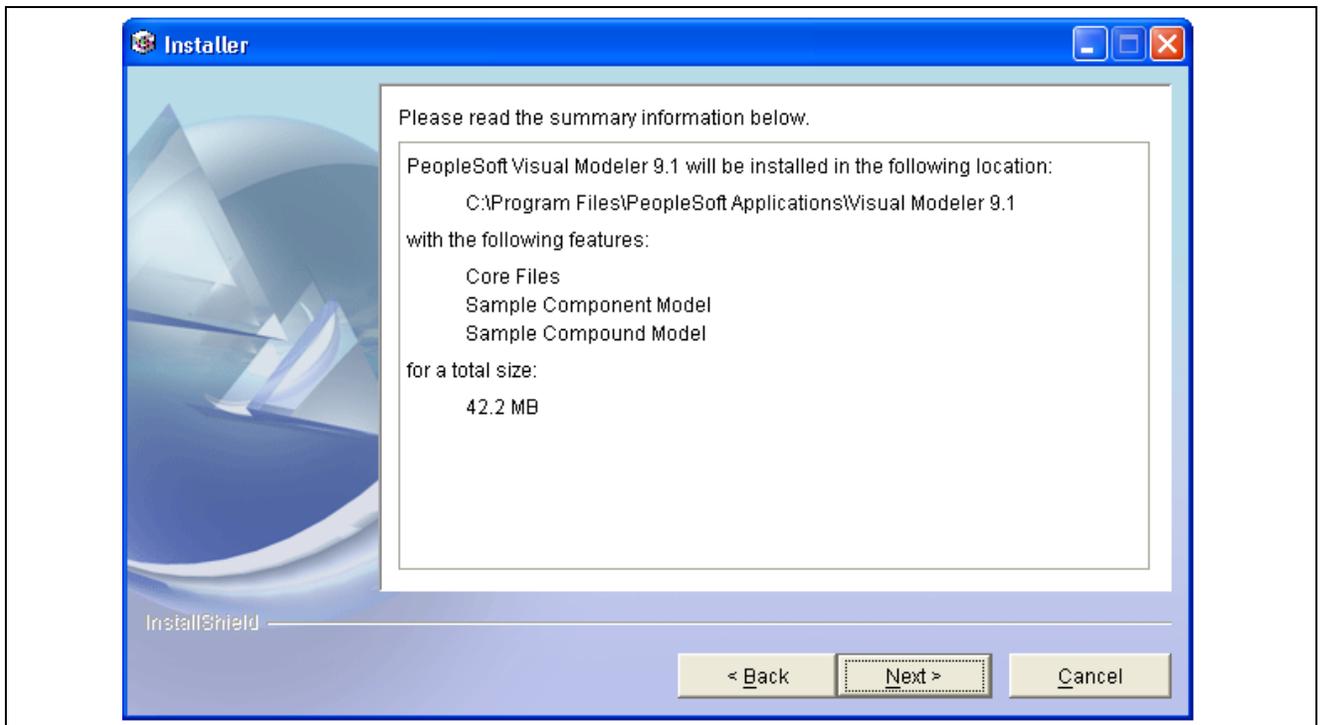
The PeopleBooks location page appears, as shown in the following example:



PeopleSoft Visual Modeler InstallShield Wizard - Specify PeopleBooks server option page

19. Enter the location of the server where you installed the PeopleSoft PeopleBooks.
20. Click Next.

The Summary Information Dialog appears, as shown in the following example:



PeopleSoft Visual Modeler InstallShield Wizard - Summary Information page

21. Click Next to continue.

The installation begins.

---

**Note.** There is no need to restart the system after your installation completes.

---

## Task 12-8-2: Uninstalling the PeopleSoft Visual Modeler

Use the Control Panels Add/Remove Programs utility to uninstall PeopleSoft Visual Modeler. The uninstall program removes the PeopleSoft Visual Modeler files from your system. Files that are generated while using the product remain intact.

---

## Task 12-9: Installing for Integration with PeopleSoft Order Capture

This section discusses:

- Understanding PeopleSoft Advanced Configurator and PeopleSoft Order Capture Integration
- Reviewing the Recommended Architecture
- Installing the PeopleSoft Advanced Configurator for Integration with PeopleSoft Order Capture

- Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

## Understanding PeopleSoft Advanced Configurator and PeopleSoft Order Capture Integration

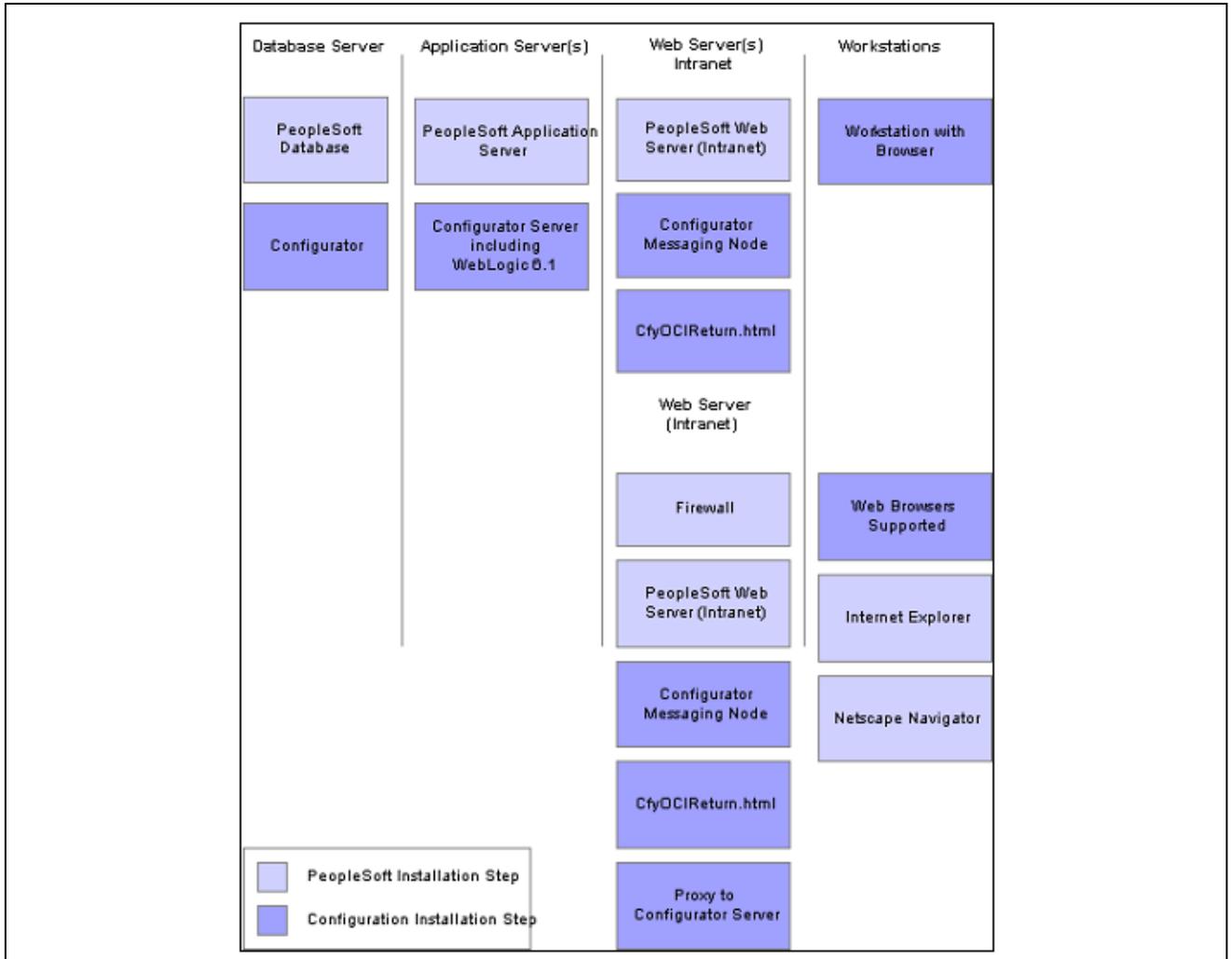
This section describes how to install and set up the components necessary to integrate the PeopleSoft Advanced Configurator web application with PeopleSoft Order Capture (OC). After setup completes, a user creating an order can launch a configuration session from an order entry line, configure a product, and return to the PeopleSoft Order Capture page with the updated product information.

The general steps necessary to integrate the PeopleSoft Advanced Configurator web application with PeopleSoft Order Capture are:

1. Install the Oracle WebLogic Server for PeopleSoft Advanced Configurator.
2. Install the PeopleSoft Advanced Configurator server.
3. Set up the PeopleSoft Advanced Configurator server.
4. Set up proxy servers, as required.

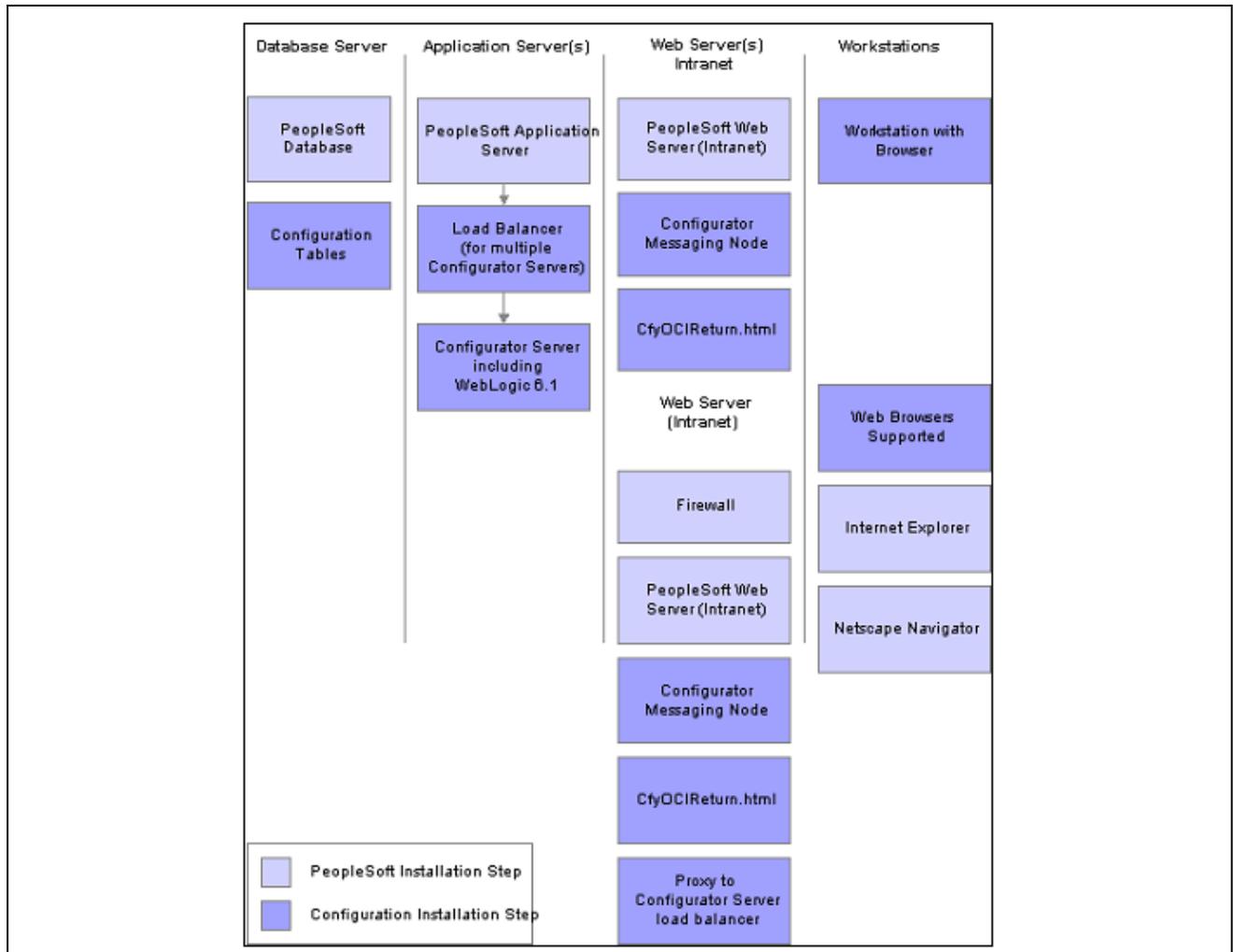
### Task 12-9-1: Reviewing the Recommended Architecture

The following diagrams represent the recommended architecture for PeopleSoft Advanced Configurator and PeopleSoft Order Capture (OC) for low-volume environments:



Recommended architecture for low-volume environments

The following diagrams represent the recommended architecture for PeopleSoft Advanced Configurator and PeopleSoft Order Capture (OC) for high-volume environments:



Recommended architecture for high-volume environments

## Task 12-9-2: Installing the PeopleSoft Advanced Configurator for Integration with PeopleSoft Order Capture

To install the PeopleSoft Advanced Configurator for integration with PeopleSoft Order Capture (OC):

1. Install your PeopleSoft PeopleTools-based CRM system, including the WebServer, Appserver and Database.
2. Set up a working Integration Broker server using the PeopleSoft PeopleTools documentation.
3. Install the Oracle WebLogic Server 10.3.1 (as previously instructed).

**Note.** Oracle recommends that you install the Oracle WebLogic Server 10.3.1 for the PeopleSoft Advanced Configurator Server in a separate Oracle WebLogic 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 Oracle WebLogic application server is used for your PeopleSoft Advanced Configurator Server. For better performance, you can install the PeopleSoft 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 PeopleSoft Advanced Configurator servers to the system.

4. Install the PeopleSoft Advanced Configurator Server on your web server (as previously described).

---

**Note.** When you run the PeopleSoft Advanced Configurator installation, you must select the option to set up a database to contain configurations. Enter the database connectivity information for your PeopleSoft CRM database.

---

5. If required, set up a proxy to the PeopleSoft Advanced Configurator Server.
6. On your PeopleSoft CRM system, select PeopleTools, Integration Broker, Integration Setup, Nodes.
7. Search for and select the *PSFT\_CFG* node.
8. Click the Connectors tab to access the Connectors page.
9. Edit the PRIMARY URL property and replace "crmconfig01.peoplesoft.com" with your server name.

---

**Note.** 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

### Task 12-9-3: Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

For implementations that use a PeopleSoft Web server outside of a firewall, an additional installation step is required.

By default, the PeopleSoft Advanced Configurator Server is set up to listen on port 7777. Most implementations do 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](http://ps_config_server_ip:7777/copxml)) result in an error that indicates that the page cannot be found.

The solution is to proxy (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 a URL known to the proxy setup, it redirects the request to the PeopleSoft Advanced Configurator server.

For example, a request of [http://ps\\_web\\_server\\_ip/copxml](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 there are no issues with firewall permission.

The following URLs require proxy set up in an installation of a PeopleSoft Web server outside of a firewall:

- [http://ps\\_config\\_server\\_ip:7777/copxml](http://ps_config_server_ip:7777/copxml)
- [http://ps\\_config\\_server\\_ip:7777/solutions/\\*](http://ps_config_server_ip:7777/solutions/*)
- [http://ps\\_config\\_server\\_ip:7777/calico/\\*](http://ps_config_server_ip:7777/calico/*)
- [http://ps\\_config\\_server\\_ip:7777/solutionlist](http://ps_config_server_ip:7777/solutionlist)
- [http://ps\\_config\\_server\\_ip:7777/ConfigServerInfo/\\*](http://ps_config_server_ip:7777/ConfigServerInfo/*)

*Example Proxy Setup for the Oracle 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\PORT AL\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. You should install all solutions under this directory:

```

<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>

<url-pattern>/solutions/*</url-pattern>
</servlet-mapping>

```

---

## Task 12-10: Installing Multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows (Optional)

This section discusses:

- Using Multiple Oracle WebLogic Server Installations
- Using a Single Oracle WebLogic Server Installation

The PeopleSoft Advanced Configurator 9 installer for Microsoft Windows only allows one instance to be installed per machine. However, multiple instances can be created by executing a few manual steps.

There are two ways to install multiple instances:

- Using multiple Oracle WebLogic installs.
- Using a single Oracle 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 12-10-1: Using Multiple Oracle WebLogic Server Installations

To install multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows using multiple Oracle WebLogic Server installations:

1. Run the Oracle WebLogic Server installer again.  
Ensure that you 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 how you can change the port to 7001, but you can use any port number that you desire.
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 want to run both instances as services at the same time, then you can 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 12-10-2: Using a Single Oracle WebLogic Server Installation

Creating multiple Configurator instances within the same Oracle WebLogic Server installation is similar to the process with multiple Oracle WebLogic Server installations. The key difference is that each instance must have a unique domain name.

To install multiple Configurator instances on Microsoft Windows using multiple Oracle WebLogic Server installations:

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`.

Change all occurrences of CalicoDomain to CalicoDomain2.

3. Edit %BEA\_HOME%\wlserver\_10.3\config\CalicoDomain\startConfigurator.cmd.

Change all occurrences of CalicoDomain to CalicoDomain2.

4. Edit %BEA\_HOME%\wlserver\_10.3\config\CalicoDomain\stopConfigurator.cmd.

Change all occurrences of CalicoDomain to CalicoDomain2.

5. Edit %BEA\_HOME\_2%\wlserver\_10.3\config\CalicoDomain\install\propupdate.cmd.

Change all occurrences of CalicoDomain to CalicoDomain2. If you do not want 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 you how to change the port to 7001, but you can use any port number that you desire.

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 want to run both instances as services at the same time, then you can proceed 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 Change set SERVICE\_NAME=PeopleSoft Configurator Server to set SERVICE\_NAME=Configurator Instance 2

## CHAPTER 13

# Installing the Oracle WebLogic Controller

This chapter discusses:

- Understanding the Oracle WebLogic Controller
- Prerequisites
- Installing the Oracle WebLogic Controller on UNIX
- Installing the Oracle WebLogic Controller on Microsoft Windows
- Configuring and Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

---

## Understanding the Oracle WebLogic Controller

N-Level products is an enhancement to Product Model as used by PeopleSoft Order Capture (OC). The enhancement requires the installation of a new Sun Java controller that interacts with the Product Configurator (PeopleSoft Advanced Configurator) for the Oracle WebLogic Controller. This controller application is designed to support Multilevel products used mainly in the communication industry.

This chapter provides instructions for the installation and set up of the Oracle WebLogic Controller.

---

**Note.** Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.50 Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks.

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**Note.** Consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

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**Note.** Before you begin your installation of the Oracle WebLogic Controller, consult the PeopleSoft Enterprise CRM 9.1 Hardware and Software Requirements Guide available on My Oracle Support for the latest supported platform information.

---

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**Note.** The APC (Advanced Product Configurator) is also referred to in this chapter as the PeopleSoft Advanced Configurator.

---

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## Prerequisites

You must complete the following requirements before proceeding with your Oracle WebLogic Controller installation:

1. You must install and configure the PeopleSoft Advanced Configurator before proceeding with the tasks in this chapter.
2. Complete the task “Setting Up the PeopleSoft Integration Broker” in Chapter 1 of this PeopleSoft Enterprise CRM 9.1 Installation guide.

See "Installing the PeopleSoft Advanced Configurator 9.1"

---

## Task 13-1: Installing the Oracle WebLogic Controller on UNIX

This section discusses:

- Installing the PeopleSoft Advanced Configurator
- Exporting the Configuration and Running the AE Program
- Installing the PeopleSoft Visual Modeler 9.1
- Updating JNDIDBName.properties
- Compiling the ProductCatalogueRepository Model and Exporting the XML File
- Using Web Based Compilation
- Creating the Oracle WebLogic Controller Domain on UNIX
- Creating the WebApplications Folder Under the Controller Domain
- Modifying the Webservices Properties File (webservices.properties)
- Modifying the Application Properties File (application.properties)
- Deploying the Oracle WebLogic Controller Application

### Task 13-1-1: Installing the PeopleSoft Advanced Configurator

Install the PeopleSoft Advanced Configurator server on your UNIX system.

See "Installing the PeopleSoft Advanced Configurator 9.1"

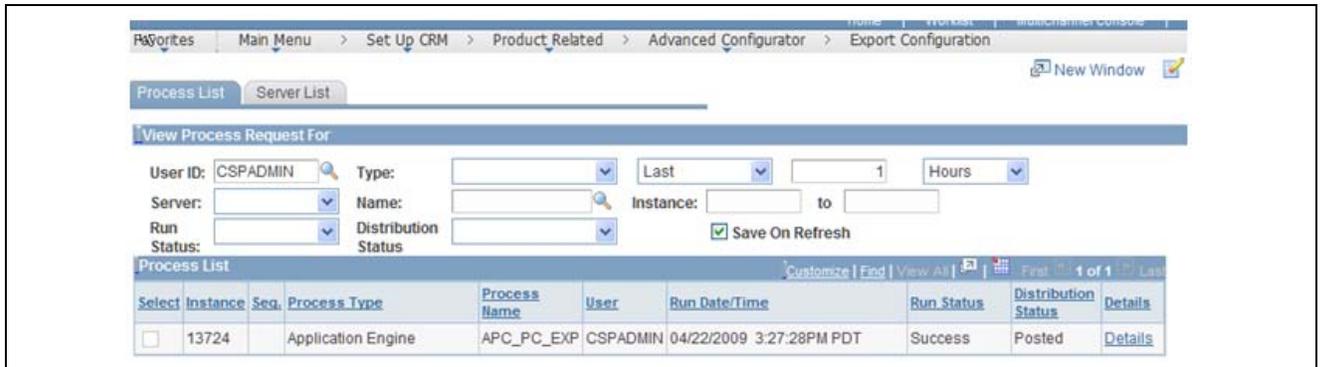
This chapter appears earlier in this installation guide.

Verify that the PeopleSoft Advanced Configurator server is started by navigating to: *http://<configurator server>:7777/*

### Task 13-1-2: Exporting the Configuration and Running the AE Program

To export the configuration and run the Application Engine (AE) program:

1. Login to PeopleSoft Pure Internet Architecture for the target PeopleSoft environment.
2. Select Set Up CRM, Product Related, Advanced Configurator, Export Configuration.
3. Click Add a new value. Enter a Run Control ID and click Add.  
The Export Product Definitions page appears.
4. Enter a value in the Request ID field.
5. Click the Run button to run the AE program (APC\_PC\_EXP) using the default settings, as shown in the following example of the Process List page:



PeopleSoft Advanced Configurator - Export Configuration: Process List page

6. Click OK.

### Task 13-1-3: Installing the PeopleSoft Visual Modeler 9.1

To install the PeopleSoft Visual Modeler:

See "Installing the PeopleSoft Advanced Configurator," Installing the PeopleSoft Visual Modeler 9.1.

### Task 13-1-4: Updating JNDIDBName.properties

To update the JNDIDBName.properties:

1. Ensure that APC (PeopleSoft Advanced Configurator) Server instance is not running; shut down the server.
2. Set up the APC (PeopleSoft Advanced Configurator) database connection by editing the file: `<WEBLOGIC_HOME>/Config/CalicoDomain/applications/CalicoApp/WEB-INF/config/JNDIDBName.properties`

The JNDIDBName.properties file should look similar to this example:

```
# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database=>
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
```

```

oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
db2db.url=jdbc:db2://[HostName]:[PortNumber]/[DatabaseName]
db2db.driver=com.ibm.db2.jcc.DB2Driver
db2db.username=[username]
db2db.password=[password]

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4

```

### 3. Edit the values of the database platform for your respective database:

For SQL Server: replace sqlldb with your Sql Server database name.  
 For Oracle: replace oracledb with your Oracle database name.  
 For DB2: replace db2db with your DB2 database name.

Replace the url settings for your platform with your appropriate values.  
 Replace [username] for your platform with your database owner id.  
 Replace [password] for your platform with your database owner id password.

The PSCFG settings should already be configured based on the settings you entered while installing the APC (PeopleSoft Advanced Configurator) server. The PSCFG settings should match the database settings that you just modified for your respective platform.

### 4. The following JNDIDBName.properties file is an example after it has been modified for a DB2 database:

```

# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqlldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database=>
Name];sql70=true;charset=Cp1252
sqlldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqlldb.username=[username]
sqlldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
CR91USHP.url=jdbc:db2://ui-lnx09:60003/CR91USHP
CR91USHP.driver=com.ibm.db2.jcc.DB2Driver
CR91USHP.username=upgtest4

```

```
CR91USHP.password=upgtest4

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4
```

5. After you complete the modifications, restart the APC (PeopleSoft Advanced Configurator) server instance.

## Task 13-1-5: Compiling the ProductCatalogueRepository Model and Exporting the XML File

This section discusses:

- Compiling the ProductCatalogueRepository Model
- Exporting the XML File

### Compiling the ProductCatalogueRepository Model

To compile the *ProductCatalogueRepository* model with the PeopleSoft Visual Modeler, perform these steps:

1. From the UNIX server where you installed the APC (PeopleSoft Advanced Configurator) server, navigate to the *ProductCatalogueRepository* model. The location of this model is :

```
<WEBLOGIC_HOME>/config/CalicoDomain/install/controller/ViM-model/<MODEL_TYPE>/ProductCatalogueRepository
```

---

**Note.** The *<MODEL\_TYPE>* depends on what you are installing. The models are contained in these folders:

For DB2 and MSS, access the *mss\_2008* directory.

For Oracle, access the *oracle* directory.

---

2. FTP the *ProductCatalogueRepository* model folder to your Microsoft Windows environment where you installed the PeopleSoft Visual Modeler. You can place the folder in any accessible location.

---

**Important!** FTP the *ProductCatalogueRepository* model in binary mode.

---

3. Start the PeopleSoft Visual Modeler 9.1 application. Close the dialog box upon startup if it appears.
4. Click File, Open Workspace. Open the *ProductCatalogueRepository.csw* file from the *ProductCatalogueRepository* model that you placed on your Microsoft Windows environment in the previous steps.
5. A database connection dialog box appears. Enter your database connection information, and then click the Retry button.
6. From the menu, select Project, Settings to open the Project Settings dialog box.
7. Define the PeopleSoft Configurator Server Location with the proper values that point to the APC (PeopleSoft Advanced Configurator) server and port number on UNIX.
8. Click OK to save the settings.

- Click the Compile icon (hover to locate the *Compile the model* icon) on the PeopleSoft Visual Modeler menu.
- Verify that you receive no errors. Warnings are okay. These warnings are due to related language entry and can be ignored.

## Exporting the XML File

To export the XML file:

- From the UNIX server where you installed the APC (PeopleSoft Advanced Configurator) server, navigate to the XML file in the *ProductCatalogueRepository*.

This example details the path: `<WEBLOGIC_HOME>/config/CalicoDomain/applications/CalicoApp/WEB-INF/models/ProductCatalogueRepository/1/0/0/20090824-190020-628`

The following shows an example of the path to the XML file in the *ProductCatalogueRepository*:

```

ui-sun10:~$ pwd
/dsl/home/upgtest2/WLS1031/wlaerver_10.3/config/CalicoDomain/applications/CalicoApp/WEB-INF/models/ProductCatalogueRepository/1/0/0/20090824-190020-628
ui-sun10:~$ ls -l
total 8976
-rw-rw-r-- 1 upgtest2 dba          129 Aug 24 19:00 Explanations.properties
-rw-rw-r-- 1 upgtest2 dba      642519 Aug 24 19:00 GCL
-rw-rw-r-- 1 upgtest2 dba      108320 Aug 24 19:00 LEP
-rw-rw-r-- 1 upgtest2 dba       63563 Aug 24 19:00 MAP
-rw-rw-r-- 1 upgtest2 dba      972594 Aug 24 19:00 RTP
-rw-rw-r-- 1 upgtest2 dba      642519 Aug 24 19:00 SGCL
-rw-rw-r-- 1 upgtest2 dba       73545 Aug 24 19:00 TM&P
-rw-rw-r-- 1 upgtest2 dba     2026754 Aug 24 19:00 XML
ui-sun10:~$

```

Example showing the path to the XML file in the *ProductCatalogueRepository*

---

**Note.** The date directory at the end of the path will vary. Select the most recent date.

---

- FTP this precompiled XML file to your Microsoft Windows environment where you installed the Visual Modeler. You may place the file in any accessible directory.

---

**Important!** FTP the precompiled XML file in binary mode.

---

You will compile this XML file using the web browser in the next task *Using Web Based Compilation*.

## Task 13-1-6: Using Web Based Compilation

To compile using the web:

- Navigate to the PeopleSoft Advanced Configurator server running on your UNIX system.

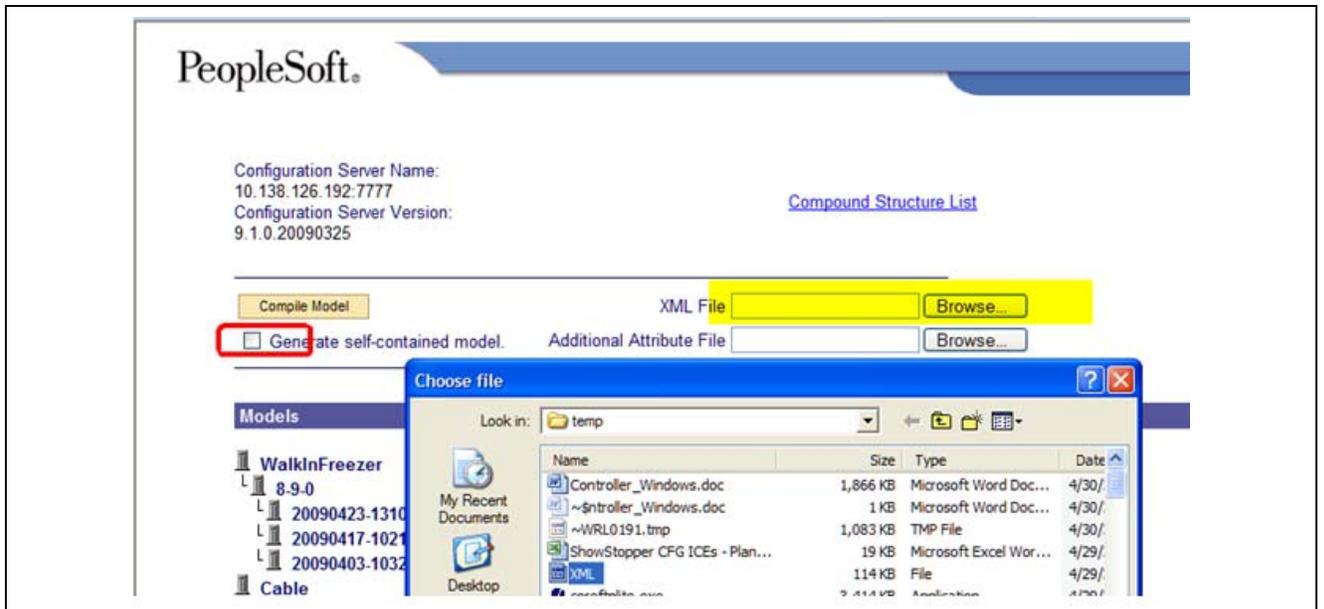
For example: `http://<webserver>:7777/ConfigServerAdmin`

---

**Note.** 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

- Click the Browse button on the PeopleSoft Advanced Configurator Administration page to select the XML file that you just exported from UNIX to Microsoft Windows, as shown in the following example:



PeopleSoft Advanced Configurator - Choose file dialog box

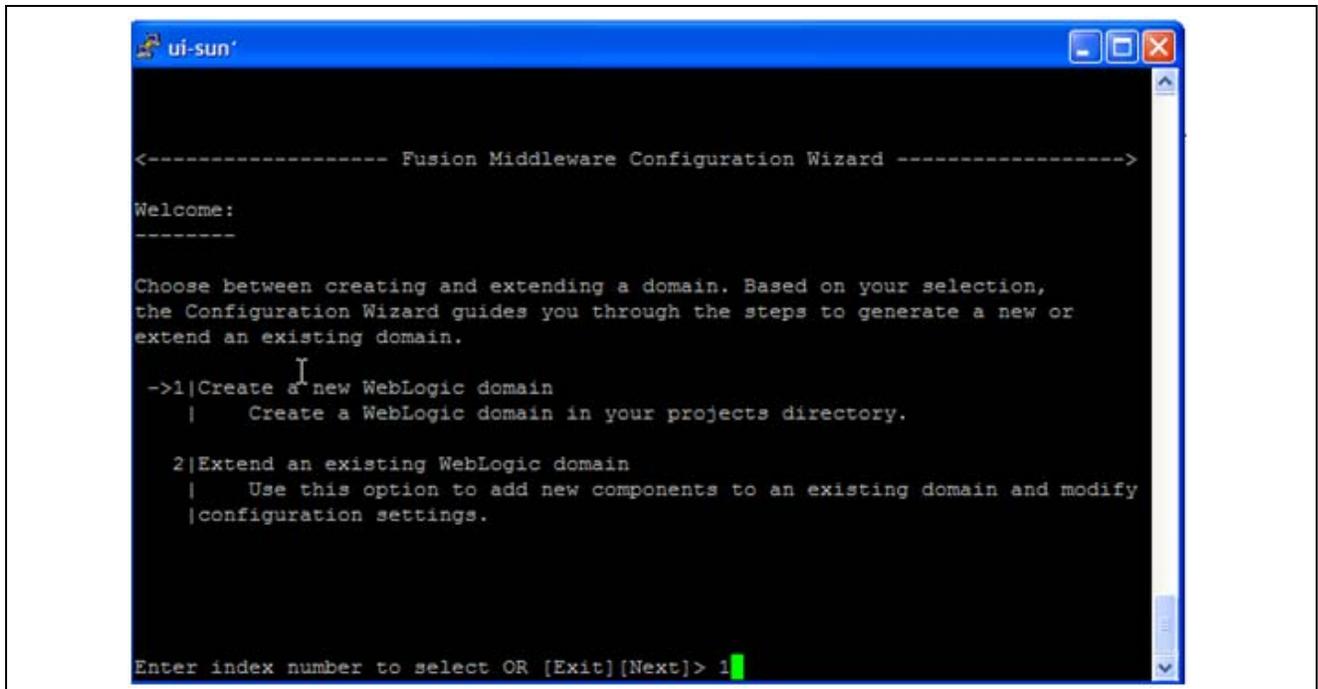
3. On the PeopleSoft Advanced Configurator server Administration page, select the Generate self-contained model check box.
4. Click the Compile Model button.

## Task 13-1-7: Creating the Oracle WebLogic Controller Domain on UNIX

Depending on your selection, the Oracle WebLogic Controller Configuration Wizard guides you through the steps necessary to create a new domain or extend an existing domain.

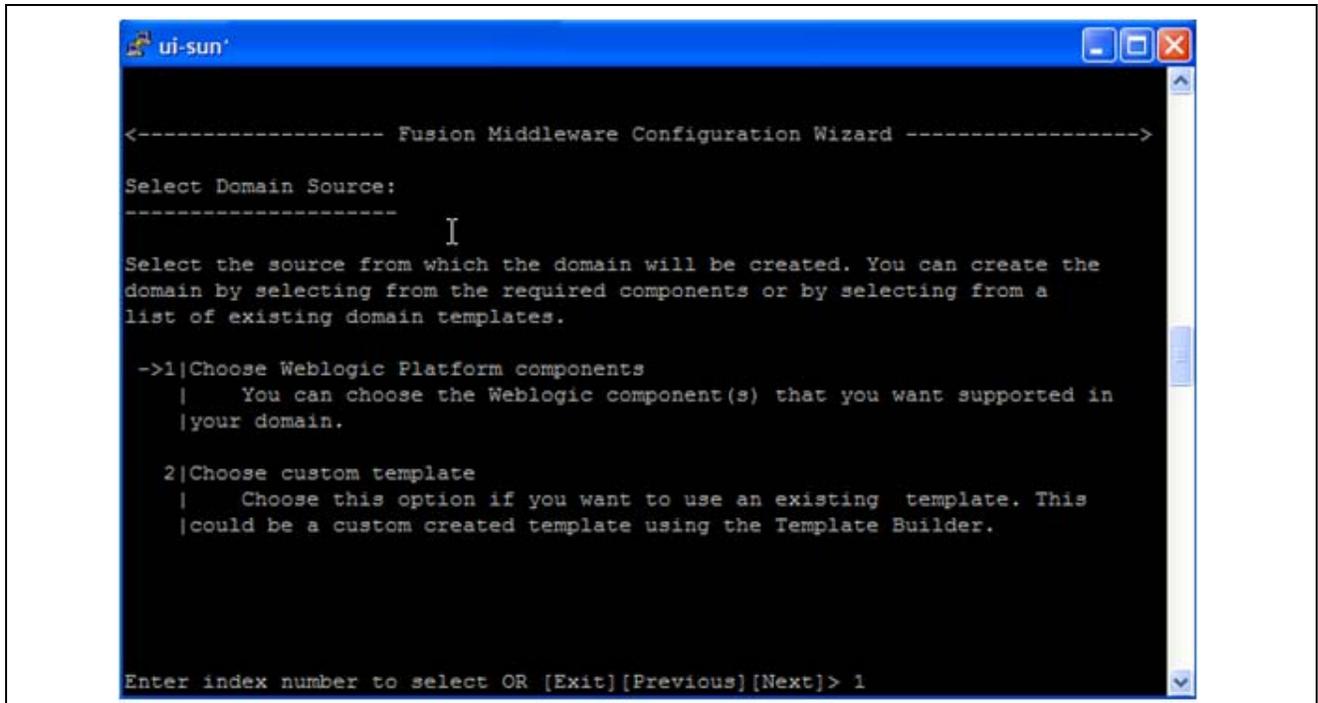
To create the Oracle WebLogic Controller domain on UNIX:

1. Access the Fusion Middleware Configuration Wizard from: `<WEBLOGIC_HOME>/common/bin/config.sh`  
The Fusion Middleware Configuration Wizard window appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Welcome window

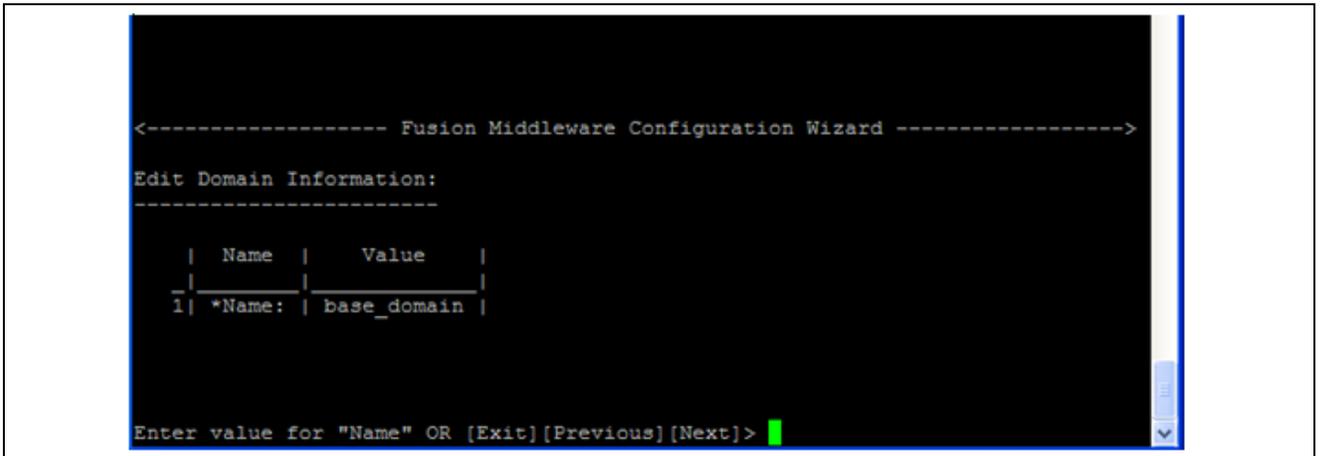
2. Create an Oracle WebLogic domain in your projects directory.
3. In the Fusion Middleware Configuration Wizard - Select Domain Source window, enter the index number, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Domain Source window

4. Press the Enter key on your keyboard.

- In the Fusion Middleware Configuration Wizard - Edit Domain Information window, enter the Domain Name that you want (for example: Controller\_Domain), and the Target Location (for example: <WEBLOGIC\_HOME>\config), as shown in the following example:



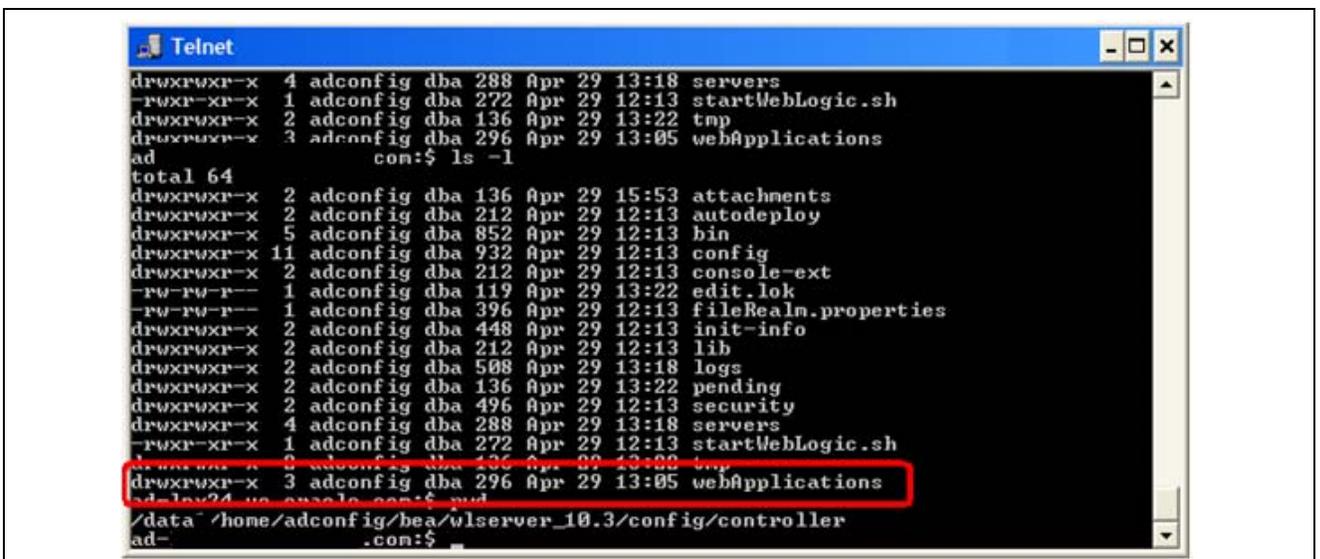
Fusion Middleware Configuration Wizard - Edit Domain Information window

- Create a user to be assigned to the Administrator role. This user is the default administrator that you use to start development mode servers.
- Enter the option number to select, and then complete the remainder of the installation using the Fusion Middleware Configuration Wizard.

## Task 13-1-8: Creating the WebApplications Folder Under the Controller Domain

To create the WebApplications folder under the Oracle WebLogic Controller Domain:

- Under your newly created Controller domain, create a new folder named *webApplications*, as shown in the following example:



Oracle WebLogic Controller Configuration Wizard - WebApplications folder

- Copy the *controller.war* file from <WEBLOGIC\_HOME>/config/CalicoDomain/install/controller to your <ControllerDomain>/webApplications folder, as shown in the following example:

```

Telnet
/data1/home/adconfig/bea/wlserver_10.3/config/controller
ad-
total 64
drwxrwxr-x 2 adconfig dba 136 Apr 29 15:53 attachments
drwxrwxr-x 2 adconfig dba 212 Apr 29 12:13 autodeploy
drwxrwxr-x 5 adconfig dba 852 Apr 29 12:13 bin
drwxrwxr-x 11 adconfig dba 932 Apr 29 12:13 config
drwxrwxr-x 2 adconfig dba 212 Apr 29 12:13 console-ext
-rw-rw-r-- 1 adconfig dba 119 Apr 29 13:22 edit.lok
-rw-rw-r-- 1 adconfig dba 396 Apr 29 12:13 fileReain.properties
drwxrwxr-x 2 adconfig dba 448 Apr 29 12:13 init-info
drwxrwxr-x 2 adconfig dba 212 Apr 29 12:13 lib
drwxrwxr-x 2 adconfig dba 508 Apr 29 13:18 logs
drwxrwxr-x 2 adconfig dba 136 Apr 29 13:22 pending
drwxrwxr-x 2 adconfig dba 496 Apr 29 12:13 security
drwxrwxr-x 4 adconfig dba 288 Apr 29 13:18 servers
-rwxr-xr-x 1 adconfig dba 272 Apr 29 12:13 startWebLogic.sh
drwxrwxr-x 2 adconfig dba 136 Apr 29 13:22 tmp
drwxrwxr-x 3 adconfig dba 296 Apr 29 13:05 webApplications
ad-
con:$ cd webApplications/
ad-
con:$ ls -l
total 15152
drwxrwxr-x 3 adconfig dba 288 Apr 29 13:05 unix_controller
-rw-rw-r-- 1 adconfig dba 15509485 Apr 29 13:04 unix_controller.zip
ad-
con:$

```

Oracle WebLogic Controller Configuration Wizard - Controller.war file copied to webApplications folder

- Copy the “ressources” folder from `<WEBLOGIC_HOME>/config/CalicoDomain/install/controller/` to your `<ControllerDomain>/webApplications` folder.

## Task 13-1-9: Modifying the Webservices Properties File (webservices.properties)

To modify the `webservices.properties` file that is located in the `ressources` folder:

- Edit the `webservice.properties` file, located in: `<ControllerDomain>/webApplications/ressources/controller`, as shown in the following example:

```

Telnet
total 88
-rw-rw-r-- 1 adconfig dba 2986 Apr 21 16:59 Advisor.properties
-rw-rw-r-- 1 adconfig dba 1014 Apr 21 16:59 application-config.xml
-rw-rw-r-- 1 adconfig dba 916 Apr 29 13:10 application.properties
-rw-rw-r-- 1 adconfig dba 3137 Apr 21 16:59 beans-config.xml
-rw-rw-r-- 1 adconfig dba 777 Apr 21 16:59 client-config.wadd
-rw-rw-r-- 1 adconfig dba 7543 Apr 21 16:59 problems.properties
-rw-rw-r-- 1 adconfig dba 3628 Apr 21 16:59 services-config.xml
-rw-rw-r-- 1 adconfig dba 317 Apr 21 16:59 webservices-CRM91EX3.properties
-rw-rw-r-- 1 adconfig dba 328 Apr 21 16:59 webservices-CRM91EX4.properties
-rw-rw-r-- 1 adconfig dba 319 Apr 21 16:59 webservices-CRM91EX5.properties
-rw-rw-r-- 1 adconfig dba 315 Apr 21 16:59 webservices-CRM91ST3.properties
-rw-rw-r-- 1 adconfig dba 315 Apr 21 16:59 webservices-CRM91ST4.properties
-rw-rw-r-- 1 adconfig dba 315 Apr 21 16:59 webservices-CRM91ST5.properties
-rw-rw-r-- 1 adconfig dba 317 Apr 21 16:59 webservices-CRM91US4.properties
-rw-rw-r-- 1 adconfig dba 317 Apr 21 16:59 webservices-CRM91US5.properties
-rw-rw-r-- 1 adconfig dba 316 Apr 21 16:59 webservices-CRMDEMO.properties
-rw-rw-r-- 1 adconfig dba 317 Apr 21 16:59 webservices-CRMDEMO3.properties
-rw-rw-r-- 1 adconfig dba 4371 Apr 21 16:59 webservices-config.xml
-rw-rw-r-- 1 adconfig dba 315 Apr 21 16:59 webservices-local.properties
-rw-rw-r-- 1 adconfig dba 581 Apr 29 13:12 webservices.properties
.us.oracle.com:$ pwd
/data1/home/adconfig/bea/wlserver_10.3/config/controller/webApplications/unix_co
ntroller/ressources/controller
.us.oracle.com:$

```

Navigation example inside webservices.properties folders - properties files

- Modify the IP address of all four of these entries with your PeopleSoft Gateway URL and Port, as shown in the following example:

```

Telnet
vs.timeout=28888

relatedcustomer.name=RB_CUSTOMER_Port
eligibilitycriteria.name=ELIGIBILITY_CRITERIA_Port
installedproducts.name=RE_INST_PRODUCT_Port
billingaccount.name=RBI_BILLING_ACCOUNT_Port

# CR918DUJ
eligibilitycriteria.address=http://10.138.125.168/PSIGW/PeopleSoftServiceListeningConnector
installedproducts.address=http://10.138.125.168/PSIGW/PeopleSoftServiceListeningConnector
relatedcustomer.address=http://10.138.125.168/PSIGW/PeopleSoftServiceListeningConnector
billingaccount.address=http://10.138.125.168/PSIGW/PeopleSoftServiceListeningConnector

"webservices.properties" [dos] 14L, 581C

```

IP address example with four entries to modify

## Task 13-1-10: Modifying the Application Properties File (application.properties)

To modify the *application.properties* file:

1. Edit the *application.properties* file, located in: *<ControllerDomain>/webApplications/ressources/controller*, as shown in the following example:

```

Telnet
calico.conf.userName=user
calico.conf.companyName=company

controller.model.pc.name=ProductCatalogueRepository
controller.model.pc.version=1.0

# default currency for getPrice method.
controller.getPrice.default.currency=USD

# Minimal severity of the messages displayed by the Controller
# ERR, WRN or INF
controller.messages.severity=WRN

# validation patterns for text/number/date values of attributes
controller.validation.pattern.attributevalue.text=.*
controller.validation.pattern.attributevalue.number=[0-9]+
controller.validation.pattern.attributevalue.date=yyyy-MM-dd

#
#path to use for the config, dtd and logs of calico
#configuratorCalico.root=C:/bea/wlserver_10.3/config/CalicoDomain/applications/CalicoApp/WEB-INF
configuratorCalico.root=/data1/home/adconfig/bea/wlserver_10.3/config/CalicoDomain/applications/CalicoApp/WEB-INF
"application.properties" [dos] 23L, 916C

```

Example of application.properties files

2. Modify the *ConfiguratorCalico.root* path to point to your WEBLOGIC\_HOME directory.

**Note.** If your Configurator is in a Microsoft Windows environment, ensure that you use the “/” convention like the example above when you modify the path.

## Task 13-1-11: Deploying the Oracle WebLogic Controller Application

To deploy the Oracle WebLogic Controller application:

1. Start the server, if it is not already started, by using the `startWeblogic.cmd` in your `ControllerDomain` directory.
2. Go to your weblogic console: `http://localhost: 7001/console`

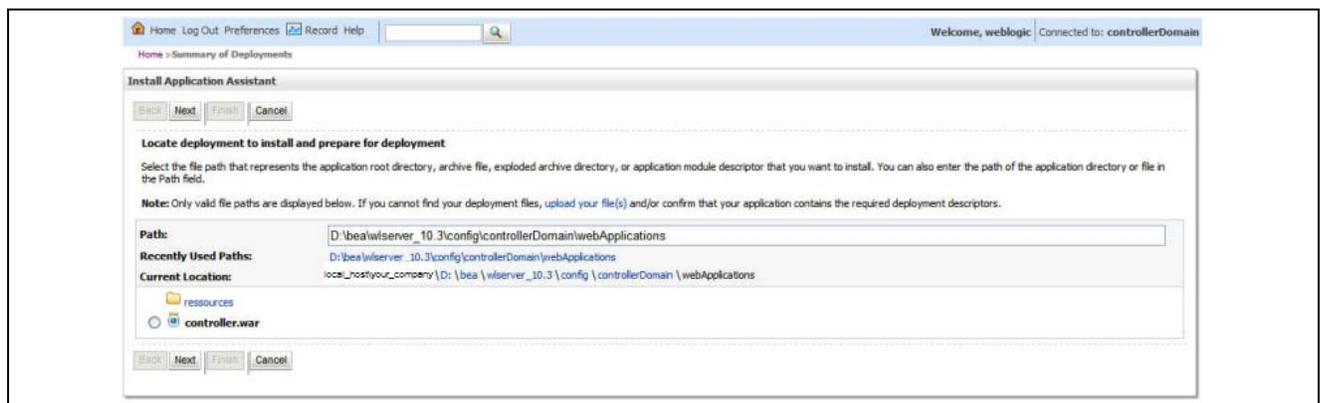
Log in to the Oracle WebLogic Server Administration Console - Log In page using your own username and password, as shown in the following example:



Oracle WebLogic Server Administration Console - Log In page

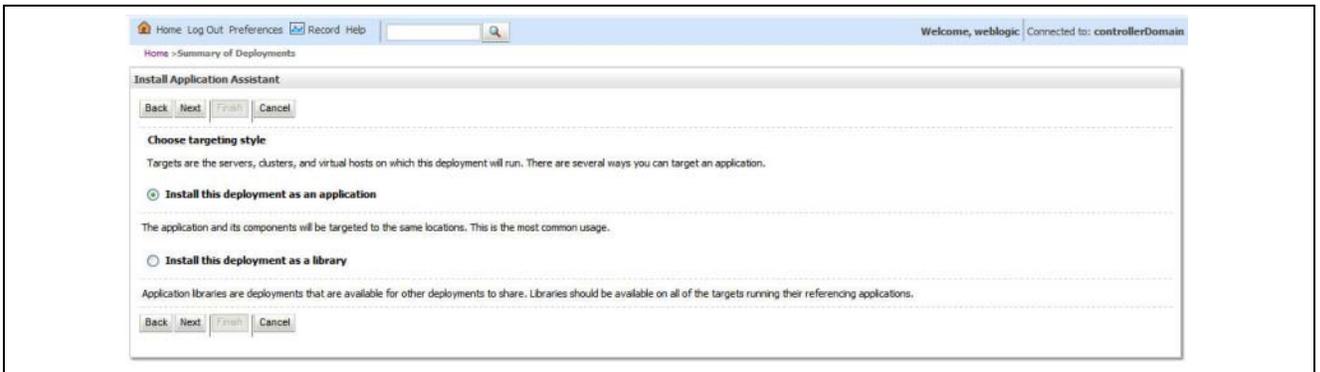
**Note.** `7001` is the default port for the Controller application. Your port may vary, depending on your configuration.

3. On the Oracle WebLogic Administration Console page, click Deployments in your Domain Structure tree, and then click the Install button.
4. Navigate to and select the `controller.war` file that you previously placed in the `<ControllerDomain>/webApplications` directory, as shown in the following example:



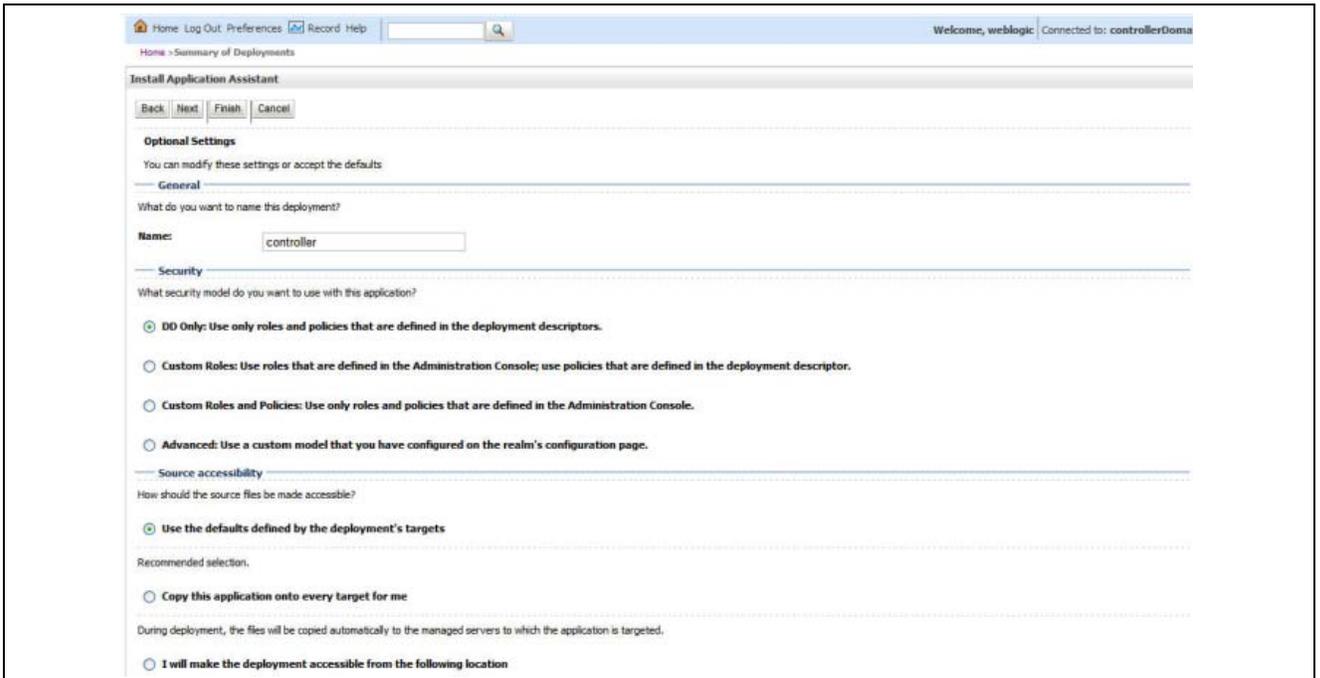
Install Application Assistant - Controller.war file option

5. Click Next. The Install Application Assistant page appears, as shown in the following example:



Install Application Assistant showing option Install this deployment as an application selected

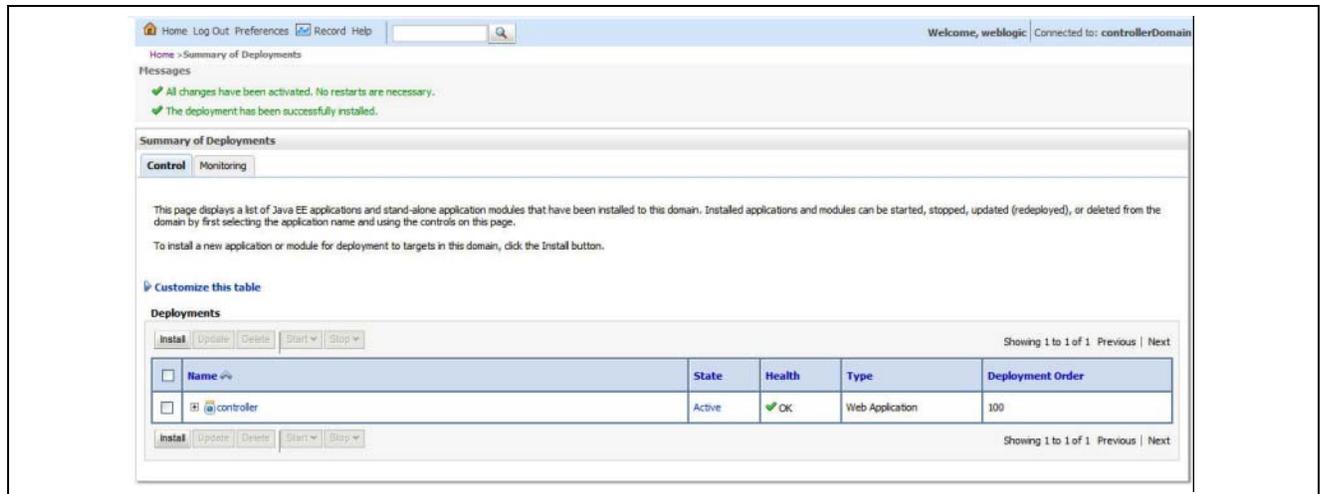
6. Select the option Install this deployment as an application.
7. Click Next. The Install Application Assistant showing the defaults selected appears, as shown in the following example:



Install Application Assistant - default options selected

8. Accept all default options (development mode).
9. Click the Finish button.

If your deployment is performed correctly, the Summary of Deployments page showing the correct details appears, as shown in the following example:



Summary of Deployments page

## Task 13-2: Installing the Oracle WebLogic Controller on Microsoft Windows

This section discusses:

- Installing the PeopleSoft Advanced Configurator
- Exporting the Configuration and Running the AE Program
- Installing the PeopleSoft Visual Modeler 9.1
- Updating JNDIDBName.properties
- Compiling the ProductCatalogueRepository Model
- Using Web Based Compilation for the Model
- Creating the Oracle WebLogic Controller Domain on Microsoft Windows
- Creating the WebApplications Folder Under the Controller Domain
- Modifying the Webservices Properties File (webservices.properties)
- Modifying the Application Properties File (application.properties)
- Deploying the Oracle WebLogic Controller Application

### Task 13-2-1: Installing the PeopleSoft Advanced Configurator

Install the PeopleSoft Advanced Configurator server on your Microsoft Windows system. Detailed instructions for Microsoft Windows are included in the PeopleSoft Advanced Configurator 9.1 documentation that is included within this installation guide.

See "Installing the PeopleSoft Advanced Configurator 9.1"

This chapter appears earlier in this installation guide.

Verify that the PeopleSoft Advanced Configurator server is started by navigating to *http://<configurator server>:7777/*.

## Task 13-2-2: Exporting the Configuration and Running the AE Program

To export the configuration and run the Application Engine (AE) program:

1. Login to PeopleSoft Pure Internet Architecture for the target PeopleSoft environment.
2. Select Set Up CRM, Product Related, Advanced Configurator, Export Configuration.
3. Click Add a new value. Enter a Run Control ID and click Add.

The Export Product Definitions page appears.

4. Enter a value in the Request ID field.
5. Click the Run button to run the AE program (APC\_PC\_EXP) using the default settings, and then click OK.

## Task 13-2-3: Installing the PeopleSoft Visual Modeler 9.1

To install the PeopleSoft Visual Modeler:

See "Installing the PeopleSoft Advanced Configurator," Installing the PeopleSoft Visual Modeler 9.1.

## Task 13-2-4: Updating JNDIDBName.properties

To update the JNDIDBName.properties:

1. Ensure that APC (PeopleSoft Advanced Configurator) Server instance is not running; shut down the server.
2. Set up the APC (PeopleSoft Advanced Configurator) database connection by editing the file *<WEBLOGIC\_HOME>\Config\CalicoDomain\applications\CalicoApp\WEB-INF\config\JNDIDBName.properties*.

The JNDIDBName.properties file should look similar to this example:

```
# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database=>
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
db2db.url=jdbc:db2://[HostName]:[PortNumber]/[DatabaseName]
db2db.driver=com.ibm.db2.jcc.DB2Driver
db2db.username=[username]
```

```

db2db.password=[password]

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4

```

### 3. Edit the values of the database platform for your respective database:

For SQL Server: replace sqldb with your Sql Server database name.  
 For Oracle: replace oracledb with your Oracle database name.  
 For DB2: replace db2db with your DB2 database name.

Replace the url settings for your platform with your appropriate values.  
 Replace [username] for your platform with your database owner ID.  
 Replace [password] for your platform with your database owner ID password.

The PSCFG settings should already be configured based on the settings that you entered during the installation of the APC (PeopleSoft Advanced Configurator) server. The PSCFG settings should match the database settings that you just modified for your respective platform.

### 4. The following JNDIDBName.properties file is an example after it has been modified for a DB2 database:

```

# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database=>
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
CR91USHP.url=jdbc:db2://ui-lnx09:60003/CR91USHP
CR91USHP.driver=com.ibm.db2.jcc.DB2Driver
CR91USHP.username=upgtest4
CR91USHP.password=upgtest4

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4

```

5. After you complete the modifications, restart the APC (PeopleSoft Advanced Configurator) server instance.

## Task 13-2-5: Compiling the ProductCatalogueRepository Model

To compile the *ProductCatalogueRepository* model with the PeopleSoft Visual Modeler, perform these steps:

1. Start the PeopleSoft Visual Modeler 9.1 application.

Close the dialog box upon startup if it appears.

2. Click File, Open Workspace. Open the model's workspace file.

The location of this file is :

```
<WEBLOGIC_HOME>\config\CalicoDomain\install\controller\ViM-model\<MODEL_TYPE>\ProductCatalogueRepository\ProductCatalogueRepository.csw
```

---

**Note.** The *<MODEL\_TYPE>* depends on what you are installing. The models are contained in these folders:

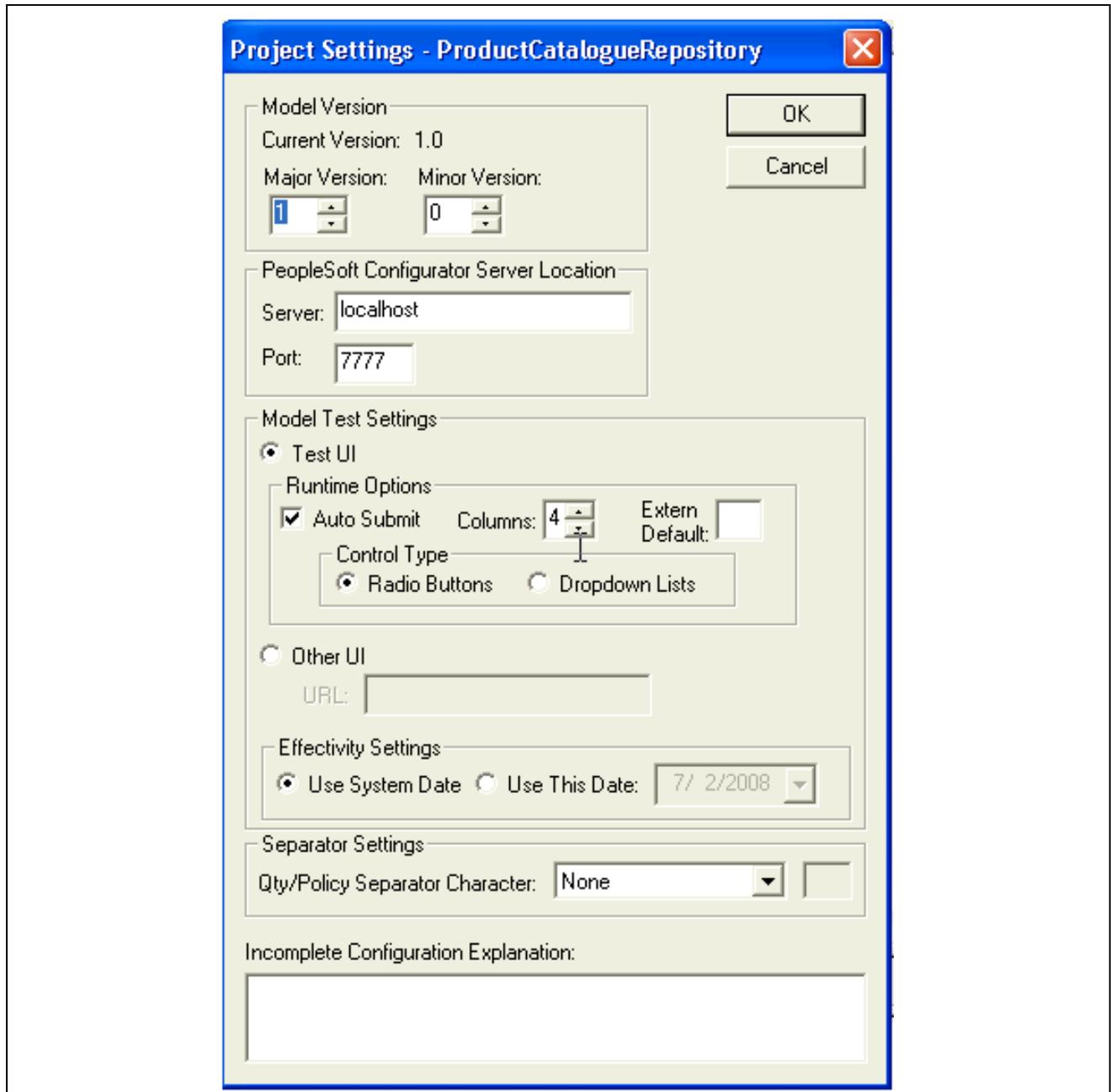
For DB2 and MSS, access the *mss\_2008* directory.

For Oracle, access the *oracle* directory.

---

3. A database connection dialog box appears. Enter your database connection information, and then click the Retry button.
4. From the menu, select Project, Settings to open the Project Settings dialog box.
5. Define the PeopleSoft Configurator Server Location with the proper values that point to the APC (PeopleSoft Advanced Configurator) server instance.

The following is an example of the Project Settings - Product Catalogue Repository dialog box showing example settings:



Project Settings - Product Catalogue Repository

6. Click OK to save the settings.
7. Click the Compile icon (hover to locate the *Compile the model* icon) on the PeopleSoft Visual Modeler menu.
8. Verify that you receive no errors. Warnings are okay.  
These warnings are due to related language entry and can be ignored.

## Task 13-2-6: Using Web Based Compilation for the Model

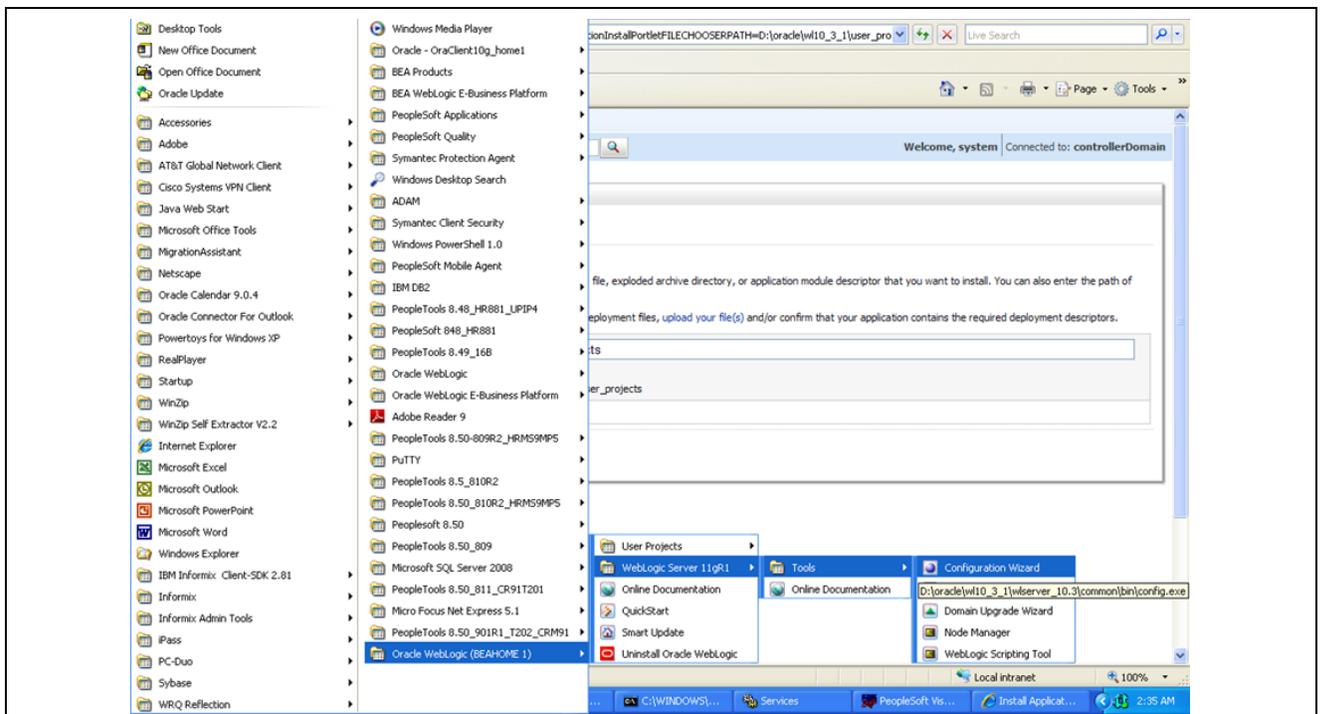
To compile the model using the web:

1. Access the PeopleSoft Advanced Configurator Server by navigating to `http://<configurator server>:7777/`
2. Click the Administration link to view the details and timestamp of the model that you just compiled.
3. Click the Browse button to locate and select the XML file from the ProductCatalogueRepository.  
It is important that you select the latest precompiled XML file. For example: `C:\<WEBLOGIC_HOME>\config\CalicoDomain\applications\CalicoApp\WEB-INF\models\ProductCatalogueRepository\1\0\0\20090422-154308-530\XML`
4. Select the Generate self-contained model check box.
5. Click the Compile Model button.
6. Verify that you received the message “Model compilation completed successfully.”

## Task 13-2-7: Creating the Oracle WebLogic Controller Domain on Microsoft Windows

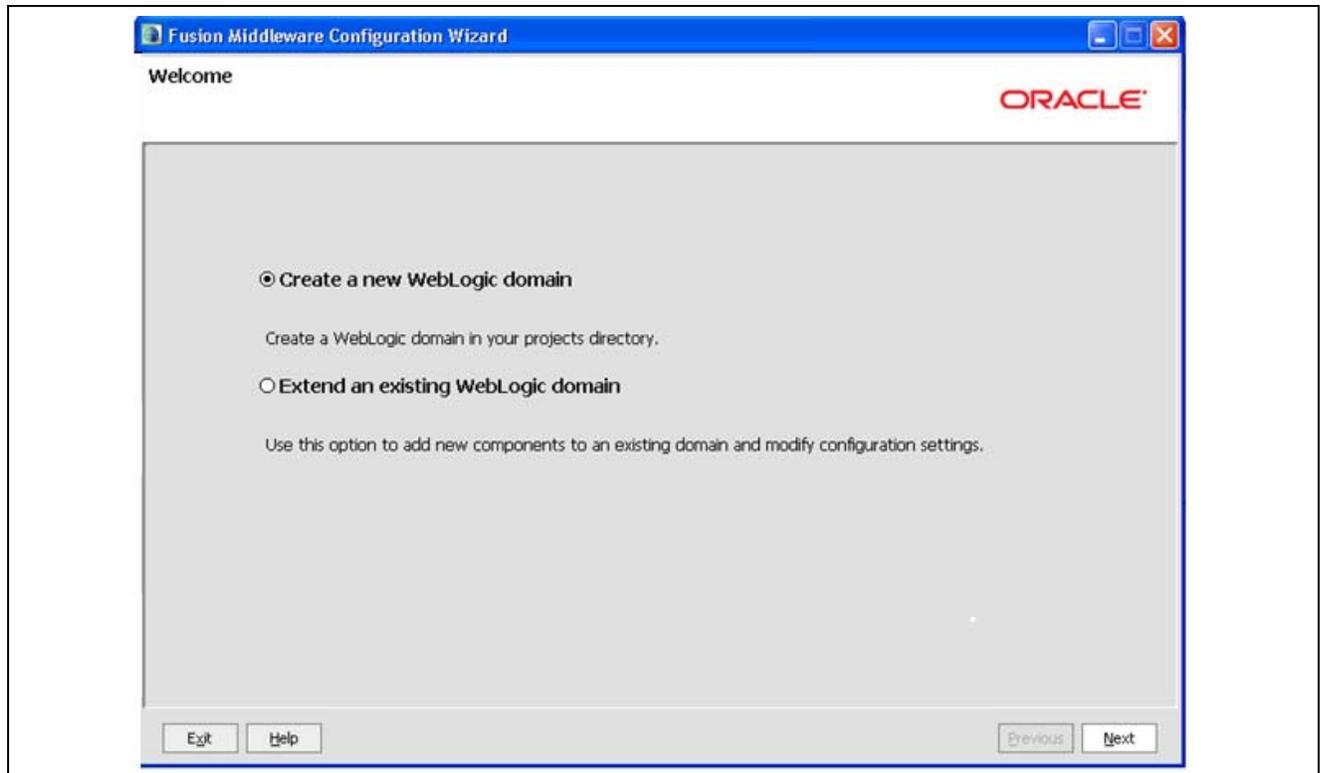
Create a new Oracle WebLogic domain using Oracle’s Fusion Middleware Configuration Wizard:

1. From your Start menu, select Programs, Oracle WebLogic, WebLogic Server 11gR1, Tools, Configuration Wizard, as shown in the following example that shows the navigation path to Oracle’s Fusion Middleware Configuration Wizard:



Path to Oracle’s Fusion Middleware Configuration Wizard

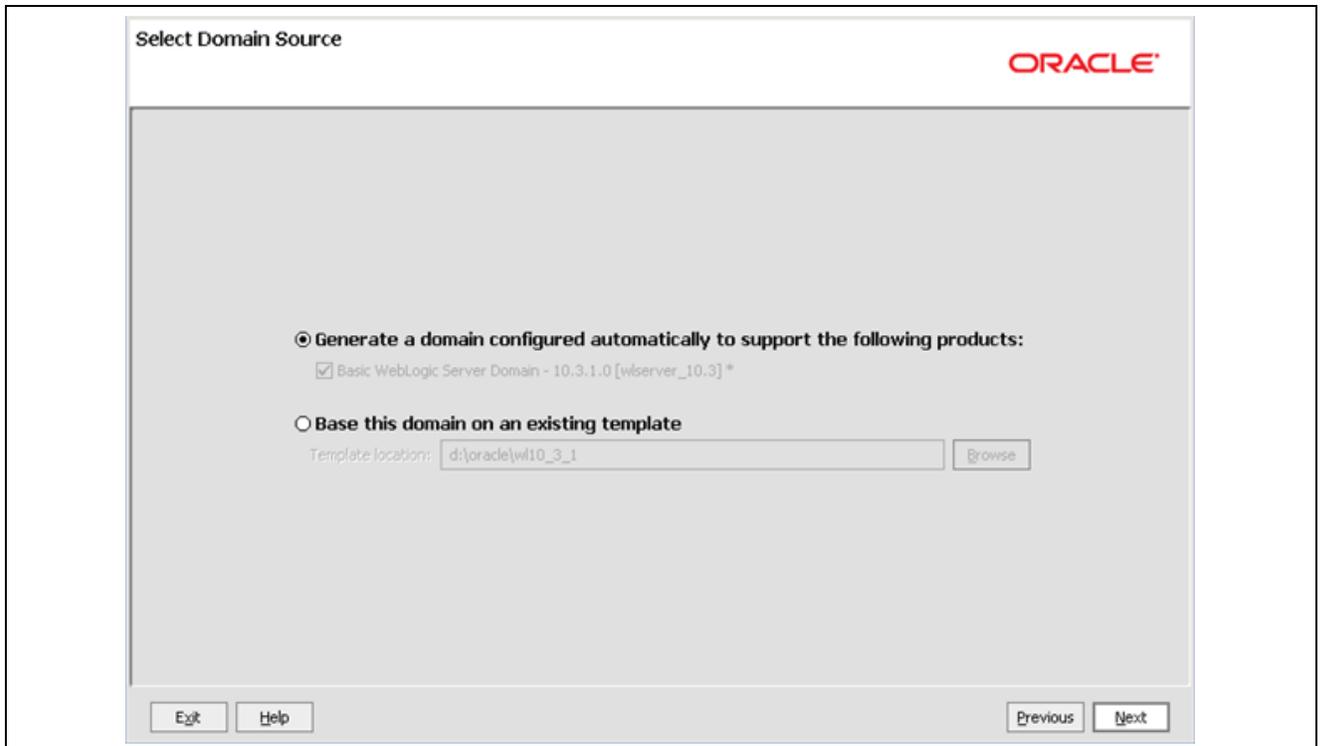
The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware: Configuration Wizard - Welcome page

2. On the Fusion Middleware Configuration Wizard Welcome page, select the Create a new WebLogic domain option.
3. Click Next.

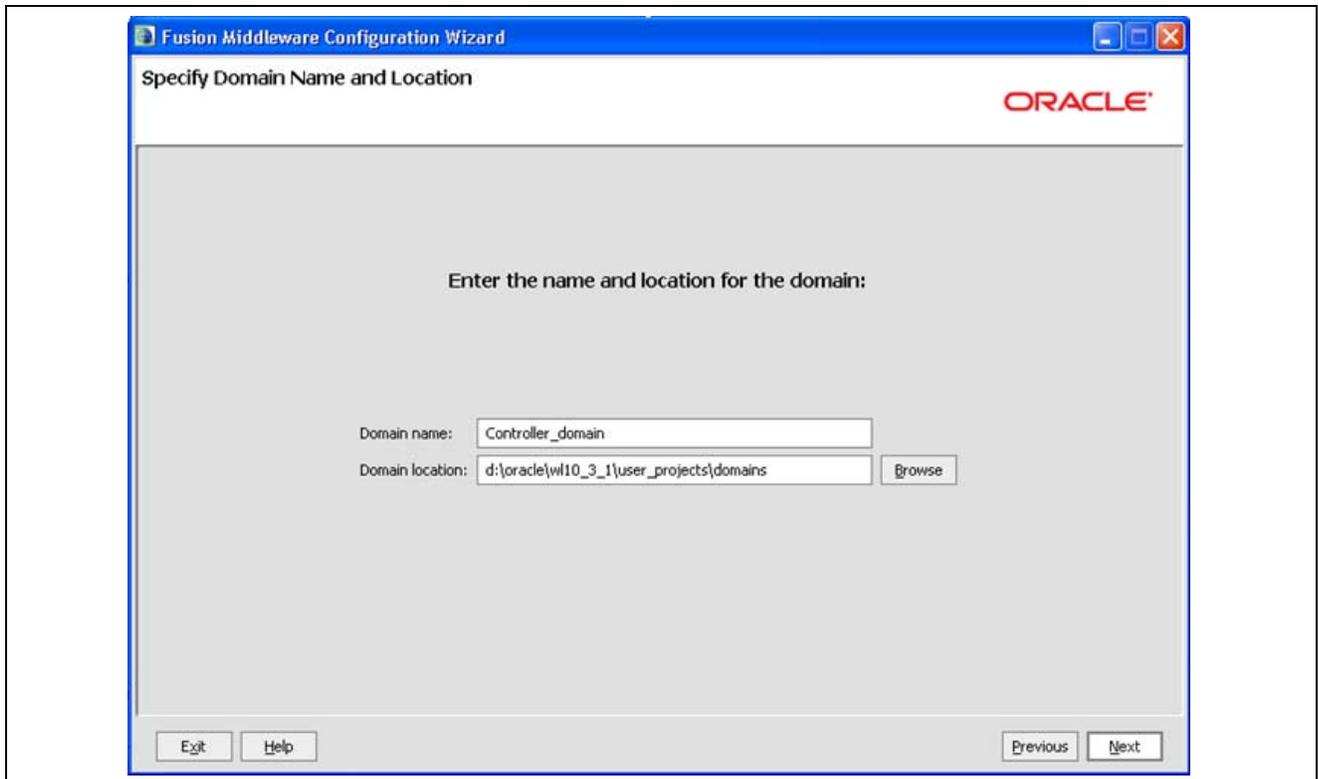
The Fusion Middleware Configuration Wizard - Select Domain Source page appears, as shown in the following example:



Fusion Middleware: Configuration Wizard - Select Domain Source page

4. On the Fusion Middleware Configuration Wizard - Select Domain Source page, select the Generate a domain configured automatically to support the following products option, and then select the WebLogic Server check box.
5. Click Next.

The Fusion Middleware Configuration Wizard - Create WebLogic Domain page appears, as shown in the following example:

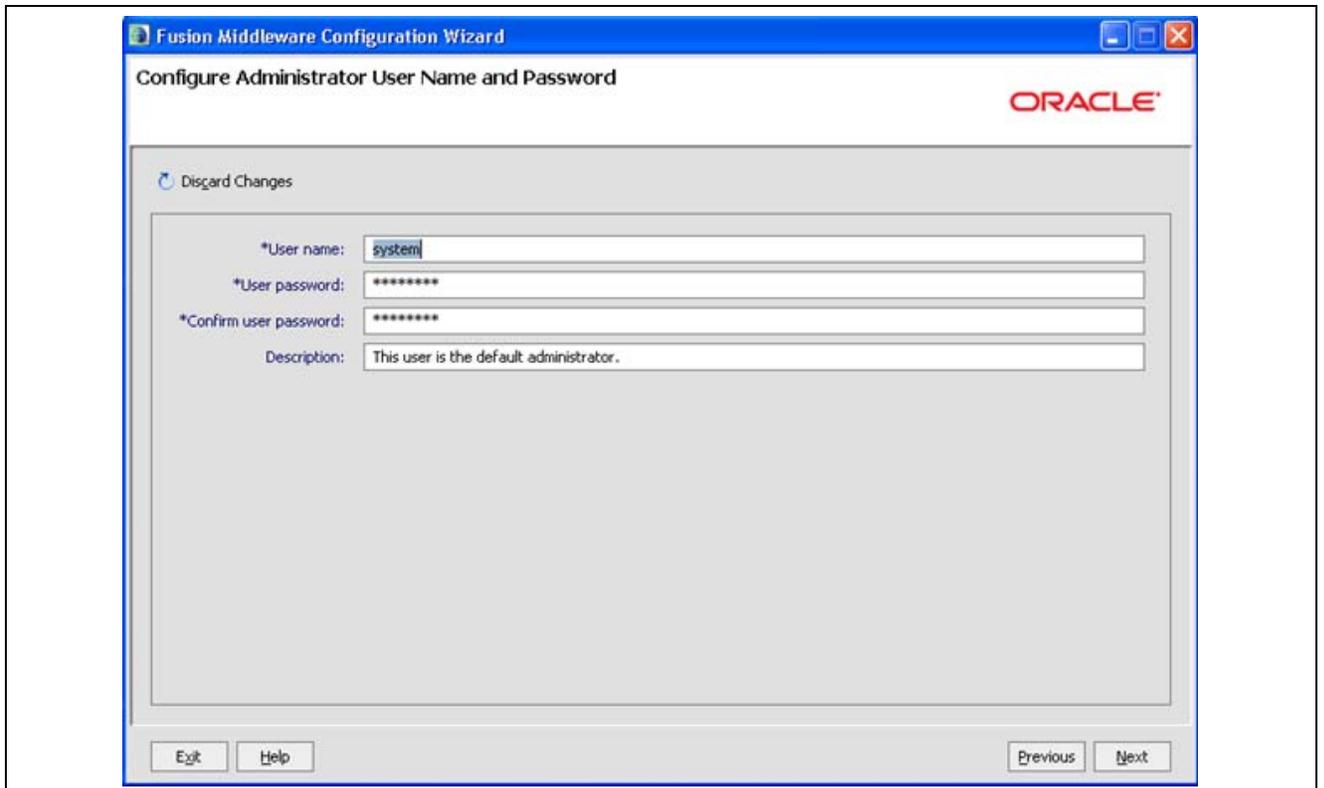


Fusion Middleware Configuration Wizard - Create WebLogic Domain page

6. Enter the domain name that you want and the domain location.

In this example, *Controller\_domain* is entered in the Domain name field and *d:\oracle\wl10\_3\_1\user\_projects\domains* is entered in the Domain location field.

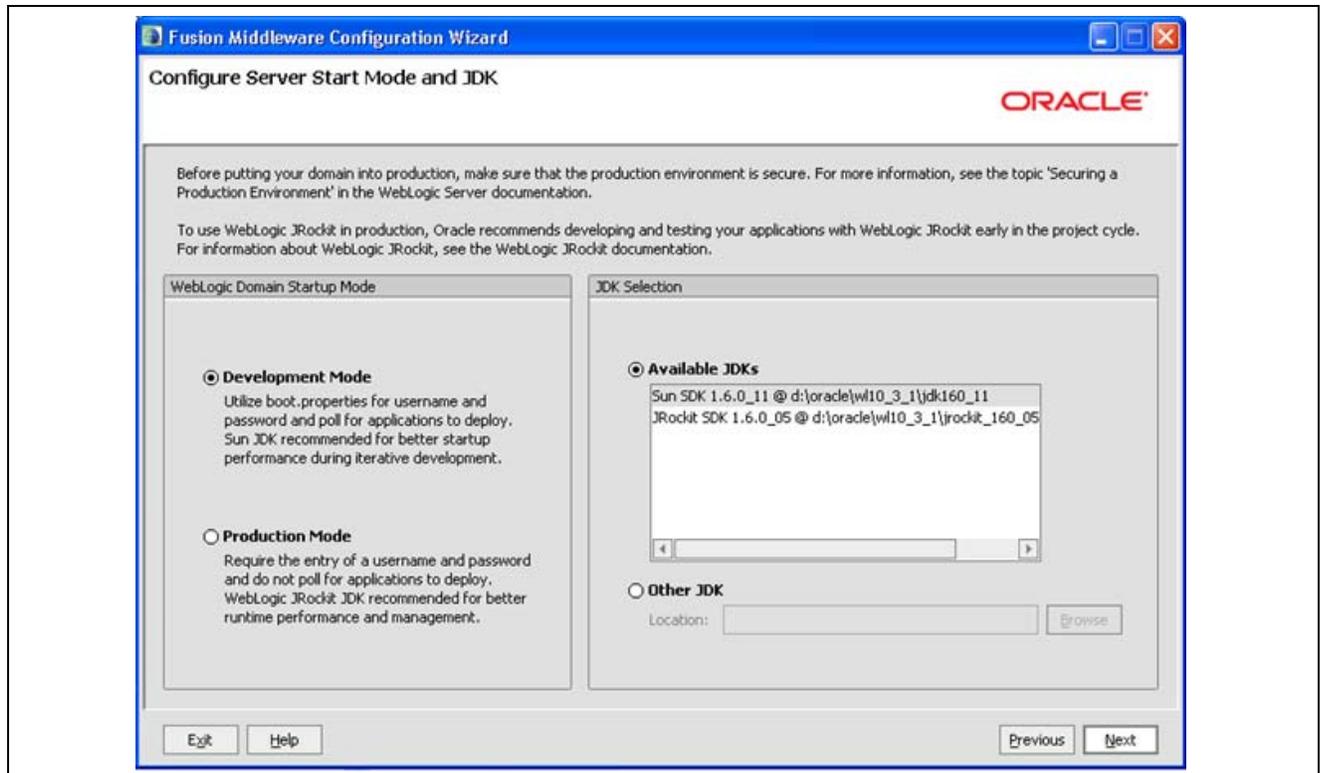
7. Click Next. The Fusion Middleware Configuration Wizard - Configure Administrator Username and Password page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page

8. Enter your administrator username and password.
9. Click Next.

The Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page appears, as shown in the following example:



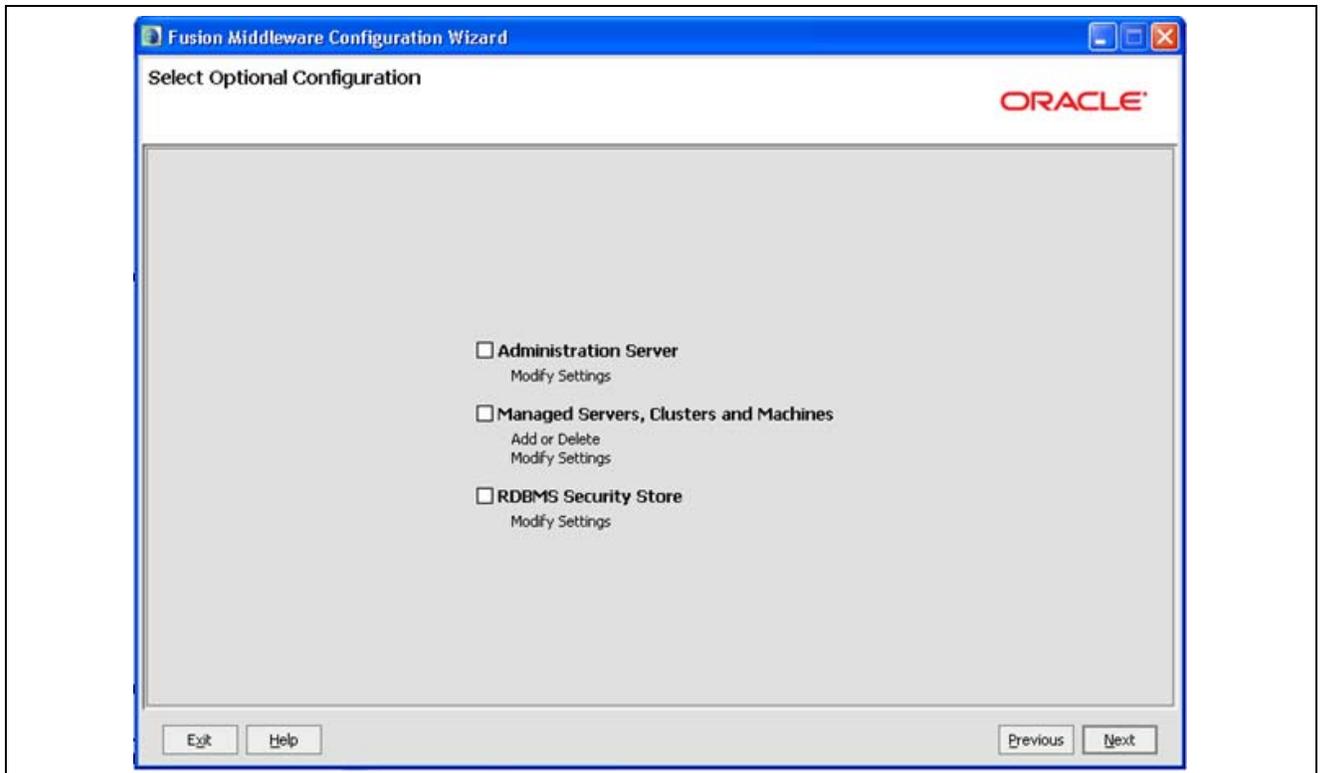
Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page

10. On the Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page, in the WebLogic Domain Startup Mode section, select either the Development Mode option or the Production Mode option, depending on your intended final use of this domain.

In this example, the Development Mode option is selected and a development platform will be installed.

11. In the JDK Selection section, select the Available JDKs option, and then select *JDK 1.6*.
12. Click Next.

The Fusion Middleware: Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



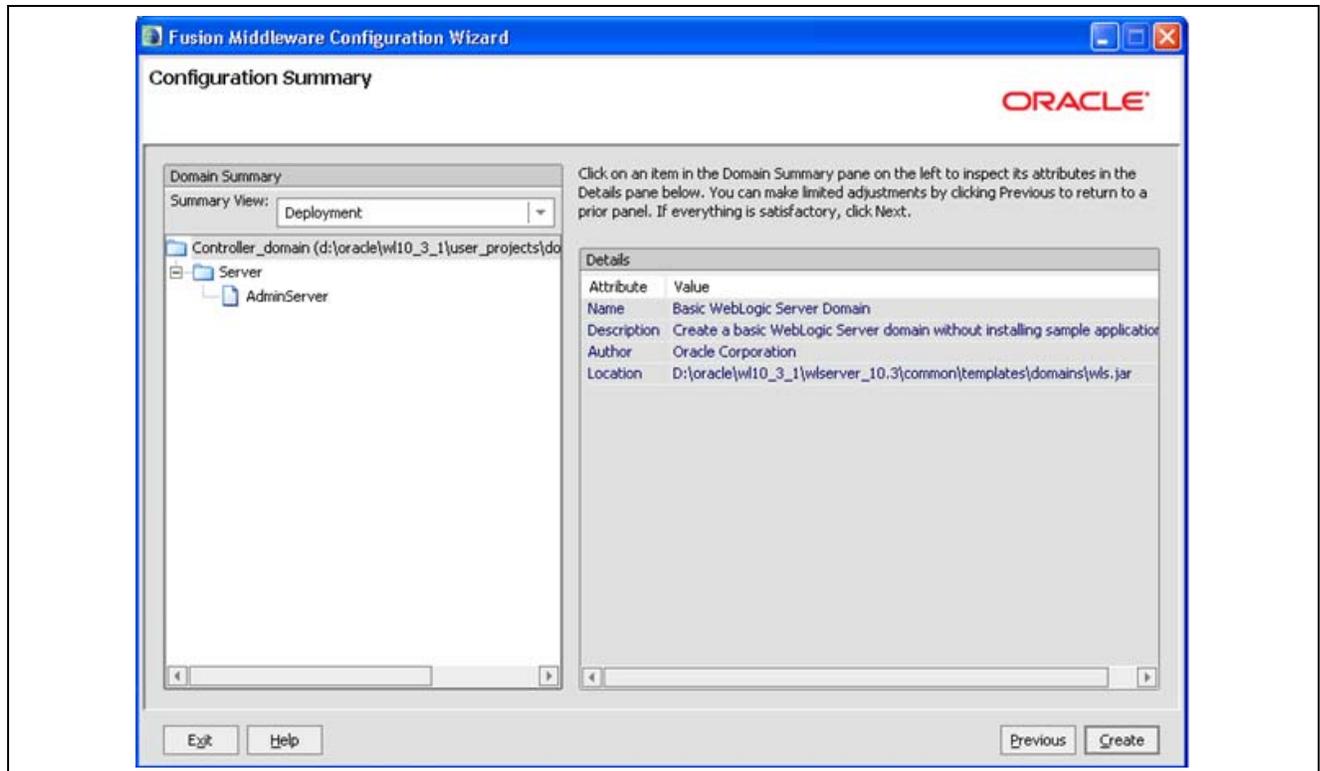
Fusion Middleware: Configuration Wizard - Select Optional Configuration page

13. On the Fusion Middleware: Configuration Wizard - Select Optional Configuration page, select the configuration that you want.

Additional configuration pages may appear, depending on your selections. Enter your appropriate values in those pages.

14. Click Next.

The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configuration Summary page

15. Review your configuration, and then click the Create button.

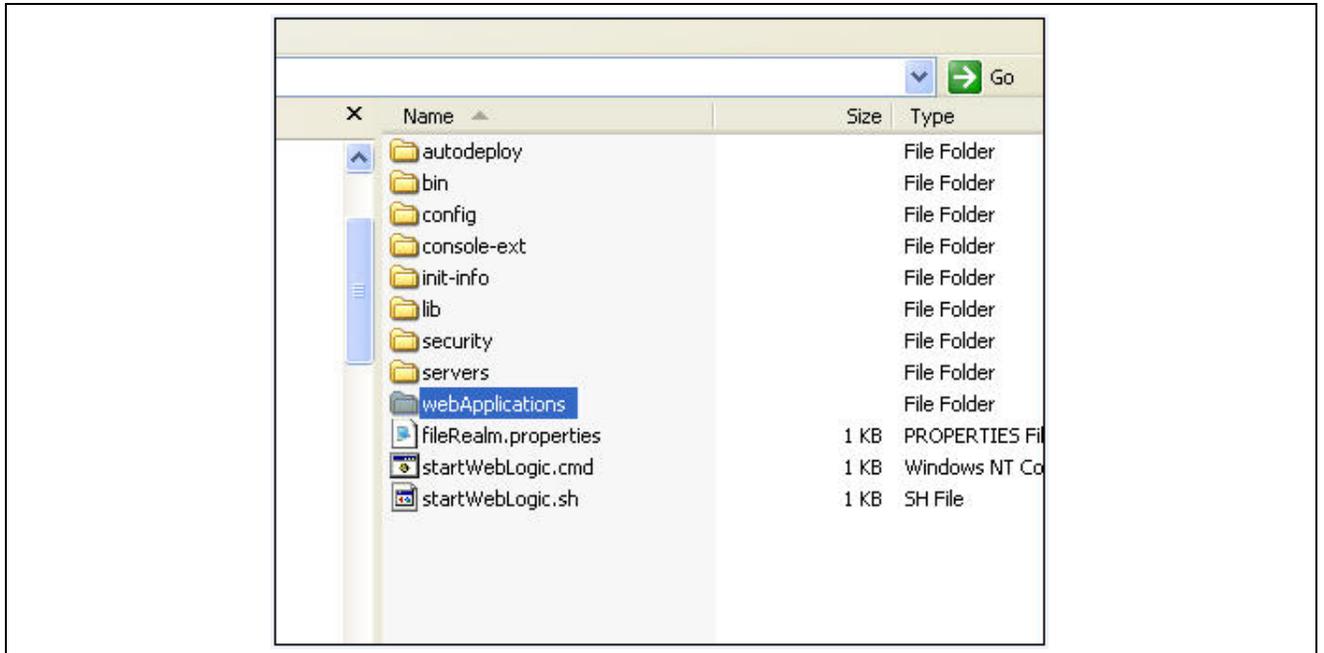
The Fusion Middleware Configuration Wizard - Creating Domain page appears and shows you the progress of the domain creation.

16. On the Fusion Middleware Configuration Wizard - Creating Domain page, select the Start Admin Server check box, and then click Done.
17. To start or stop this domain yourself at a later time, go to the Domain Location (this path displays on the Fusion Middleware Configuration Wizard - Creating Domain page while in progress and is the location that you specified on the Fusion Middleware Configuration Wizard - Create WebLogic Domain page), and enter the command *startWebLogic.cmd*.

## Task 13-2-8: Creating the WebApplications Folder Under the Controller Domain

To create the WebApplications folder under the Oracle WebLogic Controller Domain:

1. Under your newly created Controller domain, create a new folder named *webApplications*, as shown in the following example:



Controller domain - webApplications folder

2. Copy the *controller.war* file from `<WEBLOGIC_HOME>\config\CalicoDomain\install\controller` to your `<ControllerDomain>\webApplications` folder.
3. Copy the “*ressources*” folder from `<WEBLOGIC_HOME>\config\CalicoDomain\install\controller\` to your `<ControllerDomain>\webApplications` folder.

## Task 13-2-9: Modifying the Webservices Properties File (*webservices.properties*)

To modify the *webservices.properties* file:

1. Edit the *webservice.properties* file, located in: `<ControllerDomain>\webApplications\ressources\controller`
2. Modify the IP address of all four of the URL entries (listed in the *webservices.properties* file) with your PeopleSoft Gateway URL and Port.

## Task 13-2-10: Modifying the Application Properties File (*application.properties*)

To modify the *application.properties* file:

1. Edit the *application.properties* file, located in: `<ControllerDomain>\webApplications\ressources\controller`:
2. Modify the *configuratorCalico.root* path to point to your WEBLOGIC\_HOME directory.

```
# ORCL_SAMPLE
#path to use for the config, dtd and logs of calico
configuratorCalico.root=C:/bea/wlserver_10.3/config/CalicoDomain/applications=>
/CalicoApp/WEB-INF
configuratorCalico.server=weblogic
```

---

**Note.** If your configurator is in a Microsoft Windows environment, ensure that you use the “/” convention like the example above when you modify the path.

---

## Task 13-2-11: Deploying the Oracle WebLogic Controller Application

To deploy the Oracle WebLogic Controller application:

1. Start the server, if it is not already started, using the *startWeblogic.cmd* in your *ControllerDomain* directory.
2. Go to your Oracle WebLogic Server Administration Console: *http://localhost:7001/console*

---

**Note.** 7001 is the *default* port for the Controller application. Your port value may vary, depending on your configuration.

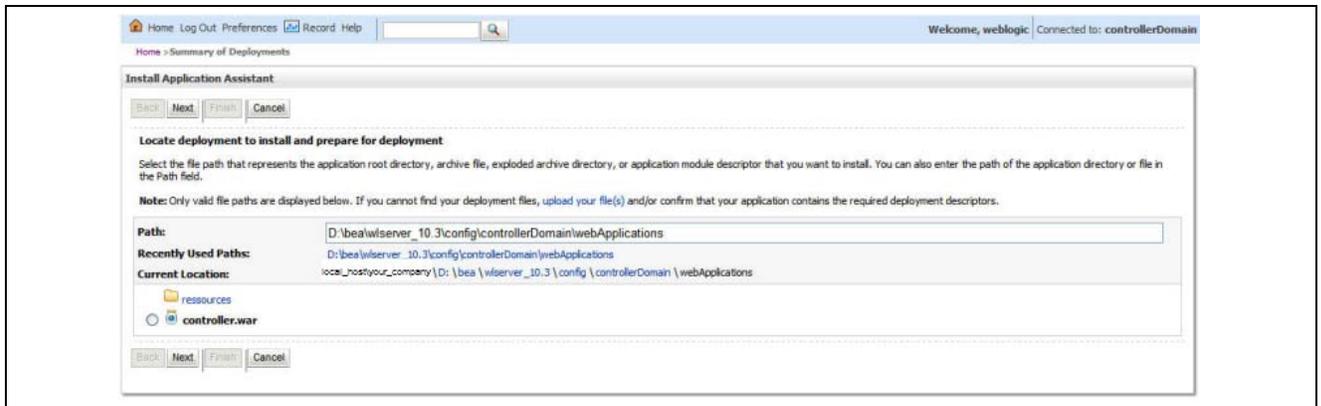
---

Log in to the Oracle WebLogic Administration Console, as shown in the following example:



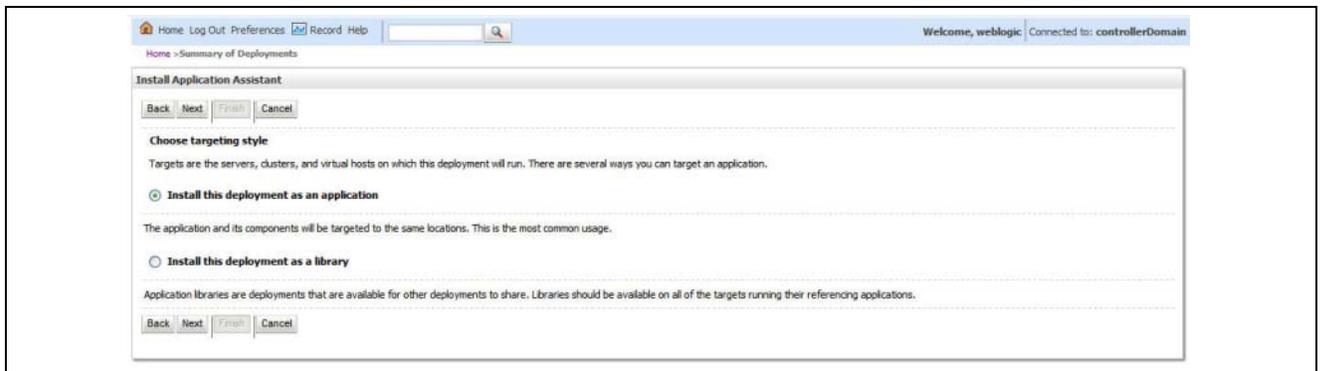
Oracle WebLogic Server Administration Console - Log In page

3. On the Oracle WebLogic Administration Console page, click Deployments in your Domain Structure tree, and then click the Install button.
4. Navigate to and select the *controller.war* file that you previously placed in the *<ControllerDomain>\webApplications* directory, as shown in the following example:



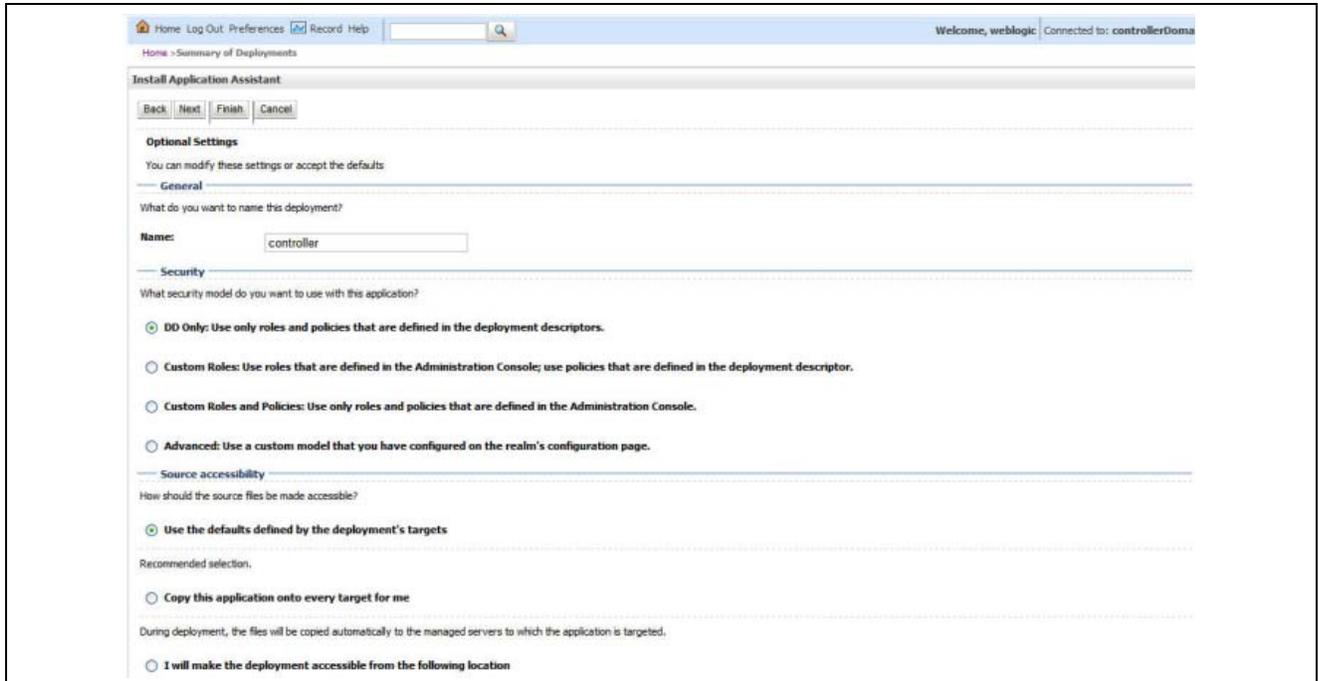
Install Application Assistant - controller.war file option selected

- Click Next. The Install Application Assistant showing the option Install this deployment as an application appears, as shown in the following example:



Install Application Assistant - Install this deployment as an application option selected

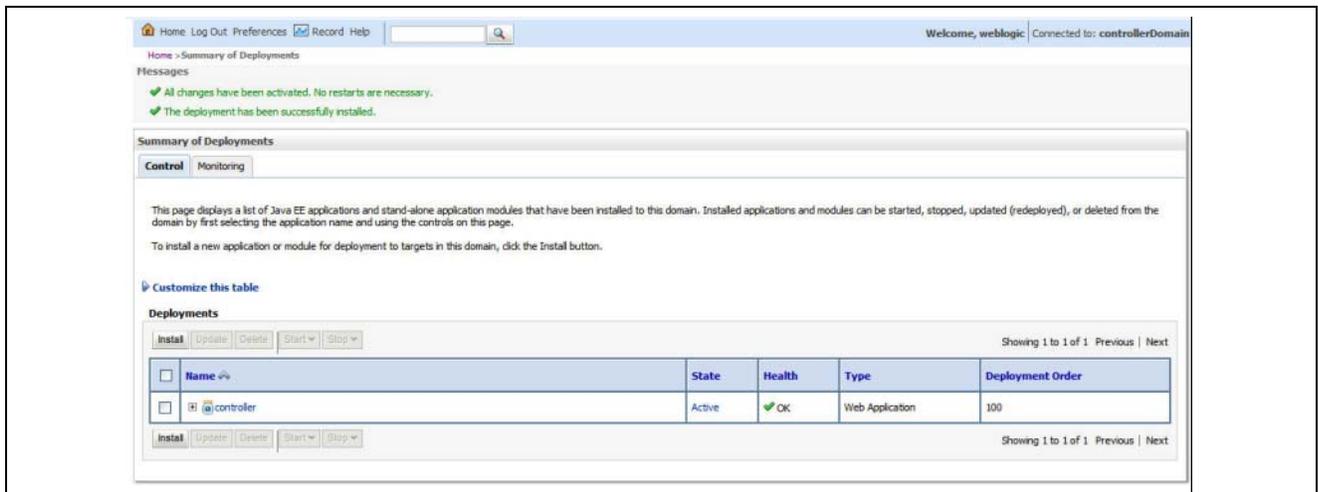
- Select the option Install this deployment as an application.
- Click Next. The Install Application Assistant showing the default options selected appears, as shown in the following example:



Install Application Assistant - Default options selected

8. Accept all default options (development mode).
9. Click the Finish button.

If your deployment is performed correctly, the Summary of Deployments page showing the correct details appears, as shown in the following example:



Summary of Deployments page

## Task 13-3: Configuring and Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

This section discusses:

- Configuring the Configurator Connection on PeopleSoft Pure Internet Architecture
- Activating Web Services Required for the Controller
- Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

## Task 13-3-1: Configuring the Configurator Connection on PeopleSoft Pure Internet Architecture

To set up and configure the PeopleSoft Advanced Configurator connection on PeopleSoft Pure Internet Architecture:

1. Log in to the front end (PeopleSoft Pure Internet Architecture) of the target PeopleSoft environment.
2. Select PeopleTools, Integration Broker , Integration Setup, Nodes.
3. Search for and open the *PSFT\_CFG\_APC* node.
4. Click the Connectors tab to access the Connectors page.
5. Edit the property with the Property ID that equals PRIMARYURL *http://<WLCONTROLLER\_IP:PORT>/Configurator/com/oracle/ps/gui/jpf/begin.do?ping=true* by substituting *<WLCONTROLLER\_IP:PORT>* with the IP and Port of the newly created WebLogic ControllerDomain.

---

**Note.** Ensure that you enter your *Controller* port number here, *not* your Configurator port number. This is true for the remainder of this task.

---

6. Click Save. Click the Ping Node button to verify that it returned a success message.
7. Select PeopleTools, Integration Broker, Integration Setup, Services.
8. Search for and open the service named *VALIDATORSERVICE*.
9. Edit the Namespace field:  
*http://<WLCONTROLLER\_IP:PORT>/Configurator/services/Validation* by substituting *<WLCONTROLLER\_IP:PORT>* with the IP and Port of the newly created WebLogic ControllerDomain.
10. Click Save.
11. Click OK.
12. Select PeopleTools, Integration Broker , Integration Setup, Routings.
13. Search for the routing using the Routing Name: *~IMPORTED~29755*
14. Select the Connector Properties tab to access the Connector Properties page.
15. Edit the PRIMARYURL property : *http://<WLCONTROLLER\_IP:PORT>/Configurator/services/Validation* by substituting *<WLCONTROLLER\_IP:PORT>* with the IP and Port of the newly created WebLogic ControllerDomain.
16. Click Save.
17. Click OK.

## Task 13-3-2: Activating Web Services Required for the Controller

The Oracle WebLogic Controller exchanges data with PeopleSoft Pure Internet Architecture by way of web service request/response messaging. You must activate these web services to avoid errors during the Oracle WebLogic Controller session. These required web services include:

- RBT\_BILLING\_ACCOUNT
- RF\_INST\_PRODUCT
- RB\_CUSTOMER
- VALIDATORSERVICE

To activate these services, their handlers, and their routings:

1. Select PeopleTools, Integration Broker , Integration Setup, Services.
2. Search for and open *RBT\_BILLING\_ACCOUNT*.
3. Scroll down to the Existing Operations grid at the bottom of the page, as shown in the following example:

Operation.Default Version	Description	Active	Operation Type
<a href="#">RBT_ACCOUNT_GET_ACCOUNT.VERSION_1</a>	Version One	<input checked="" type="checkbox"/>	Synch
<a href="#">RBT_ACCOUNT_SEARCH_ACCOUNT.VERSION_1</a>	Version One	<input checked="" type="checkbox"/>	Synch
<a href="#">RBT_ACCT_CONVERT.V1</a>	Complete Account Conversion	<input checked="" type="checkbox"/>	Synch
<a href="#">RBT_ACCT_LINK.V1</a>	Link Accounts	<input checked="" type="checkbox"/>	Synch
<a href="#">RBT_ACCT_UPDT.V1</a>	Update Account	<input checked="" type="checkbox"/>	Synch
<a href="#">RBT_BILLING_ACCOUNT_CREATE.V1</a>	Billing Account Create	<input checked="" type="checkbox"/>	Synch

Existing Operations - Operation tab

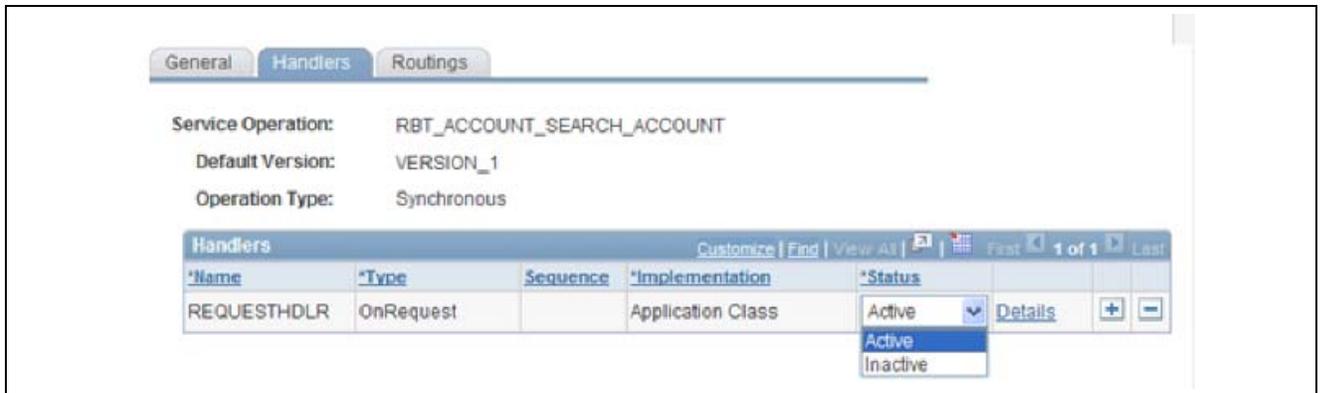
4. Click the first Operation to open the Service Operation definition.
5. Select the Active check box, as shown in the following example:

General | Handlers | Routings

Service Operation: RBT\_ACCOUNT\_GET\_ACCOUNT  
 Operation Type: Synchronous  
 \*Operation Description: RbtGetAccount  
 Operation Comments:   
 Object Owner ID: Gen Opt/Common  
 Operation Alias:   
 \*Security Verification: None  
 User/Password Required:   
 Default Service Operation Version  
 \*Version: VERSION\_1  Default  Active

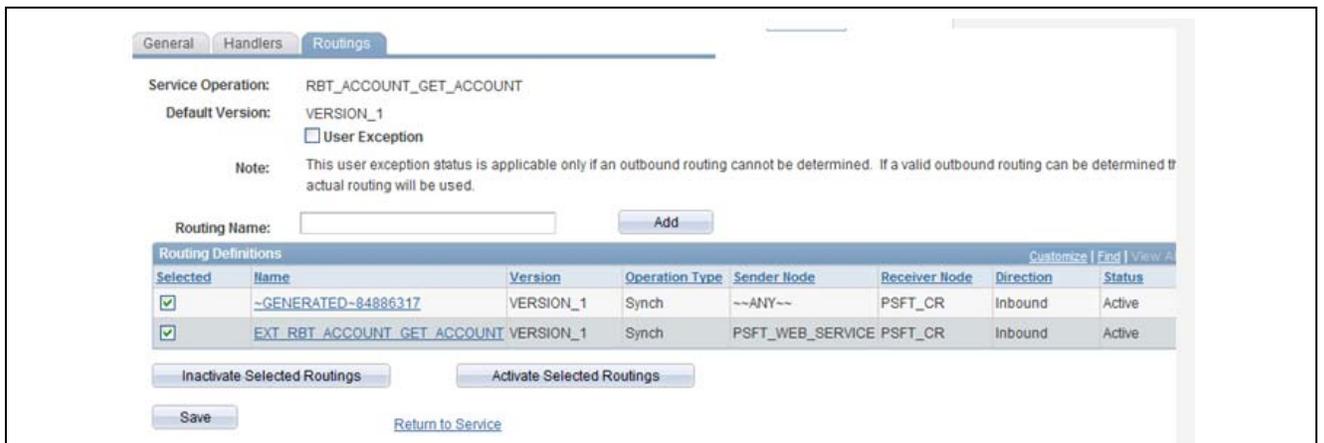
Service Operations - General page

6. Select the Handlers tab.
7. Update the Handler status to *Active*, as shown in the following example:



Service Operations - Handlers page

8. Click Save.
9. Select the Routings tab.
10. Select the check box beside each Routing name, as shown in the following example:



Service Operations - Routings page

11. Click the Activate Selected Routings button.
12. Click Save, and then click OK. Then click the Return to Service link.  
 You will be returned to the Service page.
13. Repeat steps 4 through 8 for the remaining Operations until each one and their Handlers and Routings are Active.
14. Repeat steps 1 through 9 for the remaining Web Services, RF\_INST\_PRODUCT, RB\_CUSTOMER, and VALIDATORSERVICE.

### Task 13-3-3: Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

To verify the Oracle WebLogic Controller on PeopleSoft Pure Internet Architecture:

1. Login as *CSPADMIN/CSPADMIN*.
2. Select Order and Quotes, Add Order (click the first option).
3. Enter *Softgear Inc* in the Customer field.

4. Enter First Name *Ted* and Last Name *Pepper*
5. Click the Search button. From the search results, click the Softgear link.
6. Enter *My Home* in the Add Product(s) field and click the Add button.
7. Click the Configure Product button.
8. The PeopleSoft system should launch an Oracle WebLogic Controller page for My Home.

## CHAPTER 14

# Integrating PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9.0

This chapter discusses:

- Understanding PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9
- Prerequisites
- Setting Up PeopleSoft SA Database for PeopleSoft OLM Integration
- Setting Up PeopleSoft OLM for PeopleSoft SA Integration

---

## Understanding PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9

This chapter provides instructions for integrating Oracle’s PeopleSoft Enterprise Online Marketing (OLM) 9.1 and PeopleSoft Enterprise Student Administration 8.9 and 9.0 (SA 8.9/9.0).

---

**Important!** CRM 9.1 Integrated to Campus Solutions 9.0 Feature Pack 2 provides additional features over CRM 9.1 integrated to earlier versions of Campus Solutions. For more information about this integration, refer to “Appendix B: Getting Started with CRM for Higher Education”, in this documentation.

---

**Note.** Before proceeding with your installation, consult My Oracle Support to ensure that you have the latest version of the following documents: “PeopleSoft Enterprise PeopleTools Installation” guide for your database platform, release 8.50 or higher, and *PeopleSoft Enterprise PeopleTools PeopleBooks* for your current release.

---

**Note.** Consult Oracle’s PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index that can be found on My Oracle Support, 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 9.1 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).

- Ensure that the following items are verified in the PeopleSoft CRM and the PeopleSoft SA databases:
  - a. The service operation for a particular message must be set to *Active*.
  - b. The handler and routing that correspond to the service operation must be set to *Active*.
  - c. Queue corresponding to service operation must be in *Run* status.

---

**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.*

---

## Task 14-1: Setting Up PeopleSoft SA 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 14-1-1: 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 People Tools, Integration Broker, Integration Setup, Nodes.
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 displays the configuration interface for the PSFT\_CR node. 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\_CR' and there is a 'Ping Node' button. A 'Details' section contains 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 details section are 'Save' and 'Return to Search' buttons. A breadcrumb trail at the very bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

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, showing an *Active* status:

Routing Definitions							
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

## 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 14-1-2: 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.

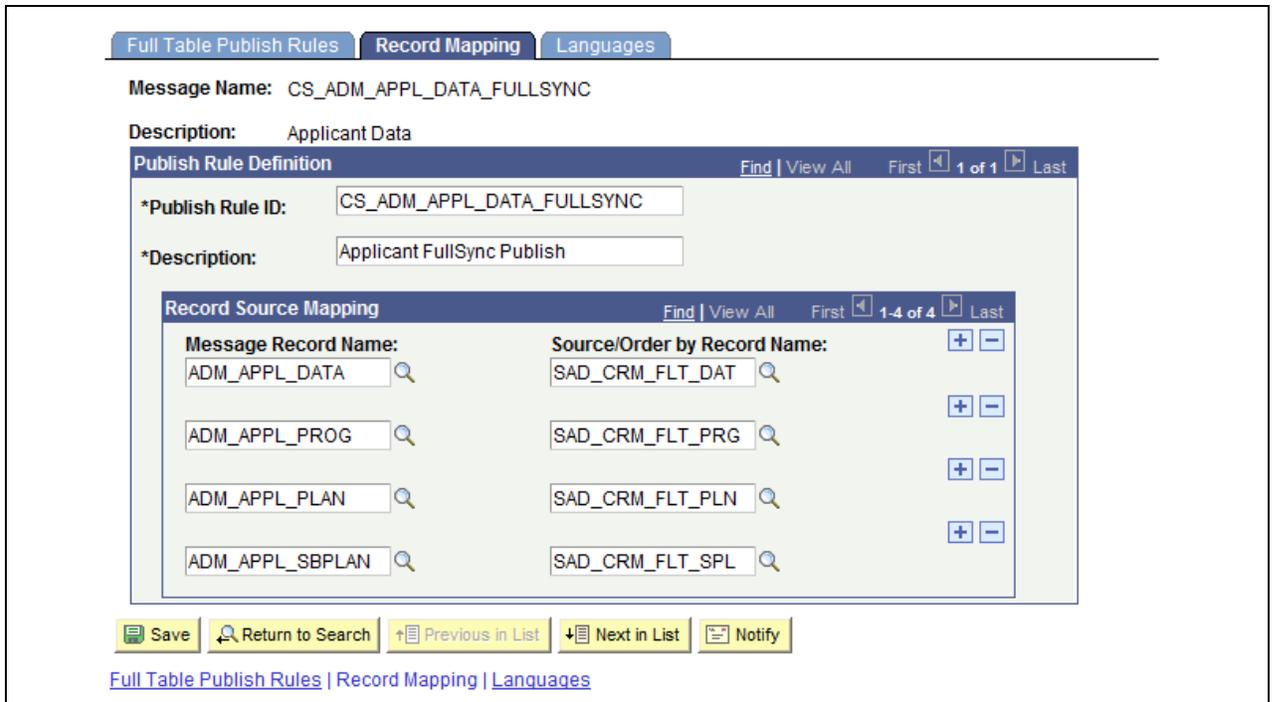
To define full data publish rules:

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 shown in the following example:

The screenshot displays the 'Full Table Publish Rules' configuration page. At the top, there are three tabs: 'Full Table Publish Rules', 'Record Mapping', and 'Languages'. The 'Full Table Publish Rules' tab is selected. Below the tabs, the 'Message Name' is 'CS\_ADM\_APPL\_DATA\_FULLSYNC' and the 'Description' is 'Applicant Data'. The 'Publish Rule Definition' section includes fields for '\*Publish Rule ID' (CS\_ADM\_APPL\_DATA\_FULLSYNC), '\*Description' (Applicant FullSync Publish), and '\*Status' (Active). There are also fields for 'Chunking Rule ID' and 'Alternate Chunk'. Below these fields are two sections: 'Message Options' with a checked 'Create Message Header' checkbox and an unchecked 'Create Message Trailer' checkbox, and 'Output Format' with radio buttons for 'Message', 'Flat File', and 'Flat File with Control Record'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. The page footer shows the navigation path: '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 information, as shown in the following example:



Example of Record Mapping page

This table lists the Message Record Name and corresponding Source/Order by Record Name:

Message Record Name	Source/Order by Record Name
<i>ADM_APPL_DATA</i>	<i>SAD_CRM_FLT_DAT</i>
<i>ADM_APPL_PROG</i>	<i>SAD_CRM_FLT_PRG</i>
<i>ADM_APPL_PLAN</i>	<i>SAD_CRM_FLT_PLN</i>
<i>ADM_APPL_SBPLAN</i>	<i>SAD_CRM_FLT_SPL</i>

3. Create a rule for each of the messages listed in the following table:

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

---

**Note.** Ensure that you select the Header option for each message.

---

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 Full Table Publish Rules tab and enter a Publish Rule ID and a Description (for example, *Person\_Basic\_Inc*).
  - e. Select *Inactive* from the Status drop-down list.
  - f. In the Message Options section, select the Create Message Header check box.
  - g. 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 using the values listed in the following table:

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_SMTYP_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 14-1-3: Setting Service Operations Security

To set Service Operations Security:

1. Select People Tools, Security, Permissions and Roles, Permissions 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 14-1-4: Granting Security for Application Engine Processes and New Pages

To grant security for Application Engine (AE) processes and new pages:

1. Select People Tools, Security, Permissions and Roles, Permissions 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 9.1.

## Task 14-1-5: 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 14-1-6: 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 14-2: Setting Up PeopleSoft OLM for PeopleSoft SA 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 SA Database
- Populating Profile Attribute Choices from PeopleSoft SA to PeopleSoft CRM
- Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database
- Populating Student Data from PeopleSoft SA to PeopleSoft CRM
- 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 9.1."
- Security Enterprise Integration Point (EIP) settings for the Person Basic Fullsync are set.

See "Installing PeopleSoft Online Marketing 9.1, " Improving Online Marketing Transaction Performance.

## Task 14-2-1: 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>\websrv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\integrationGateway.properties`:

```
ig.isc.CRMNODENAME.serverURL=//CRMAppServerMachine: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`

---

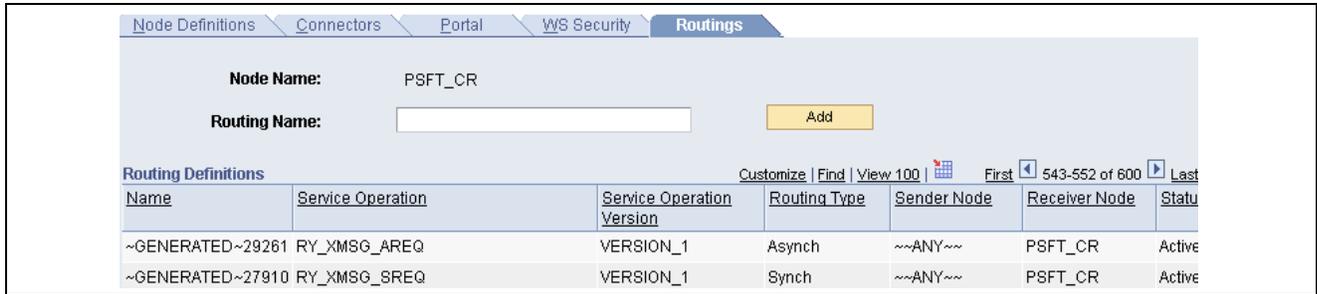
**Note.** Local Gateway properties are set up during the PeopleSoft CRM 9.1 installation.

---

### 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 Default Local Node page are defined and active, as shown in the following example:



Default Local Node page

### Setting Up the Student Administration External Node and Connector

To set up the PeopleSoft SA external node and connector:

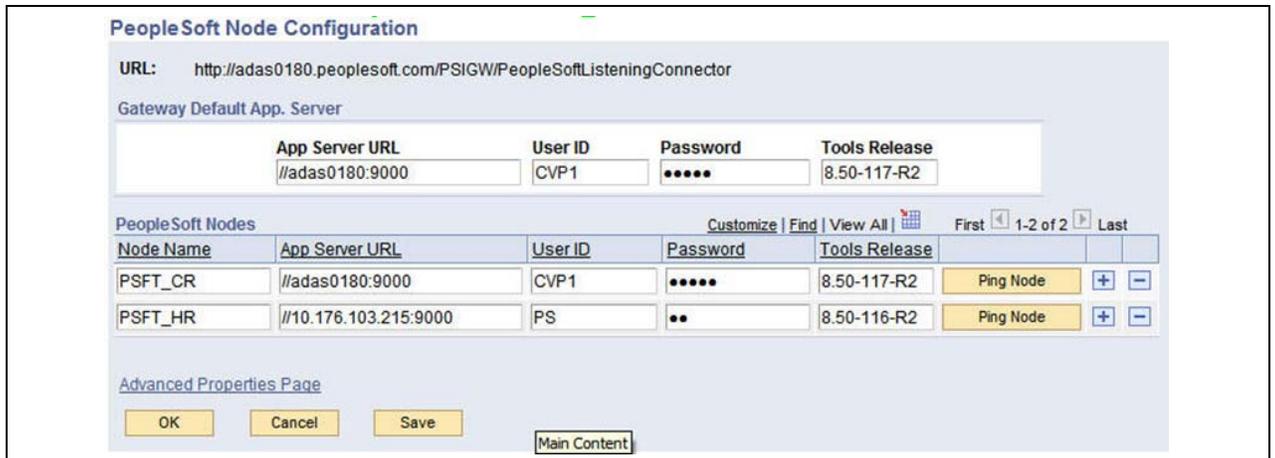
1. Select PeopleTools, Integration Broker, Integration Set up, Nodes.
2. Search for the node PSFT\_HR.
3. Ensure that the Active Node check box is selected.
4. Configure the node connection as follows:
  - a. Select the Connectors tab, and ensure that the Connection ID is set to *PSFTTARGET* for PeopleSoft SA 8.9/9.0.

Example of the Connectors tab:



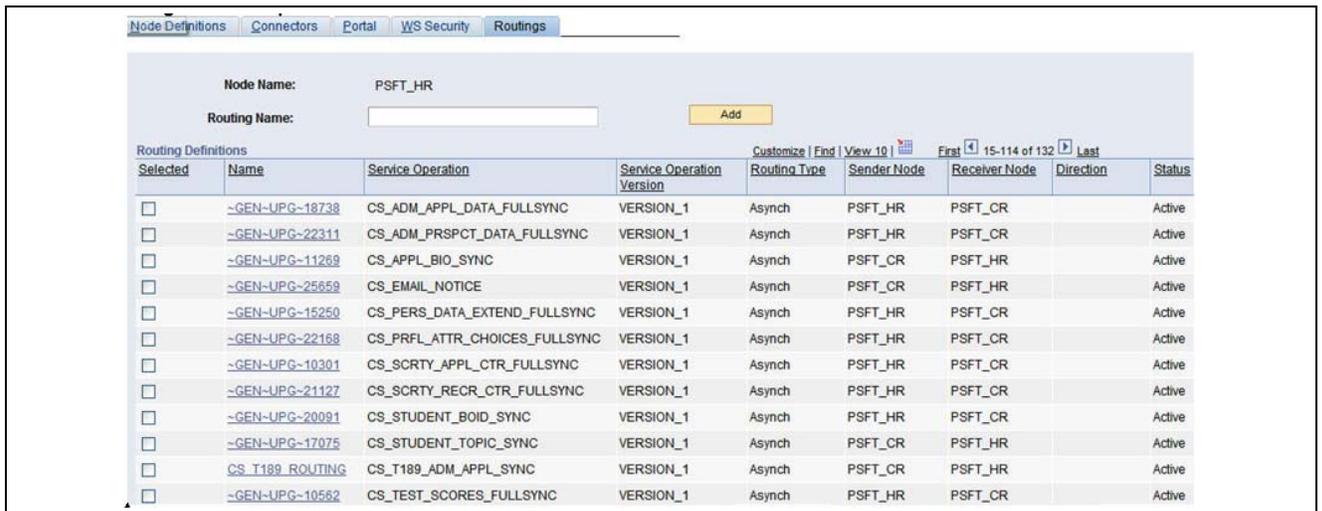
Connectors page

- b. Click the Gateway Setup Properties link to access the PeopleSoft Node Configuration page, as shown in the following example:



PeopleSoft Node Configuration page

- c. Enter the user ID and password, and click OK.
- d. 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, as shown in the following example:



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, as shown in the following example:

**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:** PSFT\_HR Ping Node [Transaction Retry Queue](#)

**Node Information**

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Node Status page - 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 of the PeopleSoft Single Signon page showing the PeopleSoft CRM node CR910QA1 listed as the Local Node:

**Menu**

- PeopleTools
  - Mobile Sync Framework
  - Security
    - User Profiles
    - Permissions & Roles
    - Password Configuration
    - Directory
    - Security Objects
      - User Profile Types
      - Tables to Skip
      - Security Links
      - Digital Certificates
      - Single Signon
      - Signon PeopleCode
    - Query Security
    - Encryption
    - Common Queries
    - Mass Change Operator
  - Utilities
  - Workflow
  - Portal
  - Search Engine
  - Personalization
  - Process Scheduler
  - Cube Manager
  - Application Engine

**Single Signon** New Window | Customize Pa...

**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
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

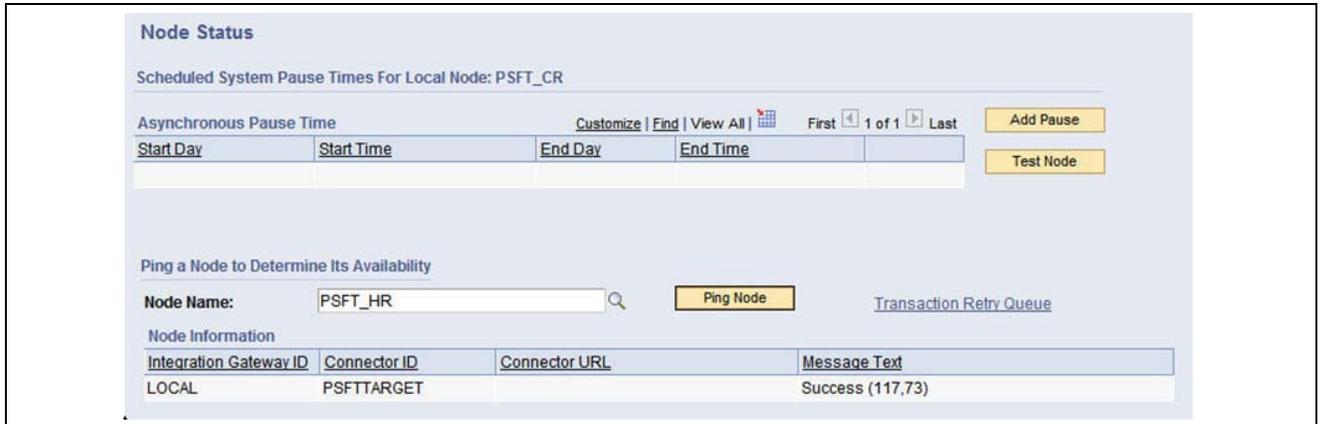
PeopleSoft Single Signon page

## 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, as shown in the following example:



Node Status page - 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 14-2-2: 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 14-2-3: 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 the mailboxes, as shown in the following example:

MAILBOX	Mailbox Type	Forwarding Address
10000	Normal	from@changeme.com
10001	Bounced	bounce@changeme.com
10002	Normal	reply@changeme.com

Mailbox Setup Search page

Mailbox	Mailbox Type	Forwarding Address
10000	Normal	from@changeme.com
10001	Bounced	bounce@changeme.com
10002	Normal	reply@changeme.com

## Task 14-2-4: Defining SETID for Inbound EIP Data

To define inbound data SETID:

1. Select Main Menu, Set Up CRM, Common Definitions, Customer, Customer Installation Options.

The Customer Data Management System Options page appears, as shown in the following example:

### 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

2. Enter *PSUSI* in the Default SetID for Inbound EIPs field, and then click Save.

## Task 14-2-5: Setting Up the FTP Server for the PeopleSoft SA 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 14-2-6: 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 14-2-7: 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 14-2-8: 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, Integration Definitions, 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 the Add/+ button) with the values listed in the following table:

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 Add/+ button ) with the values listed in the following table:

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 Add/+ button) with the values listed in the following table:

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.

---

1. For PeopleSoft SA 8.9/9.0, select Set Up SACR, Product Related, Recruiting and Admissions, Manage CRM Integration, Populate ID Control Table.
2. Enter a run control ID.
3. Enter the lower limit date for applicant data.
4. Enter the lower limit date for prospect data.
5. 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 Monitor, 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 14-2-9: 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 14-2-10: 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!** This step is *optional*; however, if you run this step, run it 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 14-2-11: 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 15

## Installing BPEL and Deploying BPEL Processes

This chapter discusses:

- Understanding PeopleSoft BPEL Integration
- Installing the Oracle BPEL Process Manager
- Configuring 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 PeopleSoft Integration Broker and the Oracle Business Process Execution Language (BPEL) Process Manager technologies for PeopleSoft Enterprise CRM 9.1 applications.

Perform the tasks in this chapter after you successfully install PeopleSoft PeopleTools, as described in the PeopleSoft Enterprise PeopleTools 8.50 installation guide for your database platform.

See *Installing PeopleSoft CRM 9.1 Applications*.

See *PeopleSoft Enterprise PeopleTools 8.50 Installation guide (for your database platform)*.

See *PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks*.

---

**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

BPEL is widely used by PeopleSoft Order Capture (OC), PeopleSoft Sales, and PeopleSoft Financial Services Industries (FSI). Call Center is BPEL enabled, but none of the Call Center functionality is dependant on BPEL in PeopleSoft CRM 9.1.

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 PeopleSoft/BPEL integration.

---

You can obtain the Oracle BPEL Process Manager from two different sources:

- The JDeveloper Install (10.1.3.3.1).

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 (10.1.3.3.1).

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 PeopleSoft Pure Internet Architecture do not impact the performance of service operation fulfillment). However, for a simple environment, it is possible to have PeopleSoft Integration Broker application services share PeopleSoft Pure Internet Architecture application servers.

---

## Task 15-1: Installing the Oracle BPEL Process Manager

This section discusses:

- Selecting and Installing the Software
- Applying Patches

### Task 15-1-1: Selecting and Installing the Software

The Oracle BPEL Process Manager is found as part of two different products:

- The JDeveloper Installation (10.1.3.3.1).
- The Oracle Middle-Tier OAS Installation (10.1.3.3.1).

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 Oracle's Technology Network (OTN).

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 8.50 Installation for <your database platform>*

*PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker*

*Oracle JDeveloper Install Guide*

## Task 15-1-2: Applying Patches

The Oracle Middle-Tier OAS installation (10.1.3.3.1) and JDeveloper installation (10.1.3.3.1) provide the core functionality necessary to integrate BPEL with the PeopleSoft system, however; you must also install these additional patches:

- Cumulative Patchset OAS 10.1.3.3.0 (6148874)
- Cumulative Patchset OAS 10.1.3.3.1 (7301999)

BPEL integration patches, whether they are specific to the BPEL Process Manager or PeopleSoft BPEL integration, are available on My Oracle Support.

See My Oracle Support

Apply these patches before you activate any BPEL processes using the PeopleSoft BPEL integration. Oracle recommends that you apply *all* available patches before you deploy the PeopleSoft BPEL processes.

---

## Task 15-2: Configuring the Oracle BPEL Process Manager

This section discusses:

- Understanding the Oracle BPEL Configuration
- Adjusting the JTA Transaction Timeout
- Tuning the Sun Java Virtual Machine and Setting Proxy Values
- Timeout Setting Adjustments
- Changing ORABPEL Schema for PeopleSoft Worklist
- Verifying Required Message Container Definitions

### Understanding the Oracle BPEL Configuration

This task primarily involves the Oracle BPEL Process Manager, found as part of the Oracle Middle-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 15-2-1: 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 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 15-2-2: Tuning the Sun Java Virtual Machine and Setting Proxy Values

Heap size controls how much memory the Sun Java Virtual Machine (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. Oracle recommends 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 the following steps:

1. From Start menu, go to the Oracle Application Server menu and click Oracle Application Server Control. Login to the OC4J Instance homepage and 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 on the Command Line Options page, as shown in the following example:

**Command Line Options**

**Start-parameters: Java Options**

Server VM       Enable J2SE 5.0 Platform MBeans   
Only applicable to Java HotSpot VM

Verbose       Verbose:gc

Maximum heap size       Initial heap size

Options	Delete
-Xrs	
-XX:MaxPermSize=1228M	
-XX:AppendRatio=3	
-Djava.security.policy=\$ORACLE_HOME/j2ee/home/config/java2.policy	
-Djava.awt.headless=true	
-Dhttp.webdir.enable=false	
-Doraesb.home=D:\OAS_1013\integration\esb	
-Dhttp.proxySet=true	
-Doc4j.userThreads=true	
-Doracle.mdb.fastUndeploy=60	
-Dorabpel.home=D:\OAS_1013\bpel	
-Xbootclasspath*/p:D:\OAS_1013\bpel/lib/orabpel-boot.jar	
-Dhttp.proxyHost=www.your.proxy.server.here.com	
-Dhttp.proxyPort=your.proxy.port	
-Dhttp.nonProxyHosts=localhost 127.0.0.1 Your.Proxies.Here	
<input type="button" value="Add Another Row"/>	

Command Line Options page

- Proxy server settings, if any, should be entered on this page as shown.
- Click the Apply button to apply these changes.
- Start the OC4J instance.
- Additional Proxy setting updates should be made to the following file:

Edit <Oracle\_home>\bpel\bin\obsetenv.bat:

```
set PROXY_SET="true"
@REM Where has the JDK (supporting 1.4.1 or higher) been installed on
@REM this machine?
set JAVA_HOME=C:\product\10.1.3.1\OracleAS_1\jdk
if %PROXY_SET% == "true" goto set_proxy
set OB_JAVA_PROPERTIES=
set OB_JAVA_PROPERTIES=
goto end_set_proxy

:set_proxy
set OB_JAVA_PROPERTIES="-Dhttp.proxySet=true" "-Dhttp.proxyHost=www-
```

```
proxy.us.oracle.com" "-Dhttp.proxyPort=80" "-
Dhttp.nonProxyHosts=localhost|127.0.0.1|rtas145|rtas145.dsi-inet.peoplesoft.com
inet.peoplesoft.com|*.peoplesoft.com|*.us.oracle.com|*.oracle.com"
:end_set_proxy      enter the proxy values for your server
```

Use the Application Server Control - Multiple VM Configuration page to set Java heap size for an OC4J instance, as shown in the following example:

### Multiple VM Configuration

---

#### Islands

	Island ID	Number of Processes
<input checked="" type="radio"/>	default_island	2
<input type="radio"/>	tester	2

#### Related Links

[Virtual Machine Metrics](#)

---

#### Ports

RMI Ports	<input type="text" value="3101-3200"/>
JMS Ports	<input type="text" value="3201-3300"/>
AJP Ports	<input type="text" value="3001-3100"/>

---

#### Command Line Options

Java Executable	<input type="text"/>
OC4J Options	<input type="text" value="-properties"/>
Java Options	<input type="text" value="-Xms128m -Xmx128m"/>

---

#### Configuration File Paths

RMI Configuration File	<input type="text" value="/rmi.xml"/>
JMS Configuration File	<input type="text" value="/jms.xml"/>

Application Server Control - Multiple VM Configuration page

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.*

---

**Note.** If your Oracle Application Server (OAS) installation is being performed on a server running Microsoft Windows 2000, you must update the following line in the *obant.bat* file that is located at *[bpel home]/bpel/.bin/obant.ba*

Update line from: `set ANT_ARGS=-Dhome="%OB_HOME%" -Dbpel.home="%OB_HOME%" -Dant-orabpel.dir="%OB_HOME%\utilities -Dplatform="%OB_PLATFORM%" -Dapps="%J2EE_APPLICATIONS%"`

Update line to:

---

`set ANT_ARGS=-Dhome="%BPEL_HOME%" -Dbpel.home="%BPEL_HOME%" -Dant-orabpel.dir="`

---

### Task 15-2-3: Timeout Setting Adjustments

To further guard against timeouts and rollbacks during large service processing, time-out adjustment should be made here:

<ORACLE\_HOME>\j2ee\oc4j\_soa\config\transaction-manager.xml

- <ORACLE\_HOME>\j2ee\oc4j\_soa\config\transaction-manager.xml
- ```
<transaction-manager
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:noNamespaceSchemaLocation="http://xmlns.oracle.com/oracleas/schema⇒
/transaction-manager-10_0.xsd"
  transaction-timeout="30000" Update to 30000
  max-concurrent-transactions="-1"
```

### Task 15-2-4: Changing ORABPEL Schema for PeopleSoft Worklist

To support the PeopleSoft BPEL Worklist integration:

1. Increase the size of the PROPERTIES column in the DLV\_MESSAGE table (found in the ORABPEL schema).

The default column width is 1000 characters.

2. 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)
```

The column width of 2000 characters is only a starting point.

---

**Note.** 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 15-2-5: Verifying Required Message Container Definitions

This section discusses:

- Verifying the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE Message Parts

- Adding the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE Message Parts

**Important!** If you are installing or upgrading PeopleSoft PeopleTools, you must verify that the required message container definitions are present. Follow the instructions in the step *Verifying the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE Message Parts*.

## Verifying the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE Message Parts

To verify that the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE message parts are present, do the following:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages. Verify that the message response PT\_WL\_CREATE\_RESPONSE\_CONT.V1 is present and appears as shown in the following example:

**Message Definition** | Schema

**Status:** Message cannot be changed. Message belongs to a restricted service.

**Message:** PT\_WL\_CREATE\_RESPONSE | **Schema Exists:** Yes

**Version:** v1 |  Part Message

**Alias:** CreateWorklistEntryResponse

**Description:**

**Owner ID:** PeopleTools

**Comments:**

**Message Type:**  Rowset-based,  Nonrowset-based,  Container

**Service Operation References:**

**Parts:**

| 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               |

Buttons: Save, Save As, Return to Search, Message Definition | Schema

Message response PT\_WL\_CREATE\_RESPONSE\_CONT.V1

2. Verify that the message request PT\_WL\_CREATE\_REQUEST\_CONT.V1 is present and appears as shown in the following example:

**Message Definition** Schema

**Status:** Message cannot be changed. Message belongs to a restricted service.

**Message:** PT\_WL\_CREATE\_REQUEST\_CONT **Schema Exists:** Yes

**Version:** v1  Part Message

**Alias:** CreateWorklistEntryRequest

**Description:** Create worklist item Request

**Owner ID:** PeopleTools

**Comments:**

**Message Type**

Rowset-based

Nonrowset-based

Container

[Service Operation References](#)

**Add Parts** **Container Attributes**

| Message Name                         | Message Version | Sequence | Minimum Occurs | Maximum Occurs | *Unbound Maximum |
|--------------------------------------|-----------------|----------|----------------|----------------|------------------|
| <a href="#">PT_WL_CREATE_REQUEST</a> | v1              | 1        | 1              | 1              | N                |
| <a href="#">RBB_CREATE_WORKLIST</a>  | v1              | 2        | 1              | 1              | N                |

[Return to Search](#)

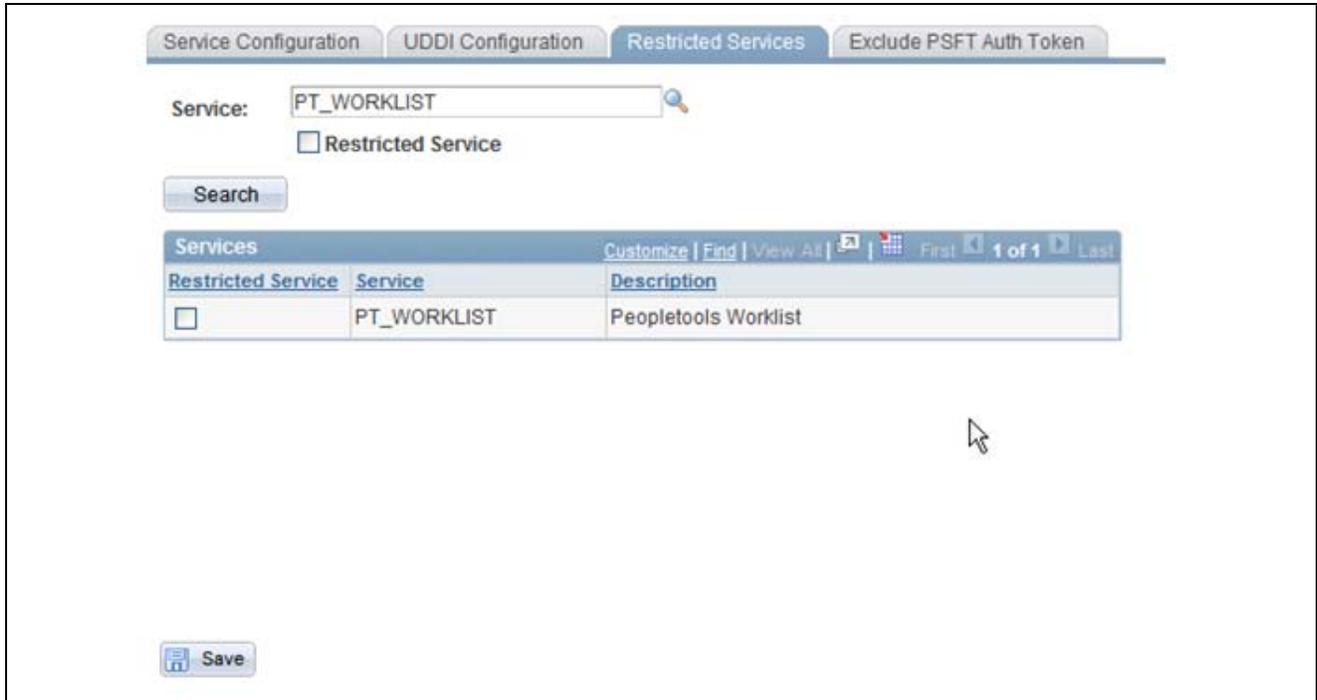
Message request PT\_WL\_CREATE\_REQUEST\_CONT.V1

**Important!** If the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE message parts are *not* present, then they must be added before the BPEL processes can properly deploy. Follow the instructions in the step *Adding the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE Message Parts*.

### Adding the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE Message Parts

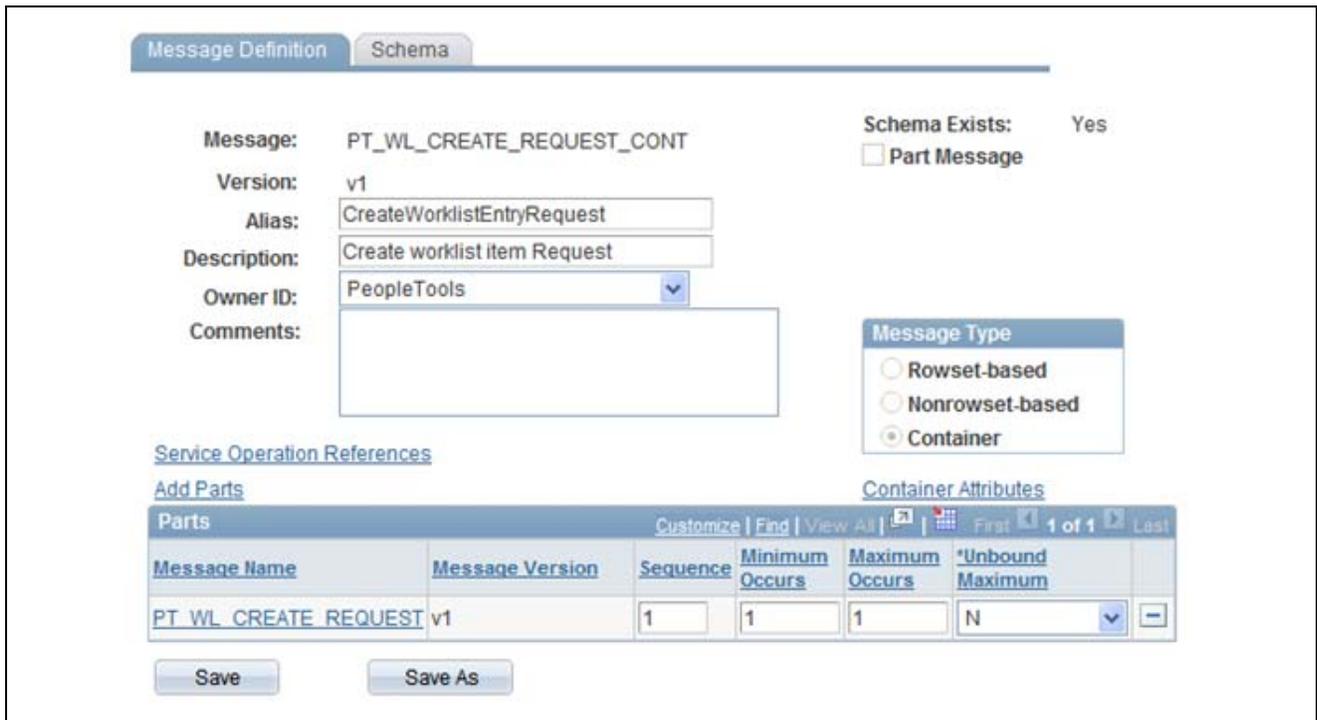
To add the RBB\_CREATE\_WORKLIST and RBB\_CREATE\_RESPONSE message parts, do the following:

1. Select PeopleTools, Integration Broker, Configuration, Service Configuration, and select the Restricted Services tab.



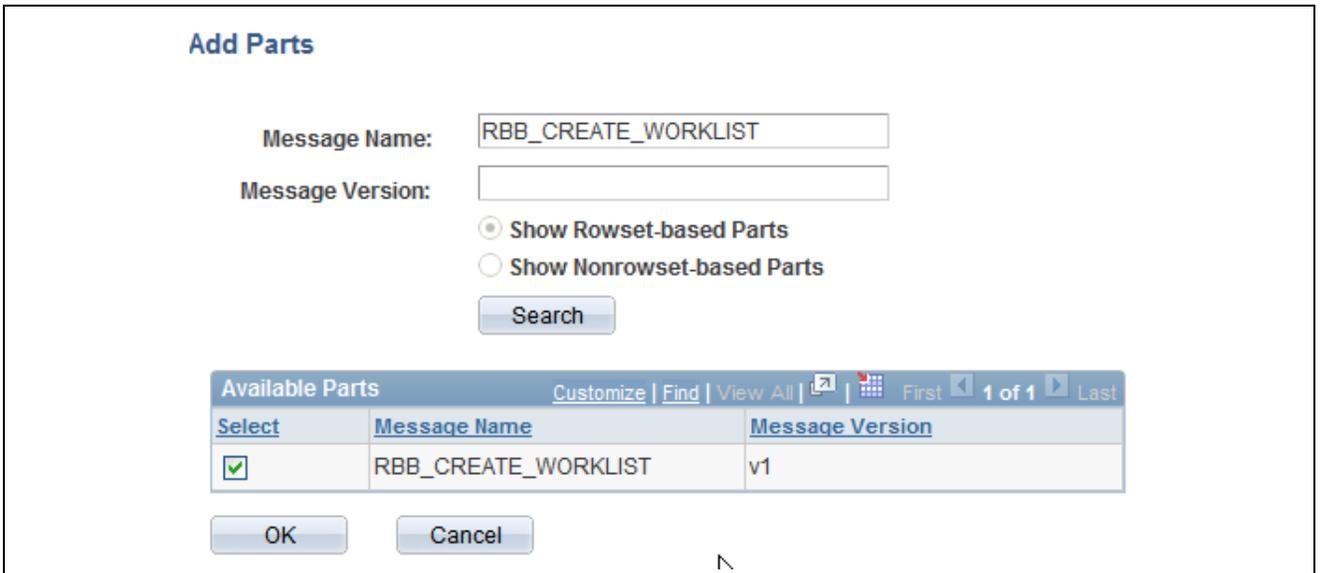
Integration Broker - Service Configuration: Restricted Services tab

2. On the Restricted Services tab, search for the PT\_WORKLIST service, and then clear (deselect) the Restricted Service check box.
3. Click Save.
4. Select PeopleTools, Integration Broker, Integration Setup, Messages, and open the message PT\_WL\_CREATE\_REQUEST\_CONT.V1.



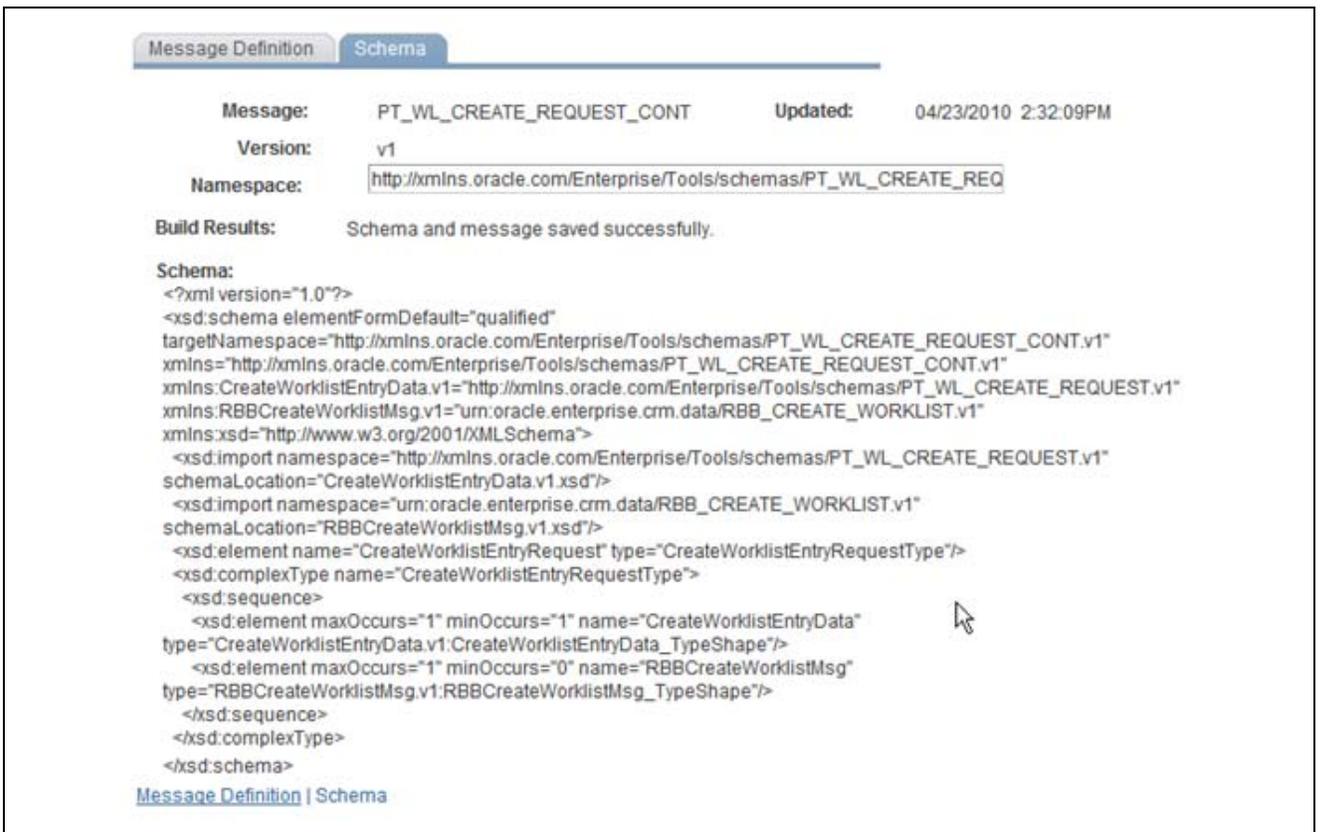
Integration Broker - Integration Setup: Message Definition

- Click the Add Parts link and select RBB\_CREATE\_WORKLIST.



Integration Setup: Message Definition - Add Parts

- Click OK and then click Save to save the message definition.
- Select the Schema tab and ensure that RBB\_CREATE\_WORKLIST now appears in the schema.



Integration Broker - Integration Setup: Schema

- Select PeopleTools, Integration Broker, Integration Setup, Messages, and open the message PT\_WL\_CREATE\_RESPONSE\_CONT.V1.

9. Click the Add Parts link and select RBB\_OUTCOME\_RESPONSE.
10. Click OK and then click Save to save the message definition.
11. Select the Schema tab and ensure that RBB\_OUTCOME\_RESPONSE now appears in the schema.

---

## Task 15-3: Restarting the Instance

Reboot the machine or restart the middle-tier instance for all configuration settings to take effect. You can refer to the OracleMiddle-Tier OAS documentation for details 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:

1. Select Start/Programs/<your installation name given at install time>/Oracle BPEL Process Manager 10.1.3.3.1/Stop BPEL PM Server.  
The BPEL PM Server is waiting for the Oracle BPEL Process Manager to shutdown.
2. Then select Start/Programs/<your installation name given at install time>/Oracle BPEL Process Manager 10.1.3.3.1/Start BPEL PM Server.

Ensure that your BPEL Process Manager completes initialization before you begin the steps that follow.

---

## Task 15-4: Recording Access Information

Note the host and port information that is 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 15-5: Creating and Configuring a BPEL Domain

This section discusses:

- Understanding BPEL Domain Configuration
- Creating a New BPEL Domain
- Setting the Domain auditLevel

## Understanding BPEL Domain Configuration

This task 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.

---

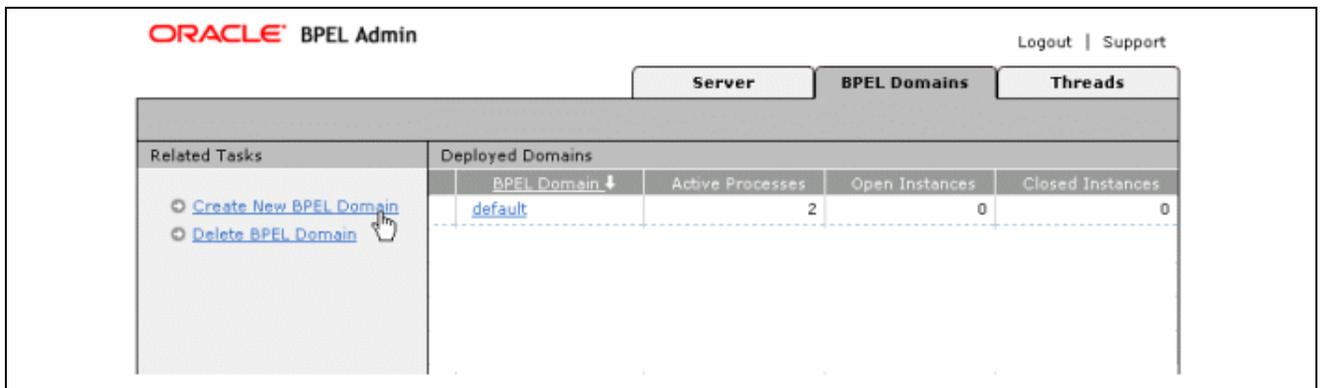
**Note.** The BPEL Process Manager must be available to perform the following steps. You must start the BPEL Process Manager before you create the BPEL domain and remain available throughout the BPEL deployment process.

---

### Task 15-5-1: Creating a New BPEL Domain

Through the BPEL Administrator console (<http://yourhostname:port/BPELAdmin>), perform the following steps:

1. Select the BPEL Domains tab, and then click the Create New BPEL Domain link, as shown in the following example:



BPEL Admin - BPEL Domains page

2. 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).
3. Use the default values populated in the other fields on the Create New BPEL Domain form.
4. Click the Create button.
5. When 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 15-5-2: 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 change the configuration property default value:

1. Log into the domain through the BPEL Console (<http://yourhostname:port/BPELConsole>).
2. Click the Manage BPEL Domain link (top of the page).

The Oracle BPEL Console page appears.

3. On the Configuration tab, change the auditLevel property to *production*, as shown in the following example:

The screenshot shows the Oracle BPEL Console interface. At the top, there are navigation links: "Manage BPEL Domain", "Logout", "Support", and "Jump To" (with a dropdown menu showing "default"). Below these are tabs for "Dashboard", "BPEL Processes", "Instances", and "Activities". The "BPEL Processes" tab is active, and the "Configuration" sub-tab is selected. The page displays the following information:

- BPEL Domain: default
- Statistics: [2 Active Processes](#) | [0 Retired Processes](#)
- Build version: 10.1.2.0.2 [build #2196] - type: release

The "Configuration" section is titled "Configuration Descriptor of this BPEL Domain" and contains a table with the following columns: Property, Name, Value, and Comment.

| Property             | Name                                  | Value      | Comment                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------|---------------------------------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| auditDetailThreshold | Audit trail details logging threshold | 50000      | The maximum size (in KiloBytes) an audit trail details string can be before it is stored separately from the audit trail. If a details string is larger than the threshold it will not be immediately loaded when the audit trail is initially retrieved; a link will be displayed with the size of the details string.<br><br>Typically, the details string will contain the contents of a BPEL variable. In cases where the variable is very large performance may be severely impacted by logging it to the audit trail.<br><br>The default value is 50 kilobytes. |
| auditLevel           | Audit trail logging level             | production | Controls the amount of audit events logged by a process; currently supported logging levels are: <ul style="list-style-type: none"> <li>• <b>off</b> - absolutely no logging performed whatsoever; may result in a slight performance boost for processing instances.</li> <li>• <b>minimal</b> - all events are logged; however, no audit details are logged.</li> <li>• <b>production</b> - all events are logged. The audit details for <i>assign</i> activities are not logged; the details for all other nodes are logged.</li> </ul>                            |

BPEL Console - Configuration page

4. Update the syncMaxWaitTime setting from 45 to 240 to avoid timeout issues.
5. Click Apply to activate the settings.

## Task 15-6: Configuring PeopleSoft for BPEL Integration

This section discusses:

- Understanding PeopleSoft BPEL Configuration
- Configuring a Special PeopleSoft Environment
- Configuring the PeopleSoft Integration Broker Gateway
- Confirming PeopleSoft Integration Broker Access
- Configuring Enterprise Service Settings

- 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 PeopleSoft Integration Broker Access

## Understanding PeopleSoft BPEL Configuration

Oracle recommends 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 PeopleSoft Pure Internet Architecture.

---

**Note.** The remainder of the installation steps require that the PeopleSoft Pure Internet Architecture environment is available. Administrators must be able to log into the environment to configure PeopleSoft Integration Broker. Also, the deployment process performed on the BPEL Process Manager requires access to PeopleSoft service details that are accessed through PeopleSoft Integration Broker. Ensure that the PeopleSoft environment is completely available throughout the remainder of the installation.

---

### Task 15-6-1: Configuring a Special PeopleSoft Environment

In this task, you can configure a special web and application server environment to provide PeopleSoft services.

---

**Note.** Skip this step if the existing PeopleSoft environment being used by PeopleSoft Pure Internet Architecture users will be used by service operations.

---

#### See Also

*PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker.*

### Task 15-6-2: Configuring the PeopleSoft 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 that is associated with the URL (used for Service Operations).

To configure the default application server:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Perform one of the following:
  - If you are creating a special application server for service operations, create a new gateway with the hostname/port URL that you configured as part of the previous task.
  - If you are using a single application server environment, confirm the local gateway URL for the proper configuration.

- Go to the Gateway Setup Properties (follow the instructions on the login page), and then configure the default application server for the application server that you are using, as shown in the examples that follow:

Gateways page

PeopleSoft Node Configuration page

Refer to the PeopleSoft Integration Broker PeopleBook for instructions on how to configure the Integration Broker to set up a gateway.

### Task 15-6-3: Confirming PeopleSoft Integration Broker Access

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 PeopleSoft Integration Gateway with an output stating the status is Active in the browser, the PeopleSoft Integration Broker is available for further configuration, as shown in the following example:

PeopleSoft Integration Gateway - Active 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 15-6-4: Configuring Enterprise Service Settings

To change the default service configurations:

- Select PeopleTools, Integration Broker, Configuration, Service Configuration.  
The Service Configuration page appears.
- On the Service Configuration page, change the following fields:

- a. In the Service Namespace field, enter *urn:oracle.enterprise.crm.servic..*
- b. In the Schema Namespace field, enter *urn:oracle.enterprise.crm.data.*
- c. In the Target Location field, enter *http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector.*

The following shows an example of the Service Configuration page:

The screenshot shows a web interface with three tabs: "Service Configuration", "UDDI Configuration", and "Restricted Services". The "Service Configuration" tab is active. It contains three input fields:

- \*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 15-6-5: Configuring the BPEL Node

The PeopleSoft Integration Broker node, BPEL, communicates to the BPEL engine. You must properly configure this node to point to the BPEL Process Manager as follows:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes and open the BPEL node.
  - The BPEL Nodes page appears.
2. Click the Properties link.
  - The Node Properties page appears.
3. Enter the information as shown in the following example of the Node Properties page:

The screenshot shows the "Node Properties" dialog box for the "BPEL" node. It features a table with the following data:

| *Name | Type     | *Property Name | Value                            | Comment |
|-------|----------|----------------|----------------------------------|---------|
| 1     | Category | BPELCONSOL     | http://myBPELPM:9700/BPELConsole |         |
| 2     | Category | BPELDOMAIN     | CRMDOMAIN                        |         |
| 3     | Category | BPELDOMAINI    | bpel                             |         |

At the bottom of the dialog are "OK" and "Cancel" buttons.

Node Properties page

- a. BPEL Console URL (used earlier to configure the domain)
- b. BPEL Domain (target deployment domain)
- c. BPEL Domain Password

## Task 15-6-6: 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:

1. Select Set Up CRM, Common Definitions, Business Process, Infrastructure, Update End Point Addresses. The Update End Points page appears.
2. Review the BPEL Process Manager hostname and port information in the Base URL, as well as the BPEL domain value in the Domain field.
3. On the Update End Points page, enter *BPEL* in the Node field and click Continue, as shown in the following example:

Update End Points page

**Note.** If you make a mistake or your environment changes, you can update all service routings associated with the BPEL node by selecting the Replace All check box *prior* to clicking Continue. This updates all message routings, regardless of whether these message routings are tokenized.

## Task 15-6-7: Configuring the PeopleSoft Worklist Web Service

You must include the PeopleSoft CRM part messages in the PeopleSoft Worklist web service operation message containers. This enables PeopleSoft Worklist web service to pass BPEL process-specific parameters, when creating a new PeopleSoft Worklist in the PeopleSoft application, and send a PeopleSoft Worklist outcome response back to the BPEL process that created the PeopleSoft Worklist.

The inclusion of these messages is a required configuration for a new installation. Including these messages is 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.

Include PeopleSoft CRM part messages in the PeopleSoft Worklist web service operation message container as follows:

1. Remove the restriction on PT\_WORKLIST web service to enable updating of the data.  
PT\_WORKLIST web service is delivered restricted, preventing users from updating the configuration setting.

- a. To update the content, select PeopleTools, Integration Broker, Configuration, Service Configuration. The Service Configuration page appears.
- b. Select the Restricted Services tab. On the Restricted Services page, enter *PT\_WORKLIST* then click Search.

The service PT\_Worklist displays in the Restricted Services search results, as shown in the following example:



Restricted Services page

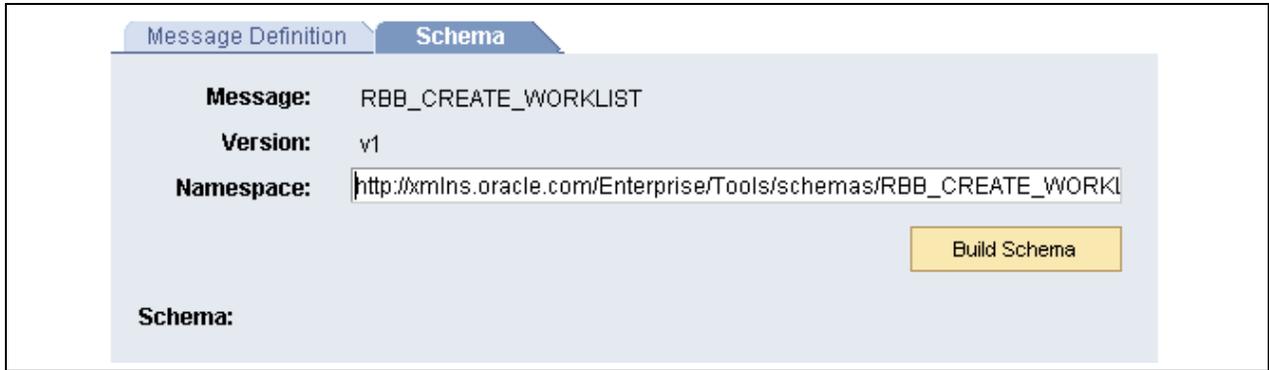
- c. Clear the Restricted Service check box for the PT\_WORKLIST web service, and save the page.
  - d. Return to the Service Configuration page and verify that the service system status is set to *Development*.
2. Add the RBB\_CREATE\_WORKLIST message part to the PT\_WL\_CREATE\_REQUEST\_CONT message 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. To generate the schema of the part message, select PeopleTools, Integration Broker, Integration Setup, Messages.
- b. Search for RBB\_CREATE\_WORKLIST.
- c. Go to the Schema page and click the Build Schema button.
- d. Confirm the namespace by clicking the OK button; the system generates the message schema.
- e. To add a part message to the container message, select PeopleTools, Integration Broker, Integration Setup, Messages.
- f. Search for the PT\_WL\_CREATE\_REQUEST\_CONT message container.
- g. Click the Add Parts link and select the *RBB\_CREATE\_WORKLIST* message and message version number.
- h. 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:

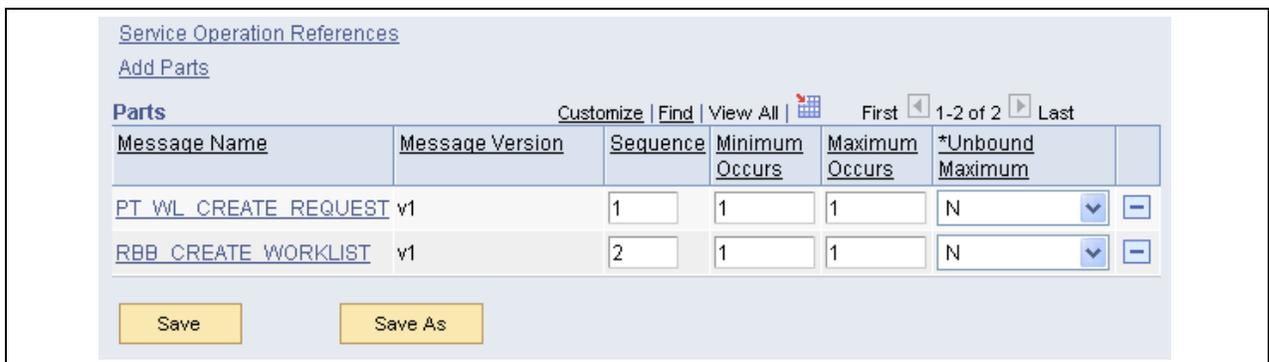


Schema page

This table provides the parameters on the Schema tab:

| Message             | Version | Namespace                                                            |
|---------------------|---------|----------------------------------------------------------------------|
| RBB_CREATE_WORKLIST | v1      | http://xmlns.oracle.com/Enterprise/Tools/schemas/RBB_CREATE_WROKLIST |

- i. Save the page to generate the schema of the reconfigured message container, as shown in the following example:



RBB\_CREATE\_WORKLIST part message in the PT\_WL\_CREATE\_REQUEST\_CONT container message

- 3. Register the CRM handler and 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:

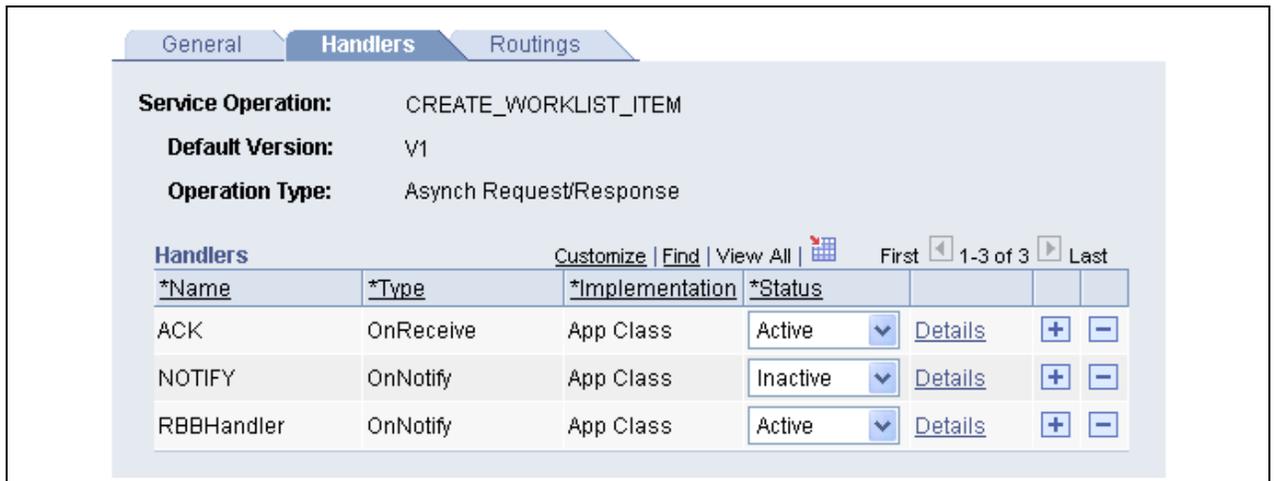
---

**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.

---

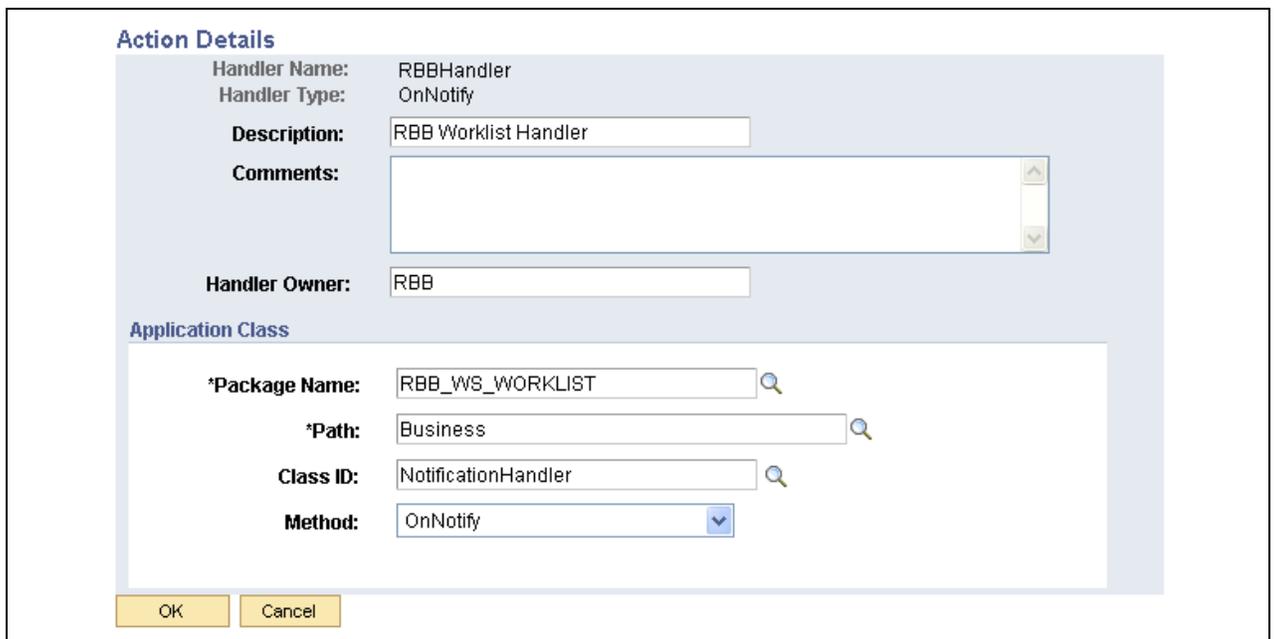
- a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for PT\_WORKLIST.
- b. Click the CREATE\_WORKLIST\_ITEM operation link to open the operation details.  
The Service Operation General page appears.
- c. Select the Handlers tab to access the Handlers page.
- d. Set the status of the PeopleSoft PeopleTools NOTIFY handler to *Inactive* and add the PeopleSoft CRM-specific handler, RBBHandler, with a status of *Active*. In the following example of the Handlers

page, note that the ACK handler is delivered by PeopleSoft PeopleTools and should maintain an *Active* status at all times:



Service Operations - Handlers page

- e. Click Save to save the page.
- f. Click the Details link in the RBBHandler row, enter the action detail parameters as shown in the following example:



Action Details page

- g. Click Save to save the 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. To generate the schema for the `RBB_OUTCOME_RESPONSE` part message, select PeopleTools, Integration Broker, Integration Setup, Messages, and then search for `RBB_OUTCOME_RESPONSE`, as shown in the following example:

Message Definition    Schema

**Message:** RBB\_OUTCOME\_RESPONSE      **Updated:** 06/19/2006 10:42:12AM

**Version:** v1

**Namespace:**

Schema page

- b. Select the Schema tab to access the Schema page, and then click the Build Schema button.
- c. Click the OK button to confirm the namespace; the system generates the message schema.
- d. Select PeopleTools, Integration Broker, Integration Setup, Messages and search for the `PT_WL_CREATE_RESPONSE_CONT` message container.
- e. Click the Add Parts link and select the `RBB_OUTCOME_RESPONSE` message.
- f. Designate a sequence number that is greater than the one assigned to the `PT_WL_CREATE_RESPONSE_CONT` message and enter the parameters shown in the following example:

[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 |                                  |
|---------------------------------------|-----------------|--------------------------------|--------------------------------|--------------------------------|------------------|----------------------------------|
| <a href="#">PT_WL_CREATE_RESPONSE</a> | v1              | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | N                | <input type="button" value="-"/> |
| <a href="#">RBB_OUTCOME_RESPONSE</a>  | v1              | <input type="text" value="2"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | N                | <input type="button" value="-"/> |

`RBB_OUTCOME_RESPONSE` part message in the `PT_WL_CREATE_RESPONSE_CONT` container message

- g. Save the page to regenerate the schema of the reconfigured message container.
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.

---

- a. Select PeopleTools, Integration Broker, Web Services, Provide Web Services.
- b. Enter `PT_WORKLIST` for the service name, click Search, and then click NEXT button.
- c. Select both `CREATE_WORKLIST_ITEM.v1` and `GETWLINSTANCE.v1` Service operations and click NEXT.
- d. Review the new WSDL as necessary; and click the NEXT button to publish the WSDL.
- e. Click the Finish button to publish the new WSDL into the PeopleSoft WSDL Repository, as shown in the following example:



Generate SOAP template

- f. Click the Generate SOAP Template button, to generate the SOAP template.
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 as follows:

    - a. Select PeopleTools, Integration Broker, Configuration.
 

The Configuration page appears.
    - b. Select the Restricted Services tab to access the Restricted Services page.
    - c. Select the Restricted Service check box, and then save the page.

## Task 15-6-8: 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 that we 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.  
The Service Operations - General page appears.
4. 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. Select the Handlers tab to access the Handler page.
6. Ensure that any handler listed is set to *Active* (with the exception of the CREATE\_WORKLIST\_ITEM service operation, covered in a previous task).
7. Select the Routings tab to access the Routings page.
8. Ensure that the listed routing has a status of *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 then click the Activate Selected Routings button.
9. Click Save.
10. For asynchronous service operations only, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status.  
The Queue Status page appears.
11. Ensure that the queue that the service operation uses is set to *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 Service Configuration - 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 9.1 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services."

## Confirming PeopleSoft PeopleTools Web Service

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 PeopleSoft Integration Broker Queues are in a *Running* state:

- IB\_CHNL
- IB\_GENERIC
- WORKLIST\_CHNL
- WSDL\_QUEUE

To verify whether a queue is running:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Queue Status.  
The Queue Status page appears.
2. Click the Find link in the Queues grid.
3. Enter the *Queue Name* in the Search Box and click the OK button.
4. 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.
5. Save your changes.

### 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 9.1 Application Fundamentals PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, “*Business Object Delivered Web Services*.”

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook*, “*Delivered Web Services and Service Operations*.”

See *PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook*, “Order Capture Delivered Business Processes and Web Services.”

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, “Delivered Business Processes and Web Services.”

See *PeopleSoft Enterprise Sales 9.1 PeopleBook*, “Sales Delivered Business Processes and Web Services.”

See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, “Delivered Web Services and Service Operations.”

See *PeopleSoft Enterprise Bill Presentment and Account Management 9.1 PeopleBook*, “Delivered Web Service and Service Operations.”

See *PeopleSoft Enterprise Policy and Claims Presentment 9.1 PeopleBook*, “Delivered Web Service and Service Operations.”

## Task 15-6-9: Configuring the PeopleSoft BPEL End User Monitor

This section involves the steps that enable the PeopleSoft BPEL End User Monitor, as well as some other minor features. These steps include configuring JNDI access to the BPEL Process Manager, as well as copying over BPEL supporting Java classes.

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.

To configure JNDI access and copy over the BPEL supporting Java classes:

1. Select Set Up CRM, Common Definitions, Business Process, Infrastructure, JNDI Details.

The JNDI Details page appears, as shown in the following example:

| *BPEL Node | *ORMI URL                              | *ORMI Port | *Username | *Password |
|------------|----------------------------------------|------------|-----------|-----------|
| BPEL       | ormi://myBPELPM.peoplesoft.com/orabpel | 23791      | admin     | *****     |

JNDI Details page

2. Configure the BPEL node JNDI access by entering the following information:

- In the BPEL Node field, enter *BPEL*.
- In the ORMI URL field, enter *ormi://<host>/orabpel*.

Note that no port information is specified as previously performed.

- In the ORMI Port field, enter *23791*, unless you have changed the ORMI port during the middle-tier installation.
- In the Username and Password fields, enter the JNDI username and password information (not the BPEL domain).

The defaults are *admin* and *welcome*, respectively.

3. Click Save to save your changes.
4. Copy the BPEL support files using the following table as a guide.

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.

This table lists filenames and directories to assist you in copying the required files from the BPEL Process Manager environment into the <PSHOME>/class directory:

| Filename                                                                                                                                              | Directory                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| bpm-infra.jar<br>bpm-services.jar<br>dms.jar<br>orabpel.jar<br>orabpel-boot.jar<br>orabpel-common.jar<br>orabpel-thirdparty.jar<br>xmlparserv2.jar ** | <BPEL_PM_HOME>/integration/orabpel/lib                                                                                                                             |
| activation.jar **<br>bcel.jar<br>ejb.jar<br>jaas.jar<br>javax77.jar<br>jms.jar<br>jmxri.jar<br>jta.jar<br>mail.jar **<br>servlet.jar                  | <BPEL_PM_HOME>/integration/orabpel/system<br>/appserver/oc4j/j2ee/home/lib (for jdeveloper)<br><br><i>or</i><br><BPEL_PM_HOME>/j2ee/home/lib (for middle-tier)     |
| oc4jclient.jar                                                                                                                                        | <BPEL_PM_HOME>/integration/orabpel/system<br>/appserver/oc4j/j2ee/home (for jdeveloper)<br><br><i>or</i><br><BPEL_PM_HOME>/j2ee/home (for middle-tier)             |
| ojdl.jar                                                                                                                                              | <BPEL_PM_HOME>/integration/orabpel/system<br>/appserver/oc4j/diagnostics/lib (for jdeveloper)<br><br><i>or</i><br><BPEL_PM_HOME>/diagnostics/lib (for middle-tier) |
| optic.jar                                                                                                                                             | <BPEL_PM_HOME>/integration/jdev/opmn/lib (for<br>jdeveloper may not be available)<br><br><i>or</i><br><BPEL_PM_HOME>/opmn/lib (for middle-tier)                    |

Two asterisks (\*\*) indicate 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 15-6-10: Restarting PeopleSoft Enterprise Environment

After the configuration changes complete, do the following:

1. Restart the PeopleSoft Enterprise environment for the settings to take effect.
2. Restart all facilities of the PeopleSoft environment.

For example, the application server, web server, and the PeopleSoft Process Scheduler.

The configuration on the PeopleSoft side is now complete.

## Task 15-6-11: Verifying PeopleSoft Integration Broker Access

After you restart the PeopleSoft environment, you can test access to a service's Web Service Definition Language (WSDL).

To test access and verify that the basic information required by the BPEL deployment tasks is available:

1. From a web browser on the BPEL Process Manager machine, enter the following URL address:  
`http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector/PT_WORKLIST.1.wsdl`
2. 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.
3. 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 15-7: Deploying PeopleSoft CRM BPEL Processes

This section discusses:

- Understanding PeopleSoft CRM BPEL Deployment
- Copying BPEL Process Files
- Configuring BPEL Process Files for Deployment
- Deploying All BPEL Processes

## Understanding PeopleSoft CRM BPEL Deployment

This section discusses the initial deployment of all PeopleSoft CRM BPEL processes onto the BPEL Process Manager.

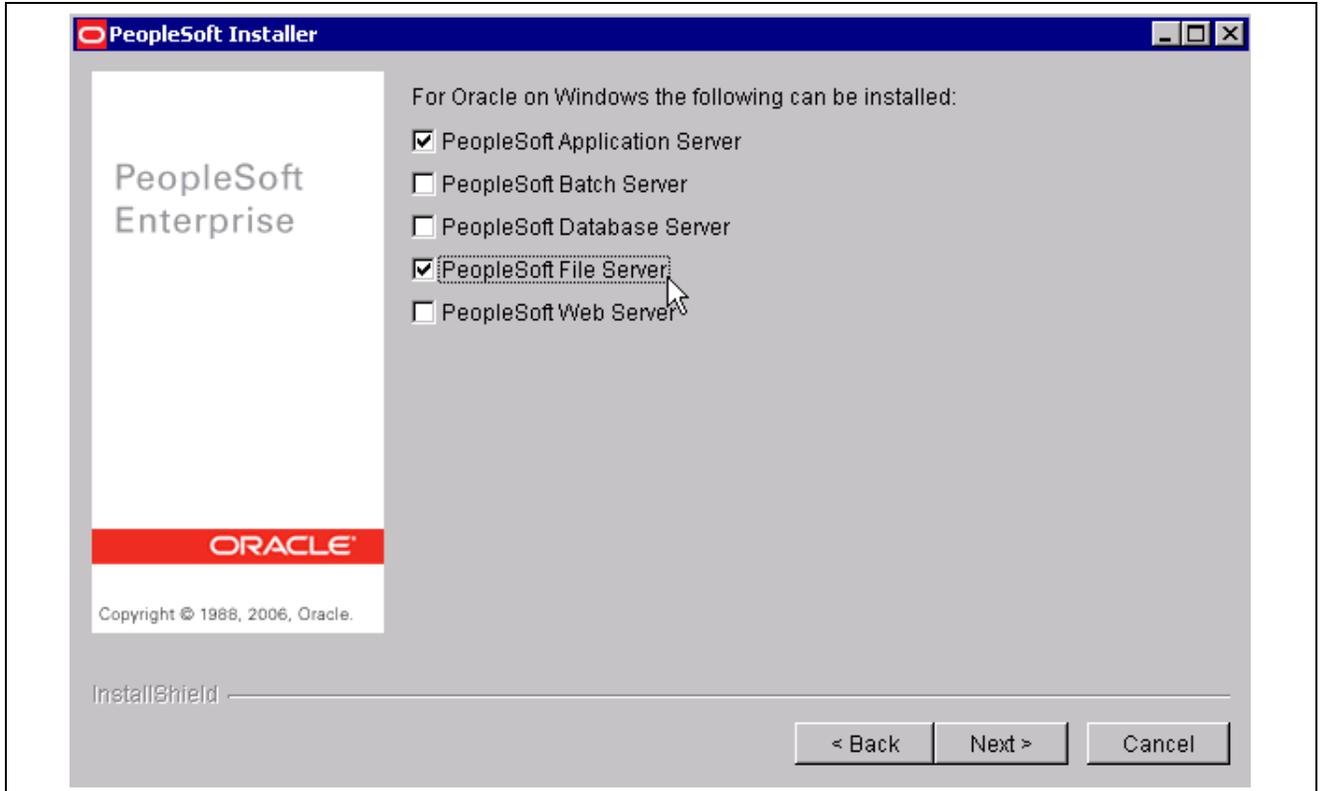
---

**Note.** You cannot complete this task until you complete all previous tasks and *both* the BPEL Process Manager and PeopleSoft Integration Broker are available.

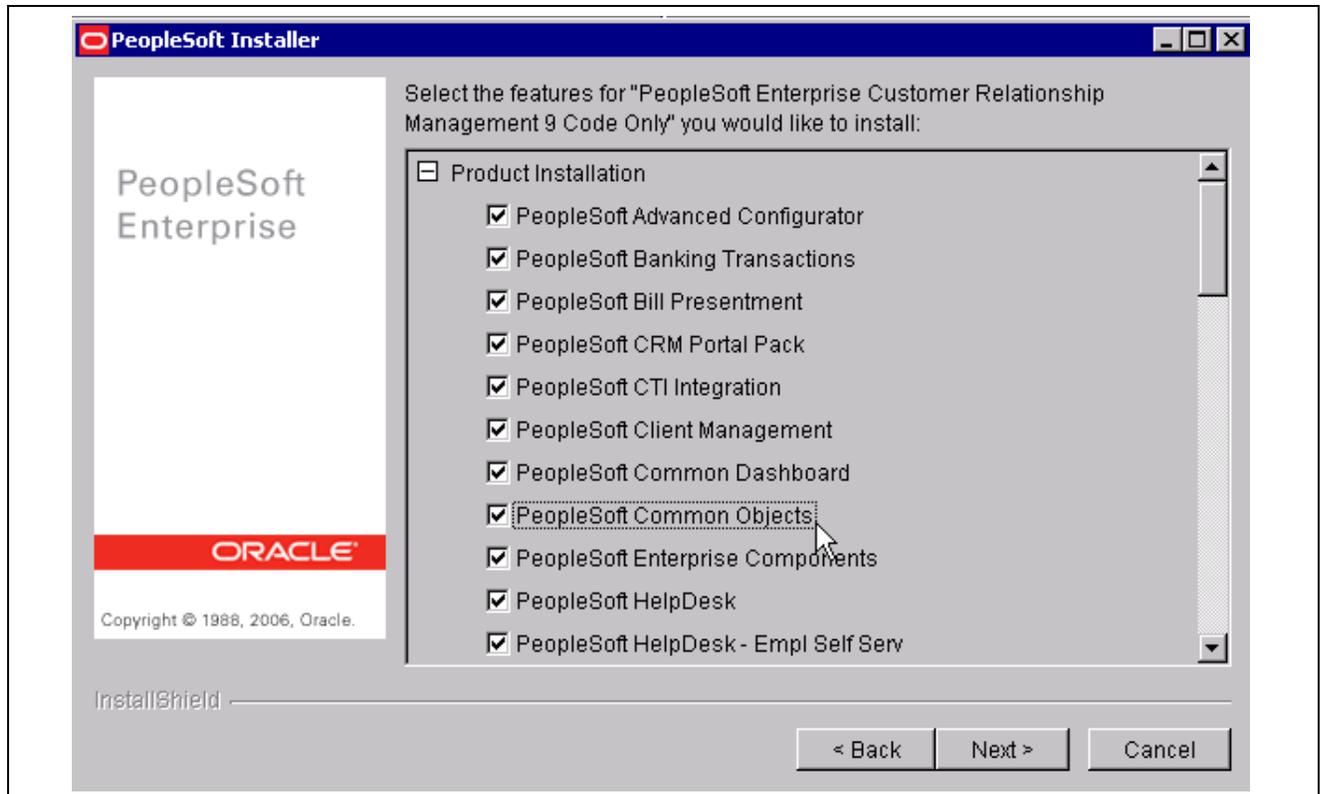
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## Task 15-7-1: Copying BPEL Process Files

In the PeopleSoft installation directory (PSHOME), there should be a directory called bpe1. The bpe1 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 as follows:

1. On your BPEL Process Manager machine, create a new directory in `<BPEL_PM_HOME>/bpel` named `peoplesoft`.
2. Copy the *contents* of the `<PSHOME>/bpel` directory over to the `<BPEL_PM_HOME>/bpel peoplesoft` directory on your target BPEL Process Manager machine.
3. After the copy is complete, the contents of the *peoplesoft directory* should be the same as the contents of the *bpel directory*.

The remainder of the tasks in this section are performed on the BPEL Process Manager machine.

## Task 15-7-2: Configuring BPEL Process Files for Deployment

### Editing `install.properties`

This task involves editing the `install.properties` file, located in `<BPEL_PM_HOME>/bpel/peoplesoft`. This file creates a set of deployable files for the environment that you created.

The delivered file appears as follows:

```
install.ps-host=<Integration Broker Host>
install.bpel-host=<your bpelmp machine>
install.bpel-port=<your bpelmp machine port>
install.bpel-domain=<your created BPEL Domain name>
```

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.

### Creating Deployable BPEL Files

This task creates a new folder structure to use for the actual BPEL deployment. These files have the correct end point addresses for your configured environment as entered in the `install.properties` file.

To create deployable BPEL files:

1. Open the Oracle BPEL Process Manager Developer Prompt.  
This special prompt window has many environmental properties already configured.  
Refer to your BPEL Process Manager documentation on how to start the Developer Prompt for your environment.
2. For a Microsoft environment, select Start, Programs, <your installation name given at install time>, Oracle BPEL Process Manager 10.1.3.3.1, Developer Prompt.

A command window appears.

3. In the Developer Prompt, change the directory to the `<BPEL_PM_HOME>/bpel/peoplesoft` directory.
4. 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 15-7-3: Deploying All BPEL Processes

In this final task, you deploy the BPEL processes onto the BPEL domain that you previously created.

To deploy the BPEL processes onto the BPEL domain:

1. Change the directory into the newly created `crm_<date-time>` directory.
2. 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 16

# Installing PeopleSoft Unified Agent Desktop

This chapter discusses:

- Understanding PeopleSoft Unified Agent Desktop
- Prerequisites
- Configuring the Oracle Proxy-Enabled Server
- Validating PeopleSoft MultiChannel Framework REN
- Configuring a User as a PeopleSoft UAD Voice Agent
- Configuring a User as a PeopleSoft UAD MCF Agent
- Configuring Agent Presence Codes
- Overriding Presence Text of System-Defined Entries (Optional)
- Configuring Action Buttons for PeopleSoft UAD
- Defining Task Category Codes
- Configuring Status Codes
- Enabling PeopleSoft UAD Pagelet for the Home Page (Optional)
- Enabling PeopleSoft CRM UAD

---

## 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.

---

**Note.** The PeopleSoft Universal Agent Desktop (UAD) requires MultiChannel Framework (MCF) and is not associated to any PeopleSoft Enterprise CRM Product (for example, PeopleSoft Call Center).

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**Note.** Oracle recommends that you consult the PeopleSoft Enterprise CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleSoft PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

---

## 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 8.50 PeopleBook: PeopleSoft MultiChannel Framework*, "Enabling MCF Features for CRM Applications."

---

## Task 16-1: Configuring the Oracle Proxy-Enabled 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 16-2: Validating PeopleSoft MultiChannel Framework REN

To receive and process tasks such as chats, emails and other generic business tasks, the user session must establish a valid connection to the PeopleSoft MultiChannel Framework (MCF) REN Server. Otherwise, the user is unable to send or receive PeopleSoft MCF tasks.

The connection validation consists of two tests:

- The Buffer Test.
- The Ping Test.

To validate connection to the PeopleSoft 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*.

- 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.

- With the 50,000 bytes correctly processed, the Buffer Test is passed and you can close the Buffer Test browser window.
- 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 your System Administrator.

- 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 8.50 PeopleBook: PeopleSoft MultiChannel Framework*, "Configuring REN Servers. "

---

## Task 16-3: 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 8.50 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, as listed in this table:

| 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 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 the trace level option:

1. Select PeopleTools, MultiChannel Framework, CTI Configure, 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, using the tables that follow:
    - 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)<br>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)<br>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 16-4: 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 8.50 PeopleBook: PeopleSoft MultiChannel Framework*, "Configuring MCF Agents"

With the new PeopleSoft UAD enabled, the current Trace Level option provides the following debugging capability, as listed in this table:

| 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 the trace level 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 voice calls and other MCF tasks.  
Refer to the 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 16-5: Configuring Agent Presence Codes

Presence Codes are the value of text strings that are predefined 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.

This table lists the delivered, system-defined default entries:

| 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.

---

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## Task 16-6: Overriding Presence Text of System-Defined Entries (Optional)

This task is 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 16-7: Configuring Action Buttons for PeopleSoft UAD

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 CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select a Display Option. The default is *Image*.

---

**Note.** Action buttons on the PeopleSoft UAD console can be rendered 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.

- 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 | Consultive Transfer | No       | CT    | PS_UAD_CONSULT_TRANSFER_ICN |
| 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 16-8: 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 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 16-9: 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 new CTI Status Codes:

1. Login to a PeopleSoft 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 CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select the Status Codes tab.

- 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.

- Click Save to save the new Multichannel Queue Status code.

This table lists the default CTI Status codes that 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  |

This table lists the default MultiChannel Queue Status codes that 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 |

| Order | Status Label | Event    | Image Name                |
|-------|--------------|----------|---------------------------|
| 5     | On Break     | On Break | PS_UAD_MC_UNAVAILABLE_ICN |
| 6     | Away         | Away     | PS_UAD_MC_UNAVAILABLE_ICN |

---

## Task 16-10: Enabling PeopleSoft UAD Pagelet for the Home Page (Optional)

This task is optional. The content on the 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 the 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.

---

## Task 16-11: Enabling PeopleSoft CRM UAD

This section discusses:

- Updating Branding
- Editing the PeopleSoft MultiChannel Toolbar
- Editing the PeopleSoft PeopleTools 8.50 Default Template
- Editing the PeopleSoft PeopleTools 8.50 Frames Template
- Editing the Hover Navigation iFrame Template

### Task 16-11-1: Updating Branding

To update branding:

1. Select PeopleTools, Utilities, Administration, PeopleTools Options to access the PeopleTools Options page, as shown in the following example:

**PeopleTools Options**

Environment Long Name:  Environment Short Name:

System Type:

**Language Settings**

Language Code: English \*Sort Order Option:

Translations Change Last Update

Background Disconnect Interval:  Temp Table Instances (Total):

Multi-Company Organization Temp Table Instances (Online):

Multi-Currency \*Maximum Message Size:

Use Business Unit in nVision Base Time Zone:

Use Secure Rep Rqst in nVision Last Help Context # Used:

Multiple Jobs Allowed \*Data Field Length Checking:

Allow DB Optimizer Trace \*Maximum Attachment Chunk Size:

Grant Access Upgrade Project Commit Limit:

Platform Compatibility Mode \*Enable Switch User:

Allow NT batch when CCSID<>37

Save Error is Fatal

Set Focus on Save Button

\*Case Insensitive Searching:  Max rows in search results:

Style Sheet Name:  Default rows in search results:

Branding Application Package:

Branding Application Class:

**Tree Manager Options**

Use Tree Update Reservation

Max Tree Inactivity Period,min:

**Help Options**

F1 Help URL:

PeopleSoft PeopleTools Options page

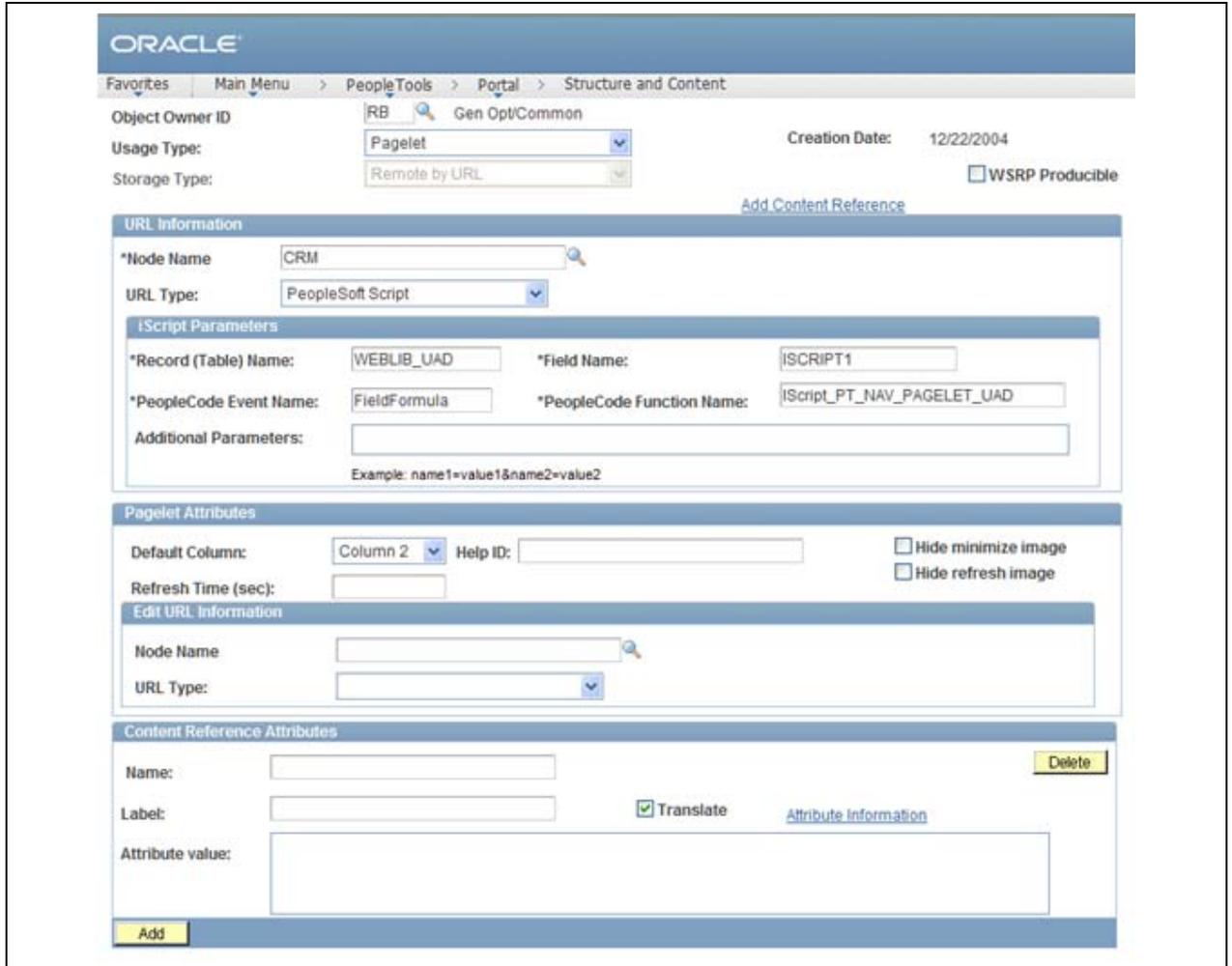
2. In the Branding Application Package field, enter *UAD\_BRANDING*.
3. Accept the default values for the remaining fields.

## Task 16-11-2: Editing the PeopleSoft MultiChannel Toolbar

To edit the PeopleSoft MultiChannel toolbar:

1. Select PeopleTools, Portal, Structure and Content.
2. Click the Portal Options link.
3. Click the Pagelet link.
4. In the Node Name field, select CRM from the drop-down list.
5. Edit the MultiChannel Toolbar as follows:

- a. In the Record (Table) Name field, enter *WEBLIB\_UAD*.
- b. In the PeopleSoft Function Name field, enter *IScript\_PT\_NAV\_PAGELET\_UAD*.
- c. Accept the default values for the remaining fields on the Structure and Content page, as shown in the following example:



Structure and Content page

### Task 16-11-3: Editing the PeopleSoft PeopleTools 8.50 Default Template

To edit the PeopleSoft PeopleTools 8.50 default template:

- 1. Select PeopleTools, Portal, Structure and Content.

The Content Ref Administration page appears, as shown in the following example:

**Content Ref Administration**

Author: PTDMO

Name: DEFAULT\_TEMPLATE

Parent Folder: Templates

\*Label: 8.50 default template [Copy object](#) [Select New Parent Folder](#)

Long Description: (254 Characters) 8.50 default template

Product: PT

\*Valid from date: 05/18/2000 [B3](#)

Sequence number:

Valid to date:  [B3](#)

Object Owner ID: PPT [PeopleTools](#)

Creation Date: 05/18/2000

Usage Type: Inline frame template

Storage Type: Remote by URL

[Add Content Reference](#)

**URL Information**

\*Node Name: LOCAL\_NODE [B3](#)

URL Type: PeopleSoft Script

**IScript Parameters**

\*Record (Table) Name: WEBLIB\_UAD\_NAV \*Field Name: ISCRIPT1

\*PeopleCode Event Name: FieldFormula \*PeopleCode Function Name: IScript\_PT\_NAV\_TPL\_FRAME

Additional Parameters:

Example: name1=value1&name2=value2

Producer:  [B3](#)

Portlet:  [B3](#)

[Producer Details](#)

**Content Reference Attributes**

Name:

Label:

Attribute value:

Translate [Attribute Information](#) [Delete](#)

Content Ref Administration page

2. Click the Portal Objects link.  
The Portal Objects page appears.
3. Click the Template link.
4. Click the Edit of 8.50 Default Template.  
The DEFAULT\_TEMPLATE page appears.
  - a. In the Record (Table) Name field, enter *WEBLIB\_UAD\_NAV*.
  - b. Accept the default values for the remaining fields.

## Task 16-11-4: Editing the PeopleSoft PeopleTools 8.50 Frames Template

To edit the PeopleSoft PeopleTools 8.50 frames template:

1. Select PeopleTools, Portal, Structure and Content.
2. Click the Portal Objects link.  
The Portal Options page appears.

3. Click the Template link.
4. Click the Edit of 8.50 frames template.

The PT\_85X\_FRAMES\_TEMPLATE page appears.

- a. In the Record (Table) Name field, enter *WEBLIB\_UAD\_NAV* (from *WEBLIB\_PT\_NAV*).
- b. Accept the default values for the remaining fields.

## **Task 16-11-5: Editing the Hover Navigation iFrame Template**

To edit the hover navigation iFrame template:

1. Select PeopleTools, Portal, Structure and Content.
2. Click the Portal Objects link.
3. Click the Template link.
4. Click the Edit of Hover nav iframe template.

The PT\_HOVERNAV\_TEMPLATE page appears.

- a. In the Record (Table) Name field, enter *WEBLIB\_UAD\_NAV*.
- b. Accept the default values for the remaining fields.



# APPENDIX A

## Reviewing PeopleSoft Tablespaces and Parameters

This appendix discusses:

- Understanding PeopleSoft OLM Tablespaces
- Resizing within PeopleSoft Customer Data Model
- Changing Parameter Values
- Reviewing Parameter Descriptions
- Reviewing the PeopleSoft OLM Component Port List

---

### Understanding PeopleSoft OLM Tablespaces

This table contains the PeopleSoft Online Marketing 9.1 tablespace names and a description of each tablespace.

| OLM 9.1 Tablespace Name | Tablespace Description                                                                                                                                                                                                                            |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RYAPP                   | General tablespace that stores most of the application-specific data.                                                                                                                                                                             |
| RYWORK                  | Tablespace for PeopleSoft 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 9.1 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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## Resizing within PeopleSoft Customer Data Model

In addition to the specific tablespaces that PeopleSoft OLM 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 PeopleSoft 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 PeopleSoft 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 PeopleSoft 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 PeopleSoft 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 A-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 (ERP). The syntax of the scripting language is covered in the Email Response Processors Documentation.

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## Task A-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.

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**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.

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This table describes the PeopleSoft OLM parameters and includes parameters for DES, Mailcaster, and All:

| 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.<br><br>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 OLM 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            | <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> .<br><br>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.<br><br>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. |
| 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: <i>defaultURLBase=&lt;URL of online dialog webserver&gt;</i>                                                                                                                                                                                                                                                                                                          |
| delayForDBCheck                    |                | Specifies the number of seconds DES waits before attempting a database connection, to prevent starting before the database is available.<br><br>This parameter applies only at database initialization. The default is <i>15 seconds</i> .                                                                                                                                                                                                                                    |
| directURLBase                      | DES            | Specifies the direct URL of the DES ( <i>http://&lt;hostname&gt;:port</i> )                                                                                                                                                                                                                                                                                                                                                                                                   |
| 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.                                                                                                                                                                                                                                                                                                                                                 |
| isDESMultiInstance             | DES            | Indicates that the DES has multiple instances.                                                                                                                                                                                                                                                                                                                         |
| 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                                                                                                                                                                                                                                                                                                                                                       |
|                                |                |                                                                                                                                                                                                                                                                                                                                                                        |
| jmsServiceLocator              | DES            | JMS Service Locator.                                                                                                                                                                                                                                                                                                                                                   |
| jmsTopicConnection             | DES            | JMS Topics Connection.                                                                                                                                                                                                                                                                                                                                                 |
| jmsUser                        | DES            | JMS User.                                                                                                                                                                                                                                                                                                                                                              |
| jmsUserPassword                | DES            | JMS User Password.                                                                                                                                                                                                                                                                                                                                                     |
| jdbcDriver                     | DES/Mailcaster | This is the JDBC driver that the PeopleSoft OLM components use to access the database. Default values are: <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.<br><br>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.                                                                                                                                                                                                                                 |
| OMKDESSecurityService           | DES        | JMS Security Service.                                                                                                                                                                                                                                                                                                                                                                        |
| 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:<br><br><code>preloadCampaign=Dialog1,dialog 2,Dialog33 for Staging</code><br><br>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.<br><br>For failover, you can use a comma-separated list. For example: //mymachine1:9000,//machine2:9050<br><br>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:<br><br>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 <sup>63</sup> 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.<br><br>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).<br><br>If set to <i>True</i> , the Mailcaster will only process small jobs.<br><br>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>• mail1.pscrm.com<br/>Uses one mail server on mail1.pscrm.com</li> <li>• mail1.pscrm.com;mail2.pscrm.com<br/>Uses two mail servers, one on mail1.pscrm.com and the other on mail2.pscrm.com</li> <li>• mail1.pscrm.com:1025;mail2.pscrm.com:1025<br/>Uses two mail servers on port 1025, one on mail1.pscrm.com and the other on mail2.pscrm.com</li> <li>• mail1.pscrm.com:threads=5<br/>Uses five connections to mail1.pscrm.com.</li> <li>• mail1.pscrm.com:25:threads=5;mail2.pscrm.com:25:threads=3<br/>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.                |

This table describes the PeopleSoft OLM parameters and includes parameters for Watchdog:

| 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 PeopleSoft 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.                                                                                                                                                       |

| Parameter Value              | Components | Description                                                                                                                                                                                                           |
|------------------------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.                                                                                                          |
| 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 <i>5</i> .                                                                                                                 |
| 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. |

| Parameter Value        | Components | Description                                                                                                                                                                                                                                                                        |
|------------------------|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| maxMemorySize          | Watchdog   | Specifies the maximum memory setting for the DES server (that is, the <code>-Mx</code> 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). |
| 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 <code>interval=30</code> , then this needs to be 30, 60, 90, and so on.                                                                               |
| memoryAlertPercentage  | Watchdog   | The percentage of max memory used before sending a warning. For example, if set to “50” and the <code>maxMemorySize</code> 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 parameters for the ping command for this Watchdog system (default value is empty). To set Watchdog to test using “/usr/bin/ping machine_name-a”, make the following settings:<br><br>pingCommandPreHostto '/usr/bin/ping' and<br>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> .<br><br>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.<br><br>On Win/NT, this should be “-w” to make the used ping command “ping -w 30 hostname”.<br><br>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> .                                                                                                                                         |

| Parameter Value              | Components | Description                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| pingWait                     | Watchdog   | Specifies the number of milliseconds between consecutive ping commands. The default is <i>15000 milliseconds</i> .                                                                                                                                                                                                                                                                                                           |
| qkLookPort                   | Watchdog   | Specifies the port number that Watchdog will use for the quick status report. The default is <i>6700</i> .<br><br>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. The value is <i>True</i> or <i>False</i> . Default values is <i>False</i> .                                                                                                                                                                                                                                                                                     |
| rmiPort                      | Watchdog   | Specifies the port to use for RMI connections to the mailcasters. The default is <i>1099</i> .                                                                                                                                                                                                                                                                                                                               |
| 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.                                                                                                                                                                                                                                                                                       |

| Parameter Value           | Components | Description                                                                                                                                                                                                                                                                                                                                            |
|---------------------------|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| runningEventMinusMinutes  | Watchdog   | Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.                                                                                                                                                                                                                 |
| sentOverQueuedRatio       | Watchdog   | Checks for the number of mails sent compared with the mails queued. This is used like "SentMessages < sentOverQueuedRatio * QueuedMessages".<br><br>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 A-3: Reviewing the PeopleSoft OLM Component Port List

Many communications exist between 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<br><br>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                      |

## APPENDIX B

# Getting Started with CRM for Higher Education

To fully benefit from the CRM for Higher Education functionality, Oracle recommends that you integrate CRM 9.1 with Campus Solutions 9.0 Feature Pack 2 or higher.

The following lists the features that CRM 9.1 Integrates with Campus Solutions 8.9 and 9.0:

- Limited Prospect Data is pushed from Campus Solutions to CRM.
- Full Sync only for a limited set of Campus Solutions admissions data.
- Both full and incremental PersonBasic Sync.
- Search/Match duplicate prevention with PersonBasic Sync.
- 360 degree view with CRM transactions only
- Full functionality of the CRM System with respect to contact management, mass communications, campaign and event.
- Audience building using PeopleTools Query Access Services provided that both CRM and Campus Solutions are running on PeopleTools 8.5 or higher.

The following information details the features that the CRM 9.1 Integration with Campus Solutions 9.0 Feature Pack 2 provides over the CRM 9.1 Integration with earlier versions of Campus Solutions.

The following lists the features that CRM 9.1 Integrates with Campus Solutions Feature Pack 2 (or higher):

- Control table loading (including Academic Structure, Test IDs, and Test components) synced over to CRM.
- Security constructs (such as Test ID by User, Institution, Career, Program and Plan security by User, etc) synced over from Campus Solutions to CRM so that security in CRM is consistent with Campus Solutions.
- New Prospective Student Import feature allowing fast bulk loading of Suspect and Prospect data into CRM from Campus Solutions, Campus Solutions Test.
- Constituent 360 degree overall view of Student combining CRM and Campus Solutions data.
- Action links to select Campus Solutions pages from Service Center for Higher Education and 360 degree view.
- Real time integration of Prospect, Applicant, and Student data from Campus Solutions to CRM, via incremental syncs.
- Full Constituent Lifecycle support from Suspect and Prospect through to Applicant, Student, and Alumnus.

To use the Query Access Services (QAS) to build audiences in CRM based on criteria in Campus Solutions, you need both the CRM and Campus Solutions systems to be running on PeopleTools 8.50 or higher. With the exception of QAS, all other functionality will work if CRM is on PeopleTools 8.50 or higher, and Campus Solutions is on an older version of PeopleTools.

When installing the CRM products, deselect the Higher Education version to enable all the Higher Education specific display templates.

The following is an example of the General Options page that shows the Product Options for Higher Education:

[Favorites](#) | [Main Menu](#) > [Set Up CRM](#) > [Install](#) > [Installation Options](#)

[General Options](#) | [Calendar Options](#) | [Alt Character](#) | [Anonymous Object](#) | [Billing and Pricing Options](#)

**PeopleSoft Products**

|                                                                    |                                                                         |
|--------------------------------------------------------------------|-------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Advanced Configurator          | <input checked="" type="checkbox"/> Order Capture - Self Service        |
| <input checked="" type="checkbox"/> Banking Transactions           | <input checked="" type="checkbox"/> Partner Commerce                    |
| <input checked="" type="checkbox"/> Bill Presentment               | <input checked="" type="checkbox"/> Partner Marketing                   |
| <input checked="" type="checkbox"/> Client Manager                 | <input checked="" type="checkbox"/> Partner Planning                    |
| <input checked="" type="checkbox"/> CRM Portal Pack                | <input checked="" type="checkbox"/> Partner Platform                    |
| <input checked="" type="checkbox"/> CTI Integration                | <input checked="" type="checkbox"/> Partner Sales                       |
| <input type="checkbox"/> Event Management                          | <input checked="" type="checkbox"/> Partner Service                     |
| <input checked="" type="checkbox"/> HelpDesk                       | <input checked="" type="checkbox"/> Phone Number Administration         |
| <input checked="" type="checkbox"/> HelpDesk for Human Resources   | <input checked="" type="checkbox"/> Policy and Claims Presentment       |
| <input checked="" type="checkbox"/> HelpDesk-Employee Self Service | <input checked="" type="checkbox"/> Real-Time Advisor                   |
| <input type="checkbox"/> Incentive Management                      | <input checked="" type="checkbox"/> Sales                               |
| <input checked="" type="checkbox"/> Integrated FieldService        | <input checked="" type="checkbox"/> Service Center for Higher Education |
| <input checked="" type="checkbox"/> Marketing                      | <input checked="" type="checkbox"/> Smart Views                         |
| <input checked="" type="checkbox"/> Multichannel Communication     | <input checked="" type="checkbox"/> Services Management                 |
| <input checked="" type="checkbox"/> Online Marketing               | <input checked="" type="checkbox"/> Strategic Account Planning          |
| <input type="checkbox"/> Oracle Configurator                       | <input checked="" type="checkbox"/> Support                             |
| <input type="checkbox"/> Oracle Customer Data Hub                  | <input checked="" type="checkbox"/> Support-Customer Self Service       |
| <input checked="" type="checkbox"/> Order Capture                  | <input checked="" type="checkbox"/> TeleSales                           |
|                                                                    | <input checked="" type="checkbox"/> Workforce Communications            |

**Product Options**

- Higher Education
- Offer Management
- Oracle Data Librarian
- Sales Product Configurator
- Third Party Optimization

General Options for Higher Education

# Index

## A

- access information, recording 312
- accessing PS CRM from Enterprise Portal 204
- Active Analytics Framework, loading data 4
- ADCRMPST job definition, using 287
- additional component software
  - understanding integration 91
  - Xpdf 27
- Adobe Graphic Dialog Flow Designer
  - installing on MS Windows 80
  - installing on UNIX for IBM WebSphere 77
  - installing on UNIX for Oracle WebLogic 75
- ADP Taxware 101
  - installing 99
  - integrating with PeopleSoft Order Capture 100
  - testing integration with PeopleSoft OC 102
  - understanding the install 99
  - understanding WorldTax integration 100
- Advanced Configurator
  - contents of CD 205
  - installation summary 206
  - prerequisites 205–206
  - supported databases 205
- Advanced Configurator server
  - installation files and directories 209
  - installing on MS Windows 209
  - running automatically on Solaris 231
- Application Center table, defining new URLs 295
- attachments, storing 4
- auto-numbered fields 6
- auto-numbered IDs 6
- automatic numbering, setting up profiles 80

## B

- basic data summary and messaging, activating 8

- BPEL domain, creating and configuring 312
- BPEL process end points, updating 318
- BPEL process files
  - configuring for deployment 330
  - copying 329
- BPEL, deploying all processes 331
- Business Interlink architecture
  - requiring 64 bit plug-ins 97
  - setting up for tax 96
  - understanding 97
- Business Interlinks
  - editing application server configuration files 98
  - selecting DLLs and shared libraries 98
  - selecting vendor plug-ins 98
- bypass sign-in 39

## C

- changing parameter values 351
- Connectship Prologistics, integrating 91
- correspondence management
  - configuring FTP servers 24
  - copying rtf template files to ftp server 25
  - copying text template files to ftp server 25
  - installing applications for PS CRM 23
  - registering FTP servers 26
- creating a new server on IBM WebSphere 56
- CRM external node connector, setting up 281
- CRM node, testing 282
- CS\_dialogs to start dialog execution, deploying 298
- CTI, configuring 7
- Customer Data Model tablespaces 350
- Cybersource
  - configuring credit card integration 66
  - testing connectivity 20
- Cybersource installation options, defining 17
- Cybersource PSFT\_CYB node setup 17
- Cybersource SOAP

- setting up and configuring the webservice 12
- setting up connectivity for PIA 12
- setting up IBM WebSphere on MS Windows 13
- setting up IBM WebSphere on UNIX 14
- setting up Oracle WebLogic on MS Windows 13
- setting up Oracle WebLogic on UNIX 13

**D**

- data, loading Active Analytics Framework 4
- default user IDs, setting 12
- demo database sizing requirements 3
- DES, *See* Dialog Execution Server
- DES install
  - IBM WebSphere on MS Windows 59
  - IBM WebSphere on UNIX 62
  - testing 69
  - understanding on IBM WebSphere 56
  - understanding on Oracle WebLogic 47
- DES Java options
  - checking on IBM WebSphere 83
  - checking on Oracle WebLogic 83
- Dialog Execution Server
  - installing on IBM WebSphere 56
  - installing on IBM WebSphere on MS Windows 59
  - installing on IBM WebSphere on UNIX 62
  - installing on Oracle WebLogic 47
  - installing on Oracle WebLogic on MS Windows 47
  - installing on WebLogic on UNIX 53
  - starting on IBM WebSphere 64
  - starting on Oracle WebLogic 55
  - testing the installation 69
- domain auditLevel, setting 313
- domain, activating 282, 293

**E**

- E-Mail Response Processor, adding 72
- EIP configuration for PS SA and CRM integration 289
- EIP configuration, setting up and testing 280

- email addresses, assigning 293
- email server, testing 70
- Enterprise Resource Planning (ERP), running 70
- ERP, adding 70

**F**

- freight calculation, setting up 92
- FTP server
  - configuring for CRM attachments 4
  - for Student Administration database 295
  - setting up for file upload for PS OLM 37
- FTP servers
  - configuring for correspondence management 24
  - registering in correspondence management system 26
- full data publish rules, defining 282

**G**

- Gateway connectors, loading 44
- gateway properties, encryption requirements 45
- gateway properties, updating 15
- guest user for PeopleSoft OCSS 86
- guest user, defining 88

**H**

- homepage personalization security, updating permissions 204
- homepage URL for PeopleSoft OCSS 88

**I**

- IBM WebSphere
  - creating a new server 56
  - installing the DES 56
  - starting the DES application 64

**J**

- Java Virtual Machine, checking heap size on DES 83
- JDBC drivers
  - downloading for PeopleSoft OLM 65
  - installing for PeopleSoft OLM 65
  - installing on PeopleSoft Application Server 66
  - installing on the DES 66

JOLT connect string, setting up 289  
 JTA transaction timeout, adjusting 304

**L**

local gateway properties, verifying 280,  
 289

**M**

Mail Service, adding 73  
 Mailcaster, adding 70  
 message container definitions, adding 309  
 message container definitions,  
 verifying 308  
 messages  
   monitoring security 286  
   setting service operations security 286  
 MultiChannel Console link, enabling  
 CTI 7

**N**

new window URL, disabling 89

**O**

Online Marketing parameters 352  
 ORABPEL schema for PeopleSoft Worklist,  
 changing 307  
 Oracle BPEL Process Manager  
   applying patches 303  
   configuring 303  
   installing 302  
 Oracle E-Delivery  
   obtaining install files 2  
   using 2  
 Oracle middle-tier OAS, restarting the  
 instance 312  
 Oracle WebLogic  
   changing the password 208  
   changing the server system  
     password 215  
   installing for PS Advanced  
     Configurator 207  
   installing for PS Advanced Configurator  
     on Sun Solaris 220  
   installing the DES 47  
   installing the Oracle WebLogic  
     server 208  
   running as a service 208  
   starting DES application 55  
   uninstalling 209

Oracle WebLogic Controller  
   activating web services required for the  
     controller 275  
   compiling ProductCatalogueRepository  
     model 249  
   compiling the  
     ProductCatalogueRepository  
       model on MS Windows 261  
   configuring PIA connection 275  
   creating the controller domain on MS  
     Windows 263  
   creating the controller domain on  
     UNIX 251  
   creating the webApplications  
     folder 253  
   creating the WebApplications folder on  
     MS Windows 270  
   deploying 256  
   deploying on MS Windows 272  
   exporting the configuration and running  
     the AE 246  
   exporting the configuration and running  
     the AE on MS Windows 259  
   exporting the XML file 249  
   installing on MS Windows 258  
   installing on UNIX 246  
   installing PS Advanced Configurator on  
     UNIX 246  
   installing PS Visual Modeler on MS  
     Windows 259  
   installing the PS Advanced Configurator  
     on MS Windows 258  
   modifying the application.properties  
     file 255  
   modifying the application.properties file  
     on MS Windows 271  
   modifying the webservices.properties  
     file 254  
   modifying the webservices.properties file  
     on MS Windows 271  
   understanding installation 245  
   updating JNDIDBName.properties 247  
   updating the JNDIDBName.properties  
     on MS Windows 259  
   using web based compilation 250  
   using web based compilation on MS  
     Windows 262  
   verifying PIA connection 277  
 Oracle WebLogic server, changing system  
 password 229

## P

- parameters
  - changing values 351
  - Online Marketing, descriptions 352
- parameters for PeopleSoft OLM 349
- PeopleSoft BPEL End User Monitor, configuring 326
- PeopleSoft BPEL integration, understanding 301
- PeopleSoft Correspondence Management
  - associating printers with server definitions 29
  - reviewing 28
- PeopleSoft CRM
  - accessing through the Enterprise Portal 204
  - understanding installation 1
- PeopleSoft CRM 9.1 and HRMS 9/9.1 integration
  - accessing HD\_360\_REQUEST\_SYNC 144
  - accessing PS CRM local node definition 148
  - accessing PS HCM local node definition 149
  - accessing PS\_HRMS local node 140
  - accessing PSFT CRM local node 137
  - activating service operations 151
  - adding active routing version2 145
  - adding PS CRM trusted node for single signon 143
  - adding PS HCM active routing for version2 152
  - adding PS HCM trusted node for single signon 151
  - prerequisites 135
  - running row level security 147
  - setting up the gateway 136
  - setting up the PS CRM database 148
  - understanding 135
- PeopleSoft CRM BPEL processes, deploying 328
- PeopleSoft CRM database, setting up web template URL 293
- PeopleSoft CRM for Oracle EBS
  - applying patches for incremental sync 127
  - configuring the EBS\_HR node 114
  - configuring the process scheduler for fullsync 106
  - configuring the PSFT\_CRM node 113
  - creating new business events for target URLs 126
  - integrating using incremental sync 108
  - locating fullsync data files 106
  - prerequisites 104
  - publishing 360-Degree WSDLs 128
  - publishing WSDLs for incremental sync 111
  - retrieving and copying fullsync files 106
  - setting the encryption key 127
  - setting up action links 121
  - setting up basic business events subscriptions 122
  - setting up local gateway for incremental sync 108
  - setting up nodes for PeopleSoft 360-Degree 113
  - setting up service operations for fullsync 104
  - understanding integration 103
  - using fullsync 104
  - using PeopleSoft 360-Degree 113
  - verifying handlers for 360-Degree 119
  - verifying handlers for incremental sync 110
  - verifying nodes for incremental sync 111
  - verifying routings for 360-Degree 120
  - verifying routings for incremental sync 110
  - verifying schemas for fullsync 105
  - verifying schemas for incremental sync 109
  - verifying service operations for 360-Degree 117
  - verifying service operations for incremental sync 109
  - verifying setup 129
- PeopleSoft CRM FTP server, defining 295
- PeopleSoft CRM OLM, prerequisites 35
- PeopleSoft CRM to SA, posting dialog questions 299
- PeopleSoft Enterprise environment, restarting 328

- PeopleSoft for BPEL integration,
  - configuring 314
- PeopleSoft freight calculation
  - setting up 92
  - testing 95
  - understanding 91
- PeopleSoft Gateway URL, configuring 8
- PeopleSoft HCM 9/9.1, setting up the database 135
- PeopleSoft HRMS 8.9 with HRHD
  - activating 360-Degree messages in PS HRMS 169
  - activating HR\_HELPDESK\_360 EIP messages 169
  - activating link category for PS HRMS 8.9 178
  - activating message channel or queue 168
  - activating PS CRM 91 and HRMS 89 service ops for Tools 8.48 and up 173
  - activating PS HRMS 89 PSFT\_CR transactions 170
  - confirming channel HD\_360\_SETUP is running 168
  - confirming queue HD\_360\_SETUP is running 168
  - pinging PS CRM and HRMS nodes 167
  - prerequisites 156
  - setting up connector IDs 161
  - setting up portal content links 176
  - setting up PS CRM node connector IDs 161
  - setting up PS HRMS gateway on Tools 8.48 and up 160
  - setting up PS HRMS gateway on Tools prior to 8.48 158
  - setting up PS HRMS node connector IDs 162
  - setting up PS Single Signon 164
  - setting up the PS CRM gateway 156
  - setting up URL gateway 156
  - understanding integration 155
  - understanding URL gateway setup 156
- PeopleSoft HRMS 8.9, integrating with CRM 9.1 155
- PeopleSoft Integration Broker
  - activating the domain 11
  - configuring Enterprise service settings 316
  - configuring the BPEL node 317
  - configuring the gateway 315
  - confirming access 316
  - setting up 8
  - setting user IDs on nodes 12
  - verifying access 328
- PeopleSoft integration, setting security properties 45
- PeopleSoft OC, integrating with PS Advanced Configurator 237
- PeopleSoft OLM, *See* Online Marketing
- PeopleSoft OLM 9.1 and SA 8.9 and 9.0 prerequisites 279
- PeopleSoft OLM for SA Integration, prerequisites 288
- PeopleSoft OLM integration points, setting up 44
- PeopleSoft Online Marketing
  - configuring system parameters 35
  - integrating with PeopleSoft Student Administration 279
- PeopleSoft Order Capture
  - integrating with ADP Taxware 101
- PeopleSoft Order Capture Self Service
  - assigning permissions to OLM user 41
  - registering PS OLM users 41
- PeopleSoft Order Capture Self-Service
  - assigning roles to PS OLM users 43
  - guest user role 86
  - homepage URL 88
  - setting up 85
- PeopleSoft SA to PeopleSoft CRM, running the fullsync integration 297
- PeopleSoft self-service permissions, understanding 41
- PeopleSoft Student Administration FTP server, defining 295
- PeopleSoft Unified Agent Desktop
  - configuring action buttons 339
  - configuring agent presence codes 338
  - configuring the Oracle proxy-enabled server 334
  - configuring user as a PeopleSoft UAD MCF agent 337
  - configuring user as a PeopleSoft UAD voice agent 335
  - editing hover navigation iFrame template 347
  - editing PeopleSoft MultiChannel toolbar 344

- editing PS PeopleTools 8.50 default template 345
  - editing PS PeopleTools 8.50 frames template 346
  - enabling PeopleSoft CRM UAD 343
  - enabling PeopleSoft UAD pagelet for homepage 343
  - overriding text of system-defined entries 339
  - prerequisites 334
  - understanding 333
  - updating branding 343
  - validating PeopleSoft MultiChannel Framework REN 334
- PeopleSoft Visual Modeler
  - in relation to Advanced Configurator 207
- PeopleSoft Worklist web service, configuring 318
- PeopleTools, installing 2
- performance
  - improving PS OLM transactions 82
  - maximizing for Survey ACE reports 82
- permissions, PeopleSoft OCSS 41
- Portal Pack
  - granting access for homepage personalization 203
  - installing 203
  - understanding 203
- portal user roles, adding 204
- prerequisites
  - adding message container definitions for BPEL 309
  - verifying message container definitions for BPEL 308
- profile-related data integrity in the PeopleSoft CRM, cleaning up 296
- profiles
  - populating attribute choices 296
  - setting up 80
  - setting up automatic numbering 80
  - setting up non English based reserved word 81
- proxy server settings, modifying 14
- PS Advanced Configurator
  - installing and integrating with PS Order Capture 240
  - installing multiple instances on MS Windows 242
  - installing on Sun Solaris 219
  - installing Oracle WebLogic 10.3.1 application server 220
  - installing Oracle WebLogic on Sun Solaris 220
  - installing the configurator server 209
  - integrating with PS Order Capture 237
  - resetting the port 218, 231
  - setting the XML encoding option 218, 232
  - setting up a proxy for integration 241
  - setting up the database 219
  - uninstalling 216
  - uninstalling the Oracle WebLogic server 221
  - using multiple Oracle WebLogic server installations 243
  - using single Oracle WebLogic server installations 243
- PS Advanced Configurator server
  - configuring on MS Windows 216
  - configuring on Sun Solaris 229
  - installing on Sun Solaris 221–222
  - setting the XML encoding option on Sun Solaris 232
  - starting on MS Windows 216
  - starting on Sun Solaris 229
  - uninstalling 229
- PS Connector and Oracle EM Console
  - configuring the PS Connector 199
  - copying JAR files 196
  - deploying and registering the PS Connector 196
  - troubleshooting registration 198
- PS Connector and Oracle Enterprise Manager Console
  - deploying and configuring 195
  - prerequisites 195
- PS CRM and CS for HE 360-Degree View
  - activating PS HE 360 189
  - configuring PS CS to define integration data 191
  - defining PSFTTARGET connector ID for nodes 187
  - pinging PS CRM and CS nodes 188
  - prerequisites 183
  - setting up authentication option for PSFT\_CR node 186
  - setting up PeopleSoft Single Signon 185

- setting up portal content for action links 192
- setting up PS CRM and CS nodes 186
- setting up the gateway 183
- PS OLM
  - integrating with PS CRM 33
  - tablespaces 349
  - understanding messages 44
- PS SA external node, setting up 290
- PS Visual Modeler
  - installing 233, 247
  - installing on MS Windows 233
  - understanding 233
  - uninstalling 237
- PS\_FILEDIR, setting the environment variable 39
- PSFT\_OLM node, setting up the URL 46

**R**

- required local node routings, verifying 289

**S**

- SAD\_CRM\_SYN2 process definition, using 288
- search collection, creating on UNIX 3
- secureFileKeystorePasswd, encryption requirements 45
- security
  - granting for AE Processes in PS SA database 287
  - granting for new pages in PS SA database 287
- service configuration, setting up 10
- service operations, monitoring 298
- services
  - creating and removing for MS Windows 59
  - deleting 74
  - starting 74
  - stopping 74
- setEnv.cmd on MS Windows
  - configuring for Oracle WebLogic on IBM WebSphere 14
- setEnv.sh on UNIX
  - configuring for Oracle WebLogic on IBM WebSphere 15
- SETID for inbound EIP data, defining 294
- setting up PeopleSoft OCSS 85

- sign-in, bypassing 39
- special PeopleSoft environment, configuring 315
- standalone dialog servers, adding 70–71
- standalone dialog servers, understanding 70
- Student Administration
  - integrating database with PeopleSoft OLM 280
  - integrating with PeopleSoft Online Marketing 279
- student data, populating 297
- Sun Java mail files
  - defining the CLASSPATH 30
- Sun Java Virtual Machine, tuning and setting proxy values 304
- system
  - parameters for PeopleSoft OLM 35
  - tuning 81

**T**

- tablespaces
  - Customer Data Model 350
  - PeopleSoft Online Marketing 349
- testing
  - ADP Taxware integration with PeopleSoft OC 102
  - PeopleSoft CRM default local node 291
  - PeopleSoft SA node 292
  - the email server 70
- timeout adjustment 307
- transactions, improving performance 82
- TS189 processes to post data, running 298

**V**

- Vertex
  - installing 99–100
  - installing for MS Windows 100
  - installing for UNIX 100
  - understanding the install 99

**W**

- Watch Dog, adding 70, 74
- web profile, setting up to bypass sign-in 39
- web services, activating 323
- WorldTax, *See* Taxware

**X**

- XML encoding, setting for PS Advanced  
Configurator server on Sun Solaris 232

- XMLP

  - configuring user selected font 28
  - modifying fonts 28

- Xpdf

  - installing 27
  - printing correspondence  
management 27