PEOPLESOFT ENTERPRISE

PeopleSoft Enterprise CRM 8.9 Supplemental Installation Guide

December 2009

Installation Instructions for PeopleSoft 8.9 CRM Applications

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CHAPTER 1

INSTALLING PEOPLESOFT ENTERPRISE CRM 8.9 APPLICATIONS

This guide explains the steps necessary to install PeopleSoft Enterprise CRM 8.9 applications. You perform the steps in this guide after you have successfully completed installation of PeopleTools, as described in the *PeopleTools 8.45 Installation and Administration PeopleBook* for your database platform.

Application productivity packs are the way we deliver cumulative fixes and minor enhancements between service packs of an application major/minor release. They are particularly useful for customers upgrading or implementing a new release, and wish to get 'current' on the latest updates and fixes, before or shortly after go-live.

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Note. Before proceeding with your installation, check My Oracle Support to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook*.

> **Note**. We recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes this chapter's tasks.

Task No.	Task Name
Task 1-1	Install PeopleTools and Create the PeopleSoft Enterprise CRM Database
Task 1-2	Set Up Installation Defaults Scripts for the PeopleSoft Enterprise CRM 8.9 System (SYS) Database
Task 1-3	Load Active Analytics Framework Data into the PeopleSoft Enterprise CRM 8.9 System (SYS) Database
Task 1-4	Configure a FTP Server for Storing Attachments
Task 1-5	Set the Starting Values for Auto-numbered Fields
Task 1-6	Install PeopleSoft Enterprise Mobile Agent (PeopleSoft Enterprise Mobile Integrated FieldService, Mobile Sales, and Mobile Order Capture)
Task 1-7	Configure CTI
Task 1-8	Activate the Basic Data Summary and Messaging Mechanism

Task 1-1: Install PeopleTools and Create the PeopleSoft Enterprise CRM Database

For details, see the *PeopleTools 8.45 Installation and Administration PeopleBook* for your database platform.

PeopleTools Version Requirement

The minimum PeopleTools patch level required is PeopleTools 8.45.02.

PeopleSoft Enterprise CRM 8.9 Demo Database Sizing Information by Platform

Platform	Approximate Database Size
Oracle Ansi	5.6 GB
Oracle Unicode	5.6 GB
DB2 z/OS Ansi	4.4 GB

Platform	Approximate Database Size
DB2 z/OS Unicode	7.8 GB
DB2 UDB Ansi	7.0 GB
DB2 UDB - Unicode	9.0 GB
Sybase Ansi	5.5 GB
Sybase Unicode	7.5 GB
MS SQL Server Ansi	2.0 GB
MS SQL Server Unicode	6.0 GB

Note. For SYBASE only:

The minimum ASE release required to run PeopleSoft Enterprise CRM 8.9 is Sybase ASE 12.5.0.1 ESD#4 using a 4K-page size for Ansi databases.

For Unicode databases, the minimum release required is Sybase ASE 12.5.0.3 ESD#4 using an 8K-page size.

For HP-UX, please verify that your environment variable LC_ALL has the following setting: american.iso88591.

PeopleSoft Enterprise CRM requires that you specify a Process Scheduler server to be used for workflow processes. If you choose to have a dedicated server for workflow, make sure you set one up as you complete the tasks in the *PeopleTools 8.45 Installation and Administration PeopleBook*, "Setting up Process Scheduler." Regardless of whether you set up a dedicated server, you must specify a PeopleSoft Enterprise CRM workflow server.

For more information about specifying a workflow server, see the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft Enterprise CRM Workflow".

Note. PeopleSoft Enterprise CRM applications do not use any COBOL batch processes. If PeopleSoft Enterprise CRM is the only PeopleSoft product line you are installing, you do not need to run PSRUN.MAK or compile or link any COBOL programs.

To enable users to search records and documents in your PeopleSoft Enterprise CRM applications, you must first create a collection in your database. A collection is a set of special directories and files that the search engine uses to find and display source documents that match the criteria that you enter on the search page. You must perform the following step to configure UNIX servers to locate the PeopleSoft Enterprise CRM search collection.

Note. Minimum requirements for PeopleSoft Enterprise CRM 8.9 Multi-Language for Korean are PeopleTools PT8.46 and PeopleSoft Enterprise CRM 8.9 MP3.

Installation sequence is:

1. Install CRM 8.9 Application CD.
2. Install CRM 8.9 Multi-Language Rev 1 CD.
3. Create the CRM 8.9 database.
4. Install CRM 8.9 Maintenance Pack 3.
5. Update the database to PeopleTools PT8.46.
6. Install CRM 8.9 Maintenance Pack 3 Multi-Language.

To Configure UNIX Servers to Locate the PeopleSoft Enterprise CRM Search Collection:

1. (UNIX servers only) Link the UNIX utilities sh and chmod into the <PS_HOME> directory of each Process Scheduler server.

2. Enter these two commands:

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

Task 1-2: Set Up Installation Defaults Scripts for the PeopleSoft Enterprise CRM 8.9 System (SYS) Database

Run the following script against the SYSTEM (SYS) database only for PeopleSoft Enterprise CRM:

- CRINSSYS.DMS – Installation Defaults: This script establishes the installation defaults for the database. This only runs against the SYSTEM (SYS) database.

Task 1-3: Load Active Analytics Framework Data into the PeopleSoft Enterprise CRM 8.9 System (SYS) Database

To Load Active Analytics Framework Data into PeopleSoft Enterprise CRM 8.9 Databases:

1. Connect to the PeopleSoft Enterprise CRM 8.9 database using Data Mover (psdmt.exe) using a User ID and Password.

2. Run the 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 the Active Analytics Framework Objects such as Terms, Policies, Contexts, Action Types, and Trigger Points into the PeopleSoft Enterprise CRM database.

> **Note.** PeopleSoft provides translations of all end-user objects, including the datamover scripts and dat files referenced here, on the "Global Multi-Language" CD. For Active Analytics Framework data, we deliver 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.

Task 1-4: Configure a FTP Server for Storing Attachments

PeopleSoft Enterprise CRM applications enable you to add notes and attach supporting files to many objects. The attached files are physically stored on an FTP server. With this task, you specify the URLs that the applications use 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.

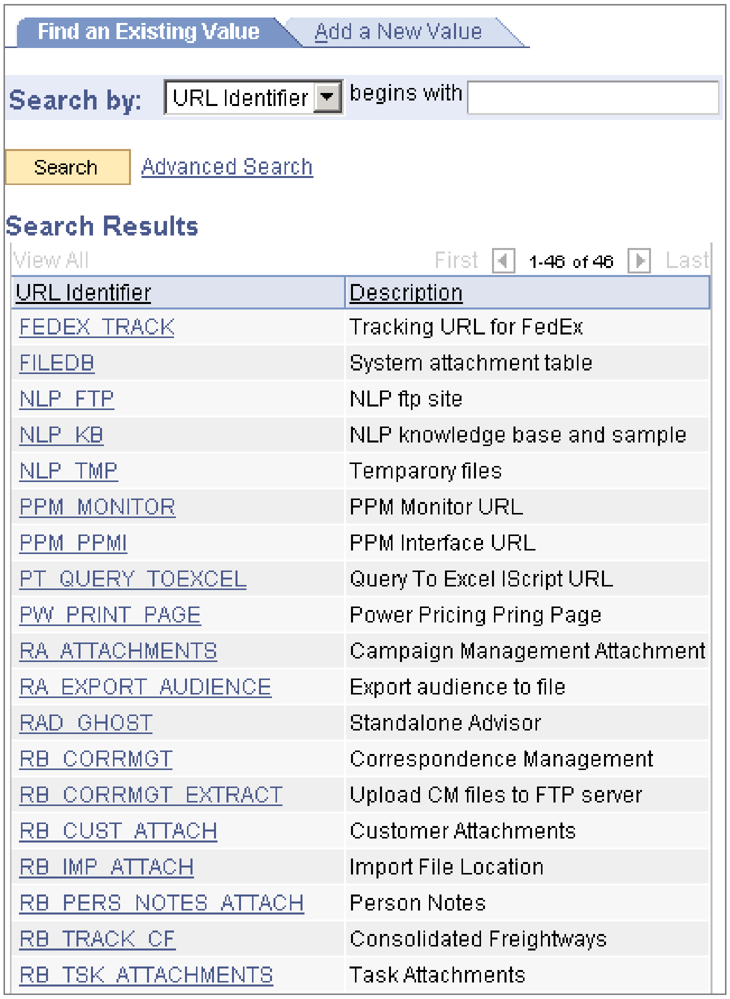
2. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.

3. Select **PeopleTools, Utilities, Administration, URLs**.

4. Click the Search button on the URL Maintenance search page.

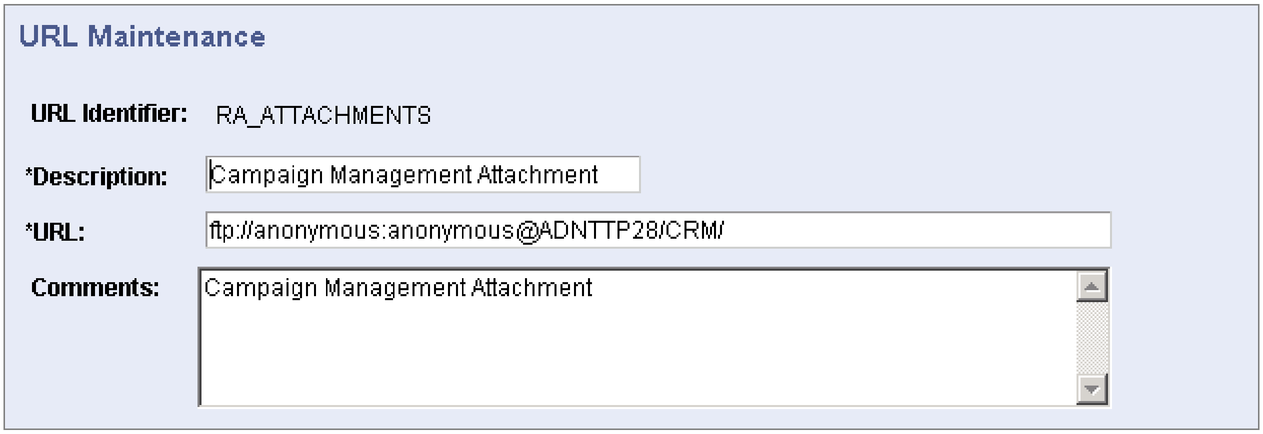
   The database includes predefined URL identifiers as shown below. Each of these identifiers represents a particular type of attachment that is available in PeopleSoft Enterprise CRM. The description indicates which PeopleSoft Enterprise CRM product each identifier relates to.

> **Note.** The URL Identifier RF_FDM_LINKS is not related to attachments. It is used in certain integration scenarios between PeopleSoft Enterprise CRM and PeopleSoft Supply Chain. For more information, see the *PeopleSoft CRM Integrated FieldService 8.9 PeopleBook,* "Integrating With PeopleSoft Applications".



URL Maintenance Search page

5. For each type of attachment you plan to use, select the URL identifier and enter the URL for the FTP server the application should use to access this type of attachment.



URL Maintenance page

Note. For more information about the URL Maintenance page, refer to the *PeopleTools 8.45 PeopleBook*.

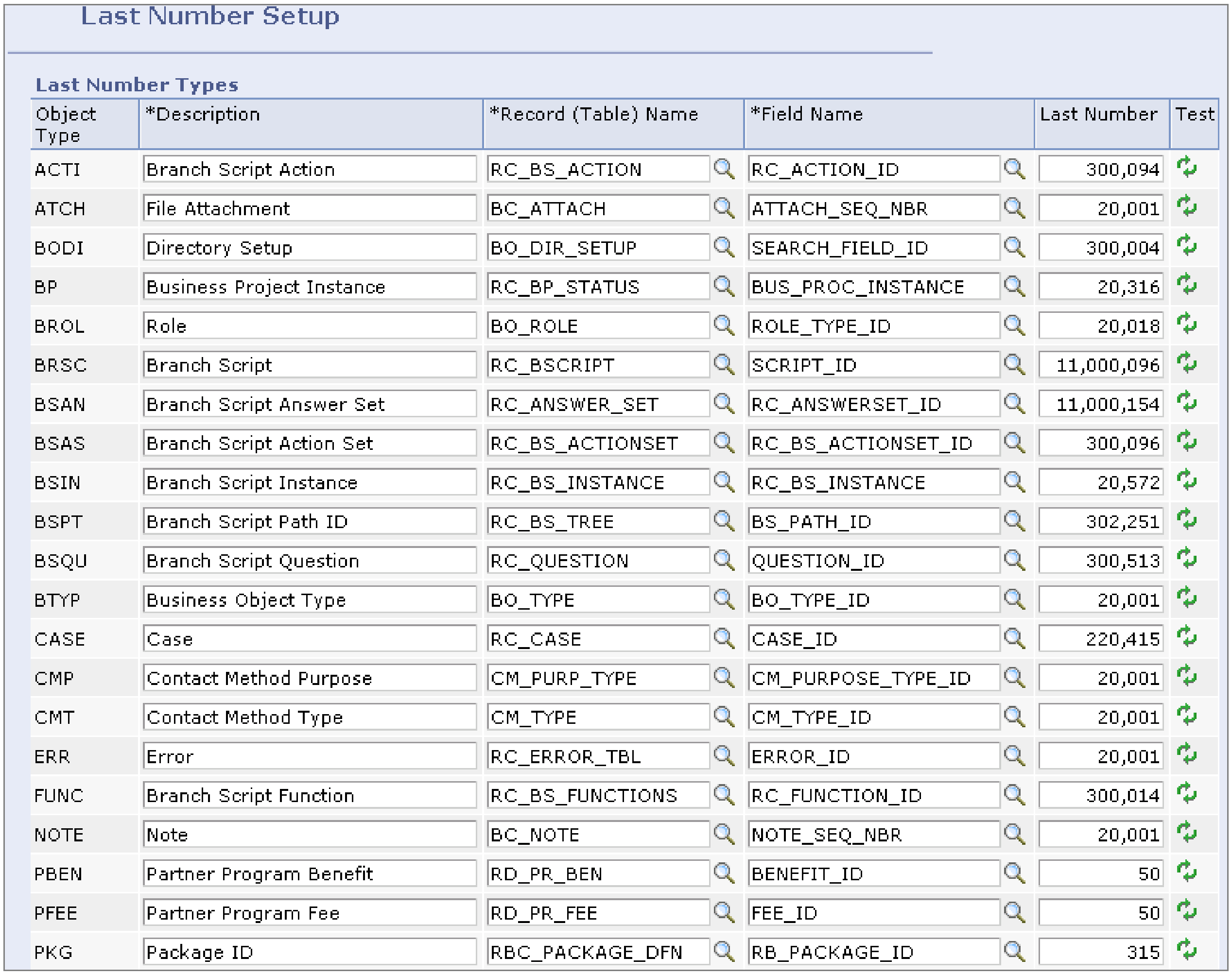
Task 1-5: Set the Starting Values for Auto-numbered Fields

To Set the Starting Values for Auto-numbered Fields:

To set the starting value for objects that utilize the Last Number page (rather than the Auto numbering page) to generate auto numbered IDs, complete the following:

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

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



Last Number Setup

Last Number Types

Object Type	*Description	*Record (Table) Name	*Field Name	Last Number	Test
ACTI	Branch Script Action	RC_BS_ACTION	RC_ACTION_ID	300,094	
ATCH	File Attachment	BC_ATTACH	ATTACH_SEQ_NBR	20,001	
BODI	Directory Setup	BO_DIR_SETUP	SEARCH_FIELD_ID	300,004	
BP	Business Project Instance	RC_BP_STATUS	BUS_PROC_INSTANCE	20,316	
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018	
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,096	
BSAN	Branch Script Answer Set	RC_ANSWER_SET	RC_ANSWERSET_ID	11,000,154	
BSAS	Branch Script Action Set	RC_BS_ACTIONSET	RC_BS_ACTIONSET_ID	300,096	
BSIN	Branch Script Instance	RC_BS_INSTANCE	RC_BS_INSTANCE	20,572	
BSPT	Branch Script Path ID	RC_BS_TREE	BS_PATH_ID	302,251	
BSQU	Branch Script Question	RC_QUESTION	QUESTION_ID	300,513	
BTYP	Business Object Type	BO_TYPE	BO_TYPE_ID	20,001	
CASE	Case	RC_CASE	CASE_ID	220,415	
CMP	Contact Method Purpose	CM_PURP_TYPE	CM_PURPOSE_TYPE_ID	20,001	
CMT	Contact Method Type	CM_TYPE	CM_TYPE_ID	20,001	
ERR	Error	RC_ERROR_TBL	ERROR_ID	20,001	
FUNC	Branch Script Function	RC_BS_FUNCTIONS	RC_FUNCTION_ID	300,014	
NOTE	Note	BC_NOTE	NOTE_SEQ_NBR	20,001	
PBEN	Partner Program Benefit	RD_PR_BEN	BENEFIT_ID	50	
PFEE	Partner Program Fee	RD_PR_FEE	FEE_ID	50	
PKG	Package ID	RBC_PACKAGE_DFN	RB_PACKAGE_ID	315	

Last Number Setup page

If you want to modify the values later, you can do so using the Last Number page.

> **Note.** For information on setting last number values, see *PeopleSoft Enterprise CRM Application Fundamentals PeopleBook*, "Setting General Options".

Task 1-6: Install the PeopleSoft Enterprise Mobile Agent (PeopleSoft Enterprise Mobile Integrated FieldService, Mobile Sales, and Mobile Order Capture)

If you are installing PeopleSoft Enterprise Mobile Sales or Mobile Integrated FieldService, you must first install the PeopleSoft Enterprise Mobile Agent.

> **Note.** For instructions on installing the PeopleSoft Mobile Agent to a mobile device, see the *PeopleSoft Mobile Agent PeopleBook* or the *PeopleTools 8.45 Installation Guide: Appendix C.*

Task 1-7: Configure CTI

PeopleSoft PeopleTools provides a header link, the MultiChannel Console link, for enabling CTI. To make this link visible, you must set up the user as a CTI agent. For more information, see the *PeopleSoft Enterprise CRM Application Fundamentals PeopleBook,* "Configuring CTI Application Pages."

Task 1-8: Activate the Basic Data Summary and Messaging Mechanism

When the PeopleSoft Enterprise CRM system is delivered, the messaging mechanism and basic data summary are inactive. They need to be activated to allow the Online Marketing basic profile population to occur.

Note. This task is required if you are installing PeopleSoft Marketing or Online Marketing applications. See *PeopleSoft Enterprise CRM 8.9 Supplemental Installation Guide,*” Installing PeopleSoft Online Marketing”.

CHAPTER 2

INSTALLING PEOPLESOFT ENTERPRISE CRM 8.9 BUSINESS ANALYSIS MODELER INTERACTIVE REPORTS

This chapter provides instructions for installing and setting up PeopleSoft Enterprise CRM Interactive Reports, multi-dimensional online reports based on the Business Analysis Modeler (BAM) tool shipped with PeopleSoft Enterprise CRM.

Note. We recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes this chapter's tasks.

Task No.	Task Name
Task 2-1	Perform Program Management
Task 2-2	Configure the Environment
Task 2-3	Validate Connectivity
Task 2-4	Debug Installation Steps

Before You Begin

PeopleSoft Business Analysis Modeler (BAM) Interactive Reports provide multi-dimensional calculation and data presentation.

The following sections in detail the optional installation steps for these applications.

For additional instructions, see the *PeopleSoft Enterprise Components PeopleBook, Common Objects and Components*, “Using Interactive Reports”.

Prerequisites

1. Install the PeopleSoft database and applications licensed by the customer.

2. Install the PeopleSoft Business Analysis Modeler (BAM) 8.8 components. See PeopleSoft Business Analysis Modeler 8.8 Installation Guide, Chapter 3, Installing a Reporting Environment. This step includes installation of the database drivers and DSN creation on the BAM web server(s).

3. Retrieve and apply all PeopleSoft Business Analysis Modeler 8.8 bundles from Customer Connection.

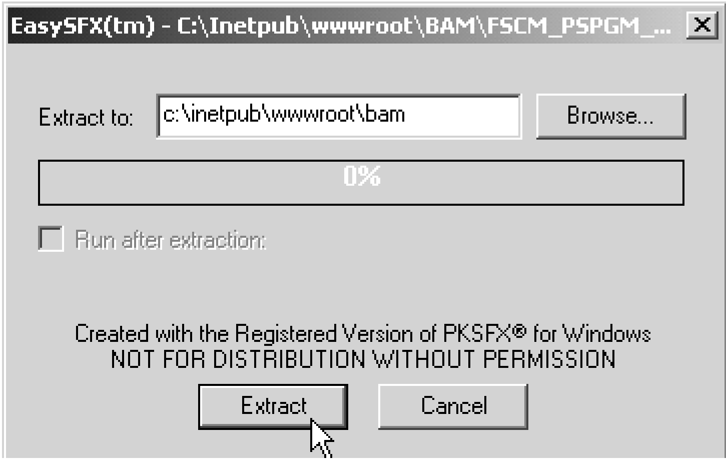
Task 2-1: Perform Program Management

To Perform Program Management:

1. From the CRM VCD, copy <ps_home>\web\ CRM_PSCSA_BAM.exe, CRM_PSFS_BAM.exe, CRM_PSMKT_BAM.exe, CRM_PSOCI_BAM.exe, CRM_PSHD_BAM.exe, CRM_PSSU_BAM.exe, CRM_PSTM_BAM.exe, CRM_PSOMK_BAM.exe, and EO_PSEOBF_BAM.exe to c:\inetpub\wwwroot\bam on the BAM web server.

2. Run c:\inetpub\wwwroot\bam\ CRM_PSCSA_BAM.exe, CRM_PSFS_BAM.exe, CRM_PSMKT_BAM.exe, CRM_PSOCI_BAM.exe, CRM_PSHD_BAM.exe, CRM_PSSU_BAM.exe, CRM_PSTM_BAM.exe, CRM_PSOMK_BAM.exe, and EO_PSEOBF_BAM.exe on the BAM web server to extract the BAM report directories and files. Extract to: c:\inetpub\wwwroot\bam

Note. PeopleSoft provides translations of all end-user objects, including the BAM Models and pageview files referenced here, on the "Global Multi-Language" CD. The file names are CRM_PSCSA_BAM_XXX.exe, CRM_PSFS_BAM_XXX.exe, CRM_PSMKT_BAM_XXX.exe, CRM_PSOCI_BAM_XXX.exe, CRM_PSHD_BAM_XXX.exe, CRM_PSSU_BAM_XXX.exe, CRM_PSTM_BAM_XXX.exe, CRM_PSOMK_BAM_XXX.exe and EO_PSEOBF_BAM_XXX.exe where XXX denotes the language code.



Extract to Directory Selection dialog

3. Confirm that the appropriate directories have been created from the extracts. The directories for the appropriate products can be found as follows:

- BAM Server for Sales C:\inetpub\wwwroot\BAM\pscsa\
- BAM Server for FieldService C:\inetpub\wwwroot\BAM\psfs\
- BAM Server for HelpDesk C:\inetpub\wwwroot\BAM\pshd\
- BAM Server for Marketing C:\inetpub\wwwroot\BAM\psmkt\
- BAM Server for Orders & Quotes C:\inetpub\wwwroot\BAM\psoci\
- BAM Server for Dialog C:\inetpub\wwwroot\BAM\psomk\
- BAM Server for Support C:\inetpub\wwwroot\BAM\pssu\
- BAM Server for Telemarketing C:\inetpub\wwwroot\BAM\pstm\
- BAM Server for Enterprise Components C:\inetpub\wwwroot\BAM\pseobf\
  (This consists of a test BAM report.)

4. Select **Enterprise Components, Interactive Report Definitions, Servers** to define the server.

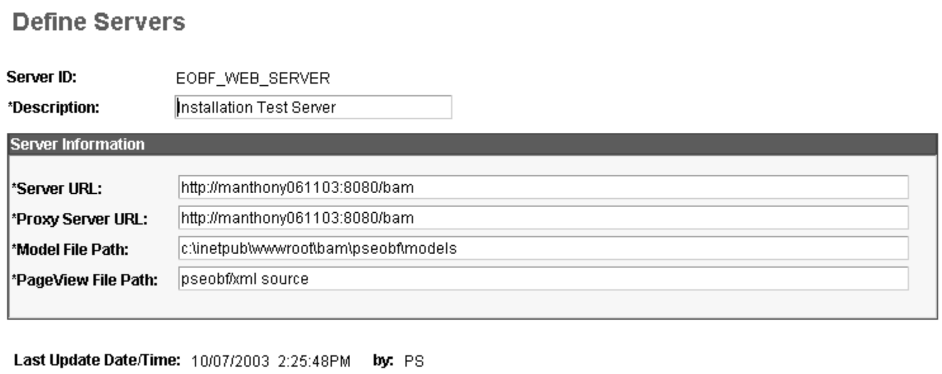
5. Choose the Add a New Value tab. Enter a unique server ID for the BAM Analytic Web Server you installed.

   The server URL should follow the http://<server_name>:<port>/bam syntax. You must specify the IIS port if it is other than 80. If you are working in a proxy server environment, enter the proxy server URL for the ‘Proxy Server URL’ field. If you do not have a proxy server environment, copy the ‘Server URL’ entry to the ‘Proxy Server URL’ field.

   The model file path is a physical path to the location you installed the BAM model file in step 2. Typically this will be ‘c:\inetpub\wwwroot\bam\pseobf\models’ for this installation test.

   The PageView file path is also referencing step 2. It is a relative path under c:\inetpub\wwwroot\bam, and note that forward slashes are used. Typically the entry will be ‘pseobf/xml source’ for this installation test.

6. When your entries are complete, click Save and continue to the next step.



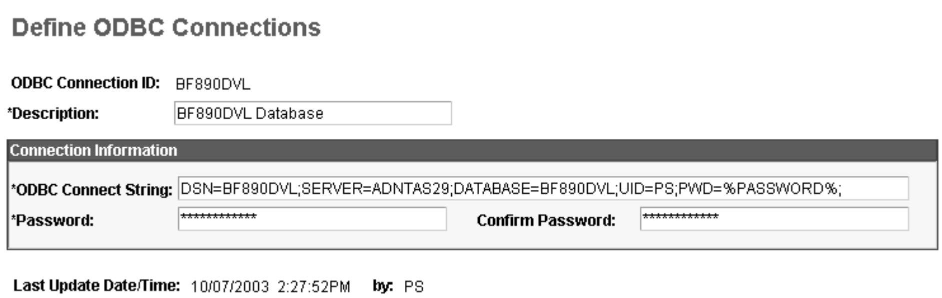
Define Servers page

7. Select **Enterprise Components, Interactive Report Definitions, ODBC Connections** to define the ODBC Connection.

8. Select the Add a New Value tab. Enter a unique connection ID for the PeopleSoft database you installed.

9. This page defines the connection string BAM will use to retrieve data from the PeopleSoft database. Each platform requires a slightly different syntax (see table below). The user ID (UID) in the connection string should have at least ‘Select’ privileges on the PeopleSoft database.

10. When your entries are complete, click Save and continue to the next step.



Define ODBC Connections page

The following table includes the connection string syntax for use by Platform:

Platform	Connection String Syntax
Microsoft	DSN=<Data Source>;SERVER=<Server Name>;DATABASE=<Database Name>;UID=<UserID>;PWD=%PASSWORD%;
Oracle	DSN=<Data Source>;UID=<User ID>;PWD=%PASSWORD%; DBTYPE=ORACLE;
DB2 Unix	DSN=<Data Source>;UID=<UserID>;PWD=%PASSWORD%; SCHEMA=<Schema Owner>;
DB2 OS390	DSN=<Data Source>;UID=<UserID>;PWD=%PASSWORD%;SCHEMA=<Schema Owner>;SQLID=<Database Name>
Sybase	DSN=<Data Source>;UID=<UserID>;PWD=%PASSWORD%;DBTYPE=SYBASE;

Platform	Connection String Syntax
Informix	DSN=<Data Source>;UID=<UserID>;PWD=%PASSWORD%;

Task 2-2: Configure the Environment

To Configure the Environment:

1. Select **Enterprise Components, Interactive Report Definitions, Environment Configurations.**

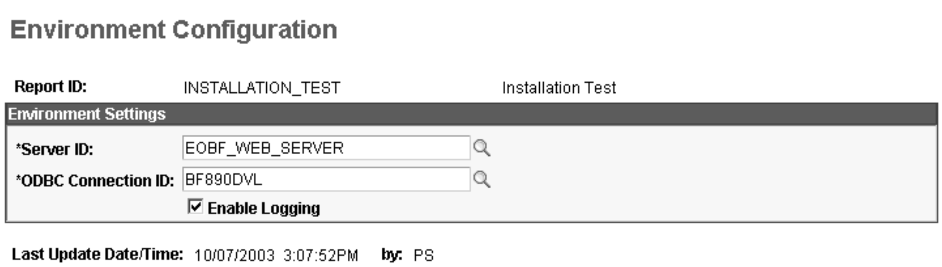
2. Search for the report ID ‘INSTALLATION_TEST’.

3. Select the Server ID and the ODBC Connection ID you defined previously.

4. Select the checkbox ‘Enable Logging’ to turn on logging of the commands between the PeopleTools Application Server and the BAM Web Server. The default location of the log file is on the BAM Web Server in c:\inetpub\wwwroot\bam\logyyyymmm.txt, unless modified during the installation process.

Note. See the PeopleSoft Business Analysis Modeler 8.8 Installation Guide and the BAM Administration Guide for more details about logging on the BAM Web Server.

5. When your entries are complete, click Save and continue to the next step.



Enrollment Configuration page

Note. If messages indicating failure appear in the ‘Result’ field after clicking any of these buttons, you should follow the debugging steps.

Note. If your installation uses multiple web servers for PeopleSoft Business Analysis Modeler's load balancing features, you must perform these steps on each web server.

Task 2-3: Validate Connectivity

The following describes the steps to install and configure a sample report to validate connectivity. Similar configuration steps are required during the installation or implementation of the reports delivered by the applications listed above.

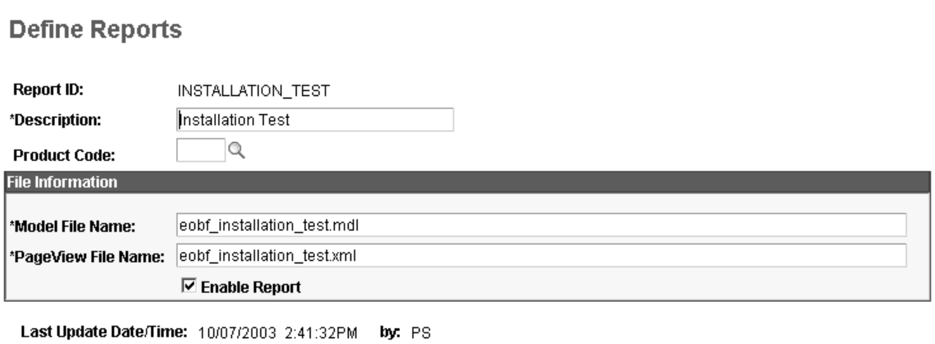
Note. For additional instructions, see *PeopleSoft Enterprise Components PeopleBook, Common Objects and Components,* "Using Interactive Reports".

To Install a Sample Report to Validate Connectivity:

1. Select **Enterprise Components, Interactive Report Definitions, Reports** to validate the report definition.

2. Search and open the report ID 'INSTALLATION_TEST'.

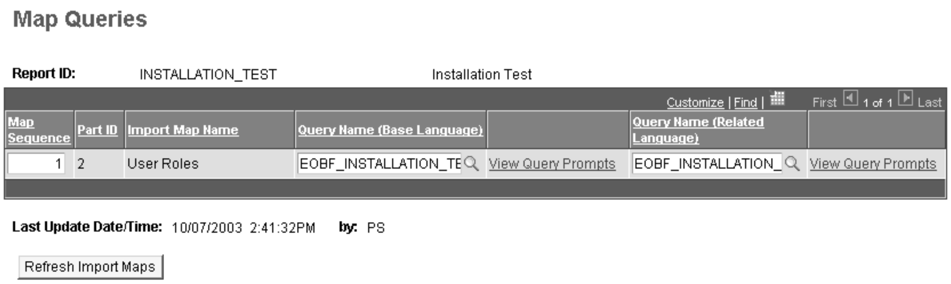
3. Verify that the entries on the report definition match the screen shot below.



Define Reports page

4. Select **Enterprise Components, Interactive Report Definitions, Queries** to validate the query mappings.

5. Search for the report ID 'INSTALLATION_TEST' (see the page below). Verify that the entries on the report definition match the screen shot below.



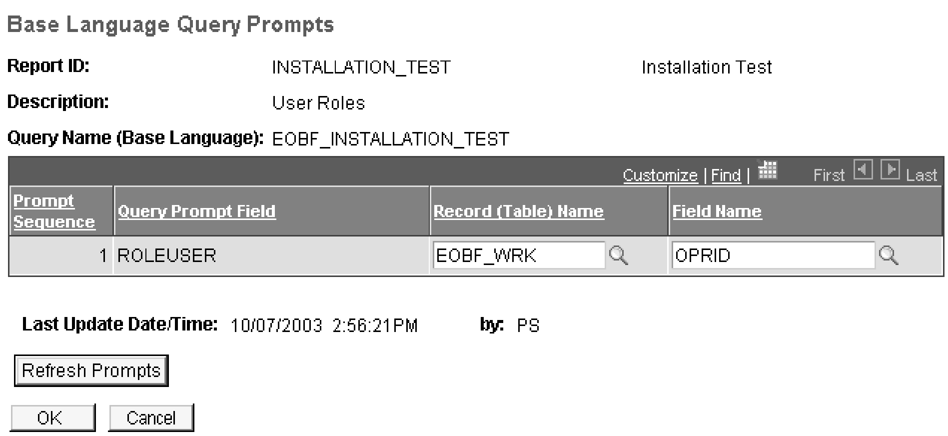
Map Queries page

6. Select **Enterprise Components, Interactive Report Definitions, Queries** to validate the query prompts.

7. Click the 'View Query Prompts' link next to the 'Query Name (Base Language)' field to see a secondary page appear with the prompt entries for the noted PeopleSoft Query.

8. Verify the entries on the report definition match the screen shot below. These entries are system data delivered by Enterprise Components for IVT purposes.

Note: Similar entries should exist on the secondary page for 'Query Name (Related Language)'

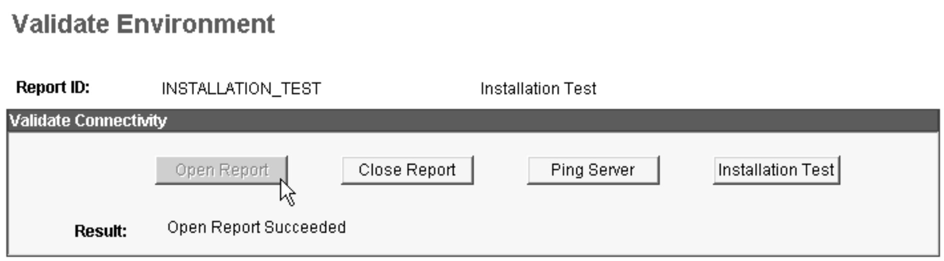


Base Language Query Prompts page

9. Select **Enterprise Components, Interactive Report Definitions, Validate Environment** to validate the environment.

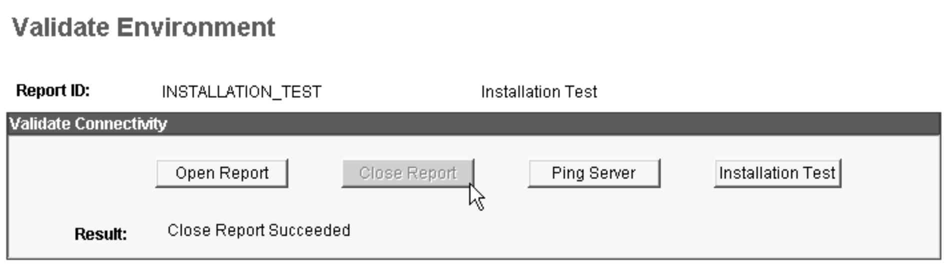
10. Search and select the report ID 'INSTALLATION_TEST'.

11. Click the 'Open Report' button. You should receive an 'Open Report Succeeded' message in the 'Result' field as shown below.



Validate Environment page - Open Report Succeeded

12. Click the ‘Close Report’ button. You should receive a ‘Close Report Succeeded’ message in the ‘Result’ field as shown below.

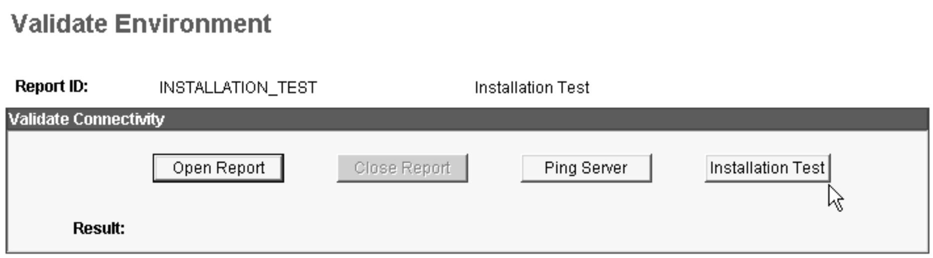


Validate Environment page – Close Report Succeeded

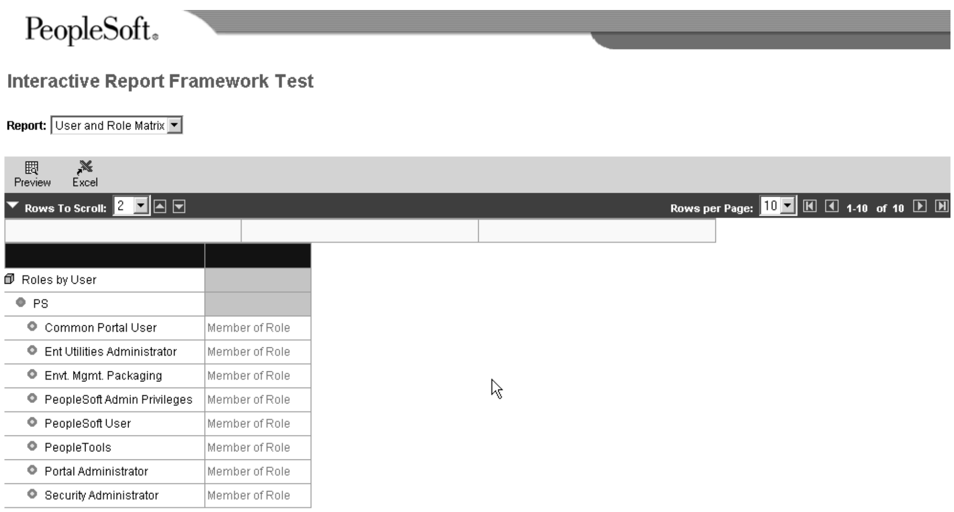
13. Click the ‘Ping Server’ button. You should receive a ‘Ping Server Succeeded’ message in the ‘Result’ field as shown below.

Validate Environment page – Ping Server Succeeded

14. Click the ‘Installation Test’ button. A secondary browser window should launch and display the following screen. The data values will change depending on the User ID you are logged in as, but the presence of this window indicates a successful installation and configuration of the Interactive Report environment.



Validate Environment page



Interactive Report Framework Test page

Task 2-4: Debug Installation Steps

To Debug the Installation:

1. Verify the spelling of file names on the Reports page
2. Verify the Server URL entry on the Servers page
3. Verify the file paths on the Servers page
4. Restart IIS on the BAM Web Server
5. Verify you have ‘Enabled Logging’ checked on the Environment Configuration page
6. Review the BAM log for details of the communication to the BAM Web Server. See the Environment Configuration step above for log information.

Troubleshooting Resources

For further troubleshooting guide on BAM - please access the Troubleshooting Guide for BAM

To access a more regularly-updated Troubleshooting Guide for PeopleSoft Business Analysis Modeler:

1. Log into My Oracle Support.
2. Select Patches and Updates
3. Select the PeopleSoft products link.
4. Click on the Apply to Release link.
5. Search for Report ID: 125202.

CHAPTER 3

INSTALLING CORRESPONDENCE MANAGEMENT FOR PEOPLESOFT ENTERPRISE CRM 8.9 APPLICATIONS

This chapter provides instructions for installing the third-party applications required for Correspondence Management functionality within PeopleSoft Enterprise CRM applications. The following installation related tasks need to be performed only when customers would like to leverage the features provided in Correspondence Management, such as generation of word documents using templates, conversion of word and text files into PDF documents, and printing of documents using network printers.

Note. We recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes this chapter's tasks.

Task No.	Task Name
Task 3-1	Identify and Configure FTP Servers
Task 3-2	Register the FTP Servers in the Correspondence Management System
Task 3-3	Install the Delivered Templates on the FTP Server
Task 3-4	Identify and Set up the Process Scheduler Server for Document Merge and Printing (Optional)

Task 3-5	Associate the Process Scheduler Server with the Document Merge Job (Optional)
Task 3-6	Associate the Process Scheduler Server with the Printing Delivery Job (Optional)
Task 3-7	Install 3rd Party Software (Optional)
Task 3-8	Configure Adobe Distiller Application (Optional)
Task 3-9	Configure Adobe Distiller Printing (Optional)
Task 3-10	Register Document Merge / Print Process Scheduler Server (Optional)
Task 3-11	Register NT printers (Optional)

Task 3-1: Identify and Configure FTP Servers

The FTP servers are used to physically store correspondence templates and finished documents. These servers are also used to store other correspondence management related documents such as intermediary XML files created by the correspondence management specific processes.

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

It is possible to use the FTP server intended for storing PeopleSoft Enterprise CRM attachments also for storing correspondence related documents. The number of documents, their size, as well as the file management plays a role in determining the need for having one or more FTP servers exclusively reserved for correspondence management.

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

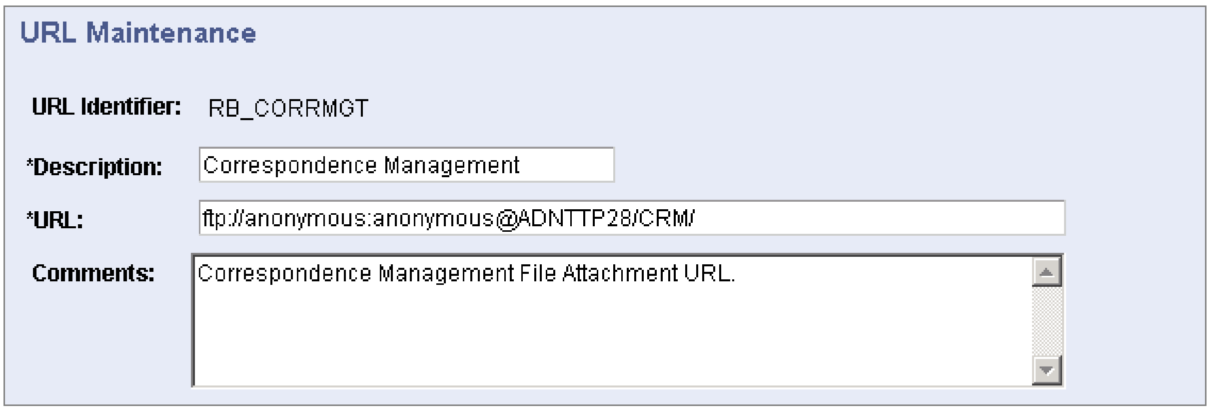
To Create the URLs for Accessing Correspondence Management Related Documents:

1. Set up one or more FTP servers for storing the Correspondence Management related documents.

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

2. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.
3. Select **PeopleTools, Utilities, Administration, URLs**.
   - The Correspondence Management module works with 5 types of documents:
     - Correspondence Templates
     - Templates personalized by the agents for a specific correspondence request
     - Intermediary XML files created by correspondence management related processes

  - Merged Documents
  - Attachments
- If all of the above-mentioned document types are stored under a single folder on a FTP server, only a single URL must be created. If these documents are stored under different folders of either a single or multiple FTP servers, then a URL must be created for each of these unique locations.
- For each unique location you plan to use, create an URL identifier and enter the URL for the FTP server the application will use to access this type of document.



URL Maintenance page

> **Note**. For more information about the URL Maintenance page, see the *PeopleTools 8.45 PeopleBook*.

Task 3-2: Register the FTP Servers in the Correspondence Management System

This process allows the customer to specify what URL needs to be used by the Correspondence Management system for accessing the various types of documents. URL identifiers can be assigned to following categories:

- Template Files
- Personalized Templates
- Recipient XML
- Recipient Document
- Attachment

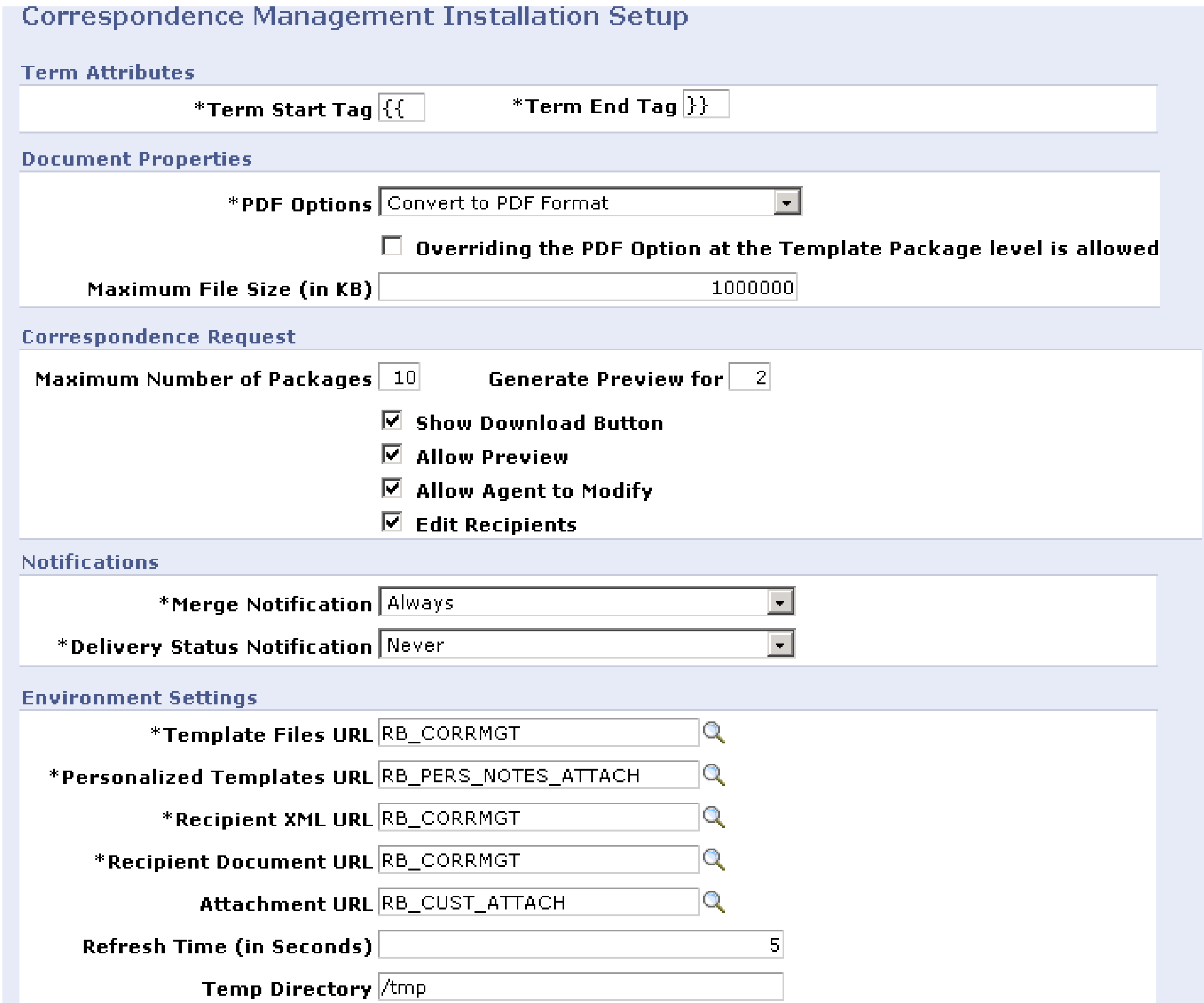
To Register the FTP Server for the Correspondence Management System:

1. Select **PeopleTools, Utilities, Administration, URLs** to define the URL. The system data for the URL is RB_CORRMGT.

2. Select **Set Up CRM, Common Definitions, Correspondence, Install Options** to configure the correspondence management system installation.

3. Set environment settings as follows:

Field	Value
Template File URL	RB_CORRMGT
Personalized Template URL	RB_CORRMGT
Recipient XML URL	RB_CORRMGT
Recipient Doc URL	RB_CORRMGT
Attachment URL	RB_CORRMGT



Correspondence Management Installation Setup page

Note. For more information, see *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook;* "Defining Settings for Template-Based Correspondence".

Task 3-3: Install the Delivered Templates on the FTP Server

This task must be performed in order to copy the system delivered correspondence template files to the appropriate location in the FTP server. The location is identified by retrieving the URL for the URL identifier specified for '***Template Files URL'*** under Environment Settings. Hence, ensure that FTP server has been configured and registered in the correspondence management system prior to performing this task.

Note. Please refer to Task 3-1 and Task 3-2 in this chapter for more information.

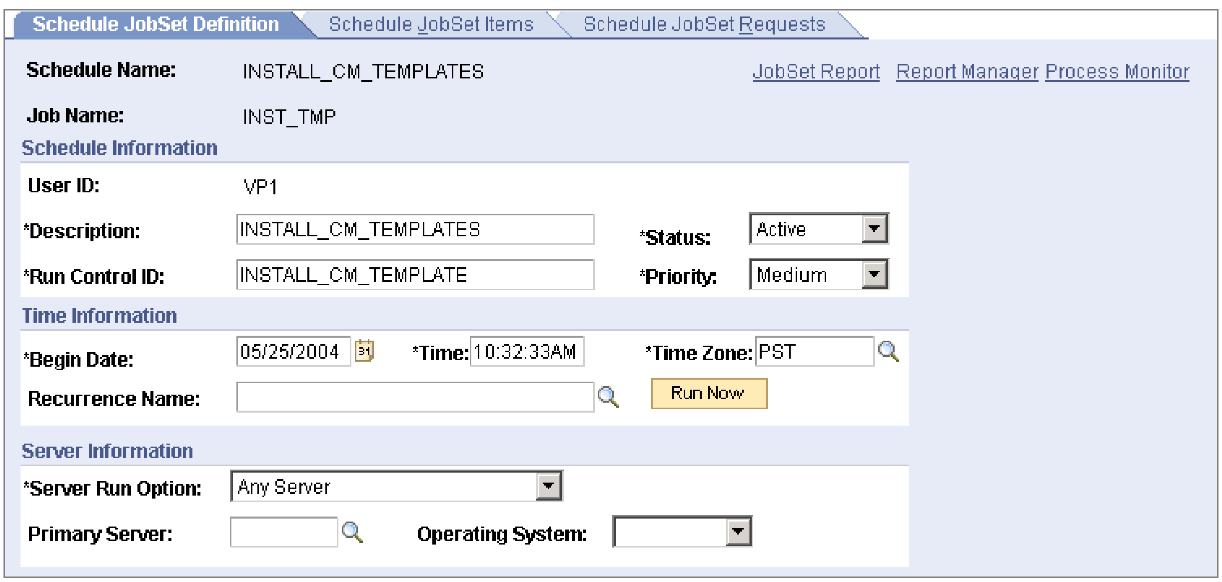
Additionally, a Jobset definition must be created to run the '***INST_TMP'*** job. The responsibility of the job is to copy the template files in the FTP server directory. The ***'INST_TMP'*** job definition is available as part of the application.

To Install the Delivered Templates on the FTP Server:

1. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.

2. Select **PeopleTools, Process Scheduler, Schedule Jobset Definitions**.

3. Create a new Jobset Definition called 'INSTALL_CM_TEMPLATES' to run the job 'INST_TMP'.



Schedule JobSet Definition page

4. Be sure to set the Status field to "Active" and select the correct Run Control ID.

5. Click Save.

6. Click the Run Now button to proceed.

7. Ensure that the files have been copied successfully by examining the message log.

8. Select **PeopleTools, Process Scheduler**, **Process Monitor.**

9. Click "INST_TMP" under the Process Name Column.

10. Select INSTALL_TEMP Success, Message Log to validate that the process completed successfully.

The following screenshot provides a sample view of the message log.

Message Log

Process

Instance: 6438 **Type:** Application Engine

Name: INSTALL_TEMP **Description:**

Customize | Find | View All | First 1-10 of 10 Last

Severity	Log Time	Message Text	Explain
10	4:01:40PM	File ID: CASE STATUS Name: Case_Status.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:01:43PM	File ID: CASE STATUS EXTENSION Name: Case_Status_Extended_Version_7.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:01:46PM	File ID: GENERIC INTRODUCTION Name: generic_introduction.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:01:49PM	File ID: JOB PROMOTION CONGRADULATION Name: Job_Promotion_Congratulatory_Template.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:01:52PM	File ID: ORDER CONFIRMATION Name: orderConfirm.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:01:55PM	File ID: ORDER MAINTAINENCE Name: OrderMaint.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:01:59PM	File ID: QUOTE Name: Quote.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain
10	4:02:02PM	File ID: QUOTE CONFIRMATION Name: Quote_Confirmation.dot Success: Y Status:FTP Server: ftp://anonymous:anonymous@216.131.217.215/crm/	Explain

Message Log page

Note. For more information about the Schedule Jobset Definitions Maintenance page, refer to the *PeopleTools 8.45 PeopleBook*.

Task 3-4: Identify and Set up the Process Scheduler Server for Document Merge and Printing (Optional)

This is an optional installation task.

PeopleSoft uses the several jobs to run correspondence-related PeopleSoft Application Engine processes. The processes, in turn, call the external scripts to perform certain processes.

The following table lists the correspondence management jobs:

Job Name	Processes	Actions Performed
Data Extraction (EXTRDATA)	RBC_GENDATA	Data extraction.
Merge (MERGEDOC)	RBC_MERGEDOC	Document merging and PDF conversion.
Email Delivery (DELVUNIX)	RBC_DELIVER	Delivery of email correspondence.
Print Delivery (DELV_NT)	RBC_DELIVER	Delivery of print correspondence.

Important! Do not change the names of these jobs.

The Data Extraction job and Email Delivery job can run on any process scheduler server and under any operating system. The Merge job and Print Delivery job can run only on Windows NT servers.

The Process Scheduler servers that run the Merge and Print Delivery jobs must have the appropriate third-party software and PeopleSoft scripts installed. This is explained at length in the subsequent sections.

Be sure to identify the server where correspondence management merge processing and printing can occur. Using PSADMIN.EXE, the process scheduler server definition will be completed. In addition, the servers that run either the Merge or Print Delivery job must be registered in the Merge Server component within PeopleSoft Enterprise CRM.

Failure to register the Process Scheduler servers that run the Merge or Print Delivery job will cause errors during correspondence processing. The registration of the process scheduler server intended to run merge or print delivery job in PeopleSoft Enterprise CRM will be discussed in the subsequent sections.

This server will also be specified in the correspondence management related jobs – ***MERGEDOC & DELV_NT.***

- The job ***MERGEDOC*** is responsible for generating the word document using the word template. It is also responsible for converting the documents to PDF format.
- The job ***DELV_NT*** is responsible for printing the documents using NT printers.

It is not mandatory that both the jobs run on the same machine. Creation of the process scheduler server definition and the associated steps must be performed for every server that is allocated for executing either ***MERGEDOC*** or ***DELV_NT.***

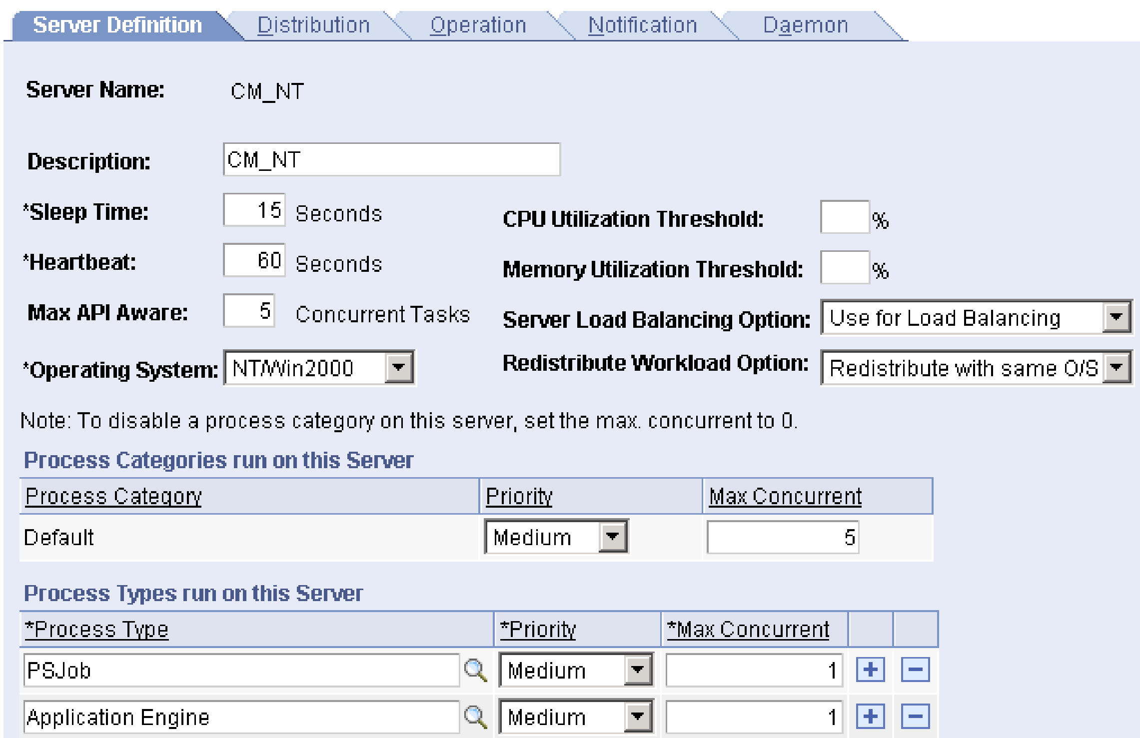
> **Note**. See the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook; Defining Settings for Template-based Correspondence*, "Defining Merge Servers and Printers" for more information on how to configure the system to distribute the jobs across multiple machines.

To Set Up the Process Scheduler Server for Document Merge and Printing:

Use standard PeopleSoft Process Scheduler functionality to set up servers, associate these jobs with the servers, and implement load balancing.

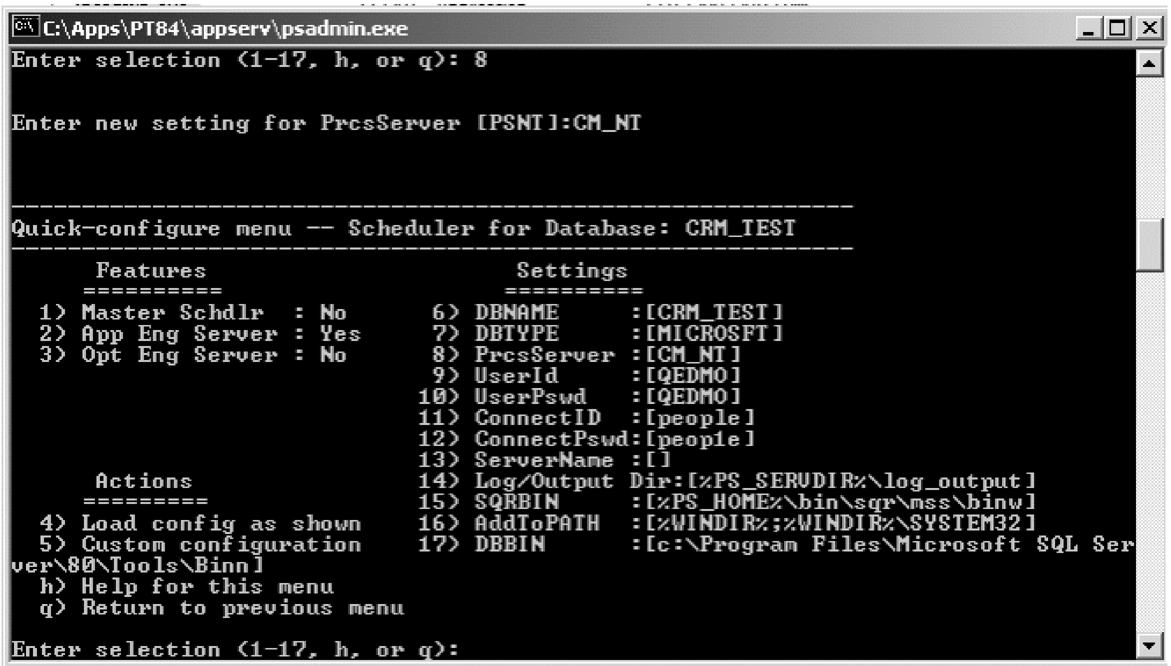
1. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.

2. Select **PeopleTools, Process Scheduler, Servers** to create a new Server Definition.



Server Definition page

3. Configure the Process Scheduler. The process scheduler server must be configured using PSADMIN.EXE.



PSADMIN.EXE screen

Task 3-5: Associate the Process Scheduler Server with the Document Merge Job (Optional)

This is an optional installation task.

As mentioned in the previous task, the job definition of the job ***MERGEDOC*** must be edited to specify the process scheduler server on which this job must be run.

1. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.

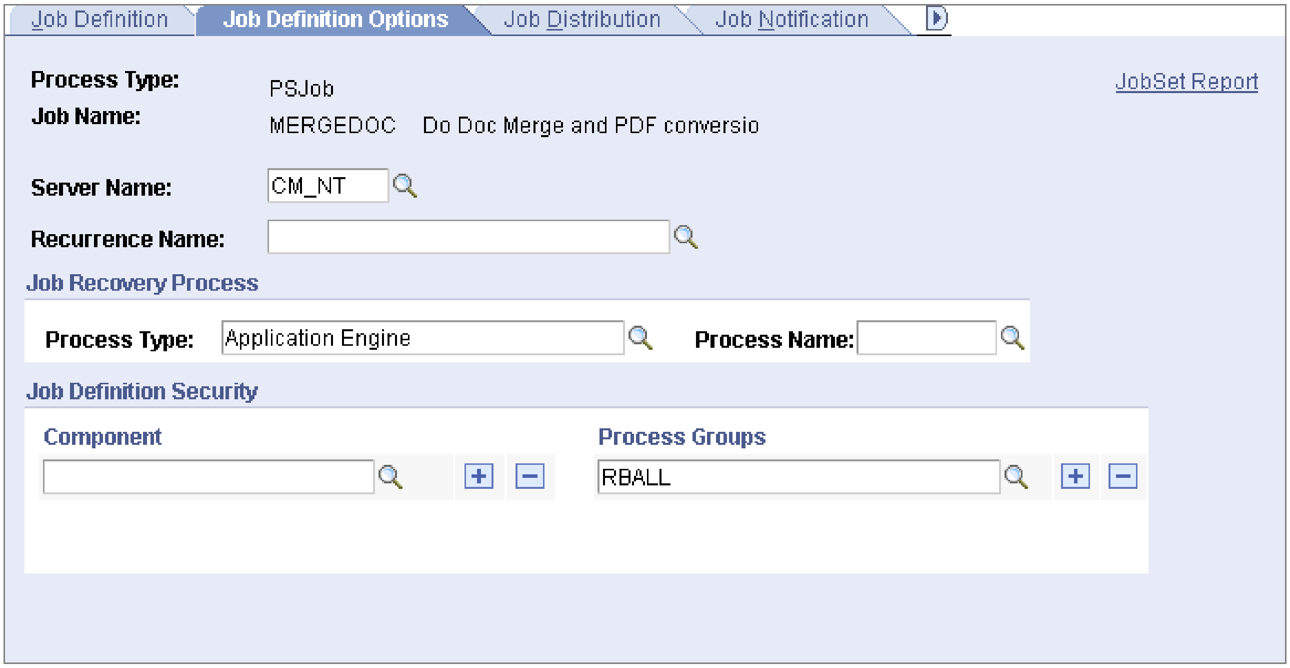
2. Select PeopleTools, Process Scheduler, Jobs.

3. Select the job definition MERGEDOC.

4. Specify the correct server name. (For example: CM_NT) and accept the default values for all other fields on the page.

5. Save the changes.

> **Note**. If you need to customize the job definition, see the *PeopleSoft Process Scheduler PeopleBook, Defining Jobs and JobSets* for more information.



Job DefinitionOptions page

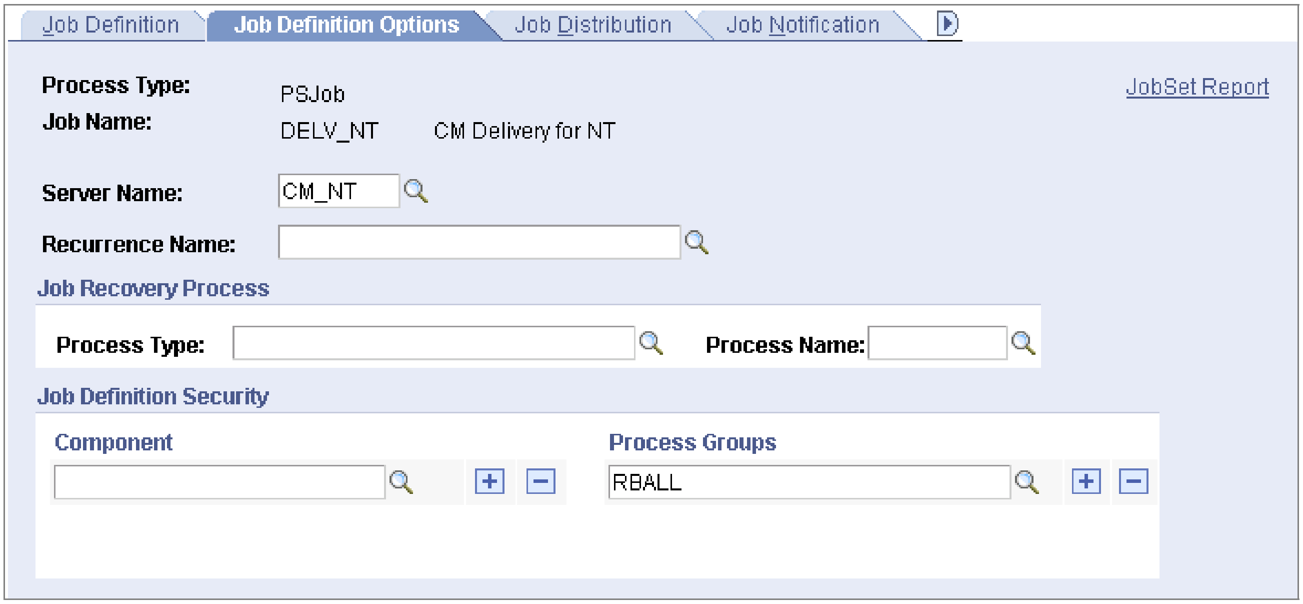
Task 3-6: Associate the Process Scheduler Server with the Printing Delivery Job (Optional)

This is an optional installation task.

As mentioned in the previous task, the job definition of the job ***DELV_NT*** must be edited to specify the process scheduler server on which this job must be run.

1. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.
2. Select **PeopleTools, Process Scheduler, Jobs**.
3. Select the job definition DELV_NT.
4. Specify the correct server name. (For example: CM_NT) and accept the default values for all other fields on the page.
5. Save the changes.

> **Note**. If you need to customize the job definition, see *PeopleSoft Process Scheduler PeopleBook, Defining Jobs and JobSets* for more information.



Job Definition Options page

Task 3-7: Install 3rd Party Software (Optional)

This is an optional installation task.

The process scheduler servers, which are intended to perform, merge processing or printing should have the following 3rd party software installed. The software are listed as follows:

- Windows Operating System

  Windows 2000 operating system is preferred. For the Windows NT operating system, please be sure to apply Service Package 6.0a

- Install Windows Script Host (WSH 5.5 or 5.6)

  The Windows Script Host is the Microsoft script engine that provides the environment where Jscript and VBScript can run. Installing WSH5.5 or WSH5.6 will automatically include Jscript Engine and VBScript Engine, its runtime library. Windows 2000 ships with WSH5.1 however, we recommend WSH5.6 due to the new security model.

> **Note.** WSH 5.5. OR 5.6 is available for installation on the Microsoft MSDN official website.

- Install Microsoft Word 2000

  The CM system executes VBScript in batch mode to process document template merging with PeopleSoft Enterprise CRM data. OLE Automation Object (Word) will be called to do this document merging. Hence, the installation of Microsoft Word 2000 is required.

- Install Adobe Acrobat 5.0 Software (Optional)

  Install Adobe Acrobat 5. 0 software (full version). Installation of this software is needed only if there is a need either to distribute the documents in PDF document or to print PDF documents.

  When installing Adobe Acrobat 5.0 Software, you must make sure that the Adobe Distiller Package that comes with this software is also installed. Adobe Distiller is used by Correspondence Management to convert the document into postscript file format before converting it into a PDF file.

> **Note.** You may select a different PDF vendor, however you will have to customize the PSFT_ADOBE_PDF.vbs file.

- Install Microsoft XML Parser 4.0 or Higher

The Correspondence Management system utilizes Microsoft XML Parser to do data extraction and data merging. The XML Data is the communication channel between the PeopleSoft application and VBScript Application that is shipped with the PeopleSoft Enterprise CRM system. Therefore it must be installed.

Installation of the XML Parser eliminates the need to install Internet Explorer on the server side.

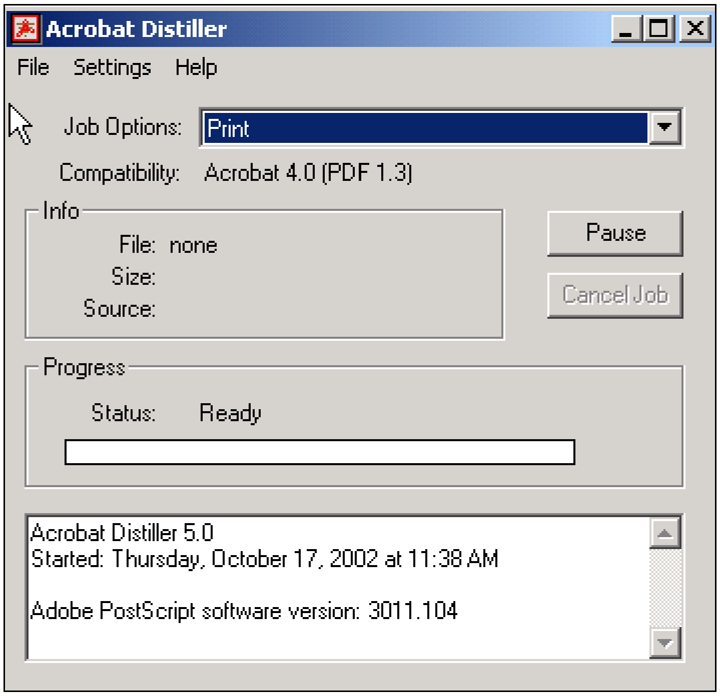
> **Note.** The XML Parser is available for installation on the Microsoft MSDN official web site.

Task 3-8: Configure Adobe Distiller Application (Optional)

To Configure the Adobe Distiller application:

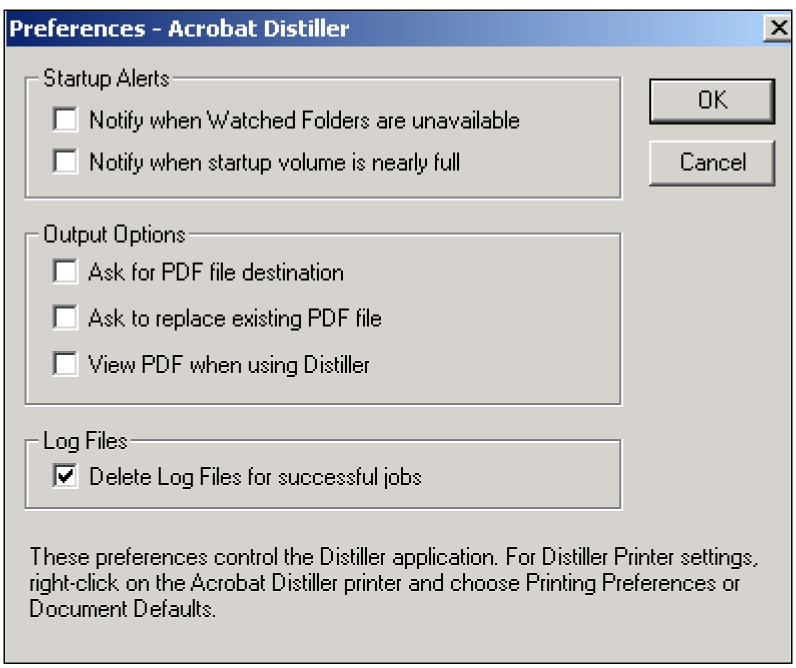
This is an optional installation task.

1. Run the Adobe Distiller from Windows.



Acrobat Distiller page

2. Select **File, Preferences**. Select Delete Log Files for successful jobs and click OK.



Acrobat Distiller Preferences page

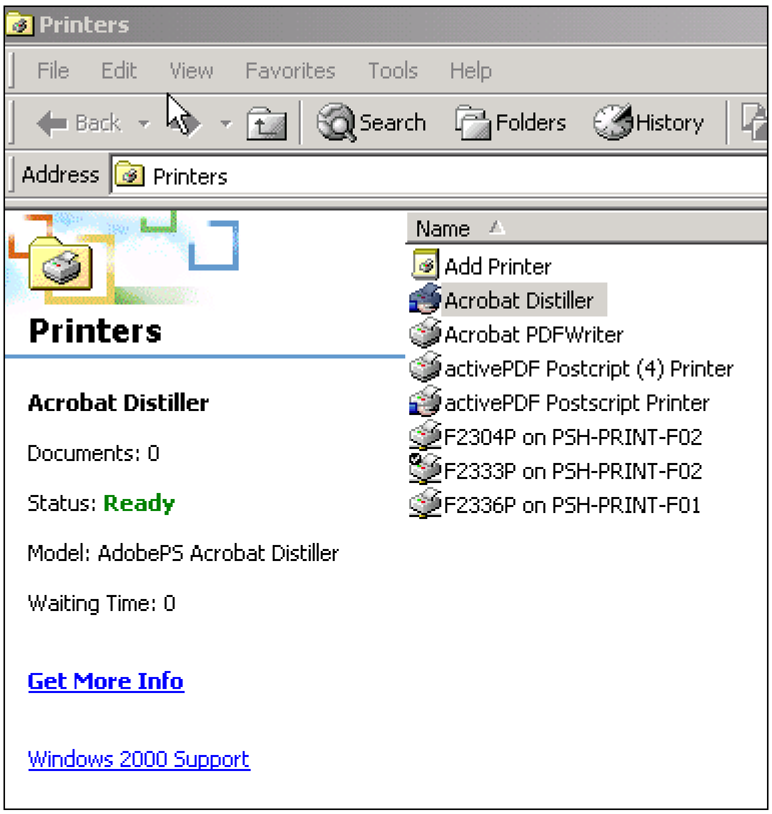
Task 3-9: Configure Adobe Distiller Printing (Optional)

This is an optional installation task.

To Configure Adobe Distiller Printing:

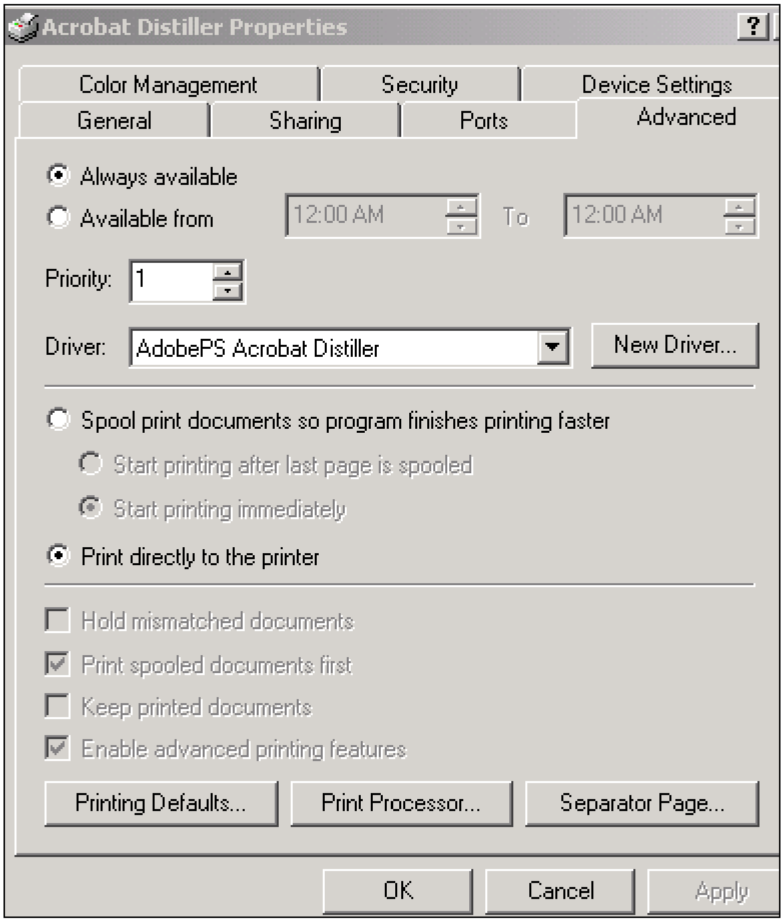
1. Select **Window Printer Explorer, Printers**.

2. Right click Acrobat Distiller and select Property.



Printers page

3. In the Acrobat Distiller Properties dialog window, go to the Advanced tab to make sure the radio buttons are selected as shown below.



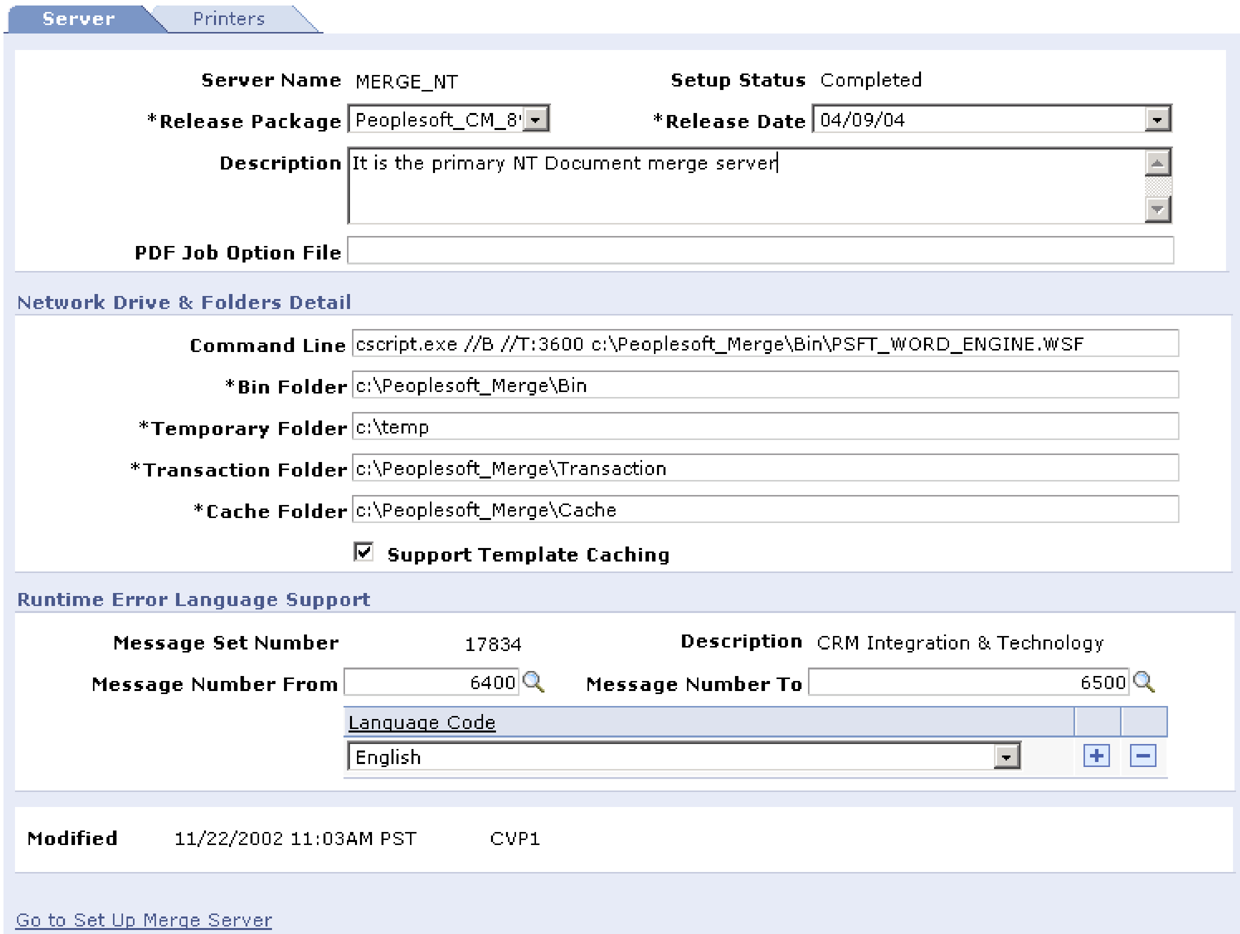
Acrobat Distiller Advanced Properties page

Task 3-10: Register Document Merge / Print Process Scheduler Server (Optional)

This is an optional installation task.

As mentioned in Task 3-4, each of the process scheduler servers that are intended to run either merge or printing specific jobs should be registered in Merge Server component in PeopleSoft CRM. In addition, the registration folders must be verified on relevant machines.

The server definition for correspondence management merge processing is CM_NT. Select **Set Up CRM, Common Definitions, Correspondence, Merge Server** to define CM_NT.



Merge Server page

Note. The Correspondence Management system is template based and if your system does not support a printing channel, then it is not necessary to define the merge server.

Install CM Document Merge Script software (The current release is VBScript)

Before installing this software, make sure that the Merge NT Scheduler Agent is running on the network. Select **Set Up CRM, Common Definitions, Correspondence, Merge Server** to create the CM_NT scheduler server definition.

Important! If you define a new merge NT process scheduler agent, you must click the Add a New Value hyperlink, select the new NT agent server name, and click Add.

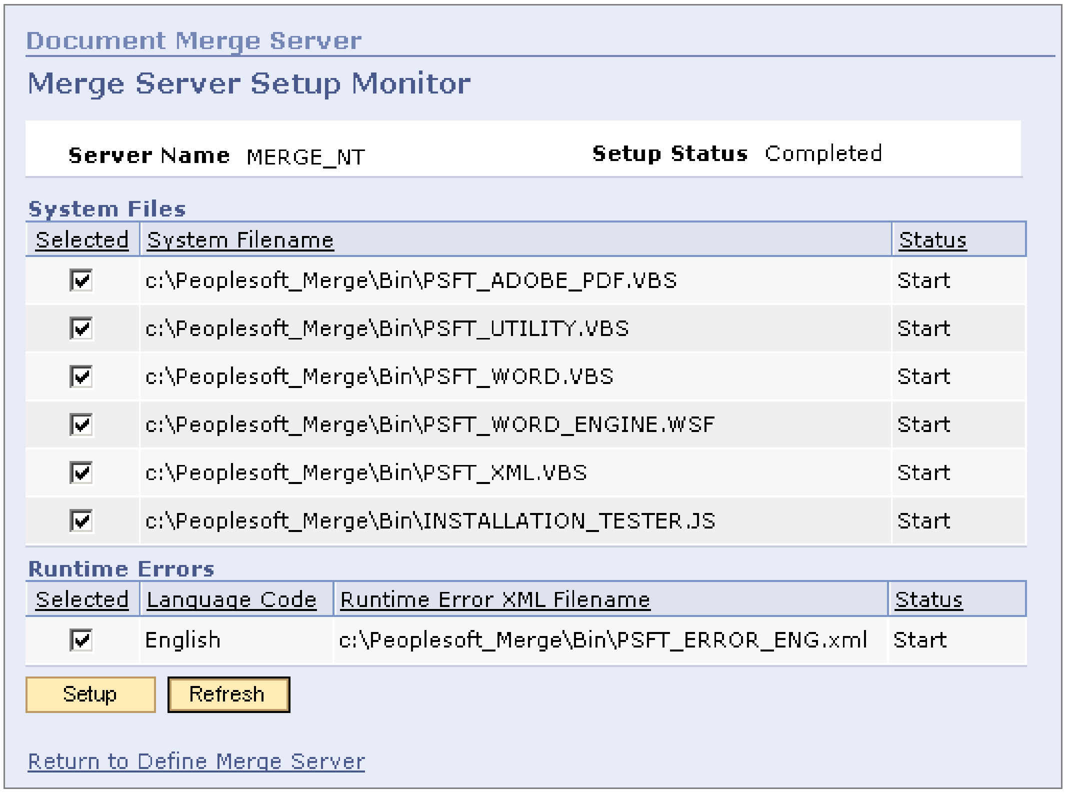
You may change the default the values for folders. Make sure that the folders specified exist in the machine. Select the software release package that needs to be electronically installed in the machine.

Installation of the correspondence management related software must be completed prior to using the services of the machine for document generation as well as for delivery.

To Configure the Merge Server:

1. Select **Set Up CRM, Common Definitions, Correspondence, Merge Server**

2. Click the Go to Set Up Merge Server link.



Merge Server Setup Monitor page

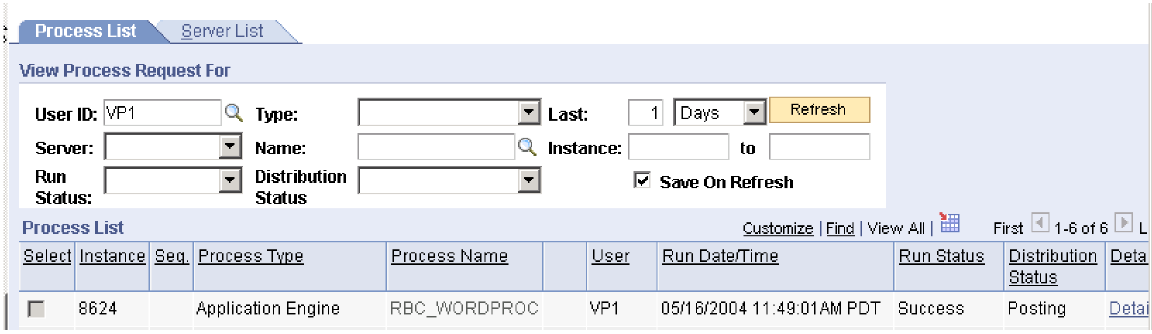
3. Click the Setup button. It will trigger AE process "RBC_WORDPROC".

To Verify that the AE process "RBC_WORDPROC" Runs Successfully:

1. Select Process Scheduler.

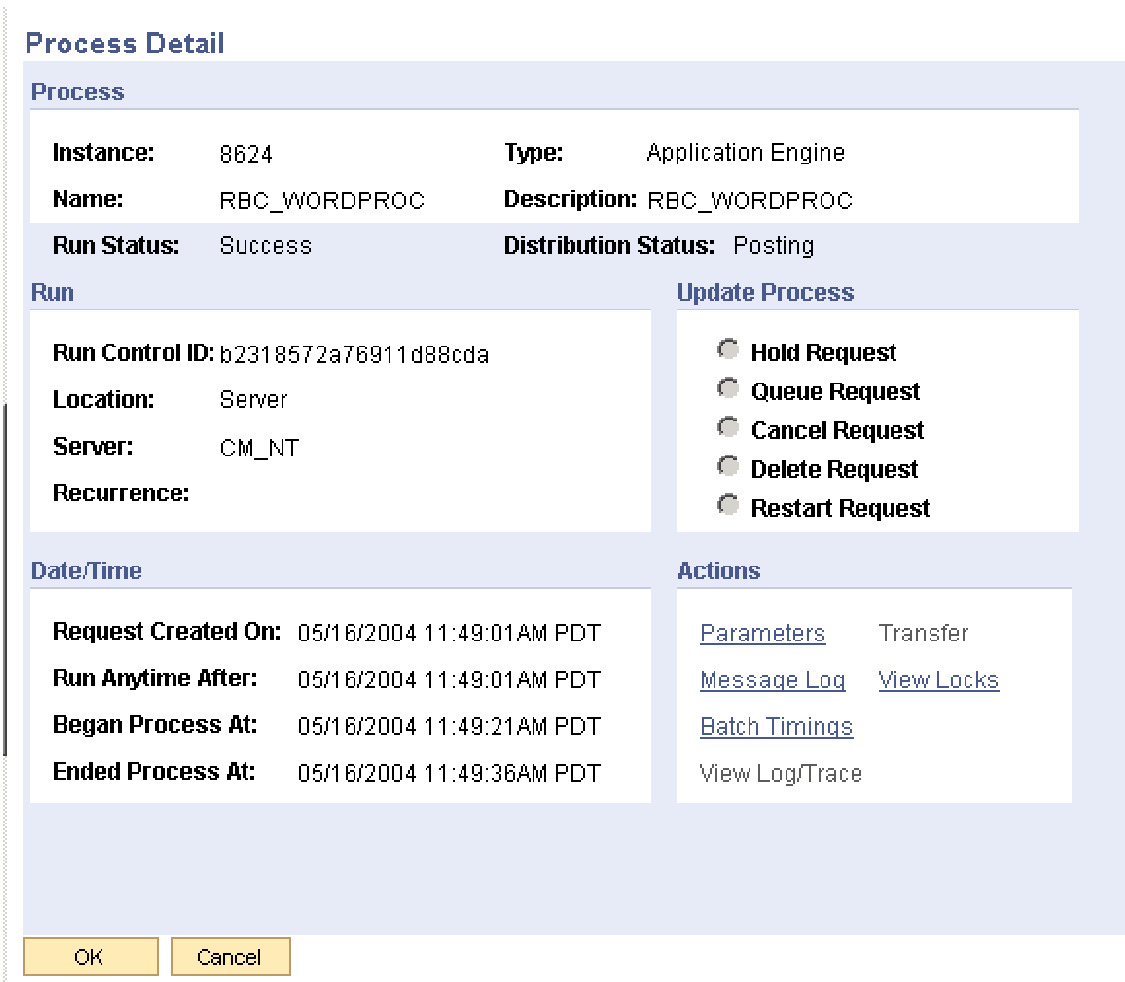
2. Click Process Monitor.

3. A status of Success indicates that the process has finished.



Process List page

4. Select the Details link to make sure the AE process ran successfully in the target merge NT scheduler agent.



Process Detail page

> **Note**. For more information see *PeopleSoft CRM 8.45 Automation and Configuration Tools PeopleBook*; ‘Defining Settings for Template-based Correspondence’.

Task 3-11: Register NT printers (Optional)

This is an optional installation task.

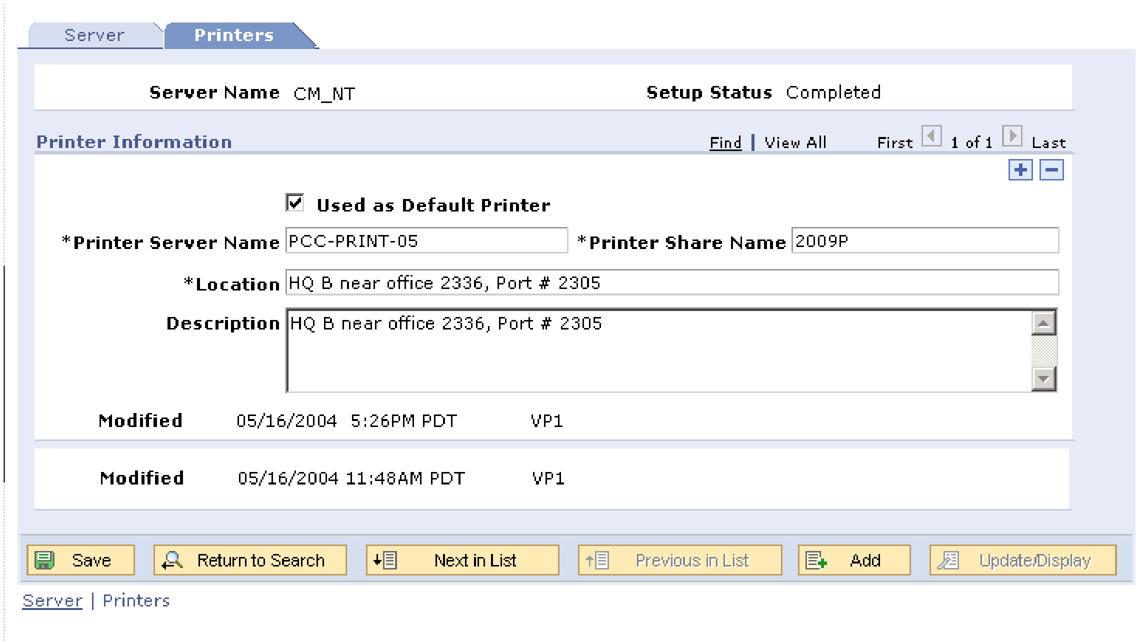
By associating printers with your server definitions, you create a list of printers that are available for selection in the Create Correspondence page. The user's printer selection then determines where the delivery process run.

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

> **Note.** The user's printer selection and the association between the printer and the Process Scheduler server controls where the Print Delivery job runs. Therefore, do not explicitly assign the Print Delivery job to a specific Process Scheduler server.

To Register NT Printers:

1. Select **Set Up CRM, Common Definitions, Correspondence, Merge Server**.
2. Click the Printers tab.
3. Specify printer information.
4. Click Save.



Merge Server Printers page

> **Note.** Make sure that the printers listed on this page are mapped to the process scheduler server machine, which is used as the merge server, and can print for that machine.

CHAPTER 4

INSTALLING PEOPLESOFT ENTERPRISE ONLINE MARKETING 8.9

This chapter reviews minimum hardware and software requirements and provides instructions for the installation and the set up of Oracle's PeopleSoft Enterprise CRM 8.9 Online Marketing (OLM) server and related components.

Note. Consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on My Oracle Support website to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

PeopleSoft OLM Hardware and Software Requirements

This section describes the minimum recommended machine configuration for Oracle's PeopleSoft Enterprise Online Marketing (OLM) server components. Take into consideration other software that may also have recommended configuration requirements.

These requirements are for the PeopleSoft OLM machines only; separate requirements for the various PeopleSoft CRM components are not listed here. Install and configure the PeopleSoft CRM core components before you begin your installation of PeopleSoft OLM.

The following requirements assume one component per machine. For multiple components, add the individual requirements.

Component	Requirements
Dialog Execution Server (DES)	• Pentium 233 MHz processor (minimum) • 512 MB of memory (RAM) • 400 MB of available hard disk space

Component	Requirements
	• Allocate 2 to 5 times CPU memory for swap space
Mailcaster	• Pentium 233 MHz processor (minimum) • 256 MB of memory (RAM) • 100 MB of available hard disk space
Watchdog	• Pentium 233 MHz processor (minimum) • 16 MB of memory (RAM) • 50 MB of available hard disk space
Email Response Processor (ERP)	• Pentium 233 MHz processor (minimum) • 32 MB of memory (RAM) • 100 MB of available hard disk space

Note. Ensure that you have updated to the latest Sun Solaris or IBM AIX patch level for your release of the operating system. This is not supported on HP UNIX.

Software Requirements

These are the certified additional components and PeopleSoft OLM component products for Sun Solaris, IBM AIX and Microsoft Windows 2000.

Note. PeopleSoft OLM is not supported on HP UNIX.

Note. Additional components are supported on the operating system releases recommended by their respective companies. If your installation configuration differs from the recommended PeopleSoft certified platforms and you encounter problems that could be the cause of software incompatibility, PeopleSoft Enterprise Online Marketing technical support may recommend that you reconfigure your system to meet PeopleSoft certifications.

The following operating systems and additional component software are recommended:

Component	Requirements
Client Drivers	• Oracle9*i*™ 9.2.0.4 – Oracle Type 4 JDBC driver for JDK 1.4: ojdbc14.jar • MSSQL – Microsoft SQL Server 2005 JDBC Driver : sqljdbc.jar • IBM DB2 UDB: IBM’s Type 4 JDBC driver: db2jcc.jar, db2jcc_license_cu.jar and

Component	Requirements
	db2jcc_license_cisuz.jar

Outbound Email Processor	• PeopleSoft CRM 8.9
	• SMTP compliant email server:
	  • LSoft - LSMTP
	  • Ironport

Web Browser	• Microsoft Internet Explorer 5.5 SP2 & 6.0 • Netscape Navigator 7
Dialog Execution Server (DES)	• PeopleSoft CRM 8.9 • BEA WebLogic 8.1SP3 • IBM WebSphere 5.1
Watchdog	• PeopleSoft CRM 8.9

Note. For BEA WebLogic only, a proxy server is required when the web server is running behind a firewall that does not allow for outbound HTTP requests.

Note. PeopleSoft OLM does not run on all hardware and software platforms supported by PeopleSoft PeopleTools. You must ensure that you have compatible hardware and software by reviewing the PeopleSoft CRM 8.9 Hardware and Software guide, available on My Oracle Support website. The preceding *PeopleSoft OLM Hardware and Software Requirements* section details hardware and software that is specific to PeopleSoft OLM and related components.

Note. Microsoft Server 2003 and SQL Server 2005 are supported versions for CRM OLM 8.9. Support was added with PeopleTools 8.48 or higher and ICE Enhancement Request ID 1575708000, that was delivered in CRM 8.9 Bundle #23.

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

Task Overview

The following table summarizes the tasks in this chapter:

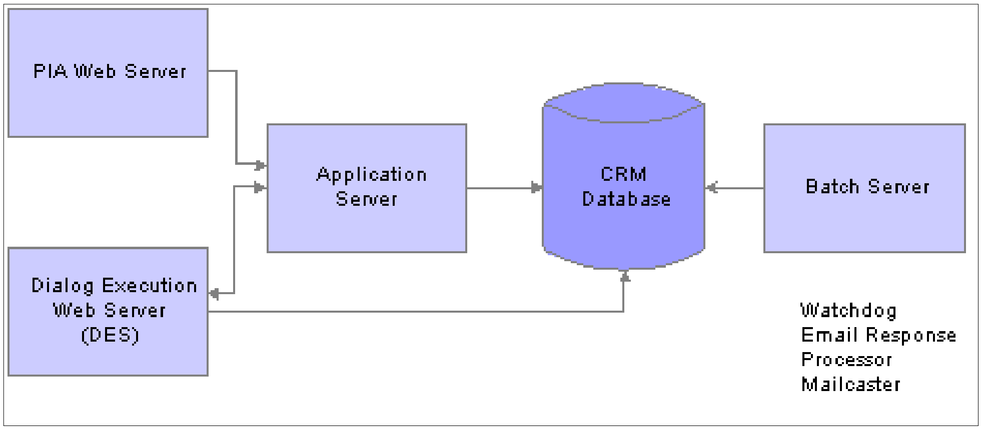
Task No.	Task Name
Task 4-1:	Modifying the Dialog Execution Deployment Descriptor
Task 4-2:	Installing the Dialog Execution Server Components
Task 4-3	Configuring Integration Messaging
Task 4-4	Configuring the PeopleSoft OLM System Parameters
Task 4-5	Setting Up the FTP Server URL for File Upload
Task 4-6	Setting Up the Web Profile to Bypass the Sign In Page
Task 4-7	Assigning Self Service Permissions to PeopleSoft OLM Users
Task 4-8	Setting Up the PSFT_OLM Node
Task 4-9	Assigning the Process Scheduler Administrator to the User
Task 4-10	Retrieving and Installing the JDBC Drivers
Task 4-11	Installing the Dialog Execution Server on an IBM WebSphere Server
Task 4-12	Installing the Dialog Execution Server on a BEA WebLogic Server
Task 4-13	Testing the Dialog Execution Server Installation
Task 4-14	Testing the Email Server
Task 4-15	Adding Stand Alone Dialog Servers Such as Mailcaster, ERP, and Watchdog (Optional)
Task 4-16	Setting Up User Installation of the Adobe SVG Plug-In

Understanding the PeopleSoft OLM 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.** Consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on My Oracle Support website to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

The following diagram shows the PeopleSoft Enterprise CRM OLM architecture:



PeopleSoft Enterprise Online Marketing Architecture

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

To install the PeopleSoft CRM OLM system:

1. Install the database (such as Oracle9*i*).

2. Install and configure the PeopleSoft Enterprise CRM 8.9 database and software (PeopleSoft Application Designer, BEA 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 (Dialog Execution Server, Mailcaster, Email Response Processor, and so on).

See Appendix: “Reviewing Tablespaces and Parameters for PeopleSoft Online Marketing.”

Prerequisites

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

- You have the PeopleSoft Enterprise CRM 8.9 CD.
- Your PeopleSoft CRM environment is fully functional, with the PeopleSoft Application server, BEA Tuxedo, and at least one Tuxedo Batch server installed.
- Oracle’s PeopleSoft Pure Internet Architecture web server is installed.
- The JOLT publish/subscribe servers are configured for your application server.

- The Process Scheduler server is installed.
- The Dialog administrator *Dialog Administrator* and Process Scheduler administrator *ProcessSchedulerAdmin* roles are assigned to your Administrator user ID.
- You have the correct configuration and kernel settings on UNIX.

> **Note.** Before making these changes, consult 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
```

Task 4-1: Modifying the Dialog Execution Server Deployment Descriptor

Before you install the Dialog Execution Server (DES) application, you must go to My Oracle Support website to access *Bundle 29 for PeopleSoft Enterprise CRM 8.9*, and then do one of the following:

- If you are using PeopleTools 8.48 or earlier, you must retrieve and apply *Bundle 2*, for PeopleSoft CRM 8.9, to automatically update the DES deployment descriptor. No further action or modification is required.
- If you are using PeopleTools 8.49 or later, you must manually modify the DES application.xml file before you install the DES, to avoid DES installation failure.

This is an example of the application.xml that works with PeopleSoft PeopleTools 8.48.

If the file is in PeopleSoft PeopleTools 8.48 format, it should appear as shown here:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE application PUBLIC "-//Sun Microsystems, Inc.//DTD J2EE Application
1.3//EN" "http://java.sun.com/dtd/application_1_3.dtd">
<application id="Application_ID">
<display-name>crm890</display-name>
<module id="WebModule_1077315443227">
<web>
<web-uri>com.peoplesoft.crm.omk.war</web-uri>
<context-root>/DCS</context-root>
</web>
</module>
</application>
```

The following instructions describe how to *manually* modify the application.xml file.

To manually modify the application.xml file when using PeopleSoft PeopleTools 8.49 or later:

1. In general, when you extract the application.xml file, a folder by name Meta-inf will be automatically created in your C drive and the file will automatically be extracted to C:\META-INF.

2. Extract the application.xml file from the crm_omk_wl.ear file (using your WinZip or tar utility).

   The crm_omk_wl.ear file is located at: PS_HOME\setup\mpwebappdeploy\archives

3. After you extract the file, check the properties of the extracted application.xml file to verify that the **read only** check box is clear.

4. Open the application.xml file with a text editor.

5. Comment the following line:

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

6. Add the following lines:

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

7. Add the display name as crm9 instead of crm890

   - Prior to modification:

```
<display-name>crm890</display-name>
```

   - Post modification

```
<display-name>crm9</display-name>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>

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

<!-- ************************************************************ -->

<!--       Confidentiality Information:                           -->
```



```
<!--                                                              -->
<!-- This module contains confidential and proprietary information -->
<!-- of Oracle; it is not to be copied, reproduced, or transmitted -->
<!-- in any form, by any means, in whole or in part, nor is it to  -->
<!-- be used for any purpose other than that for which it is       -->
<!-- expressly provided under the applicable license agreement.    -->
<!--                                                              -->
<!-- Copyright (C) 2007 Oracle. All Rights Reserved.              -->
<!-- ************************************************************* -->
<application id="Application_ID" version="1.4"
              xmlns="http://java.sun.com/xml/ns/j2ee"
             xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
             xsi:schemaLocation="http://java.sun.com/xml/ns/j2ee
              http://java.sun.com/xml/ns/j2ee/application_1_4.xsd">

       <display-name>crm9</display-name>
       <module id="WebModule_1077315443227">
              <web>
                     <web-uri>com.peoplesoft.crm.omk.war</web-uri>
                     <context-root>/DCS</context-root>
              </web>
       </module>
</application>
```

8. Save the file and add this file back to the **crm_omk_wl.ear** file.

> **Note.** Ensure that you note the path of the application.xml file while you are opening it with WinZip. The path should be meta-inf.

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

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

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

    The ear file is not yet ready for use until changes are made for the weblogic.xml file.

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

- For Oracle Application Server (OAS):

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

- For IBM WebSphere:

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

- For BEA WebLogic:

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

> **Note.** Specific to the July 2007 update, if you are using PeopleSoft PeopleTools 8.48 or earlier, the corresponding bundle provides an automatic update. No further action is required.

Task 4-2: Installing the Dialog Execution Server Components

> ***Important!*** Before you begin your installation of the Dialog Execution Server and related components, refer to the previous task *"Modifying the Dialog Execution Server Deployment Descriptor"* to determine if you must manually update the DES deployment descriptor before proceeding with your installation of the DES.

To install the Dialog Execution Server on Sun Solaris, IBM AIX, or Microsoft Windows 2000, ensure that you have the following:

- A fully installed PeopleSoft Enterprise CRM Pure Internet Architecture environment including a PeopleSoft Pure Internet Architecture web server, BEA Tuxedo, and at least one Tuxedo Batch server.

- An additional BEA WebLogic or IBM WebSphere web server installed for the Dialog Execution Server.

> **Note.** The Dialog Execution Server installs from the PS_HOME/setup/mpwebappdeploy directory after the PeopleSoft Enterprise CRM installation is complete.

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

> **Note.** Any existing PeopleSoft Pure Internet Architecture domain on a BEA WebLogic or IMB WebSphere server cannot be used for the Dialog Execution Server. A newly created IBM WebSphere server is required and must be created prior to running the webappdeploy setup. This should be done through the IBM WebSphere administrative console. For the Dialog Execution Server running on a BEA WebLogic server, the new domain is created by running the webappdeploy setup.

Task 4-3: Configuring Integration Messaging

To configure integration messaging:

1. Run the PeopleSoft Data Mover utility **psdmt.exe**.

   This brings you to the PeopleSoft PeopleTools Sign on page:

2. Enter the user ID and password.

3. Run the **omkpostconfigstatic.dms** Data Mover script to configure PeopleSoft Integration Broker messaging.

Task 4-4: Configuring the PeopleSoft OLM System Parameters

This task describes the parameters used by the Dialog Execution Server and Mailcaster. The parameters described here must be set before the PeopleSoft OLM servers are installed.

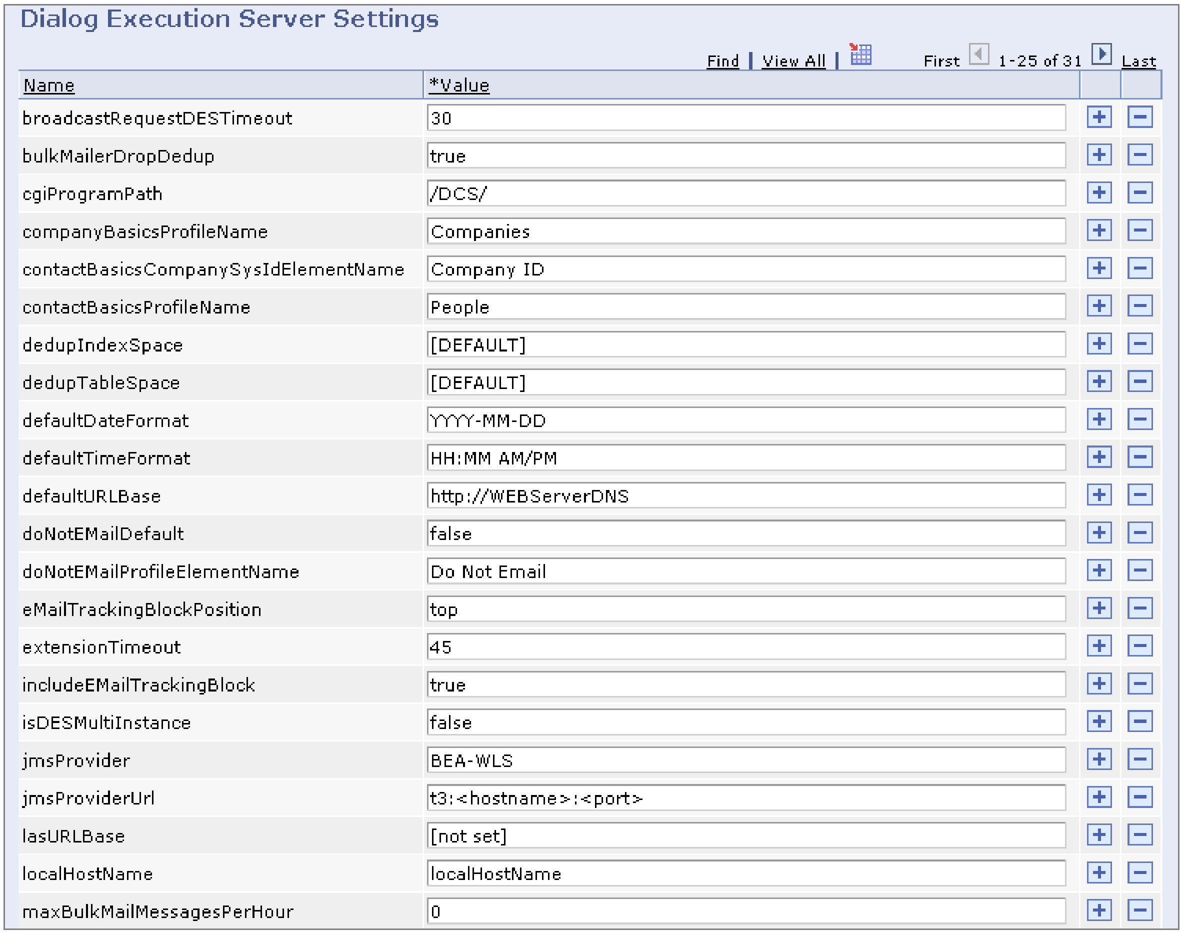
> **Note.** The Parameters used by the WatchDog and Email Response Processors are described in the *PeopleSoft Enterprise Online Marketing 8.9 Administration Guide*.

Define the following variables on the Settings page before you install the PeopleSoft Enterprise Online Marketing servers (more details on definitions to follow).

To set parameter values:

1. Select **Set Up CRM, Product Related, Online Marketing, Settings** to add the variables if they are not already present.

   The Dialog Execution Server Settings page appears:



Dialog Execution Server Settings

Find | View All | First 1-25 of 31 Last

Name	*Value
broadcastRequestDESTimeout	30
bulkMailerDropDedup	true
cgiProgramPath	/DCS/
companyBasicsProfileName	Companies
contactBasicsCompanySysIdElementName	Company ID
contactBasicsProfileName	People
dedupIndexSpace	[DEFAULT]
dedupTableSpace	[DEFAULT]
defaultDateFormat	YYYY-MM-DD
defaultTimeFormat	HH:MM AM/PM
defaultURLBase	http://WEBServerDNS
doNotEMailDefault	false
doNotEMailProfileElementName	Do Not Email
eMailTrackingBlockPosition	top
extensionTimeout	45
includeEMailTrackingBlock	true
isDESMultiInstance	false
jmsProvider	BEA-WLS
jmsProviderUrl	t3:<hostname>:<port>
lasURLBase	[not set]
localHostName	localHostName
maxBulkMailMessagesPerHour	0

Dialog Execution Server Settings page

2. Set the following parameters as specified:

> **Note.** If the parameter does not exist, click the Add button on the Dialog Execution Server Settings page to add the parameter. Some entries are listed as PSCypher Encrypted. Use the encryption utility at the bottom of the 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 BEA Tuxedo..

  The format is *//appserv.foo.com: 9000.*

- psToolsRel—The PepleSoft PepleTools version of BEA Tuxedo.

  The format is *8.46.03*. After every PeopleSoft PeopleTools release or PeopleTools patch upgrade, this variable should be updated.

- 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, to be used by the mailcasters.

  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 (PSCypher encrypted).
- psIBLocalNode—The local node of the PeopleSoft Integration Broker.
- psIBLocalNodePassword—The PeopleSoft Integration Broker password (PSCypher encrypted).
- dbVendor— The value depends on the RDBMS.

  Enter *DB2UDB, ORACLE*, or *MSSQL*.

- dedupIndexSpace—The value depends on the RDBMS.

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

- DedupTableSpace—The value depends on the RDBMS.

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

- ConnectId—The database user name.

- ConnectPswd—The database user's password (PSCypher encrypted).

- jdbcDriver—The class name of the JDBC driver used.

  It 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 database server, port when applicable, and database instance. The format of the URL is also dependent on the JDBC driver. The 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 also set parameters directly in the configuration file for the specific component. Parameters saved in these locations have the following precedence:

- The highest precedence is the configuration files (DES.config, MCR.config, ERP.config and WDG.config). Values set in the configuration files are always used by PeopleSoft OLM.
- The lowest precedence is the Settings page. Values defined in the Settings page will be overridden by values set in the other locations.

The advantage of using the Dialog Execution Server Settings page is that the settings used here are used globally, providing easier system maintenance. Configuration files should be used only for the database connection values. You must have a database connection to obtain these settings.

Task 4-5: Setting Up the FTP Server URL for File Upload

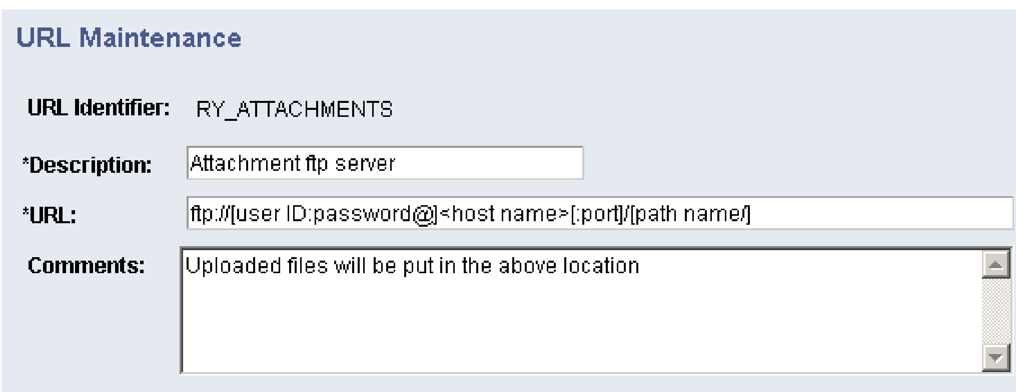
The File Upload feature of PeopleSoft CRM OLM requires an FTP server. The URL for the FTP server must be specified in the PeopleSoft CRM system.

To specify the FTP URL:

1. Select **PeopleTools, Utilities, Administration, URLs.**

2. Search for the *RY_ATTACHMENTS* URL and open it.

   The URL Maintenance page appears.



URL Maintenance page

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

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

Task 4-6: Setting Up the Web Profile to Bypass the Sign-In Page

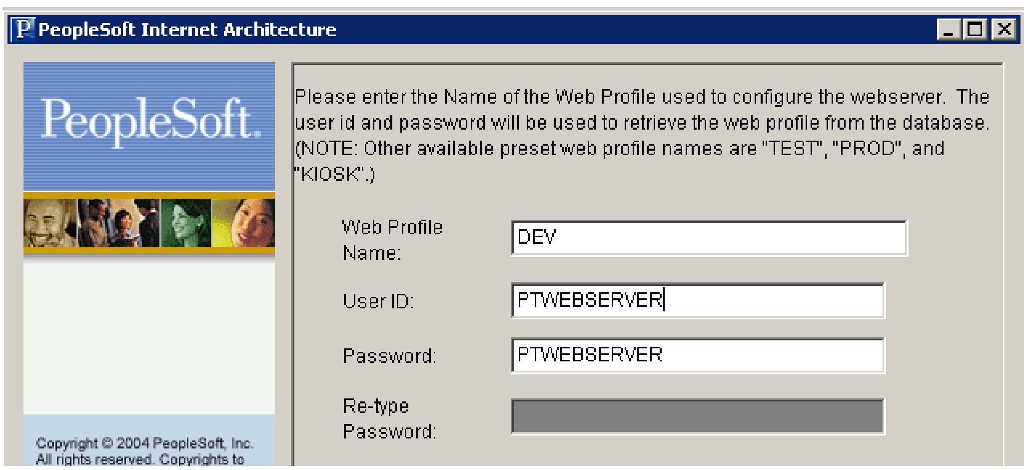
To access the PeopleSoft CRM Self-Service component directly from the Dialog Login page, the PeopleSoft Pure Internet Architecture web profile must be set to log on by default; that is, the PeopleSoft Pure Internet Architecture sign-in page must be bypassed.

To set up the web profile:

1. Decide which PeopleSoft Pure Internet Architecture server needs to bypass the sign-in page (which server is to be set to *byPassSignOn).*

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

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



PeopleSoft Internet Architecture: Web Profile page

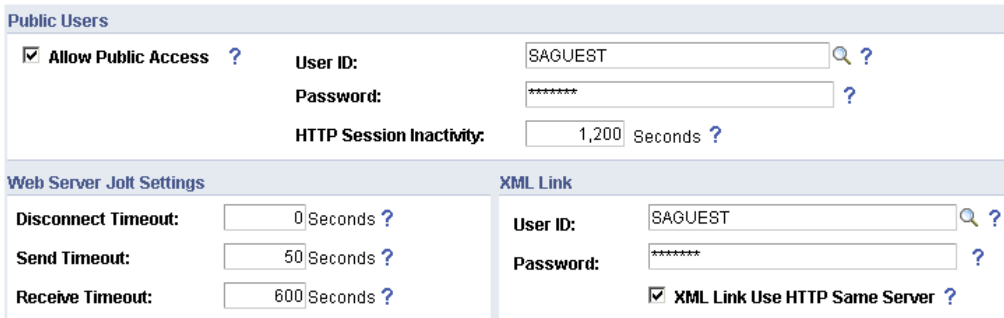
> **Note.** The default location of the configuration.properties file is: <%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

3. Select **PeopleTools, Web Profile, Web Profile Configuration**.

4. Search for and open the web profile that is defined in the **configuration.properties** file (for example, DEV).

5. Select the Security tab.

6. In the Public Users section, select the **Allow Public Access** check box and set the User ID and Password fields to *SAGUEST*:



Web Profile page: Security tab

7. Click Save.

8. Restart the PeopleSoft Pure Internet Architecture server.

Task 4-7: Assigning Self-Service Permissions to PeopleSoft OLM Users

The PeopleSoft Order Capture Self Service (OCSS) permission must be assigned to the PeopleSoft OLM user. Users *SAGUEST* and *OLM* are shipped with the appropriate self-service settings (OCSS permission set as the system default).

> **Note.** For user SAGUEST and OLM, you can skip the following steps and proceed to the step *Performing the CDM related setup*.

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

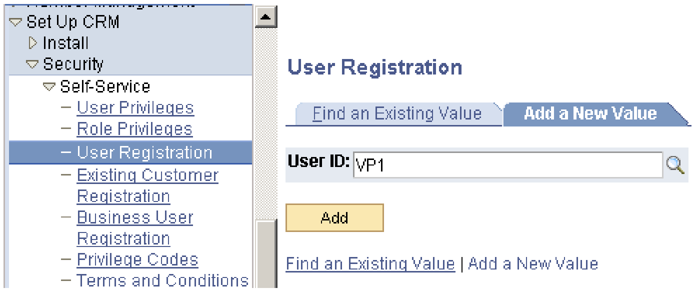
- The user needs to execute a dialog that includes creating a self-service user using the Dialog Link Report (uncommon).
- The user is a self-service “dummy” GUEST user (for example, SAGUEST) that needs to be able to register new users from the Dialog Login page.

Task 4-7-1: Registering the PeopleSoft OLM User in the Self-Service Application

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

1. Select **Set Up CRM, Security, Self-Service, User Registration.**

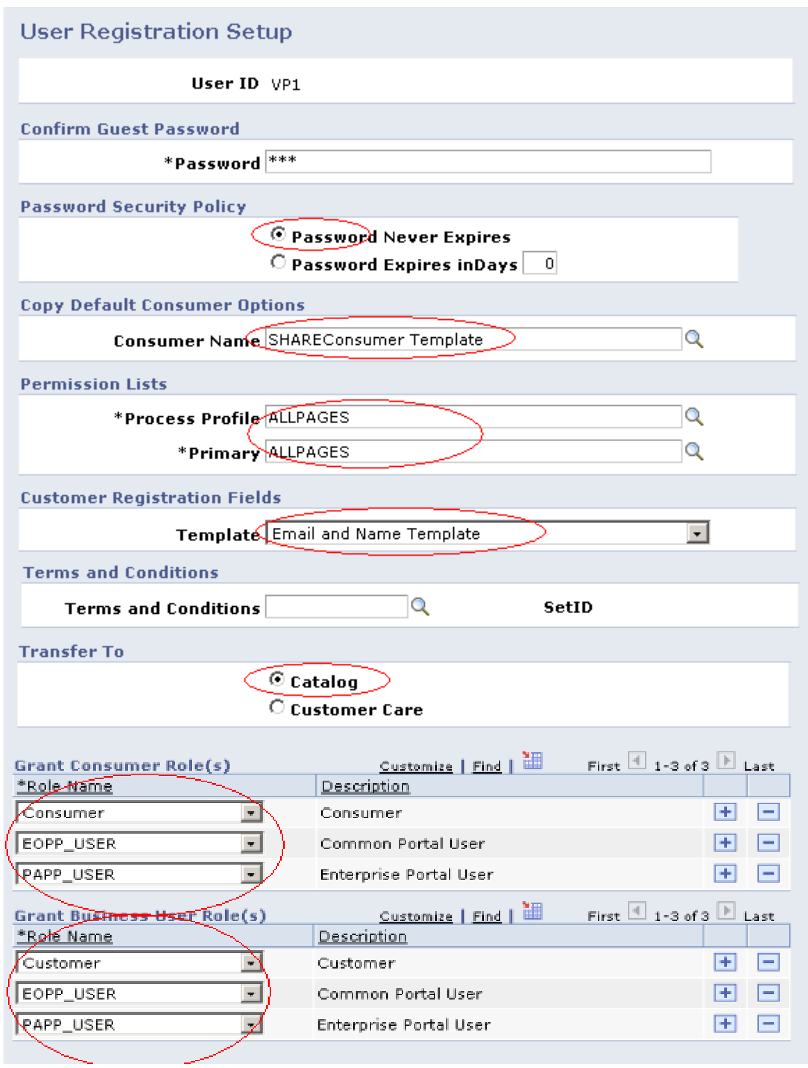
2. Select the Add a New Value tab and enter the user ID (for example, VP1).



User Registration page: Add a New Value tab

3. Click Add.

4. Complete this User Registration Setup page with the information in the following bulleted list:



User Registration Setup page

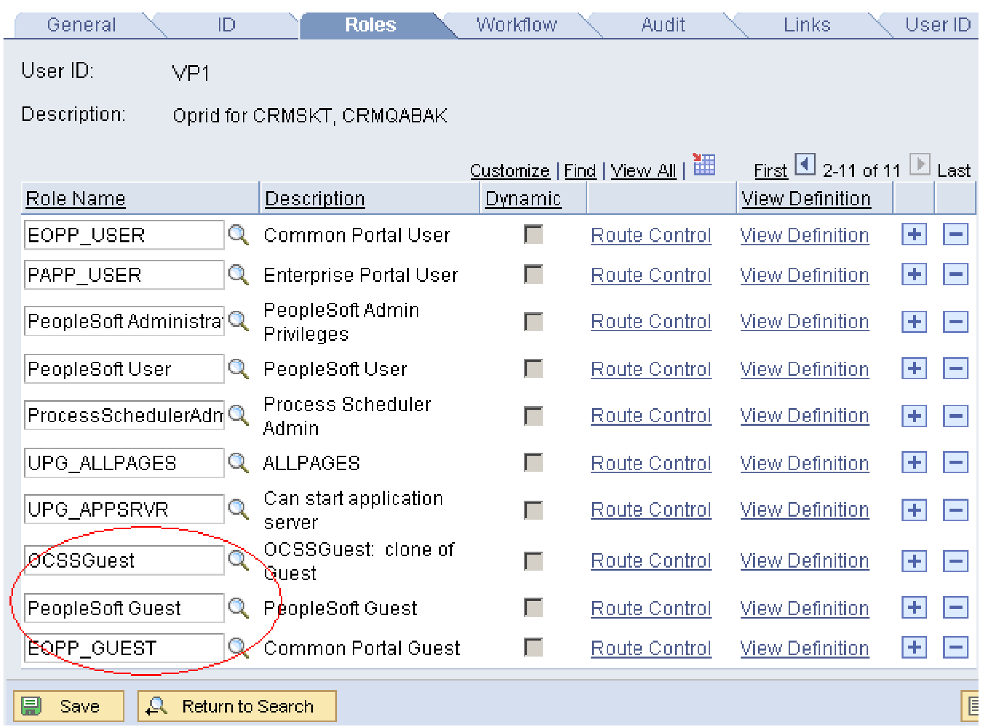
- Select the Password Never Expires option.
- In the Copy Default Consumer Options section, in the Consumer Name field, enter *SHAREConsumer Template*.
- In the Permission Lists section, in the Process Profile and Primary fields, enter *ALLPAGES*.
- In the Customer Registration Fields section, in the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

5. Click Save to save your changes.

Task 4-7-2: Assigning Self-Service Roles to a PeopleSoft OLM User

To assign PeopleSoft OCSS roles to the user in PeopleSoft PeopleTools:

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 these three roles are added to the list of role names, as shown.



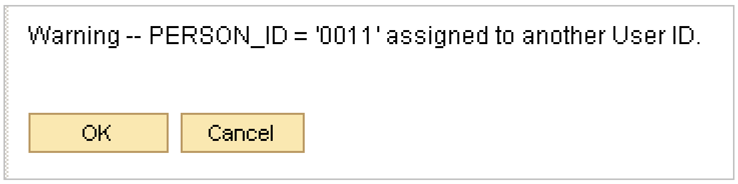
User Roles tab

- OCSSGuest
- PeopleSoft Guest
- EOPP_GUEST

4. Click Save.

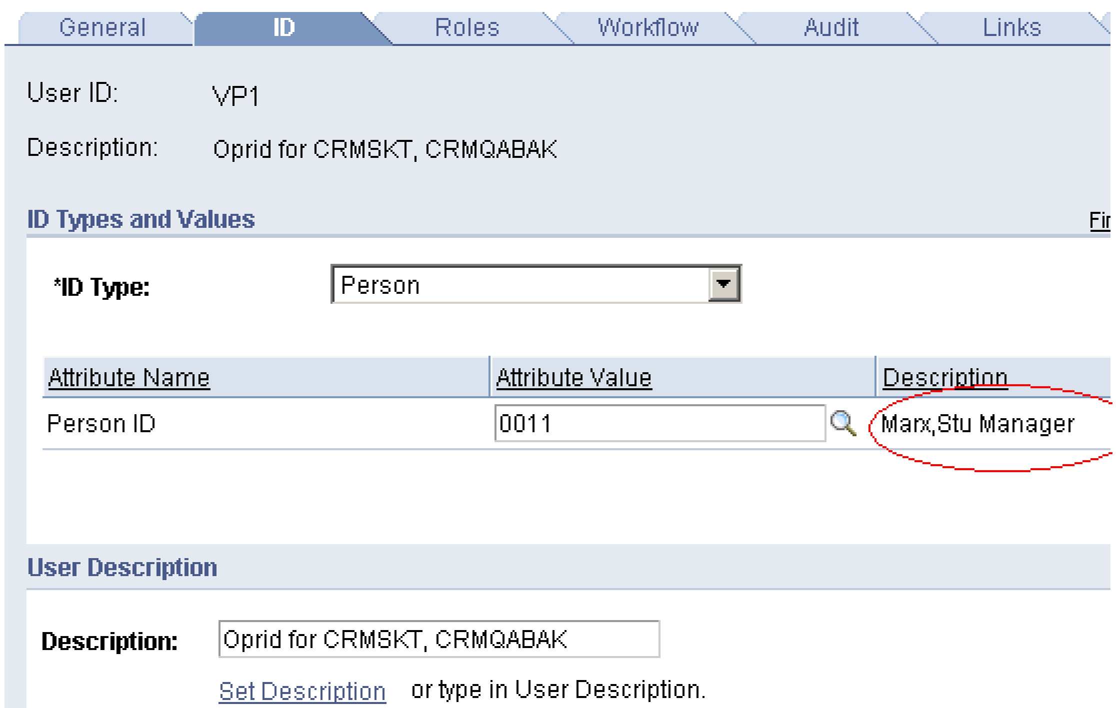
5. If you receive the following message, click OK:

```
Warning – PERSON_ID = '<ID>' assigned to another User ID.
```



User Profiles Setup Confirmation dialog

6. Select the ID tab and then select *Person* from the ID Type drop-down list.



ID tab

7. Enter a person ID in the Attribute Value field, and note the person ID or person's name.

   (100946 or *Template, SHAREConsumer*).

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

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook.*

8. Click Save.

Task 4-7-3: Performing the Customer Data Model Related Setup

To perform the Customer Data Model (CDM) related setup:

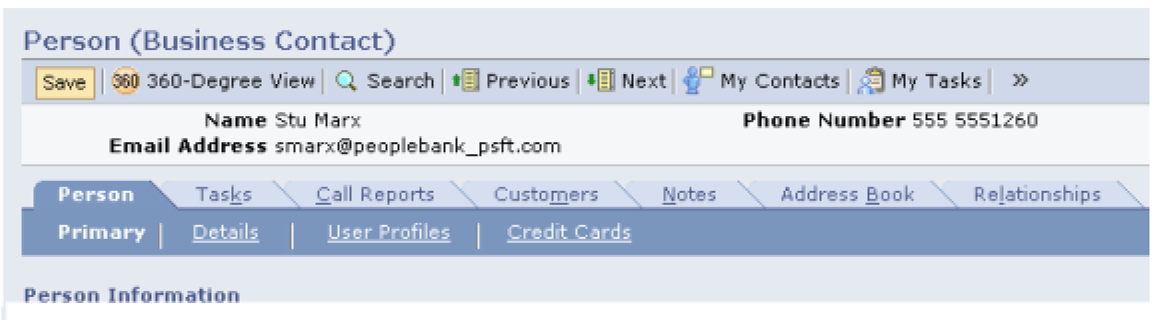
If you are working in the system database, you must create a person first, and that person should have both business contact and consumer roles.

Note. Perform this task for person ID – 0011 to complete this step for the PeopleSoft OLM user.

1. Select **Customer CRM, Search Person**.

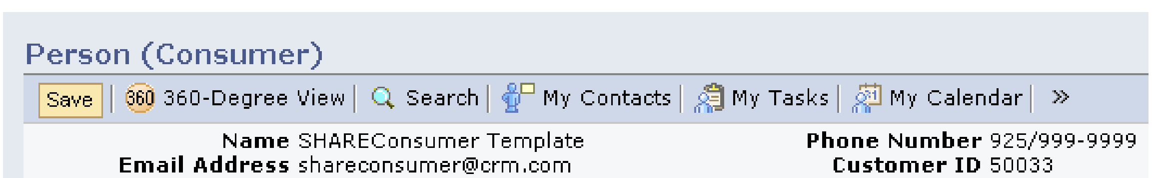
2. Search for and open the Person ID record that you just created in the previous task (for example, 0011 or Stu Marx).

If you see this person as **Business Contact** in the Person page, proceed to step 3 and 4.



CDM Person page

If you see this person as **Consumer** in the Person page you can skip step 3 and 4, and instead proceed to step **3*a*** and **4*a***.



CDM Person page

3. On the CDM Person page, click the **Add Consumer Information** link.

   The Person (Consumer) title appears at the top of the page.

CDM Person page

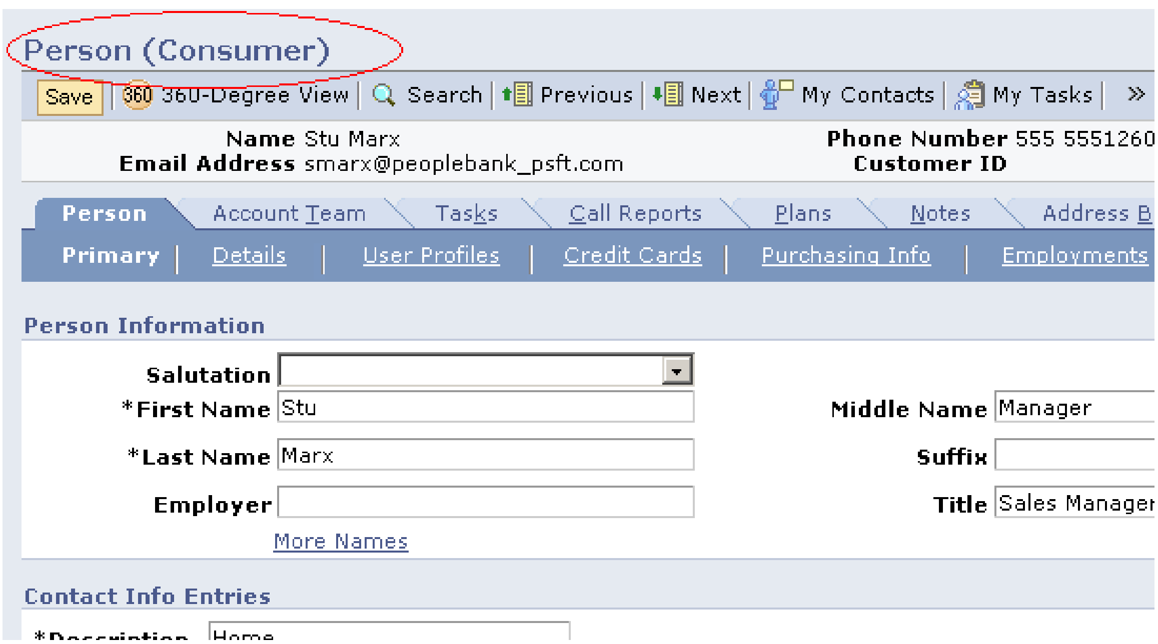
3.*a* On the CDM Person page, click the **Add Business Contact Information** link.

The Person (Business Contact) title appears at the top of the page.

CDM Person page

4. On the CDM Person page, click the **Add Consumer Information** link.

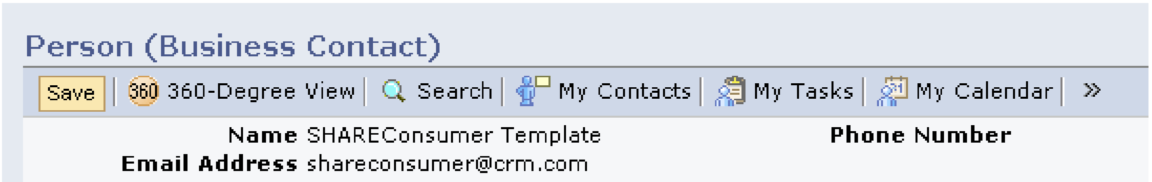
The Person (Consumer) title appears at the top of the page.



CDM Person page

4.*a* On the CDM Person page, click the **Add Business Contact Information** link.

The Person (Business Contact) title appears at the top of the page.



CDM Person page

5. Click Save to save your changes.

Task 4-8: Setting Up the PSFT_OLM Node

PeopleSoft CRM OLM uses XML messages sent directly to the PeopleSoft Integration Broker using JOLT. In addition, messages are used to update the OLM Activation Framework whenever an audience or profile status is modified.

Running the **omkpostconfigstatic.dms** script has already completed most of this task. However, one node configuration is not yet complete and must have the DES web server URL defined.

Task 4-8-1: Loading Gateway Connectors:

To load gateway connectors:

1. Select **PeopleTools, Integration Broker, Configuration, Gateways**.

2. Click Search.

3. Enter the URL: http://<webserver>:<port>/PSIGW/PeopleSoftListeningConnector

4. Click Load Gateway Connectors.

5. Click Save.

Task 4-8-2: Setting Up the URL for the PSFT_OLM Node:

To set up the URL for the PSFT_OLM node:

> **Note.** If you do not setup the Gateway, the connector HTTPTARGET will not be available.

1. Select **PeopleTools, Integration Broker, Integration Setup, Node Definitions**.

2. Search for *all nodes*. Find and then open the PSFT_OLM node by clicking Node Type.

3. Select the Connectors tab and set up the connectors as follows:

a) Select the Connector ID, *HTTPTARGET*.

b) Set the PRIMARYURL property URL to: *http://<webserver>:port/DCS/DlgBroker*

4. Click Save.

Task 4-9: Assigning the Process Scheduler Administrator to the User

To schedule PeopleSoft OLM related batch jobs, the Dialog Administrator user should also have a role defined as Process Scheduler Administrator.

To set up the process scheduler administrator role:

1. Select **PeopleTools, Security, User Profiles, User Profiles.**
2. Search and open a user (for example, VP1).
3. Click the Roles tab.
4. Add the role **ProcessSchedulerAdmin** in the role list.
5. Click Save.
6. Stop the application server, clear the cache, and then restart the application server.

Task 4-10: Retrieving and Installing the JDBC Drivers

If the PeopleSoft CRM database is installed on an Oracle or DB2 database, you must download and install the appropriate JDBC drivers for PeopleSoft OLM. An MSSQL driver is delivered with our product (JTurbo).

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

Task 4-10-1: Retrieving the JDBC Drivers

The drivers are:

- For Oracle: ojdbc14.jar, that you can download from http://otn.oracle.com/software/tech/java/sqlj_jdbc/htdocs/jdbc9201.html
- For DB2UDB: The DB2 JDBC driver comes with licensed Jar files, so the following three files are required:
    - db2jcc.jar

- db2jcc_license_cu.jar
- db2jcc_license_cisuz.jar

These files can be found in the java directory (or java12 for some installs) under the DB2 home directory on either the UNIX or the Microsoft NT database servers.

Task 4-10-2: Installing the JDBC Drivers

Before you begin this procedure, you must download the JDBC drivers, as previously discussed.

To install the JDBC drivers:

1. Place the driver jar files in the Process Scheduler system in the directory with the other classes:

   - For UNIX: *<PS_HOME>/appserv/classes*
   - For Microsoft Windows NT: *%PSHome%\class on NT*

   This applies to Oracle and DB2UDB only.

2. For the PeopleSoft OLM web server, the JDBC driver installation location depends on the type of web server you are running. This applies to DB2 UNIX only.

3. For BEA WebLogic web servers; in your domain directory (where you installed the OMK), locate the **setenv.cmd** file or the **setenv.sh** file. Edit this file to add the jdbc driver in the PSCLASSPATH.

   - For Microsoft Windows:

     SET PSCLASSPATH=;%PS_HOME%\webserv\%DOMAIN_NAME%\lib\ps_patch.jar;%WL_HOME%\server\lib\db2jcc.jar;%WL_HOME%\server\lib\db2jcc_license_cisuz.jar;%WL_HOME%\server\lib\db2jcc_license_cu.jar

   - For UNIX:

     PSCLASSPATH=:$PS_HOME/webserv/$DOMAIN_NAME/lib/ps_patch.jar:$WL_HOME/server/lib/db2jcc.jar:$WL_HOME/server/lib/db2jcc_license_cisuz.jar:$WL_HOME/server/lib/db2jcc_license_cu.jar

Note. For IBM WebSphere, place the driver in the C:\Apps\WebSphere51\AppServer\lib directory. For UNIX, place the driver in the WebSphereInstallRoot/AppServer/lib directory.

Task 4-11: Installing the Dialog Execution Server on an IBM WebSphere Server

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

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

Task 4-11-1: Creating a New IBM WebSphere Server/Domain

To create a new IBM WebSphere server/domain:

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, and do the following:

Note.	To exit the console, click the Exit tab at the top of the console window.

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

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

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

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

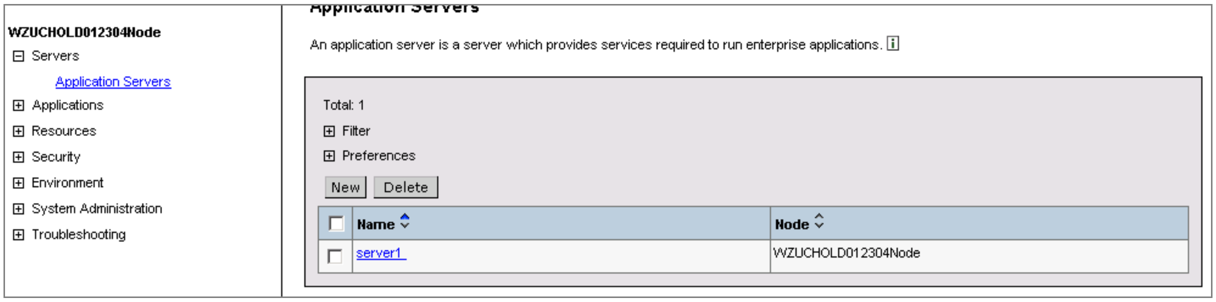
- On IBM AIX systems, the AIX Web-Based System Manager (WSM) may be running on port 9090. The WSM will prevent the IBM WebSphere Administration Console from running on port 9090. To prevent this conflict, change the IBM WebSphere Administration Console port.

3. Enter the user ID and click OK.

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

4. Click the Applications Servers link to access the Application Servers page.

5. Click the New button.

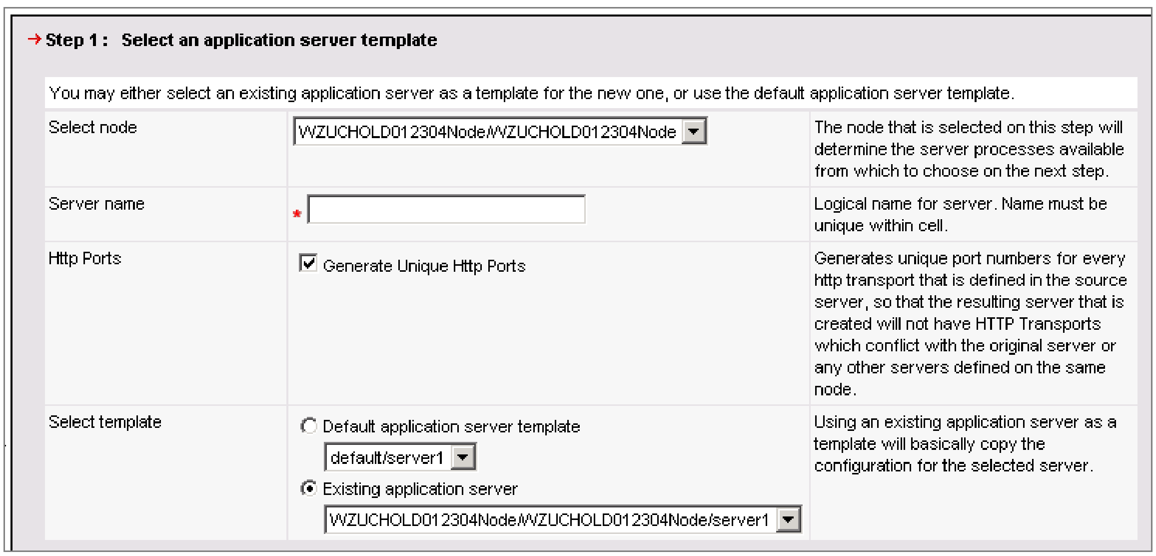


Application Servers page

6. Define a new server name (for example, EPDEMO, EPSYS).

7. Select an existing application server for the template.

   Use *server1* that you created earlier as the default.



Application Server Template

8. Click Next.

9. Click Finish.

10. Click Save.

11. Expand the Servers section and click Application Servers to validate that the second server was created.

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

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

Additional Properties page: Web Container link

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

Additional Properties page: HTTP Transports link

13. Click the HTTP Transports link to access the HTTP Transport page.

HTTP Transport

An HTTP transport for communicating requests to the web container.

Total: 4

⊞ Filter

⊞ Preferences

New Delete

	Host	Port	SSL Enabled
☐	*	9081	false
☐	*	9091	false
☐	*	9444	true
☐	*	9044	true

HTTP Transport page

14. Start the new server by running the command %WAS_HOME%\bin\startServer.bat omk in a command window (as previously instructed in this task).

Task 4-11-2: Creating and Removing Services for a Microsoft Windows Installation

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. Run the following command:

   wasservice –add EPDEMO –serverName EPDEMO

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

Windows command window

3. Go to Services and change the login account for the service to the local account that you created.

4. Start the service if it needs to be started for installing the DES.

Task 4-11-3: Installing the DES on IBM WebSphere for MS Windows NT

To install the Dialog Execution Server on an IBM WebSphere running on Microsoft Windows NT:

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

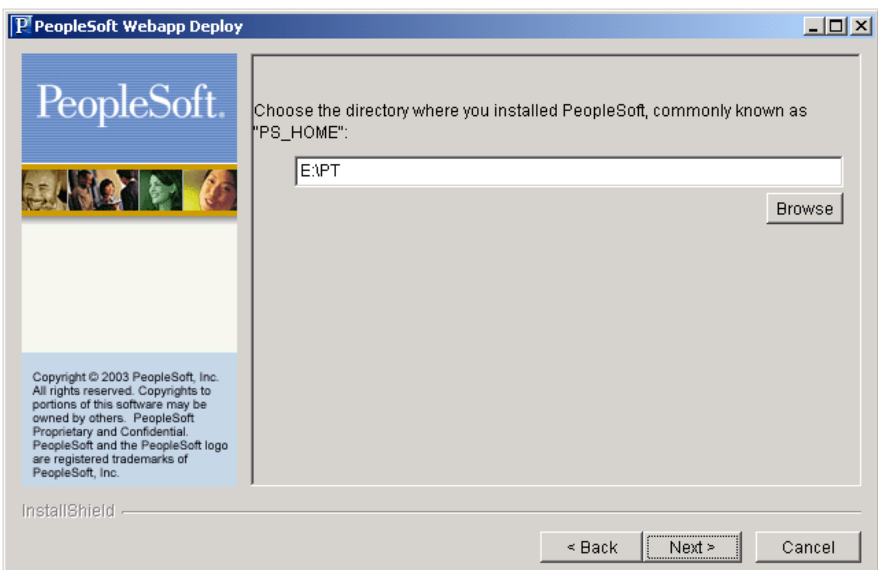
1. Go to *PS_HOME*\setup\mpwebappdeploy and run setup.exe.

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

2. On the PeopleSoft Webapp Deploy welcome page, click Next.

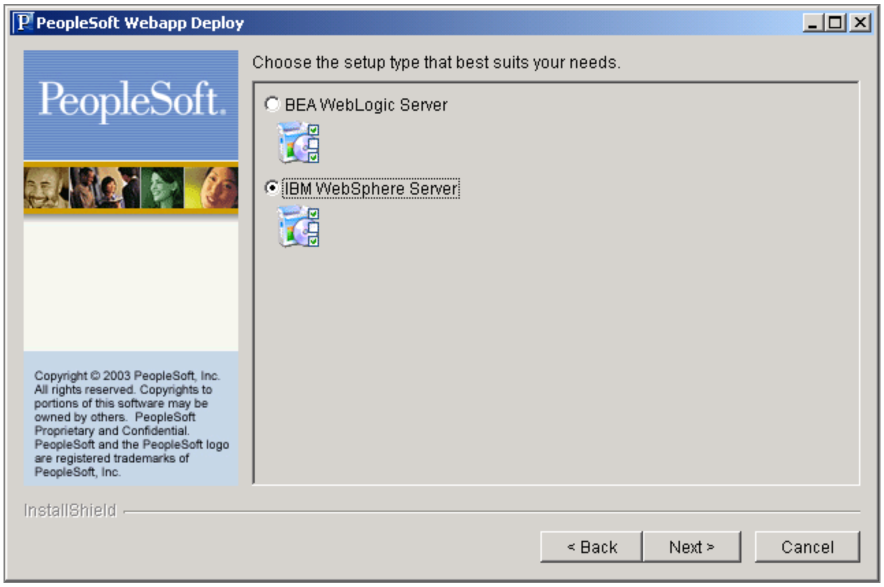
PeopleSoft Webapp Deploy welcome page

3. On the PeopleSoft PeopleTools directory selection page, enter the *%PS_HOME%* directory and click Next.



PeopleSoft Webapp Deploy: PS_HOME Directory Selection page

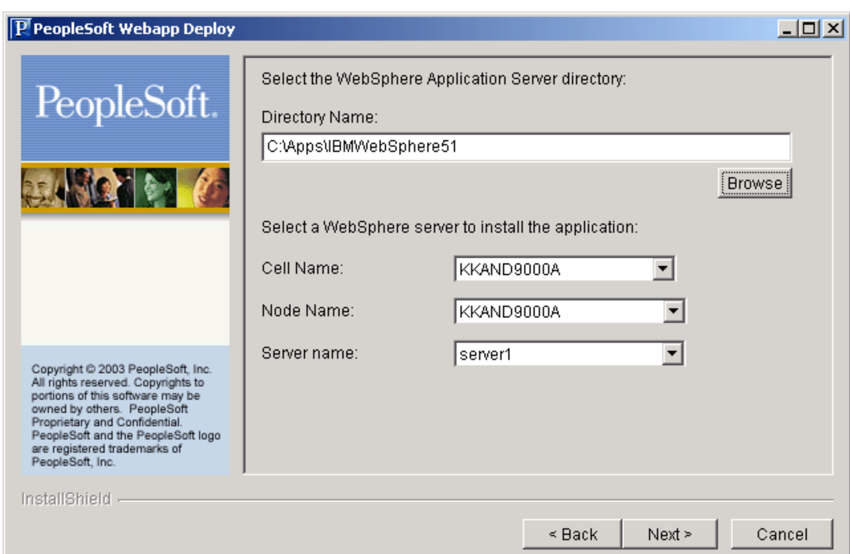
4. On the web server selection page, select the IBM WebSphere Server option and click Next.



PeopleSoft Webapp Deploy: Web Server selection page

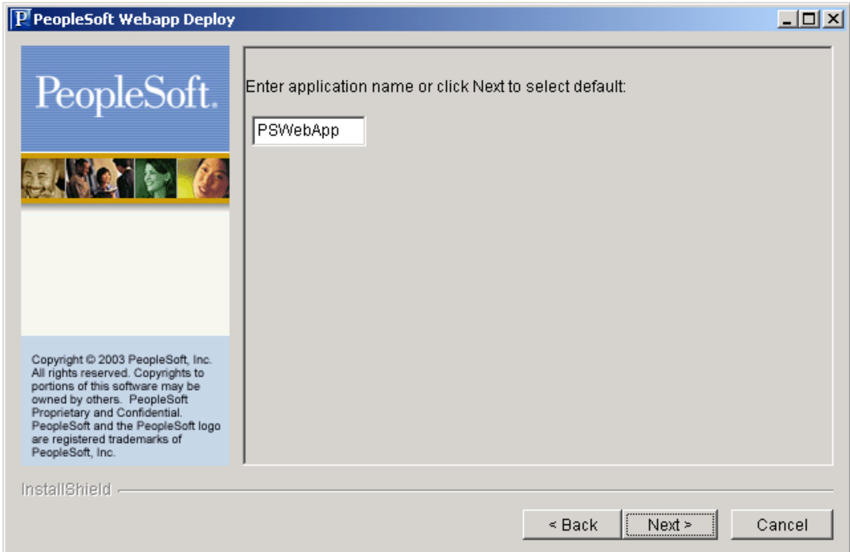
5. Complete the IBM WebSphere application server specifications page, as follows:

- In the Directory Name field, enter the IBM WebSphere Application Server directory *C:\Apps\IBMWebSphere51*.
- Enter the cell name, node name, and server name for the IBM WebSphere server.
- Click Next.



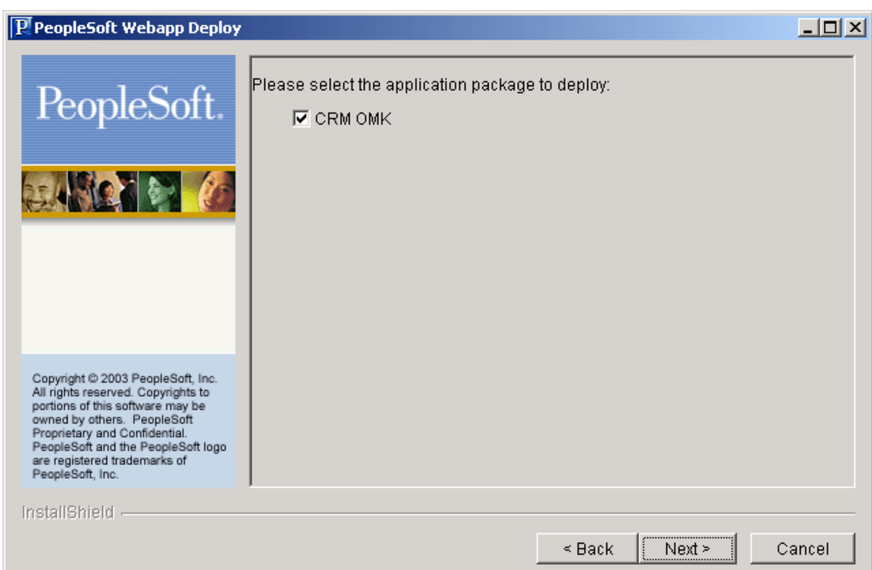
WebSphere Application Server Directory dialogue

6. On the application name selection page, enter the application name and click Next.



PeopleSoft Webapp Deploy: Application Name Selection page

7. On the application package selection page, select the CRM OMK check box as the application package to deploy and click Next.



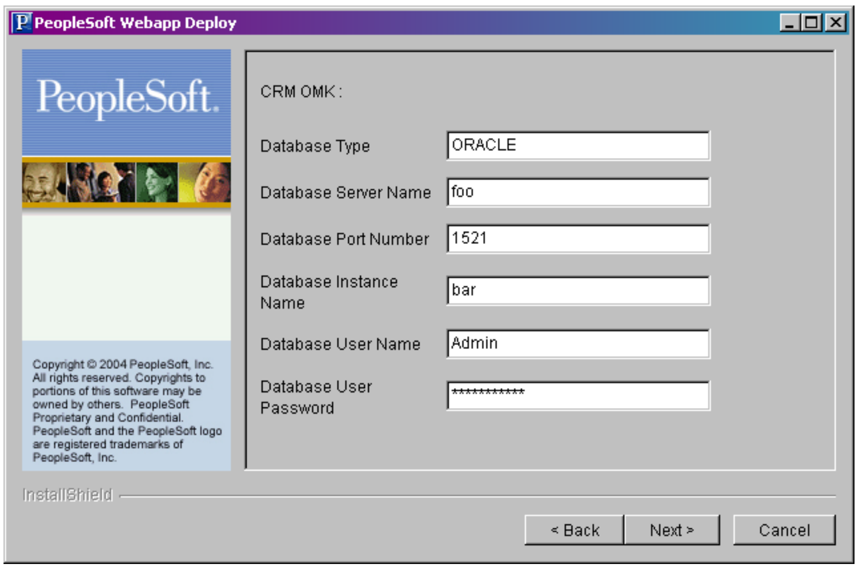
PeopleSoft Webapp Deploy: Application Package Deployment page

8. Complete the CRM OMK 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.

- In the Database Port Number field, enter *1521*, unless your database type is MSSQL. For MSSQL enter *0*.
- 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.

9. Click Next.

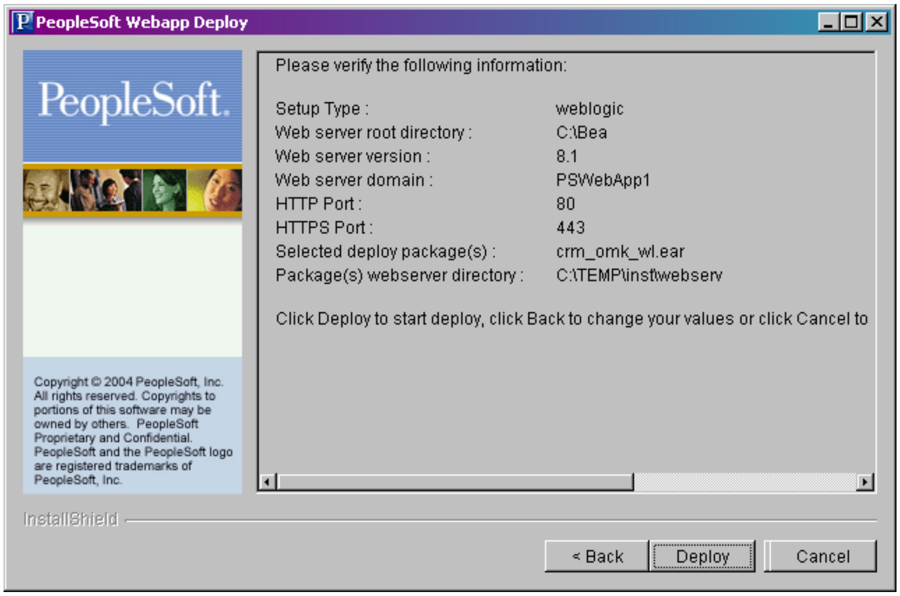


PeopleSoft Webapp Deploy: CRM OMK database information page

10. On the DES HTTP/HTTPS port selection page, enter the DES HTTP and HTTPS port numbers and click Next.

> **Note.** This port number must be different from your PeopleSoft Pure Internet Architecture port.

11. Verify that the information is correct. If the information is *not* correct, click the Back button and correct the issue.



PeopleSoft Webapp Deploy: Summary page

12. When you are ready, click the Deploy button to start the installation.

13. Click Finish to exit the installation.

14. Upon completion of deployment, copy the psjoa.jar from <*ps_home*>\webserv\<server>\<webapp.ear>\com.peoplesoft.crm.omk.war\WEB-INF\LIB to <*ps_home*>\webserv\<server>\webapp.ear>\

15. Restart the Dialog Execution Server on IBM WebSphere.

Task 4-11-4: Installing the DES on IBM WebSphere for UNIX

To install the Dialog Execution Server on an IBM WebSphere server on UNIX:

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

1. Go to *PS_HOME*//setup/mpwebappdeploy and run the appropriate setup command with these additional parameters:

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

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

2. After the following messages appear, enter *1* to continue:

   InstallShield Wizard
   Initializing InstallShield Wizard...
   Searching for Java(tm) Virtual Machine..............
   Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
   Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on your computer.
   Version: 8.46

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

   ```
   Specify a directory name or press Enter [/ds1/home/a890u40a]
   /products/WebSphere51/AppServer
   ```

4. Enter *1* to continue.

5. Select the setup type that best suits your needs (for example, enter *2* to select IBM WebSphere):

   [ ] 1 – BEA WebLogic Server

   [X] 2 – IBM WebSphere Server

6. To select an item, enter its number, or *0* when you are finished: [0] *2*

7. Enter *0* to continue.

8. Enter *1* to continue.

9. Accept the default or specify the location of the IBM WebSphere Application Server directory. For example:

   [/usr/WebSphere/AppServer] /products/WebSphere51/AppServer

10. Enter *1* to continue.

11. Specify the cell name.

    For example:

    [X] 1 - an-ibm01Node

12. Enter *0* to indicate that you are finished.

13. Enter *1* to continue.

14. Select the appropriate node name.

    For example:

    [X] 1 - an-ibm01Node

15. Enter *0* to indicate that you are finished.

16. Enter *1* to continue.

17. Select the appropriate server name.

    For example:

    [X] 1 - server1

18. Enter *0* to indicate that you are finished.

19. Enter *1* to continue.

20. Select the application name or accept the default.

    For example:

    [PSWebApp] OMK

21. Enter *1* to continue.

22. Select the application package to deploy (for example, enter *1* to select CRM OMK):

    [X] 1 - CRM OMK

23. Enter *0* to indicate that you are finished.

24. Enter *1* to continue.

25. Specify the CRM database information.

    For example:

    CRM OMK:

    ```
    Database Type: [MSSQL] DB2UDB

    Database Server Name: [] an-ibm007.

    Database Port Number: [0] 50004

    Database Instance Name: [] a890u40a

    Database User Name: [Admin] a890u40a

    Database User Password: [] a890u40a
    ```

26. Enter *1* to continue.

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

For example:

HTTP Port: [80] 19850

HTTPS Port: [443]

> **Note.** The HTTP port numbers must be different than your PeopleSoft Pure Internet Architecture port number.

28. Enter *1* to continue.

29. Review and confirm your selections before deploying the DES server.

    For example:

    Setup Type: websphere

    WebSphere application sever directory: /products/WebSphere51/AppServer

    Web server version: 5.1.0

    Web server node: OMK

    HTTP Port: 19850

    HTTPS Port: 443

    Selected deploy package(s): crm_omk_wl.ear

    Package(s) webserver directory: /products/WebSphere51/AppServer/webserv/an-ibm01Node_an-ibm01Node_server1

30. Enter *1* to deploy.

31. Upon completion of deployment, copy the psjoa.jar from <ps_home>/webserv/<server>/<webapp.ear/com.peoplesoft.crm.omk.war/WEB-INF/LIB to <ps_home>/webserv/<server>/webapp.ear >/

32. Restart the Dialog Execution Server on IBM WebSphere.

Task 4-12: Installing the Dialog Execution Server on a BEA WebLogic Server

An existing PeopleSoft Pure Internet Architecture domain on BEA WebLogic cannot be used for the Dialog Execution server. A new WebLogic domain will be created during the Dialog Execution server installation. Also, you cannot use the same PeopleSoft Pure internet Architecture HTTP/HTTPS port number for the Dialog Execution Server HTTP/HTTPS port number.

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

Important!	Using PeopleSoft CRM 8.9 or 9.0 with PeopleSoft PeopleTools 8.49 (or later) in conjunction with BEA WebLogic 9.2 will cause a series of errors and the DES will not deploy. Before you restart the DES application with BEA WebLogic 9.2, you must refer to the task *Modifying the BEA WebLogic File Prior DES Restart*, to determine if you must manually modify the weblogic.xml file before restarting the DES.

Note. Before you install the Dialog Execution server on a BEA WebLogic server, shut down any web servers that are running to avoid corruption.

Task 4-12-1: Modifying the BEA WebLogic File Prior DES Restart

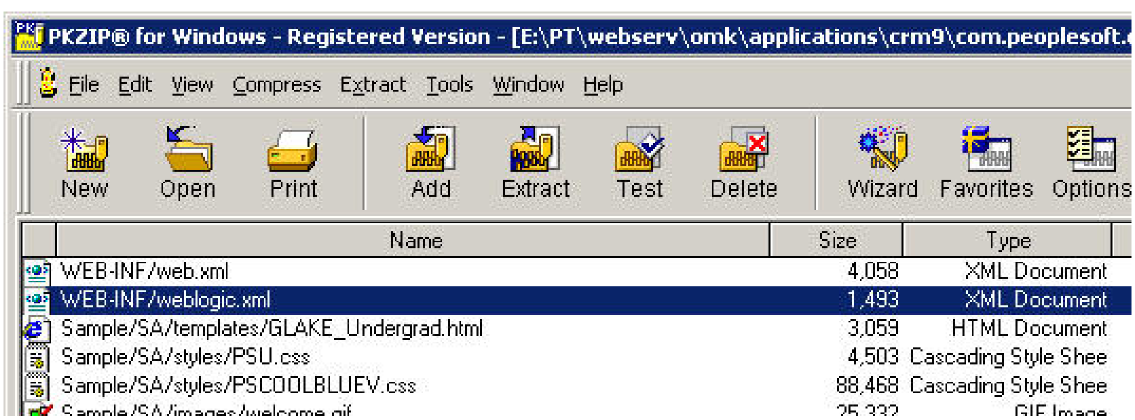
If you are using PeopleSoft CRM 8.9 or 9.0 with PeopleSoft PeopleTools 8.49 (or later) in conjunction with BEA WebLogic 9.2, you must follow these instructions to modify the weblogic.xml file before you restart the DES.

After the DES is installed, the following manual installation steps are required before you restart the DES.

To replace the BEA WebLogic.xml:

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

2. The WEB-INF weblogic.xml file highlighted in this PKZIP example must be replaced.



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

3. Refer to the contents of the modified weblogic.xml file as follows:

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- *************************************************************** -->
<!--      Confidentiality Information:                    -->
<!--                                                      -->
<!-- This module contains confidential and proprietary information -->
<!-- of Oracle; it is not to be copied, reproduced, or transmitted -->
<!-- in any form, by any means, in whole or in part, nor is it to  -->
<!-- be used for any purpose other than that for which it is       -->
<!-- expressly provided under the applicable license agreement.    -->
<!--                                                      -->
<!-- Copyright (C) 2007 Oracle. All Rights Reserved.               -->
<!-- *************************************************************** -->
<weblogic-web-app xmlns="http://www.bea.com/ns/weblogic/90"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <session-descriptor>
    <cookie-name>OMKSESSIONID</cookie-name>
  </session-descriptor>
  <context-root>/</context-root>
</weblogic-web-app>
```

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

> ***Warning!*** The file path must be the same as the original shown in the previous WinZip example:
>
> WEB-INF/weblogic.xml

5. Restart the DES.

Task 4-12-2: Installing the DES on BEA WebLogic for MS Windows NT

To install the Dialog Execution Server on a BEA WebLogic server running on Microsoft Windows NT:

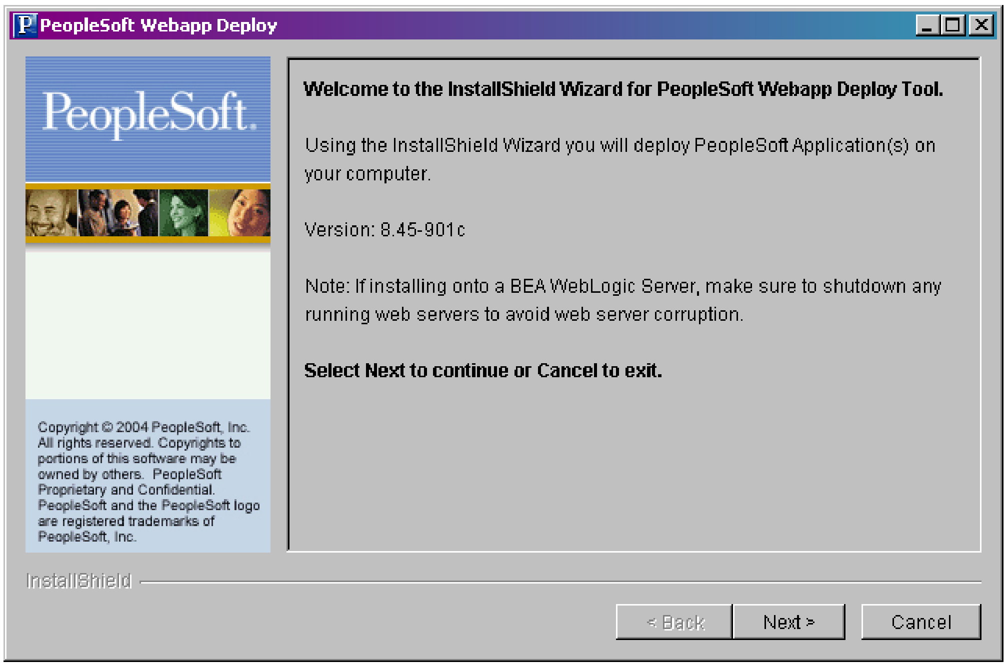
> **Note.** Outbound HTTP/S connection or Proxy server setup is required for proper PeopleSoft OLM application deployment during the installation process. To install PeopleSoft OLM on machines behind firewalls with access to the internet via a proxy server, use the following command:
>
> `setup -proxyhost <proxyhosname or IP> -proxyport <port>`
>
> If no proxy server is available, the DES Application can be manually deployed using the BEA WebLogic admin console after the web apps (DES) install completes. Refer to the *Deploying DES using BEA Weblogic admin console* section for more information.

1. Go to *PS_HOME*\setup\mpwebappdeploy and run setup.exe.

This runs an InstallShield program similar to the one used to install the PeopleSoft Pure Internet Architecture web server.

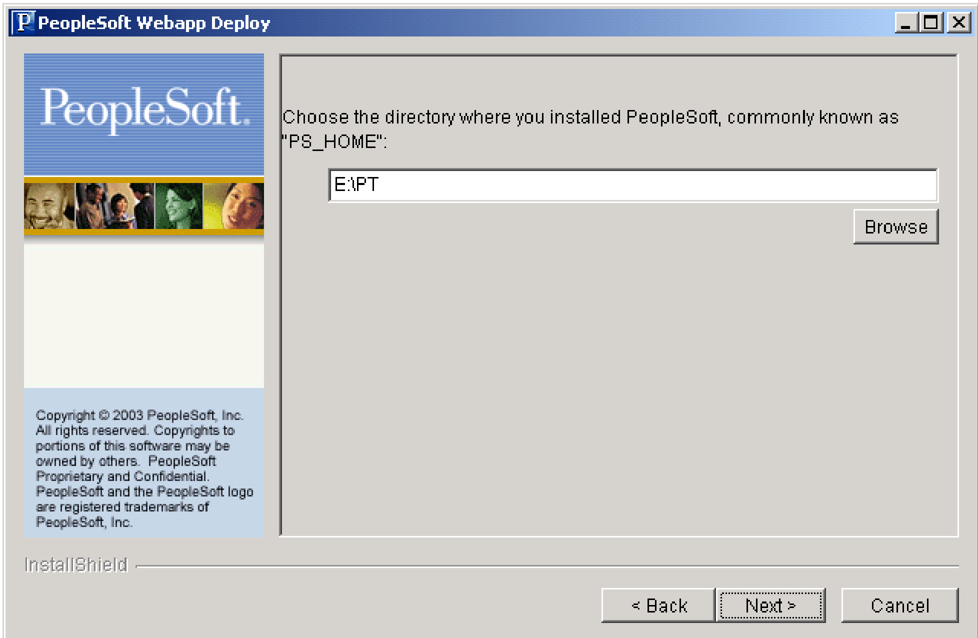
Note. For PeopleSoft PeopleTools 8.49, *mpwebappdeply* has been renamed *PsMpWebAppDeployInstall*.

2. On the Welcome page, click Next.



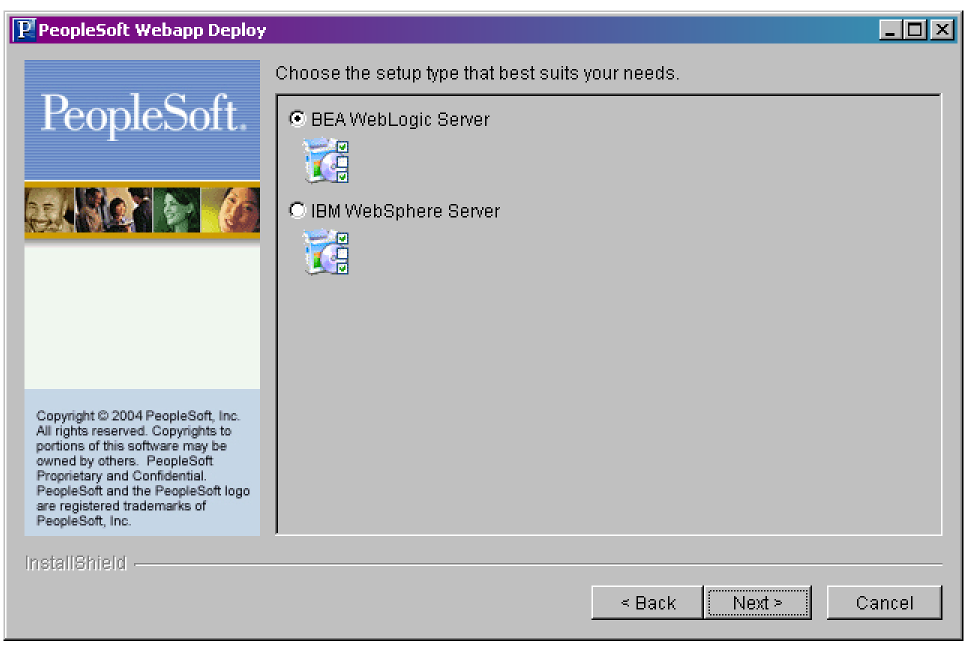
PeopleSoft Webapp Deploy: Welcome page

3. On the PeopleSoft PeopleTools home directory page, enter the *%PS_HOME%* directory and click Next.



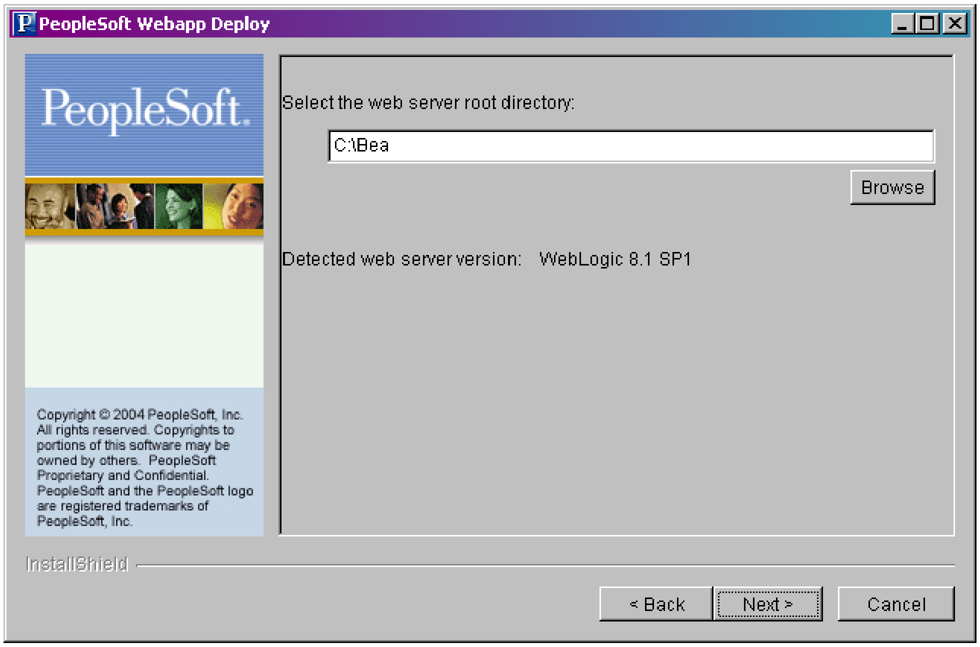
PeopleSoft Webapp Deploy: PS_HOME Directory Selection page

4. On the web server selection page, select the BEA WebLogic Server option and click Next.



PeopleSoft Webapp Deploy: Web server selection page

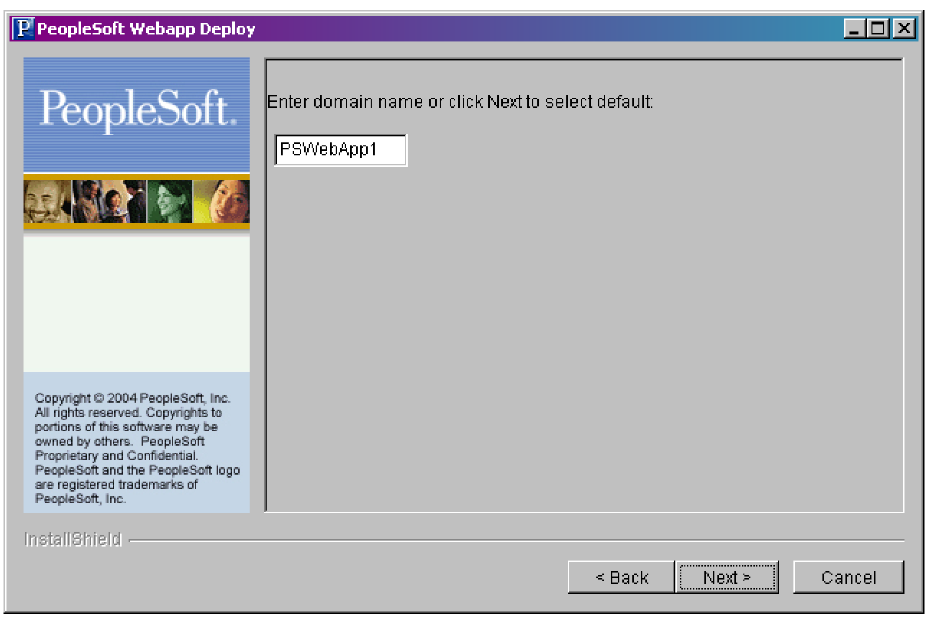
5. Enter the BEA WebLogic server root directory (for example, c:\bea) and click Next.



PeopleSoft Webapp Deploy: BEA WebLogic server root directory page

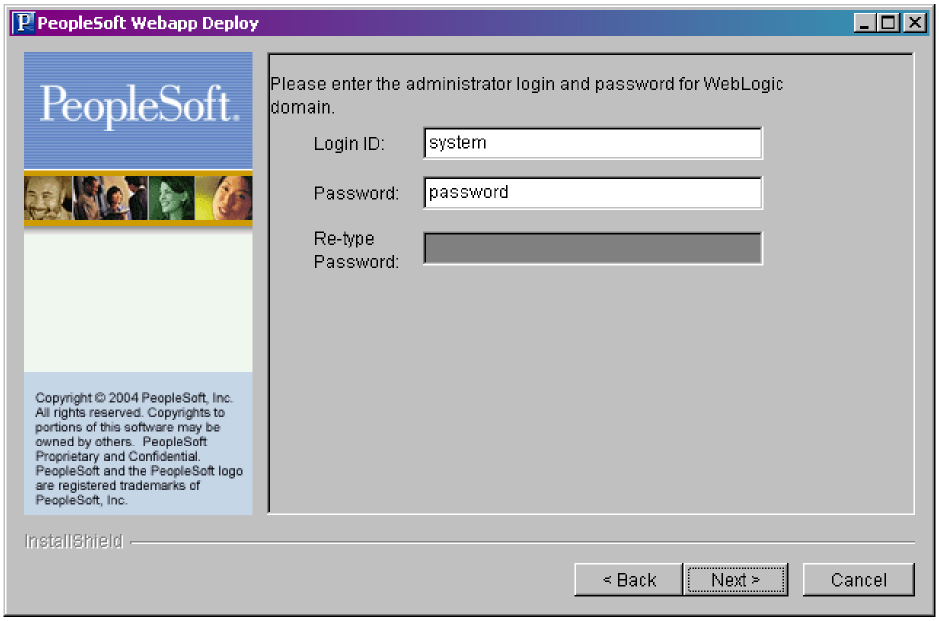
6. On the application name selection page, enter your new domain name (for example, *PSWebApp1*) and click Next.

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



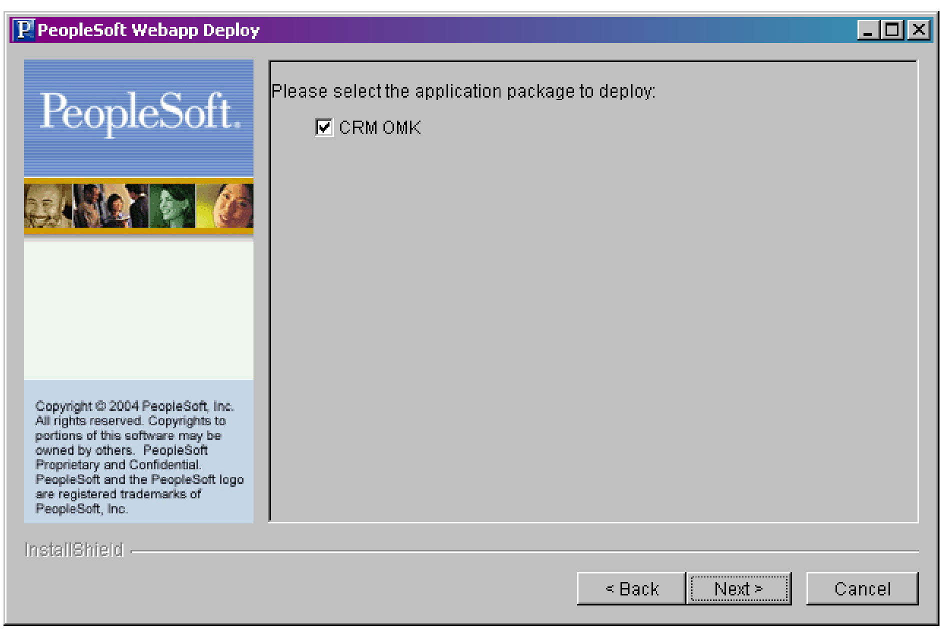
PeopleSoft Webapp Deploy: Domain name selection page

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



PeopleSoft Webapp Deploy: BEA WebLogic login information page

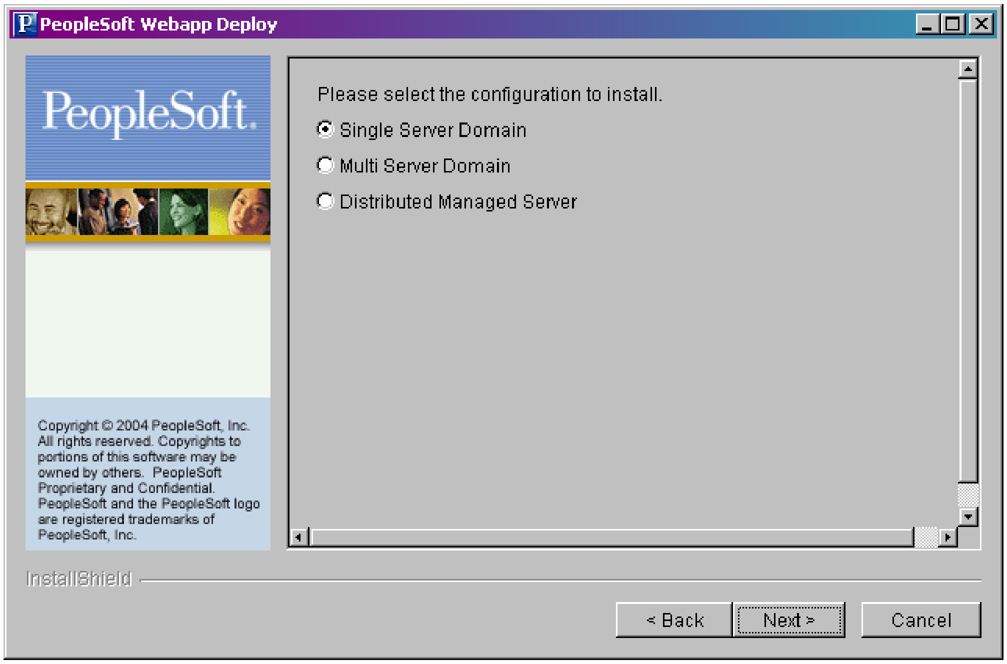
8. On the Application package selection page, select *CRM OMK* as the application package to deploy and click Next.



PeopleSoft Webapp Deploy: Application package Selection page

9. On the installation configuration page, select the Single Server Domain option and click Next.

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

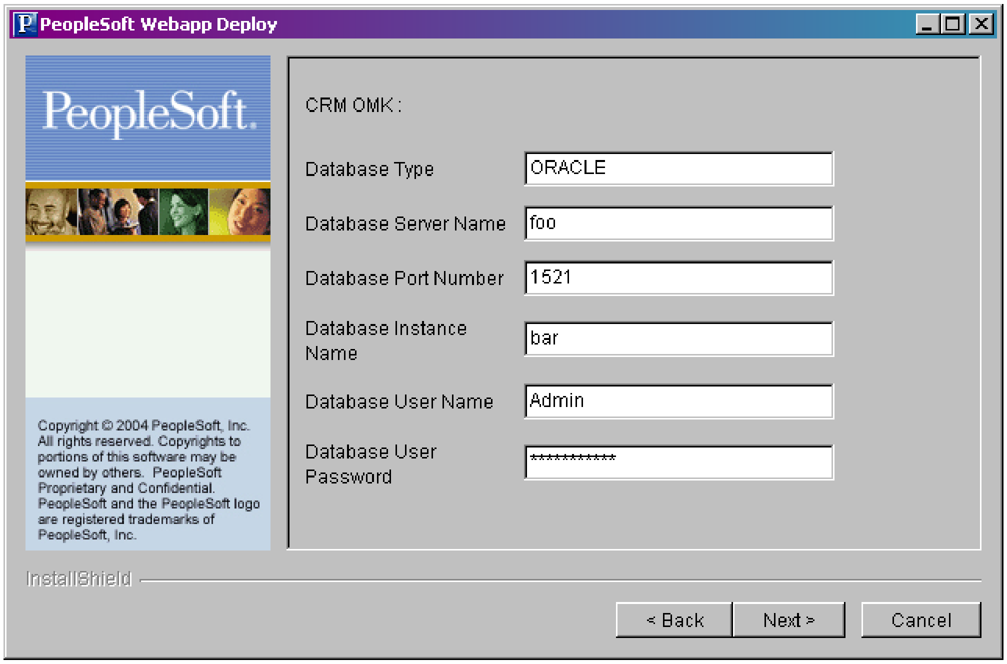


PeopleSoft Webapp Deploy: Installation configuration page

10. Complete the CRM OMK 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.
- In the Database Port Number field, enter *1521* unless your database type is MSSQL. For MSSQL enter *0*.
- 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 for the database user.

11. Click Next.



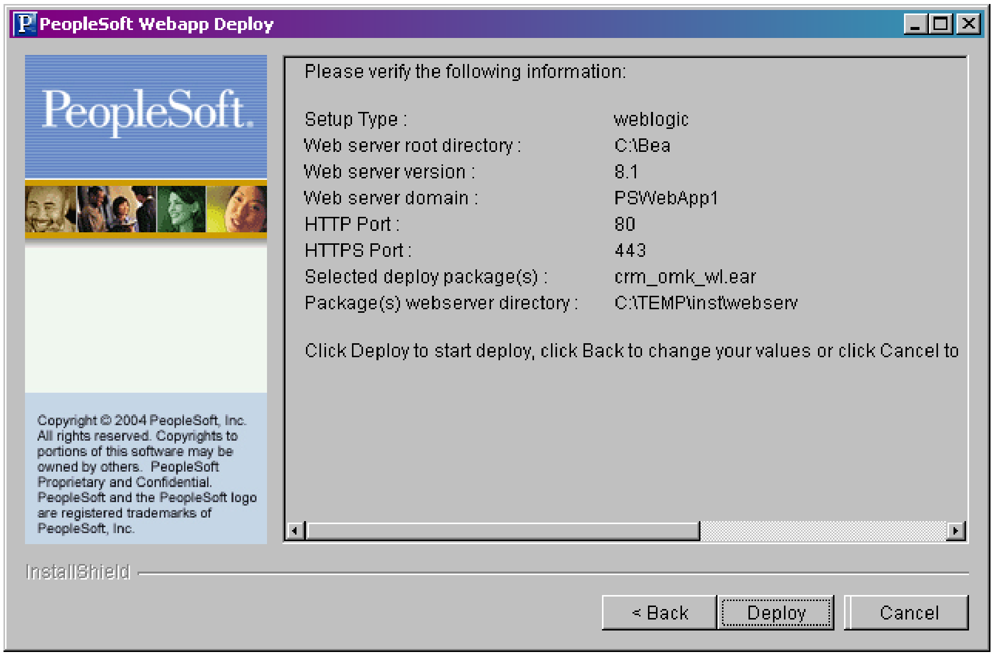
PeopleSoft Webapp Deploy: CRM OMK database information page

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

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

13. Verify that the information is correct.

    If the information is not correct, click Back and correct the issue.



PeopleSoft Webapp Deploy: Summary page

14. When you are ready, click Deploy to start the installation.

> **Note.** This process may take up to 5 minutes. If it does not finish in 5 minutes, check the DES0_stderr.log log file found in the DES installation directory for errors or information.
>
> For example: <*ps_home*>\webserv\ PSWebApp1\DES\DES0.stderr.log)

15. Click Finish to exit the installation.

Task 4-12-3: Installing the DES on BEA WebLogic for UNIX

To install the Dialog Execution Server on a BEA WebLogic server running on UNIX:

> **Note.** Outbound HTTP/S connection or Proxy server setup is required for proper PeopleSoft OLM application deployment during the installation process. To install PeopleSoft OLM on machines behind firewalls with access to the internet via a proxy server, use the following command:
>
> java -Dhttp.proxyHost=<proxyhosname> -Dhttp.proxyPort=<port> -cp setup.jar run –console
>
> If no proxy server is available, DES Application can also be manually deployed via BEA Weblogic admin console after the web apps (DES) install completes. Refer to *Deploying the DES Using the BEA Weblogic Admin Console* section for more information.

> **Important!** You must shut down any web servers before proceeding with your installation, to avoid web server corruption.

1. Shut down any BEA WebLogic server that is running.

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

2. Go to *PS_HOME*/setup/mpwebappdeploy and run the appropriate setup command with these additional parameters:

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

3. After the following messages appear, enter *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: 8.45

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

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

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

5. Select Next [*1*] to continue.

6. Select the setup type that best suits your needs:

   [X] 1 – BEA WebLogic Server

   [ ] 2 – IBM WebSphere Server

7. Select [*1*] to select BEA Weblogic Server.

8. Enter [*0*] to finish.

9. Select Next [*1*] to continue

10. Specify the web server root directory information.

    For example:

    Directory name: [/opt/bea] */ds2/home/upgtest2/bea81*

    Detected web server version: Weblogic 8.1 SP2

11. Select Next [*1*] to continue.

12. Enter the domain name or click NEXT to select the default *[PSWebApp]*.

13. Select Next [*1*] to continue.

14. Specify the Login ID and password, or press ENTER to accept the default:

    Login ID: [system]

    Password: [password]

    Re-type password: [password]

15. Select Next [*1*] to continue.

16. Enter *1* to select the CRM OMK for the application package to deploy:

    [X] 1 - CRM OMK

17. Select Finished [*0*] to indicate that you are finished with this step.

18. Enter *1* to select the Single Server Domain for the configuration to install:

    [X] 1 – Single Server Domain

    [ ] 2 – Multi-Server Domain

    [ ] 3 – Distributed Managed Server

19. Select Next [*1*] to continue.

20. 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

21. Select Next [*1*] to continue.

22. Enter the appropriate HTTP and HTTPS port numbers for 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]

23. Select Next [*1*] to continue.

24. 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

25. Select Deploy [*1*] to deploy.

Task 4-12-4: Deploying the DES Using the BEA WebLogic Console

To deploy the DES using the BEA Weblogic server console:

> **Note.** If you installed the DES for a web server running behind a firewall that does not allow outbound HTTP requests with run command **setup** and without specifying your proxy server information, you must deploy the DES manaully using the BEA Weblogic server console.

1. Start the Dialog Execution Server.

2. Log on to the BEA Weblogic Admin Console:

   http://<AdminServer_Name:AdminServerPort>/console

3. Select **Deployments, Applications**

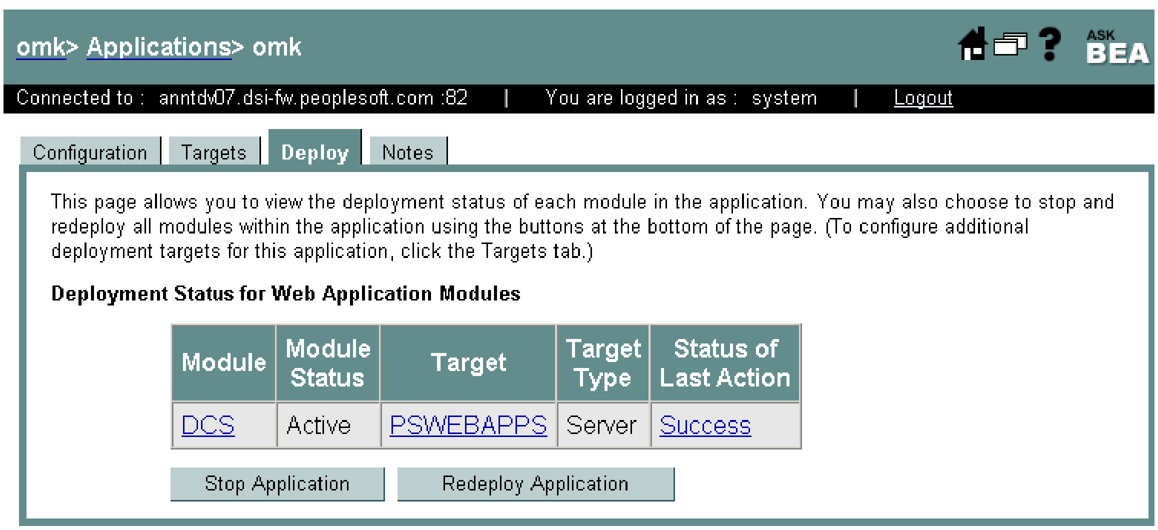
4. Click the **Deploy a new Application** link.

5. Select the location to *PS_HOME*\setup\mpwebappdeploy\archives.

6. Select **crm_omk_wl.ear** from the ear file list and click the **Continue** button.

7. Specify an application name (for example, omk) in the Name field, and click the **Deploy** button.

8. Wait until the **Status of Last Action** states **Success**:



Deploy DES in Weblogic server console

Task 4-13: Testing the Dialog Execution Server Installation

Before testing the DES installation, you should stop the application server, clear the cache, and then restart the server. Then start the Dialog Execution Server.

To test communication:

1. Test the communication to the server and that PeopleSoft CRM Online Marketing 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 are 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 are working properly, the web page displays the message “as: i am here”.

   If the previous tests do not return the expected “I am here” messages, then the installation is not correct and you must check the log files.

4. Check for errors in the DES log files:

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

   - For IMB WebSphere, the log files will be in these directories:
     - <ps_home>\webserv\ PSWebApp1\DES\DES0.stderr.log
     - <ps_home>\webserv\ PSWebApp1\DES\log\DES1_Debug.log
   - For BEA WebLogic, the log files will be in these directories:

     <PS_HOME>\webserv\<domain name>\DES\log\DES1_Debug.log

5. Verify that the DES is accessible from the PeopleSoft Pure Internet Architecture:

   a) Log on to PeopleSoft Pure Internet Architecture.

   b) Select **Marketing, Dialog Monitoring, Control Center, Server Monitor**.

   c) Click the **Timer Status** button.

   d) Check for this message “Scheduler Timer is running”.

6. Verify that the PeopleSoft Integration Broker for PeopleSoft OLM is accessible:

a) Select Peopletools, Integration Broker, Integration Setup, Node Definitions.

b) Search 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 4-14: Testing the Email Server

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

Perform the following tests:

- 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.
- On the Mailcaster system, telnet to port25 of the email server to test SMTP connectivity as follows:

```
telnet <emailserver> 25

HELO there

QUIT
```

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

```
telnet <emailserver> 110

HELO there

QUIT
```

Task 4-15: Adding Stand Alone Dialog Servers Such as Mailcaster, ERP, and Watchdog (Optional)

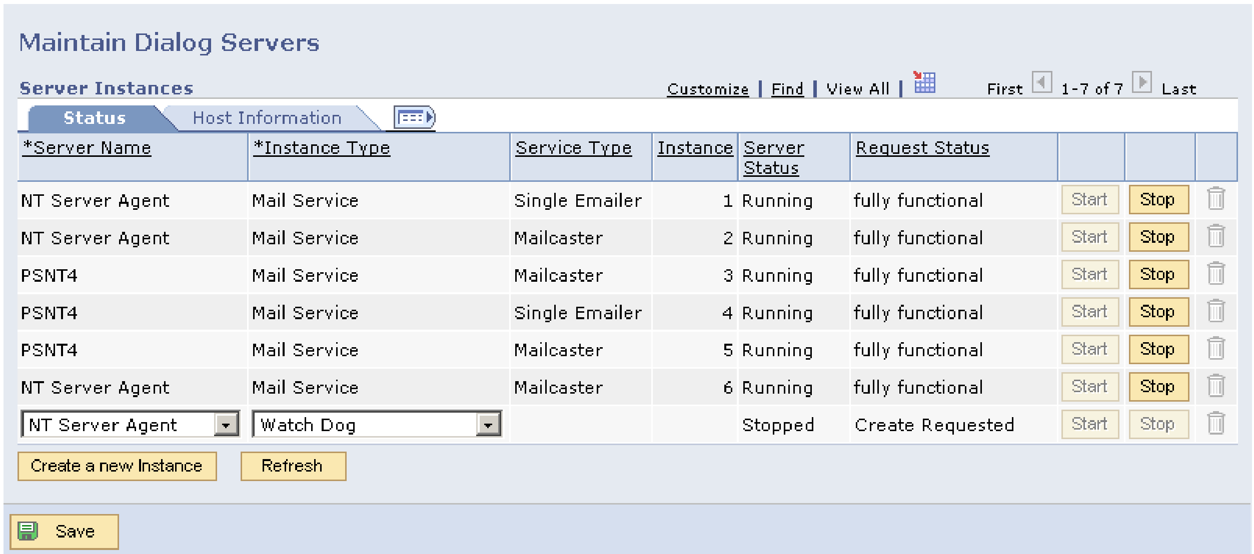
If you are running your batch servers on UNIX and want to run an enterprise resource planning (ERP) application, first you will need to copy the ptib.jar file from the DES installation to the *PS_HOME*/setup directory on the Batch server.

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

To add stand alone dialog servers:

1. Select **Marketing, Dialog Monitoring, Control Center, Maintain Dialog Servers**.

The Maintain Dialog Servers page appears:



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
- Watch Dog

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

Depending on the server type that you are installing, perform the following tasks to add stand alone dialog servers such as Mailcaster, ERP, and Watchdog:

Task 4-15-1: Adding the E-Mail Response Processor Service

To add the E-Mail Response Processor service:

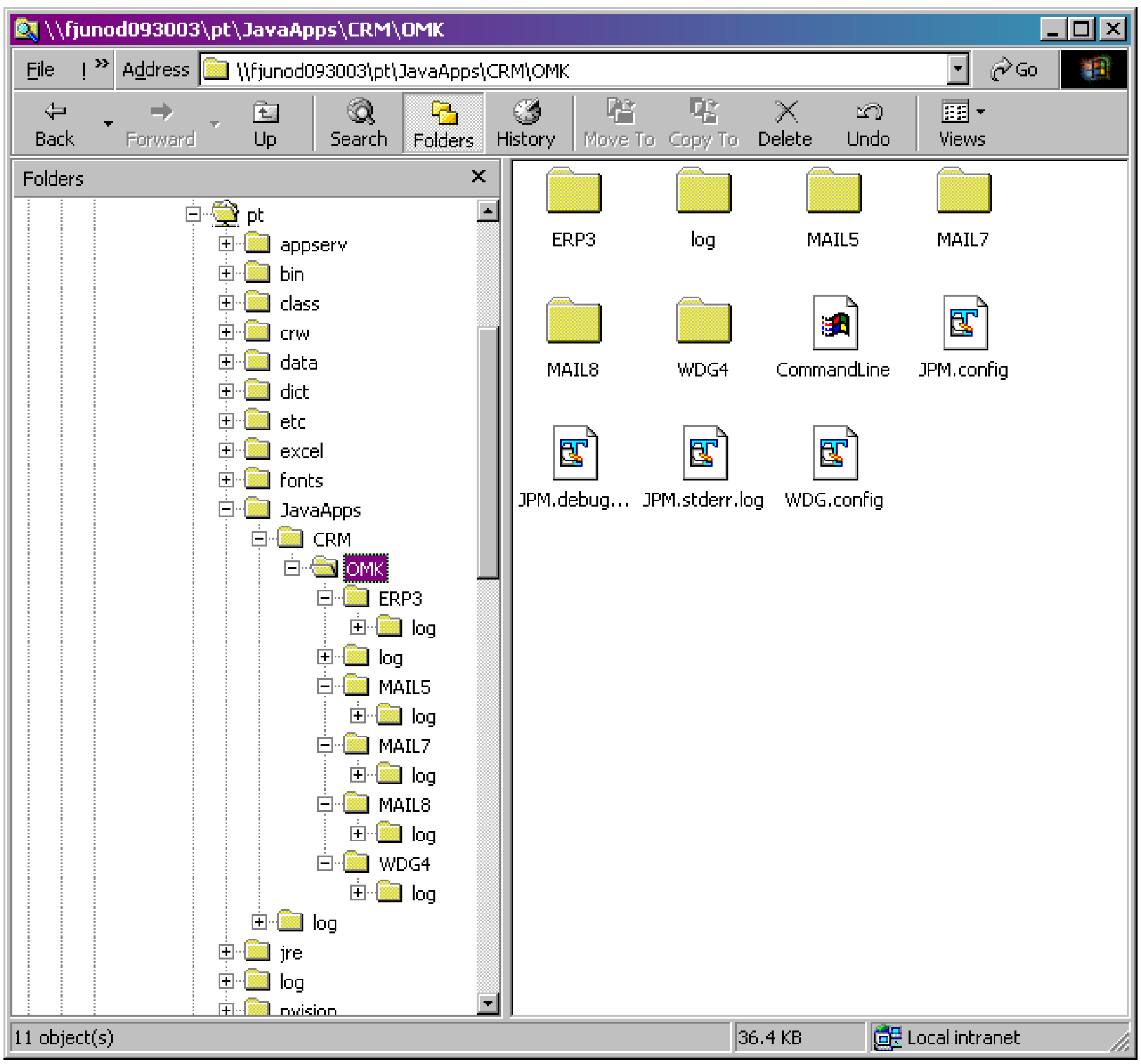
1. Select one of the following Service Type options, and then click Save:

   - *Bounce Process* – Select to manage mail bounces for cases in which the mail was sent to a nonexistent user.

   - *Reply Process* – Select to manage reply mails from existing users.

The request status is Create Requested. This status changes to *Create Successful* or *Create Failed* when the process completes..

When successful, this step creates a *PS_HOME*/JavaApps/CRM/OMK/ERP1 directory under the selected Process Scheduler installation:



Example of OMK directory

2. Go to the installation directory and edit either the bounce.script or the reply.script, depending on what you installed. Both scripts are put in this directory so that you can change the behavior of this ERP as necessary.

3. Modify the necessary parameters available here.

   All of the necessary information for parameter modification will not be available at the time of installation. Review the ERP documentation for details on configuring the ERP. Some fields prepopulate with the information available at the time of the installation.

   - 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 verses reply or both), change the script included at the end of the command. You can include both and the ERP process performs both.

   - If you want both the bounce and reply processing performed, we recommend that you set up both script files and change the commandLine file to include both script file names on the command line.

Task 4-15-2: Adding the Mail Service

To add the Mail service:

1. When prompted, select *one* of the following Service Type options:

- Mailcaster – To send bulk mails.
- Single Mailer – To send single mails.
- Frequency Mailer – To queue the bulk mails and single mails according the Frequency policy.

2. Click Save.

The request status is “Create Requested” and should eventually change to “Create Successful” if things worked OK, or to “Create Failed” if they did not.

This would have created a PS_HOME/JavaApps/CRM/OMK/MCR1 directory under the selected Process Scheduler installation.

You can review the MCR.config file found in the created directory, but you shouldn’t need to modify it unless you want to make any special changes.

If you want to change the type of mail service (bulk vs. single), edit the commandLine file and change the “-t” parameter. Use “single” for single mailer, “bulk” for bulk mail and “frequency” for frequency mail.

Task 4-15-3: Adding the Mail Server Service

To add the Mail Server service:

Both a single mailer and a bulk mailer or a frequency mailer are required.

Repeat the installation of the mail service again, selecting the other service type. This installs as MCR2 or CRM3.

1. When prompted, select the *other* Service Type from the following options:

- Mailcaster – To send bulk mails.
- Single Mailer – To send single mails.
- Frequency Mailer – To queue the bulk mails and single mails according the Frequency policy.

2. Click Save.

Task 4-15-4: Adding the Watch Dog Service

To add the Watch Dog service:

1. Watchdog has no service types, therefore you can click Save.

   The request status is “Create Requested” and eventually changes to “Create Successful” if the process was successful, or “Create Failed” if the process fails (requiring further investication).

   This creates a PS_HOME/JavaApps/CRM/OMK/WDG1 directory under the selected Process Scheduler installation.

2. Edit the WDG.config file that is included.

   The Watchdog configuration file is complicated. We recommend that you review the Watchdog documentation before attempting to configure the WDG.config file.

   If you are installing more than one watchdog on the same machine, the qkLookPort must be set differently in each of the config files. There is no significant reason to run more than one WatchDog on the same server.

   Adding additional services of each type increases the generated instanceID. The created directories reflect this instance ID. For example, a Mail Service with instance ID of 3 creates an MCR3 directory.

   After your services are in a “Create Successful” state, the “Start” button is enabled.

3. To start the service, click the Start button and then click the Save button (required).

   This sets the state to “Run Requested” which eventually changes to “Fully Functional.”

If the state becomes "Run Request Failed," furtherer diagnosis is necessary. The log files in the JavaApps directory tree can assist you with this diagnostic process.

When a service is up and running, the "Stop" button is enabled.

4. To stop a service, click the Stop button and then click the Save button (required).

   This changes the state to "Stop Requested" which eventually changes to "Shutdown Normally," or "Timed Out or killed by process monitor."

   This confirms that the process has stopped. If the state changes to "Stop Request Failed," then further investigation is necessary.

   After the process stops, the Trashcan button is enabled.

5. Delete the service and then click the Save button (required).

Task 4-16: Setting Up User Installation of the Adobe SVG Plug-In

A mechanism is provided to give access to the installation files. This allows you to control the installation of the Adobe SVG Plug-In.

The Dialog Designer that is used in PeopleSoft Online Marketing uses Scalable Vector Graphics (SVG) to allow drag and drop within a web interface.

For a normal web browser to have this capability, you must install a viewer plug-in. Adobe creates the required SVG Viewer plug-in, PeopleSoft Online Marketing requires version 3.0 or later of the viewer.

Note. If your system already has the SVG Viewer 3.0 or later, you do not need to install it again.

To Set Up the User Installation Facility:

1. Locate where the proper installation files for the version of the SVG Viewer that suits your user base is located on the Adobe website.

   Currently, all versions can be found at the following web address, http://www.adobe.com/svg/viewer/install/main.html, however this location is subject to change.

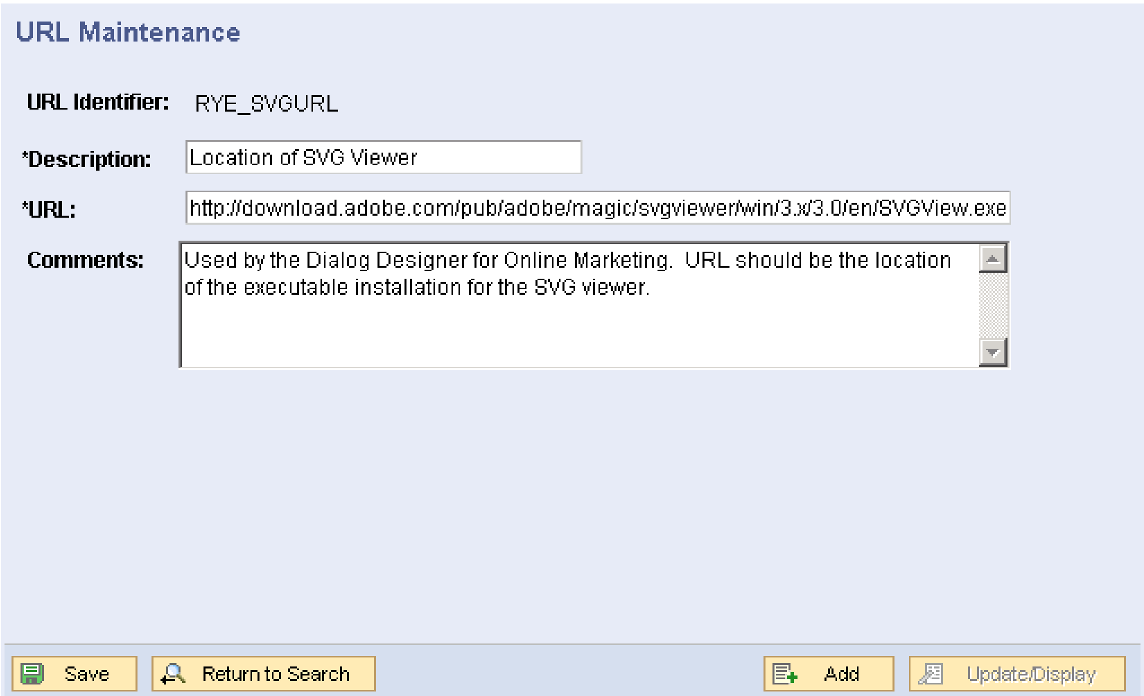
   The current English installation files for Win 98 –XP can be found at the following web address, http://download.adobe.com/pub/adobe/magic/svgviewer/win/3.x/3.01/en/SVGView.exe , and is subject to change.

2. Once the location of the installation has been established, IT personnel have the choice to either download the executable and save it locally on an internal web server, or they can point the file location to Adobe's site. This information becomes relevant in following steps for setting up the internal location.

3. Select **Peopletools, Utilities, Administration, URLs**.

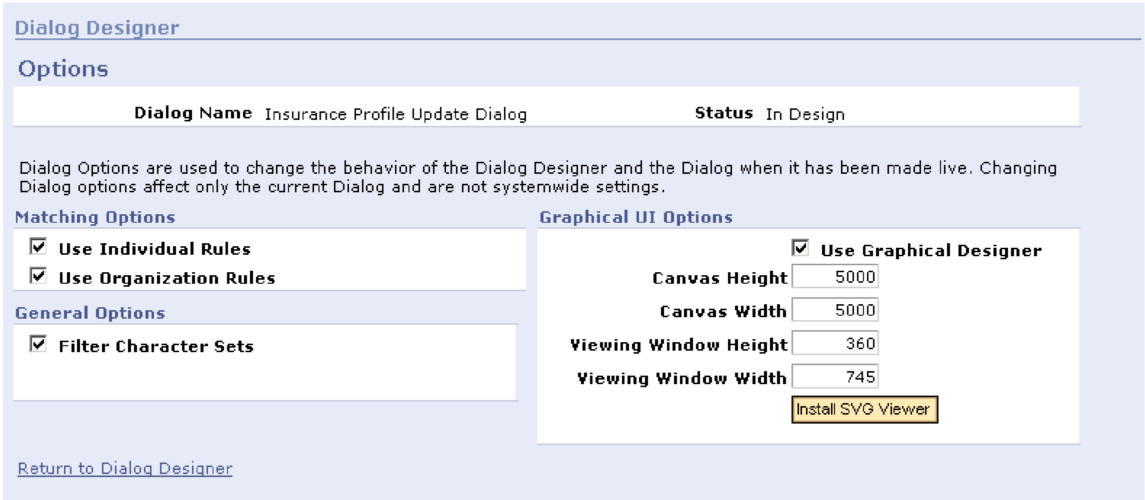
4. Search for the URL RYE_SVGURL and open it

The RYE_SVGURL URL is where the Dialog Designer application will look for the SVG Viewer installation file, so in order for the application to function correctly the URL field must contain the location of the installation files. The field is defaulted to the last known correct URL for the Windows version of the Viewer located on Adobe's website. If this URL is no longer valid or the location of the installation is different, this field must be changed.



URL Maintenance page

5. At this point if a user clicks the Install SVG Viewer button on the Dialog Option page in the Dialog Designer, the installation will be started.

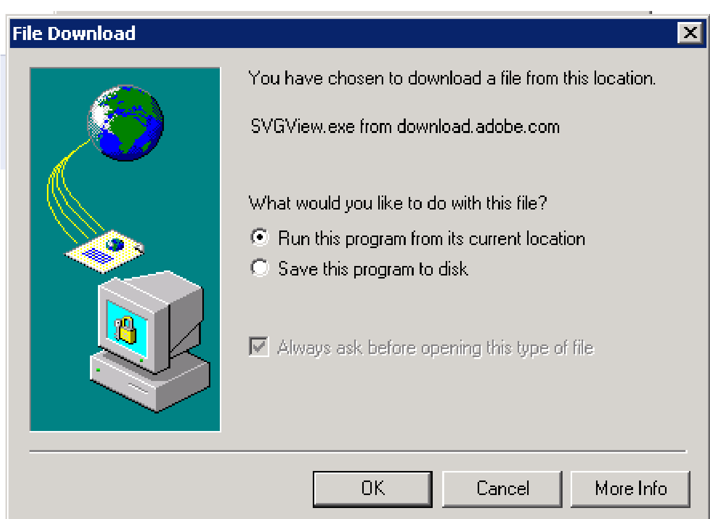


Dialog Designer page

6. Click the Install SVG Viewer button

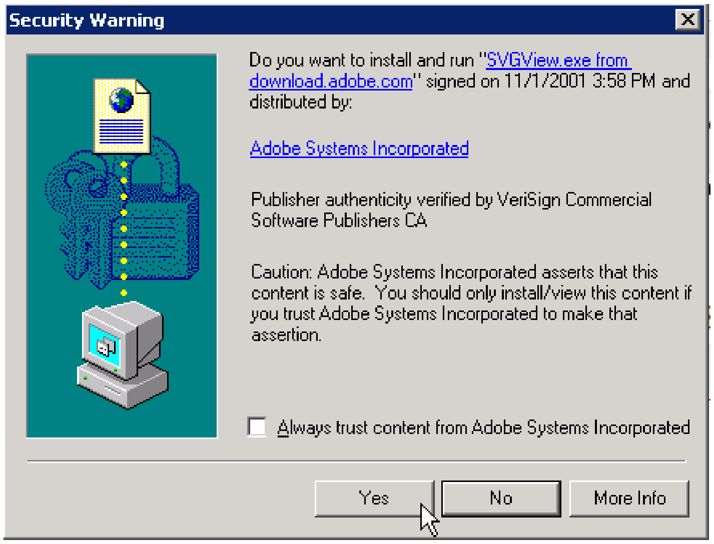
The File Download dialog box appears.

7. Select *Run this program from its current location*, and then click OK.



File Download dialog

The Security Warning dialog box appears.



Security Warning dialog

8. Click the Yes button to commence the installation.

PeopleSoft Online Marketing Tablespaces

This table lists the PeopleSoft OLM 8.9 tablespace names, the old OLM 8.4/4.0 tablespace names (as a reference for upgrade customers), and a description of each tablespace.

OLM 8.9 Tablespace Name	Old OLM Tablespace Name	Tablespace Description
RYAPP	USERS	General tablespace where most of the application-specific data is stored
RYWORK	DEDUP	Tablespace for OLM dedup tables. Dedup tables are used for Mailcaster to prepare the broadcast emails.
RYLARGE	EMAIL_LOG	Tablespace for the PS_RY_EM_DAY_CNT_1, PS_RY_EM_DAY_CNT_2, and PS_RY_FREQ_CNT tables.
RYLARG1	EMAIL_LOG_INDEXES	Tablespace for indexes on the PS_RY_BEMAIL_LOG, PS_RY_EMAIL_BOUNCE, PS_RY_EXP_EM_LOG, PS_RY_SMAIL_LOG, PS_RY_OPENMAIL_LOG, and PS_RY_VC_EM_IMPR tables. These tables contain email transaction history data.
RYLARG2	WEB_LOG	Tablespace for the PS_RY_WEB_LOG and PS_ RY_VC_WEB_IMP tables. These tables contain web transaction history data.
PSINDEX	WEB_LOG_INDEXES INDEXES DEDUP_INDEXES	Tablespace for indexes all OLM tables on Oraclefun

Customer Data Model Tablespaces

In addition to the specific tablespaces used by PeopleSoft OLM, some of the tablespaces within the PeopleSoft CRM Customer Data Model must also be resized to handle the large growth of individuals and organizations. This table lists the tablespaces that are affected by OLM growth and must be resized:

Tablespace Name	Tables Affected by OLM Growth	Comments
RBLARGE	PS_CM PS_BO_CM PS_BO_CM_USE PS_BO_ROLE PS_BO_REL PS_BO PS_BO_MKT_DATA PS_BC PS_BO_NAME	Many other tables use this tablespace, but its size will be greatly affected by PeopleSoft Enterprise Online Marketing transactions.

Tablespace Name	Tables Affected by OLM Growth	Comments
	PS_BO_TRIGGER PS_RD_PERSON PS_RD_COMPANY	
PSINDEX	Index tablespace for: PS_CM PS_BO_CM PS_BO_CM_USE	
RABLARGE	PS_BO_BASIC_IND PS_BO_BASIC_ORG	
RABINDEX	Index tablespace for: PS_BO_BASIC_IND PS_BO_BASIC_ORG	

Note. Ensure that each of the preceding tablespaces is properly sized and active.

Changing Parameter Values

If you change the value of any parameters from the PeopleSoft Pure Internet Architecture (PIA) Settings page, or you change and overwrite the value of Settings in each components configuration file (for example: DES.config, MCR.config, WDG.config, and ERP.config), you must stop and restart the components affected by the parameters before the new setting can take effect.

Note. Script files for local use must be used to configure the email response processor. Review the *Email Response Processors Documentation* for more information on the syntax of the scripting language.

Parameter Descriptions

The following table describes the PeopleSoft Enterprise Online Marketing parameters in alphabetical order. It also indicates the PeopleSoft Enterprise Online Marketing component that uses each parameter.

Note. If you change the value of any parameters, you must stop and restart the components affected by the parameter before the new settings can take effect.

Parameter Value	Components	Description
agingCacheLifeSpan	DES	For internal use only.
agingObjectAgeLimitMins	DES	For internal use only.
allowOwnRmiRegistry	Mailcaster	Start own RMI registry is none is running already.
automaticMailJobRecovery	Mailcaster	Specifies whether the Mailcaster will try to automatically recover a running job that has not been updated for a specific period of time. If set to false, 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. If set to true, the Mailcaster recovers the job, which might result in the sending of duplicate emails. The Mailcaster uses the mail jobs recovery log table to reconstruct the job. However, because there is a gap between the sending of the mail and writing to the recovery log, it is possible that, at most, one duplicate message will be sent per send mail thread. The default value is true.
broadcastRequestDESTimeout	DES	Timeout in milliseconds for broadcast request
bulkMailerDropDedup	Mailcaster	Specifies whether to drop the Dedup table after mail job has completed successfully. The default is true.
bulkMailerMaxErrorRetryAttemps	Mailcaster	Specifies the number of tries the Mailcaster will attempt to connect to the SMTP server before raising an error. (Note that the misspelled word “Attemps” must be entered as shown.)
cgiProgramPath	All	Specifies the path of the web server gx.cgi program. The default is DCS. Also used by Online Marketing to tell the Campaign Server to clear cache, and to generate the Dialog Link Report. To ensure that the path information is read correctly at startup, you should set this value in the configuration files rather than using the Settings feature in the Online Marketing Client.
clearCacheGracefully	DES	Method of clearing cache
clearCachePerObject	DES	Method of clearing cache deeply
clearCacheThreads	DES	Number of threads that clear cache in background.
clearCacheTimeoutSecs	DES	Time for a clear cache request to time-out in seconds
clearCacheWait	DES	Time to wait for current clear cache requests to finish in milliseconds
companyBasicsProfileName	DES	For internal use only.

Parameter Value	Components	Description
contactBasicsCompanySysIdElementName	DES	For internal use only.
contactBasicsProfileName	DES	For internal use only.
ConnectId	All	DB User Name
ConnectPswd	All	DB User's 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: contentTransferEncoding=8bit.
createObjectsInExternalThread	DES/ERP	Create and destroy Jolt Connection in a separate thread.
dedupDisablePageLockMSSQL	DES	Avoids page locking on MSSQL while dedupping (experimental)
debugFileSeverityThreshold	All	The debug log error severity level (Note: not including trace lines)
dbServerURL	All	How the Online Marketing components connect to the database. MSSQL: jdbc:JTurbo://host/instance/sql70=true/charset=Cp1252 ORACLE: jdbc:oracle:thin:@host:port:instance DB2UDB: jdbc:db2://host:port/instance
dbVendor	All	The database you are using. MSSQL, ORACLE or DB2UDB
dedupAllowDirtyReadMSSQL	DES	(*MSSQL only*) Specifies whether to allow dirty read on the PS_RY_BASIC_IND table during de-duping. The default value is false. When the parameter is set to false, the de-duping process gets clean data, but can block other components from updating the basic's individual table. When it is set to true, 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 deduping on BO_ID (Unique System ID) and at least one of the audiences is of type Contact. The default value is true.

Parameter Value	Components	Description
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 like “DD/MM/YYYY”
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 200.
DefaultTimeFormat	All	Default Time format. Possible values are: “HH:MM” or “HH:MM AM/PM”
defaultURLBase	DES/Mailcaster	Specifies the base of the URL that the Campaign Server and Mailcaster adds to all links. The format is: defaultURLBase=<URL of online dialog webserver>
delayForDBCheck	DES	The number of seconds DES waits before attempting a database connection, to prevent it from starting before the database is available. This parameter applies only at database initialization. The default is 15 seconds.
directURLBase	DES	Direct URL of the DES (http://<hostname>:port)
domainName	DES/Mailcaster	The domain name, which identifies your site on the internet. For Online Marketing, this is yourdomain.domain.
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 “true” then new contacts will not be contacted through bulk email. If it is “false” (the default) then contacts may be contacted. This default value can be overridden by the dialog process or respondent input.
doNotEMailProfileElementName	DES/Mailcaster	For internal use only.
errorFileSeverityThreshold	All	The error log severity level.
eventWireGifFileName	DES	Cutomize the DES default 1x1 clear gif file.
extensionsDir	DES/Mailcaster	The directory where the Live Extension servlet jar files exist.
extensionTimeout	DES	Extension execution timeout
heartbeatInterval	DES	Lifecycle management heartbeat interval
https	DES	Indicates whether connections to the Control Center must be secured. If you want to require secure connections, you must set https=On. Any other value (including “on” with a lowercase *o*) indicates that secure connections are not required.

Parameter Value	Components	Description
httpSessionTimeoutMins	DES	The logged in session time out in minutes in the range of 1 to 60mins
jpmWaitForShutdownInMinutes		Delay from last action when the Java Process Monitor will shut it self down.
isDebugOutputToHTMLEnabled	DES	For internal use only.
jmsContextFactory	DES	JMS Context Factory
jmsProvider	DES	Possible values are: BEA-WLS or IBM-WAS
jmsProviderUrl	DES	JMS Provider URL
jmsQueueConnection	DES	JMS Queue Connection
jmsServiceLocator	DES	JMS Service Locator
jmsTopicConnection	DES	JMS Topics Connection
jmsUser	DES	JMS User
jmsUserPassword	DES	JMS User Password
jdbcDriver	DES/Mailcaster	This is the JDBC driver that the Online Marketing components use to access the database. Default values are: MSSQL: com.microsoft.sqlserver.jdbc.SQLServerDriver ORACLE: oracle.jdbc.driver.OracleDriver DB2UDB: com.ibm.db2.jcc.DB2Driver
jobRecoveryExpireInHours	Mailcaster	The time period, in hours, after which mailjobs 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	The number of requests for which the Jolt NetSession will be reused before it is closed. After a Jolt NetSessions is closed, a new one will be created as needed. The default value is 0, meaning that Jolt NetSessions never expire.
largeJobOnly	Mailcaster	Only run large jobs (should be in per mailcaster config file)
localHostName	DES/Mailcaster	Used in communicating with the SMTP mail server(s). It should be the host name of the machine where the Mailcaster is running.
logBaseName	All	The prefix for log and error files, like "DCS", "WDG", etc. (should be in per application config file)
logPath	DES/Mailcaster	Specifies the directory for the log file. The default is the current working directory.

Parameter Value	Components	Description
numberFrequencyCheckThreads	Mailcaster	The number of threads to use to process frequency counter checking.
numberRenderingThreads	Mailcaster	Number of rendering threads
mailCasterMaxGettransactionRetry	Mailcaster	Number of times to attempt to get a DB transaction (connection) before giving up
maxBulkMailMessagesPerHour	Mailcaster	When Online Marketing components are sharing a mail server with other users, you might want 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	The number of DES servers in the cluster.
maxMailQueueSize	Mailcaster	The size of the mailcaster internal message queue
maxFrequencyCheckQueueSize	Mailcaster	The maximum size to allow the queue of messages awaiting the frequency counter checking to grow to.
maxJobSize	Mailcaster	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	Defines the maximum number of log files to create. The default setting is 10.
maxLogFileSize	DES/Mailcaster	Defines the maximum size of the log files in bytes. The default setting is 10 MB.
maxPooledGenericThreads	DES	Maximum number of Generic Threads that are used by Scheduler and Broadcaster
maxRenderMailQueueSize	Mailcaster	Max number of messages in the rendering queue
maxRetriesForDBCheck	DES	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	Max number of mails in the send queue
maxThreads	DES	The max size of the Live Extention pool
maxUploadSize	DES	Maximum file upload size
minJobSize	Mailcaster	The minimum size for a child mailjob. The default value is 2000, and the parameter must be set to a value greater than 0 and less than maxJobSize.
OMKDESDestination	DES	JMS Destination (TOPIC/QUEUE) for DES

Parameter Value	Components	Description
percentageJobSize	Mailcaster	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 how often, in minutes, 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: preloadCampaign=Dialog1,dialog 2,Dialog33 for Staging You can specify multiple dialogs by separating their names (including spaces) with commas; do not include spaces before or after the commas.
psAppServerURL	DES	Specifies the URL of the PeopleSoft Application Server and JOLT port where publish/subscribe is enabled. For failover, you can use a comma-separated list. For example://mymachine1:9000,//machine2:9050 This parameter is usually set in the Online Marketing Client's Settings.
psIBLocalNode	DES	Specifies the name of the Integration Broker default local node for the Application Server.
psIBLocalNodePassword	DES	Specifies the password (if any) for the 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. Choose a user ID with the 'PeopleSoft Administrator' role, such as the 'OLM' user.
psOperatorPassword	DES	Specifies the PeopleSoft user password.
psPIAServerURL	DES	CRM PIA Server URL http:// <PIA web server:port>
psPIAServerWebsiteName	DES	CRM PIA server website name
psToolsRel	DES	Specifies the PeopleTools version number. The default value is 8.45, which is specified in the Online Marketing Client's 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.

Parameter Value	Components	Description
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	Number of jobs that can be run per scheduler wake-up
schedulingTimeoutMins	DES	The maximum value is 30mins and the minimum is 5 mins. If any event is being scheduled i.e. the state is SCHG (scheduling) for more than the set value, then the scheduler recovers this events and re-sends for processing.
signatureAlgorithmKey	DES/Mailcaster	Specifies the encryption algorithm key used for the magic number. The key must be between 15 and 2^63 digits. If the key is not set, or is set incorrectly, a default value is used.
signatureLength	DES	Specifies the length of the signature in bits, from 0 to 48 (0 = no signature). The default length is 48.
smallAudienceThreshold	DES	Specifies a threshold number of contacts in an audience. Below this number, Online Marketing uses a small Mailcaster to send email. The default is 100.
smallAudienceThreshold	Mailcaster	If the maxJobSize is larger than the smallAudienceThreshold, the Mailcaster will work on large jobs as its first priority. If the maxJobSize is less than or equal to the smallAudienceThreshold, the Mailcaster's priority will be small jobs.
smallJobOnly	Mailcaster	Specifies whether the Mailcaster will only try to process small jobs (jobs below the threshold set by the smallAudienceThreshold parameter). If set to True, the Mailcaster will only process small jobs. This parameter is ignored if the maxJobSize parameter is greater than or equal to the smallAudienceThreshold parameter.
smtpServerNames	DES/Mailcaster	Specifies a semicolon-separated list of SMTP mail servers that are used by the Online Marketing server and the Mailcaster. It has the following format: *hostName*[:*portNumber*] [:threads=*n*][;...] The normal SMTP port number is used if `portNumber` is not provided. `threadCount` is used only by the Mailcaster to determine how many internal threads will be used to send mail to smtp server. Examples:

Parameter Value	Components	Description
		• mail1.pscrm.com Uses one mail server on mail1.pscrm.com • mail1.pscrm.com;mail2.pscrm.com Uses two mail servers, one on mail1.pscrm.com and the other on mail2.pscrm.com. • mail1.pscrm.com:1025;mail2.pscrm.com:1025 Uses two mail servers on port 1025, one on mail1.pscrm.com and the other on mail2.pscrm.com • mail1.pscrm.com:threads=5 Uses five connections to mail1.pscrm.com. • mail1.pscrm.com:25:threads=5; mail2.pscrm.com:25:threads=3 Uses five connections to mail1.pscrm.com on port 25 and three connections to mail2.pscrm.com on port 25.
smtpThreadPollingInterval	Mailcaster	Specifies how long in minutes the Mailcaster's threads wait before reconnecting to the SMTP server after being disconnected. The default is 10 minutes.
threads	Mailcaster	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 are1 through 60.
transactionPoolMaxSize	DES/Mailcaster	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.
transactionPoolMinSize	DES/Mailcaster	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	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 true and false; the default value is true.
uploadInMemorySize	DES	Location of temporary storage for uploaded files
uploadTempStorage	DES	Sets the size threshold beyond which upload files are

Parameter Value	Components	Description
		written to the temporary disk storage location.
useJoltRetry	DES	Tell netSession API to use Jolt retry. By default, it is false. It is recommended not to be modified.
loops	Watchdog	Number of times watchdog will run loop. A 0 (zero) means indefinitely. The default is 0.
debug	Watchdog	Enable watchdog specific debugging. Values are YES or NO
service	Watchdog	Write debug information to a log file or the screen. Values are YES to write to a log file or NO to write to the screen.
interval	Watchdog	Number of minutes Watchdog sleeps between running system check. Default is 30 minutes.
timeDifference	Watchdog	Waiting time for Watchdog in milliseconds between launching of 2 series of tests. Default is 1000 milliseconds.
sockeTimeOut	Watchdog	Number of seconds before Watchdog stops waiting for a response on a socket. Timeout of 0 will never timeout a connection. The default is 60 seconds.
ping	Watchdog	Enable ping test in watchdig. The ping validation tells if a host is alive. Values are YES or NO. Default is YES.
pingCommand	Watchdog	The “ping” command for the system. Command should use full path and not assume the use of the “PATH” variable.
machinesToPing	Watchdog	A colon (:) delimited list of machines to “ping”. All needed servers (i.e. database servers, mail servers, etc.) should be included on the list.
pingOkString	Watchdog	The beginning text of a successful response from the ping command. By default “Reply from” is used.
pingMax	Watchdog	The number of times Watchdog will attempt to ping a server before giving up. The default is 20.
pingWait	Watchdog	The number of milliseconds between consecutive ping commands. The default is 15000 milliseconds.
pingTimeoutValue	Watchdog	Number of milliseconds ping will wait for a response (timeout done by ping command). Default is 30 milliseconds.
pingTimeoutCommand	Watchdog	Argument to pass to ping command to specify a timeout. On Win/NT, this should be “-w” to make the used ping command “ping –w 30 hostname”. On Unix, do not set this value.
pingTimeoutCmdPosition	Watchdog	Relative position of the ping timeout to the host name. Values are “front” or “rear”. On Win/NT use “front” for “ping –w 30 hostname” and on Unix use “rear” for “ping

Parameter Value	Components	Description
		hostname 30”
demoCampaignMagicNumber	Watchdog	The magic number of the Online Marketing Dialog to use as test that the DES is running properly. This should include the “p=” along with the magic number. A good demo campaign contains a landing page and a final page.
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 submitting of the landing page.
queryToSubmit	Watchdog	A URL encoded query watchdog will send to the web server. This would include form fields from the demo dialog’s landing page. A value would be something like “First$Name=foo&Last$Name=bar&johnDrake=xxx”
maxMemorySize	Watchdog	The max memory setting for the DES server (i.e. the –Mx Java command line argument used). Values can end in a “G” for gigabytes, “M” for megabytes, “K” for kilobytes or nothing and bytes are assumed (i.e. “64M”).
memoryAlertPercentage	Watchdog	The percentage of max memory used before sending a sending a warning. For example, if set to “50” and the maxMemorySize were 64M, then memory use over 32Meg would register as a failure.
showMemoryUsageInErrorMsg	Watchdog	Show memory use in watchdog report. Values are YES or NO. Default is NO. While more informative, it will cause 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.
domainName	Watchdog	The domain name of the machine running watchdog. An example would be “abc.com”
defaultSender	Watchdog	The Sender to user on Watchdog mail reports.
defaultRecipient	Watchdog	Recipient to use when testing mail server.
defaultHostName	Watchdog	The name of the machine Watchdog is running on.
rmi	Watchdog	Specify if Watchdog should use RMI to check mailcaster process status.
rmiPort	Watchdog	The port to use for RMI connections to the mailcasters. Default is 1099.
returnPath	Watchdog	The return path for Watchdog reports. It should be a valid mailbox, as bounced mails will come to this address.
iAmAliveMailList	Watchdog	A semicolon separated list of email addresses to send “I am

Parameter Value	Components	Description
		Alive" messages to. The I am alive message is to track that even if no error reports are being sent, watchdog is still running.
iAmAliveInterval	Watchdog	Time between I am alive messages.
iAmAliveSubject	Watchdog	The subject line to use for I am Alive messages.
mailMax	Watchdog	The maximum number of attempts to send a report before giving up. Default is 5.
logFileMaximumSize	Watchdog	The maximum size of a log file before rolling over. Values can end in a "K" or "M" to denote kilobytes or megabytes.
numberOfBackUps	Watchdog	The number of backup log files.
runningEventMinusMinutes	Watchdog	The maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
runningEventMinusHours	Watchdog	The maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
runningEventMinusDays	Watchdog	The maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
queuedEventMinusMinutes	Watchdog	Specify 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.
queuedEventMinusDays	Watchdog	Specify the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
mailJobLastModifiedSeconds	Watchdog	Specify the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). House, Minutes and Seconds are added up.
mailJobLastModifiedMinutes	Watchdog	Specify the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). House, Minutes and Seconds are added up.
mailJobLastModifiedHours	Watchdog	Specify 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.

Parameter Value	Components	Description
queuedMailcasterMinusMinutes	Watchdog	Specify the maximum duration a mail job should be in a queued state. Days, Hours and Minutes are added up.
queuedMailcasterMinusHours	Watchdog	Specify the maximum duration a mail job should be in a queued state. Days, Hours and Minutes are added up.
queuedMailcasterMinusDays	Watchdog	Specify the maximum duration a mail job should be in a queued state. Days, Hours and Minutes are added up.
daysInThePast	Watchdog	The period of time Watchdog should monitor failed/stopped jobs and events
mailSendOutRate	Watchdog	The mailcaster send rate in mails per minute. If a mailcaster falls below this threshold a warning is given.
mailSendOutRateCheckInterval	Watchdog	Interval in minutes for running the mailSendOutRate. This value must be an even multiple of the "interval" parameter. For example, if interval=30, then this needs to be 30, 60, 90, etc.
maxTargetListDedupTime	Watchdog	Max time in minutes for a dedup to run. This value must be an even multiple of the "interval" parameter. For example, if interval=30, then this needs to be 30, 60, 90, etc.
sentOverQueuedRatio	Watchdog	Check for number of mails sent VS mails queued. This is used like "SentMessages < sentOverQueuedRatio * QueuedMessages". Due to bad email addresses, the number of mails sent should always be lower than that queued. However, a very high discrepancy may be a warning of poor data integrity or of failing mail servers.
qkLookPort	Watchdog	The port number Watchdog will use for the "quick status report". The default is 6700. To get the report, open a connection from a browser to the URL http://<host>:<qkLookPort> (i.e http://foo.abc.com:6700). This will return a copy of the last report sent. It will also wake the watchdog if it was sleeping to run the validation again.
useAutoUndoOracle	DES/Mailcaster	Boolean flag to indicate whether the Oracle database is in automatic undo mode or not. The default value is false.

C H A P T E R 5

INSTALLING PEOPLESOFT ENTERPRISE ORDER CAPTURE SELF –SERVICE 8.9

This chapter explains the additional installation steps necessary for setting up the PeopleSoft Enterprise Order Capture Self-Service/PeopleSoft Internet Architecture. These instructions assume that you have already installed and configured a PeopleSoft Enterprise CRM 8.9 database following the instructions in Chapter 1 of the *PeopleSoft Enterprise CRM 8.9 Supplemental Installation Guide*.

Note. Before proceeding with your installation, check My Oracle Support to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 8.9 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook*.

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 5-1	Define the Guest User
Task 5-2	Disable “new window” URL

Before You Begin

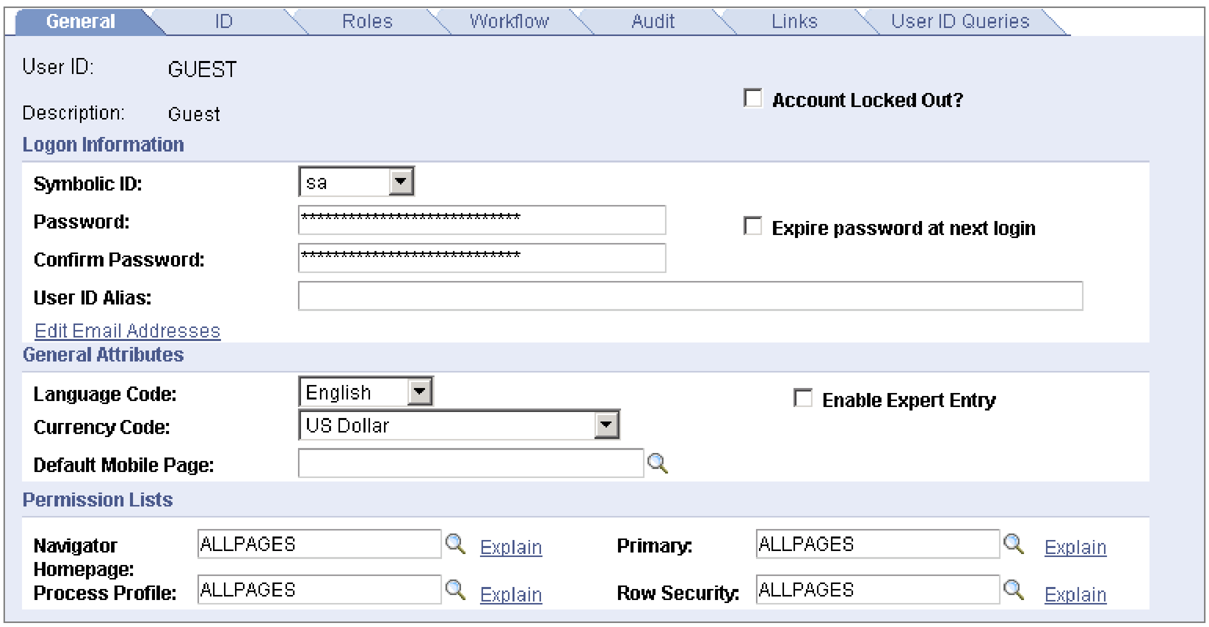
PeopleSoft Order Capture Self-Service is an externally facing application; therefore PeopleSoft recommends that you implement Order Capture Self-Service on separate web and application servers from your other internally facing

PeopleSoft enterprise applications. This provides improved performance, increased security and less downtime for your web site.

PeopleSoft Order Capture Self-Service does not use the standard 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 document). The guest user ID determines the default language and business unit for your site. The guest user must be defined and assigned the following roles:

- Guest
- PeopleSoft Guest

We deliver a sample *GUEST* user profile as an example:

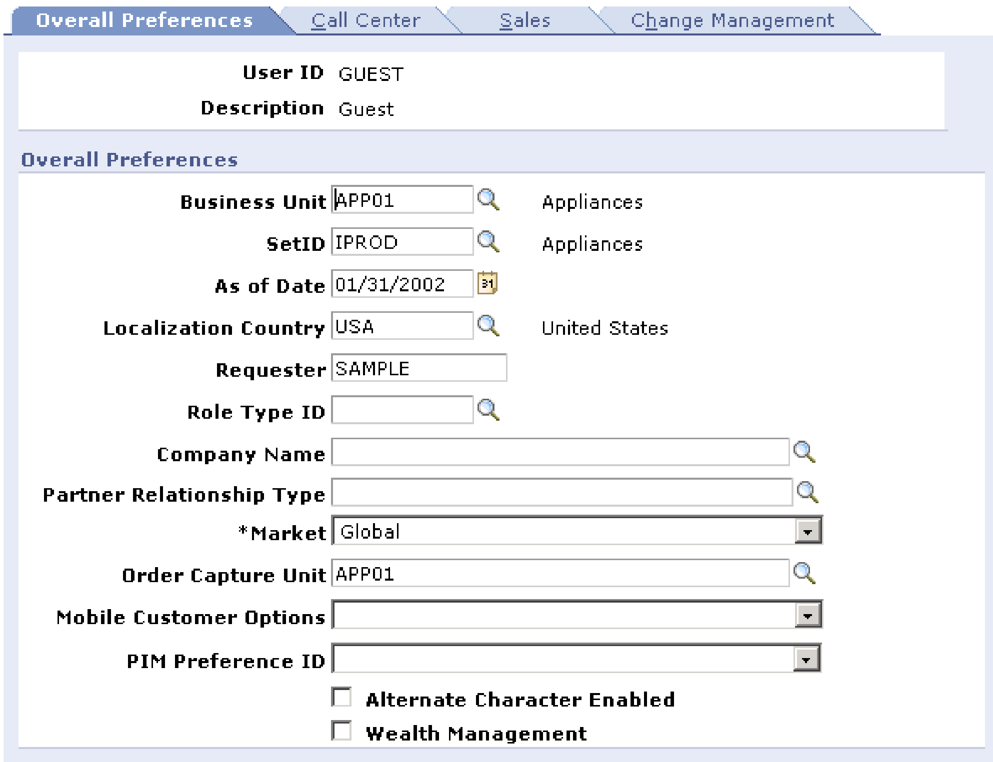


User Profile page

Understanding the Guest User Role

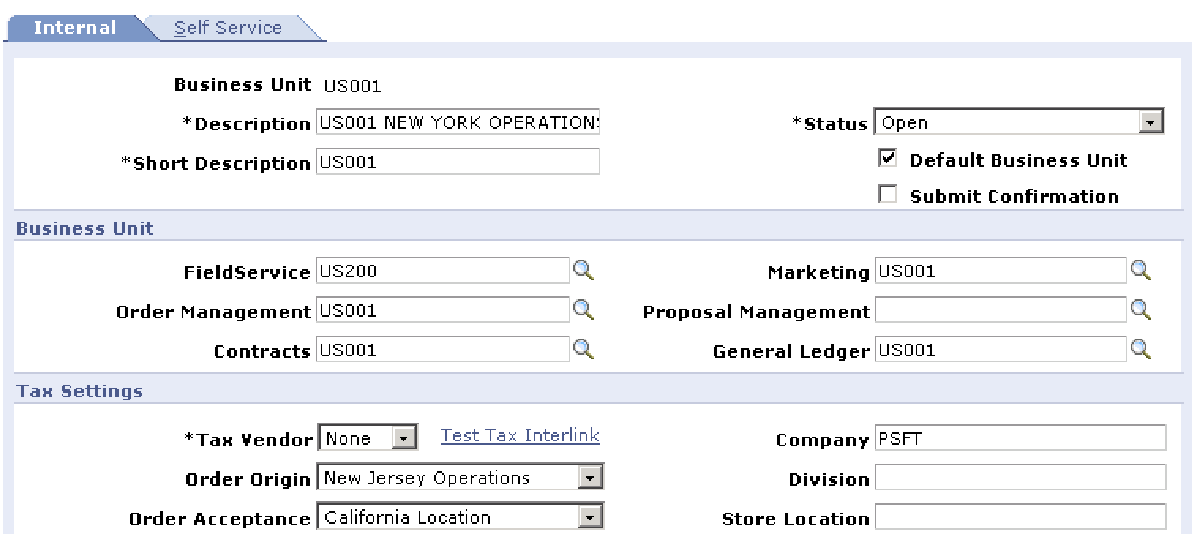
The guest user definition determines the default language and business unit used on your site. You select the Language Code on the User Preferences General page.

The business unit is defined on the Overall Preferences page, under **Set Up CRM, Security, User Preferences**. This Business Unit must be a valid Order Capture Business Unit.



Overall Preferences page

If there is no business unit defined on the Overall Preferences page, the default business unit is determined using the Default Business Unit flag set on the Order Capture Business Unit definition page:



Business Unit page

> **Note**. For more information regarding the User Preferences set up, see *PeopleSoft CRM Applications Fundamentals 8.9 PeopleBook*, “Setting Up Security.”

Understanding the Homepage URL

The URL of your Order Capture Self Service homepage depends on a number of factors. This is a breakdown of the components of the URL:

```
http://<servername>/psp/<site>/<portal>/<node>/h/?tab=DEFAULT
```

- **ServerName** This is your server’s name. For example, www.mycompany.com
- **Site** This is the name of the web server site name you defined when installing PeopleTools.
- **Node** This is the local portal node.

For example, if you accepted all of the defaults when installing PeopleSoft Order Capture Self-Service, your URL would look something like this:

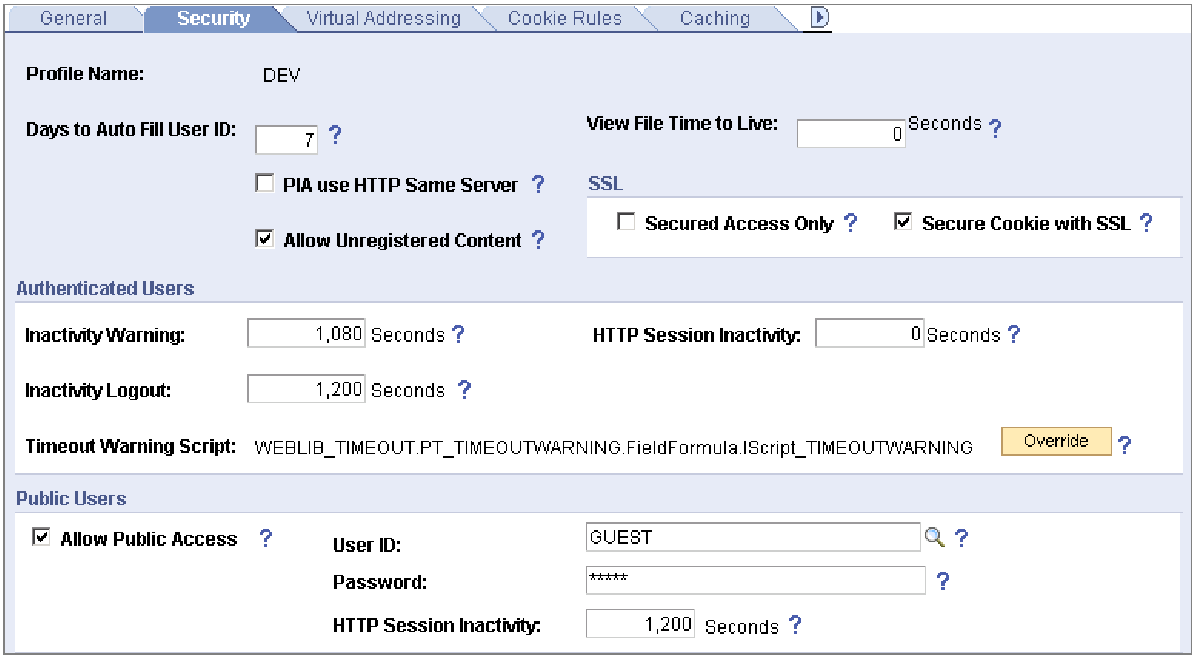
```
http://www.servername.com/psp/ps/CUSTOMER/PSFT_CR/h/?tab=DEFAULT
```

Task 5-1: Define the Guest User

Define the guest user in configuration.properties.

To Define the Guest User in Configuration.Properties:

1. Select **PeopleTools, Web Profile, Web Profile Configuration.**
2. Open the DEV profile definition.
3. Go to the Security tab and locate the Public Users group box.
4. Select the Allow Public Access option.
5. Enter User ID and Password: GUEST
6. Click Save.



Web Profile Configuration – Security page

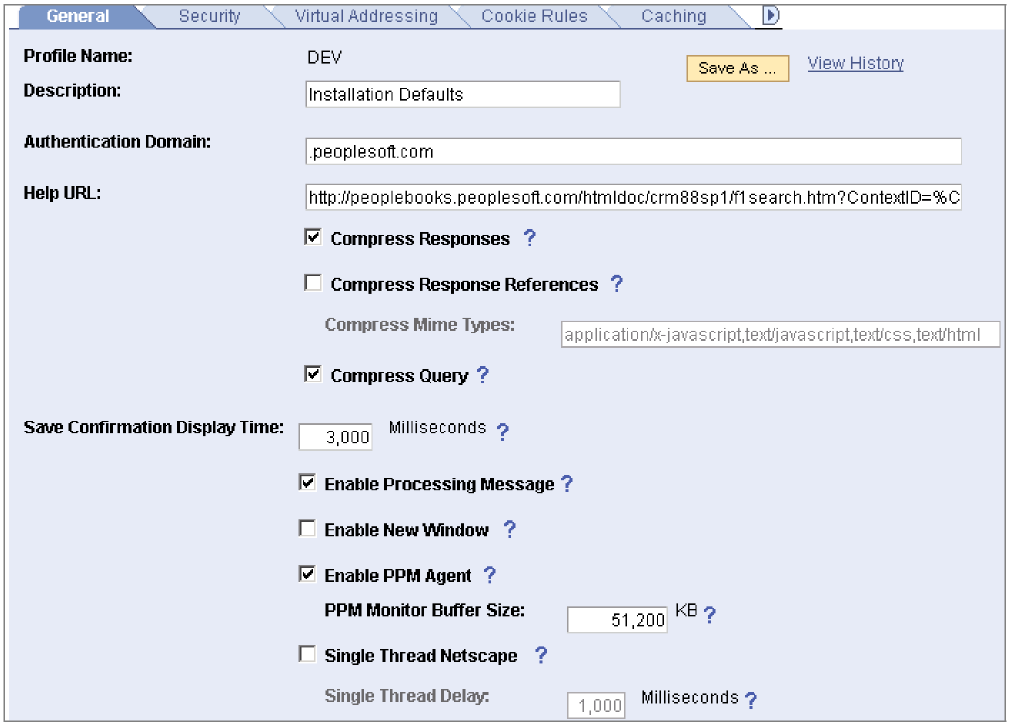
Task 5-2: Disable "new window" URL

You should disable the "New Window" link provided by default on every PIA page. If present, this creates a potential security hole in your application.

To Disable the New Window URL:

Modify the web server configuration.properties file as follows:

1. Select **PeopleTools, Web Profile, Web Profile Configuration.**
2. Open the DEV profile definition.
3. De-select the Enable New Window option.
4. Click Save.



Web Profile Configuration – General page

CHAPTER 6

INSTALLING PEOPLESOFT ENTERPRISE HELPDESK FOR HUMAN RESOURCES—SETTING UP INTEGRATION BETWEEN PEOPLESOFT ENTERPRISE CRM AND HRMS FOR THE HRHD WORKER 360-DEGREE VIEW

This chapter provides instructions for setting up the 360-Degree View EIP. This is used to enable access to the HRHD Worker 360-Degree View from PeopleSoft Enterprise CRM.

Note. Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook*.

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes this chapter's tasks.

Complete Tasks 6-1 through 6-7 if you are running PeopleSoft Enterprise CRM 8.9 with HRMS 8.8 SP1

Task No.	Task Name
Task 6-1	Set Up the URL Gateway for PeopleSoft Enterprise CRM and HRMS
Task 6-2	Set Up a Connector ID for PeopleSoft Enterprise CRM and HRMS Nodes
Task 6-3	Set Up Single Sign-On
Task 6-4	Ping the PeopleSoft Enterprise CRM and HRMS Nodes
Task 6-5	Activate the Message Channel
Task 6-6	Activate Transactions for the PSFT_HR and PSFT_CR Nodes
Task 6-7	Set Up Portal Content Links
Task 6-8	Create the Local CRM Node in HRMS
Task 6-9	Trust Local CRM Node for Single Sign-on in HRMS
Task 6-10	Add AuthTokenDomain to Configuration.Properties in HRMS
Task 6-11	Add the 'CPHD1000' Permission List to the 'Standard Non-Page Permissions' Role in HRMS
Task 6-12	Test XMLLink Services in HRMS
Task 6-13	Reboot HRMS Application and Web Servers in HRMS
Task 6-14	Activate the CRM Messages in CRM
Task 6-15	Load Connectors into Gateway in CRM
Task 6-16	Create XML LINK FOR 360 view Node in CRM
Task 6-17	Create Action Link Node in CRM
Task 6-18	Create HR Local Node in CRM
Task 6-19	Set the Password for CRM's Default Local Node in CRM
Task 6-20	Add Authentication Domain in CRM
Task 6-21	Activate the Link Category Definition in CRM
Task 6-22	Set Up Link Group in CRM
Task 6-23	Copy the HRMS CREF Project in CRM
Task 6-24	Reboot the CRM Application and Web Servers in CRM
Task 6-25	Verify Action Links and HRHD 360 view working in CRM

Complete Tasks 6-8 through 6-25 if you are running PeopleSoft Enterprise CRM 8.9 with HRMS 8.3 SP1 or HRMS 8.0 SP1

Task No.	Task Name
Task 6-8	Create the Local CRM Node in HRMS
Task 6-9	Trust Local CRM Node for Single Sign-on in HRMS
Task 6-10	Add AuthTokenDomain to Configuration.Properties in HRMS
Task 6-11	Add the ‘CPHD1000’ Permission List to the ‘Standard Non-Page Permissions’ Role in HRMS
Task 6-12	Test XMLLink Services in HRMS
Task 6-13	Reboot HRMS Application and Web Servers in HRMS
Task 6-14	Activate the CRM Messages in CRM
Task 6-15	Load Connectors into Gateway in CRM
Task 6-16	Create XML LINK FOR 360 view Node in CRM
Task 6-17	Create Action Link Node in CRM
Task 6-18	Create HR Local Node in CRM
Task 6-19	Set the Password for CRM’s Default Local Node in CRM
Task 6-20	Add Authentication Domain in CRM
Task 6-21	Activate Link Category Definition in CRM
Task 6-22	Set Up Link Group in CRM
Task 6-23	Copy the HRMS CREF Project in CRM
Task 6-24	Reboot the CRM Application and Web Servers in CRM
Task 6-25	Verify Action Links and HRHD 360 view working in CRM

Before You Begin

Before you perform the tasks in this chapter you must have installed and configured a PeopleSoft Enterprise CRM 8.9 database and an HRMS 8.8 SP1, HRMS 8.3 SP1, or HRMS 8.0 SP1 database.

Integration Between CRM 8.9 and HRMS 8.8 SP1

If you are integrating with HRMS 8.8 SP1, complete Tasks 6-1 through 6-7 only.

Integration Between CRM 8.9 and HRMS 8.3 SP1 /HRMS 8.0 SP1.

If you are integrating with HRMS 8.3 SP1 or HRMS 8.0 SP1, skip Tasks 6-1 through 6-7 and go directly to Task 6-8.

Task 6-1: Set Up the URL Gateway for PeopleSoft Enterprise CRM and HRMS

A URL gateway must be set up between the PeopleSoft Enterprise CRM and HRMS systems. In addition, PSFT_CR is delivered local node on PeopleSoft Enterprise CRM, and PSFT_HR is delivered local node on PeopleSoft Enterprise HRMS. The gateway URL defines these two nodes in a gateway property file.

- For PeopleSoft Enterprise CRM with a tools version of 8.45, the gateway URL is located in the following directory:

  {%PS_HOME}\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties

- For PeopleSoft Enterprise CRM with a WebLogic application server, the gateway URL is located in the following directory:

  <%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties

- For PeopleSoft Enterprise CRM with a WebSphere application server, the gateway URL is located in the following directory:

  <%PS_HOME%>\webserv\<cellname_nodename_servername>\<domain.ear>\PSIGW\WEB-INF\IntegrationGateway.Properties

- For PeopleSoft Enterprise HRMS 8.8 SP1 with a WebLogic application server, the gateway URL is located in the following directory:

  C:\bea\wlserver61\config\PeopleSoft\Applications\PSIGW\Web-Inf\IntegrationGateway.Properties

- For PeopleSoft Enterprise HRMS 8.8 SP1 with a WebSphere application server, the gateway URL is located in the following directory:

  C:\WebSphere\AppServer\installedApps\peoplesoft\PSIGW\WEB-INF\IntegrationGateway.Properties

To Set Up the URL for PeopleSoft Enterprise CRM and HRMS systems:

1. Select **PeopleTools, Integration Broker, Gateways** to access the Gateways page in both systems.

2. Search for and choose ‘LOCAL’ gateway. Enter the Gateway URL information on the Gateway page.

3. On the Gateways page, type in the Gateway URL:

   http://<webserver machine name><port>/PSIGW/PeopleSoftListeningConnector.

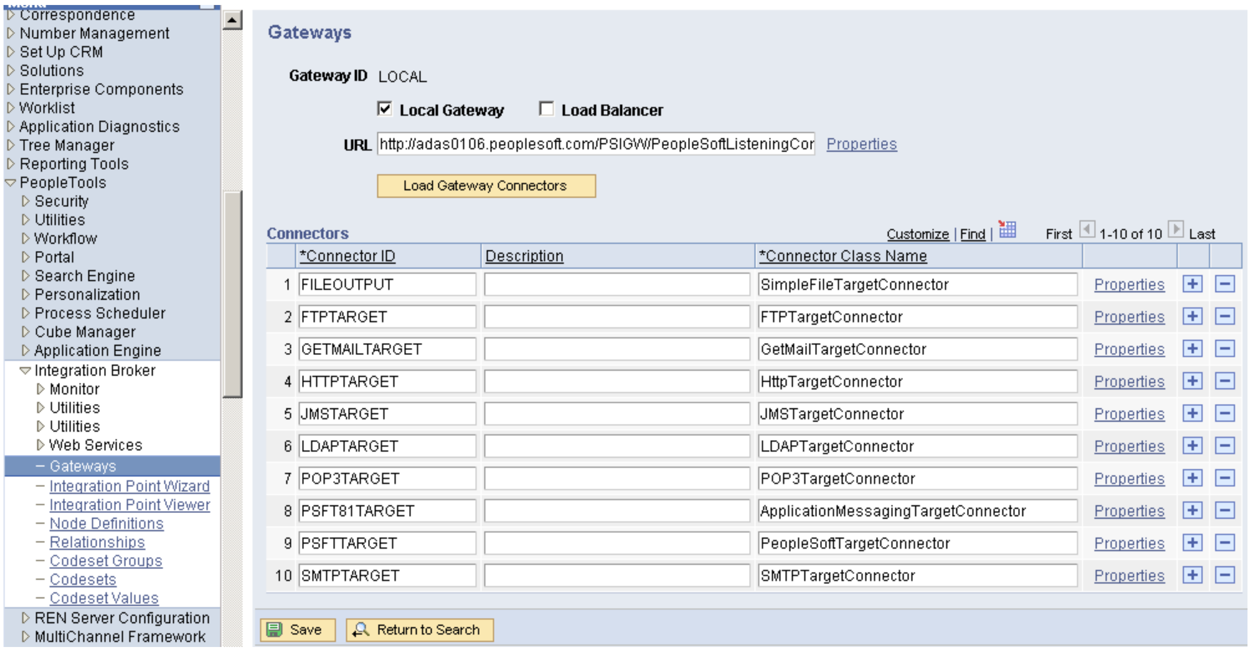
4. Click Save.

5. Click the “Load Gateway Connector” button. You will get a message “Gateway refresh process was successful.”

6. Click OK.

7. Click Save.

The <Web server machine name><port> depends on the machine you set up to access the integration gateway properties file, in which has two nodes defined.



Gateway page

Here is an example of a Properties file with two nodes defined. You need to modify the file 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. In order for it to run on Windows, make sure Java is in your system environment path.

> **Note**. For the WebSphere web server ONLY: Run the setupcmdline.bat before executing PSCipher.bat. This is to ensure java is set properly.

- For PeopleSoft Enterprise CRM 8.9 on a WebLogic web server find the PSCipher.bat under:

  <%PS_HOME%>\webserv\peoplesoft\PSCipher.bat

- For PeopleSoft Enterprise CRM 8.9 on a WebSphere web server, find PSCipher.bat under:

  <%PS_HOME%>\webserv\<cellname_nodename_servername>\<domain.ear>\PSCipher.bat

- For PeopleSoft Enterprise HRMS 8.8 SP1 on a WebLogic web server, the command is located at the WebLogic home directory under config\peoplesoft. The command will return you the encrypted password by passing an original password as input parameter. Copy / Paste the encrypted password into the Properties file.

- For PeopleSoft Enterprise HRMS 8.8 SP1 with WebSphere, the command is located at:

  c:\websphere\appserver\installedapps\peoplesoft\

```
C:\bea\wlserver6.1\config\peoplesoft>PSCipher PS
8T+SA8zGqEM=
C:\bea\wlserver6.1\config\peoplesoft>PSCipher COMPACT
+4/71QsPPlk=
C:\bea\wlserver6.1\config\peoplesoft>_
```

> **Note**. The password encryption utilities - PSCipher will generate different passwords depending on the tools version. PeopleSoft Enterprise CRM 8.9 uses the PSCipher delivered by PeopleTools 8.45 and PeopleSoft HRMS uses the one delivered by its tools release. Otherwise, the following task 6-5 will receive an error - " unable to decrypt password".

Task 6-2: Set Up a Connector ID for PeopleSoft Enterprise CRM and HRMS Nodes

You must set up a connector ID as PSFTTARGET for the PSFT_CR and PSFT_HR nodes in the PeopleSoft Enterprise CRM system. In addition, you must set up the PSFT_HR and PSFT_CR nodes in the PeopleSoft HRMS system.

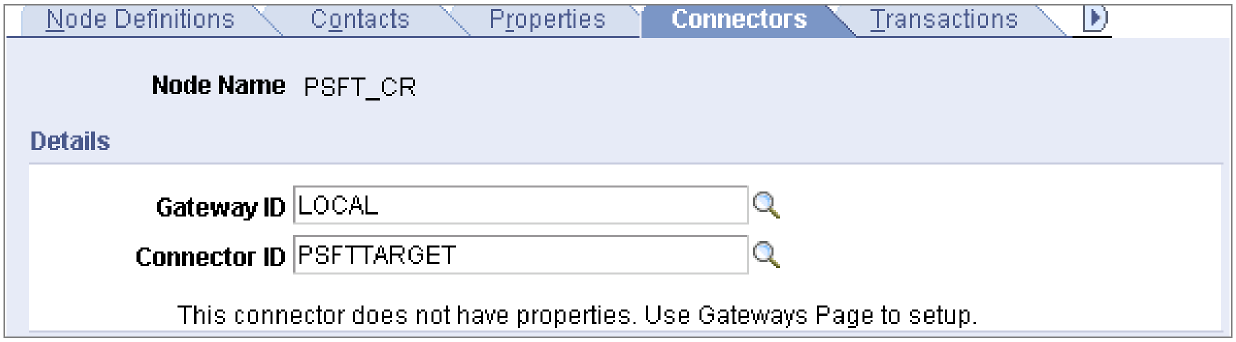
To Define a PSFTTARGET Connector ID for the PeopleSoft Enterprise CRM Nodes:

1. Access the Connectors page and specify PSFTTARGET as the connector ID for PSFT_CR (local node) and PSFT_HR (remote node).

2. Select **PeopleTools, Integration Broker, Node Definitions** in the PeopleSoft Enterprise CRM system.

3. Specify the PSFT_CR node.

4. In the Node Definitions component, select the Connectors tab.



CRM Node Definitions - Connectors page

5. On the Connectors page, enter PSFTTARGET in the Connector ID field.

6. Click Save.

7. Repeat the procedure for the PSFT_HR node.

To Define a PSFTTARGET Connector ID for the PeopleSoft HRMS Nodes:

1. Access the Connectors page and specify PSFTTARGET as the connector ID for PSFT_HR.

2. Select **PeopleTools, Integration Broker, Node Definitions** from the PeopleSoft HRMS system.

3. Specify the PSFT_HR node.

4. In the Node Definitions component, select the Connectors tab.

HRMS Node Definitions -Connectors page

5. On the Connectors page, enter PSFTTARGET in the Connector ID field.

6. Click Save.

7. Repeat the procedure for the PSFT_CR node.

Task 6-3: Set Up Single Sign-On

Integration machines should be set up to support single sign-on so that users do not need to sign on to PeopleSoft HRMS manually when transferring from PeopleSoft Enterprise CRM to 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, Node Definitions** in both PeopleSoft CRM and PeopleSoft HRMS.

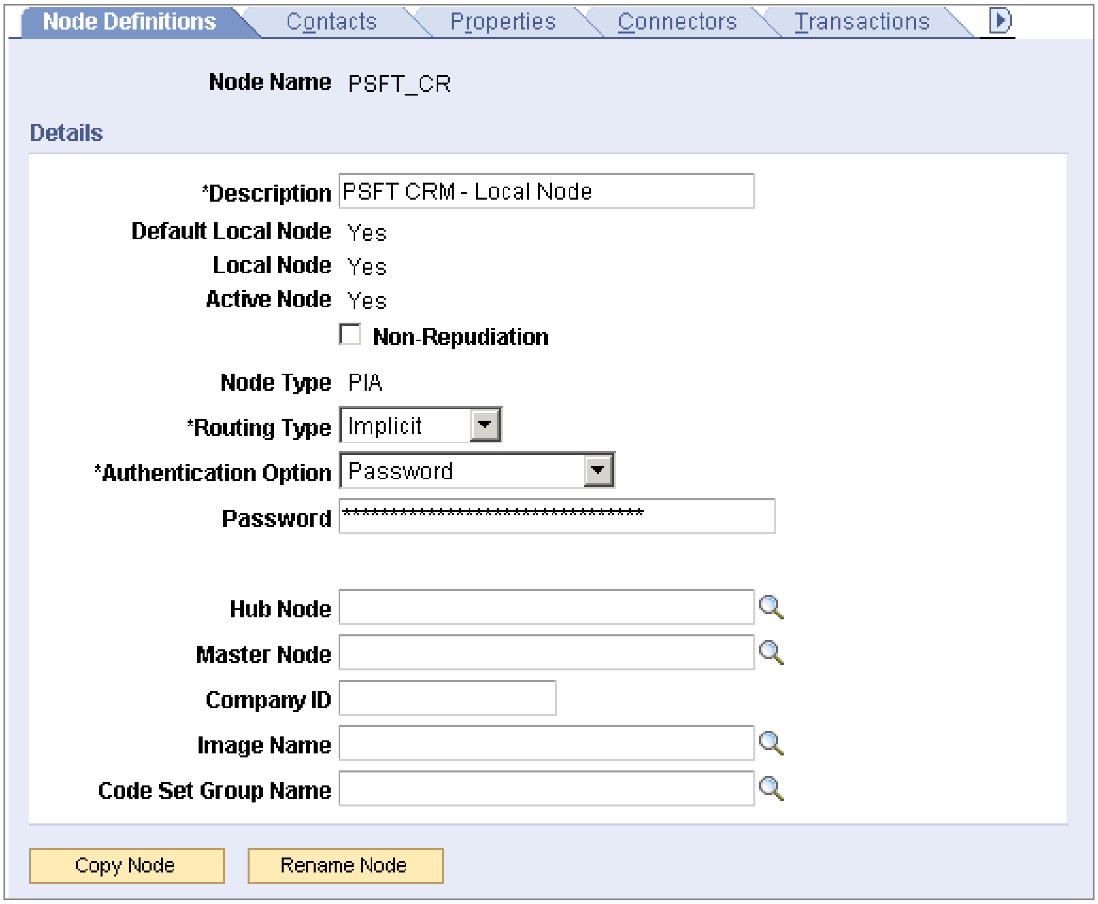
2. Search for an open the PSFT_CR node.

3. Select the Node Info tab.

4. Specify a password authentication option for PSFT_CR node.

   - On the Node Info page in the PeopleSoft Enterprise CRM system, set the Authentication Option for the PSFT_CR node to *Password* and enter an appropriate Password**.**
   - On the Node Info page in the HRMS system, set the Authentication Option for the PSFT_CR node to *Password* and enter the same Password as you did in the PeopleSoft Enterprise CRM system.

5. Click Save.



Node Definitions page

6. Identify the PSFT_CR node as a trusted node for single sign-on in the PeopleSoft HRMS system as follows:

- Select **PeopleTools, Security, Security Objects, Single Signon** to access the Single Sign on page in PeopleSoft HRMS.
- On the Single Sign on page, add the node PSFT_CR to indicate that the node is trusted for single sign-on.
- Click Save.

7. Verify that both the PeopleSoft Enterprise CRM and HRMS web servers are using the correct AuthTokenDomain.

8. For PeopleSoft Enterprise CRM, make sure when you installed tools, specify the correct AuthTokenDomain.

9. If you are using WebLogic or WebSphere, verify that the configuration.properties and cookierules.xml files contain a valid AuthTokenDomain for both the PeopleSoft Enterprise CRM and HRMS web servers.

    - For PeopleSoft HRMS with a WebLogic web server, the files are located at C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\ps

- For PeopleSoft HRMS with a WebSphere web server, the files are located at C:\WebSphere\AppServer\installedApps\peoplesoft\PORTAL\WEB-INF\psftdocs\ps
- For PeopleSoft Enterprise CRM with a WebLogic web server, the files are located in the following directory:

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

- For PeopleSoft Enterprise CRM with a WebSphere web server, the files are located in the following directory:

  <%PS_HOME%\webserv\<cellname_nodename_servername>\<domain.ear>\PORTAL\WEB-INF\psftdocs\ps

10. Re-boot the PeopleSoft Enterprise CRM and HRMS web servers.

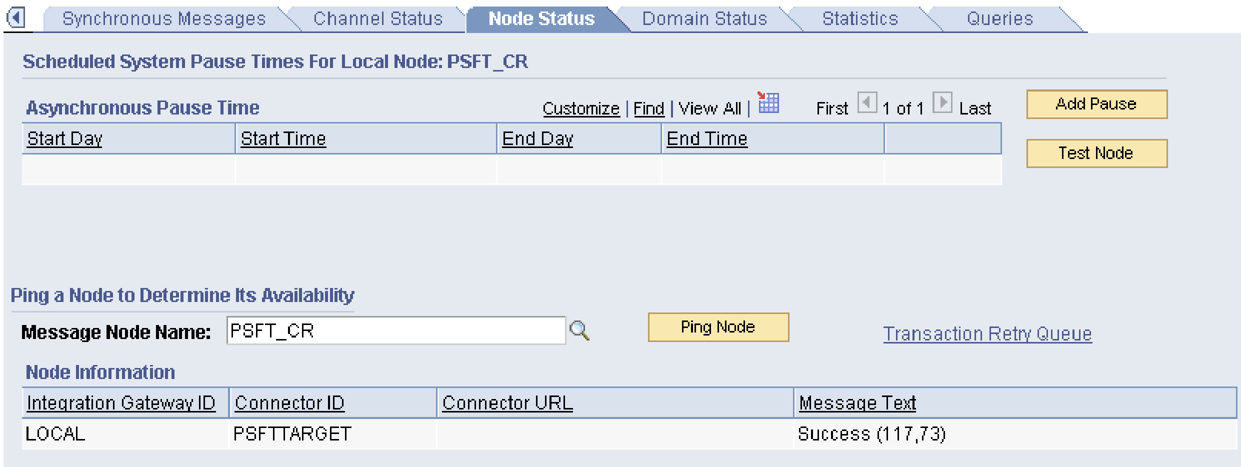
Task 6-4: Ping the PeopleSoft Enterprise CRM and HRMS Nodes

Ping the PSFT_HR and PSFT_CR nodes on both the PeopleSoft Enterprise CRM and 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.
2. Select **PeopleTools, Integration Broker, Monitor, Monitor Message** from both the PeopleSoft Enterprise CRM and HRMS menus.
3. Select the Node Status page.
4. On the Node Status page, select the node name, PSFT_HR or PSFT_CR.
5. Click the Ping Node button. You will see 'Success' in the message text. If not, you need to refer *PeopleSoft Enterprise CRM Integration Broker PeopleBook* to debug.

Note. All previous steps must be followed in order to get successful ping.



Node Status page

Task 6-5: Activate the Message Channel

To Confirm that Channel HD_360_SETUP is Running:

1. Select **People Tools, Integration Broker, Monitor, Monitor Message** to access the Message Monitor in both PeopleSoft Enterprise CRM and HRMS systems.

2. Confirm that channel HD_360_SETUP on Channel Status tab is up running.

3. The Run/Pause button is a toggle button. If the status is Paused, click on Run button. You will see the status change to Running, and the button change to Pause.

To Activate the HR_HELPDESK_360 EIP Messages:

1. The 360-Degree View EIP includes two application messages, Name HD_360_REQUEST_SYNC and HD_360_RESPONSE_SYNC. These messages are shipped inactive. You must activate these messages in both the PeopleSoft Enterprise CRM and HRMS systems.

To Activate the 360-Degree View EIP Application Messages:

1. Sign on to Application Designer, and access the Define Type Message page.

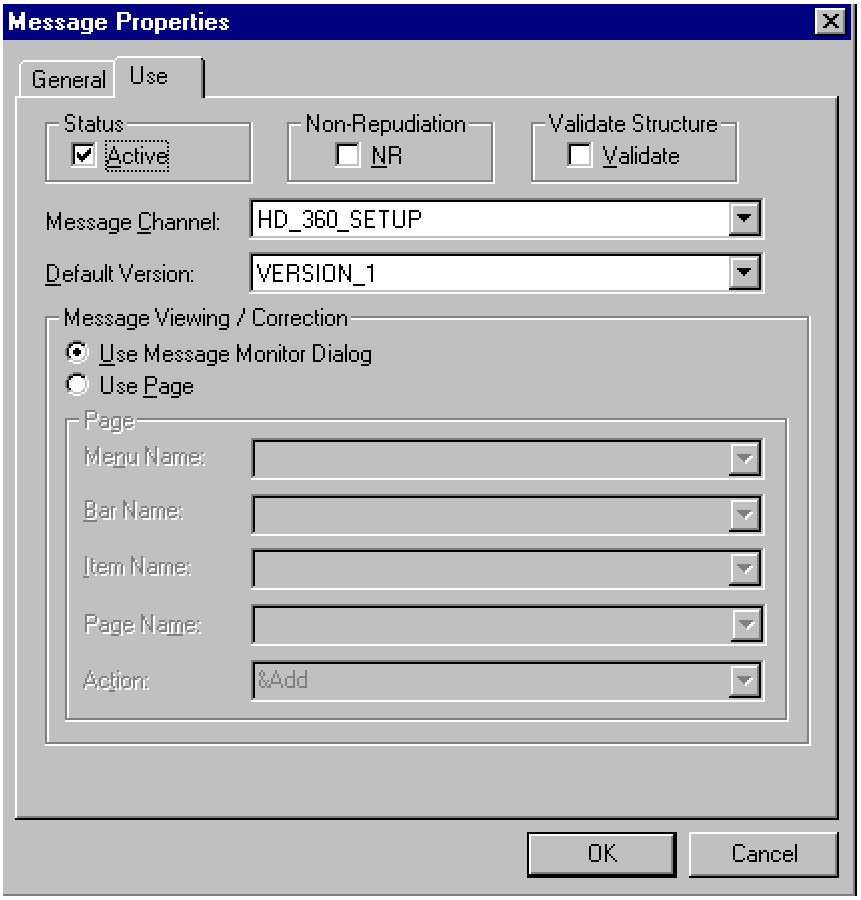
2. Select **File, Open**, and Select Message from the Definition drop down list in PeopleSoft Enterprise CRM or HRMS PeopleTools Application Designer. This enables you to find application message definitions.

   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.

3. Right click on the message and select Message Properties.

4. In the Use tab of the Message Properties dialog, select the Active Status check box and click OK.

5. Save the message definition.



Message Properties page

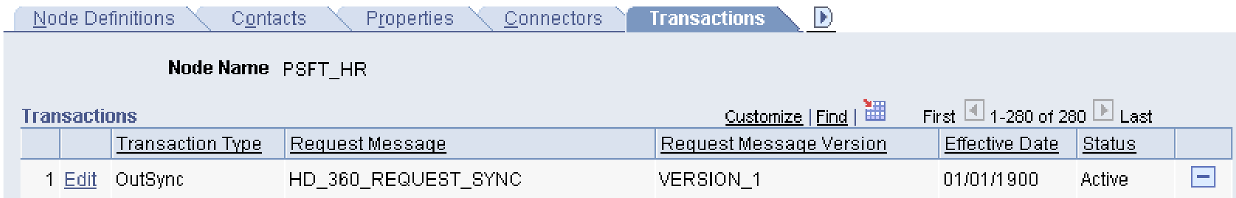
Task 6-6: Activate Transactions for the PSFT_HR and PSFT_CR Nodes

Transactions are defined in the remote node of each system. Activate transactions for the PSFT_HR node in the PeopleSoft Enterprise CRM system, and for the PSFT_CR node in the PeopleSoft HRMS system.

To Activate Transactions for the PSFT_HR Node in PeopleSoft Enterprise CRM:

1. Open the PSFT_HR node definition in the Node Definitions component.

2. Select **PeopleTools, Integration Broker, Node Definitions** and select the PSFT_HR node in PeopleSoft Enterprise CRM.



Node Definitions: Transactions page

Transactions | Messages

Node Definitions - Transaction Detail page

3. Change the status of the HD_360_REQUEST_SYNC message to Active.

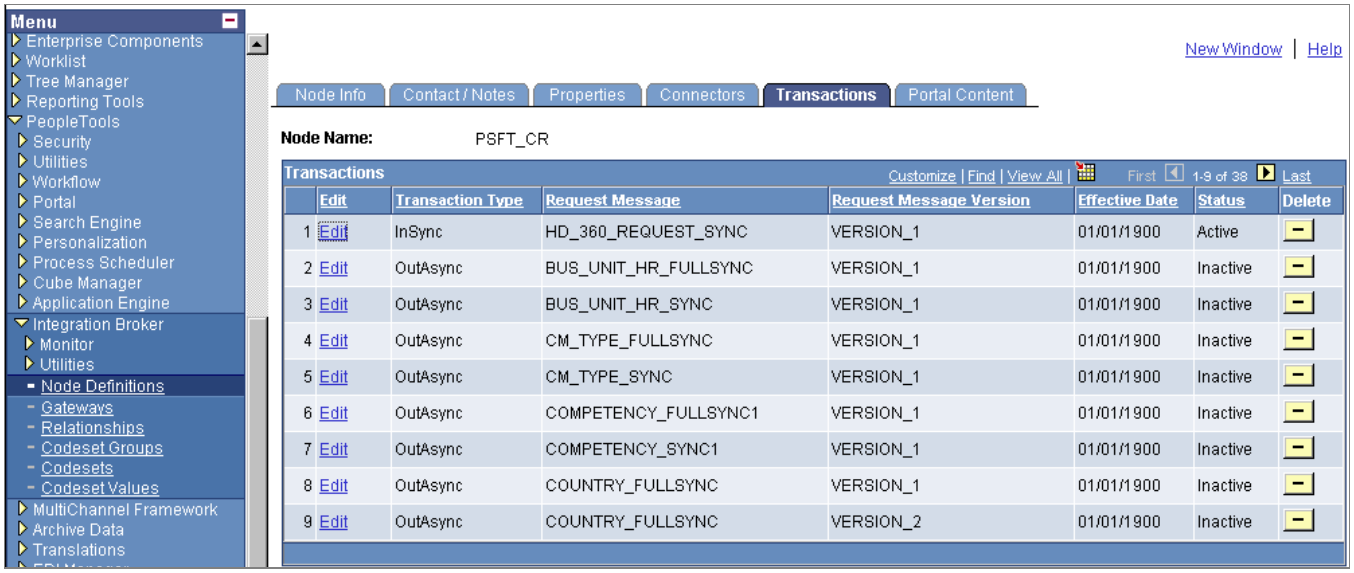
4. Select the Transactions page of the Node Definitions component. Click the Find Link and enter HD_360_REQUEST_SYNC when prompted for a search string in the popup window.

5. Click the Edit link for the HD_360_REQUEST_SYNC message, set to Active, and save.

To Activate Transactions for the PSFT_CR node in PeopleSoft HRMS:

1. Open the PSFT_CR node definition in the Node Definitions component.

2. Select **PeopleTools, Integration Broker, Node Definitions** and select the PSFT_CR node in PeopleSoft HRMS.

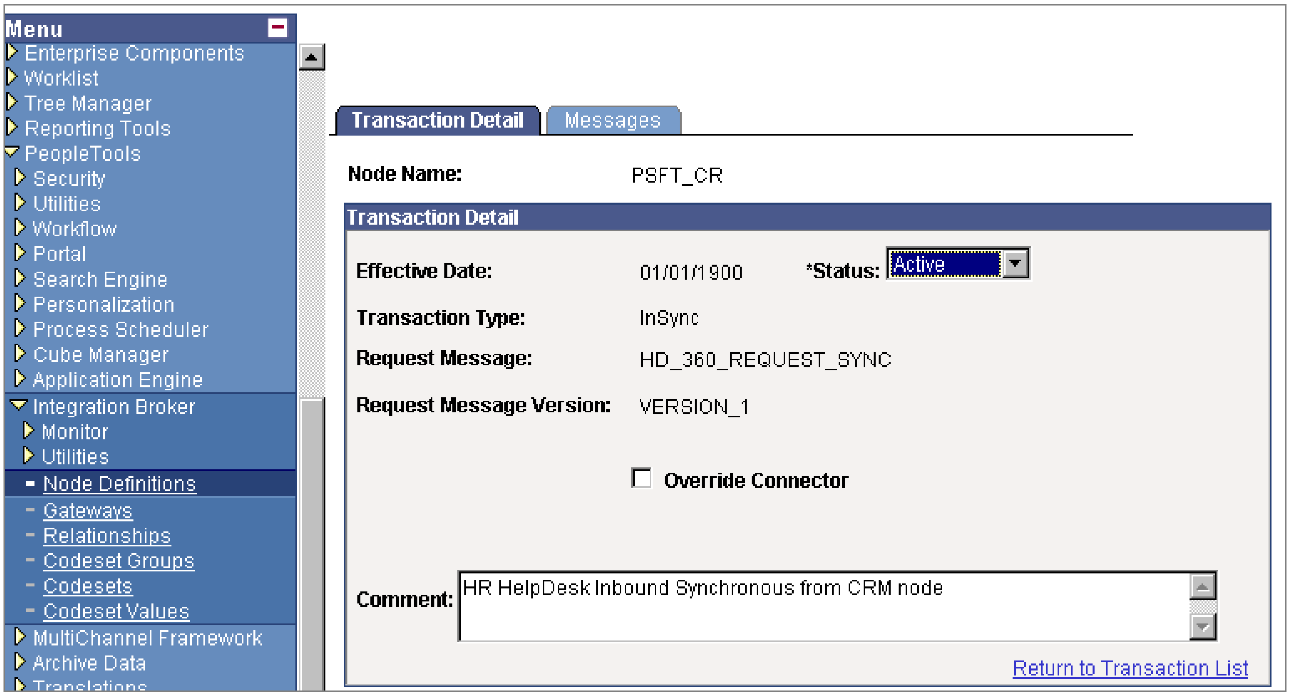


Node Definitions: Transactions page

3. Change the status of the HD_360_REQUEST_SYNC message to Active.

4. Select the Transactions page of the Node Definitions component. Click the Edit link for the HD_360_REQUEST_SYNC message, select status Active, and save.

5. Click OK to accept a related warning message you might get.



Node Definition – Transaction Detail page

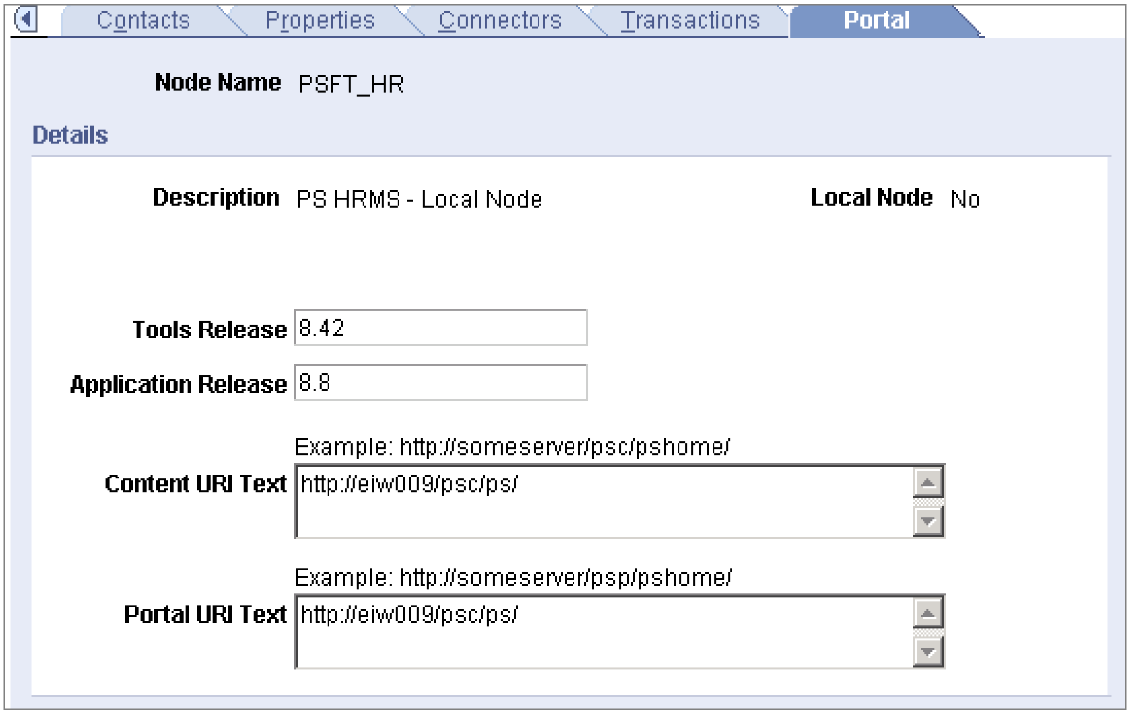
Task 6-7: Set Up Portal Content Links

You must define the portal content in order 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 Enterprise CRM, access the HRMS node in the Node Definitions component.
2. Select **PeopleTools, Portal, Node Definitions** and specify the HRMS node.
3. In the Node definition component, select the Portal tab.

Note. This enables the links on the case page to directly transfer from PeopleSoft Enterprise CRM to HRMS; this must be set up in the Node Definitions under Portal menu folder, not in the Integration Broker folder.



Node Definitions - Portal page

4. On the Portal page, enter the content URI text and portal URI text to define how PeopleSoft HRMS system users will transfer to and from the PeopleSoft Enterprise CRM system.

- 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.

Integration Between PeopleSoft Enterprise CRM 8.9 and HRMS 8.3 SP1 / 8.0 SP1

- If you are integrating with HRMS 8.8 SP1, complete Tasks 6-1 through 6-7 only.
- If you are integrating with HRMS 8.3 SP1 or HRMS 8.0 SP1, perform tasks 6-8 through 6-25
  - Tasks 6-8 through 6-12 are performed on the HRMS database.
  - Tasks 6-13 through 6-25 are performed on the CRM database.

In this document, the PeopleSoft Enterprise CRM instance is C880PCX on machine pcas014 on port 8001 with domain c880pcxnt. The HRMS instance is H831PBX on machine phas006 on port 7201 with domain h831pbxnt. The screenshots are for CRM 8.9 and HRMS 8.3 SP1. The node names may vary depend on your environment setup. The CRM local node is C880PCX and the HRMS 8.3 SP1 local node is H831PBX.

Note: Please apply the following Updates, which are available on Customer Connection, for HRMS 8.0 SP1 and 8.3 SP1 databases. The following Updates must be applied prior to following the steps in this Installation Document.

HRMS 8.0 SP1 - Update ID: 125495

HRMS 8.3 SP1 - Update ID: 125492

Note. The following tasks 6-8 through 6-12 are performed on the HRMS database.

Task 6-8: Create the Local CRM Node in HRMS

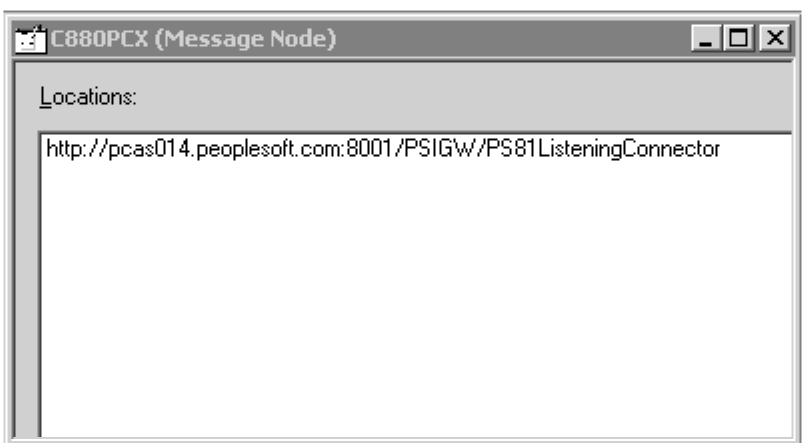
Create the Local CRM Node in HRMS:

Create a new Message Node in the HR database that matches the name of the CRM DEFAULT local node on the PeopleSoft Enterprise CRM database. The example below is if the local node on the CRM side is named 'C880PCX'.

1. Launch Application Designer.

2. Select **File, New, Message Node**.

3. Right Cick on the location area to insert a location.



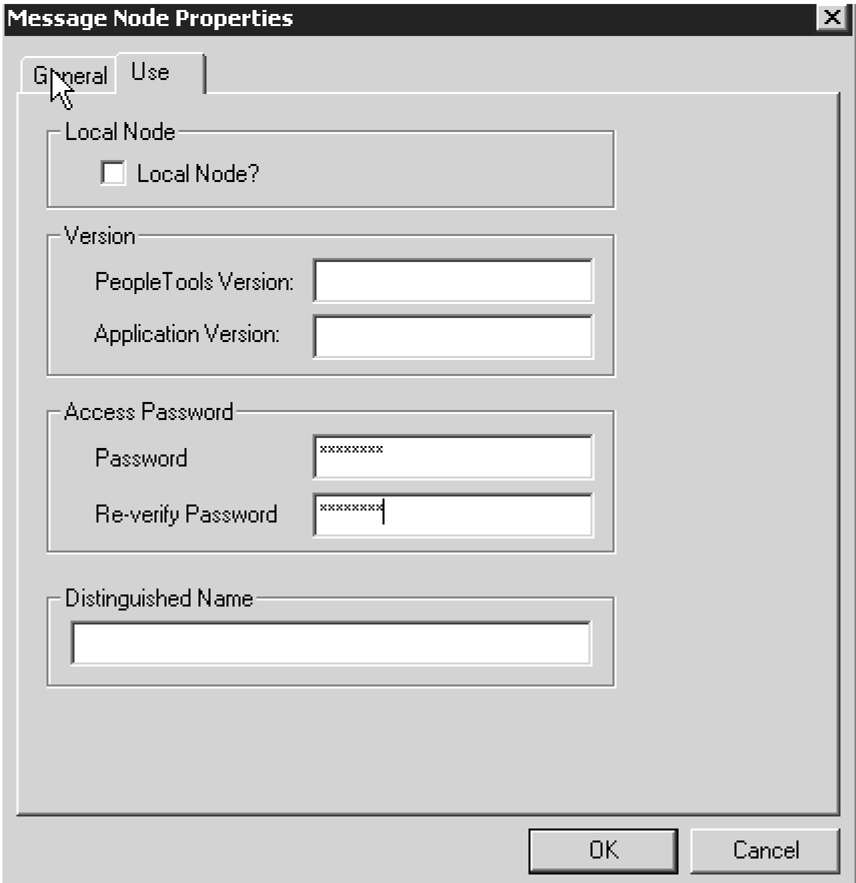
Message Node dialog

4. For the location of this node, insert the URL path to the CRM's integration gateway.

   The format of the location will be as follows: http://servername.peoplesoft.com/PSIGW/PS81ListeningConnector

For example: http://pcas014.peoplesoft.com:8001/PSIGW/PS81ListeningConnector

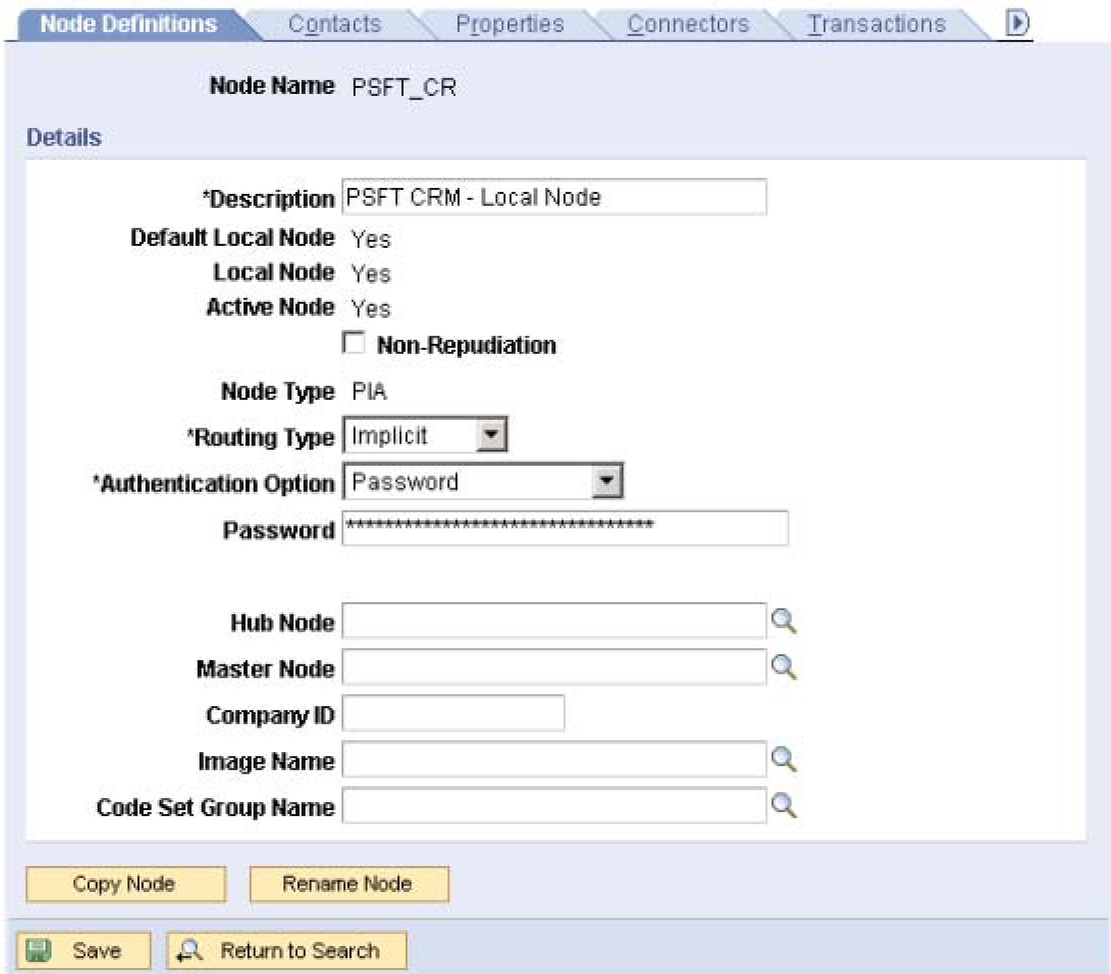
5. Click on properties of the Message Node.



Message Node Properties dialog

6. Enter a password that matches password on CRM side for CRM's DEFAULT local node of C880PCX.

Here is the page in PeopleSoft Enterprise CRM; this password must match the password setup in the HR environment.



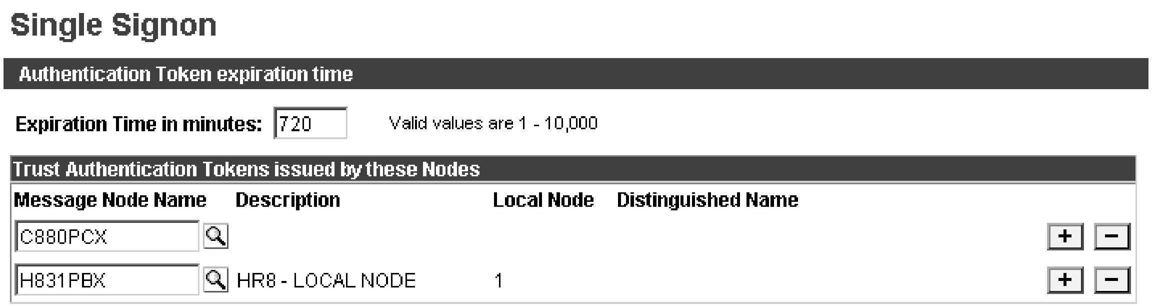
Node Definitions page

Task 6-9: Trust Local CRM Node for Single Sign-on in HRMS

Add the CRM node that was created on the HR database as a trusted domain:

Add the CRM node that was created on the HR database as a trusted domain. This is needed because the HR environment needs to 'trust' the source of the XML Request, which is coming from CRM.

1. Select **PeopleTools, Maintain Security, Setup, Single Signon**



Single Signon page

Task 6-10: Add AuthTokenDomain to Configuration.Properties in HRMS

2. Modify your configuration.properties. If you used the default paths during installation, the default location for the file is located at the following path:

   C:\Apps\weblogic\myserver\psftdocs\peoplesoft8\configuration.properties

   If the default paths were not selected during installation, the file will be located at the following path:

   \\[Webserver]\[PIA instance]\configuration.properties

3. Add the following parameter: AuthTokenDomain = .[domain].com

4. For example: AuthTokenDomain = .peoplesoft.com

> **Note**. Make sure you have the space in front of the period. That space is intentional.

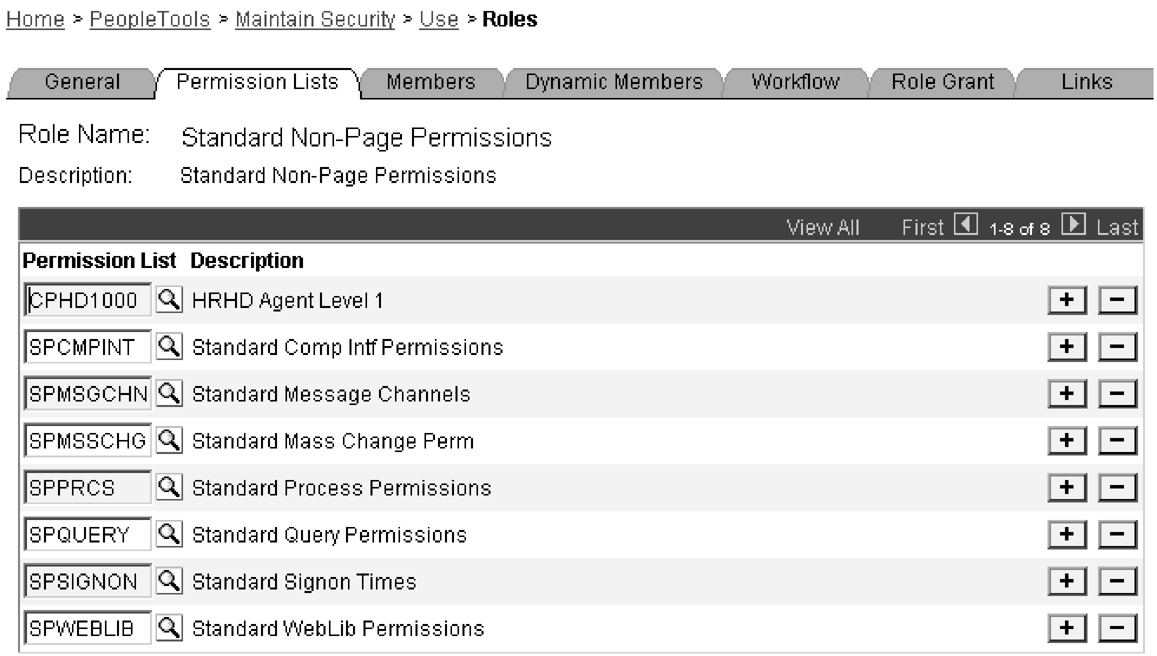
Task 6-11: Add the 'CPHD1000' Permission List to the 'Standard Non-Page Permissions' Role in HRMS

To Add the Permission List:

Add the 'CPHD1000' Permission List to the 'Standard Non-Page Permissions' Role. This permission list is needed to allow users to have access to the WEBLIB_HRMS360 web library when any user attempts to retrieve HRMS data from the CRM Helpdesk 360 view.

1. Select **PeopleTools, Maintain Security, Use, Roles, Update/Display ('Standard Non-Page Permissions'), Permissions List tab**

2. Add the CPHD1000 permission list to the already existing permission lists for the role. Save.



Permission Lists page

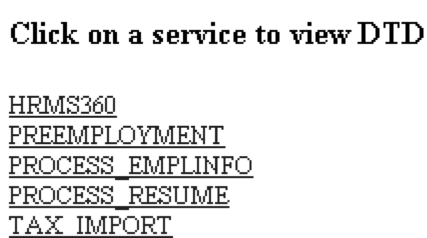
Task 6-12: Test XMLLink Services in HRMS

To Test XMLLink Services in HRMS:

Access the xmllink servlet and check if your service appears in the list. Using the browser, get the URL http://host/servlets/xmllink/PIApath, where host is your server name, and PIApath is the default path for PIA (this is usually peoplesoft8). This will provide the list of registered services.

The format is http://[machinename]:[portnumber]/servlets/xmllink/PIApath/

For example: http://phas006.peoplesoft.com:7201/servlets/xmllink/h831pbxnt/



This display shows that this HRMS360 has been registered as an XML Service.

Task 6-13: Reboot HRMS Application and Web Servers in HRMS

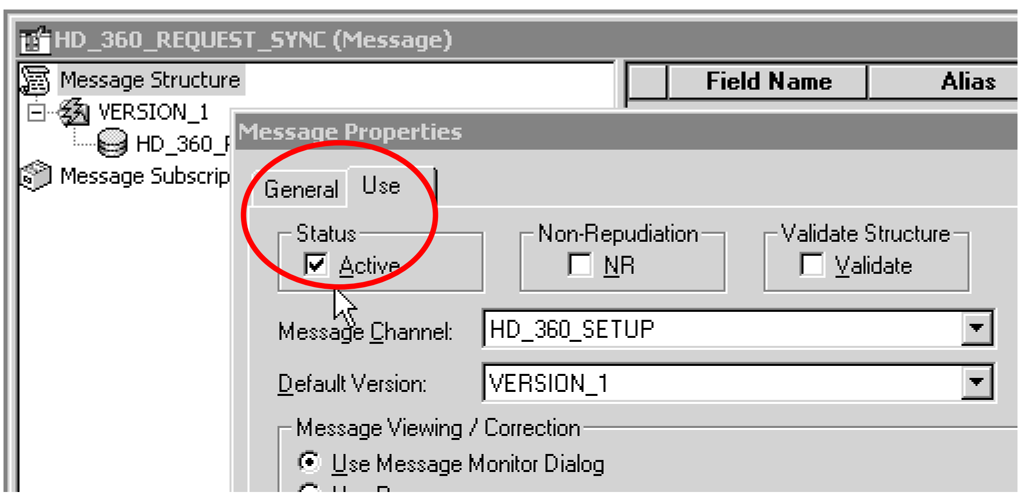
1. Clear the cache and reboot the app server.
2. Reboot the web server.

Note. The following Tasks 6-13 through 6-25 are performed on the CRM database.

Task 6-14: Activate the CRM Messages in CRM

To Activate CRM Messages:

1. Launch Application Designer.
2. Select **File, Open, Message**.
3. Open the HD_360_REQUEST_SYNC and HD_360_RESPONSE_SYNC messages within the CRM database.
4. Click on the properties for each message and navigate to the 'Use' tab.
5. Select the Active option.
6. Click Save.



Message Properties dialog

Task 6-15: Load Connectors into Gateway in CRM

To Load Gateway Connectors in CRM:

1. Load Connectors into the gateway URL = http://<webserver>/PSIGW/PeopleSoftListeningConnector

   For example: http://pcas014.peoplesoft.com:8001/PSIGW/PeopleSoftListeningConnector

2. Select **PeopleTools, Integration Broker, Gateways.**

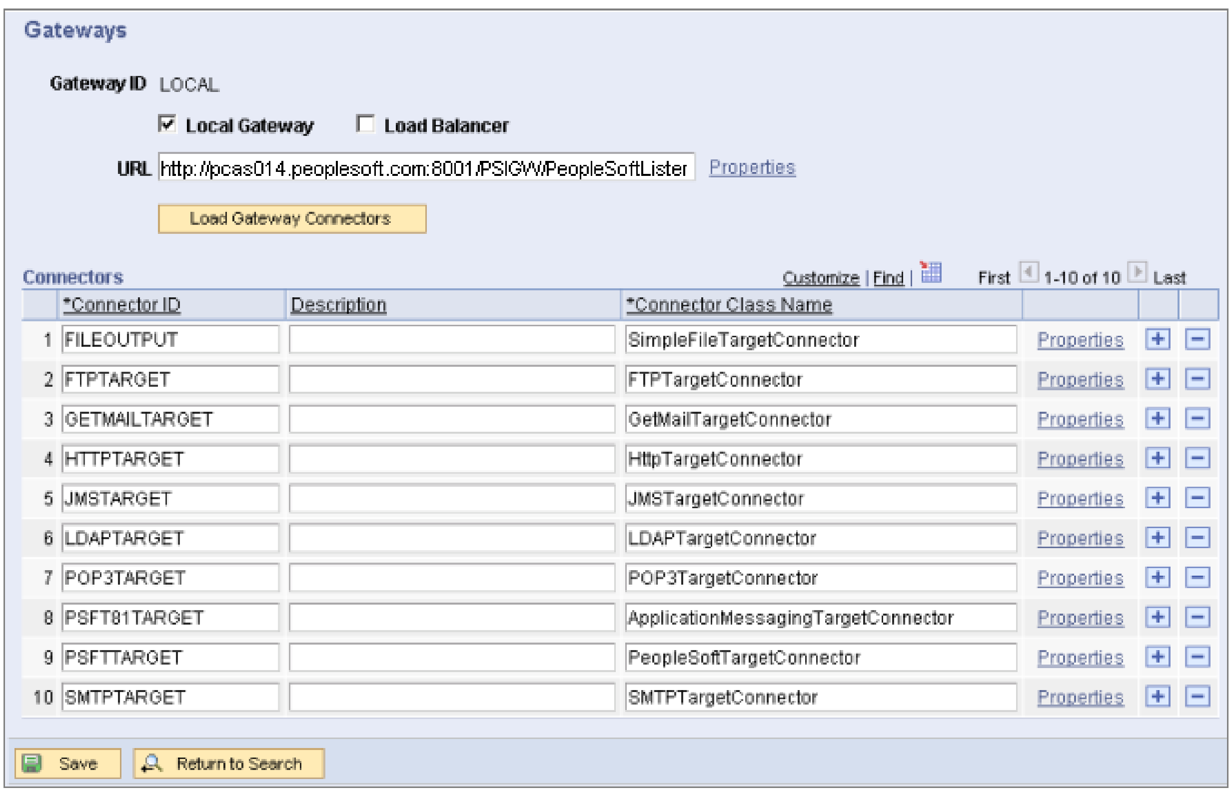
3. Select Gateway ID = LOCAL.

4. Specify Gateway URL

5. Click Save.

6. Click Load Gateway Connectors.

7. Click Save.



Gateways page

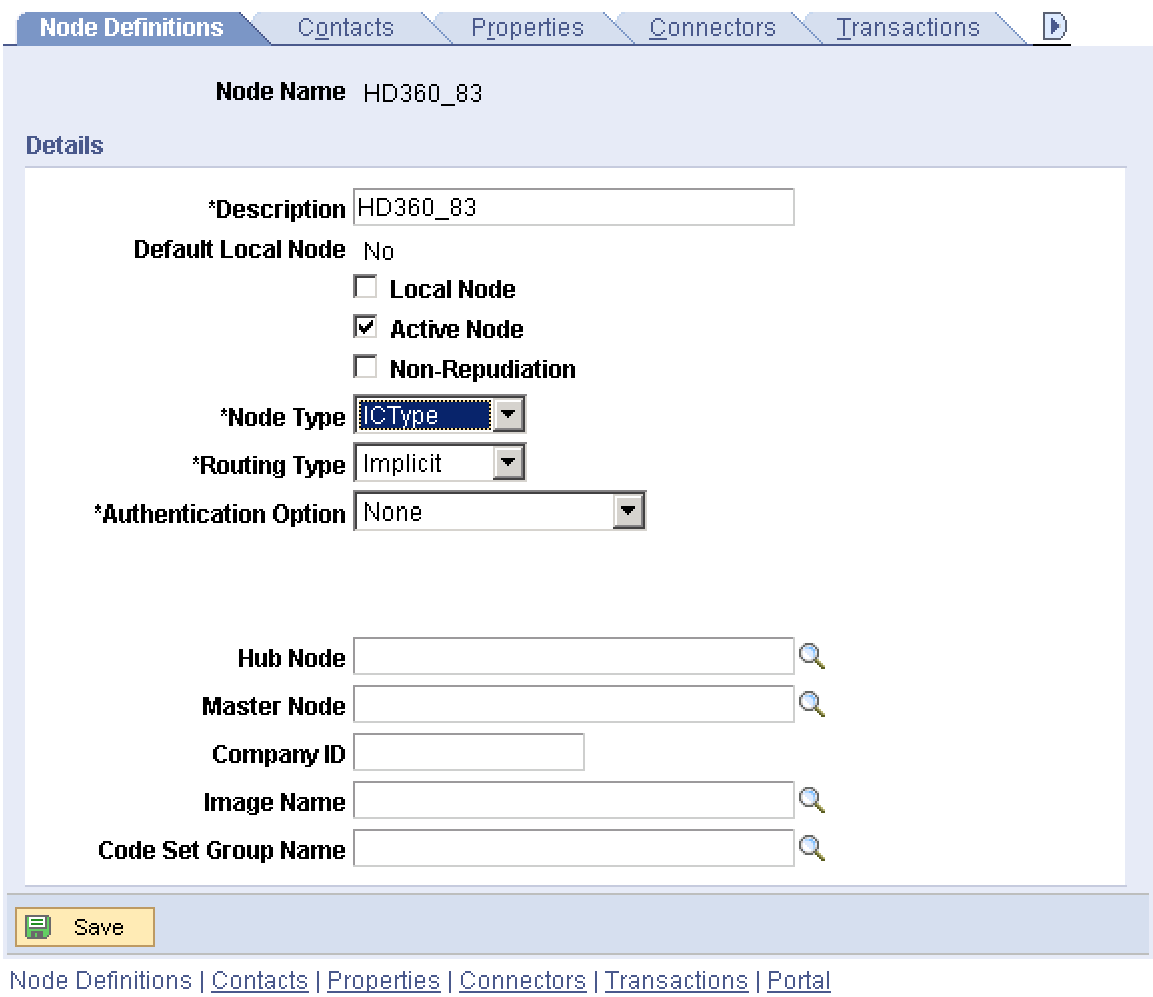
Task 6-16: Create XML LINK FOR 360 view Node in CRM

Create the XML Link for 360-view node on the CRM database as follows:

1. Select **PeopleTools, Integration Broker, Node Definitions**.

2. Click Add a New Value.

- For HRMS 8.3 SP1, name the node as HD360_83
- For HRMS 8.0 SP1, name the node as HD360_80



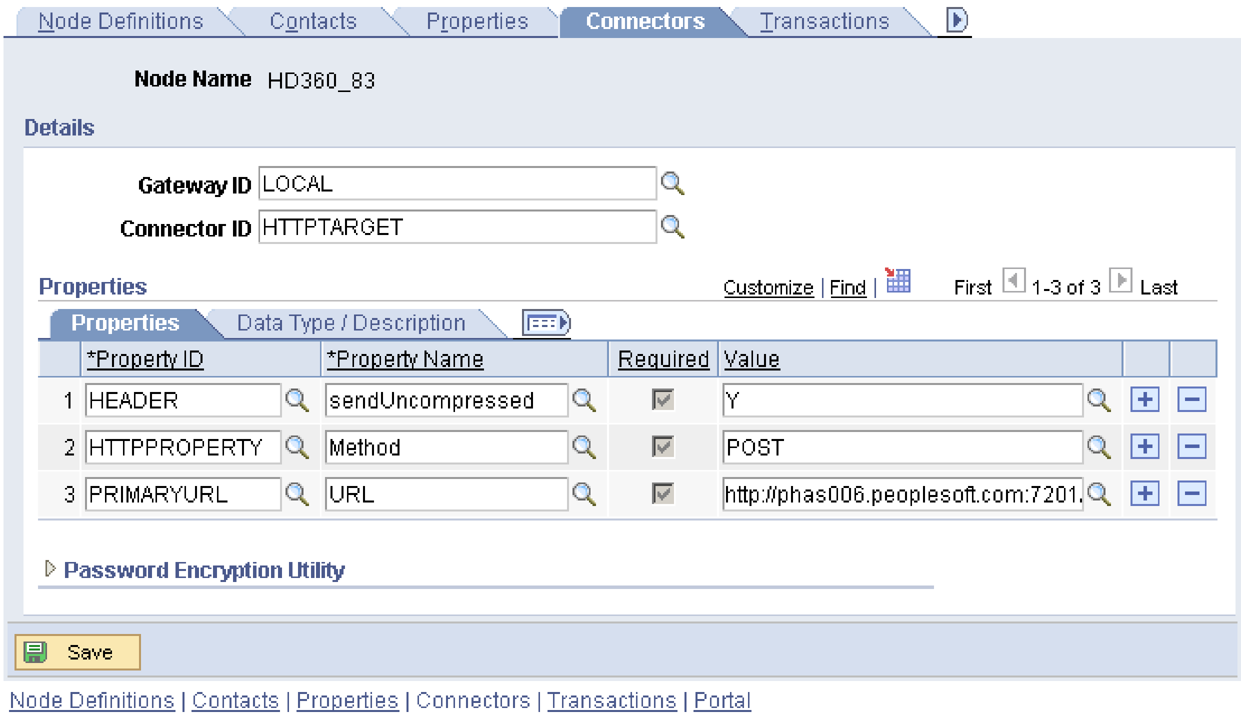
Node Definitions page

The Node Type ICType is specific to the 8.1x toolset, in our case 8.19. For the 8.4 toolset, it would be PIA. This is how the URL will be resolved and generated at runtime.

The Hub Node, Master Node, Company ID, Image Name, and Code Set Group Name are intentionally left blank. They are not necessary.

3. Skip the Contacts and Properties Tab. They can be left default (blank).

4. Go to the Connectors tab.



Connectors page

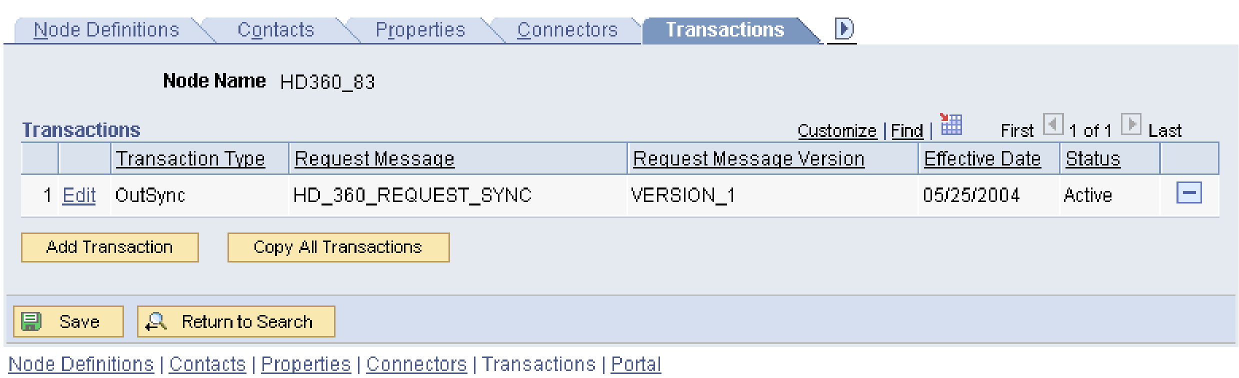
5. Select the Gateway ID as ‘Local’ and Connector ID as ‘HTTPTARGET’.

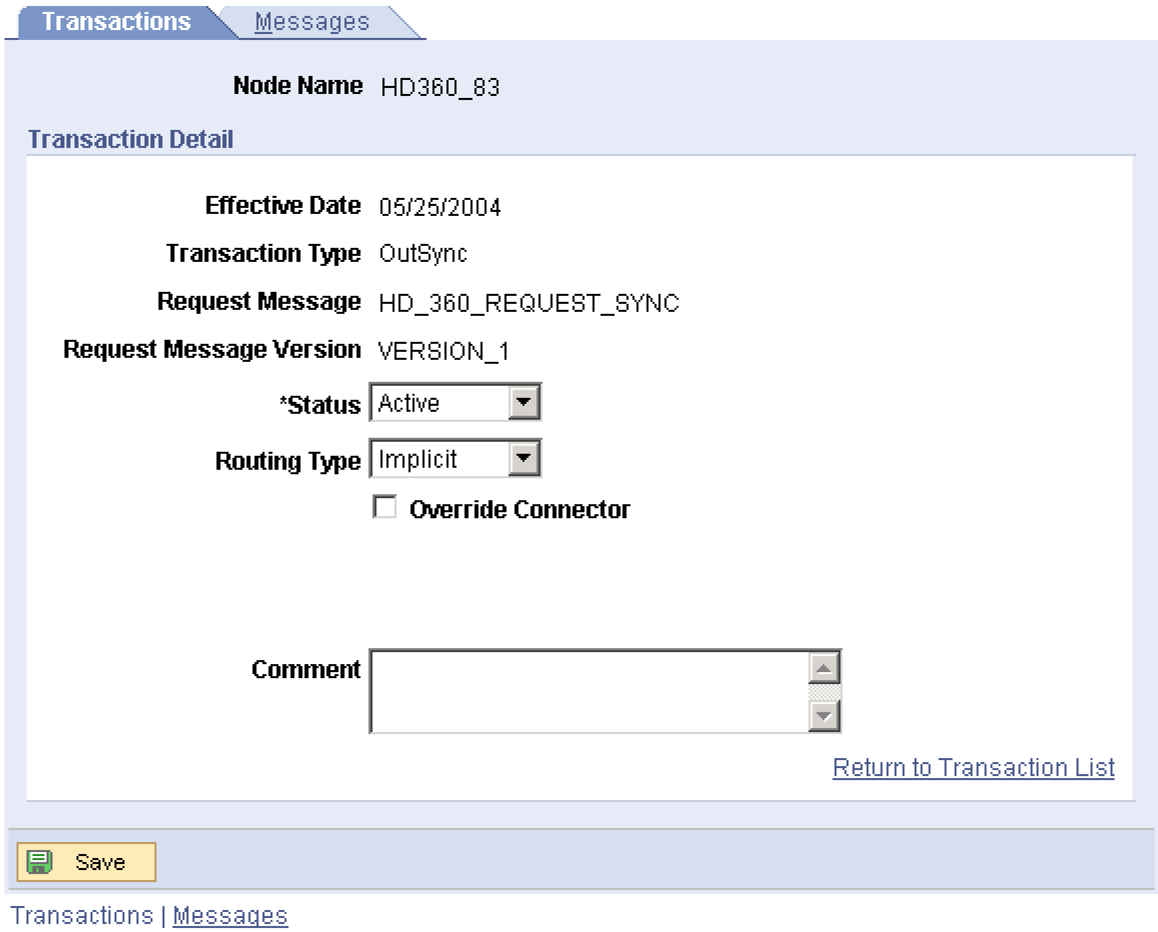
- The HEADER, HTTPPROPERTY and PRIMARYURL property ID’s should then automatically populate. Modify the value of the PRIMARYURL as follows:

  http://[machinename]:[port]/servlets/xmllink/[PIA instance]/HRMS360

  Example:
  http://phas006.peoplesoft.com:7201/servlets/xmllink/h831pbxnt/HRMS360?userid=PS&pwd=PS

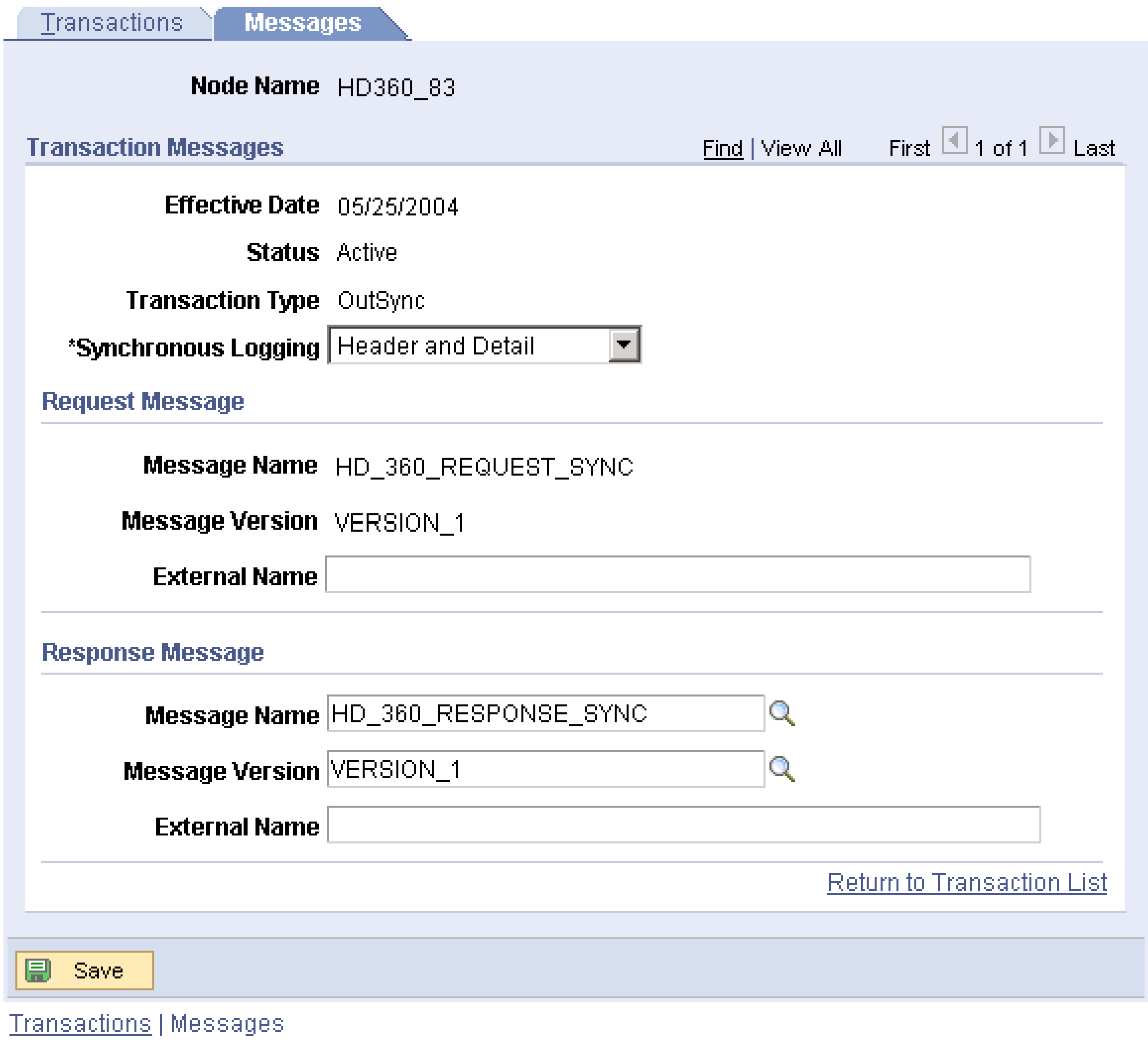
6. Next, navigate to the Transactions tab and add the following transaction:





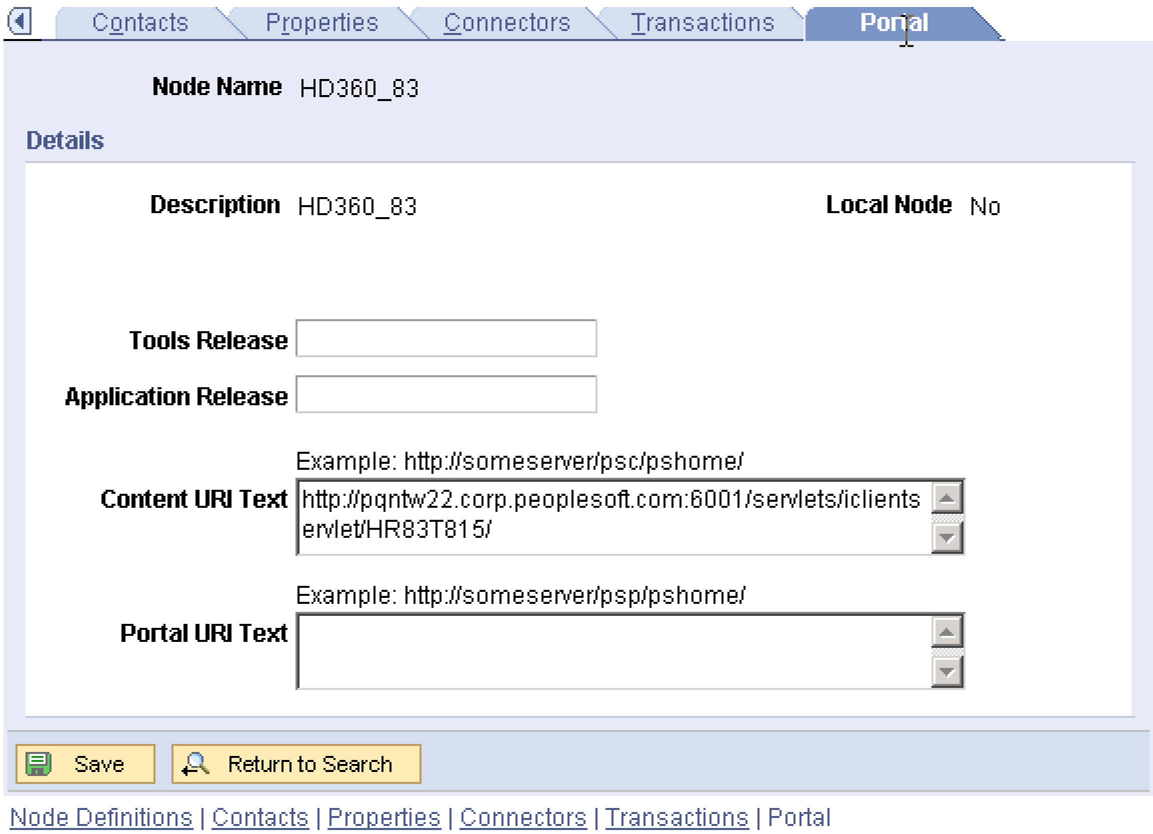
Transactions page

7. Set the Status as being ‘Active’ and Routing Type of ‘Implicit’.



Messages page

8. Add the HD_360_RESPONSE_SYNC message in the Response Message area. Select the Version as ‘VERSION_1’. Next, navigate to the Portal tab.



Portal page

9. Set your Content URI Text to the web directory of your HR domain. The URI will have a format as follows:

   http://[machinename]:[port]/servlets/iclientservlet/[PIA instance]/

   Example: http://phas006.peoplesoft.com:7201/servlets/iclientservlet/h831pbxnt/

10. Save the node.

Task 6-17: Create Action Link Node in CRM

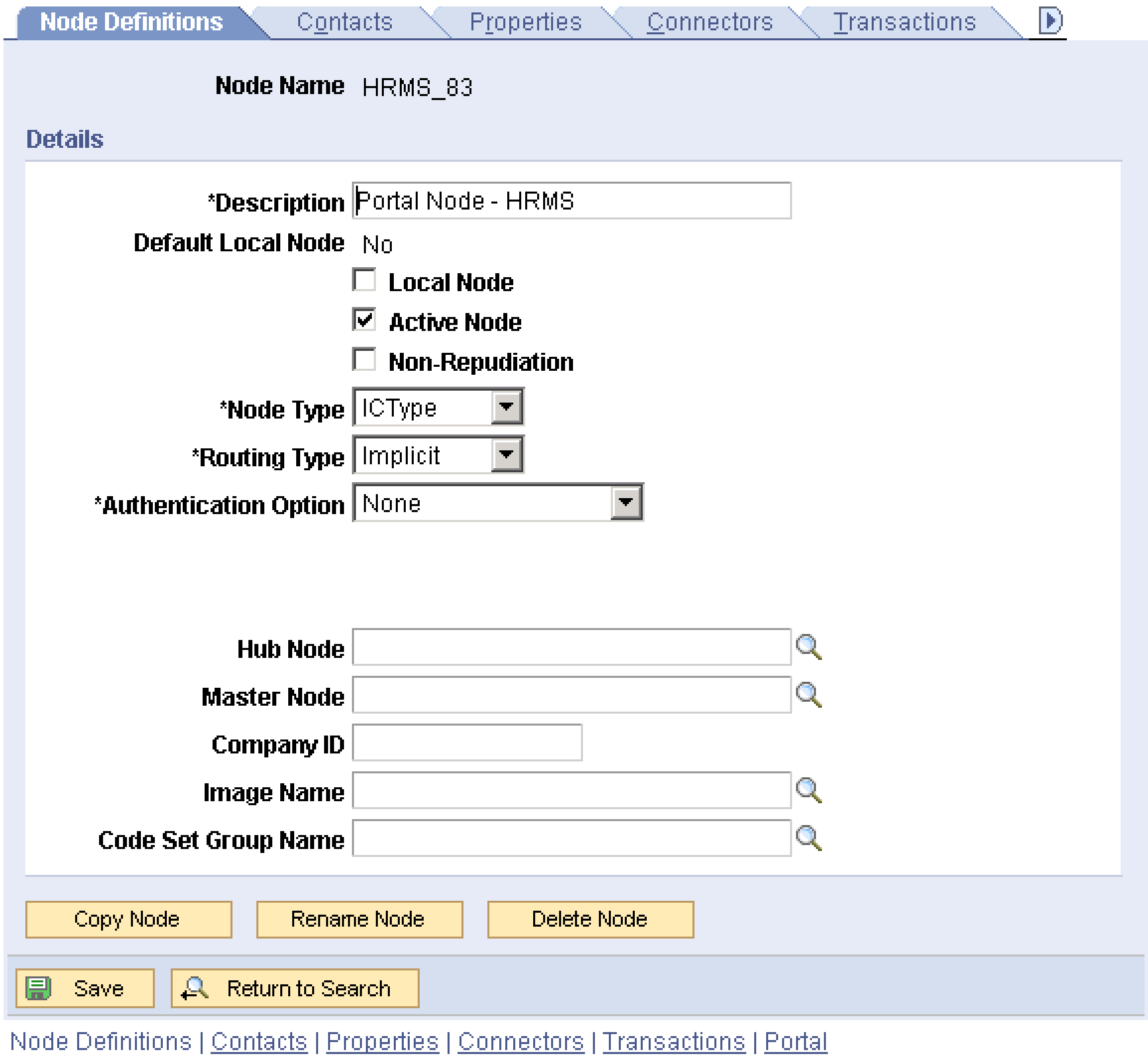
To Create the Action Link Node on the CRM database.

1. Select **Home, PeopleTools, Integration Broker, Node Definitions**.

2. Click Add a New Value

   - For HRMS 8.3 SP1, name the node HRMS_83.
   - For HRMS 8.0 SP1, name the node HRMS_80.

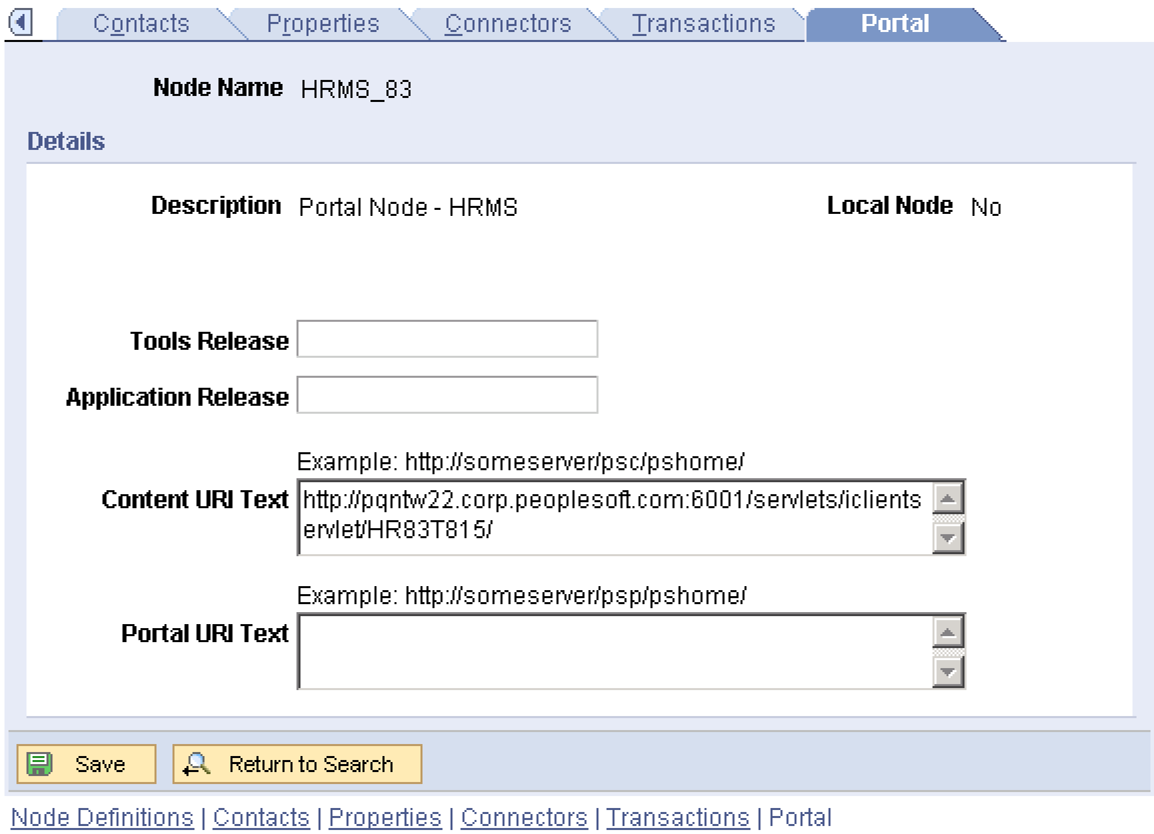
> **Note**. These node names are important for the links to work.



Node Definitions page

The Node Type must be 'ICType' with a Routing Type of 'Implicit'. The Node will have no Authentication Option and must be checked to be an 'Active Node'. All other information is optional.

3. The Connectors tab information is not needed for this node. Navigate next to the Portal tab.



Portal page

4. Set your Content URI Text and Portal URI Text to the web directory of your HR domain. The URI will have a format as follows:

   http://[machinename]:[port]/servlets/iclientservlet/[PIA instance]

   Example: http://phas006.peoplesoft.com:7201/servlets/iclientservlet/h831pbxnt/

5. Save the node.

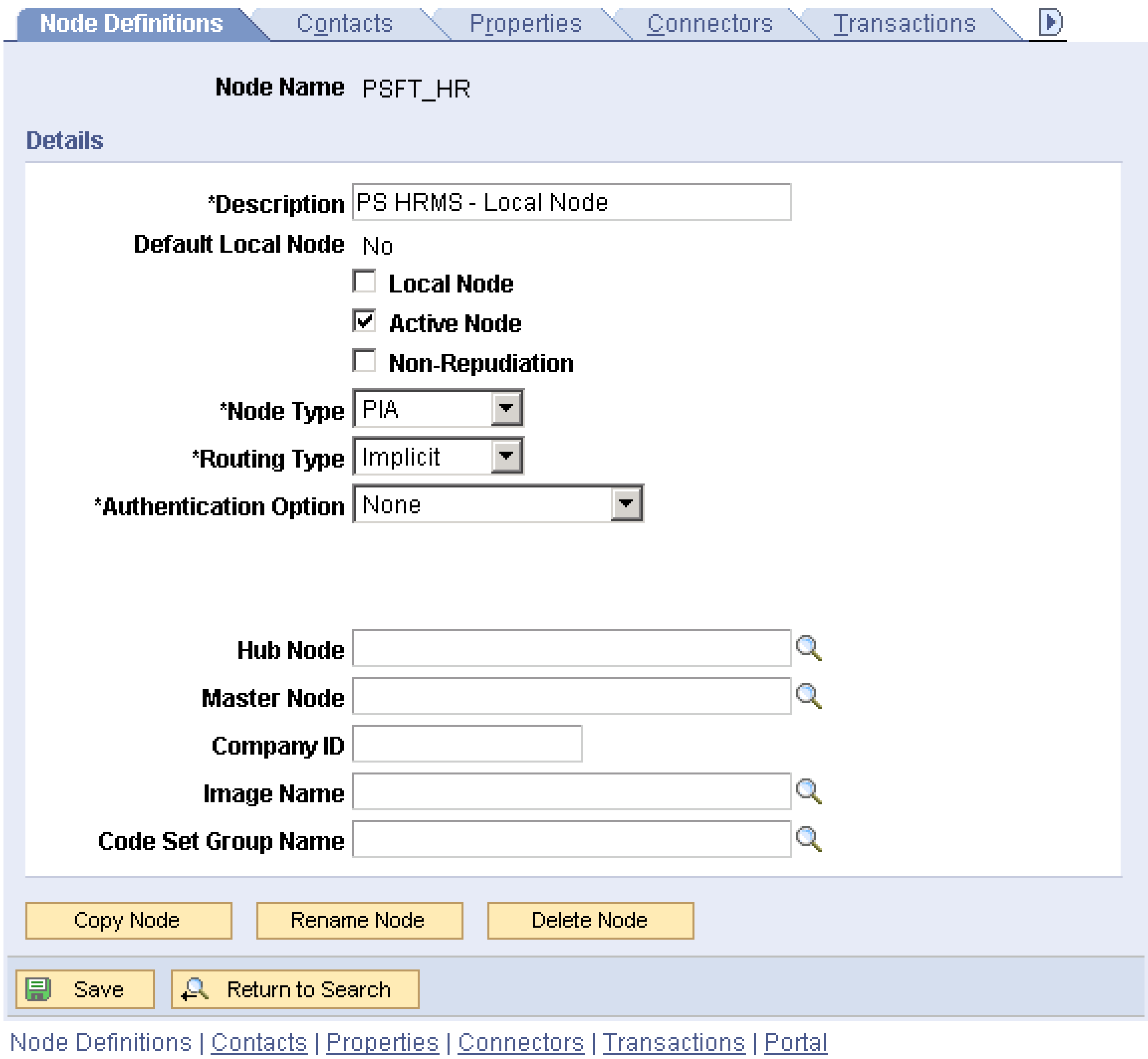
Task 6-18: Create HR Local Node in CRM

To Create the HR Local Node in CRM:

Create the HR Local node on the CRM Database if it does not already exist. This node will point to the local node that is defined on the HRMS database. This node definition is needed on the CRM system to enable Single Sign-on access.

1. Select **Home, PeopleTools, Integration Broker, Node Definitions.**

2. Click Add a New Value.



Node Definitions page

3. The Node Type must be ‘PIA’ with Routing Type of ‘Implicit’ and no Authentication Option. The node must also be marked as ‘Active’.

Connectors page

4. Navigate to the Connectors tab. Select 'PSFT81TARGET' as the Connector ID and Property ID. The Property Name should be 'URL'. The No Value field is not required.

Note. No additional information needs to be entered on the remainder of the tabs.

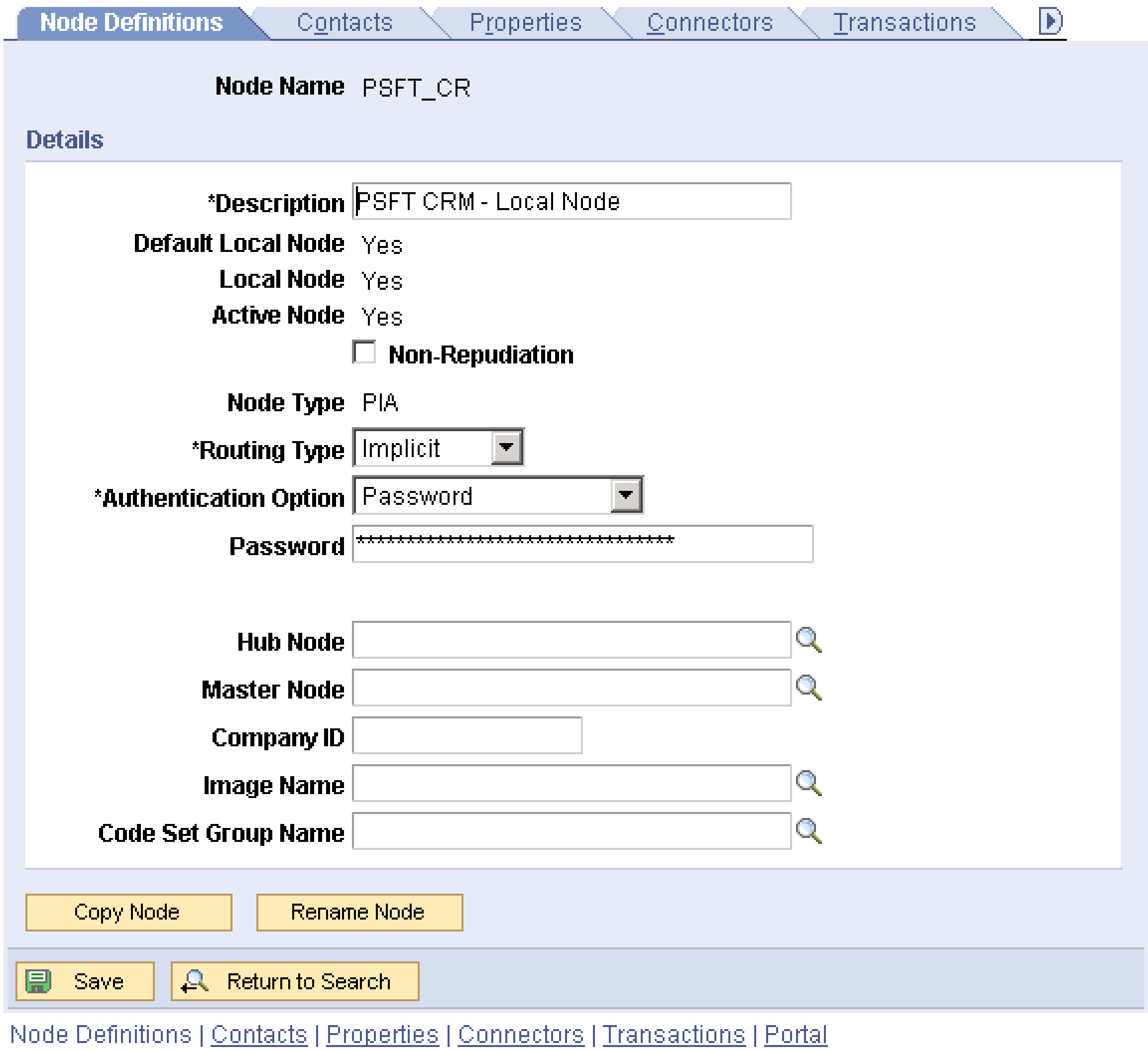
Task 6-19: Set the Password for CRM's Default Local Node in CRM

To Set the Password for the CRM Default Local Node:

1. Select **Home, PeopleTools, Integration Broker, Node Definitions**

2. Search for CRM's DEFAULT local node of C880PCX (if C880PCX is CRM's DEFAULT local node).

3. Enter a password that matches password on HRMS side for CRM's DEFAULT local node of C880PCX.

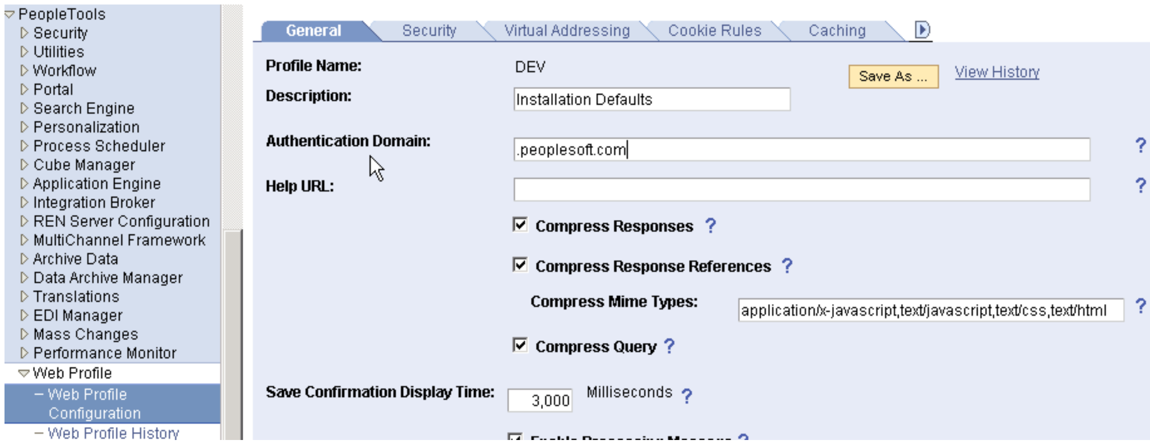


Node Definitions page

Task 6-20: Add Authentication Domain in CRM

To Add the Authentication Domain in CRM:

1. Select **PeopleTools, Web Profile, Web Profile Configuration**
2. Add the Authentication Domain as .[domain].com (For example: .peoplesoft.com)
3. Restart the Web Domain

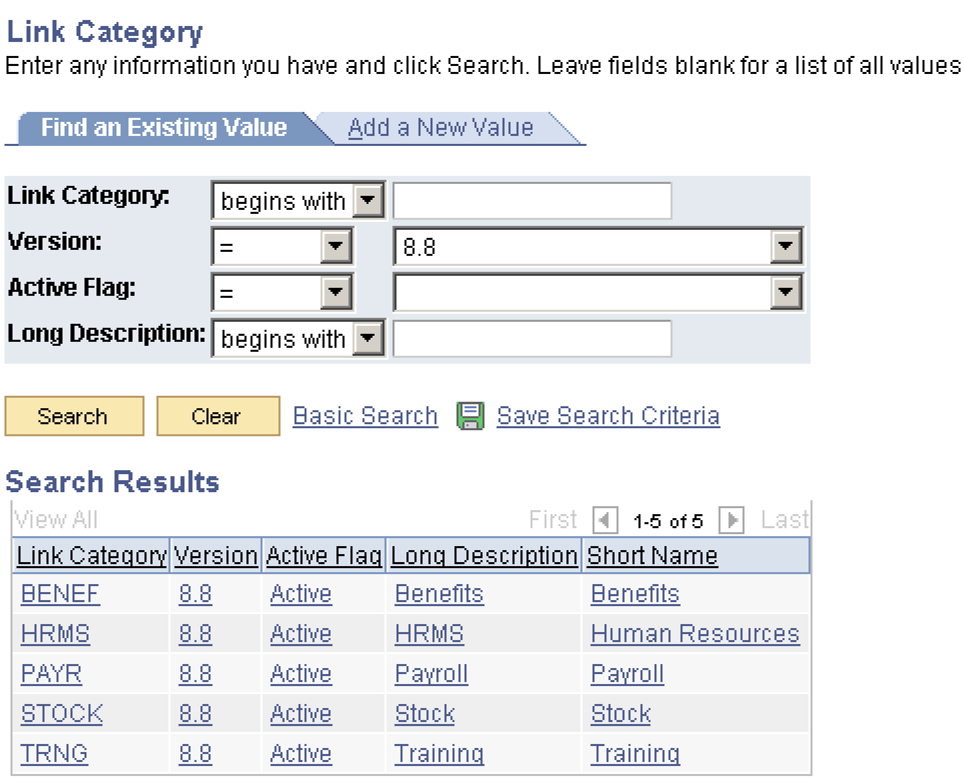


Web Profile Configuration page

Task 6-21: Activate the Link Category Definition in CRM

To Activate Link Category Definition for HRMS 8.8:

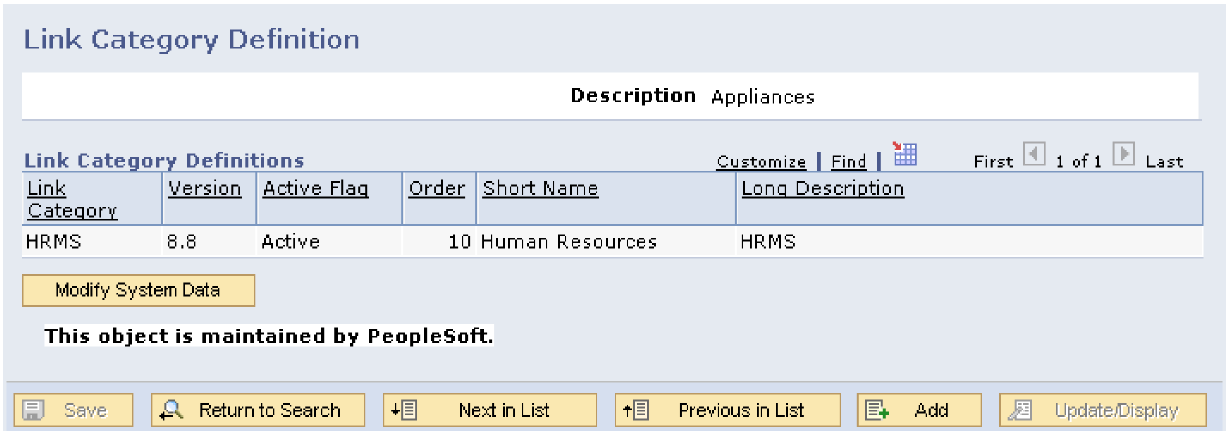
1. Select **Home, Set Up CRM, Product Related, Call Center, Link Category**.
2. Search for version 8.8



Link Category Search page

3. Open each Link Category and deactivate them

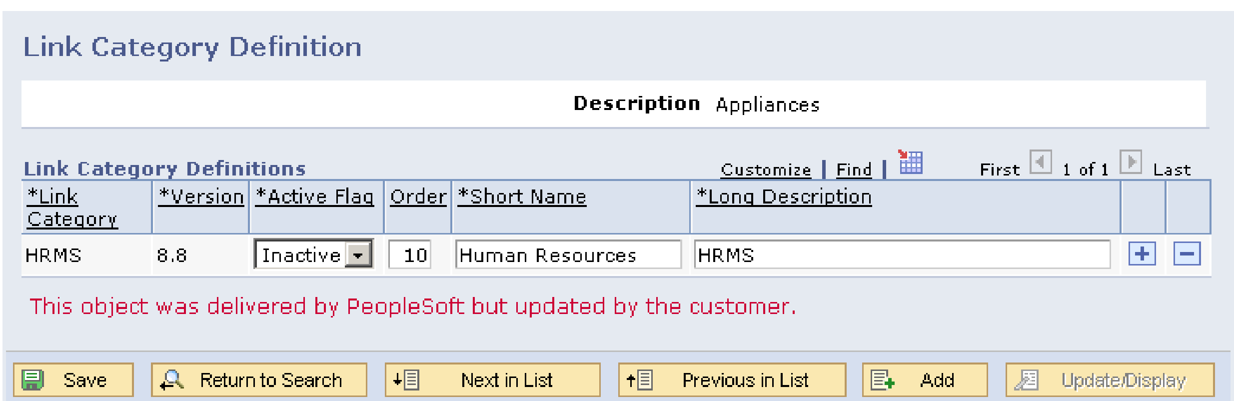
4. Click on Modify System Data button



Link Category Definition

5. Select Inactive from Active Flag dropdown list.

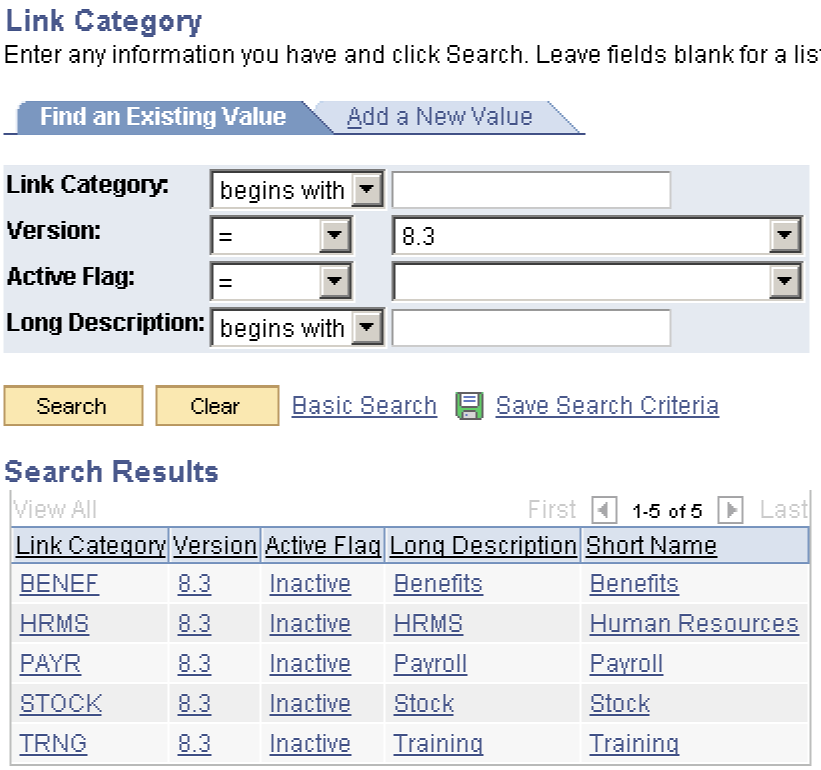
6. Click Save.



To Activate Link Category Definition for HRMS 8.0 or 8.3:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Category.

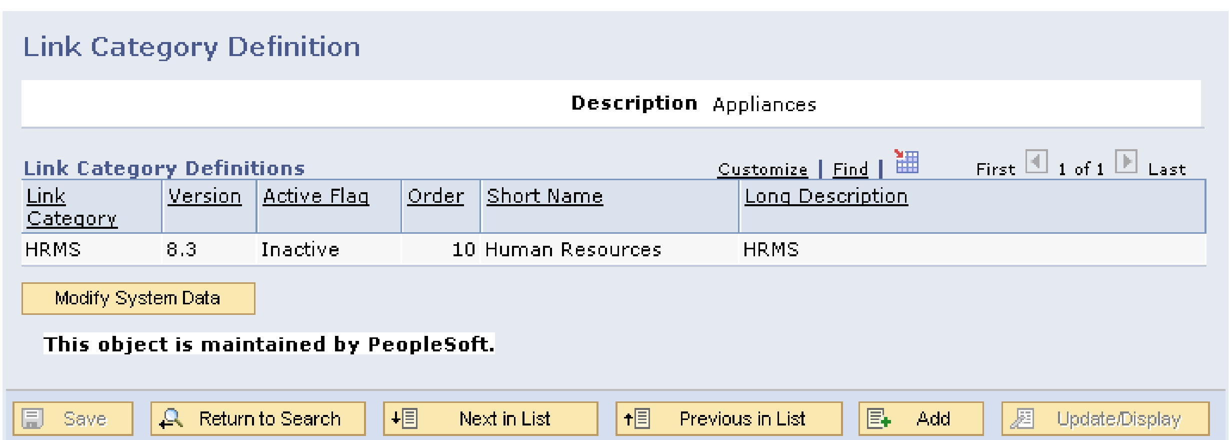
2. Search for the HRMS version (8.0 SP1 or 8.3) that is integrated with CRM 8.9.



Link Category Search page

3. Open each Link Category and activate.

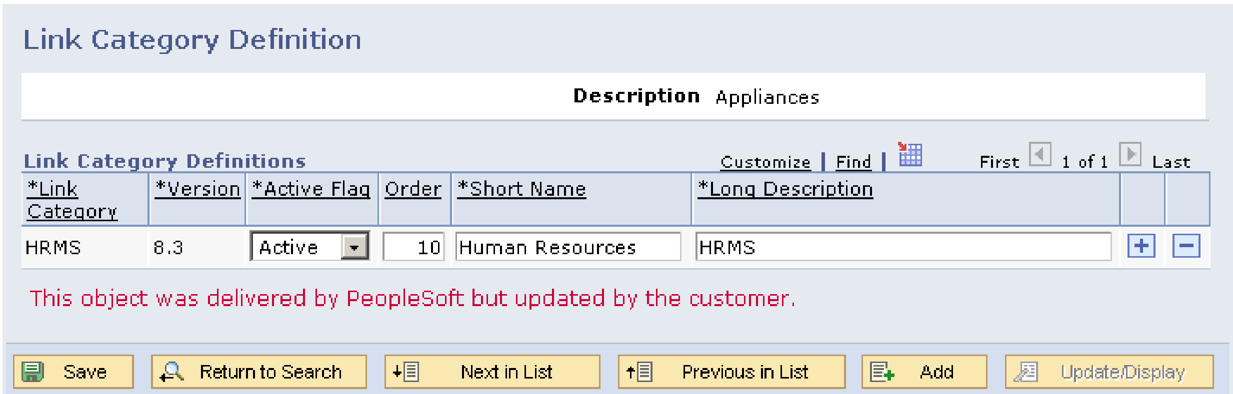
4. Click on Modify System Data button.



Link Category Definition page

5. Select Active from the Active Flag dropdown list.

6. Click Save.



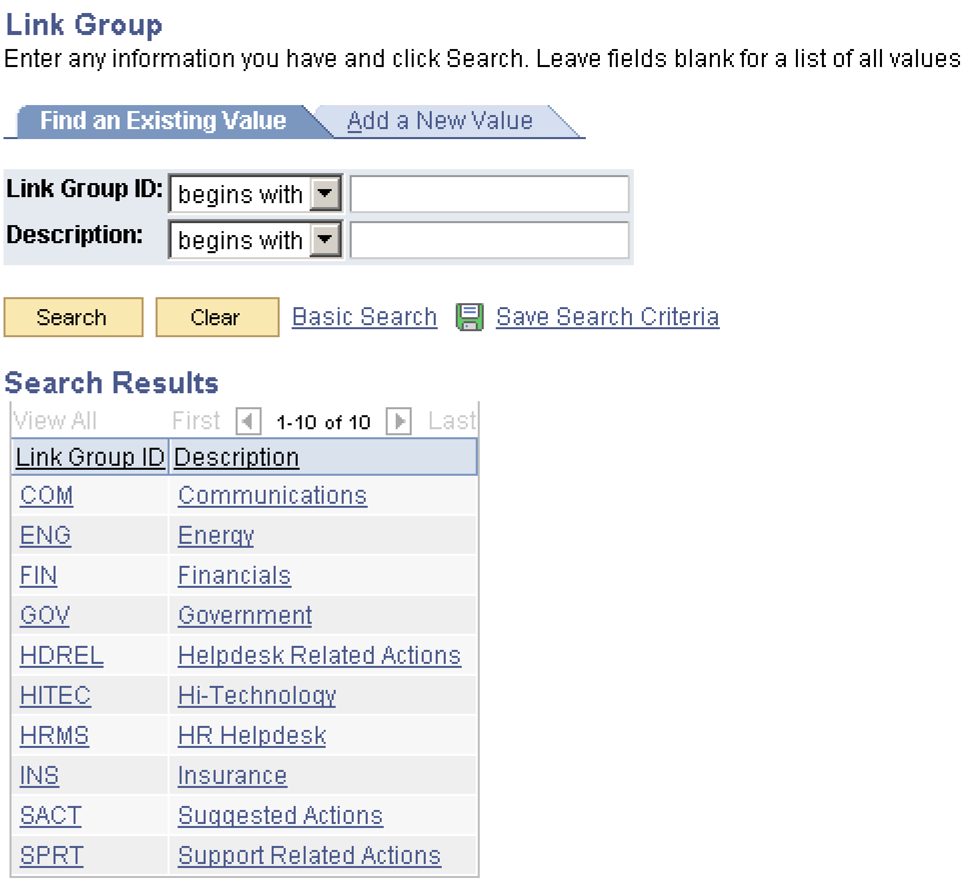
Link Category Definition page

Task 6-22: Set Up Link Group in CRM

To Set Up the Link Group in CRM:

1. Select **Home, Set Up CRM, Product Related, Call Center, Link Group.**

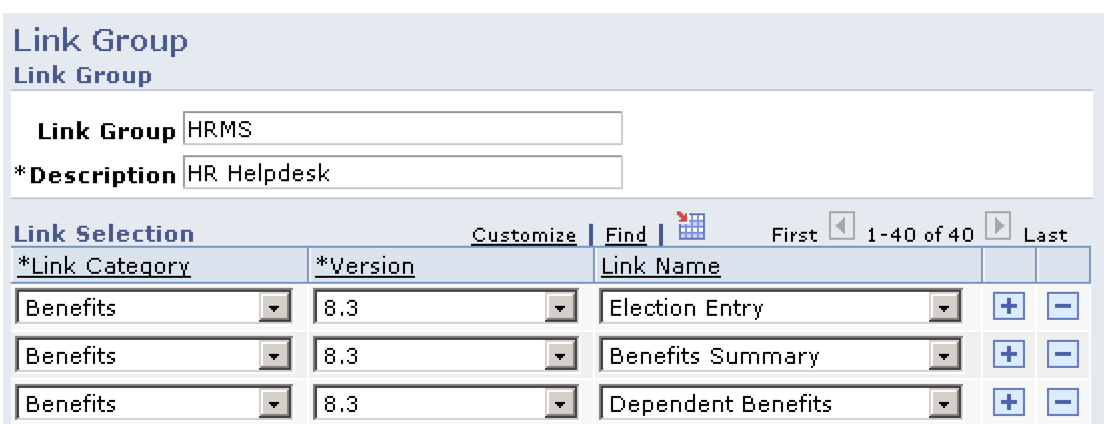
2. Click on Search and Select HRMS from the Search Results list.



Link Group Seach page

3. Select correct HRMS version from the Version dropdown list for every link.

4. Click Save.



Link Group page

Task 6-23: Copy the HRMS CREF Project in CRM

To Copy the HRMS CREF Project:

Import the HRMS80_CREFS or HRMS83_CREFS project that correspond to HRMS 8.0 SP1 or 8.3 SP1 into the CRM database via Application Designer by selecting **Tools, Copy Project, From File.**

These project files are delivered on the Peoplesoft CD and should have been installed on the specified NT File Server under the following directory. <PS_HOME> refers to the filepath where PeopleTools was installed on the NT File Server.

<PS_HOME>\projects\HRMS80_CREFs

<PS_HOME<\projects\HRMS83_CREFs

Task 6-24: Reboot the CRM Application and Web Servers in CRM

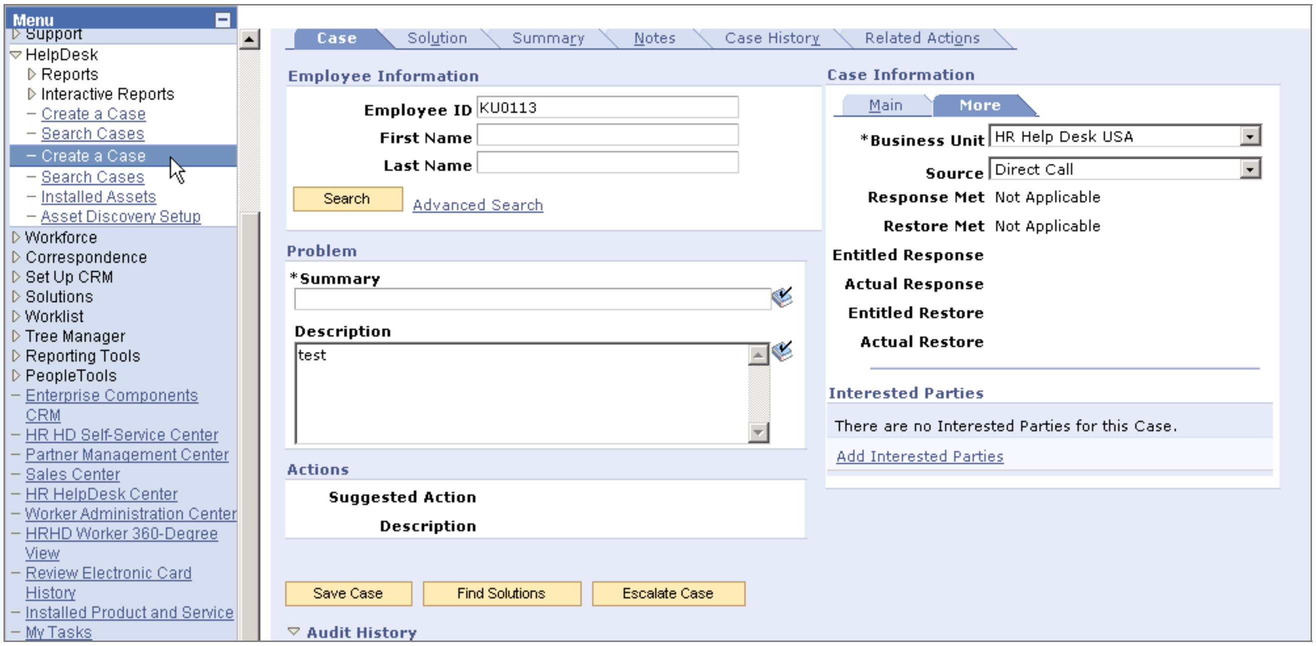
1. Clear the cache and reboot the app server.
2. Reboot the web server.

Task 6-25: Verify Action Links and HRHD 360 view working in CRM

Login CRM database via PIA as HHDUSA_AGT3/ HHDUSA_AGT3 to complete the procedures within this task.

To Test Action Links:

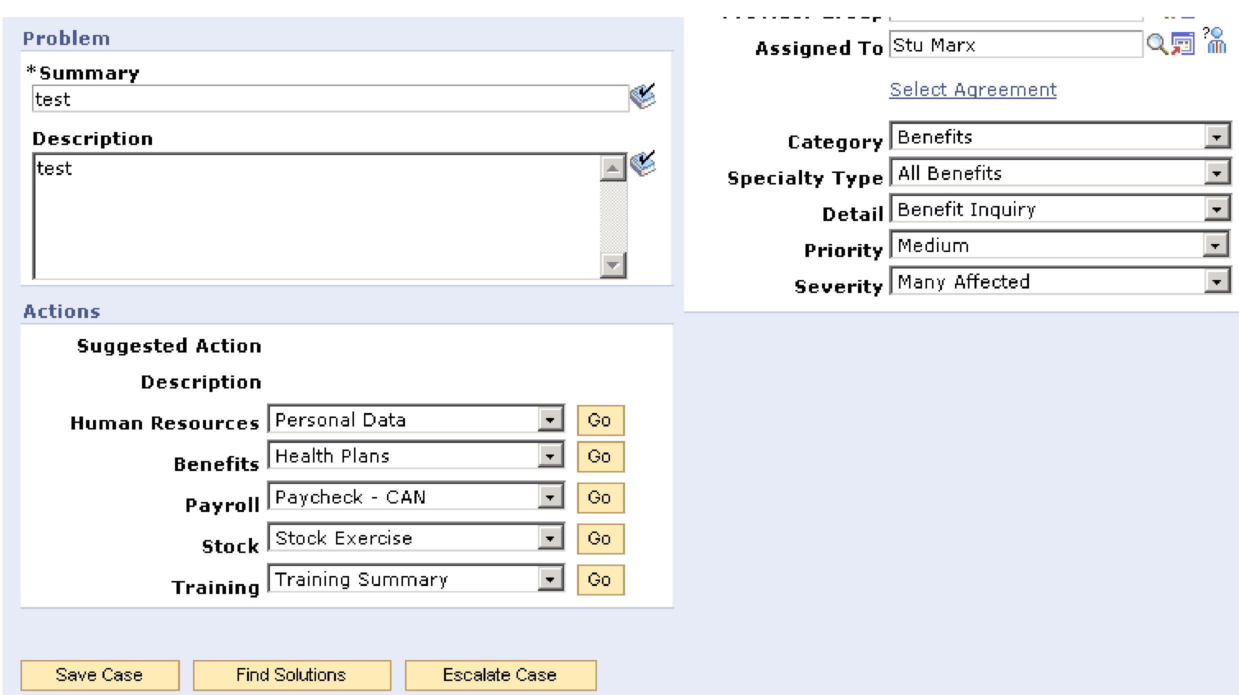
1. Select **Home, HelpDesk**
2. Click on Create a Case hyperlink that is to add a new case in HelpDesk for Human Resources
3. Click on More tab in Case Information section
4. Select Business Unit: “HR Help Desk USA”
5. Search for Emplyoee ID: “KU0113”
6. Enter Description
7. Click on Save Case.



Case page

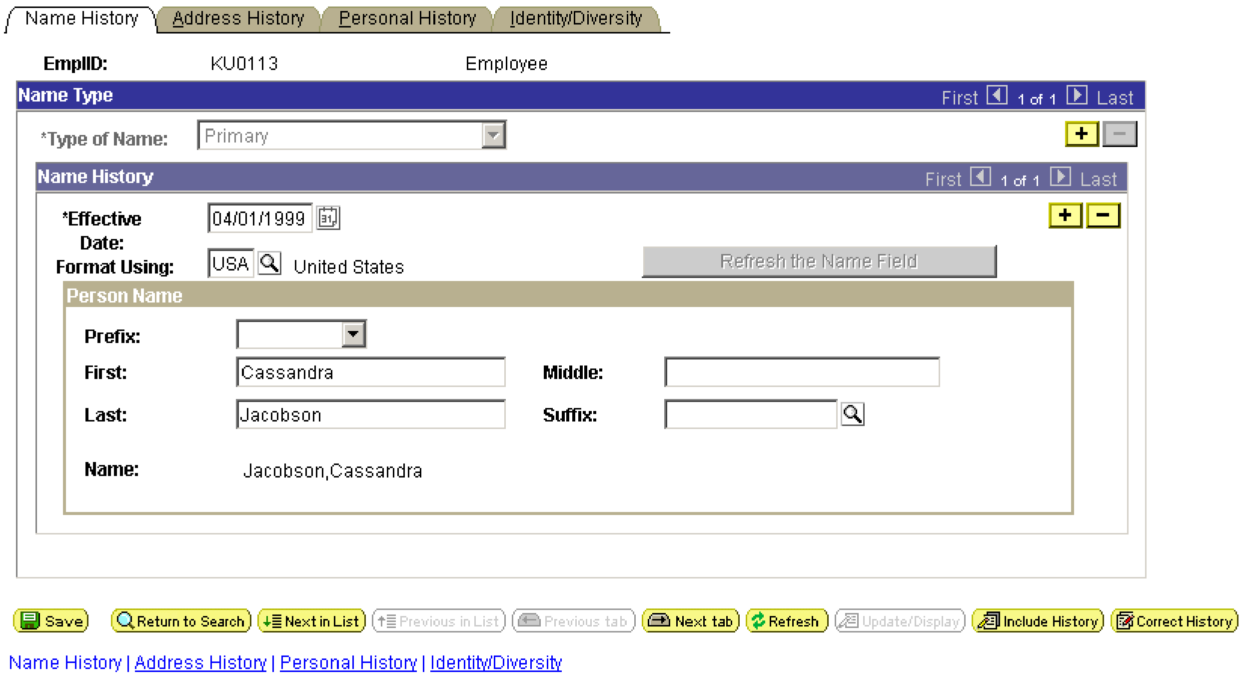
8. Select any link from the Actions section and click the Go button. It will launch a new window and will open a HR page without any errors.

9. For example, select Personal Data from HRMS and click Go.



xx

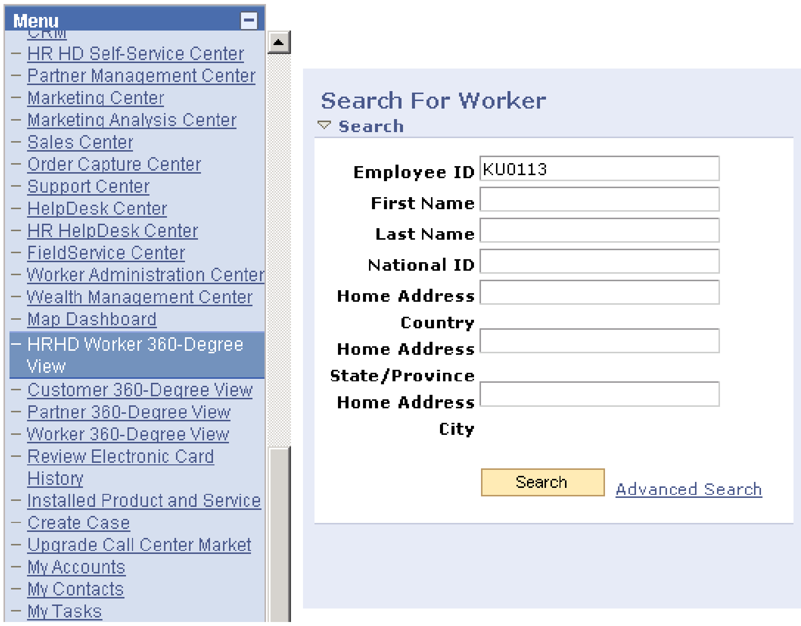
This will open the Personal Data page from HR database as follows:



Personal Data page

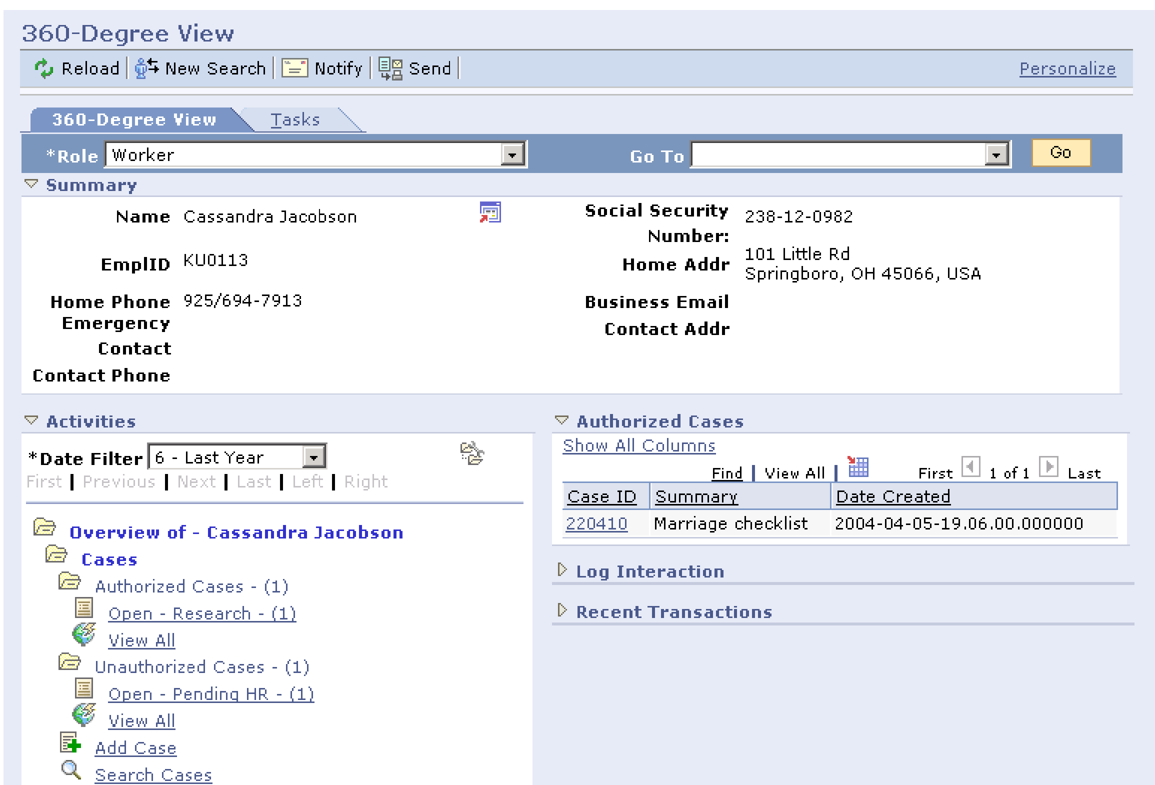
To Test the HRHD 360-Degree View:

1. Select HRHD Worker 360-Degree View from the menu.
2. Enter KU0113 in EmplID field and Search.



HRHD Worker 360-Degree View Search page

The Worker 360-Degree View and Worker record are populated with data that comes from the HRMS database.



Worker 360-Degree View

Worker Detail page

C H A P T E R 7

INSTALLING THE PEOPLESOFT ENTERPRISE CRM 8.9 PORTAL PACK

Task Overview

If you use the PeopleSoft Enterprise CRM Portal Pack without the Enterprise Portal, you'll need to enable users to personalize their Portal Pack homepage. If you have implemented the Enterprise Portal and want to access PeopleSoft CRM 8.9 from within the Enterprise Portal database, you will need to set up a link to PeopleSoft Enterprise CRM 8.9 and enable single sign-on.

Note. Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook*.

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

The following table summarizes this chapter's tasks. All tasks must be completed for both the System and Demo databases *unless* otherwise indicated in the task.

Task No.	Task Name
Task 7-1	Grant Access to the PeopleSoft Enterprise CRM 8.9 Portal Pack Homepage Personalization
Task 7-2	Access PeopleSoft Enterprise CRM 8.9 from PeopleSoft 8.4x Enterprise Portal

Task 7-1: Grant Access to the PeopleSoft Enterprise CRM 8.9 Portal Pack Homepage Personalization

In order 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 CRM 8.9 database.
2. Open the Data Mover script <PS_HOME>\scripts\ PORTAL_HP_PERS.DMS.
3. Run this script against the PeopleSoft CRM 8.9 database.
4. Close Data Mover.

To Add the Portal User Role to the User IDs:

1. Sign on with PeopleSoft Data Mover to the PeopleSoft CRM 8.9 database.
2. Open the Data Mover script <PS_HOME>\scripts\ PORTAL_ADD_ROLE.DMS.
3. Run this script against the PeopleSoft CRM 8.9 database.
4. Close Data Mover.

Note. The PAPP_USER role should be granted to all new User IDs for access to the Homepage personalization. After running this script, the role PAPP_USER should be manually removed from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 7-2: Access PeopleSoft Enterprise CRM 8.9 from PeopleSoft 8.4x Enterprise Portal

Note. Only perform this task if you own the PeopleSoft Enterprise Portal product and want to access your application from within the PeopleSoft Enterprise Portal database.

The installation phase of your PeopleSoft application should only entail setting up a single link to the application content provider, PeopleSoft Enterprise CRM 8.9.

To set up the link and the single sign-on, see the *Portal Products 8.4 Installation Guide* document on Customer Connection at http://www4.peoplesoft.com/cc/. Within this guide, Chapter 3 discusses setting up single sign-on to your application database and Chapter 4 discusses accessing the PeopleSoft content providers.

Note. When you begin your implementation phase, refer to the *Enterprise Portal 8.4x - Implementing Navigation and Portal Packs* document on Customer Connection. This documentation discusses your options on how to handle the PeopleSoft content provider navigation and where to find all the needed scripts, projects and documentation.

CHAPTER 8

INSTALLING PEOPLESOFT ENTERPRISE ADVANCED CONFIGURATOR 8.9

This chapter provides instructions for installing PeopleSoft Enterprise Advanced Configurator 8.9.

Note. Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook.*

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes this chapter's tasks.

Task No.	Task Name
Task 8-1	Prepare to Install on Windows
Task 8-2	Install the WebLogic Application Server
Task 8-3	Install the PeopleSoft Enterprise Advanced Configurator Server on Windows
Task 8-4	Start and Configure the PeopleSoft Enterprise Advanced Configurator Server
Task 8-5	Prepare to Install PeopleSoft Enterprise Advanced Configurator on Solaris 2.8 or 2.9

Task 8-6	Install the WebLogic Application Server on Solaris 2.8 or 2.9
Task 8-7	Install the PeopleSoft Enterprise Advanced Configurator Server on Solaris 2.8 or 2.9
Task 8-8	Start and Configure the PeopleSoft Enterprise Advanced Configurator Server on Solaris 2.8 or 2.9
Task 8-9	Install the PeopleSoft Visual Modeler
Task 8-10	Install the PeopleSoft Enterprise Mobile Advanced Configurator
Task 8-11	Installing for Integration to PeopleSoft Enterprise Order Capture

Before you Begin

You can install this release of the PeopleSoft Enterprise Advanced Configurator on either the Windows 2000 Server or the Solaris 2.8 or 2.9 (Unix) system platforms. This chapter lists the supporting software products that are either required or recommended for installing and running PeopleSoft Enterprise Advanced Configurator 8.9.

The PeopleSoft Enterprise CRM version 8.9 CD-ROM contains the following PeopleSoft Enterprise Advanced Configurator components and supporting software:

- PeopleSoft Enterprise Advanced Configurator Server for Windows 2000 Server (Part 1)
- PeopleSoft Enterprise Advanced Configurator Server for Solaris 2.8 or 2.9 (Part 2)
- PeopleSoft Visual Modeler for Windows environments (Part 3)
- PeopleSoft Mobile Configurator Packaging Tool and Mobile Configurator Client (Part 4)
- BEA Systems™ WebLogic® Application Server 8.1SP2 (Service Pack 2 with post SP2 patch)
- Java Development Kit™ (JDK) 1.4.1

Supported Databases

The following supported database products are available from other sources:

- SQL Server 2000 (used on Windows 2000 Server systems only)
- Oracle 9i (used on Windows 2000 Server or Solaris 2.8 or 2.9 systems)
- DB2 UDB

The supported Platforms (both the database platform and the operating system) are updated from time to time. Please refer to the document “Enterprise CRM 8.9 Release Definition” that is available in Customer Connection under the Support / Roadmaps + Schedules section.

PeopleSoft Enterprise Advanced Configurator Installation Process Overview

The following are general steps intended for reference only. They summarize the procedures for properly installing the PeopleSoft Enterprise Advanced Configurator components. Each of these steps is described in greater detail in subsequent tasks in this chapter.

To Install the PeopleSoft Enterprise Advanced Configurator Server:

Installing the PeopleSoft Enterprise Advanced Configurator Server on either the Windows or Solaris operating systems consists of these general steps:

1. Install the BEA WebLogic Application Server 8.1SP2 (hereafter known as WebLogic 8.1SP2).

> **Note.** The Java Development Kit (JDK) 1.4.1 is installed in subdirectories of WebLogic as part of the WebLogic 8.1SP2 installation.

2. Install the BEA WebLogic 8.1SP2 patch included with the PeopleSoft Enterprise CRM Distribution by unzipping the file weblogic81sp2patch.zip to your WebLogic directory.

3. Install and configure the appropriate database for your system platform type.

4. Install the Advanced Configurator Server.

5. Configure WebLogic 8.1SP2 and the PeopleSoft Enterprise Advanced Configurator Server (and restart the system if you are installing on a Windows Server).

6. If you want to install a newer, supported Weblogic Service Pack than SP2, you can do so now.

7. If you are integrating with PeopleSoft Enterprise Order Capture, perform the related setup at this stage.

8. Install PeopleSoft Visual Modeler, if desired.

The Mobile Configurator Packaging Tool and the Mobile Configurator Client are independent applications, sold and licensed separately. They do not require the functions of the WebLogic application server, the PeopleSoft Enterprise Advanced Configurator Server, the Visual Modeler, or each other. Thus, they do not require installation in a sequence relative to these other Advanced Configurator components.

To Uninstall PeopleSoft Enterprise Advanced Configurator Components:

Un-installing PeopleSoft Enterprise Advanced Configurator components from your system requires that you follow a specific order of removal:

1. Remove Advanced Configurator Visual Modeler, if it is installed on the same machine as the Server.

2. Remove Advanced Configurator Server.

3. Remove WebLogic 8.1 SP2.

Visual Modeler and Advanced Configurator Server Overview

Depending on the phase of model development, PeopleSoft Visual Modeler can be run stand-alone or in conjunction with the PeopleSoft Enterprise Advanced Configurator Server. Thus, you can install them either on the same system or on different systems in a distributed network environment.

The PeopleSoft Enterprise Advanced Configurator Server was designed with technology that supports configuration modeling and run-time configuration processing. The PeopleSoft Visual Modeler is a hierarchical modeling tool that is used for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.

The PeopleSoft Enterprise Advanced Configurator Server uses a compiled version of a model defined with the PeopleSoft Visual Modeler. Configurations are created from user selections made against the model and the Configuration Server at run time.

PeopleSoft Mobile Configurator Components Overview

The PeopleSoft Mobile Configurator Packaging Tool and the Mobile Configurator Client are independent applications and are sold separately. They do not require the functions of the WebLogic application server, the PeopleSoft Enterprise Advanced Configurator Server, the Visual Modeler, or each other.

You can install the PeopleSoft Mobile Configurator Packaging Tool on any Windows 2000 machine that can access the Solution files. Similarly, the PeopleSoft Mobile Configurator Client can be installed on any network-accessible field machine or as part of a package test environment.

Task 8-1: Prepare to Install on Windows

This section describes the minimum hardware, software, database, and client browser requirements that your system needs to meet in order for you to install and run the PeopleSoft Enterprise Advanced Configurator software on a Windows 2000 or Windows 2003 Server system. In addition, this chapter provides additional reference information that may be useful to know before you begin.

Note. WebLogic 8.1 (with Service Pack 2 and the subsequent patch) must be installed before the Advanced Configurator Server. If it is not, the WebLogic 8.1SP2 application server may not work properly.

Software and Hardware Requirements

The following represent the minimum hardware and software necessary for installing and using the PeopleSoft Enterprise Advanced Configurator Server on a Windows Server production system

Hardware Requirements for PeopleSoft Enterprise Advanced Configurator Server on Windows 2000 Server are:

- Dual-processor 450-MHz (or faster) Pentium III processor system with:
- 10 GB of available hard drive space
- 512 MB of RAM

Important! For the proper operation of Configuration Solutions employing compound models, the user’s browser must be configured to allow per-session cookies.

Software Requirements for the PeopleSoft Enterprise Advanced Configurator Server on Windows Server are:

- Microsoft Windows 2000 or 2003 Server

- BEA Systems WebLogic Application Server 8.1, Service Pack 2 or Service Pack 4

  Advanced Configurator supports only those versions of Sun Microsystems Java™ Development Kit (JDK) that ship with the supported WebLogic Service Packs.

> **Note.** The Java Development Kit is included as part of the WebLogic 8.1 installation.

- Web server (optional but recommended). Use this if a standard web server will be used to handle client requests.

> **Note.** BEA supports Netscape Enterprise Server™ and Microsoft Internet Information Server™. For specific information, see BEA WebLogic documentation.

Browser Requirements

Browser Requirements for the Client on Windows include one of the following browsers:

- Netscape Navigator™ 6.x (version 6.0 not recommended or supported)
- Microsoft Internet Explorer™ 5.x, 6.x

> **Note.** For the proper operation of Configuration Solutions employing compound models, the user's browser must be configured to allow per-session cookies.

Supported Databases

The database you choose must be properly installed and configured before you install the Advanced Configurator Server. This release of the PeopleSoft Enterprise Advanced Configurator Server supports the following types of databases for use on a Windows Server platform.

Supported Databases for the PeopleSoft Enterprise Advanced Configurator Server on Windows Server:

- Microsoft SQL Server 2000
- Oracle 9i
- DB2 UDB 8.1

> **Note.** JDBC drivers are installed with the Advanced Configurator Server installation. The UNICODE character set is also supported by default.

Database Setup Overview

The database configuration information in this section is general in nature and assumes that you have already identified the type of database configuration you need. If you are not sure of the configuration, contact your database administrator for more information before you begin.

Database Server Requirements

The database server can reside on a different system than the one where the Advanced Configurator Server components are installed.

The database server you use with the PeopleSoft Enterprise Advanced Configurator Server must meet the following requirements:

- Allow the database user account to make a minimum of 100 concurrent connections to the system.
- Support 50 dedicated concurrent connections.
- Set the value for the maximum number of extents for rollback segments to support 150 or more.

> **Note**. If you are installing SQL Server 2000, you must explicitly install TCP/IP support.

Database Configuration Requirements

The database configuration that you use with the PeopleSoft Enterprise Advanced Configurator Server must meet the following requirements:

- The tablespace/database for the PeopleSoft Enterprise Advanced Configurator Server components must be a minimum of 700MB. The tablespace requirements depend on the numbers of users and the number of documents that the system supports. For best results, consult your DBA or your database vendor for more specific details.

  > **Note**. Oracle uses the term "tablespace" to refer to the free space that is set aside for data allocation, whereas the SQL Server 2000 uses the term "database" to refer to this same free space.

- You must create a user account specifically for the PeopleSoft Enterprise Advanced Configurator Server and the tablespace must be the default location for this user account.
- The System Identifier (SID) for the database account must have all of the necessary read-write permissions to create and drop tables or indexes, and insert, select, delete, or update any table in the dedicated tablespace.
- Make a note of the tablespace, user ID, and password. You need to refer to them during Advanced Configurator Server installation.

  > **Note**. You can use the PeopleSoft Enterprise CRM database for configuration data, in which case you will need the system administrator login and password.

- If you are using an SQL Server 2000, allocate additional space to accommodate a transaction log. If a database is set to *Truncate Log on Checkpoint*, 4MB for log space is usually adequate.

JDK and JRE Requirements

You must install WebLogic 8.1SP2 (the WebLogic Application Server for the Advanced Configurator) before you attempt to install the Advanced Configurator Server.

During the WebLogic 8.1SP2 installation process, the Java Development Kit (JDK) 1.4.1 is automatically installed for you in a subdirectory under the WebLogic directory.

Task 8-2: Install the WebLogic Application Server

This section describes the installation process of the WebLogic Application Server. The WebLogic 8.1SP2 software provided with this release includes and installs JDK 1.4.1.

To Install the WebLogic Application Server:

1. Log in as Windows Server Administrator. Insert the PeopleSoft Enterprise CRM WebLogic CD-ROM and install the file weblogic812_win32.exe.

2. Select a location for the WebLogic server.

   You should run Advanced Configurator on a different instance of WebLogic than other PeopleSoft applications. Thus, if WebLogic 8.1SP2 is already installed on this server, you should nonetheless install another copy of WebLogic to a different directory to accommodate Advanced Configurator.

3. When the installation is complete, clear the check boxes of the options to install XMLSpy and run Quick Start.

4. Unzip the file weblogic81sp2patch.zip, also found on the PeopleSoft Enterprise CRM WebLogic CD-ROM, to the directory in which you installed WebLogic. (for example, c:\bea_cfg\weblogic81). A number of files should be overwritten.

Note. PeopleSoft PeopleTools and PeopleSoft Enterprise Advanced Configurator Server must run on separate instances of WebLogic 8.1SP2. Multiple instances of WebLogic can be run concurrently on the same server as long as they are all listening on different ports.

Running WebLogic as a Service

The PeopleSoft Enterprise Advanced Configurator Server is not affected by whether or not you run WebLogic 8.1SP2 as a Windows Service on your system. However, if you do run it as a service, you *must* stop it in the Windows Services window before you attempt to un-install it.

Important! We recommend that you do not set up WebLogic to run as a service; instead, set up the Advanced Configurator Server to run as a service.

Once you have installed WebLogic 8.1SP2, its directory locations are mapped to variables used by the Advanced Configurator Server and Visual Modeler. These directory locations are important to the proper installation and operation of the PeopleSoft Enterprise Advanced Configurator Server.

Don’t move WebLogic 8.1SP2 to another directory. If you must change its location, uninstall it and re-install rather than moving the WebLogic directories.

Changing the WebLogic System Password

PeopleSoft recommends you install the PeopleSoft Enterprise Advanced Configurator Server before changing the WebLogic password. See Task 8-3 in this chapter for detailed instructions.

Uninstalling WebLogic

Select the un-install utility provided by WebLogic 8.1SP2 as follows: Start, Programs, BEA WebLogic E-Business Platform, WebLogic Server 8.1SP2, Uninstall WebLogic Server 8.1SP2 (SP2).

Task 8-3: Install the PeopleSoft Enterprise Advanced Configurator Server

This section describes how to install the PeopleSoft Enterprise Advanced Configurator Server on a Windows Server system.

The installation of PeopleSoft Enterprise Advanced Configurator Server includes the optional creation of database tables if needed. However, the database and connectivity must already exist. The database can be the PeopleSoft Enterprise CRM database if you are installing with other PeopleSoft Enterprise CRM applications.

PeopleSoft Enterprise Advanced Configurator Server installation allows you to specify the port number of the Advanced Configurator database if it is different from the default setting. Check with your database administrator if you are not sure of the appropriate port setting.

Note. Before proceeding with PeopleSoft Enterprise Advanced Configurator Server installation, install the custom PeopleSoft Enterprise Advanced Configurator database or PeopleSoft Enterprise CRM database. Make sure the database has a user login with permission to create tables.

To Install the PeopleSoft Enterprise Configuration Server:

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

2. If you have not already installed WebLogic, do so now. See Task 8-2 in this chapter for detailed instructions.

3. Log in as a Windows Server Administrator. If you are installing the PeopleSoft Enterprise Advanced Configurator WebLogic server in addition to an existing WebLogic server used for another application, install it in a separate location, such as \bea_cfg\ rather than the default \bea.

4. Download resolution number 643929 from Customer Connection.

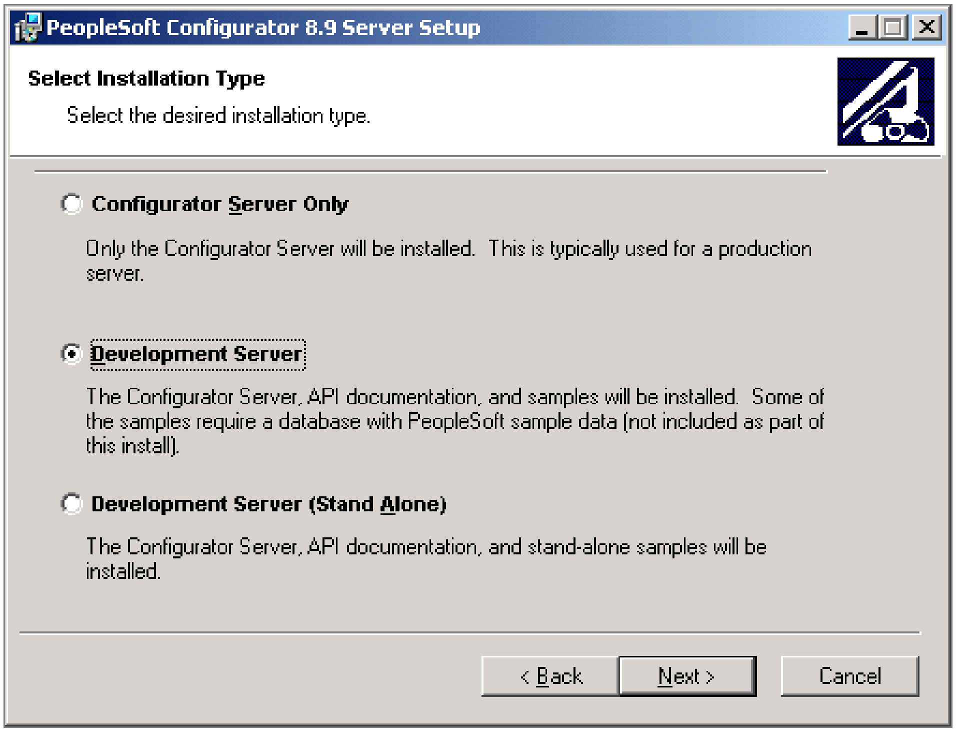
5. Run UPD643929.exe and extract the files to c:\temp

6. From the C:\TEMP\UPD643929\Install\Server\Windows directory, run Setup.exe

7. Double-click on Setup.exe.

8. Select Next on the Welcome screen.

9. Accept the license agreement and click Next. The Select Installation Type dialog appears:



Select Installation Type dialog

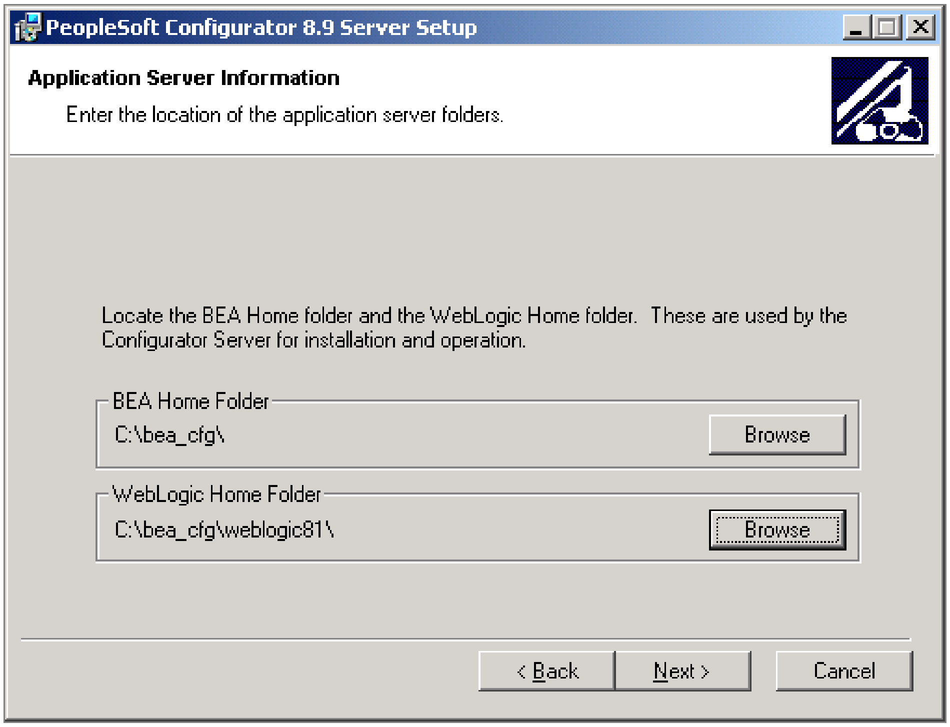
10. Choose an install option (see field definitions below) and click Next.

Install Option	Definition
Advanced Configurator Server only	To set up a production server.
Development Server	To view or develop using samples that pull data from a PeopleSoft CRM database.
Development Server (Stand Alone)	To view or develop using samples that don't require data from a PeopleSoft Enterprise CRM database.

11. The User Information dialog appears.

12. Select the option that allows the appropriate level of access to the PeopleSoft Enterprise Advanced Configurator Server to anyone who uses the machine or to anyone who uses the system ID that you logged in with.

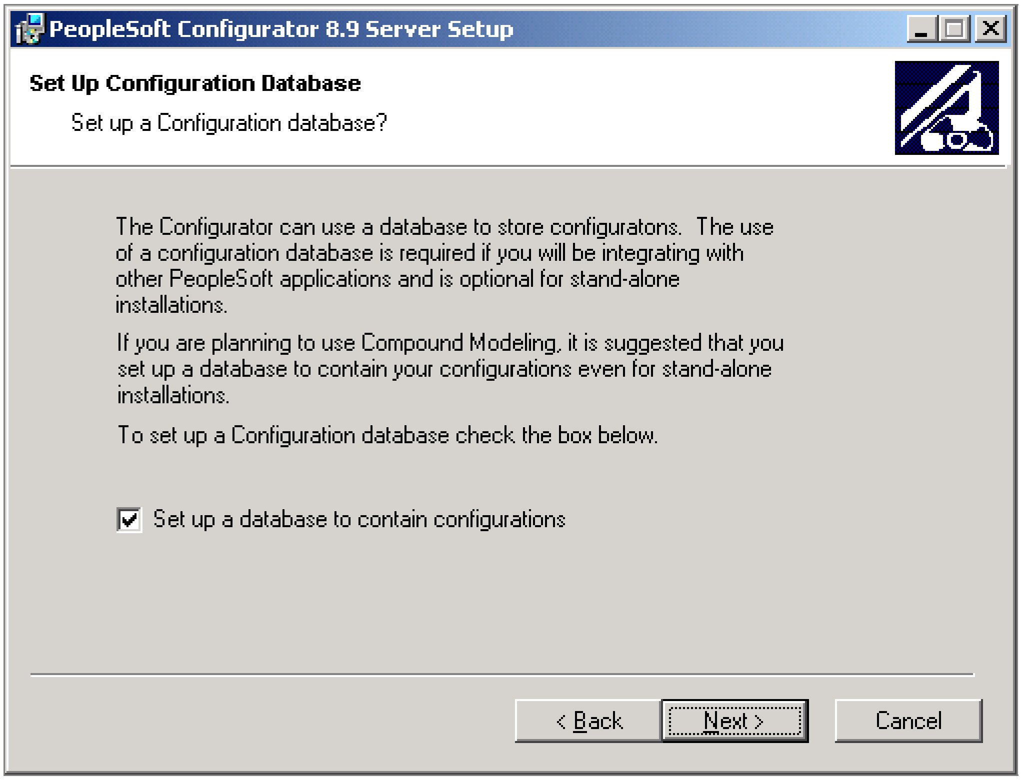
13. Click Next. The Application Server Information dialog appears:



Application Server Information dialog

14. If you are using another directory for the WebLogic 8.1SP2 server, or if you are using an existing WebLogic 8.1SP2 installation with another application, select its location with the Browse buttons.

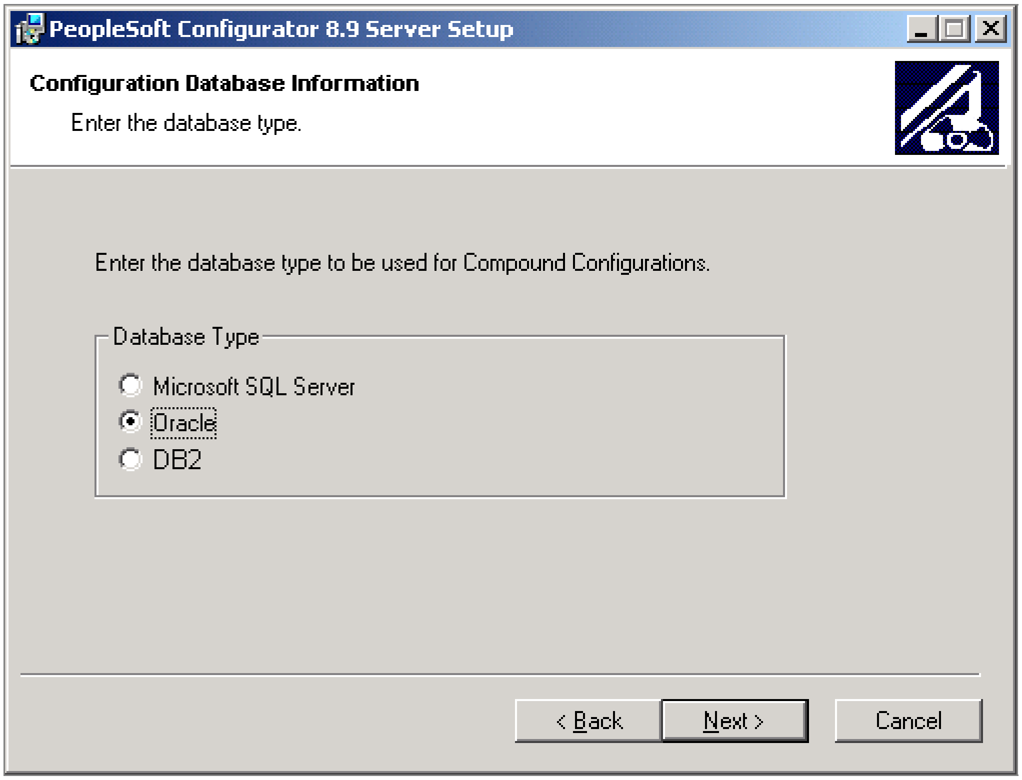
15. Click Next. The Set Up Configuration Database dialog appears:



Set Up Configuration Database dialog

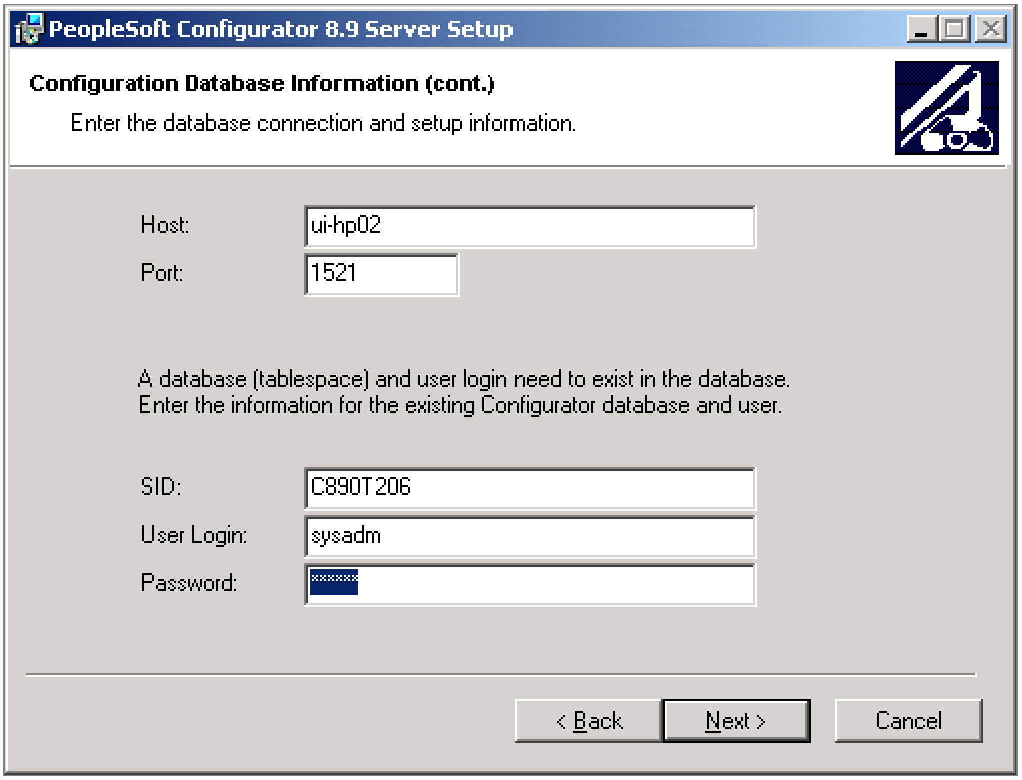
16. Select the check box and click Next. The Configuration Database Information dialog appears.

> **Note.** For concurrent PeopleSoft Enterprise CRM installations, select “Set up a database to contain configurations” if you are integrating with other PeopleSoft applications.



Configuration Database Information dialog

17. Select the database that you are running. Click Next to continue this dialog.



Configuration Database Information dialog

18. Enter the database information for the database that you intend to use for configuration and model data.

    For concurrent PeopleSoft Enterprise CRM installations - If you want to use the PeopleSoft Enterprise CRM database for PeopleSoft Enterprise Advanced Configurator data, enter the hostname and port for the server where it resides, and enter the system administrator login and password.

19. Click Next to complete the installation setup. It is not necessary to reboot the system when installation is complete.

- Advanced Configurator Server installation creates the following directories: \bea\weblogic81\config\CalicoDomain\applications\CalicoApp\Web-inf\:

    config\
    dtd\
    lib\
    logs\
    models\
    namodels\
    nastructures\
    sql\
    structures\
    tmp\

- In addition, installation-specific files are located in: \bea\weblogic81\config\CalicoDomain\install\

  cpsampfiles.cmd

  install.jar

  install.properties

  installprops.log

  InstWLISVLic.cmd

  isv.jar

  license_isv.bea

  propupdate.cmd

- The file installprops.log contains information about setup during installation (including error messages if any errors occurred). The system administrator can use propupdate.cmd and install.properties to re-run setup to aid in future troubleshooting or information gathering.

> **Note.** For database connection pooling purposes, the t3servername property has been added to the LEDBAccess.properties file.
>
> The t3servername property has a default value of 'myserver' upon install. If the weblogic 8.1 server is installed or reconfigured with a server name other than 'myserver' the t3servername property in LEDBAccess.properties needs to be updated to reflect the actual server name.
>
> The LEDBAccess.properties file is located at: <Weblogic81_Home>\config\CalicoDomain\applications\CalicoApp\Web-inf\config.

Once the PeopleSoft Enterprise Advanced Configurator Server is installed, you can change the default WebLogic system Password.

Changing the WebLogic System Password

To Change the WebLogic System Password:

1. Select **Start, Programs, PeopleSoft Applications, Advanced Configurator, Advanced Configurator Server** to make sure PeopleSoft Enterprise Advanced Configurator server is running.

2. Go to the WebLogic management console:

   http://<host_name>:7777/console

3. Log in as user=system and password=<your password>.

4. Click the Users link under Compatibility Security.

5. Under “Change a User’s Password” (to the far right side of the page), enter:

Field Definition	Field Value
Name	System
Old Password	system
Confirm Password	<new password>

6. Click the Change button.

7. Click on “The changes you have made must be saved to the realm implementation.”

8. Stop the PeopleSoft Enterprise Advanced Configurator Server by running stopConfigurator.cmd from the server prompt.

9. Locate startConfigurator.cmd and stopConfigurator.cmd in\bea\weblogic81\config\CalicoDomain and change set WLS_PW=weblogic to set WLS_PW=<the new password>

10. If you have configured the PeopleSoft Enterprise Advanced Configurator Server as a service, you must re-register the service (having changed startConfigurator.cmd):

    Execute the following commands from the directory where `startConfigurator.cmd` resides:

    - startConfigurator.cmd remservice
    - startConfigurator.cmd cfgservice

11. Restart the service from the Control Panel or reboot the system.

Un-installing the Configuration Server

Before you un-install the PeopleSoft Enterprise Advanced Configurator Server, first un-install Visual Modeler, if it is present on the server. (Use the Control Panel’s Add/Remove utility to un-install Visual Modeler.)

To un-install the PeopleSoft Enterprise Configuration Server:

1. If you plan to re-install after un-installing, back up `startConfigurator.cmd` to preserve any changes made to the file in the course of development.

2. Use the Add/Remove Programs utility of Windows to un-install the PeopleSoft Enterprise Advanced Configurator Server.

If you are re-installing and use a listen port for WebLogic other than 7777, be sure to re-specify the port, as the install process will reset it to the default 7777.

Task 8-4: Start and Configure the PeopleSoft Enterprise Advanced Configurator Server

Once you have installed the WebLogic application server and the PeopleSoft Enterprise Advanced Configurator Server, you need to start the PeopleSoft Enterprise Advanced Configurator Server.

Starting the PeopleSoft Enterprise Advanced Configurator Server properly sets up the necessary system environment variables for the JDK/JRE, WebLogic 8.1SP2, and the PeopleSoft Enterprise Advanced Configurator Server.

There are three ways to start the PeopleSoft Enterprise Advanced Configurator Server:

- Select **PeopleSoft Applications, Advanced Configurator, Advanced Configurator Server** from the Start/Programs menu.
- Run the startConfigurator.cmd file within a command prompt or from Windows.
- If the server is running as a Windows service, use the Services utility.

To Set Up the PeopleSoft Enterprise Advanced Configurator to Run as a Service:

Once you have installed both the WebLogic server and the PeopleSoft Enterprise Advanced Configurator Server, you can set up PeopleSoft Enterprise Advanced Configurator Server to run as a service.

1. Open a command prompt window.
2. At the prompt, change to \bea\weblogic81\config\CalicoDomain, the WebLogic directory containing startConfigurator.cmd.
3. Run the startConfigurator cfgservice script C:\bea\wlservice8.1SP2\config\CalicoDomain > startConfigurator cfgservice.

   Running this script:

   - Specifies the appropriate settings
   - Registers the server as a Windows Server service.
   - Installs the WebLogic server as a service under the name “PeopleSoft Enterprise Advanced Configurator Server.”
   - Queries the Windows Server Registry for the WebLogic installation location.
   - Opens the Service Control Manager.
   - Installs the service executable C:\bea\weblogic81\bin\beasvc.exe.

To Run the PeopleSoft Enterprise Advanced Configurator as a Service:

1. To start the service, either reboot the server (the service is set to automatic), or use the Control Panel utility.
2. Select **Start, Settings, Control Panel, Administrative Tools, Services**.

3. Look for “PeopleSoft Enterprise Advanced Configurator Server” in the list of services for the system.

Note. To remove the service, run c:\bea\weblogic81\config\CalicoDomain > startConfigurator remservice.

Re-setting the Port

To Change the Server Port:

1. Open the WebLogic administration console for the Calico Domain:

   (http://<hostname>:7777/console)

2. Select **CalicoDomain, Servers, myserver.**

3. In the General Tab, enter a new value for Listen Port.

4. Click the Apply button and restart the PeopleSoft Enterprise Advanced Configurator Server.

Setting the XML Encoding Option (optional)

Product configuration data created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter to the web.xml file.

Note. PeopleSoft 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:

   bea\weblogic81\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 your desired encoding in the param-value element; Shift-JIS is used here as an example.


```
<init-param>
      <param-name>encoding</param-name>
      <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.

5. Restart the Advanced Configurator server.

Task 8-5: Prepare to Install PeopleSoft Enterprise Advanced Configurator on Solaris 2.8 or 2.9

This section describes the minimum hardware, software, database, and client browser requirements that your system needs to meet to install this release on a Solaris 2.8 or 2.9 system.

In addition, this task provides you with reference information that is useful to know before installing this release of the PeopleSoft Enterprise Advanced Configurator Server.

Note. The recommended product load order requires that WebLogic 8.1SP2 and the PeopleSoft Enterprise Advanced Configurator Server be loaded before any further Weblogic Service Packs are applied. PeopleSoft Enterprise Advanced Configurator Server may not work or even install properly if you do not follow this load order.

Hardware and Software Requirements

The following stated requirements in this section represent the minimum necessary for installing and using the PeopleSoft Enterprise Advanced Configurator Server on a Solaris 2.8 or 2.9 system.

Minimum Hardware Requirements for the PeopleSoft Enterprise Advanced Configurator Server on Solaris 2.8 or 2.9:

- Sun Microsystems UltraSPARC™ 450-MHz (or faster) dual-processor system:
    - 512 MB of RAM10 GB of available hard drive spaceSolaris 2.8 or 2.9
    - BEA Systems WebLogic Application Server 8.1SP2, with Service Pack 2 (which you can install from the PeopleSoft CRM CD-ROM set)
    - Sun Microsystems Java Development Kit (JDK) 1.4.1
    - Netscape Enterprise Server™ 6.0

Note. See http://www.sun.com/software/solaris/ for updates to Solaris 2.8 or 2.9.

Note. The Java® Development Kit is included as part of the WebLogic 8.1SP2 installation.

Browser Requirements for Client on Solaris 2.8 or 2.9

Netscape Navigator™ 6.x (version 6.0 not recommended or supported)

Supported Databases

If you plan to develop or deploy a compound model, set up the database for it before you install the PeopleSoft Enterprise Advanced Configurator Server. However, if you only need a database for external model data, you can set it up later.

This release of the PeopleSoft Enterprise Advanced Configurator Server supports one database type for use on a Solaris 2.8 or 2.9 platforms.

The supported database for the PeopleSoft Enterprise Advanced Configurator Server on Solaris 2.8 or 2.9:

Oracle 9i

> **Note.** PeopleSoft Enterprise Advanced Configurator supports the UNICODE character set by default. See Task 8-8 in this chapter “Setting the XML Encoding Option” for information on how to specify other character sets.

Database Setup Overview

The database configuration information in this section is general in nature and assumes that you have already identified the type of database configuration you need. If not, you must contact your database administrator (DBA) for more information prior to installing and configuring your Oracle database before you install the PeopleSoft Enterprise Advanced Configurator Server.

> **Note.** This guide is not intended to replace the knowledge or assistance of an experienced Oracle database administrator.

Database Server Requirements

The database server can be a different system than the one where the PeopleSoft Enterprise Advanced Configurator Server components are installed.

The database server you use with the PeopleSoft Enterprise Advanced Configurator Server must meet the following requirements:

- Allow the database user account to make a minimum of 100 concurrent connections to the system.
- Support 50 dedicated concurrent connections.
- Set the value for the maximum number of extents for rollback segments to support 150 or more.

Database Configuration Requirements

You must create a user account specifically for the PeopleSoft Enterprise Advanced Configurator Server and the tablespace must be the default location for this user account. The System Identifier (SID) for the database account must have the necessary read-write permissions to create and drop tables or indexes, and to insert, select, delete, or update any table in the dedicated tablespace.

Make a note of the tablespace, user ID (the Connect ID for PeopleSoft CRM applications) and password. You need to refer to them during the PeopleSoft Enterprise Advanced Configurator Server installation.

Task 8-6: Install the WebLogic Application Server on Solaris 2.8 or 2.9

You must install WebLogic 8.1SP2 from the PeopleSoft CRM CD-ROM set; do not use another installation of WebLogic 8.1SP2.

Note. For more detailed information, see http://edocs.bea.com/platform/docs81/install/index.html

To Install the WebLogic Application Server 8.1 SP2 on Solaris 2.8 or 2.9:

1. Make sure that you have created a WebLogic user account (the default user is “weblogic”), and verify that you can log on as the WebLogic user before you attempt to install WebLogic 8.1SP2.

2. Make sure that you have created a group for the WebLogic user (the default group is “weblogic”) and set permissions for it.

Note. Record the username and group permissions you use during setup. You may need to refer to them when you install the PeopleSoft Enterprise Advanced Configurator Server.

3. Change directory to the AppSrvr/Solaris directory on the temp directory created in task 8-3.

4. Execute *one* of the following:

   - $ sh /weblogic812_solaris32.bin (for GUI mode install)
   - $ sh ./weblogic812_solaris32.bin-mode=console (for console mode install)

5. Unzip the included patch file weblogic812_solaris32.bin into the directory where you installed WebLogic ($HOME/bea/weblogic81). It overwrites a number of files.

Note. If you are installing the Advanced Configurator WebLogic server in addition to an existing WebLogic server, install it in a separate location, such as “$HOMEt/bea_cfg” instead of “$HOME/bea.”

Once you have installed WebLogic 8.1SP2 for the Advanced Configurator on your system, all of their directory locations are mapped to variables used by the Advanced Configurator Server. These directory locations are important to proper installation and to the operation of the Advanced Configurator Server.

Once the Advanced Configurator Server is up and running, do not move JDK, JRE, or WebLogic files to another directory location. If you do, you must reinstall the Advanced Configurator Server.

Un-Installing the WebLogic Server

To un-install WebLogic, you can either remove the entire bea directory (if WebLogic is the only BEA product installed), or use the WebLogic un-install utility.

For more information about this utility, see
http://edocs.bea.com/platform/docs81/install/uninstal.html#1035105

Task 8-7: Install the PeopleSoft Enterprise Advanced Configurator Server on Solaris 2.8 or 2.9

This section describes the process for installing the Advanced Configurator Server on a Solaris 2.8 or 2.9 systems.

The installation of Advanced Configurator Server includes the optional creation of database tables. However, the database and connectivity must already exist. The database can be the PeopleSoft Enterprise CRM database if you're installing with other PeopleSoft Enterprise CRM applications.

Advanced Configurator Server installation allows you to specify the port number of the Advanced Configurator database if it is different from the default setting. Check with your database administrator if you're not sure of the appropriate port setting.

Note. Before proceeding with Advanced Configurator Server installation, install the custom Advanced Configurator database or PeopleSoft CRM database. Make sure the database has a user login with permission to create tables.

To Install the Advanced Configurator Server on Solaris 2.8 or 2.9:

1. If WebLogic 8.1SP2 is not yet installed on the system, do so now before proceeding. For more information, see Task 8-6 in this chapter, "Install the WebLogic Application Server on Solaris 2.8 or 2.9".
2. Download resolution number 643929 from Customer Connection to a Windows client machine.
3. Run UPD643929.exe and extract the files to c:\temp
4. Copy the directory C:\TEMP\UPD643929\Install\Server\Solaris directory to your Solaris server
5. Navigate to Server/Solaris/ to run the Configurator Server script, install.sh.
6. Follow the instructions to install and configure the server and database connection.

- If you want to use a license other than the one provided with the installation, you have the option to choose a PeopleSoft ISV license during installation.
- You should update the license if you installed WebLogic from the PeopleSoft distribution CD. If you already have a running WebLogic installation and you are installing Advanced Configurator into it, you may not want to update the license. Check with your WebLogic administrator.
    - If you wish to install a newer, supported Weblogic Service Pack, you may install it now.

Warning: Do not install Advanced Configurator Server into the PeopleTools WebLogic application server.

Note. In this release, WebLogic 8.1SP2 installs JDK 1.4.1 in its directory structure. The default path to the JDK is `/$HOME/bea/weblogic81/jdk1.4.1_05.`

When installation is complete, there will be thirteen new directories:

/$HOME/bea/weblogic81/config/CalicoDomain/applications/CalicoApp/

Web-inf/

config/

dtd/

lib/

logs/

models/

namodels/

nastructures/

sql/

structures/

xsd/

web.xml

weblogic.xml

Change the WebLogic System Password

Changing the WebLogic system password is recommended for production systems.

To Change the Default WebLogic System Password:

1. Go to the WebLogic management console

   http://<host_name>:7777/console

2. Log in as user=*system*, and password=<*old WebLogic system password*>

3. Click on the Users link under Security.

4. Under "Change a User's Password" (to the far right side of the page), enter:

Field Definition	Value
Name	System
Old Password	< old WebLogic system password >
Confirm Password	< new WebLogic system password >

5. Click the Change button.

6. Click the link "The changes you have made must be saved to the realm implementation."

7. Stop the server.

8. In startConfigurator.sh and stopConfigurator.sh, change WLS_PW=<old WebLogic password> to WLS_PW=<new password>.

Un-installing the PeopleSoft Enterprise Advanced Configurator Server

To Un-install the PeopleSoft Enterprise Advanced Configurator Server:

1. Stop the Advanced Configurator Server.

2. Remove the <bea home>/weblogic81/config/CalicoDomain directory.

Task 8-8: Start and Configure the PeopleSoft Enterprise Advanced Configurator Server on Solaris 2.8 or 2.9

Once you have installed WebLogic 8.1SP2 and the Advanced Configurator Server, start the Advanced Configurator Server. A startup script file, `startConfigurator.sh`, is provided.

There are two ways to call `startConfigurator.sh`:

- Manually – Issue the startConfigurator.sh command on the command line.
- Automatically – Use the Solaris 2.8 or 2.9 daemon to start this script file once the system is running.

When startConfigurator.sh script file is called, it sets up all the necessary system environment variables for the WebLogic server, the JDK, and the Advanced Configurator Server.

The startConfigurator.sh script file performs the following tasks for you:

- Sets the appropriate system variables for the JDK.
- Sets the appropriate system variables for the Advanced Configurator Server.
- Defines a Java classpath for WebLogic.
- Starts the PeopleSoft Enterprise Advanced Configurator Server.

To Start the PeopleSoft Enterprise Advanced Configurator Server from the Command Line:

1. Log in as the WebLogic user.

2. Change directory to the location of the Advanced Configurator Server using this command:

```
# cd /$HOME/bea/weblogic81/config/CalicoDomain
```


3. Start the script file by using this command: `./startConfigurator.sh`.

   The script starts the Advanced Configurator Server.

Note. To start and run the server in the background, use the command `nohup ./startConfigurator.sh &`

To Stop the startConfigurator Script File from the Command Line:

1. Log in as the WebLogic user.

2. Change directory to the location of the Advanced Configurator Server using this command:

   ```
   # cd /$HOME/bea/weblogic81/config/CalicoDomain
   ```

3. Start the script file with the command: `/stopConfigurator.sh`

   This stops the Advanced Configurator Server.

To Run the PeopleSoft Enterprise Advanced Configurator Server Automatically:

Follow the steps below to set up the Advanced Configurator Server to start automatically when the Solaris 2.8 or 2.9 system starts.

1. Log in as root.

2. Create a file called Advanced Configurator_ctl in /etc/init.d. The file looks like this (with CONFIG_HOME modified as needed for your system):

```
#!/sbin/sh
        CONFIG_HOME=/$HOME/bea/weblogic81/config/CalicoDomain
case "$1" in
'start')
        echo 'starting Advanced Configurator Server.'
        su - weblogic -c "cd $CONFIG_HOME; ./startConfigurator.sh 1>/dev/null 2>&1" &
        ;;
'stop')
        echo 'stopping Advanced Configurator Server.'
        su - weblogic -c "cd $CONFIG_HOME; ./stopConfigurator.sh 1>/dev/null 2>&1" &
        ;;
*)
        echo "Usage $0 { start | stop }"
        ;;
exit 0
```

3. Link the Advanced Configurator_ctl file to the /etc/rc 3.d directory:

   # ln Advanced Configurator_ctl /etc/rc3.d/K99configurator

```
# ln Advanced Configurator_ctl /etc/rc3.d/S99configurator
```

Re-setting the Port

To Change the Server Port:

1. Open the WebLogic Administration console for the Calico Domain:

   (http://<hostname>:7777/console).

2. Select **CalicoDomain, Servers, myserver**.

3. In the General tab, enter a new value for Listen Port.

4. Click the Apply button and restart the Advanced Configurator Server.

Setting the XML Encoding Option (Optional)

Product configuration data created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter in the solution using the WebLogic Console.

> **Note.** PeopleSoft recommends using the default UTF-8 or changing the encoding to specify Internet Assigned Numbers Authority (IANA) encoding name.

To Change XML Output Encoding (Optional):

1. Open the file web.xml for editing. It is located at:

   bea\weblogic81\config\CalicoDomain\applications\CalicoApp\Web-inf

2. Locate these lines in the XML file:

```
<servlet>
        <servlet-name>copxml</servlet-name>
        <servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet</
                servlet-class>
```

3. Create a new sub-element of the <servlet> element called <init-param>.

   Other sub-elements called <init-param> may already exist; do not modify them. Input the desired encoding in the param-value element; Shift-JIS is used here as an example:

```
<init-param>
```



```
        <param-name>encoding</param-name>
        <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.

5. Restart the Advanced Configurator server.

Task 8-9: Install 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 Windows environment.

To compile a model, the Visual Modeler needs access to an Advanced Configurator Server, which can be local or remote.

In addition, if model data is stored externally in a database, you can specify the connection in Visual Modeler. This chapter describes the system requirements and information you need to gather before installing Visual Modeler.

This section describes the system requirements and information you need to gather before installing Visual Modeler.

Visual Modeler Hardware and Software Requirements

Visual Modeler runs only on Windows operating systems.

Hardware Requirements

Single-processor 400-Mhz Pentium system with:

- 200 MB of hard drive space
- 256 MB RAM

Software Requirements

Windows 2000 or Windows XP

Windows Client Requirements

One of the following browsers:

- Netscape Navigator™ 6.x or greater (version 6.0 not recommended or supported)
- Microsoft Internet Explorer™ 5.x and 6.x

Supported Databases

Use of the Visual Modeler does not require a database installed on your system. However, if you want to use external data within your models, the Visual Modeler supports the following databases on a Windows 2000 platform.

Supported databases include:

- Microsoft SQL Server 2000
- Oracle 9i
- DB2 UDB 8.1

To Install the PeopleSoft Visual Modeler:

1. If WebLogic 8.1SP2 or the Advanced Configurator Server is not yet installed on a server, do so now before proceeding.

> **Note.** Visual Modeler is not included with resolution 643929, it must be installed from the distribution CD as described below.

2. Log in as Windows Administrator or as a user with administrative privileges.
3. Insert the CRM 8.9 CD-ROM in the drive (of a Windows machine).
4. Double-click setup.exe to launch the installation.
5. Click Next. The License Agreement dialog appears.
6. Accept the license agreement and click Next. The Select Database dialog appears.
7. Select the type of database you will be using.
8. If you are prompted to select Unicode or non-Unicode; choose appropriately according to your database setup.

   The Server Selection dialog appears.
9. If you are installing only Advanced Configurator, select only PeopleSoft File Server. Otherwise, select PeopleSoft File Server and any other PeopleSoft servers you wish to install.

   The Directory Selection dialog appears.
10. Choose the directory in which to install the Visual Modeler installer.

    The Product Selection dialog appears.
11. If you want to install only Advanced Configurator, clear the check boxes of all products except PeopleSoft Advanced Configurator. Otherwise, select PeopleSoft Advanced Configurator and any other products you want to install.

The PeopleSoft Visual Modeler installer is copied to the directory you specified earlier.

12. Navigate to that directory, and within it, navigate to $PS_HOME/setup/Advanced Configurator/ViM.

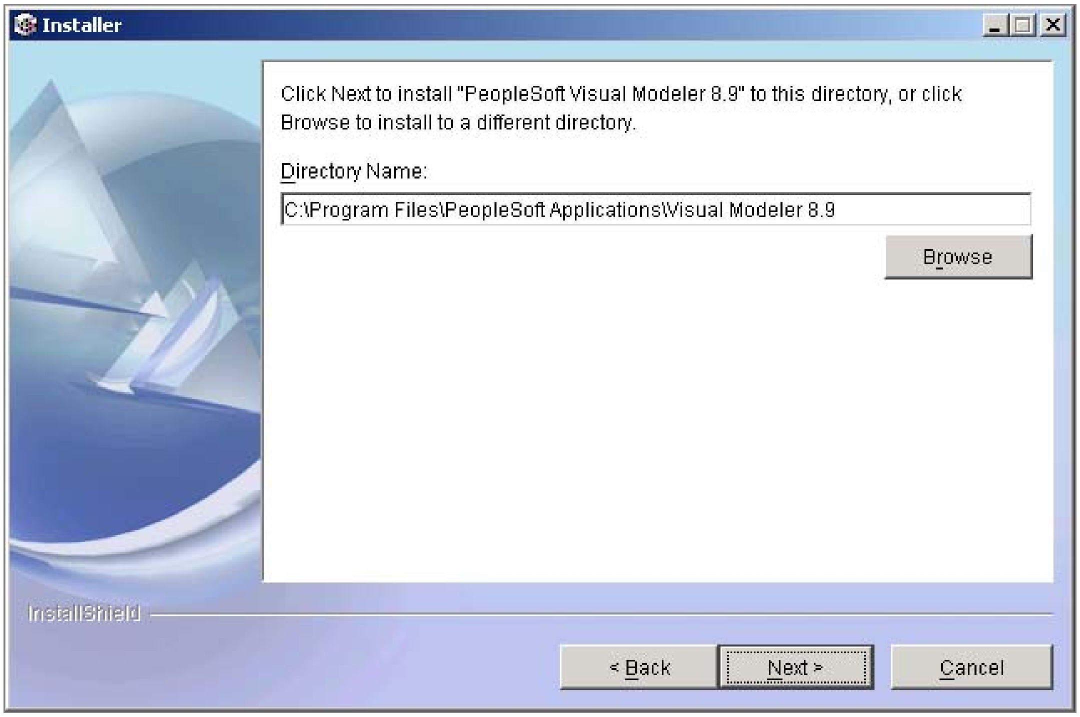
13. Double-click on VisualModeler_setup.exe to launch the installation.

    The Welcome screen appears:

Visual Modeler InstallShield Wizard dialog

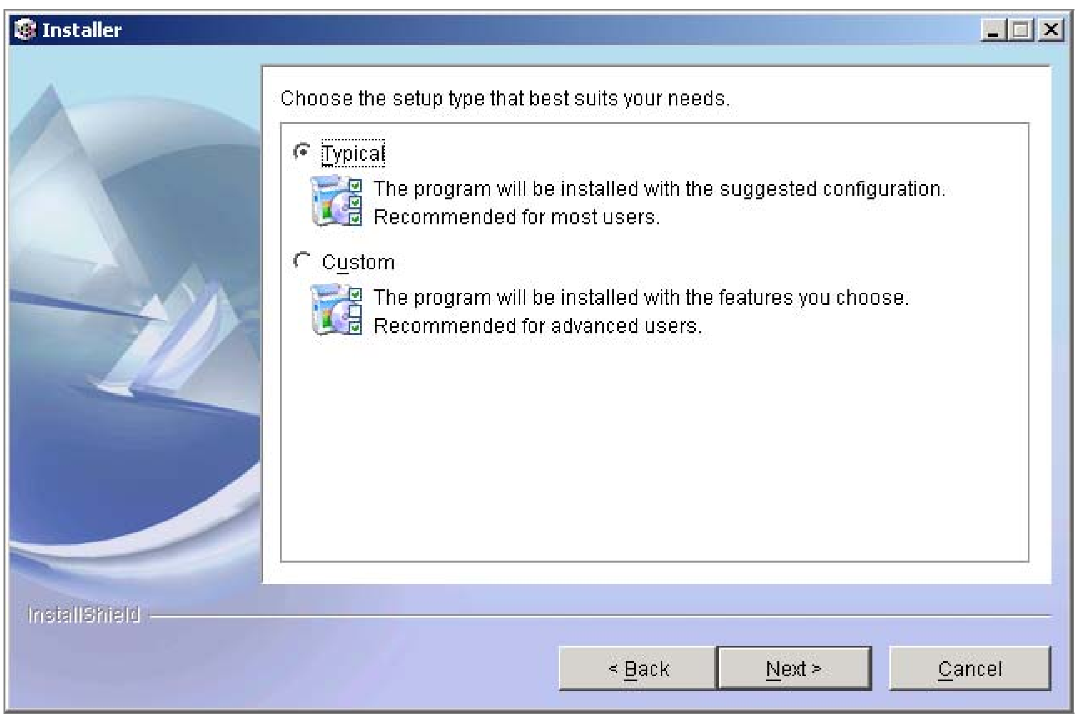
14. Click Next.

    The License agreement dialog appears. By default, files are installed in C:\Program Files\PeopleSoft Applications\ Visual Modeler 8.9.



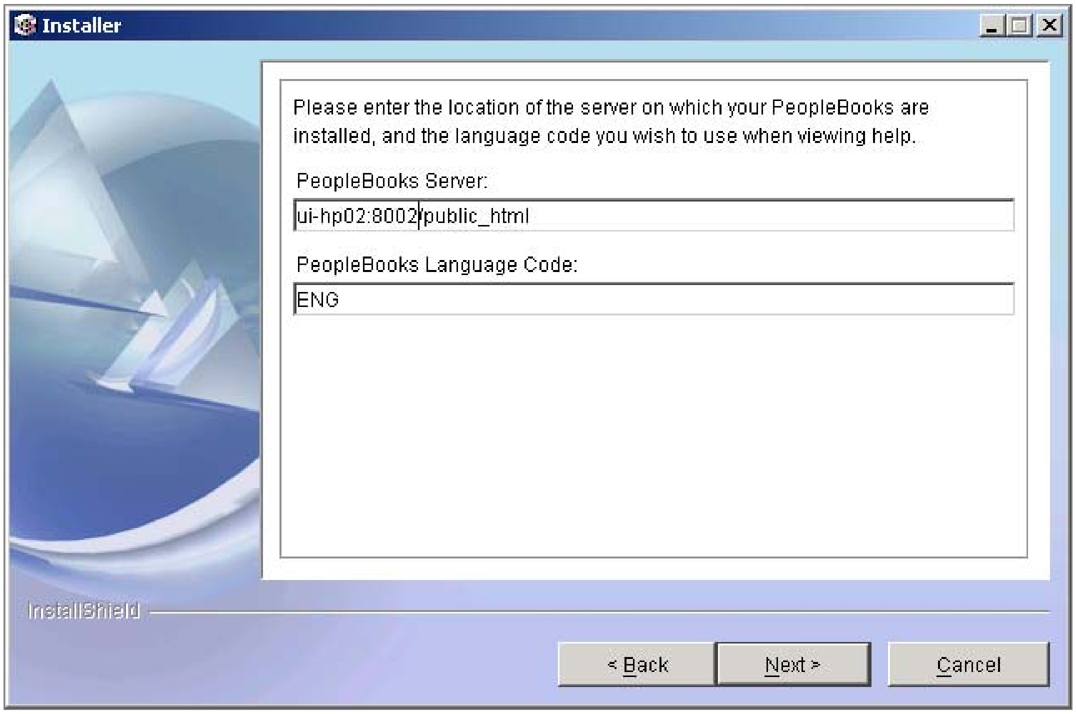
Visual Modeler Installer dialog

15. Select Typical or Custom install:



SetUp Type Selection dialog

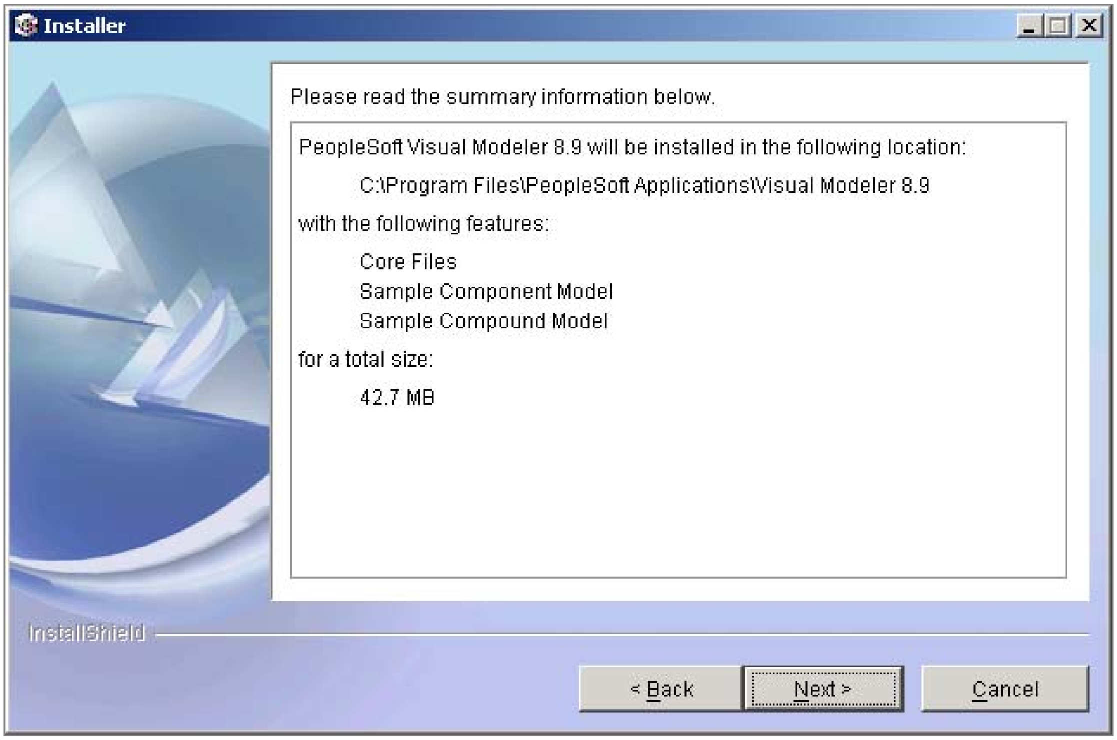
16. Enter the location of the server on which PeopleBooks are installed:



Installer Location dialog

17. Click Next.

The Summary Information Dialog appears:



Summary Information Dialog

18. Click Next to continue.

    Installation begins.

Note. There is no need to reboot the system when installation is finished.

Un-installing the PeopleSoft Visual Modeler

To Un-install the PeopleSoft Visual Modeler:

Use the Control Panel's Add/Remove Programs utility to un-install Visual Modeler. The un-install program removes the Visual Modeler files from your system. Files generated while using the product remain intact.

Task 8-10: Install the PeopleSoft Enterprise Mobile Advanced Configurator

PeopleSoft Enterprise Mobile Configurator consists of two component applications:

- **Mobile Configurator Packaging Tool—**for the *model administrator* to use to create a single installation executable that will load a ready-to-use configuration application (Solution) on a mobile user's machine.
- **Mobile Configurator Client—**for the *mobile user* to run the Solution application (provided by the Packaging Tool) for product configuration and configuration management, which includes local storage, upload, and download.

The PeopleSoft Mobile Configurator Packaging Tool and the Mobile Configurator Client are independent of the WebLogic application server, the Advanced Configurator Server, the Visual Modeler, and each other. Both are utility-like applications that enable a mobile user in the field to configure products without being connected to enterprise resources. Once a model(s) is built and its web application interface created (a Solution) using PeopleSoft Advanced Configurator Server and Visual Modeler, the Packaging Tool makes it possible to package the Solution files for distribution to the field. The Mobile Configurator Client helps the mobile user launch the Solution application and manage the resulting configurations.

This section describes the system requirements and information you need to gather before installing either of these two applications.

Minimum System Requirements

PeopleSoft Mobile Configurator applications run only on Windows operating systems. The minimum system requirements for PeopleSoft Mobile Configurator components are as follows:

- Single-processor 400-Mhz Pentium system with:
  - 200 MB of hard drive space
  - 256 MB RAM
- Windows 2000 (Packaging Tool)
- Windows 2000
- Microsoft Internet Explorer™ 5.5 or greater

To Install the PeopleSoft Mobile Configurator Packing Tool:

1. Log in as Windows Administrator or as a user with administrative privileges.

2. Go to the Windows Explorer to the $PS_HOME\setup\Mobile Configurator\Administration directory.

3. Double-click Setup.exe to launch the installation.

4. Follow the prompts on the installation dialog to install the application. By default, files are installed in C:\Program Files\PeopleSoft Applications\ Configurator\.

You can launch the Packaging Tool by selecting **Start, Programs, PeopleSoft Applications, Advanced Configurator, Packaging Tool.** An administration user guide is provided in the Help menu of the application and in PDF format in the \Guide directory of the CD-ROM.

Creating a Distributable Client Installer

Mobile Configurator Client must be installed on a mobile user's machine in order to create configurations from packaged Solutions. The Solution Installers created by the Packaging Tool do not include the Client.

The Client is distributable for use by the mobile user. While it can be installed directly from the PeopleSoft CD-ROM, the installation files also can be copied to other media, posted to an FTP site, or emailed as an attachment.

The PeopleSoft Advanced Configurator Client installer uses the Microsoft Installer sub-system included with the Windows 98 and Windows 2000 operating systems.

This installation consists of the four files located in the \Client directory of the CD-ROM. Depending on your requirements; you may need to distribute one, two, or all four files.

The installation files are:

- Setup.exe – Installation executable that installs all necessary files for the Mobile Configurator Client application. This installer checks for the presence of the required .msi installer and installs the .msi if needed, then launches the Microsoft Installer with the Setup.msi.
- Setup.msi – Microsoft Installer database for the Mobile Configurator Client application.
- Setup.ini - Contains configuration attributes for Setup.exe.
- instmsiw.exe - Microsoft Installer Subsystem installer. Used to install the subsystem on machines that require it.

For Media or Other Non-Web Distribution:

Copy these files to the media:

- Setup.exe
- Setup.msi
- Setup.ini
- instmsiw.exe

Instruct the intended user to install using Setup.exe.

For Web Distribution

If users might need the Microsoft Installer subsystem installed or upgraded, create a page that downloads these files:

- Setup.exe
- Setup.msi
- Setup.ini
- instmsiw.exe

If you know that users have the Microsoft Installer on their machines, post this file for download:

- Setup.msi

Note. Be sure to double-click on Setup.exe to install.

To Install the PeopleSoft Mobile Configurator Client:

User installation instructions for the Mobile Configurator Client are as follows:

1. If you have not already installed WebLogic, do so now.
2. Log in as a Windows 2000 Server Administrator.

3. Insert the PeopleSoft CRM CD-ROM in the drive.

4. Double-click on Setup.exe. The Welcome screen appears.

InstallShield Wizard dialog

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 you will be using. You may then be asked to choose Unicode or non-Unicode; choose appropriately according to your database setup. The Server Selection dialog appears

8. If you are installing only Advanced Configurator, choose only PeopleSoft File Server. Otherwise, choose PeopleSoft File Server and any other PeopleSoft servers you wish to install.

   The Directory Selection dialog appears.

9. Choose the directory into which to copy the Advanced Configurator installers. If you are installing other PeopleSoft products, choose your PeopleTools directory here. The Product Selection dialog appears.

10. If you want to install only Advanced Configurator, clear the check boxes of all products except PeopleSoft Advanced Configurator. Otherwise, select PeopleSoft Advanced Configurator and any other products you wish to install.

    The PeopleSoft Advanced Configurator installer will be copied to the directory you specified in step 9. Navigate to that directory.

11. Navigate to the $PS_HOME\setup\MobileConfigurator\Client directory.

    The User Information dialog appears.

12. Destination Folder Appears. The Default destination is c:\Program Files\Peoplesoft Applications\Mobile Configurator.

13. Click Next to complete the installation setup. It is not necessary to reboot the system when installation is complete.

Files are installed by default in C:\Program Files\PeopleSoft Applications\Mobile Advanced Configurator

You can launch the Client by selecting **Start, Programs, PeopleSoft Applications, Mobile Configurator, Advanced Configurator**. A user guide is provided in the Help menu of the Client application.

Un-installing PeopleSoft Mobile Configurator Components

Use the Control Panel's Add/Remove Programs utility to un-install either the Mobile Packaging Tool or the Mobile Configurator Client.

The un-install program removes the Mobile Configurator files from your system. Files generated while using the product remain intact.

Task 8-11: Installing for Integration to PeopleSoft Enterprise Order Capture

This section describes how to install and set up the components necessary to integrate the PeopleSoft Enterprise Advanced Configurator web application with PeopleSoft Enterprise Order Capture. Once setup is complete, a user creating an order can launch a configuration session from an order entry line, configure a product, and return to the Order Capture page with the updated product information.

To Install Integration to PeopleSoft Enterprise Order Capture:

1. Install the WebLogic application server for Advanced Configurator.

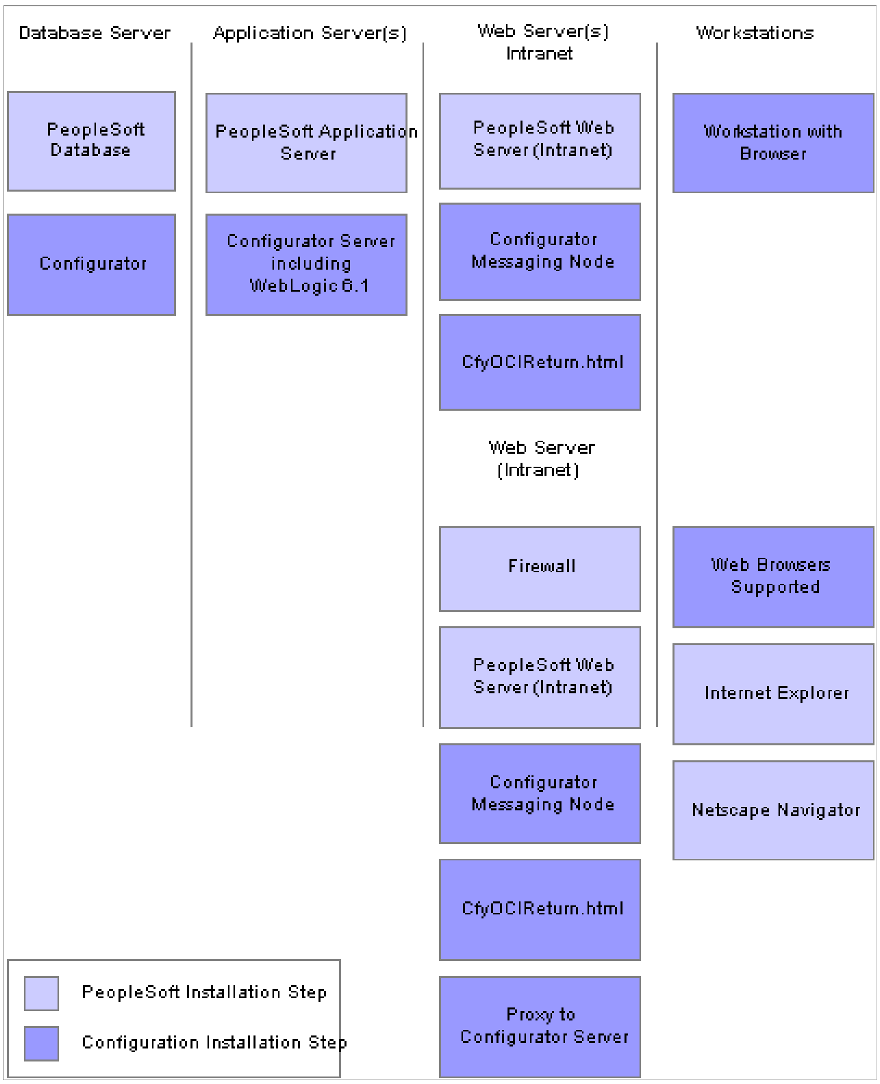
2. Install the Advanced Configurator Server.

3. Set up the Advanced Configurator Server.

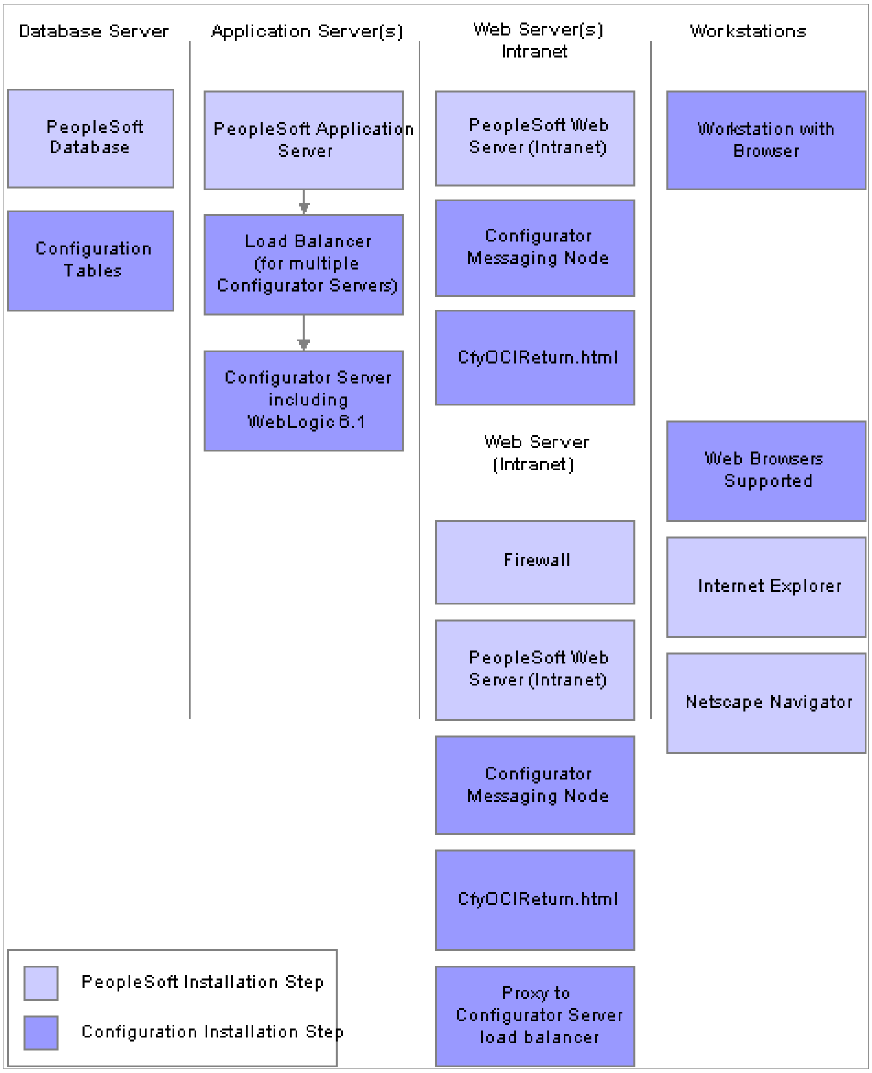
4. Set up proxy servers, if required.

Recommended Architecture for PeopleSoft Enterprise Advanced Configurator Integration with PeopleSoft Enterprise Order Capture

The following diagrams represent the recommended architecture:



Recommended architecture for low volume environments



Recommended architecture for high volume environments

To Install PeopleSoft Advanced Configurator for Integration:

1. Install BEA WebLogic Server 8.1SP2.

> **Note.** PeopleSoft recommends installing BEA WebLogic Server 8.1SP2 for the Advanced Configurator Server in a separate BEA instance on your PeopleSoft web server (for example, c:\bea_cfg instead of the default c:\bea) to ensure that the correct version of the BEA application server is used for your Advanced Configurator Server. For better performance, you can install the Advanced Configurator Server on a separate application server from your PeopleSoft web server. You can also use a load balancer to add additional Advanced Configurator Servers to the system.

2. Install the PeopleSoft Enterprise Advanced Configurator Server on your PeopleSoft web server.

> **Note.** When running the PeopleSoft Enterprise Advanced Configurator installation, you must select the option to set up a database to contain configurations. Enter the database information for your CRM database.

3. If you are using PeopleTools version 8.43 or less, copy CfgOCIReturn.html from the CalicoApp directory on your Advanced Configurator Server to your PeopleSoft Web Server Portal home location. (PeopleTools versions after 8.43 provide this file in the proper location.)

   For example, if you installed to default locations, you would copy CfgOCIReturn.html from C:\bea_cfg\weblogic81\config\CalicoDomain\applications\CalicoApp on your Advanced Configurator Server, to C:\bea\weblogic81\config\peoplesoft\applications\PORTAL on your PeopleSoft Web Server.

4. If required, set up a proxy to the PeopleSoft Enterprise Advanced Configurator Server.

Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

For implementations that use a PeopleSoft Web Server outside a firewall, an additional installation step is required.

By default, the Advanced Configurator Server is set up to listen on port 7777. Most implementations will not open this port in the firewall, so any requests that contain 7777 in their URL (for example, http://ps_config_server_ip:7777/copxml) will result in an error indicating that the page can't be found.

The solution is to proxy (that is, redirect) certain requests from the PeopleSoft Web Server that is outside the firewall to the PeopleSoft Advanced Configurator Server inside the firewall. When the PeopleSoft Web Server receives a request with an URL known to the proxy setup, it will redirect the request to the PeopleSoft Advanced Configurator Server.

For example, a request of http://ps_web_server_ip/copxml will be redirected to the PeopleSoft Advanced Configurator Server. The 7777 suffix is not included in the URL, so there are no issues with firewall permission.

The following URLs require proxy setup in an installation of a PeopleSoft Web Server outside a firewall:

http://*ps_config_server_ip*:7777/copxml

http://*ps_config_server_ip*:7777/solutions/*

http://*ps_config_server_ip*:7777/calico/*

http://*ps_config_server_ip*:7777/solutionlist

http://*ps_config_server_ip*:7777/ConfigServerInfo/*

Example Proxy Setup for WebLogic Server

Insert the following text into the web.xml file for the PeopleSoft Web Server (The default location is c:\bea\weblogic81\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. All solutions should be installed under this directory:

<servlet-mapping>

<servlet-name>ProxyServlet</servlet-name>

<url-pattern>/solutions/*</url-pattern>

</servlet-mapping>

C H A P T E R 9

INSTALLING PEOPLESOFT ENTERPRISE MOBILE SALES FOR WAP PHONES 8.9

This chapter provides instructions for installing the PeopleSoft Enterprise Mobile Sales for WAP Phones component with PeopleSoft Enterprise CRM 8.9. The instructions assume that you have already installed and configured the PeopleSoft Enterprise Sales application.

Note. Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook*.

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 9-1	Create an Application Server Domain
Task 9-2	Update start.wml
Task 9-3	Configure Security

Before You Begin

Following are several requirements for using PeopleSoft Enterprise Sales or Mobile Sales for WAP Phones, as well as recommendations to enhance usability and performance for the WAP Phones component:

- Your installation must include PeopleSoft Enterprise Mobile Sales.
- You must have PeopleSoft Internet Architecture installed. Mobile applications support is installed every time in PeopleTools 8.45.
- The wireless device on which you intend to run the PeopleSoft Enterprise Mobile Sales for WAP Phones component must support WAP (Wireless Application Protocol) capabilities.
- Your PeopleSoft Enterprise Mobile Sales for WAP Phones web server must be accessible from the Internet. This enables your carrier's WAP gateway to locate the web server from the Internet.
- PeopleSoft recommends that when you define user IDs and passwords for your mobile sales users, you consider keypad usability.

  For example, a user ID or password that contains special characters, combinations of upper and lowercase characters, and all uppercase or alphanumeric combinations can significantly slow the sign on process. PeopleSoft recommends using all lower case user ids for WAP users.

> **Note**. For more information about setting up PeopleSoft Enterprise Sales, see the *PeopleSoft Enterprise Sales 8.9 PeopleBook*.

Task 9-1: Create an Application Server Domain

Although it is not required, for security and performance reasons, PeopleSoft recommends that you create an application server domain specifically for your PeopleSoft Enterprise Mobile Sales for WAP Phones component.

> **Note.** For more information about creating application server domains, see the *PeopleTools 8.45 Installation and Administration* guide for your database.

Task 9-2: Update start.wml

You must update the start.wml file to enable your users to locate the PeopleSoft Enterprise Mobile Sales for WAP Phones main Internet script and the correct portal and node.

To Update start.wml:

1. Locate start.wml in the corresponding webserver directory.

   - For example, if your web server is WebLogic, look in c:\<PS_HOME>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

- If your web server is WebSphere, look in c:\<PS_HOME>\webserv\<cellname_nodename_servername>\<domain.ear>\PORTAL\WEB-INF\psftdocs\ps

2. Open start.wml in a text editor.

3. Find the line that begins with "go href=".

4. Replace the word "portal" with "EMPLOYEE".

5. Replace the word "node" with the name of the Message Node that you have defined as Local in your system.

6. Replace the string "WEBLIB_QE_MCD.QE_MCD_MAIN" with: "WEBLIB_WAP.WAP_RSF_MAIN".

   If your Message Node is PSFT_CR then the final version of this line would look like this:

```
<go href="<%=servletLoc%>EMPLOYEE/PSFT_CR/s/WEBLIB_WAP.WAP_RSF_MAIN.FieldFormula.iScript_main" />
```

7. Save the file and reboot your web server.

Task 9-3: Configure Security

PeopleSoft Enterprise Mobile Sales for WAP Phones is delivered with a CRWS1100 permission list, which contains all of the Internet scripts used by the PeopleSoft Enterprise Mobile Sales for WAP Phones product. An additional permission list, CRWS1000, contains all of the component interfaces used by PeopleSoft Enterprise Mobile Sales for WAP Phones.

To authorize users to access the PeopleSoft Enterprise Mobile Sales for WAP Phones component, add the CRWS1000 and CRWS1100 permission lists to the roles to which you will assign your mobile sales representatives.

To Add the CRWS1000 and CRWS1100 Permission Lists to a Role:

1. Sign on to your PeopleSoft Enterprise CRM website with your web browser.

2. Select **PeopleTools, Security, Permissions & Roles, Roles.**

3. Specify a role.

   For example, specify Field Sales Rep.

4. Click Permission Lists.

5. Click on a plus (+) sign to add a permission list.

6. Specify CRWS1000 in the Permission List field and press TAB.

7. Click on a plus (+) sign to add a permission list.

8. Specify CRWS1100 in the Permission List field and press TAB.

9. Click Save.

> **Note**. If you receive a Duplicate Key Value message "duplicate entries not allowed", the permission list already exists. Click OK and proceed.

CHAPTER 10

SETTING UP THIRD PARTY INTEGRATIONS FOR PEOPLESOFT ENTERPRISE ORDER CAPTURE AND PEOPLESOFT ENTERPRISE ORDER CAPTURE SELF-SERVICE 8.9

This chapter provides instructions for installing the third-party applications that are used with PeopleSoft Enterprise Order Capture and PeopleSoft Enterprise Order Capture Self-Service.

Note. Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook*.

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

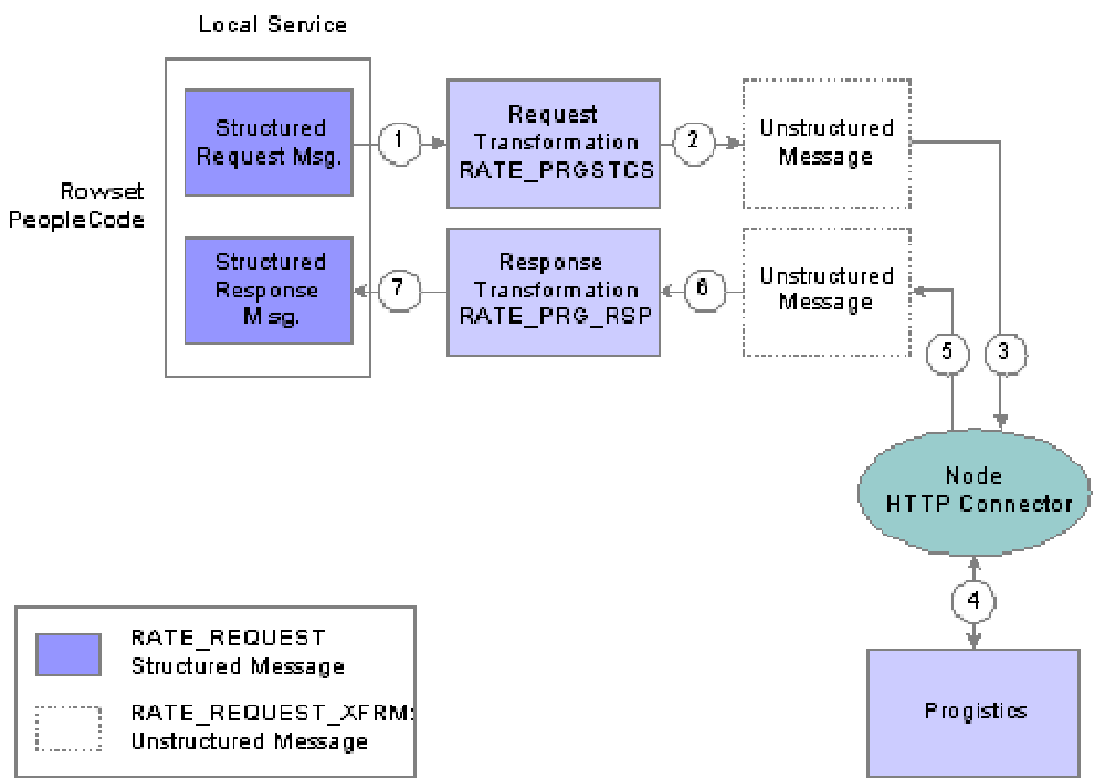
Task Overview

The following table summarizes this chapter's tasks.

Task No.	Task Name
Task 10-1	Set Up PeopleSoft Freight Calculation Integration
Task 10-2	Set Up Business Interlink Architecture for Tax Integration
Task 10-3	Install and Test Taxware and Vertex Databases
Task 10-4	Set Up Integration With Taxware WorldTax

Task 10-1: Set Up PeopleSoft Freight Calculation Integration

PeopleSoft integrates to the Connectship Progistics application for freight calculation. Application messaging is used to communicate to the Progistics Freight Server. The following graphic represents the typical message flow between PeopleSoft and the Connectship Progistics application:



Message Flow Between PeopleSoft and the Connectship Progistics

The following outlines the setup necessary within PeopleSoft CRM for the integration.

To Set Up PeopleSoft Freight Calculation:

1. Activate the following application messages using PeopleSoft Application Designer. Open the message definition, and check the Active flag on the Use tab of the message properties:

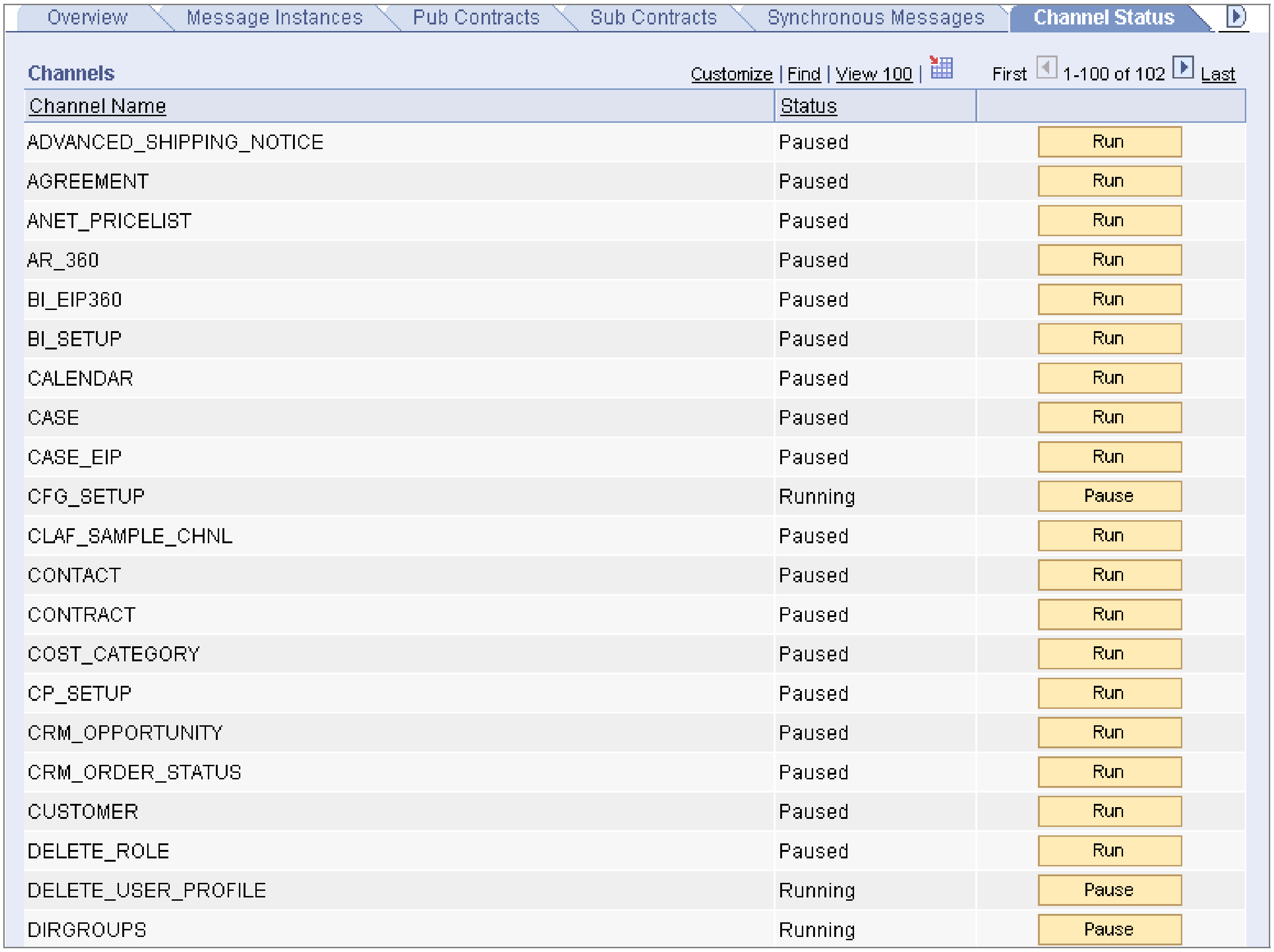
- RATE_REQUEST
- RATE_REQUEST_XFRM
- RATE_RESPONSE

2. Once users have been given security permissions, confirm that the ALLPAGES permission list has full permission to the FREIGHT channel as follows:

   - Select **PeopleTools, Security, Permissions & Roles, Permission Lists**
   - Open the permission list for "ALLPAGES"
   - Go to the "Message Monitor" tab and look for an entry for FREIGHT
   - If not found, add a new entry for FREIGHT channel with Full access.
   - Save your changes.

3. Activate the FREIGHT channel as follows:

   - Select **PeopleTools, Integration Broker, Monitor, Monitor Message.**
   - Select the Channel Status tab.
   - Locate the FREIGHT channel name, and set the status to Running by clicking the corresponding Run button, if the channel status is currently Paused.



Overview | Message Instances | Pub Contracts | Sub Contracts | Synchronous Messages | Channel Status

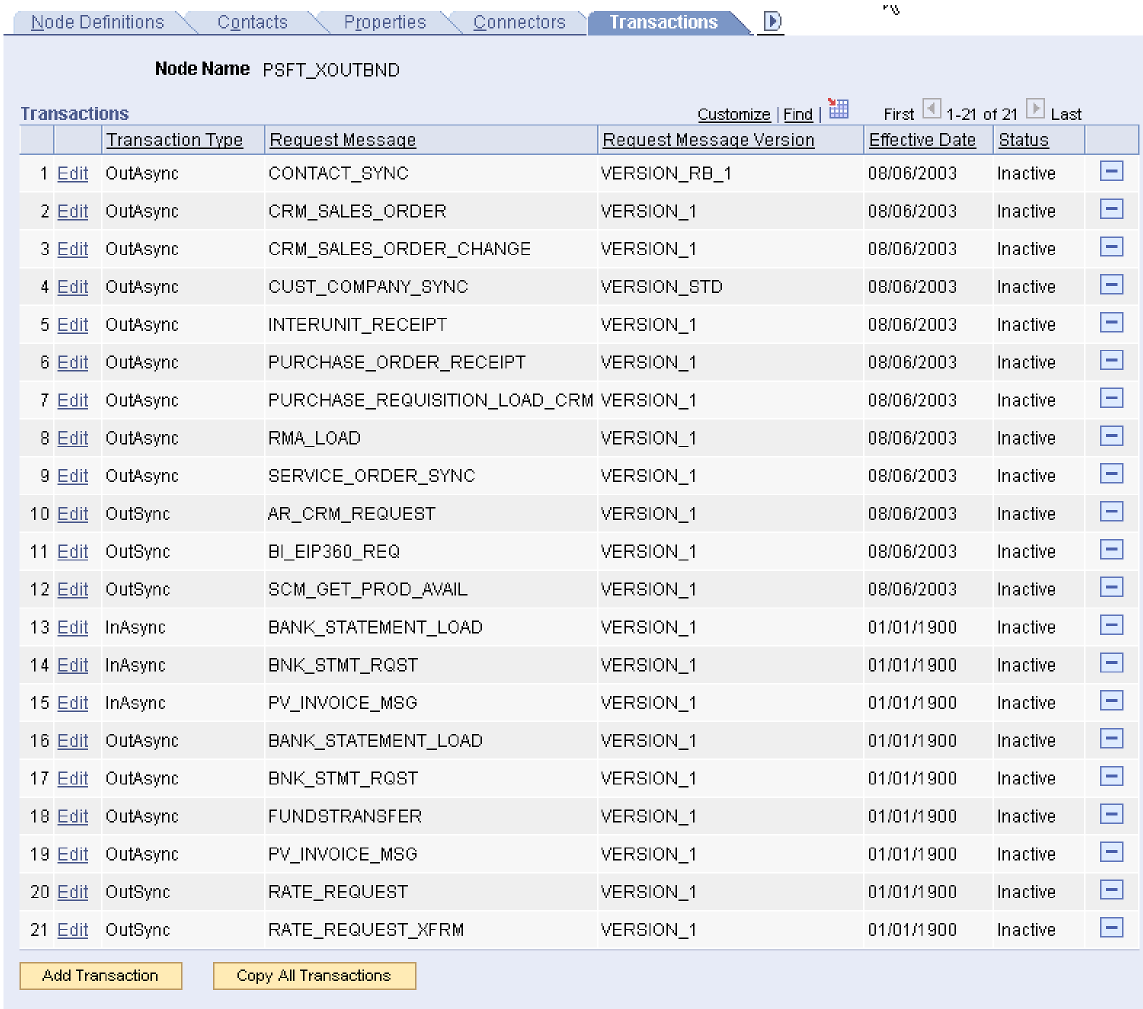
Channels Customize | Find | View 100 | First 1-100 of 102 Last

Channel Name	Status	
ADVANCED_SHIPPING_NOTICE	Paused	Run
AGREEMENT	Paused	Run
ANET_PRICELIST	Paused	Run
AR_360	Paused	Run
BI_EIP360	Paused	Run
BI_SETUP	Paused	Run
CALENDAR	Paused	Run
CASE	Paused	Run
CASE_EIP	Paused	Run
CFG_SETUP	Running	Pause
CLAF_SAMPLE_CHNL	Paused	Run
CONTACT	Paused	Run
CONTRACT	Paused	Run
COST_CATEGORY	Paused	Run
CP_SETUP	Paused	Run
CRM_OPPORTUNITY	Paused	Run
CRM_ORDER_STATUS	Paused	Run
CUSTOMER	Paused	Run
DELETE_ROLE	Paused	Run
DELETE_USER_PROFILE	Running	Pause
DIRGROUPS	Running	Pause

Channel Status page

4. Activate the OutSync Node Transactions for RATE_REQUEST as follows:

- Select **Peopletools, Integration Broker, Node Definitions** to open the Node Definition PSFT_XOUTBND.
- Go to the Transactions tab, locate RATE_REQUEST and click Edit.
- Change the status value = active.
- Click Save.



Node Definitions | Contacts | Properties | Connectors | Transactions

Node Name PSFT_XOUTBND

Transactions Customize | Find | First 1-21 of 21 Last

		Transaction Type	Request Message	Request Message Version	Effective Date	Status	
1	Edit	OutAsync	CONTACT_SYNC	VERSION_RB_1	08/06/2003	Inactive	
2	Edit	OutAsync	CRM_SALES_ORDER	VERSION_1	08/06/2003	Inactive	
3	Edit	OutAsync	CRM_SALES_ORDER_CHANGE	VERSION_1	08/06/2003	Inactive	
4	Edit	OutAsync	CUST_COMPANY_SYNC	VERSION_STD	08/06/2003	Inactive	
5	Edit	OutAsync	INTERUNIT_RECEIPT	VERSION_1	08/06/2003	Inactive	
6	Edit	OutAsync	PURCHASE_ORDER_RECEIPT	VERSION_1	08/06/2003	Inactive	
7	Edit	OutAsync	PURCHASE_REQUISITION_LOAD_CRM	VERSION_1	08/06/2003	Inactive	
8	Edit	OutAsync	RMA_LOAD	VERSION_1	08/06/2003	Inactive	
9	Edit	OutAsync	SERVICE_ORDER_SYNC	VERSION_1	08/06/2003	Inactive	
10	Edit	OutSync	AR_CRM_REQUEST	VERSION_1	08/06/2003	Inactive	
11	Edit	OutSync	BI_EIP360_REQ	VERSION_1	08/06/2003	Inactive	
12	Edit	OutSync	SCM_GET_PROD_AVAIL	VERSION_1	08/06/2003	Inactive	
13	Edit	InAsync	BANK_STATEMENT_LOAD	VERSION_1	01/01/1900	Inactive	
14	Edit	InAsync	BNK_STMT_RQST	VERSION_1	01/01/1900	Inactive	
15	Edit	InAsync	PV_INVOICE_MSG	VERSION_1	01/01/1900	Inactive	
16	Edit	OutAsync	BANK_STATEMENT_LOAD	VERSION_1	01/01/1900	Inactive	
17	Edit	OutAsync	BNK_STMT_RQST	VERSION_1	01/01/1900	Inactive	
18	Edit	OutAsync	FUNDSTRANSFER	VERSION_1	01/01/1900	Inactive	
19	Edit	OutAsync	PV_INVOICE_MSG	VERSION_1	01/01/1900	Inactive	
20	Edit	OutSync	RATE_REQUEST	VERSION_1	01/01/1900	Inactive	
21	Edit	OutSync	RATE_REQUEST_XFRM	VERSION_1	01/01/1900	Inactive	

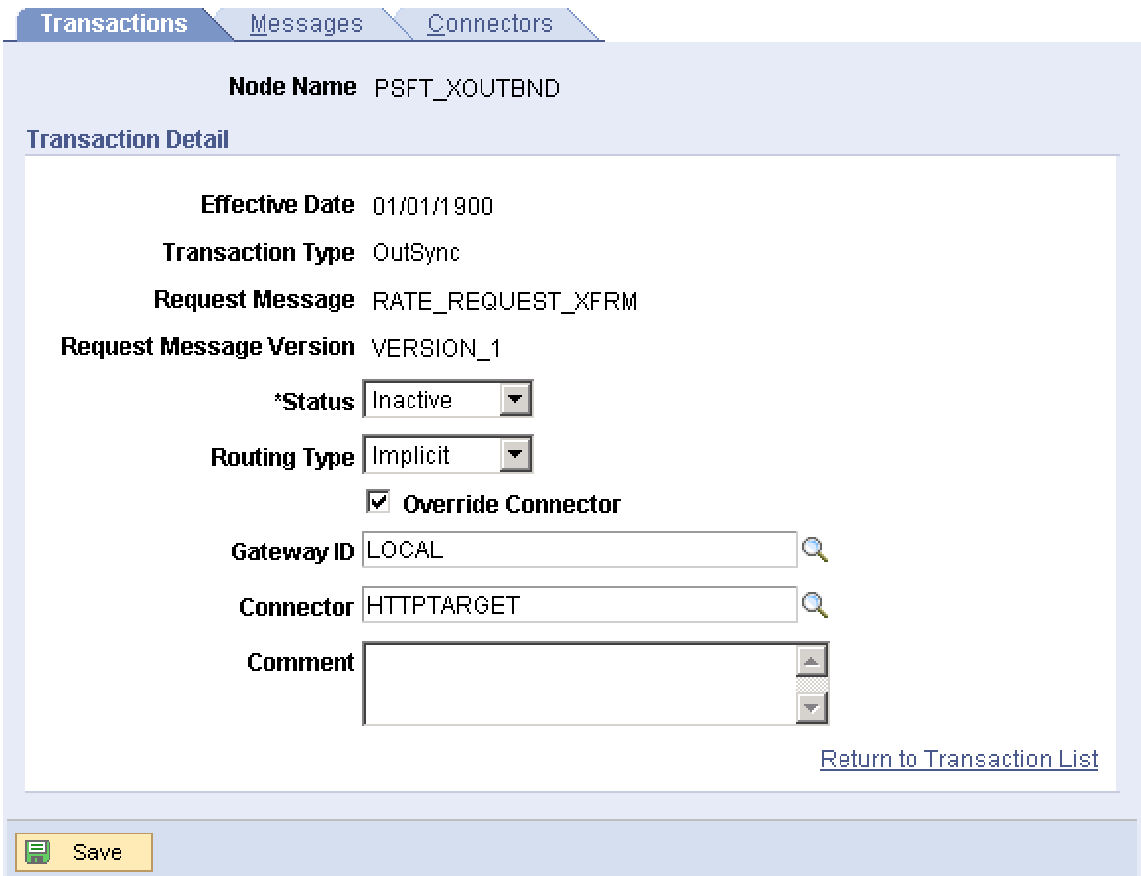
Add Transaction | Copy All Transactions

5. Activate the OutSync Node Transaction RATE_REQUEST_XFRM as follows:

- Select **Peopletools, Integration Broker, Node Definitions** to open the Node Definition PSFT_XOUTBND.

  This transaction uses an HTTPTARGET Override connector and allows you to specify the URL to connect to Progistics.

- Go to the Transactions tab, locate RATE_REQUEST_XFRM and click Edit.
- Change the status value = active.
- Click Save.



Transactions page

6. Go to the Connectors tab for the RATE_REQUEST_XFRM transaction. Replace the URL on the RATE_REQUEST_XFRM Node Transaction with your Progistics server URL. This URL will appear as follows, replacing <progisticsserver> with your Progistics server machine name: http://<progisticsserver>/Progistics/XML_Processor/Server/XMLProcDLL.asp

7. If you are not using port 80 on the Progistics server, indicate the port in this URL – ie. <machine>:8080, or whatever port number you are using.

- If there are no properties pages appearing in the connectors field, the GATEWAY has not been setup. To setup the gateway, complete the following:

a) Select **PeopleTools, Integraton Broker, Gateways**.

b) Click Search,

c) Enter the URL: http://<webserver>:<port>/PSIGW/PeopleSoftListeningConnector,

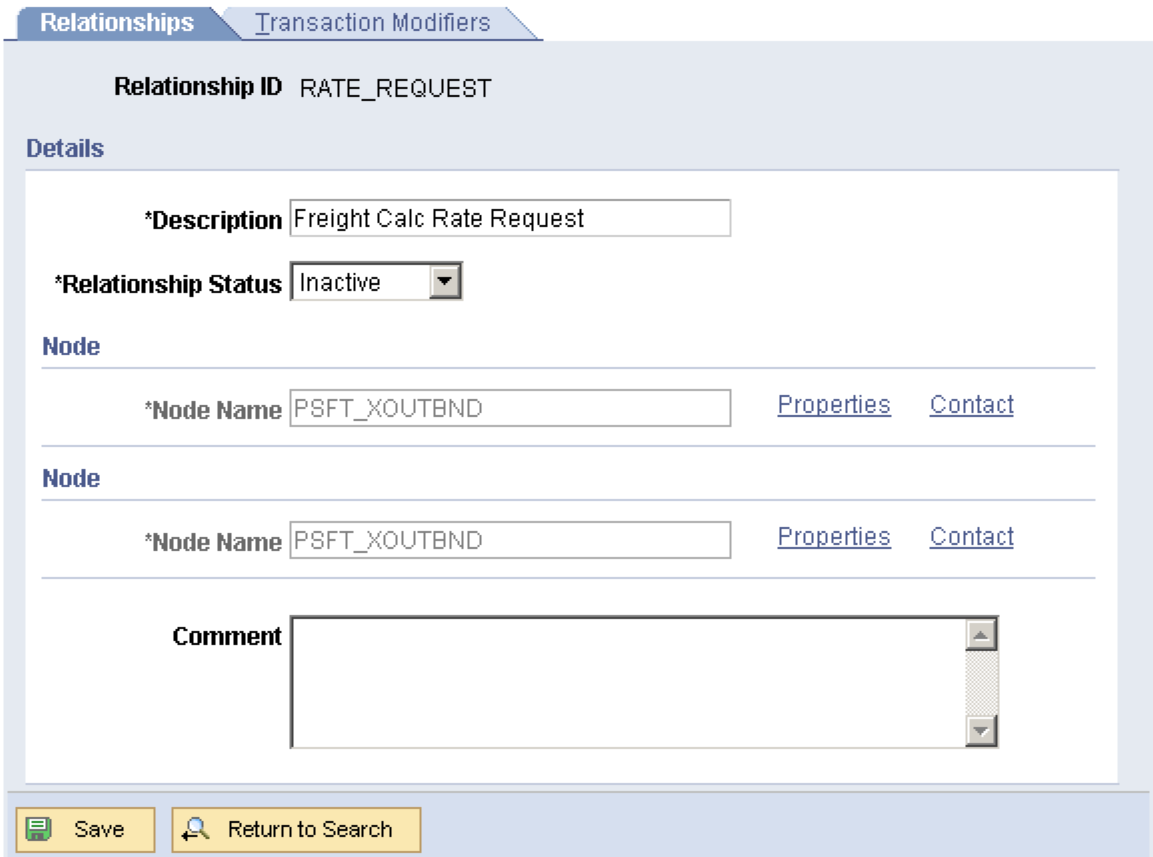
d) Click Load Gateway Connectors.

e) Click Save.

8. Select **PeopleTools, Integration Broker, Relationships** to activate the Relationship RATE_REQUEST.

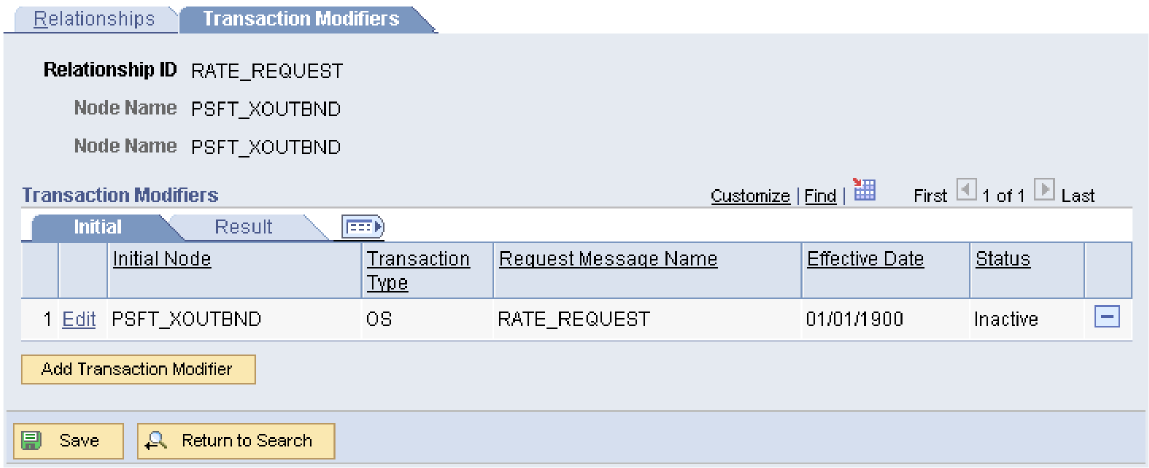
9. Change the Relationship Status field to Active.

10. Click Save.



Node page

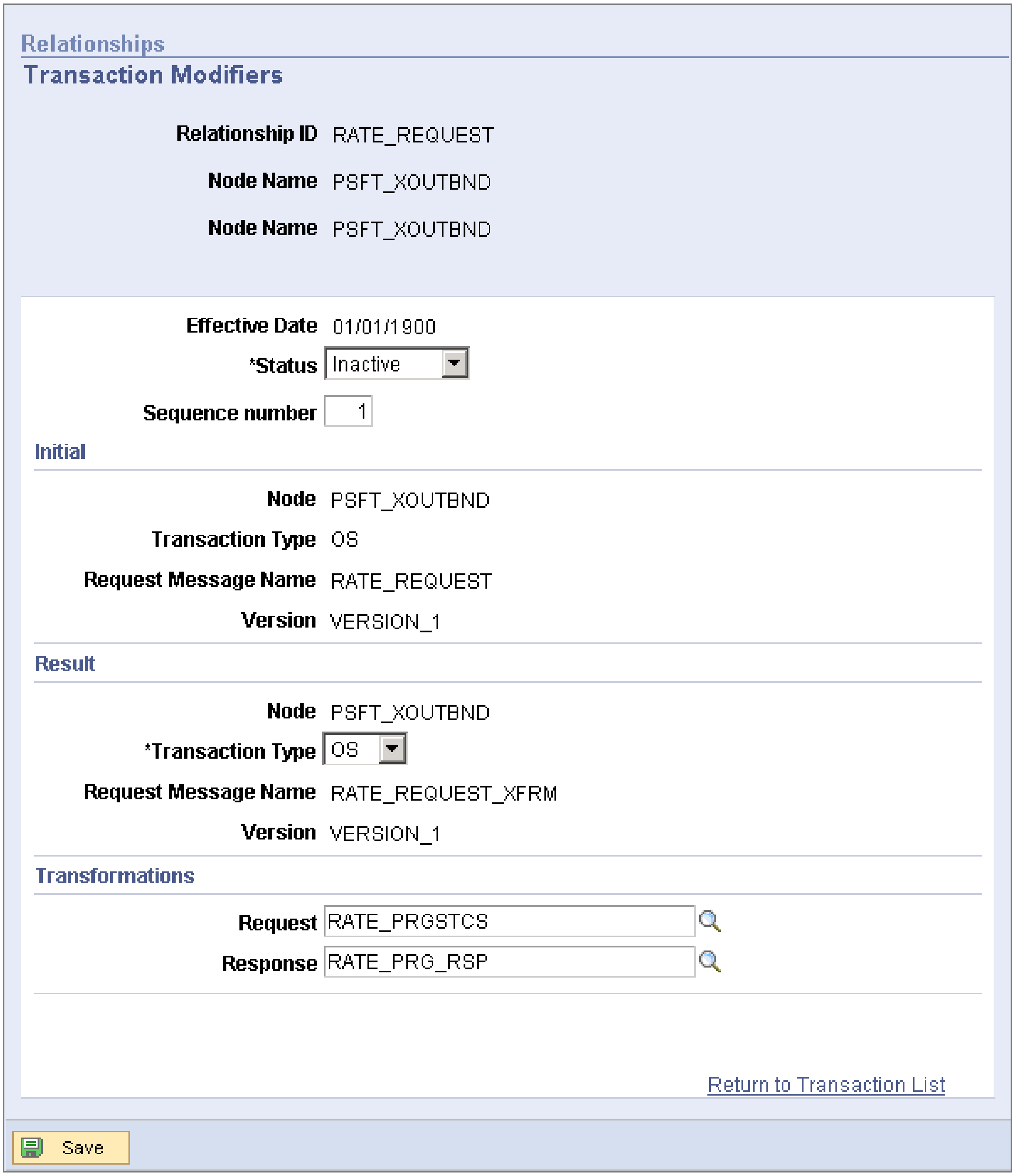
11. Go to the Transaction Modifiers tab and click Edit to view the Trans Modifier details.



Transaction Modifiers page

12. Change the Status field to Active.

13. Click Save.

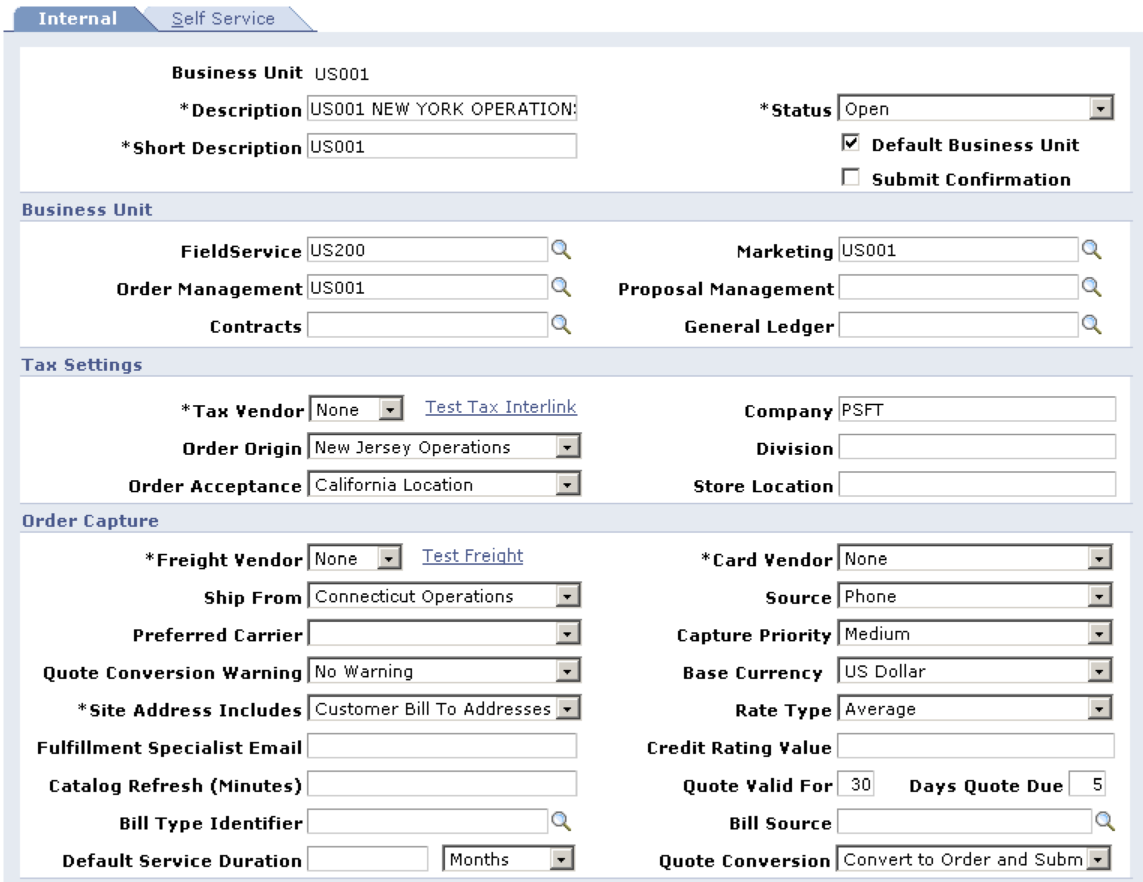


Transaction Modifiers Detail page

To Test PeopleSoft Freight Calculations:

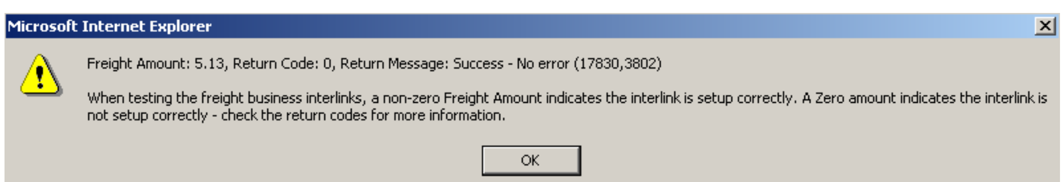
> **Note**. This test uses UPS Ground. If you have not configured UPS Ground in Progistics for your business unit, the test will not be able to calculate a freight amount.

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



Order Capture Definition page

2. Click the “Test Freight” link. You will receive a message box with the results of your test.



Freight Amount Success Message

3. If the Freight Amount returned is not zero, you are setup correctly. If a zero freight amount is returned, the reason for the calculation error will be displayed in the messagebox.

Task 10-2: Set Up Business Interlink Architecture for Tax Integration

This section provides an overview of the business interlink architecture for tax integration, an overview of tax product groups, as well as tax exemptions. It also explains how to:

- Select vendor plug-in locations.
- Select vendor DLLs and shared library locations.
- Install and test vendor databases.

Business Interlink Architecture for Tax Integration Overview

PeopleSoft Enterprise Order Capture delivers two business interlink objects to interact with Vertex and Taxware for both on-line and batch transactions: VERTEX_CALCTAX and TAXWARE_CALCTAX.

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

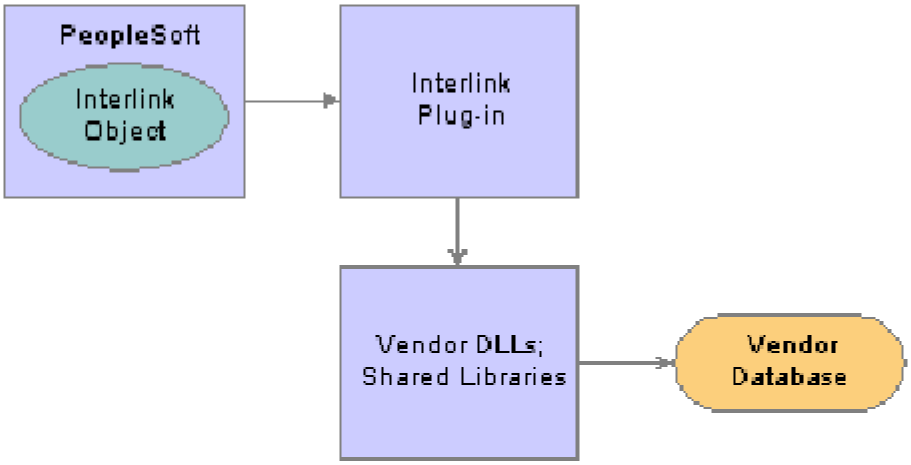
Using UNIX Environments

The interlink architecture converts the name from a DLL to a UNIX shared library/shared object when run in a UNIX environment. 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.

Interlink Architecture Flow

The diagram below illustrates the interlink architecture flow:



Interlink Architecture Flow

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

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

The setup instructions described in the following sections should be performed on each computer to be used as an application server.

Selecting Vendor Plug-in Locations

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

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

These directories contain the XML script files which describe the interlink plug-in structure. The directories are also used to create the delivered interlink objects in PeopleSoft Enterprise 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 or Taxware software, each vendor will provide 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.

Application Server Configurations

The application server configuration file has the following entry. You can use it 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=
```

Please Note: If you will be using the Bulk Order feature of Order Capture, your Process Scheduler will be calculating the taxes for child orders. You will need to perform the same plug-in configuration on your process scheduler as you do for the Application Server.

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:

Windows NT/2000

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

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

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

UNIX

Typically, 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 set up in the psconfig.sh UNIX shell script: <PS_HOME>/bin

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

Task 10-3: Install and Test Taxware and Vertex Databases

This following section provides an overview of installation and testing on a variety of platforms, and also explains how to:

- Install Taxware on a Windows NT platform.
- Install Taxware on a UNIX platform.
- Install Vertex on a Windows NT platform.
- Install Vertex on a UNIX platform.

Vertex and Taxware Overview

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

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

Installing Taxware

Taxware for Windows NT

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

Taxware 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 Taxware database files during Taxware software installation.

Installing Vertex

Vertex for Windows NT

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

Vertex for UNIX

Vertex provides a configuration file called PSVTXCFG that contains similar entries to the ones 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.

Note. For detailed information about business interlink technology, see *PeopleTools 8.45 PeopleBook: PeopleSoft Business Interlink Application Developer Guide.*

Task 10-4: Set Up Integration With Taxware WorldTax

PeopleSoft Enterprise Order Capture integrates with Taxware WorldTax to calculate value-added tax (VAT). This integration utilizes Peoplesoft's Business Interlink technology.

PeopleSoft Enterprise Order Capture makes a synchronous, XML-based call containing the order information (such as products, customers, pricing etc.) to WorldTax, which then calculates the appropriate VAT amount and returns it to CRM. These VAT amounts are displayed on the order.

Note. For detailed information about business interlink technology, see PeopleTools 8.45 PeopleBook: PeopleSoft Business Interlink Application Developer Guide.

To Integrate PeopleSoft Enterprise Order Capture with Taxware WorldTax:

1. Verify that Taxware's WorldTax, System 2.5, is installed and operating correctly.

   For information, see the UTL2-1-2.pdf on the WorldTax CD for installation instructions.

2. Verify that Sun Microsystems' Java environment is installed and running on your application server.

Note. For more information, see the *PeopleTools 8.45 PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide*, “Setting Up A Business Interlink Runtime Plug–In,” Setting up the Development Environment in Java.

Note. psjavaproxy.dll should be renamed psvat.dll after copying.

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

   See *PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide*, “Setting Up A Business Interlink Runtime Plug–In,” Setting up the Development Environment in Java.

4. Copy taxcommon.class from the Taxware WorldTax system to your <PS_HOME>\class directory.

Note. For information, see the UTL2-1-2.pdf on the WorldTax CD for installation instructions.

5. Extract psvat.class from the zip file attached to this resolution & copy it to <PS_HOME>\class directory.

   This is the java class file developed by PeopleSoft to integrate with Taxware WorldTax system.

6. Extract and copy psvat.xml to the following two directories:

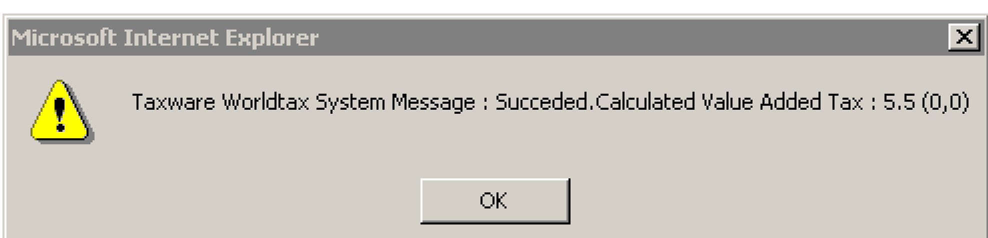
   - <PS_HOME>\bin\client\winx86\interfacedrivers

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

7. Follow the steps outlined in *PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide,* “Configuring PSINTERLINKS as a WebApp on WebSphere”

8. Test the business interlink as follows:

- From the PeopleSoft Enterprise CRM menu, select **Set Up CRM, Business Unit Related, Order Capture Definition**.
- Select “WorldTax” from the Tax Vendor drop down. Then push the “Test WorldTax Interlink” button. If the environment is set up correctly you will receive the following message:



WorldTax Environment Link Success Message

- If you do not select WorldTax from the Tax Vendor drop down and click the “Test Worldtax Interlink” button, you will receive the following message:

WorldTax System Error Message

CHAPTER 11

INSTALLING PEOPLESOFT ENTERPRISE PROCESS INTEGRATION PACKS 8.9

This chapter explains how to install and configure PeopleSoft Enterprise Process Integration Packs (PIP) components. You must install PeopleSoft Enterprise CRM 8.9 before you continue with the PeopleSoft Enterprise CRM Process Integration Packs installation.

Note. Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 89 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook.*

Note. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

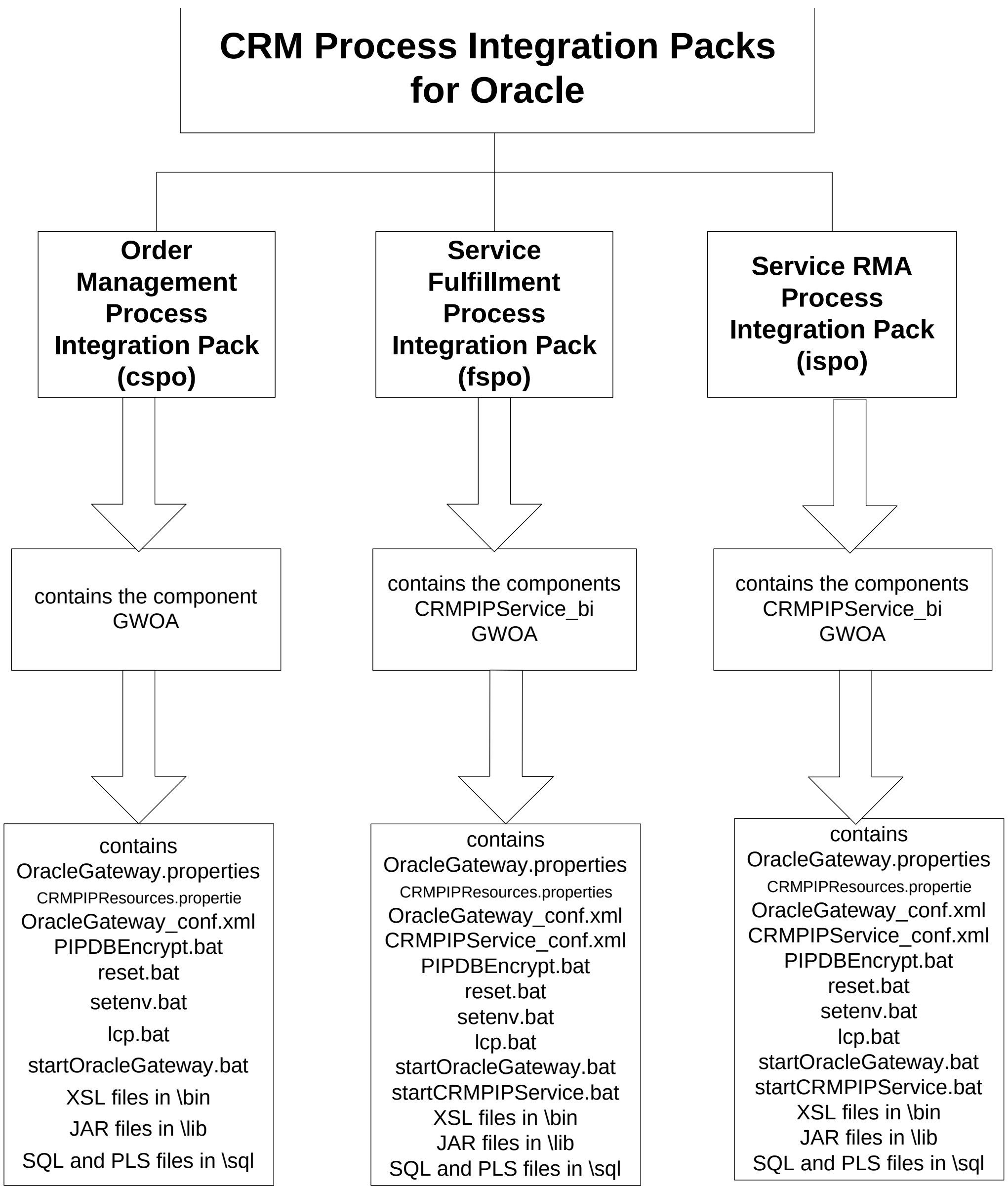
The following table summarizes PeopleSoft Enterprise Process Integration Packs installation tasks.

Task No.	Task Name
Task 11-1	Install PeopleSoft Enterprise Process Integration Packs
Task 11-2	Download Third Party Software
Task 11-3	Configure the SAPGateway Component
Task 11-4	Configure the OracleGateway Component
Task 11-5	Set Up the PeopleTools Environment
Task 11-6	Configure the PeopleSoft Synchronous Gateway Component

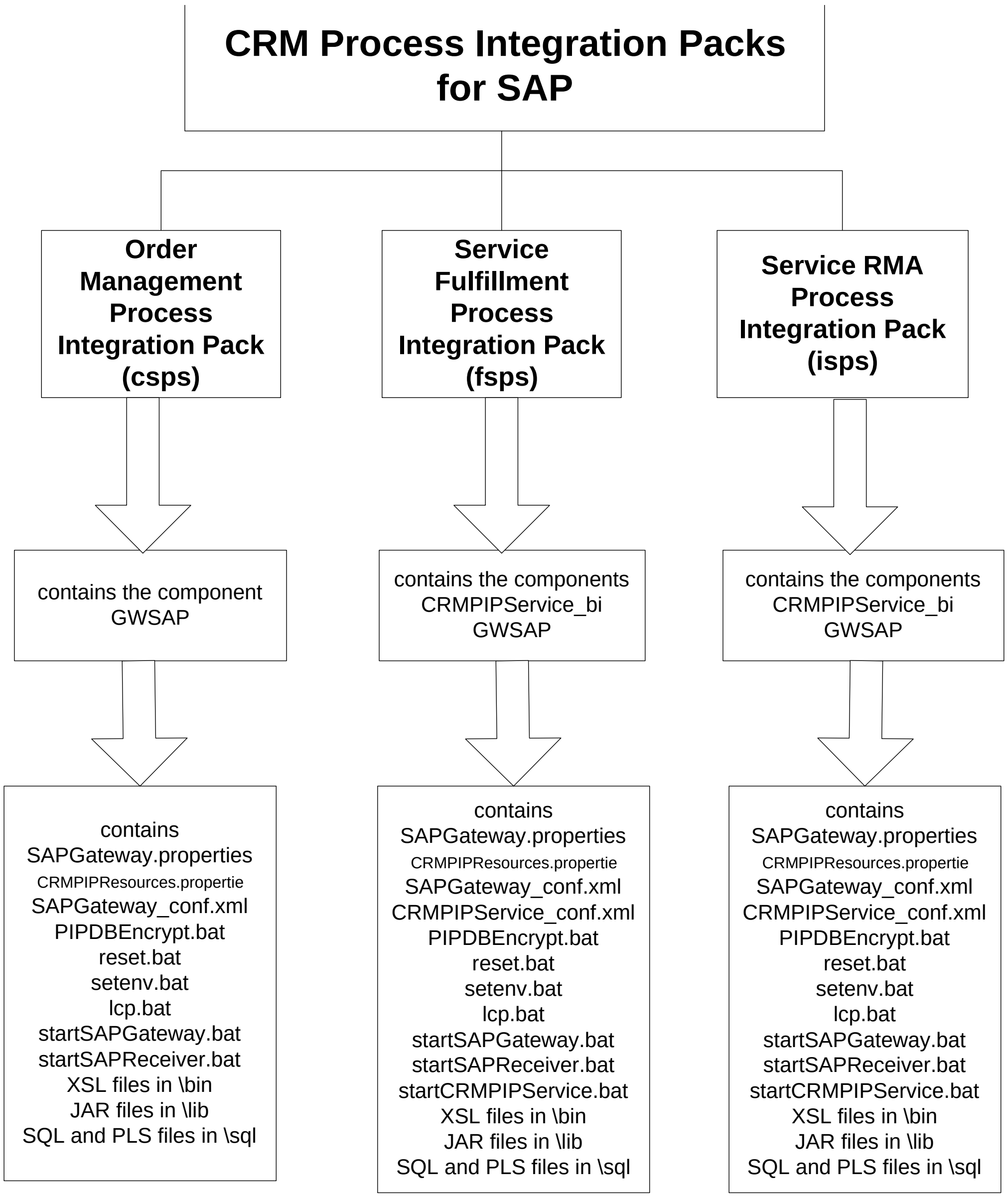
Task 11-7	Configure the PeopleSoft Enterprise Process Integration Packs Service Component
Task 11-8	Configure the 360-Degree View Settings
Task 11-9	Upload Master Data and Creating ID Cross-References

Before You Begin

The logical structure of PeopleSoft Enterprise Process Integration Packs for Oracle components and PeopleSoft Enterprise Process Integration Packs for SAP components are given in the following diagrams:



PeopleSoft Enterprise Process Integration Packs for Oracle Components



PeopleSoft Enterprise Process Integration Packs for SAP Components

Task 11-1: Install PeopleSoft Enterprise Process Integration Packs

The following procedure describes how to install PeopleSoft Enterprise Process Integration Packs.

To Install PeopleSoft Enterprise Process Integration Packs:

1. Copy the following directory or directories from the file server where your CRM application CD was installed to the server where you will be running your Integration Gateway. The number of directories you will copy depends on the Product Integration Products you have licensed. The sub-directories are listed below:

   - PeopleSoft Order Management Oracle = cspo
   - PeopleSoft Order Management SAP = csps
   - PeopleSoft Service Fulfillment Oracle = fspo
   - PeopleSoft Service Fulfillment SAP = fsps
   - PeopleSoft Service RMA Oracle = ispo
   - PeopleSoft Service RMA SAP = isps

Task 11-2: Download Third Party Software

The following table lists all the jar files required for PeopleSoft Enterprise Process Integration Packs.

Note. You can install the PeopleSoft Enterprise Process Integration Packs on any platform that supports JDK 1.4.

JAR file	Component	Download from /Copy From	Directory
mail.jar	Oracle Gateway SAP Gateway PeopleSoft Gateway	Copy from <PS_HOME>\class directory of PeopleSoft Application Server.	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
activation.jar	Oracle Gateway SAP Gateway PeopleSoft Gateway	Copy from <PS_HOME>\class directory of PeopleSoft Application Server.	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib

JAR file	Component	Download from /Copy From	Directory
			fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
classes12.jar (JDBC driver for Oracle database)	Oracle Gateway SAP Gateway PeopleSoft Gateway	1) Download from http://otn.oracle.com/software/tech/java/sqlj_jdbc/htdocs/jdbc9201.html?opt1_rb=NewUser OR 2) Copy from %ORACLE_HOME%/jdbc/lib directory.	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
xalan.jar	Oracle Gateway SAP Gateway PeopleSoft Gateway	Download from http://xml.apache.org/dist/xalan-j/old/	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
xercesImpl.jar	Oracle Gateway SAP Gateway PeopleSoft Gateway	Download from http://xml.apache.org/dist/xerces-j/old_xerces2/	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib

JAR file	Component	Download from /Copy From	Directory
			isps\crmpipservice_bi\lib
xml-apis.jar	Oracle Gateway SAP Gateway PeopleSoft Gateway	Download from http://xml.apache.org/dist/xalan-j/old/	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
log4j-1.2.8.jar	Oracle Gateway SAP Gateway PeopleSoft Gateway	Download from http://apache-origin.towardex.com/jakarta/log4j/	cspo\gwoa\lib csps\gwsap\lib fspo\gwoa\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\gwoa\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
JCO.jar	SAP Gateway	Download from https://websmp103.sap-ag.de/connectors	csps\gwsap\lib fsps\gwsap\lib isps\gwsap\lib
jRFC11.dll jRFC12.dll librfc32.dll	SAP Gateway	Download from from https://websmp103.sap-ag.de/connectors	csps\gwsap\bin fsps\gwsap\bin isps\gwsap\bin
msbase.jar (MSSQL Server)	SAP Gateway PeopleSoft Gateway	Download from http://www.microsoft.com/sql/downloads/jdbcregister.asp	csps\gwsap\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib

JAR file	Component	Download from /Copy From	Directory
mssqlserver.jar (MSSQL Server)	SAP Gateway PeopleSoft Gateway	Download from http://www.microsoft.com/sql/downloads/jdbcregister.asp	csps\gwsap\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib
msutil.jar (MSSQL Server)	SAP Gateway PeopleSoft Gateway	Download from http://www.microsoft.com/sql/downloads/jdbcregister.asp	csps\gwsap\lib fspo\crmpipservice_bi\lib fsps\gwsap\lib fsps\crmpipservice_bi\lib ispo\crmpipservice_bi\lib isps\gwsap\lib isps\crmpipservice_bi\lib

Downloading XML Parsers

Follow the steps below to download the XML Parsers.

To Download Xalan:

1. Download Xalan 2_6_0 from http://apache.towardex.com/xml/xalan-j/binaries/xalan-j_2_6_0-bin.zip.

2. Unzip xalan-j_2_6_0-bin.zip into a local folder. Look for the files under xalan-j_2_6_0\bin folder after unzipping the files.

3. Copy the following files into the <product>\lib folder where <product> is the product code you installed. The product codes are listed below:

   - PeopleSoft Order Management Oracle = cspo
   - PeopleSoft Order Management SAP = csps
   - PeopleSoft Service Fulfillment Oracle = fspo
   - PeopleSoft Service Fulfillment SAP = fsps
   - PeopleSoft Service RMA Oracle = ispo
   - PeopleSoft Service RMA SAP = isps

To Download Xerces:

1. Download Xerces-J-bin.2.6.2.zip Unzip the file into a local folder. Look for the jar fils under xerces-2_6-2 folder in unzipping the files.

2. Copy the XercesImpl.jar into the <product>/lib subfolder where <product> is the product code as listed below.

   - PeopleSoft Order Management Oracle = cspo
   - PeopleSoft Order Management SAP = csps
   - PeopleSoft Service Fulfillment Oracle = fspo
   - PeopleSoft Service Fulfillment SAP = fsps
   - PeopleSoft Service RMA Oracle = ispo
   - PeopleSoft Service RMA SAP = isps

Note. CRM PIP Services includes software developed by the Apache Software Foundation (http://www.apache.org/).

Note. We are using the jar file xercesImpl.jar from Xerces, not from Xalan.

Downloading JDBC Drivers

To Download Oracle JDBC drivers:

1. Download the Oracle JDBC Drivers from the following URL:

   http://otn.oracle.com/software/tech/java/sqlj_jdbc/htdocs/jdbc9201.html?opt1_rb=NewUser

2. Sign in and download the classes12.jar to the \lib sub folders of all components.

To Download MS SQL 2000 JDBC Drivers:

1. Download the Microsoft SQL 2000 JDBC Driver from the following link.

   http://www.microsoft.com/sql/downloads/jdbcregister.asp

2. Sign in and run the setup.exe (for Microsoft Windows-based systems) to install the JDBC Driver.

   The default install folder is C:\Program Files\Microsoft SQL Server 2000 Driver for JDBC.

3. Copy the jar files from C:\Program Files\Microsoft SQL Server 2000 Driver for JDBC\lib to the \lib sub folders of SAP Gateway component and PeopleSoft Gateway component. The \lib sub folder under gwsap and crmpipservice_bi folders.

- msbase.jar
- mssqlserver.jar
- msutil.jar

Downloading the JCo Connector and RFC dll

To Download the JCo Connector and Dll:

1. Download the JCo Connector and dll from the following link.

   https://websmp103.sap-ag.de/connectors

2. Sign in and navigate to **SAP Java Connector, Tools & Services**.

3. Download the SAP JCO Connector depending on the platform.

4. Copy the jar file JCO.jar to the sub folder \lib under SAPGateway component such as the folder gwsap\lib.

5. Copy jRFC11.dll, jRFC12.dll, librfc32.dll to \bin under SAPGateway component. The folders are <product>\gwsap\bin.

Downloading Log4j.jar

To Download Log4j-1.2.8.jar:

1. Open the following link:

   http://apache-origin.towardex.com/jakarta/log4j/

2. Log4j is available for download from a number of mirrors. Please use these mirrors as they improve download time and save bandwidth. Click on available for download

3. Scroll down to Log4j and click on 1.2.8 zip to download the jakarta-log4j-1.2.8.zip file.

4. Unzip and look for log4j-1.2.8.jar under jakarta-log4j-1.2.8\dist\lib in the unzipping files.

5. Copy log4j-1.2.8.jar to the \lib folder under all components.

Copying mail.jar and activation.jar

Follow the steps below to copy two additional files from your PeopleSoft File Server.

Copying mail.jar and activation.jar:

1. On a machine where you have installed a PeopleTools Application Server, copy the following files from <PS_HOME>\class

- activation.jar
- mail.jar

2. Copy these files into the \lib subfolders of all of your components.

Note. You can install the CRM Process Integration Packs on any platform that supports JDK 1.3.

Task 11-3: Configure the SAPGateway Component

This task describes how to configure the SAPGateway component.

Creating a SAP User for the Oracle Database

Create a user called "sapuser" on the Oracle 8i database configured. Execute the following script on the SAP application database:

```
create user sapuser identified by <password>;
grant resource, connect to sapuser;
```

This is done to store database objects required for the PeopleSoft Enterprise Process Integration Packs SAPGateway.

Creating a SAP User for the MS SQL Database

To Create a SAP User for the MS SQL Database:

1. Open the SQL Server Enterprise Manager.
2. Right-click SQL Server Group and add a new server group.
3. Select the SQL Server Group.
4. Right-click on Database and select New Database.
5. Enter the database name and click OK.
6. Select Security. Right-click Logins and select New Login.
7. Enter the login name.

8. Select SQL Server Authentication and enter the password for the login name.

9. Select the database for the login.

10. Select Database Access tab.

11. Select the database that can be accessed by the login.

12. Select db_owner as the permitted role for the database.

    By default Public is selected and it is allowed.

13. Click OK.

14. You are prompted to confirm the password. Enter the password and click OK.

Viewing the SAPGateway Component Files

You can find the SAPGateway component files in the location as given below.

To View the SAPGateway Component Files:

1. After you run the CRM Process Integration Packs install setup application, product folders are created on the Gateway machine.

2. The folders will depend on the product installed.

    - For Order Management PIP - SAP, the folder installed is csps.
    - For Service Fulfillment PIP - SAP, the folder installed is fsps.
    - For Service RMA PIP - SAP, the folder installed is isps.

For fsps and isps the two subfolders are gwsap and crmpipservice_bi. The one subfolder for csps is gwsap.

Note. There are no crmpipservice_bi folders under the product folder csps (Order Management PIP for SAP).

Populating the SAPGateway Tables

Follow the steps given below to populate the SAPGateway tables.

To Populate the SAPGateway Tables:

1. Using the DB user “sapuser”, create the gateway tables and populate the tables with seed data. Execute the script on the SAP application database:

<install dir>\<folder for product installed>\gwsap\sql\OASAPDBScript.sql
<install dir>\<folder for product installed>\gwsap\sql\MSSQLSAPDBScript.sql

where <install_dir > is the directory path specified for the PeopleSoft Enterprise Process Integration Packs installation.

Run OASAPDBScript.sql for SAP application on Oracle platform and MSSQLSAPDBScript.sql for SAP application on MS SQL Server platform.

Note. Run the OASAPDBScript.sql script and MSSQLSAPDBScript.sql script by using the corresponding database accessing tools provided by each platform.

Configuring the SAPGateway Properties File

Follow the steps given below to configure the SAPGateway properties file.

To Configure the SAPGateway Properties File:

1. Run the PIPDBEncrypt.bat file in the gwsap subfolder to generate the encrypted password for the SAP database that will be contained on the SAPGateway.properties file. Run this script from the command prompt in the directory where it has been installed. For example to encrypt the password CRMNET, type the following in the command prompt: PIPDBEncrypt.bat CRMNET.

2. Open the SAPGateway.properties file from the gwsap subfolder for the product installed and change the settings.

3. Set the SAP Gateway Database related properties for:

   - Driver
   - Prefix
   - URL
   - User name
   - Password (the encrypted password value generated)
   - Connection Type

   For example:

   db.driver=oracle.jdbc.driver.OracleDriver

   db.prefix=jdbc:oracle:thin:@

   db.url=dev4gw:1521:SAPGW

   where dev4gw is the host name of the system where SAPGateway database is installed, 1521 is the port number, and SAPGW is the SID.

db.username=CRMNET

db.password=74020763354452

db.connectiontype=thin

4. Set the SAP Server Properties for:

- Component
- Instance
- Client
- User name
- Password
- Language
- Server host
- System Number
- Service Number
- Program ID

For example:

```
#----------------------------------
#    SAP Server Properties
#----------------------------------
component.id=GWSAP
instance.id=GWSAP1
sap.logon.client=200
sap.logon.user=sierra
sap.logon.password=welcome
sap.logon.language=EN
sap.server.host=192.168.20.80
sap.system.number=01
sap.service.number=SAPGW01
sap.program.id=PROGID-PSCLNT200
```


5. Set the Email Settings for:

- Mail server name
- Mail To
- From E-mail IDs

For example:

mail.server=NT_SERVER1
mail.fromAddr=SAPGateway-CRMPIP@SierraAtlantic.com
mail.toAddr=CRMPIPAdmin@SierraAtlantic.com

Configuring the SAPGateway Connector File

Follow the steps given below to configure the SAPGateway connector file.

The SAPGateway connector file defines the different flow models as part of the gateway.

To Configure the SAPGateway Connector File:

1. Open the configuration file, SAPGateway_conf.xml from gwsap subfolder for the product installed.

2. Search the configuration file for ‘flowmodel name=”SAPOutboundFlowModel”’

3. Within this flow model search for ‘flow name=”HttpTargetFlow”’

4. Set the HTTP target flow host to the IP address or the host name of the PeopleSoft Integration Application server and the port to the HTTP port for the Integration Gateway server.

   For example:

   <host> 192.168.150.97 </host>
   <port> 80 </port>

   where 192.168.150.97 is the IP of the PeopleSoft Integration Gateway server and 80 is where the HTTP port where the Integration Broker. This gateway will connect via the HttpListeningConnector.

Important! The references of transformer tag for PIP products not installed should be commented from the Connector file.

Starting the SAPGateway

From the gwsap folder, run the batch files

- startSAPGateway
- startSAPReceiver

> **Note.** Check that the following jar files exist in the gwsap/lib subfolders for all the products installed - activation.jar, classes12.jar, log4j-1.2.8.jar, mail.jar, xalan.jar, xercesImpl.jar, xml-apis.jar, JCO.jar, msbase.jar, mssqlserver.jar, and msutil.jar.

Task 11-4: Configure the OracleGateway Component

This task describes how to configure the OracleGateway component.

Creating the Oracle Applications Database User

Create a database user called “anet” for the Oracle Applications database and grant DBA privileges to the user. Execute the following script on the Oracle application database for creating the user.

```
create user anet identified by <password>;
grant resource, dba to anet;
```

Viewing the OracleGateway Component Files

You can find the OracleGateway component files in the location as given below.

To View the OracleGateway Component Files:

1. After you run the CRM install setup application, product folders are created on the gateway machine.

2. The folders installed will depend on the product.

- For the Order Management PIP - Oracle, the folder installed is cspo.
- For the Service Fulfillment PIP - Oracle, the folder is fspo.
- For the Service RMA PIP - Oracle, the folder is ispo.

For fspo and ispo the two subfolders are gwoa and crmpipservice_bi. The subfolder for cspo is gwoa.

> **Note.** There are no crmpipservice_bi folders under the product folder cspo (Order Management PIP for Oracle).

Populating the Gateway Tables

To Populate the Gateway Tables:

1. Using the DB user “anet”; create the gateway tables, synonyms and populate the tables with seed data. Execute the script

<install_dir>\<folder for product installed>\gwoa\sql\orcl.sql

where <install_dir > is the directory path specified for the OracleGateway component.

Note. Run the orcl.sql script on the Oracle application database. The prompts below will be repeated three times as the script connects to the Oracle database three separate times.

2. Enter value for anet_user: anet

3. Enter value for anet_password: <password>

4. Enter value for anet_connectstr: <SID of Oracle application database>

Note. Packages, procedures and triggers are also created after executing the script.

Configuring the OracleGateway.properties File

To Configure the OracleGateway.properties File:

1. Run the PIPDBEncrypt.bat file in the gwoa subfolder to generate the encrypted password for the Oracle application database. This script is run from the command prompt in the directory where it was installed. For example to encrypt the password APPS, type the following in the command prompt: PIPDBEncrypt.bat APPS.

2. Open the OracleGateway.properties file from the gwoa subfolder of the product installed and change the settings.

3. Set the Oracle Gateway Database related properties for:

   - Driver
   - Prefix
   - URL
   - User name
   - Password (the encrypted password value generated)
   - Connection Type
   - Component ID
   - Instance ID

   #----------------------------------

```
# Oracle Gateway Database connection properties

#----------------------------------

#db.driver=oracle.jdbc.driver.OracleDriver

#db.prefix=jdbc:oracle:thin:@

#db.url=<ip/host name>:<port#>:<SID>

#db.username = <user name>

#db.password = <password>

#db.connectiontype = thin


db.driver=oracle.jdbc.driver.OracleDriver

db.prefix=jdbc:oracle:thin:@

db.url=192.168.150.206:2623:CRM4
```

where 192.168.150.206 is the IP address of the system where the Oracle database is installed, 2623 is the database port and CRM4 is the SID

```
db.username = APPS

db.password = 1095782483

db.connectiontype = thin

# To be used for identifying component id

component.id = GWOA

# To be used for identifying the individual gateway instances

instance.id = GWOA1
```

4. Set the Email Settings for

- Mail server name
- Mail To
- From E-mail IDs

For example:

mail.server=NT_SERVER1
mail.fromAddr=SAPGateway-CRMPIP@SierraAtlantic.com
mail.toAddr=CRMPIPAdmin@SierraAtlantic.com

Configuring the OracleGateway Connector File

To Configure the OracleGateway Connector File:

1. Open the configuration file, OracleGateway_conf.xml from gwsap subfolder for the product installed.
2. Search the configuration file for ‘flowmodel name=”OracleOutboundFlowModel”’
3. Within this flow model search for ‘flow name=”HttpTargetFlow”’
4. Set the HTTP target flow host to the IP address or the host name of the PeopleSoft Integration Application server and the port to the HTTP port for the Integration Gateway server.

   For example:

   <host> 192.168.150.97 </host>
   <port> 80 </port>

   where 192.168.150.97 is the IP of the PeopleSoft Integration Gateway server and 80 is the HTTP port for the Integration Broker. This gateway will connect via the HttpListeningConnector.

Important! The references of transformer tag for PIP products not installed should be commented from the Connector file.

Starting the OracleGateway

To start the OracleGateway, from the gwoa folder, run the batch file startOracleGateway.

Note. Check that the following jar files exist in the gwoa/lib subfolders for all the products installed - activation.jar, classes12.jar, log4j-1.2.8.jar, mail.jar, xalan.jar, xercesImpl.jar, and xml-apis.jar. These files are files that you have copied in Task 11-2.

Task 11-5: Set Up the PeopleTools Environment

This task describes steps for setting up the PeopleTools environment before you install the CRM Process Integration Packs.

To Set Up your PeopleTools Environment:

1. Install the PeopleSoft Application server if you do not already have one running. If you do have your Application server running, you need to stop the Application server.

2. Configure the Application server domain using the PSADMIN utility located in the <PS_HOME>\appserv directory on the Application server.

3. When configuring or creating the Application server domain you need to make sure that the Pub/Sub Servers = Yes for the domain.

4. Set the Jolt Connect string values for the Application server in the Integration Gateway properties file. The properties file path is:

   <drive>\bea\weblogic81\config\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\integrationGateway.properties

   - Encrypt the password using the PSCipher.bat or PSCipher.sh in the path:

   <PS_HOME>\webserv\<PIA_Domain>

   - Set the values for:
     - ig.isc.serverURL (//<Application server name>:<JSL Port#>)
     - ig.isc.userid (user name)
     - ig.isc.password (encrypted password)
     - ig.isc.toolsRel (PeopleTools release number)
   - Start the Application server Domain.
   - Start PeopleSoft InternetArchitecture (PIA). Run the file:

   <PS_HOME>\webserv\<PIA_Domain>\startPIA.cmd

5. Configure the Publication and Subscription Messaging servers.

Task 11-6: Configure the PeopleSoft Synchronous Gateway Component

This task describes how to install and configure the PeopleSoft Synchronous Gateway Component.

Configuring the Properties File

To Configure the CRMPIPServices.properties File:

1. The crmpipservice_bi folder is located under <install dir>\<folder for product installed> as given below:

   - Service Fulfillment PIP – SAP: fsps
   - Service Fulfillment PIP- Oracle: fspo
   - Service RMA PIP – SAP: isps
   - Service RMA PIP – Oracle: ispo

   The subfolders of crmpipservice_bi are:

   - bin – which contain the .XSL files
   - lib – which contains the executable JAR files

Note. For the Order Management PIP the crmpipservice_bi subfolder does not exist under the csps or cspo folder.

2. Navigate to the path <Install dir>\<product>

3. Run the PIPDBEncrypt.bat file from the command prompt in the crmpipservice_bi subfolder to generate the encrypted database password for the PeopleSoft application database password. For example to encrypt the password sa, type the following in the command prompt: PIPDBEncrypt.bat sa.

4. Set the PeopleSoft Database related properties based on your PeopleSoft database platform or

5. Driver

- Prefix
- URL
- User Name
- Password (the encrypted password value generated)
- Connection Type
- Component ID
- Instance ID

Example for Oracle Database

#db.driver=oracle.jdbc.driver.OracleDriver

#db.prefix=jdbc:oracle:thin:@

#db.url=<ip/host name>:<port#>:<SID>

```
#db.username = <user name>

#db.password = <password>

#db.connectiontype = thin


# Example for MicroSoft SQL Server Database

#db.driver=com.microsoft.jdbc.sqlserver.SQLServerDriver

#db.prefix=jdbc:microsoft:sqlserver://

#db.url=<ip/host name>:<port#>;DatabaseName=<database name>

#db.username = <user name>

#db.password = <password>

#db.connectiontype = thin.

# To be used for identifying component id

component.id = GWPSFT


# To be used for identifying the individual gateway instances

instance.id = GWPSFT1
```

6. Enter the Mail server name, Mail To and From Email IDs.

   For example:

```
#-----------------------------------

#   EMail Settings

#-----------------------------------

mail.server=NT_SERVER1
mail.fromAddr=PeopleSoftGateway-xxx@yourcompany.com
mail.toAddr=xxxx@yourcompany.com
```


Configuring the Connector File

To Configure the Connector File:

1. Open the CRM Process Integration Packs Service Connector file, CRMPIPService_conf.xml from the CRMPIPService_bi subfolder.

2. Go to the location where route touch point is “ITM01” and “ITM03.” For example, search ‘<route touchpoint=”ITM01”’

3. For Synchronous call, set the target id to the IP of the system where the target connector is running.

   For example:

   If the target is Oracle –

   <target id=”GWOA1”> http://192.168.100.174:8060/anet/GWOASyncListener

   where GWOA1 is the gateway instance id and the IP of the system where the target connector is running is specified.

   If the target is SAP –

   <target id=”GWSAP1”> http://192.168.150.106:8092/anet/GWSAPSyncListener

   where GWSAP1 is the gateway instance id and the IP of the system where the target connector is running is specified.

Important! The references of transformer tag for PIP products not installed should be commented from the Connector file.

Starting the PeopleSoft Gateway

To start the CRM PIP Service, run the batch file startCRMPIPService.bat.

Note. Check that the following jar files exist in the crmpipservice_bi/lib subfolders for all the products installed - activation.jar, classes12.jar, log4j-1.2.8.jar, mail.jar, xalan.jar, xercesImpl.jar, xml-apis.jar msbase.jar, mssqlserver.jar, and msutil.jar. These files are files that you have copied in Task 11-2.

Task 11-7: Configure the PeopleSoft Enterprise Process Integration Packs Service Component

This task describes how to install and configure the PeopleSoft Enterprise CRM Process Integration Packs Service Component.

Copying the CRMPIP Service Component Files

Before you can begin configuring the PeopleSoft Enterprise CRM Process Integration Packs Service Component, you need to copy the component files as explained here.

To Copy the CRMPIP Service Component Files:

This step is for business interlinks.

There are four products that need these properties files on the appserver. The products are listed below. If you are not installing these products, you do not need to perform this step.

Copy CRMPIPService.properties and CRMPIPResource.properties from the file server where the CRM application CD was installed to <PS Home>\appserver\<domain> on your PeopleSoft appserver. The files are located under <CRM install>\<product>\crmpipservice.

- PeopleSoft Service Fulfillment Oracle = fspo
- PeopleSoft Service Fulfillment SAP = fsps
- PeopleSoft Service RMA Oracle = ispo
- PeopleSoft Service RMA SAP = isps

Configuring the SQR Report Nodes

Follow the steps given below to configure the SQR Report node.

To Copy the SQR Files:

1. There are four SQR files needed to install. They are:
   - custidcr.sqr
   - itemidcr.sqr
   - upload.sqr
   - upload1.sqr
2. On your PeopleSoft Batch server machine, insert the CRM Process Integration Packs CD-ROM into the CD-ROM drive and run the setup application from the root directory of the CD described in Task 1-1 of this guide. Follow Task 1-1 steps with the PeopleSoft Batch Server checked instead of PeopleSoft Application Server option. These four SQR files will be installed to <PS_HOME>\sqr on your Batch server machine.

To Configure the SQR Report Nodes:

Note. The CRM Process Integration Packs only support Windows NT Process Scheduler for a SQR report node.

1. Login to PeopleSoft CRM and select **PeopleTools, Process Scheduler, Report Nodes**.

2. Search for the report node "dnode" This node is necessary to run your Integration Product. If the report node "dnode" does not exist please add the node"dnode".

3. Verify that FTP/Xcopy is selected.

4. Enter the URL of the web server – for example:

   http://<machine name>:<port number>/psreports/<site name>

   where <machine name> is the name of the web server. If you are using an HTTP port other than 80, you need to specify the port number. <site number> refers to the directory where you installed the PIA files.

Note. If you installed the web server software with the default TCP port of 80, you need not specify the port number in the URL path. However, if you installed the web server to some other port, you must specify the port number in the URL path.

5. Enter Network Path with \\<machine name>\psreports.

   where <machine name> is the name of your machine.

   Make sure that this directory is shared with the login or logins used to start Process Scheduler. Enter the UNC path that points to your Report Repository share.

6. Select NT as the operating system.

7. Check the Ftp/Xcopy radio button. If Http is not supported, it must be FTP/Xcopy. This the network path that is your FTP server.

8. Click Save.

Note. The CRM Process Integration Packs only support Windows NT Process Scheduler for a SQR report node.

Note. For more information, see *PeopleSoft Process Schedule PeopleBook, “Setting Server Definitions,”* “Defining Report Nodes”.

Activating the Message Nodes

The message nodes are delivered inside your databases with the status as inactive. After running the DMS script, the status of message channels and messages will be set to be active. Follow the steps given below.

To Copy the Data Mover files:

1. On your PeopleSoft Database server machine or PeopleSoft File server machine, insert the CRM Process Integration Packs CD-ROM into the CD-ROM drive and run the setup application from the root directory of the CD described in Task 1-1in this chapter. Follow Task 1-1 steps with the PeopleSoft Database Server

option or PeopleSoft File Server option checked instead of PeopleSoft Application Server option. These DMS files will be installed to <PS_HOME>\scripts on your PeopleSoft Database server machine or PeopleSoft File server machine.

To Activate Message Channels and Messages:

1. Open <product>_active.dms from <PS_HOME>\scripts directory using PeopleSoft Data Mover utility either on PeopleSoft Database server or PeopleSoft File server based on the installation location above.

- Order Management PIP - SAP, the <product> is csps.
- Order Management PIP - Oracle, the <product> is cspo.
- Service Fulfillment PIP - SAP, the <product> is fsps.
- Service Fulfillment PIP - Oracle, the <product> is fspo.
- Service RMA PIP- SAP, the <product> is isps.
- Service RMA PIP - Oracle, the <product> is ispo.

2. Run the DMS scripts.

Note. Please make sure the Pub/Sub Servers has been configured/turned on in the Application server.

Setting Up the Local Gateway

To Set Up the Local Gateway:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Integration Broker, Gateways**.
2. Search for Local Gateway.
3. Check the Local Gateway check box.
4. Specify the Gateway URL as:

   http://<web server name>:<port>/PSIGW/PeopleSoftListeningConnector

For example:

   http://test4ps:7001/PSIGW/PeopleSoftListeningConnector

5. Click Save.
6. Click Refresh to refresh the properties and click Load to load the connectors.
7. Check the Local Gateway check box.
8. Save the record.

> **Note**. For more information, see the *PeopleSoft Integration Broker PeopleBook, "Managing the Integration Gateway," "Defining a Gateway"*.

Setting Up the Remote Nodes

To Set up the Remote Nodes:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Integration Broker, Node Definitions**.
2. Search and select the node PSFT_PIP_SAP or PSFT_PIP_ORA.
3. Select the Connector tab.
4. Update the connecter IP or Host name, and Port number.
5. For the remote nodes using HTTP Target Connector, set the PRIMARYURL property to the URL of the corresponding application gateway. For example:

   For OracleGateway: http://<ip or host name>:<port>/anet/GWOAListener

   The default port number for OracleGateway is 8090. It can also be configured in OracleGateway_Conf.xml, which is installed on the Gateway machine.

   For SAPGateway: http://<ip or host name>:<port>/anet/GWSAPListener

   The default port number for SAPGateway is 8093. It can also be configured in SAPGateway_Conf.xml, which is installed on the Gateway machine.

> **Note**. For more information, see *PeopleSoft Integration Broker PeopleBook, "Administering Basic Integrations," "Configuring Nodes"*

Setting Up Transactions

To Set Up Transactions on Remote Nodes:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Integration Broker, Node Definitions**.
2. Search and select the node PSFT_PIP_SAP or PSFT_PIP_ORA.
3. Select the Transactions tab.
4. Click Edit link for the OutSync message OAGMSG.

5. Select the Connectors tab.

6. Update the connecter IP, Host name, and Port number.

7. For the OutSync transaction OAGMSG on PSFT_PIP_ORA node, the connector properties should be:

   - Gateway ID: LOCAL
   - Connector: HTTPTARGET
   - Go to the Connectors Tab and specify

   http://<ip or hostname>:<port>/anet/GWOASyncListener in the PRIMARYURL

   where <ip/hostname> is IP of system where OracleGateway is running and the default port number is 8060. It can also be configured in the OracleGateway_Conf.xml, which will be installed on the Gateway machine.

8. For the OutSync transaction OAGMSG on PSFT_PIP_SAP node, the connector properties should be:

   - Gateway ID: LOCAL
   - Connector: HTTPTARGET
   - Go To Connectors Tab and specify

   http://<ip/hostname>:<port>/anet/GWOASyncListener in the PRIMARYURL

   where ip/hostname is IP of system where SAPGateway is running and the default port number is 8092. It can also be configured in the SAPGateway_conf.xml, which will be installed on the Gateway machine.

Note. For the OutSync message SCM_GET_ORD_STATUS, you will not override the connector properties.

Setting the MerchantURL Parameter

Follow the steps given below to set the MerchantURL parameter for messages using Business Interlinks (BI).

To Set the MerchantURL Parameter:

1. Open the Application Designer and select the messages using Business Interlinks, RF_IN_ITEM_BALANCES and RF_GETPOIUT.

2. Select the Settings tab.

3. Set the MerchantURL parameter to the URL of the PeopleSoft gateway for synchronous messages.

4. Save the BI.

   For example:

http://<ip/hostname>:<port>/anet/GWPSSyncHandler

where <ip/hostname> is the IP of the PeopleSoft Synchronous Gateway and the default port number is 8180. This can also be configured in CRMPIPService_conf.xml, which is located under <install dir>\<folder for product installed>\crmpipservice_bi, where <folder for product installed> could be

- Service Fulfillment PIP - Oracle: fspo.
- Service Fulfillment PIP - SAP: fsps.
- Service RMA PIP - Oracle: ispo.
- Service RMA PIP - SAP: isps.

Note. There are no crmpipservice_bi folders under the product folder cspo (Order Management PIP for Oracle) and csps (Order Management PIP for SAP).

Task 11-8: Configure the 360-Degree View Settings

This task describes how to configure the 360-Degree View settings.

Configuring the View Invoice settings for Oracle Applications

Follow the steps given below to configure the View Invoice settings for Oracle Applications.

To Update the Remote Node to View Oracle Invoice Details:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Integration Broker, Node Definitions**.
2. Search and select the node ORACLEINVOICE.
3. Select the Portal tab.
4. Set the Content URI Text and Portal URI Text field values as the Oracle Applications portal URL and save.

   For example:

   http://192.168.20.80:8102/dev60cgi/f60cgi

   where 192.168.20.80 is the Oracle applications base URL and 8102 is the port number.

To Configure the View Invoice settings:

1. Sign in to PeopleSoft CRM and select **Setup CRM, Common Definitions, 360-Degree View, Define Node.**

2. Retrieve the node SCMBILLS.
3. In the Node Action box, select Application class as the Node action and set the following:
    - Class ID as Invoice.
    - Class path as CUSTOMER360.
    - Method name as ShowORCLInvoice.
4. In the Node Type box, click the EIP – (Synchronous) radio button, set the following:
    - Class ID as EIP.
    - Class path as RB_TD_360.
    - Method name as PopulateBillRequestMsg.
5. Select the Request message as BI_EIP360_REQ
6. Set the Response messages as BI_EIP360_RSP.
7. Set the Key Field 1 value to SOLD_TO_CUST_ID.
8. Set the Key Field 2 value to INVOICE.
9. Select the Fields to Display field names as
    - SOLD_TO_CUST_ID to be displayed first with display length 20.
    - INVOICE to be displayed second with display length 30.

      In addition, the Order sequence is Ascending, select the Display check box for both key fields, and select Order by for Invoice to sort invoices based on invoice number.
10. Click Save.

To Define Content Ref Values:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Portal, Structure and Content**.
2. Click the "Add Content Reference" link to add ORCLINVOICE
3. Enter the name and label as ORCLINVOICE.
4. Set the Object Owner ID as 360 Degree View.
5. For the URL Information grid, set the following:
    - Node name as ORACLEINVOICE

- URL type as Non-PeopleSoft URL
- Portal URL, containing the transaction code and login details for the Oracle applications portal

For example:

?form=FNDSCSGN&userid=applsyspub/pub@CRM4.AR_ARXTWMAI_INVOICES_ENTER

where AR_ARXTWMAI_INVOICES_ENTER is the screen function name, CRM4 is the service name, applsyspub is the Oracle Application server database user name and pub is the password.

6. Check the Hide from Portal Navigation check box.
7. Click Save.

Configuring the View Payments Settings for SAP

To Update the Remote Node to View Payment Details:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Integration Broker, Node Definitions**.
2. Search and select the node SAPPAYMENTS.
3. Select the Portal tab.
4. Set the Content URI Text and Portal URI Text field value as the SAP portal URL and save.

   For example:

   http://192.168.20.80/scripts/wgate/webgui/

   where 192.168.20.80 is the IP of the system where the SAP server is running.

To Configure View Payment Settings for SAP:

1. Sign in to PeopleSoft CRM and select **Setup CRM, Common Definitions, 360-Degree View, Define Node**.
2. Retrieve the node PAYMENTS.
3. In the Node Action box, select Application class as the Node action and set the following:
   - Class ID as Payments.
   - Class path as CUSTOMER360.
   - Method name as ShowSAPPayment.

4. In the Node Type box, click the EIP – (Synchronous) radio button, set the following:

    - Class ID as EIP.
    - Class path as RB_TD_360.
    - Method name as PopulatePaymentRequestMsg.

5. Select the Request message as AR_CRM_REQUEST.

6. Set the Response messages as AR_CRM_RESPONSE.

7. Set the Key Field 1 value to CUST_ID.

8. Set the Key Field 2 value to PAYMENT_ID.

9. Select the Fields to Display field names as

    - CUST_ID to be displayed first with display length 15.
    - PAYMENT_ID to be displayed second with display length 20.

    In addition, the Order sequence is Ascending, select the Display check box for both key fields, and select Order by for Payment_ID to sort based on payment ids.

10. Click Save.

To Define the Content Ref Values:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Portal, Structure and Content**.

2. Add Content Reference for SAPPAYMENTS.

3. Enter the name and label as SAPPAYMENTS.

4. Set the Object Owner ID as 360 Degree View.

5. For the URL Information grid, set the following:

    - Node name as SAPPAYMENTS.
    - URL type as Non-PeopleSoft URL.
    - Portal URL containing the transaction code and login details to SAP portal.

    For example:

    !?~transaction=FBL5&~okcode=SUCH&~language=en&~client=200&~login=peoplesoft&~password=we lcome

    where FBL5 is the transaction code for the Customer Line Display screen., 200 is the SAP client instance number, peoplesoft is the login id and welcome is the password for the SAP client.

6. Check the Hide from Portal Navigation check box.

7. Click Save.

Configuring the View Payments settings for Oracle Applications

To Update the Remote Node to View Oracle Payment Details:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Integration Broker, Node Definitions**.

2. Search and select the node ORACLEPAYMENTS.

3. Select the Portal tab.

4. Set the Content URI Text and Portal URI Text field values as the Oracle Applications portal URL and save.

   For example:

   http://linnet.sierraopt.com:8102/dev60cgi/f60cgi

   where linnet.sierraopt.com is the Oracle applications base URL and 8102 is the port number.

To Configure the View Payment Settings for Oracle Applications:

1. Sign in to PeopleSoft CRM and select **Setup CRM, Common Definitions, 360-DegreeView, Define Node**.

2. Retrieve the node PAYMENTS.

3. In the Node Action box,select Application class as the Node Action and set the following:

   - Class ID as Payments.
   - Class path as CUSTOMER360.
   - Method name as ShowORCLPayment.

4. In the Node Type box, click the EIP – (Synchronous) radio button, set the following:

   - Class ID as EIP.
   - Class path as RB_TD_360.
   - Method name as PopulatePaymentRequestMsg.

5. Select the Request message as AR_CRM_REQUEST.

6. Set the Response messages as AR_CRM_RESPONSE.

7. Set the Key Field 1 value to CUST_ID.

8. Set the Key Field 2 value to PAYMENT_ID.

9. Select the Fields to Display field names as

   - CUST_ID to be displayed first with display length 15.
   - PAYMENT_ID to be displayed second with display length 20.

   In addition, the Order sequence is Ascending, select the Display check box for both key fields, and select Order by for Payment_ID to sort based on payment ids.

10. Click Save.

To Define Content Reference Values:

1. Sign in to PeopleSoft CRM and select **PeopleTools, Portal, Structure and Content**.

2. Add Content Reference for ORCLPAYMENTS.

3. Enter the name and label as ORCLPAYMENTS.

4. Set the Object Owner ID as 360 Degree View.

5. For the URL Information grid, set the

   - Node name as ORACLEPAYMENTS.
   - URL type as Non-PeopleSoft URL.
   - Portal URL, containing the transaction code and login details to Oracle Applications portal.

     For example:

     ?form=FNDSCSGN&userid=applsyspub/pub@CRM4.AR_ARXRWMAI_SUMMARY

     where AR_ARXTWMAI_SUMMARY is the screen function name, CRM4 is the service ID, applsyspub is the Oracle Application server database user name and pub is the password.

6. Check the Hide from Portal Navigation check box.

7. Click Save.

Task 11-9: Upload Master Data and Creating ID Cross-References

This task describes how to upload the master data during first time synchronization and create ID cross-references.

Uploading the Master Data

To Upload Master Data:

1. Sign in to PeopleSoft CRM and select **Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Configure Initial ID Cross-Reference, Upload Customer Data.**

2. Add a new Run Control ID. Select the Application, Instance and File name.

   For example, the application can be PEOPLESOFT, ORACLE or SAP and the instances can be GWPSFT1, GWOA1 or GWSAP1, respectively. The correct combinations for application and instance are PEOPLESOFT/GWPSFT1, ORACLE/GWOA1 and SAP/GWSAP1.

   The file name is the file that you created from your Oracle or SAP

3. Click Run. From the process list, select the row and click OK.

   The master data is uploaded in a flat file format to the directory path specified.

   For example,

   <Drive>\<PeopleTools Folder>\SQR\oacust_new.dat

   where PeopleTools folder is the directory on the PS server where PeopleTools is installed.

The flat file format is different for Oracle and SAP. Given below are examples for customer data for Oracle and SAP. The common fields are SetID, Cust_ID, Name, and Address. The two additional fields for Oracle are Party_ID and Address_ID.

```
V1   2343    3001    1000      ACCENT        6544 San Tomas Blvd    San Jose       CA   98744    USA
V1   2342    3002    300003    FUJITSU2      7890                   Redwood falls  MN   12345    USA
V1   87897   3007    78        Digital labs  2345                   South Bend     IN   90210    USA
```

```
ACUS    CST4         Sugar N Spice Foods    1200 Lake Drive    Circle Pines    MN  55014    USA
ACUS    BIZZTALK     BIZZTALK Corp          1200 Lake Drive    Circle Pines    MN  55014    USA
```

Given below are examples for item data for Oracle and SAP. The common fields are SetID, Item_ID, and Description. The additional field for Oracle is OASegment, which is the item name.

```
V1      1234                   item            item
V1      5123                   CP198           VideoPhone
V1      AC                     AC              AirCondition
V1      AC1000                 AC1000          Air Conditioner 1.5
V1      DRAGONFLY              DRAGONFLY       DRAGONFLY
```

```
ACUS    AIRFARE1          AIRFARE Desc
ACUS    GEARBOX20355      Gear Box 3456RFARE Desc
ACUS    CONCARD           Concard France
ACUS    AIRCOOLER         AIRCooler
ACUS    FAN200            Fan
```

Note. Follow the same steps to upload the item master data.

Creating ID Cross-References

To Create ID Cross-references:

1. Sign in to PeopleSoft CRM and select **Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Initial ID Cross-Reference, Customer Master (Online).**

2. Select the instance and organization for the source and target applications.

   For example, the instances can be GWPSFT1, GWOA1 or GWSAP1 and organizations can be V1 in Oracle and ACUS in SAP.

3. Click Refresh.

   The existing data is displayed in different rows for the source and target.

4. Select the row in the source to be mapped to the row in target. Click Map.

Note. Follow the same steps to create the ID cross-references for items.

C H A P T E R 12

INSTALLING PEOPLESOFT ENTERPRISE INFOSYNC 9

This document explains how to install and configure Oracle's PeopleSoft Enterprise Infosync 9.

You must install Oracle's PeopleSoft Enterprise PeopleTools and Oracle's PeopleSoft Enterprise CRM applications before you continue with the PeopleSoft Enterprise Infosync 9 installation. PeopleSoft Enterprise Infosync 9 supports PeopleSoft Enterprise CRM 8.4 SP1, 8.8 SP1, and 8.9 application databases.

Task Overview

The following table summarizes the PeopleSoft Enterprise CRM Infosync installation tasks.

Task No.	Task Name
Task 12-1	Install the PeopleSoft Update Required for Install
Task 12-2	Install the PeopleSoft Enterprise Infosync Server and Client 9 CD
Task 12-3	Supported Platforms for the PeopleSoft Enterprise Infosync Server
Task 12-4	Prepare the PeopleSoft Enterprise Infosync Server for Domino
Task 12-5	Prepare the PeopleSoft Enterprise Infosync Server for Exchange
Task 12-6	Set Up the PeopleSoft Integration Broker
Task 12-7	Install the PeopleSoft Enterprise Infosync Server
Task 12-8	Set Up PeopleSoft Enterprise CRM Access
Task 12-9	Export Users from PeopleSoft Enterprise CRM to the PeopleSoft Enterprise Infosync Server
Task 12-10	Import Users into the PeopleSoft Enterprise Infosync Server
Task 12-11	Prepare for the PeopleSoft Enterprise Infosync Client Installation

Task 12-12	Install the PeopleSoft Enterprise Infosync Client
Task 12-13	Run the PeopleSoft Enterprise Infosync Client

Task 12-1: Install the PeopleSoft Update Required for Install

To Apply the PeopleSoft Update Required for Install:

1. Go to Customer Connection to download the PeopleSoft Update Required for Install.

2. Implement the corresponding PeopleSoft Update ID to the CRM Application Database version you have installed. Please review all of the pre-requisites and make sure that the pre-requisites are fulfilled as well.

Peoplesoft CRM Application Database	PeopleSoft Update Required for Install
CRM 8.9 Database	Update ID 649341
CRM 8.8 SP1 Database	Update ID 649460
CRM 8.4 SP1 Database	Update ID 649461

Task 12-2: Install the PeopleSoft Enterprise Infosync Server and Client 9 CD

To Install the PeopleSoft Enterprise Infosync Server and Client 9:

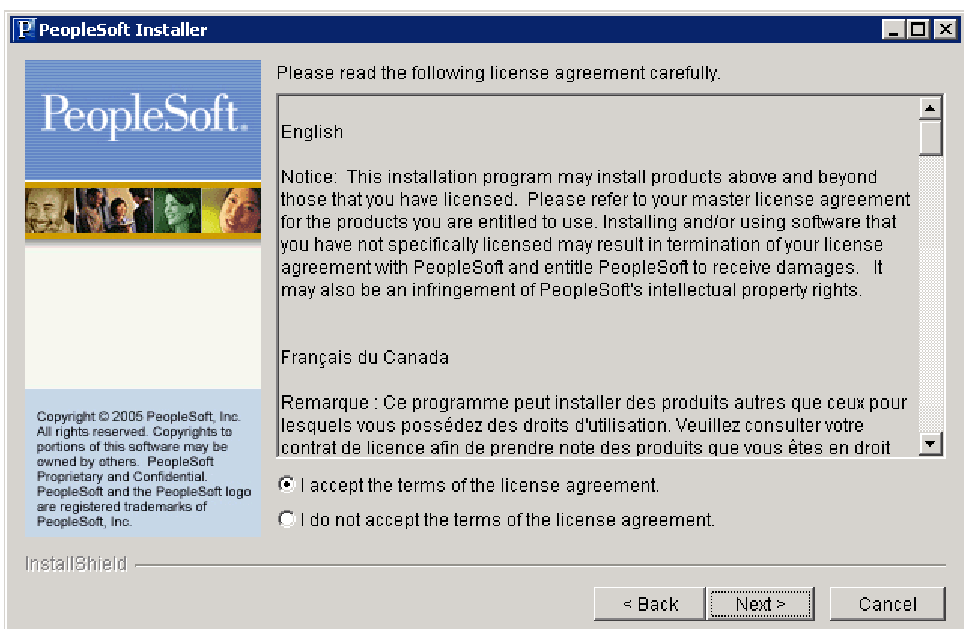
1. Insert the PeopleSoft Enterprise Infosync Server and Client 9 CD into the CD-ROM drive.

2. Run the Setup Program from the root directory of this CD.

3. Click Next in the Welcome Window to proceed to the Software License Agreement window.

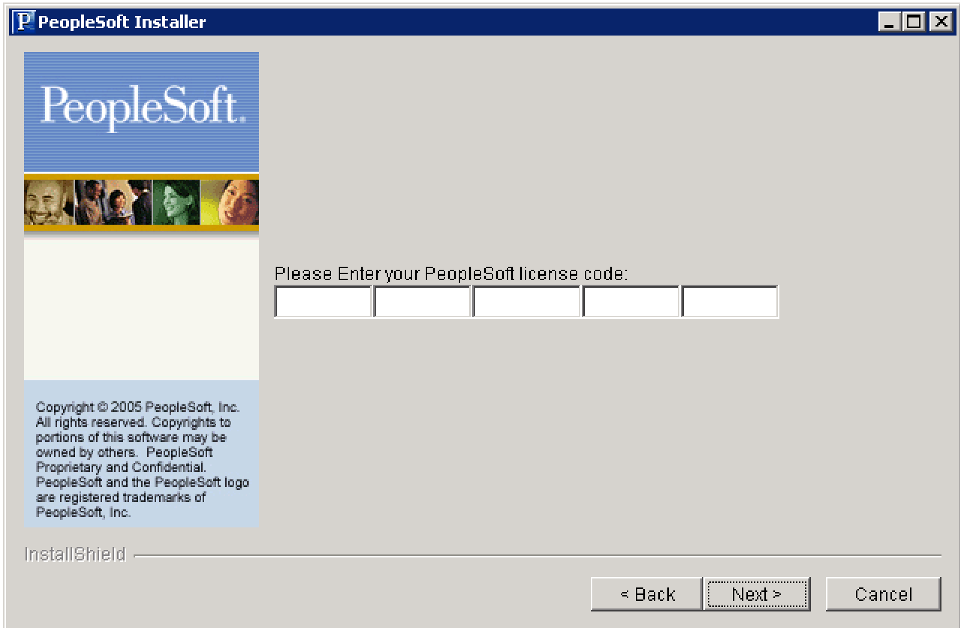
Welcome dialog

4. Read the license agreement, check “I accept the terms of the license agreement,” and click Next.



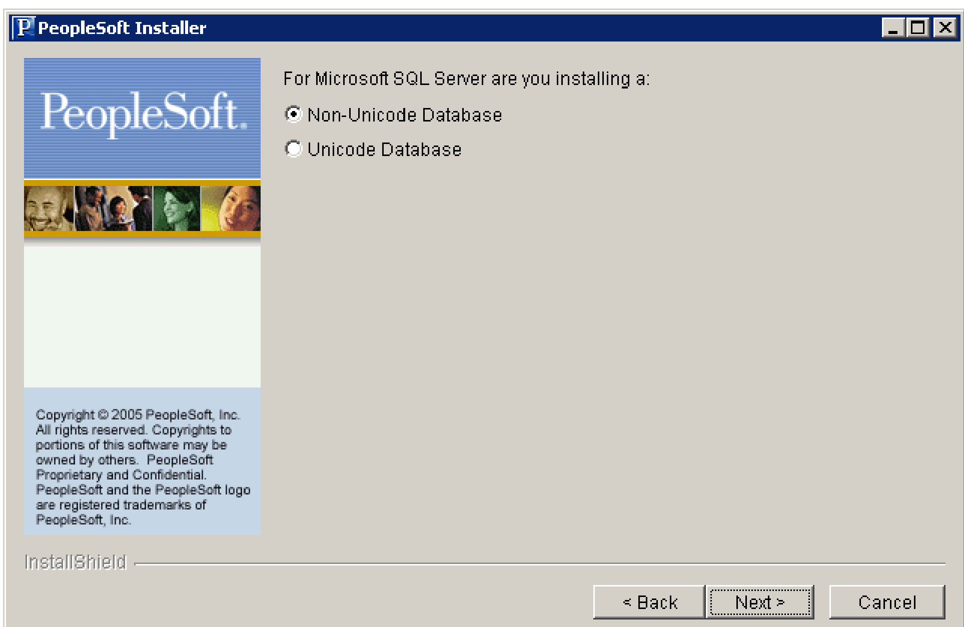
License Agreement dialog

5. Enter your organization’s PeopleSoft license code and click Next.



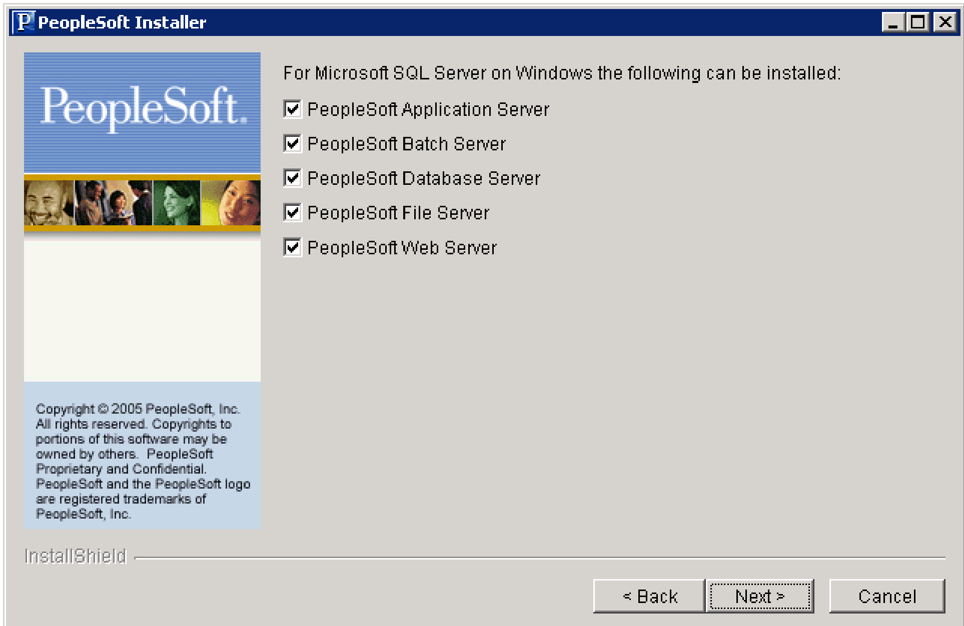
PeopleSoft License Code dialog

6. If you choose an Oracle, DB2 UDB for UNIX/NT, or Microsoft SQL Server database platform, then select either a Non-Unicode Database or a Unicode Database and click Next.



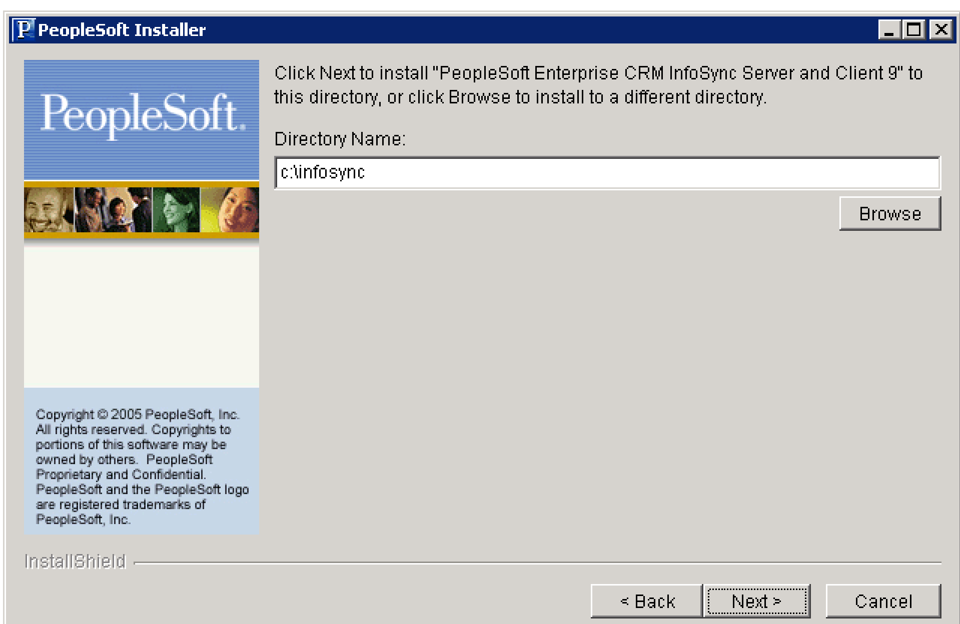
Database Platform Selection dialog

7. Select which of the following options you want to install and click Next.



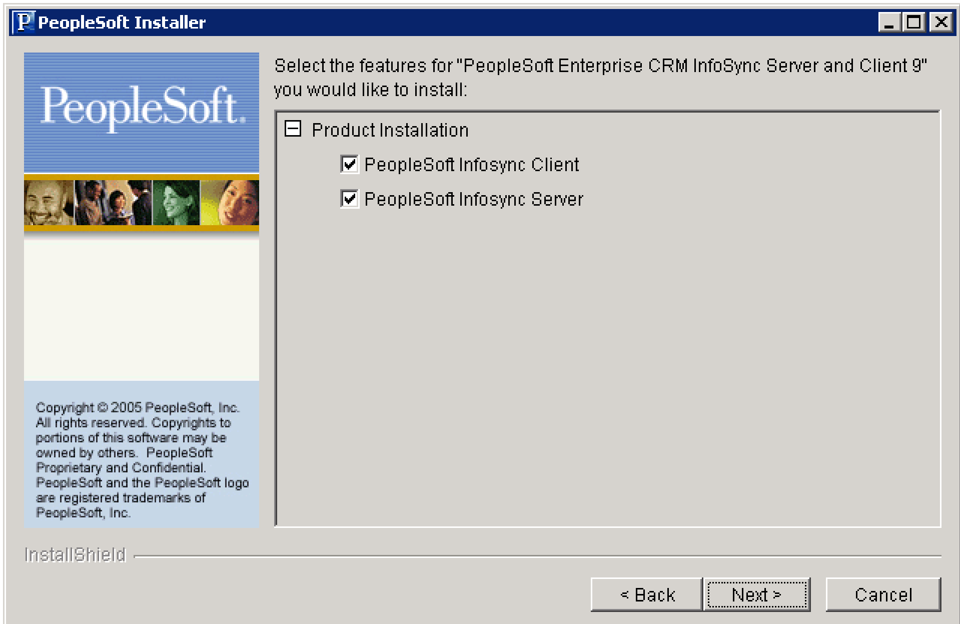
Platform Selection Options dialog

8. The installation default destination appears. Click Browse and enter your desired destination path. Then click Next.



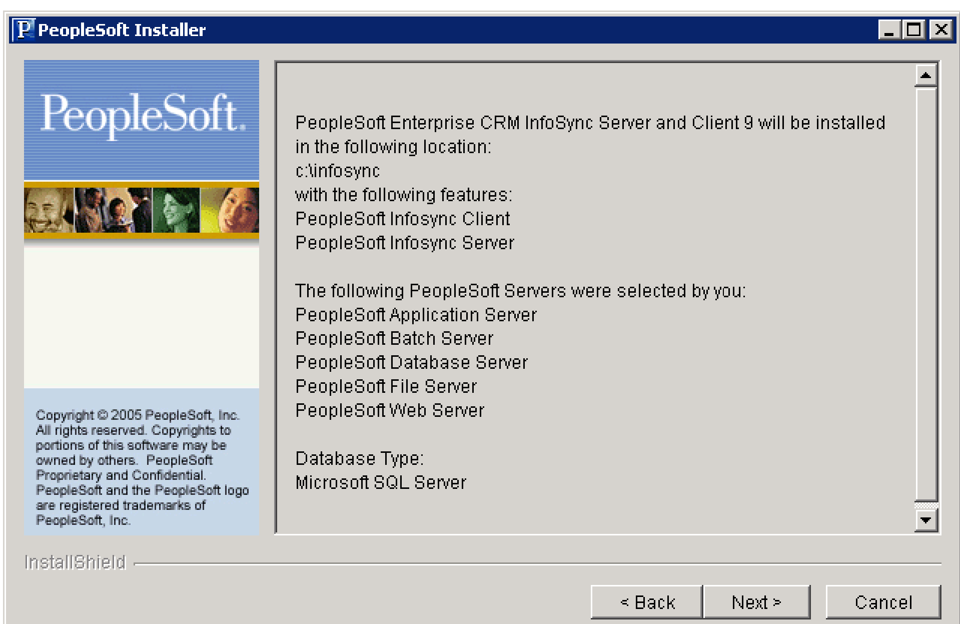
Default Destination dialog

9. Select the features you would like to install and click Next.



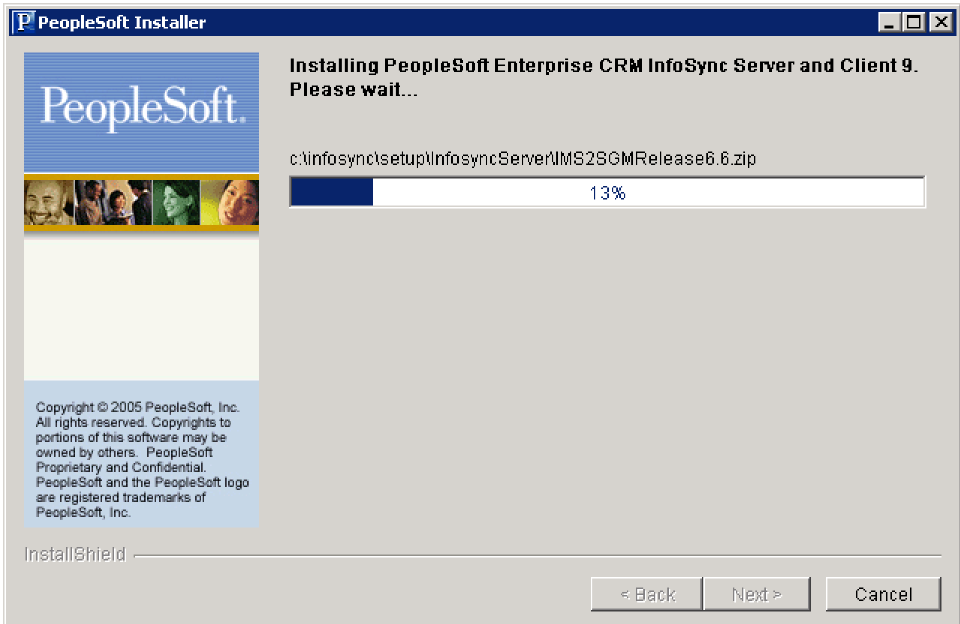
Feature Selection dialog

10. Click Next to confirm the installation.



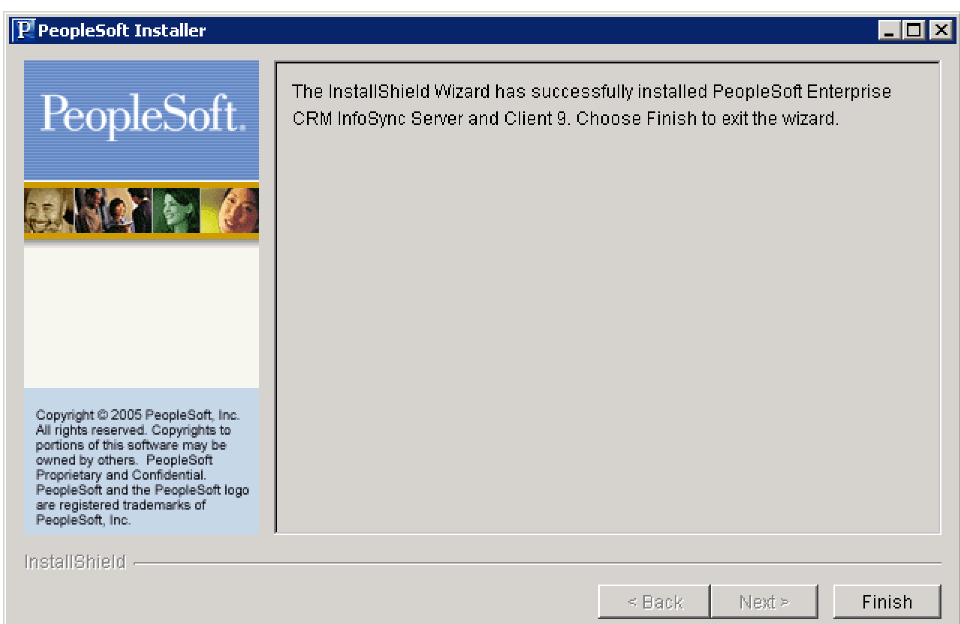
Confirmation dialog

11. The files will begin to install.



Installation Status dialog

12. Once the PeopleSoft Infosync Server has successfully completed installation, click Finish.



Installation Success dialog

13. The CD installs a setup directory. Depending on which features were selected for install, the setup directory will contain an InfosyncClient folder and/or InfosyncServer folder.

Task 12-3: Supported Platforms for the PeopleSoft Enterprise Infosync Server

This task describes the PeopleSoft Enterprise Infosync Server and the supported platforms for installation.

Knowledge and Skill Requirements

To install the PeopleSoft Enterprise Infosync Server, you must have the following skills and knowledge:

- An understanding of Microsoft Windows administration
- An understanding of groupware administration for the groupware platform that will be synchronized through the PeopleSoft Enterprise Infosync Server.
- The names “Infosync” and “Intellisync” and Email Accelerator are synonymous and may be used interchangeably throughout the installation.

Supported Languages

The PeopleSoft Enterprise Infosync Server is available in English, German, Japanese, French, and Spanish. In this release, PeopleSoft Enterprise Infosync Server components and the applications to which they connect, such as groupware, must all use the same language. The admin console is only available in English and Japanese.

Supported Systems

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

- Lotus Domino 5.0 Server with the Lotus Notes 5.0 client
- Lotus Domino 6.0 Server with the Lotus Notes 6.0 client
- Lotus Domino 6.5 Server with the Lotus Notes 6.5 client
- Microsoft Exchange Server 2000 with Microsoft Outlook 2000
- Microsoft Exchange Server 2003 with Microsoft Outlook 2003

Note. Multiple groupware servers can be synchronized, but all groupware servers must be the same version, such as Microsoft Exchange Server 2000. Also please note that for the machine that contains the Infosync Server, there are specific versions of certain dlls are needed for Outlook and Notes. This is only for the machine (or machines) that contains the Infosync Server and do not affect the rest of your organization. Please see the documentation EAInstall_Domino.doc and EAInstall_Exchange.doc install guides for details.

Task 12-4: Prepare the PeopleSoft Enterprise Infosync Server for Domino

Please read the document EAInstall_Domino.doc if you are installing this with a Domino server. This file can be found in the Intellisync directory when you unzip the Infosync Server zip file in Task 12-7. This document will walk you through all of the steps you need to perform before installing your Infosync Server for Domino.

Task 12-5: Prepare the PeopleSoft Enterprise Infosync Server for Exchange

Please read the document EAInstall_Exchange.doc if you are installing this with an Exchange server. This file can be found in the Intellisync directory when you unzip the Infosync Server zip file in Task 12-7. This document will walk you through all of the steps you need to perform before installing your Infosync Server for Exchange.

Task 12-6: Set Up the PeopleSoft Integration Broker

A complete PeopleSoft Integration Broker setup is required as part of the PeopleSoft Enterprise Infosync Server product to perform data synchronization between PeopleSoft Enterprise CRM and PIM servers. The setup delivers the PeopleSoft Integration Broker objects that are used in this integration. The information you set up in the PeopleSoft Integration Broker is needed to set up the URI specified in the PeopleSoft Enterprise Infosync installation:

- Two nodes: PSFT_INFOSYNC and PSFT_PIM.
- One transaction message: PIM_CONTACT_SYNC.
- Two code sets for data translation: INFOSYNC TO PIM and PIM TO INFOSYNC.

To Set Up PeopleSoft Enterprise Infosync with the PeopleSoft Integration Broker:

PeopleSoft recommends that you perform the following tasks before using PeopleSoft Integration Broker:

1. Select **PeopleTools, Integration Broker, Integration Setup, Node Definitions** to change the default password used in the external node (that is, PSFT_PIM). After you've made the password change on the Node Definitions page, click Save.

2. Modify the integrationGateway.properties file under:

   c:\<ps_home>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF:

   - If the integration gateway supports only one database, set up the integrationGateway.properties file with the default Application server like this:

     ```
     ig.isc.serverURL=//<yourappserver:jsl_port>
     ig.isc.userid=VP1
     ig.isc.password=Ez6NDsqOkxI=
     ig.isc.toolsRel=8.45.02
     ```

     Your values may vary from the example above.

   - If the integration gateway supports more than one database and you cannot set up the default application server to point to the correct database, set up a node as follows:

     ```
     ig.isc.<default local node in PIM
     database>.serverURL=//<yourappserver:jsl_port>
     ig.isc.<default local node in PIM database>.userid=VP1
     ig.isc.<default local node in PIM database>.password=Ez6NDsqOkxI=
     ig.isc.<default local node in PIM database>.toolsRel=8.45
     ```

     In every database there is only one default local node. The Default Local Node check box is selected for this node. Your values may vary from the example above.

Note. Make sure that the toolsRel value matches the version of your PeopleTools release.

3. If you change the Integration Broker user ID and password, make sure they are updated in the integrationGateway.properties file. For the password, enter it in the encrypted form. PeopleSoft provides a utility that returns an encrypted version for the password you provide. The utility is called pscipher.bat and is located in the c:\<ps_home>\webserv\peoplesoft directory. Run the utility from the command prompt as follows:

   c:\pt845\webserv\peoplesoft>pscipher <your_password>

4. Select **PeopleTools, Integration Broker, Configuration, Gateways** to access the Gateways page. Click Search for the local Gateways page and verify that the gateway URL is updated with the web server name on which the Integration Broker resides. If blank, enter the Gateway URL in the Gateway URL field. For example:

   http://<webserver name>:<port number>/PSIGW/PeopleSoftListeningConnector

   Then click the Load Gateway Connectors button to populate the connector information and click Save.

Note. Do not log on to the PeopleSoft Enterprise Infosync Server and perform synchronization using the same user ID that PeopleSoft Integration Broker uses, as specified in the integrationGateway.properties file.

Task 12-7: Install the PeopleSoft Enterprise Infosync Server

To Install the PeopleSoft Enterprise Infosync Server:

1. Unzip the IMS2SGMRelease6.6.zip file from the setup\InfosyncServer directory.

2. Double-click Setup.exe from the Intellisync directory to start the PeopleSoft Enterprise Infosync Server installation program.

   Please follow the directions in the Intellisync Mobile Suite install guide, called SynchroInstallGdeEN.pdf. It is found in the Intellisync directory where you unzipped the IMS2SGMRelease6.6.zip file. You do not need to worry about installing the client pieces. Those are not used in interfacing to Enterprise CRM.

   You will be prompted for a license key when installing. That license key is 034B4A42CBB4B5B4B5B4B54B4A43480BB9

Task 12-8: Set Up PeopleSoft Enterprise CRM Access

Adding the XML Node

To Add the XML Node:

1. Please read the document XMLConnector.pdf and follow the steps in that document to add an XML node. The document is found in the Intellisync\Documentation\English directory where you unzipped the IMS2SGMRelease6.6.zip file. In the remaining part of this document it is assumed that you named this node “PeopleSoft” and created a setting underneath the node as “Default”.

2. When prompted for an XML Connector ID please use 100.

Modifying the XML Connector Settings in the Admin Console

To Modify the XML Connector Settings:

1. Select **Start, Programs, Intellisync Mobile Suite, Admin Console** to access the administration functions. Expand the Intellisync Mobile Suite node if it is not expanded. Expand the Profile Settings node and then expand the Email Accelerator node. Expand the PeopleSoft node, and

select the Default node (or the one you installed), right click and choose Properties. A page will display where you can enter the following:

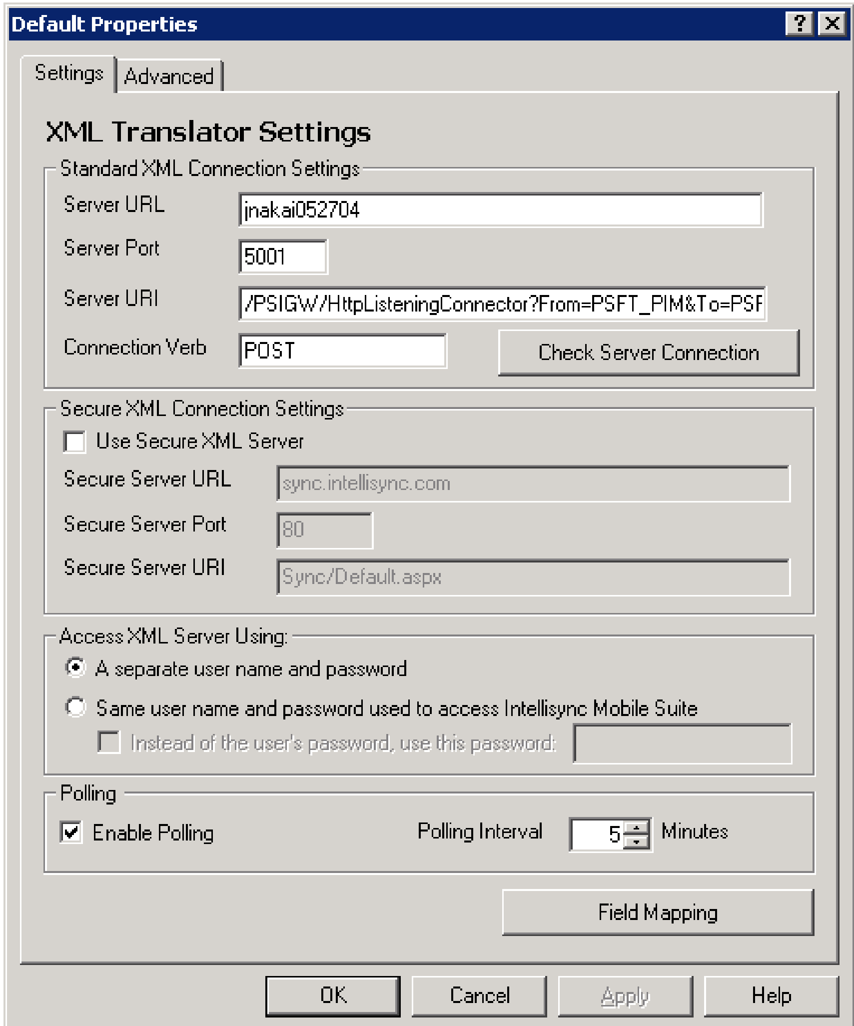
- For the Server URL, enter the web server name where your Integration Broker is running.
- For the Server port, enter the port number of the web server.
- For the Server URI, the string is determined by the integrationGateway.properties file.
  - If your integrationGateway.properties file has a default application server defined, type the following in the Server URI:

    /PSIGW/HttpListeningConnector?From=PSFT_PIM&MessageName=PIM_CONTACT_SYNC&MessageType=sync&Password=infosync

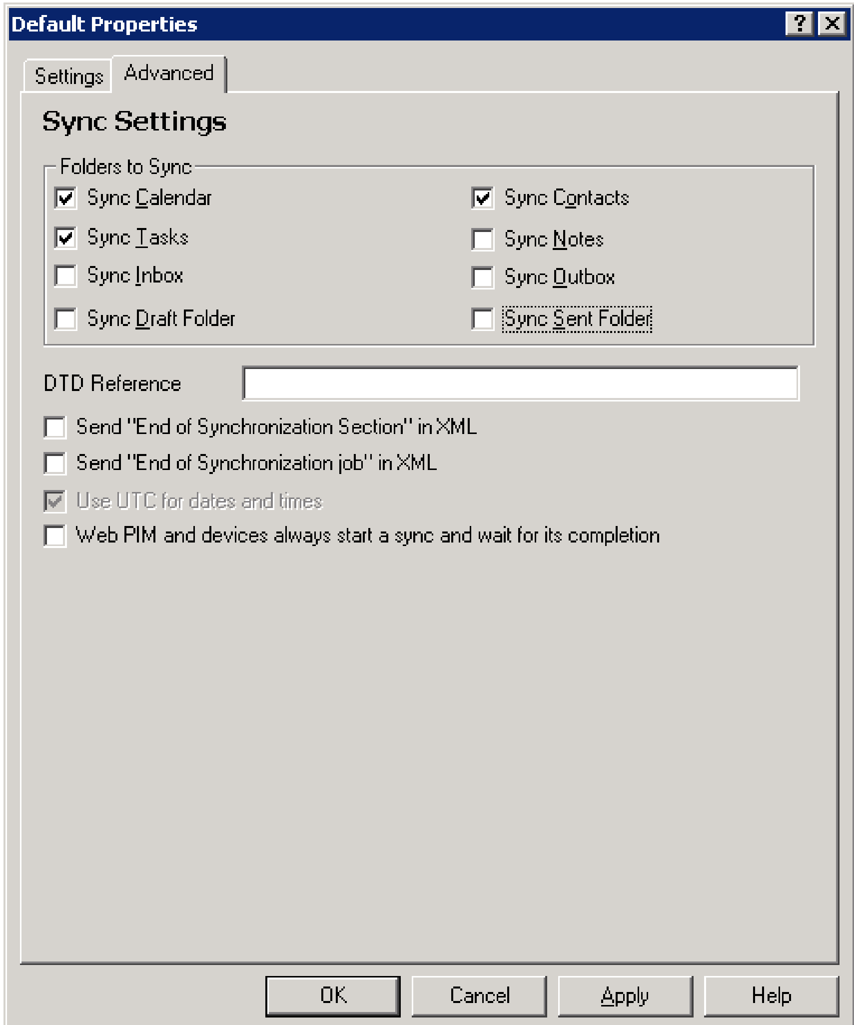
  - If your integrationGateway.properties file does not have a default application server defined and specifies a NODENAME, then type the following in the Server URI:

    /PSIGW/HttpListeningConnector?From=PSFT_PIM&To=<defaultLocalNode>&MessageName=PIM_CONTACT_SYNC&MessageType=sync&Password=infosync

- The <defaultLocalNode> should be replaced with the node defined as your default local node on your database and defined as the NODENAME pointing to the correct application server in the integrationGateway.properties file.
- If the default password that is used in the external node (PSFT_PIM) is changed, as recommended in Task 12-6, then you must also make the changes in the Server URI string. Replace the default password "infosync" with the new password. Click Save after making your modifications.
- Test the Check Server Connection after completing the Defining PIM Preferences section later in this task.



Click on the Advanced tab and verify that the Folders to Sync in the Sync Settings match the check boxes below. The Sync Calendar, Sync Tasks, and Sync Contacts should be the only boxes checked.



Enabling Signon PeopleCode

To Enable Signon PeopleCode for the PeopleSoft Enterprise Infosync Server Integration:

1. Select **PeopleTools**, **Security**, **Security Objects**, **Signon PeopleCode** to enable the Signon PeopleCode program on the Signon PeopleCode page and update the page with these settings:

2. Select the Invoke as user signing in option.

3. Add a new row for the PIM Signon PeopleCode program if it does not already exist. Click the + sign to add a new row.

4. Enter a sequence number. Select the Enabled check box for this row, and enter *FUNCLIB_PIM* as the Record, *PWDCNTL* as the Field Name, *FieldDefault* as the Event Name, and *PIM_Authentication* as the Function Name. Select the Exec Auth Fail check box.

5. Save the page.

6. Sign out of your database. Delete the application server cache and restart the application server.

> **Note**. Refer to the *PeopleTools Security PeopleBook* for more information on working with Signon PeopleCode and user exits.

Creating Users for Accessing PeopleSoft Enterprise CRM from the PeopleSoft Infosync Server

To Create User IDs that are Referenced in the PIM System Data Page:

1. Create the Transient ID as follows:

   Select **PeopleTools, Security, User Profiles, User Profiles** and create the user with the following settings:

   - On the General page, select a Symbolic ID and Password.
   - On the ID page, set ID Type to *None.*
   - Click Save.

Defining PIM System Data

To Define PIM Transient User:

1. Select **Set Up CRM**, **Install**, **PIM**, **PIM System Data** to access the PIM System Data page.

2. Define the following User IDs:

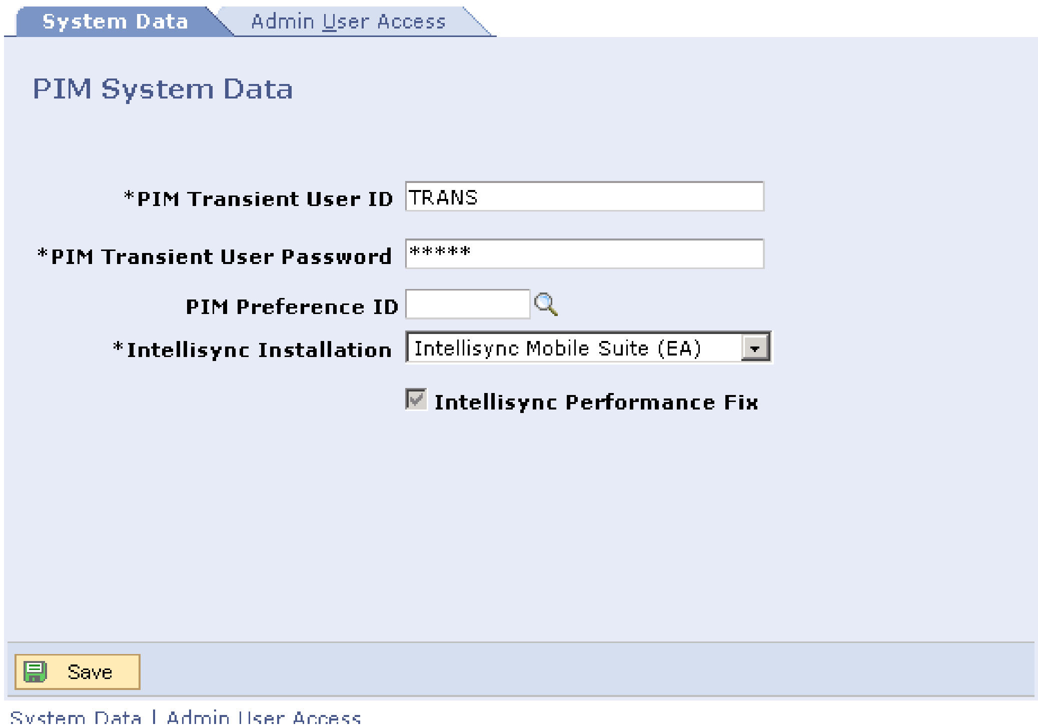
- PIM Transient User Id: Enter a user ID that serves as a transient user. This user was created in the previous section.
- PIM Transient User Password: Enter the password of the transient user.

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

To Define the Intellisync Installation:

1. Select **Set Up CRM**, **Install**, **PIM**, **PIM System Data** to access the PIM System Data page.

2. Select Intellisync Mobile Suite (EA) as the Intellisync Installation



PIM System Data page

Defining PIM Preferences

A PIM Preference ID must be assigned to a user before they can synchronize their data.

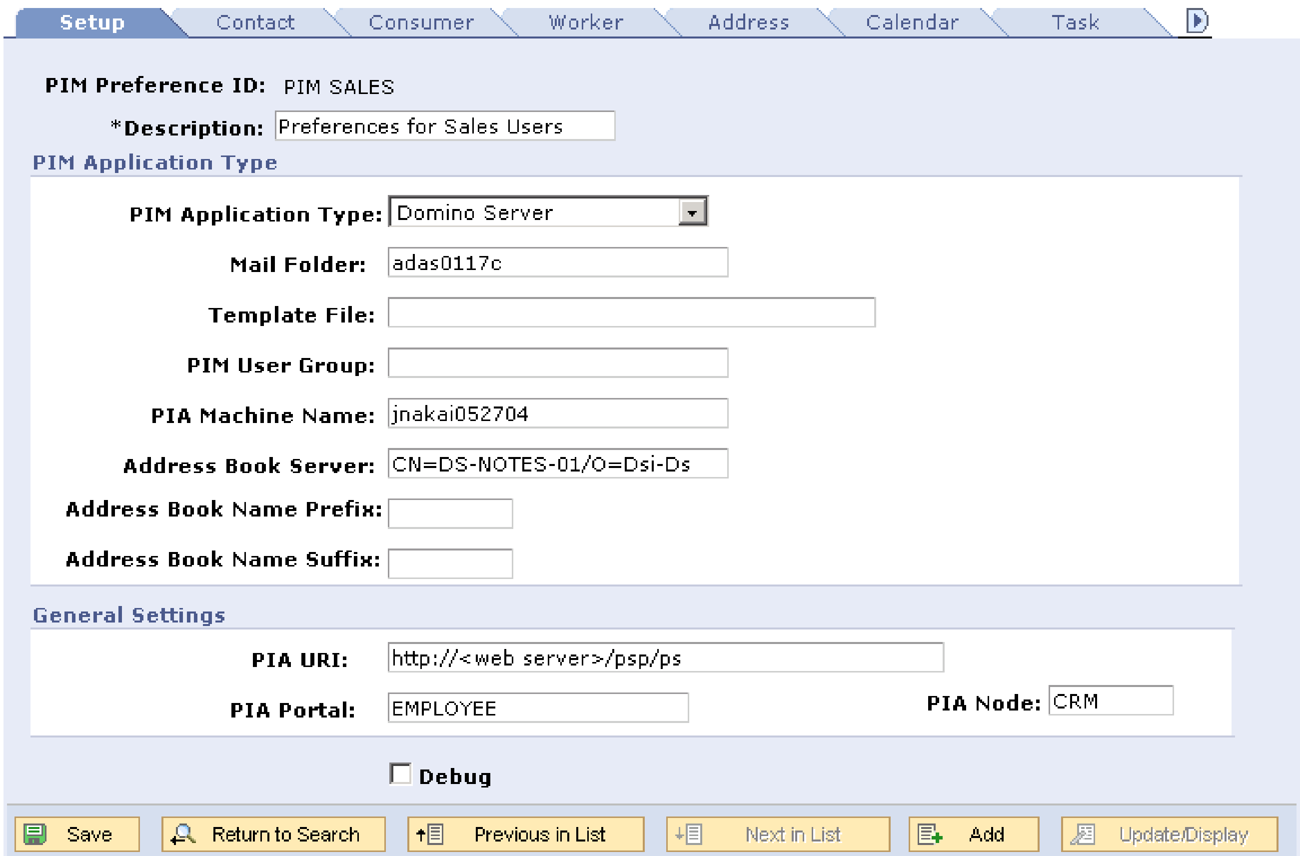
To Set a User's PIM Preference ID in PeopleSoft Enterprise CRM:

1. Log in to the CRM database using PIA.
2. Select **Set Up CRM, Security, User Preferences.**
3. Search for the User ID and select the PIM Preference ID for the user.
4. Click Save.
5. Select **Set Up CRM**, **Install**, **PIM**, **PIM Preferences** to access the PIM Preferences page.
6. Search for the PIM Preference ID that the user is assigned.
7. On the Setup page, select the PIM Application Type for your mail application (Exchange Server or Domino Server).

- If Exchange Server is selected, enter the Mail Domain Name and PIA Machine Name.

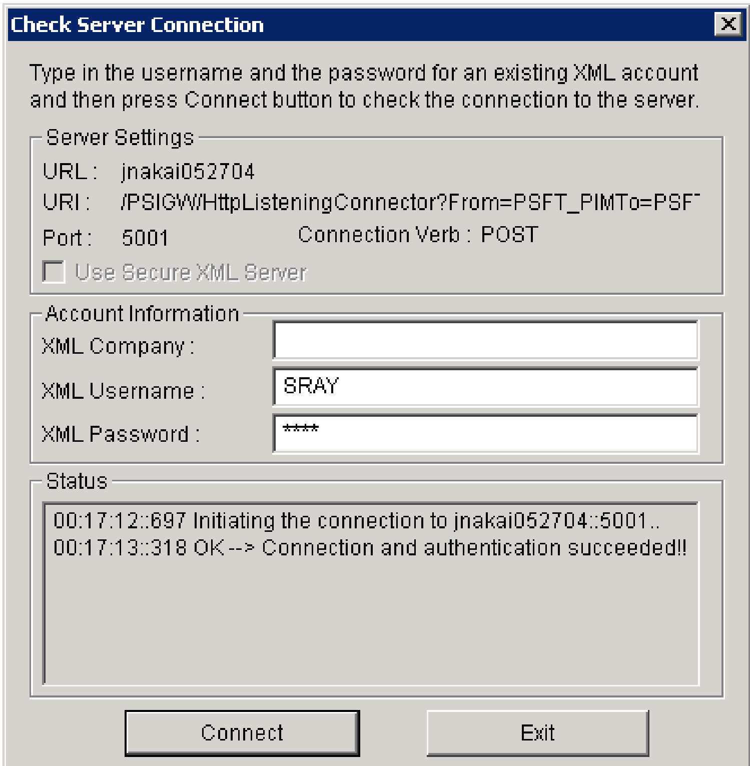
- If Domino Server is selected, enter the Mail Folder and PIA Machine Name.

8. Click Save.



PIM Preferences Setup page

9. Test the connection to the XML Connector. Select **Start, Programs, Intellisync Mobile Suite, Admin Console** to access the administration functions. Expand the Intellisync Mobile Suite node if it is not expanded. Expand the Profile Settings node and then expand the Email Accelerator node. Expand the PeopleSoft node (or the one you installed) and select the Default node, right click and choose Properties. Click on Check Server Connection and enter UserID in XML Username and password in XML Password for any of the users that you associated with a PIM Preference ID in step 3 of this section. Click on Connect. Status box should display a result of OK.



Check Server Connection dialog box

Task 12-9: Export Users from PeopleSoft Enterprise CRM to the PeopleSoft Enterprise Infosync Server

PeopleSoft Enterprise CRM delivers an AE (application engine) process (PIM_ID_SYNC) that exports PIM user IDs from the PeopleSoft Enterprise CRM system to a text file. The file is used by a utility to import users to the PeopleSoft Enterprise Infosync Server. There are two ways to run this AE process: one through PIA (PeopleSoft Internet Architecture) and the other through the DOS prompt.

To Run the AE Process through PIA:

Note. Make sure that the Process Scheduler is up and running before making any AE process requests on PIA.

1. Select **Set Up CRM**, **Install**, **PIM**, **PIM ID Export** to access the PIM ID Export page. You can use an existing run control to execute the AE process or add a new one.

2. Click Run. The Process Scheduler Request page appears.

3. Make sure *PIM_ID_SYN*Cis selected in the Process List group box and click OK.

4. On the PIM ID Export page, click the Process Monitor link to check the status of the AE process. Click Refresh until the Run Status returns *Success.*

5. Click the Details link.

6. The Process Detail page appears. Click the View Log/Trace link. File count depends on whether you have PIM Preferences for both Domino and Exchange, or just one. They are as follows:

- .stdout: contains the DOS prompt output.
- Infosync_Domino_ID_Import_<date/time>.txt: the user import text file that the Bulk User Import utility needs to import users to the PeopleSoft Enterprise Infosync Server. This file is specific to Lotus Domino Server. This file will not appear if no users were associated with PIM Preferences for Domino.
- Infosync_Exchange_ID_Import_<date/time>.txt: the user import text file that the Bulk User Import utility needs to import users to PeopleSoft Enterprise Infosync Server. This file is specific to Microsoft Exchange Server. This file will not appear if no users were associated with PIM Preferences for Domino.
- Infosync_ID_Import_Log.txt: the log file for the AE process. Here’s the format of the log file:

  <Date/time stamp>:<Message indicator>:<Actual message>
  where <Message indicator> can be *I* (information), *W* (warning), and *E* (error).

7. If your distribution node has not been set up on your process scheduler, the View Log/Trace link may not be active. Check for the Infosync_Domino_ID_Import_<date/time>.txt, Infosync_Exchange_ID_Import_<date/time>.txt, and Infosync_ID_Import_Log.txt files under c:\<ps_home>\appserv\<dbname>\prcs\<dbname>\files directory.

To Run the AE Process Through the DOS Prompt:

1. Open a DOS prompt. Change the directory to c:\<ps_home>\bin\Client\winx86.

2. Type the following command:

   PSAE -CT <Database Type> -CD <Database Name> -CO <User ID> -CP <Password> -R PIM_ID_SYNC -AI PIM_ID_SYNC

   where <Database Type> is the platform of the PeopleSoft Enterprise CRM database. For example, enter *MICROSFT* for a Microsoft SQL Server database, or *ORACLE* for an Oracle database. <Database Name> specifies the database name of the PeopleSoft CRM database. <User ID> and <Password> are the login information of the user in the PeopleSoft CRM database who requests the AE process.

3. Press Enter.

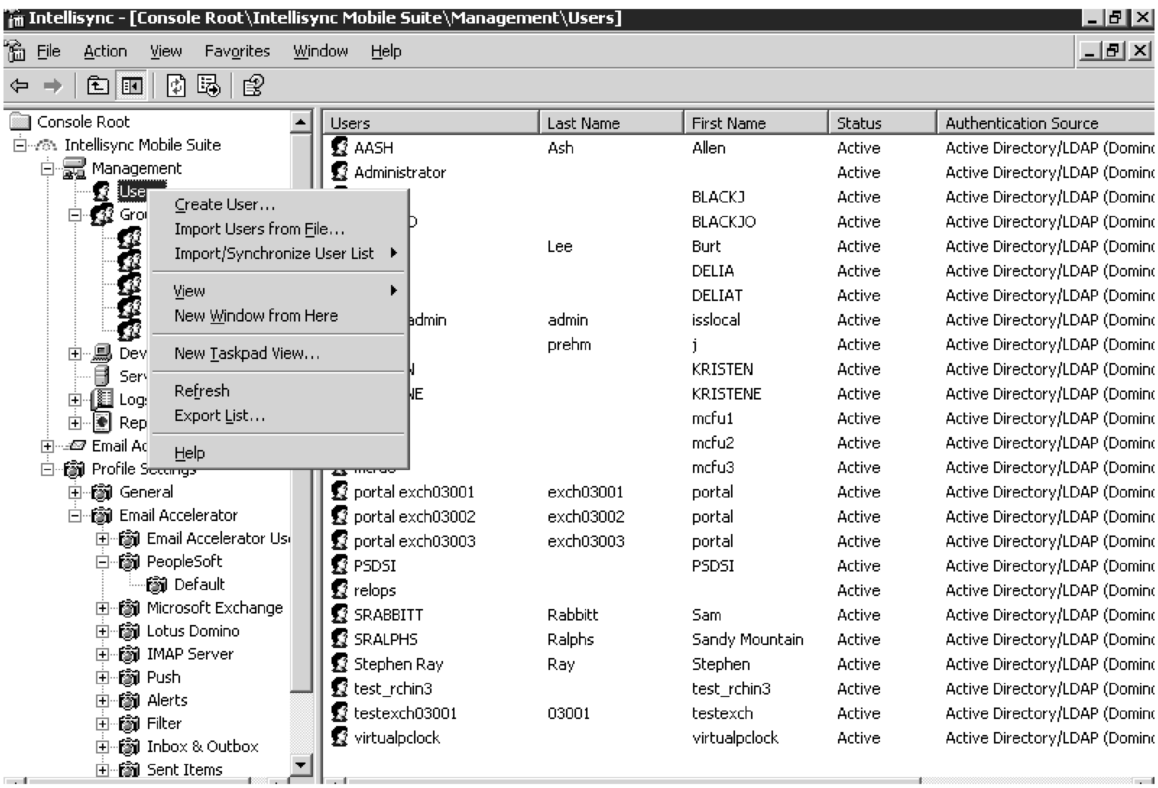
4. File count depends on whether you have PIM Preferences for both Domino and Exchange, or just one. Files are: Infosync_Domino_ID_Import_<date/time>.txt, Infosync_Exchange_ID_Import_<date/time>.txt, and Infosync_Import_Log.txt. Note that Infosync_Domino_ID_Import_<date/time>.txt file will not appear if no users were associated with

PIM Preferences for Domino, and Infosync_Exchange_ID_Import_<date/time>.txt will not appear if no users were associated with PIM Preferences for Exchange.

Task 12-10: Import Users into the PeopleSoft Enterprise Infosync Server

To Import Users into the PeopleSoft Infosync Server:

1. Select **Start**, **Programs**, **Intellisync Mobile Suite**, **Admin Console** on the Windows workstation where PeopleSoft Enterprise Infosync Server resides. Expand **the Intellisync Mobile Suite** Node. Expand the **Management** Node. Right click on the **Users** Node. Select **Import Users from File**.



Admin Console

2. A file select dialog box will open. Select the file that you want to import.

   After the import process completes, review the admin console Users node to confirm that the users have been created for everyone in the file.

Task 12-11: Prepare for the PeopleSoft Enterprise Infosync Client Installation

Verify that the following tasks have been completed. They are prerequisites for setting up the install workstation.

- The PeopleSoft Enterprise Infosync Client is supported on the Windows NT, 2000, and 2003 platform.
- You must have administrative access to install software on the workstation. The software install will write files to directories and update registry settings.
    - Verify that the PeopleSoft Integration Broker gateway is running on your PeopleSoft Enterprise CRM database.
    - Verify that during the setup of the PeopleSoft Integration Broker, the Gateway URL points to the PeopleSoftListening Connector. (i.e. http:/<webserver>/PSIGW/PeopleSoftListeningConnector).
    - Verify that the IntegrationGateway.properties file has been updated. Please see Task 12-6 for more detail.

Task 12-12: Install the PeopleSoft Enterprise Infosync Client

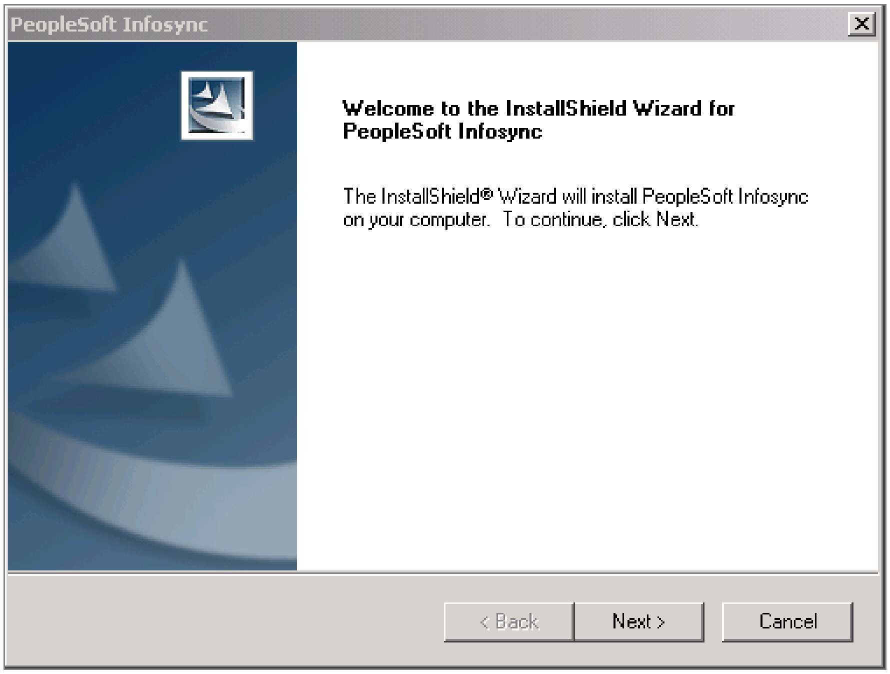
This software does not need to be installed on a workstation that has PeopleTools installed. However it will not hurt anything if it is installed on a workstation with PeopleTools.

As explained in Task 12-2 of this chapter, the CD installs a setup folder that contains an InfosyncClient directory. The InfosyncClient directory will contain the IntellisyncForPeopleSoft.exe file that is used to install the PeopleSoft Enterprise Infosync Client Software.

There are some configurations that you must perform for the PeopleSoft Enterprise Infosync Client which enable end users to have an easy installation process. You can send this file out to your end-users for installation on their workstations. However, each end-user must configure the software.

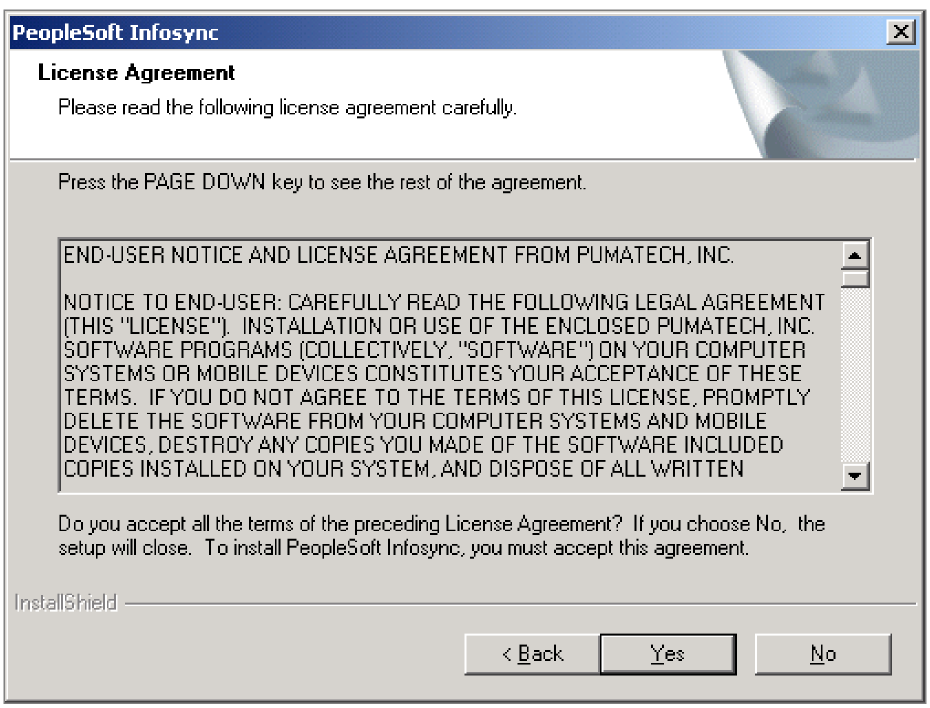
To Install the PeopleSoft Enterprise Infosync Client:

1. Double click the IntellisyncForPeopleSoft.exe in the setup\InfosyncClient directory.



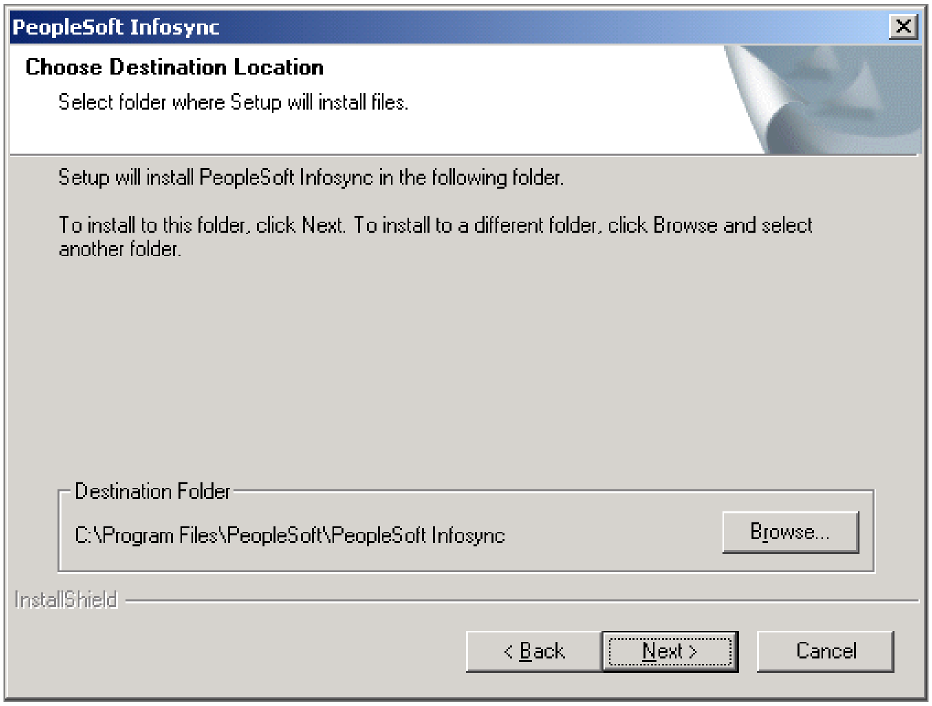
InstallShield Wizard dialog

2. Click Next.



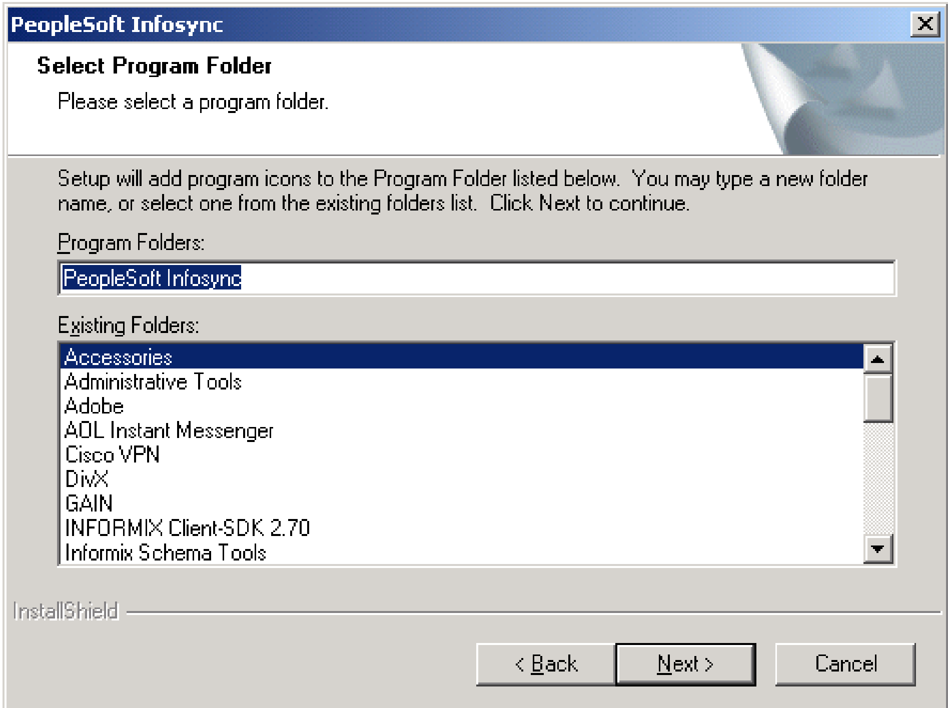
License Agreement dialog

3. Review and accept the license agreement and click Yes.



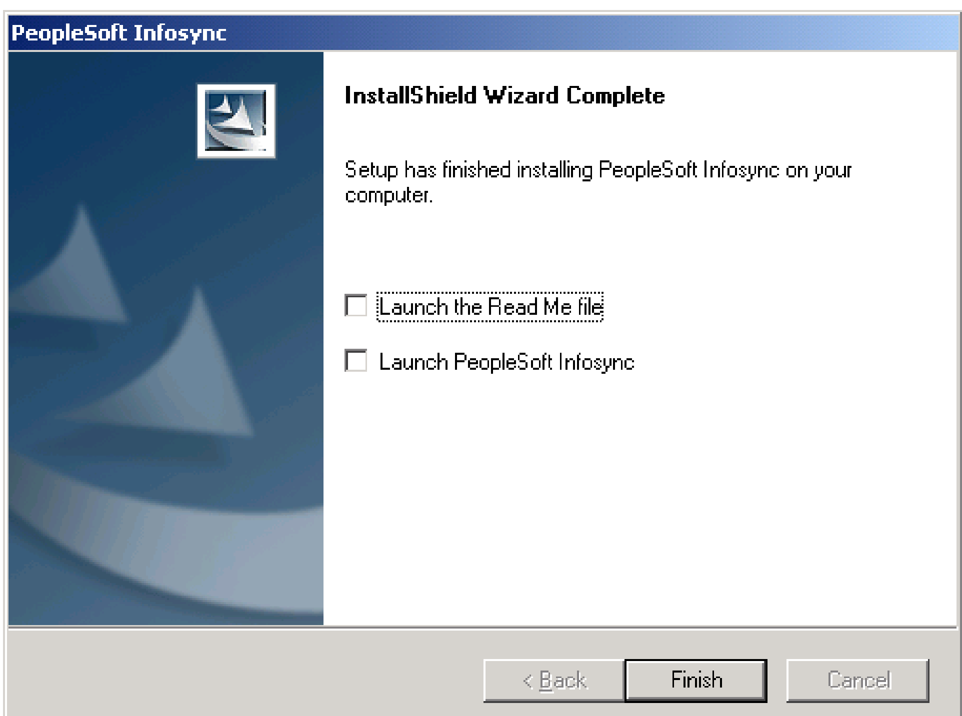
Destination Location dialog

4. Choose the Destination Location and click Next.



Select Program Folder dialog

5. Select the Program Folder and click Next.



InstallShield Wizard Complete dialog

6. After the PeopleSoft Infosync Client completes the install, click Finish.

7. Use any text editor to modify the configuration file named DCSSettings.CFG under C:\Program Files\PeopleSoft\PeopleSoft Infosync and change the Server URL, Port and URI to match the system setup for the Integration Broker and default node.

   For example,

```
[Connection]
Server URL=<web server>
Port=80
URI=/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=PSFT_CR&Messag
eName=PIM_CONTACT_SYNC&MessageType=sync&Password=Infosync
```

   where <web server> is the web server machine name and PSFT_CR is the default local node on the CRM database and defined in the integrationGateway.properties file. The “To” which precedes the default local node must have a lowercase “o”, as shown in the example above.

Task 12-13: Run the PeopleSoft Enterprise Infosync Client

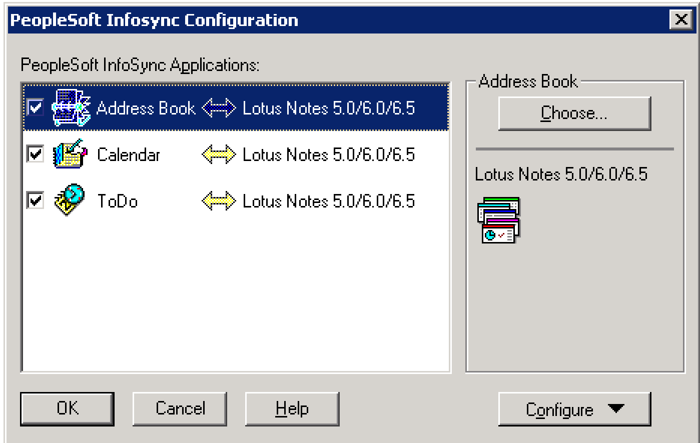
The first task in configuring the PeopleSoft Enterprise Infosync solution is to select which PIM applications your end-users are running.

To Set Up the PeopleSoft Enterprise Infosync Client:

1. Select **Start, Programs, PeopleSoft Inc, PeopleSoft Infosync, PeopleSoft Infosync** to start the PeopleSoft Enterprise Infosync Client.

2. Click the **Setup** button to specify synchronization settings.

3. Click on **Configure Applications**. Highlight the Address Book and click Choose. Select the Correct PIM software your end users will be running either Lotus Notes 4.5, Lotus Notes 4.6, Lotus Notes 5.0/6.0/6.5, or MS Outlook. Do the same for Calendar and ToDo.



PeopleSoft Infosync Configuration dialog

4. Highlight **Address Book** and select **Configure, Advanced Settings**.

- Select the Confirmation tab. If you want your end users to confirm deletes, check the first box. If you want your end users to confirm adds and changes, check the second box.
- Select the Conflict Resolution tab. Select the radio button for the conflict you wish to run.
- Select the Filters tab. The filter that is delivered is Categories. Select the appropriate filter or you may create your own.

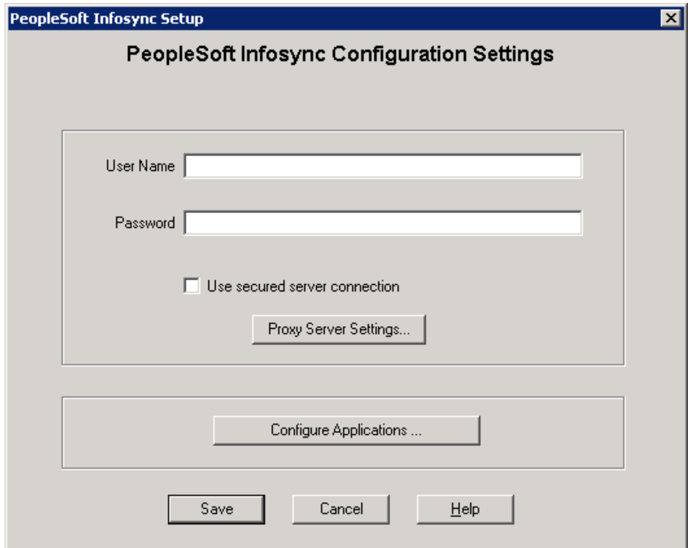
5. Highlight **Calendar** and select **Configure, Advanced Settings**.

- Select the Date Range tab. Choose the appropriate date range to synchronize.
- Select the Confirmation tab. If you want your end user to confirm deletes, check the first box. If you want your end users to confirm adds and changes, check the second box.
- Select the Conflict Resolution tab. Select the radio button for the conflict you wish to run.
- Select the Filters tab. The three filters that are delivered are Exclude Private Data, Categories, and Categories and Private. Select the appropriate filter or you may create your own.

6. Highlight **ToDo** and select **Configure, Advanced Settings**.

- Select the ToDo tab. Select the appropriate radio button for the transferring ToDo items.
- Select the Confirmation tab. If you want your end user to confirm deletes, check the first box. If you want your end users to confirm adds and changes, check the second box.
- Select the Conflict Resolution tab. Select the radio button for the conflict you wish to run.
- Select the Filters tab. The three filters that are delivered are Exclude Private Data, Categories, and Categories and Private. Select the appropriate filter or you may create your own. Please see the documentation regarding the interaction between the filters in the Pumatech software and the categories you select on the PIM Preferences.

7. Click OK.



PeopleSoft Infosync Setup dialog

8. Enter a User Name and Password for synchronization. The User must have a PIM Preference ID assigned. Click Save.

Note. A PIM Preference ID must be assigned to a user before they can synchronize their data. A user's PIM Preference ID is set in the CRM database. Log in to the CRM database using PIA and select **Set Up CRM**, **Security**, **User Preferences**. Search for the User ID and select the PIM Preference ID for the user. Click Save.

To Run the PeopleSoft Enterprise Infosync Client for Synchronization:

1. Select **Start, Programs, PeopleSoft Inc, PeopleSoft Infosync, PeopleSoft Infosync** to start the PeopleSoft Enterprise Infosync Client.

2. Click the **Sync** button to synchronize your data.

CHAPTER 13

INSTALLING PEOPLESOFT ONLINE MARKETING 8.9 AND STUDENT ADMINISTRATION INTEGRATION 8.0SP1 AND 8.9

This chapter provides instructions for setting up PeopleSoft Online Marketing 8.9 and Student Administration Integration 8.0SP1 and 8.9.

> **Note.** Before proceeding with your installation, check Continuous Documentation on Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 8.9 Supplemental Installation Guide*, *PeopleTools Installation and Administration PeopleBook*, and *PeopleSoft PeopleTools 8.45 PeopleBook.*
>
> **Note**. In addition, we recommend that you consult the PeopleSoft Enterprise CRM 8.9 Product-to-PeopleBook Index located on the My Oracle Support website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

Task Overview

The following table summarizes this chapter's tasks.

Complete Tasks 13-1 through 13-9 for installation on the PeopleSoft Student Administration side.

Task No.	Task Name
Task 13-1	Review System Configuration Requirements for PeopleSoft Student Administration
Task 13-2	Activate Message Statuses

Task 13-3	Set Up Message Channels
Task 13-4	Define Full Data Publish Rules
Task 13-5	Verify PERSON_BASIC_FULLSYNC and PERSON_BASIC_SYNC Message Statuses
Task 13-6	Verify Connectivity
Task 13-7	Set Message Monitor Security
Task 13-8	Grant Security for New Application Engine Processes and New Pages
Task 13-9	Use the ADCRMPST Job Definition

Complete tasks 13-10 through 13-23 on the PeopleSoft Customer Relationship Management installation.

In addition, you must complete tasks 13-18, 13-19, and 13-22 on the PeopleSoft Student Administration installation.

Task No.	Task Name
Task 13-10	Run OLM_CS_SETUP.dms
Task 13-11	Set Up and Test the EIP Configuration in the CRM Database
Task 13-12	Define the Business Unit (EGUBU) for the CRM Database
Task 13-13	Run Data Mover Scripts to Import Sample Data into the CRM Database
Task 13-14	Set Up the Web Template's URL to a Valid Template File Location in the CRM Database
Task 13-15	Establish Valid Mailbox Email Addresses
Task 13-16	Set Up CS Communication Sync page Permissions in the CRM Database
Task 13-17	Set Up the Full Data Publish Rule for Topic IDs (Dialog Questions) in the CRM Database
Task 13-18	Set Up the FTP Server for the PeopleSoft SA Database
Task 13-19	Populate Profile Attribute Choices from SA to CRM
Task 13-20	Clean Up and Reset Profile Related Data Integrity in the CRM Database
Task 13-21	Activate CRM Profiles in the CRM Database
Task 13-22	Populate Student Data from PeopleSoft SA to PeopleSoft CRM
Task 13-23	Post Dialog Questions from PeopleSoft CRM to SA in the CRM Database (Optional)

Before You Begin

Before you perform the tasks in this chapter you must have installed and configured a PeopleSoft Enterprise CRM 8.9 database and a PeopleSoft Student Administration database (SA 8.9 is now merged with HCM8.9).

Task 13-1: Review System Configuration Requirements for PeopleSoft Student Administration

Configuring the PeopleSoft Student Administration database for integration to PeopleSoft CRM begins with the following steps:

1. Activate Message Statuses.
2. Set up Message Channels.
3. Define Full Data Publish Rules.
4. Verify PERSON_BASIC_FULLSYNC and PERSON_BASIC_SYNC Message Statuses.
5. Verify Connectivity.
6. Set Message Monitor Security.
7. Grant security for the Application Engine process and new pages.
8. Use the ADCRMPST Job Definition.

Task 13-2: Activate Message Statuses

To Activate Message Statuses:

Open each of the following messages and verify that the status is set to Active (in the message properties tab). If not, change it to active and save.

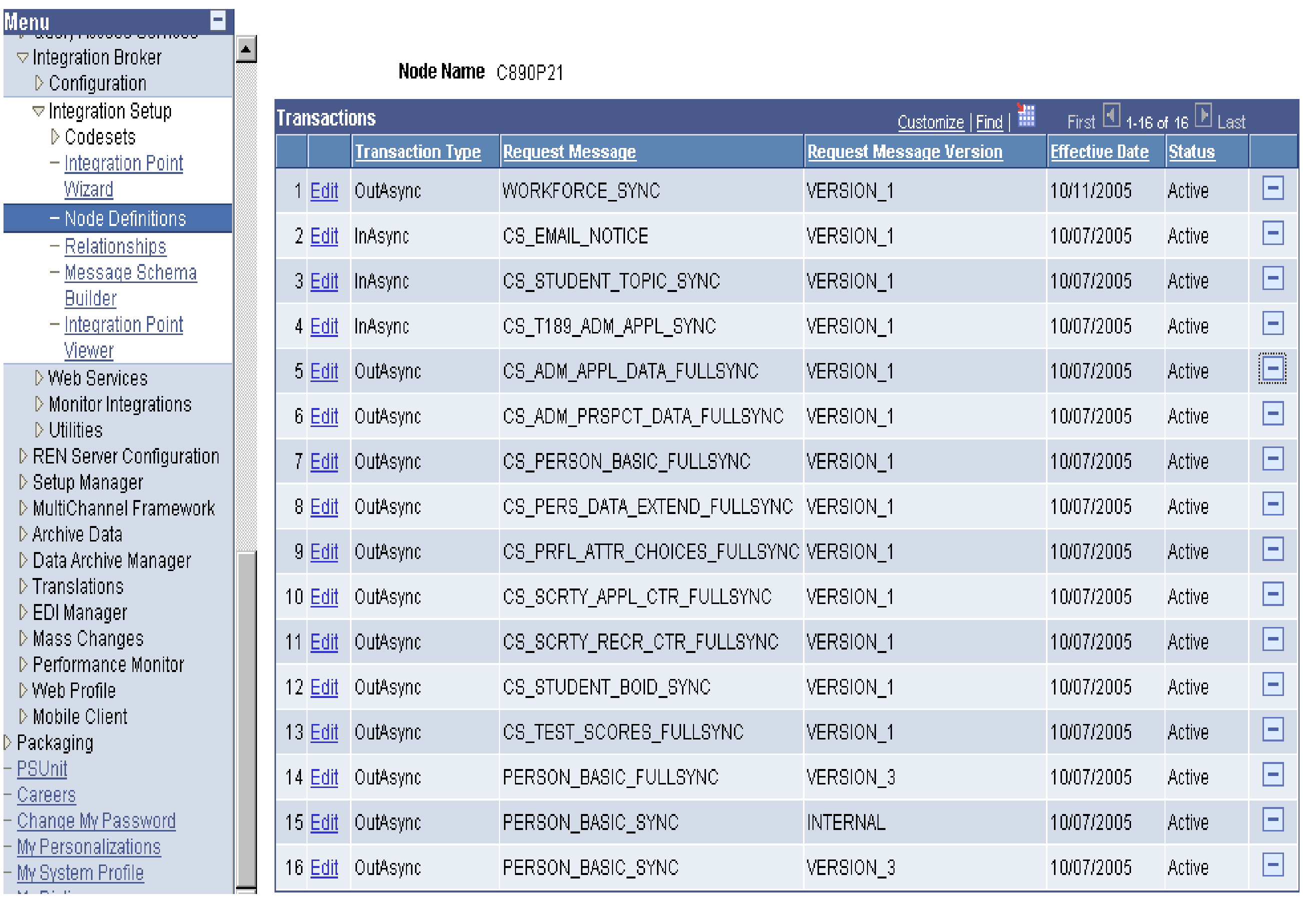
1. Open each message in Application Designer.
2. Select the Message Properties Use tab.
3. Set the status of the following messages to Active:
    - CS_ADM_APPL_DATA_FULLSYNC
    - CS_ADM_PRSPCT_DATA_FULLSYNC
    - CS_PERS_DATA_EXTEND_FULLSYNC
    - CS_TEST_SCORES_FULLSYNC
    - CS_SCRTY_APPL_CTR_FULLSYNC
    - CS_SCRTY_RECR_CTR_FULLSYNC

- CS_EMAIL_NOTICE
- CS_STUDENT_BOID_SYNC
- CS_T189_ADM_APPL_SYNC
- CS_PRFL_ATTR_CHOICES_FULLSYNC
- CS_STUDENT_TOPIC_SYNC
- PERSON_BASIC_SYNC **(SA 8.9 only)**
- PERSON_BASIC_FULLSYNC **(SA 8.9 only)**
- CS_PERSON_BASIC_FULLSYNC **(SA 8.0SP1 only)**

4. For SA 8.9, the above messages need to be added as transactions in the CRM Node in SA Database.

   ❑ Navigate to Main Menu, PeopleTools, Integration Broker, Node Definition.

   ❑ Select the CRM Node Name you have defined in the SA Database and enter the transactions in the Transactions tab as follows:



		Transaction Type	Request Message	Request Message Version	Effective Date	Status
1	Edit	OutAsync	WORKFORCE_SYNC	VERSION_1	10/11/2005	Active
2	Edit	InAsync	CS_EMAIL_NOTICE	VERSION_1	10/07/2005	Active
3	Edit	InAsync	CS_STUDENT_TOPIC_SYNC	VERSION_1	10/07/2005	Active
4	Edit	InAsync	CS_T189_ADM_APPL_SYNC	VERSION_1	10/07/2005	Active
5	Edit	OutAsync	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	10/07/2005	Active
6	Edit	OutAsync	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	10/07/2005	Active
7	Edit	OutAsync	CS_PERSON_BASIC_FULLSYNC	VERSION_1	10/07/2005	Active
8	Edit	OutAsync	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	10/07/2005	Active
9	Edit	OutAsync	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	10/07/2005	Active
10	Edit	OutAsync	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	10/07/2005	Active
11	Edit	OutAsync	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	10/07/2005	Active
12	Edit	OutAsync	CS_STUDENT_BOID_SYNC	VERSION_1	10/07/2005	Active
13	Edit	OutAsync	CS_TEST_SCORES_FULLSYNC	VERSION_1	10/07/2005	Active
14	Edit	OutAsync	PERSON_BASIC_FULLSYNC	VERSION_3	10/07/2005	Active
15	Edit	OutAsync	PERSON_BASIC_SYNC	INTERNAL	10/07/2005	Active
16	Edit	OutAsync	PERSON_BASIC_SYNC	VERSION_3	10/07/2005	Active

Task 13-3: Set Up Message Channels

To Set Up the Message Channels:

The default message channels provided are SAD_CRM_DATA, SAD_CRM_SETUP, and PERSON_DATA.

1. Open each message channel in Application Designer.

2. If you are installing **SA 8.0SP1**, select the Routing Rules tab and add the CRM node (create a new node with the name of the CRM instance) to be used for these messages.

   This node is likely to have the same name as the CRM instance, for example, C80R20.

3. Verify that the following Messages are in Message Channel SAD_CRM_DATA:

   - CS_ADM_APPL_DATA_FULLSYNC
   - CS_ADM_PRSPCT_DATA_FULLSYNC
   - CS_EMAIL_NOTICE
   - CS_PERS_DATA_EXTEND_FULLSYNC
   - CS_SCRTY_APPL_CTR_FULLSYNC
   - CS_SCRTY_RECR_CTR_FULLSYNC
   - CS_STUDENT_BOID_SYNC
   - CS_T189_ADM_APPL_SYNC
   - CS_TEST_SCORES_FULLSYNC
   - CS_PERSON_BASIC_FULLSYNC **(SA 8.0SP1 only)**

4. Verify that the following Messages are in Message Channel SAD_CRM_SETUP:

   - CS_PRFL_ATTR_CHOICES_FULLSYNC
   - CS_STUDENT_TOPIC_SYNC

5. Verify that the following Messages are in Message Channel PERSON_DATA:

   - PERSON_BASIC_SYNC
   - PERSON_BASIC_FULLSYNC

Task 13-4: Define Full Data Publish Rules

To Set Up Full Data Publish Rules:

A rule must be defined for each full sync message that is defined in your system.

1. For **SA 8.0SP1**, navigate to **Home, Define Business Rules, Manage Integration Rules, Use, Full Table Publish Rules**.

   For **SA 8.9**, navigate to **Enterprise Components, Integration Definitions, Full Data Publish Rules**.

2. Create full data publish rules for the message CS_ADM_APPL_DATA_FULLSYNC:

   a) On the ‘Full Table Publish Rules’ tab, enter a Publish Rule ID and Description.

   b) Switch the Status flag to ‘Active.’

   c) Turn ON the ‘Create Message Header’ option.

   d) On the Record Mapping tab, enter the following:

Message Record Name	Source/Order by Record Name
ADM_APPL_DATA	SAD_CRM_FLT_DAT
ADM_APPL_PROG	SAD_CRM_FLT_PRG
ADM_APPL_PLAN	SAD_CRM_FLT_PLN
ADM_APPL_SBPLAN	SAD_CRM_FLT_SPL

3. Create a rule for each of the messages listed below. Be sure to turn the Header option on for each message.

Message Name	Message Record Name	Source/Order by Record Name
CS_ADM_PRSPCT_DATA_FULLSYNC	ADM_PRSPCT_CAR	SAD_CRM_FLT_PRS
CS_PERS_DATA_EXTEND_FULLSYNC	PERSONAL_DATA	SAD_CRM_FLT_PER
CS_SCRTY_APPL_CTR_FULLSYNC	No mapping required	
CS_SCRTY_RECR_CTR_FULLSYNC	No mapping required	
CS_TEST_SCORES_FULLSYNC	STDNT_TEST	SAD_CRM_FLT_TST

4. **If you are installing SA 8.0SP1**, define the Publish Rule for CS_PERSON_BASIC_FULLSYNC.

   a) On the Full Table Publish Rules tab, enter a Publish Rule ID and Description (Person_Basic_Full).

   b) Switch the Status flag to ‘Active.’

c) Turn ON the ‘Create Message Header’ option.

d) On the Record Mapping tab, enter:

Message Record Name: PERSONAL_DATA
Source/order by Record name: SAD_CRM_FLT_PER

e) On the Full Table Publish Rules tab, enter a Publish Rule ID and Description (Person_Basic_Inc).

f) Switch the Status flag to Inactive.

g) Turn ON the Create Message Header option.

h) On the Record Mapping tab, enter:

Message Record Name: PERSONAL_DATA
Source/order by Record name: SAD_CRM_FLT_BAS

Note. This new row can be used to perform incremental full sync publishes based on the last run date of the process.

The first row is active for the first full publish sync performed. It uses the view, PS_SAD_CRM_FLT_PER, to filter the integration based on EMPLIDS that exist in the PS_SAD_CRM_ EMPLIDS table.

After the first run, this row can be switched to Inactive and the second row activated. 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 have a PERS_DATA_EFFDT that is greater than or equal to the last run date of the process.

CS_PERSON_BASIC_FULLSYNC is not needed for SA 8.9.

5. Load profile choices for the message CS_PRFL_ATTR_CHOICES_FULLSYNC:

a) On the ‘Full Table Publish Rules’ tab, create a new row for each of the choice types listed in step e).

b) Create a unique Publish Rule ID and Description for each.

c) Set the status to Active.

d) Turn OFF the Create Message Header and Create Message Trailer options.

e) On the Record Mapping tab, for Message Record Name, SAD_CRM_ACH_WRK, configure the following:

Publish Rule ID	Description	Source/Order by Record Name
ACTIONS	Program Actions	SAD_CRM_ACTN_VW
APP_CENTERS	Application Centers	SAD_CRM_ACTR_VW

Publish Rule ID	Description	Source/Order by Record Name
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	Exp Grad Terms	SAD_CRM_GTRM_VW
GPA_TYPES	GPA Types	SAD_CRM_GTYP_VW
INSTITUTIONS	Institutions	SAD_CRM_INST_VW
PLANS	Acad Plans	SAD_CRM_PLAN_VW
PROGRAMS	Acad Programs	SAD_CRM_PROG_VW
RECRUIT_CAT	Recruiting Cat	SAD_CRM_RCAT_VW
REC_CENTERS	Recruiting Centers	SAD_CRM_RCTR_VW
ACTN_REASONS	Prog Act 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_SMTP_VW
SUB_PLANS	Acad 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 13-5: Verify PERSON_BASIC_FULLSYNC and PERSON_BASIC_SYNC Message Statuses

To Verify PERSON_BASIC_FULLSYNC and PERSON_BASIC_SYNC Message Statuses:

PeopleSoft Student Administration 8.0SP1

If the PeopleSoft Student Administration 8.0SP1 database is not currently configured for integration to PeopleSoft CRM, then set the messages PERSON_BASIC_FULLSYNC and PERSON_BASIC_SYNC to **Inactive.**

PeopleSoft Student Administration 8.9

If your PeopleSoft Student Administration 8.9 database is currently configured for integration to PeopleSoft CRM 8.9, then set the messages PERSON_BASIC_FULLSYNC and PERSON_BASIC_SYNC to **Active**.

Refer to

Task 13-6: Verify Connectivity

To Verify Connectivity:

1. **For SA 8.0SP1**, select **Home, PeopleTools, Application Message Monitor, Use, Application Message Monitor**.

   For **SA 8.9**, select **Home, People Tools, Integration Broker, Monitor Integrations, Monitor Message**.

2. On the Channel Status tab, check the status for the channels that are being used for the project messages (the default channels are SAD_CRM_DATA, SAD_CRM_SETUP, PERSON_DATA). If the channels are currently paused, then click the 'Run' pushbutton to activate them.

3. Select the Node Status tab and ping the CRM node that will be used for these messages (this node is typically the same name as the CRM instance being used). If the node does not ping successfully, then there is a problem with the URL on the node definition in Application Designer.

4. Select the Domain Status tab and check that the dispatchers are active. If the status is Inactive, then change the status to Active and click the Update button.

Task 13-7: Set Message Monitor Security

To Set Message Monitor Security:

1. **For SA 8.0SP1**, select **Home, PeopleTools, Maintain Security, Use, Permission Lists**.

   For SA 8.9, select **Home, PeopleTools, Security, Permissions & Roles, Permission Lists**

2. Select the desired permission list.

3. Select the Message Monitor tab.

4. Verify that FULL access is granted for

   SAD_CRM_DATA
   SAD_CRM_SETUP
   PERSON_DATA

Task 13-8: Grant Security for New Application Engine Processes and New Pages

To Grant Security for New Application Engine Processes and New Pages:

1. **For SA 8.0SP1**, select **Home, PeopleTools, Maintain Security, Use, Permission Lists**.

   For SA 8.9, select **Home, PeopleTools, Security, Permissions & Roles, Permission Lists.**

2. Select the desired Permission List (e.g. ALLPANLS for testing).

3. Select the Pages tab.

4. Add the menus SAD_CRM_INTEGRATION, EVALUATE_APPLICANTS, and LOAD_EXTERNAL_DATA.

5. Select 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 this menu item.

There are two methods delivered with the system to run the Application Engine process that posts the File Attachment Locator and Long Text Responses to the PeopleSoft Student Administration Recruiting and Admissions transaction tables:

- A Job that automatically runs the existing TS189 People Search/Match/Post SQR first, followed by the new CRM Post File Attachments/Long Text application engine process.
- Use the delivered Process Definition that runs only the 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 8.9.

Task 13-9: Use the ADCRMPST Job Definition

To Use the Job Definition:

1. **For SA 8.0SP1**, select **Home, PeopleTools, Process Scheduler Manager, Use, Job Definitions**.

   For SA 8.9, select **Home, PeopleTools, Process Scheduler, Jobs**.

2. Enter the Process Job = 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, it is recommended that the Process Groups for the old EDI TS189 People Search/Match/Post (ADAPPPST) be deleted.

To Use the Process Definition:

1. **For SA 8.0SP1**, select **Home, PeopleTools, Process Scheduler Manager, Use, Job Definitions**.

   For SA 8.9, select **Home, People Tools, Process Scheduler, Jobs**.

2. Enter the Process Job = SAD_CRM_SYN2.
3. Select the Process Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

Note. This concludes setup tasks for installation on the PeopleSoft Student Administration side.

Task 13-10: Run OLM_CS_SETUP.dms

Note. This is the first task for installation on the PeopleSoft Customer Relationship Management side.

A data mover script is designed for automated setup. The dms will:

- Register the Application Class for the audience based on a user's security profile.
- Set up the Numbering Schemas for the SetID used for the EIPs.
- Activate EIP's Channels, Messages, Nodes and Node Transactions.
- Define SETID from SHARE to PSUSI for inbound EIP data.
- Define Security Settings for the Person Basic Fullsync for EIP.
- Set the Record Prefix from OLM to CS for Profiles.

Verify the following Message Channels are activated:

- ❑ PERSON_DATA
- ❑ SAD_CRM_DATA
- ❑ SAD_CRM_SETUP

And their Corresponding Messages

- ❑ PERSON_DATA
    - o PERSON_BASIC_FULLSYNC
    - o PERSON_BASIC_SYNC
- ❑ SAD_CRM_DATA
    - o CS_ADM_APPL_DATA_FULLSYNC
    - o CS_ADM_PRSPCT_DATA_FULLSYNC
    - o CS_APPL_BIO_SYNC
    - o CS_EMAIL_NOTICE
    - o CS_PERS_DATA_EXTEND_FULLSYNC
    - o CS_PERSON_BASIC_FULLSYNC
    - o CS_SCRTY_APPL_CTR_FULLSYNC
    - o CS_SCRTY_RECR_CTR_FULLSYNC
    - o CS_STUDENT_BOID_SYNC
    - o CS_T189_ADM_APPL_SYNC
    - o CS_TEST_SCORES_FULLSYNC

- SAD_CRM_SETUP
    - CS_PRFL_ATTR_CHOICES_FULLSYNC
    - CS_STUDENT_TOPIC_SYNC

For CRM89/SA89 Integration, SA89 will be publishing PERSON_BASIC_SYNC (incremental sync) during Online Student Components Process. In addition SA89 will be publishing PERSON_BASIC_FULLSYNC (full sync) in lieu of CS_PERSON_BASIC_FULLSYNC.

To Run the Set Up Data Mover Script OLM_CS_SETUP.dms:

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 Data Mover Directories to ps_home\data (e.g. 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 **OLM_CS_SETUP.dms** from ps_home\scripts in PeopleSoft Data Mover.
9. Select **File, Run Script.**
10. Recycle the AppServer and clear the AppServer cache.
11. Recycle the PIA server.

Task 13-11: Set Up and Test the EIP Configuration in the CRM database

To Set Up the JOLT Connect String for Application Servers:

Add these properties in PS_HOME\ webserv\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 (8.45 for CRM 8.9)

CRMNODENAME is the CRM default local node name (e.g. C890P24).

To Verify the Local Gateway Properties:

1. Select **PeopleTools, Integration Broker, Configuration, Gateways.**
2. Search for the Integration Gateway ID.

   URL format: http://*CRM machinename:port*/PSIGW/PeopleSoftListeningConnector

Note. Local Gateway properties are set up during CRM 8.9 installation.

To Set Up the SA External Node and Connector:

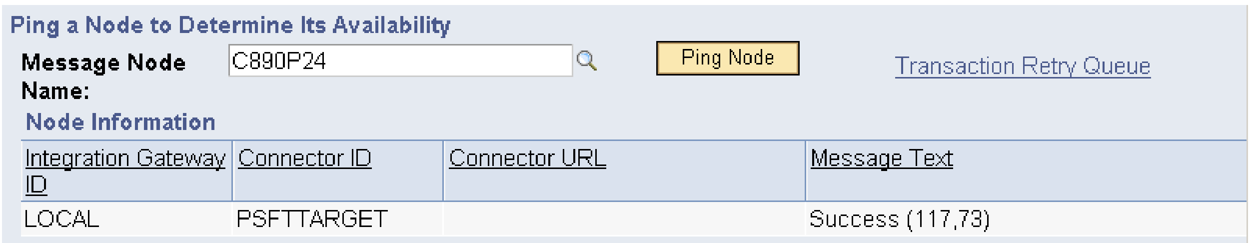
1. Select **PeopleTools, Integration Broker, Integration Setup, Node Definitions**.
2. Search for the node SA_CRM.
3. Rename it to the SA's node name, which is defined as default local node in the SA database (e.g. H890P24 for SA8.9 or SA801CR2 for SA8.0SP1).
4. Click Save.
5. Select the Connectors tab, and set the URL value to SA's local gateway.

   URL format is http:// *SA_machinename:port*/servlets/gateway.
6. Select the Transactions tab.
7. Click Edit for each transaction and change the status from Inactive to Active.

Note. Instead of renaming the SA_CRM node, you can either create a new node or use an existing node and copy the transactions from the delivered SA_CRM node to their SA node. In addition, you must define a new relationship for the SA node to facilitate the transformation of the OA message CS_APPL_BIO_SYNC to CS_T189_ADM_APPL_SYNC. You can access the delivered relationship CS_T189_ADM_OUT by selecting **PeopleTools, Integration Broker, Relationships**.

To Test (Ping) the CRM Default Local Node:

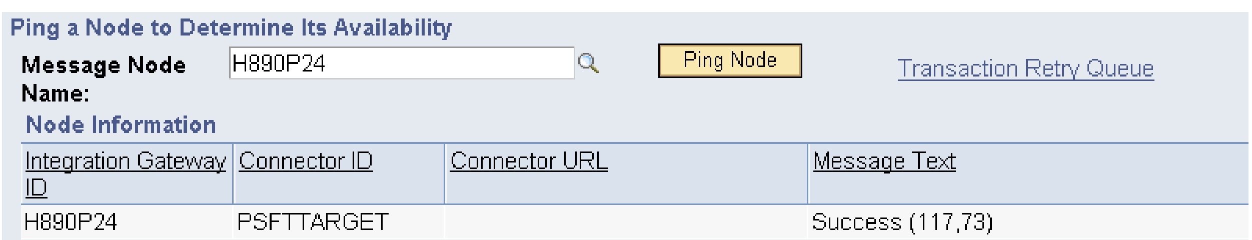
1. Select **PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.**
2. Select the Node Status tab.
3. Select the CRM default local node (e.g., C890P24).
4. Click the Ping Node button. Verify that “Success” appears in the Message Text column.



Node Status page

To Test (Ping) the SA Node (For SA89):

1. Select **PeopleTools, Integration Broker, Monitor Integrations, Monitor Message**.
2. Select the Node Status tab.
3. Select the SA Node, which is defined as the default local node in the SA database. (H890P24)
4. Click the Ping Node button and verify that “ Success” appears in the Message Text column:



Node Status page for SA8.9

To Test (Ping) the SA Node (For SA8.0SP1):

1. Select **PeopleTools, Integration Broker, Monitor Integrations, Monitor Message**.

2. Select the Node Status tab.

3. Select the SA Node, which is defined as the default local node in the SA database. (e.g., SA801CR2)

4. Click the Ping Node button and verify that " Success" appears in the Message Text column:

Ping a Node to Determine Its Availability

Message Node Name: SA801CR2   Ping Node   Transactio

Node Information

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFT81TARGET	http://ADNTAS50:8080/servlets/gateway	Success (117,73)

Node Status page for SA 8.0SP1

For both CRM8.9/SA8.9 and CRM8.9/SA8.0SP1 integration verify the following message transactions have been added to their respective node

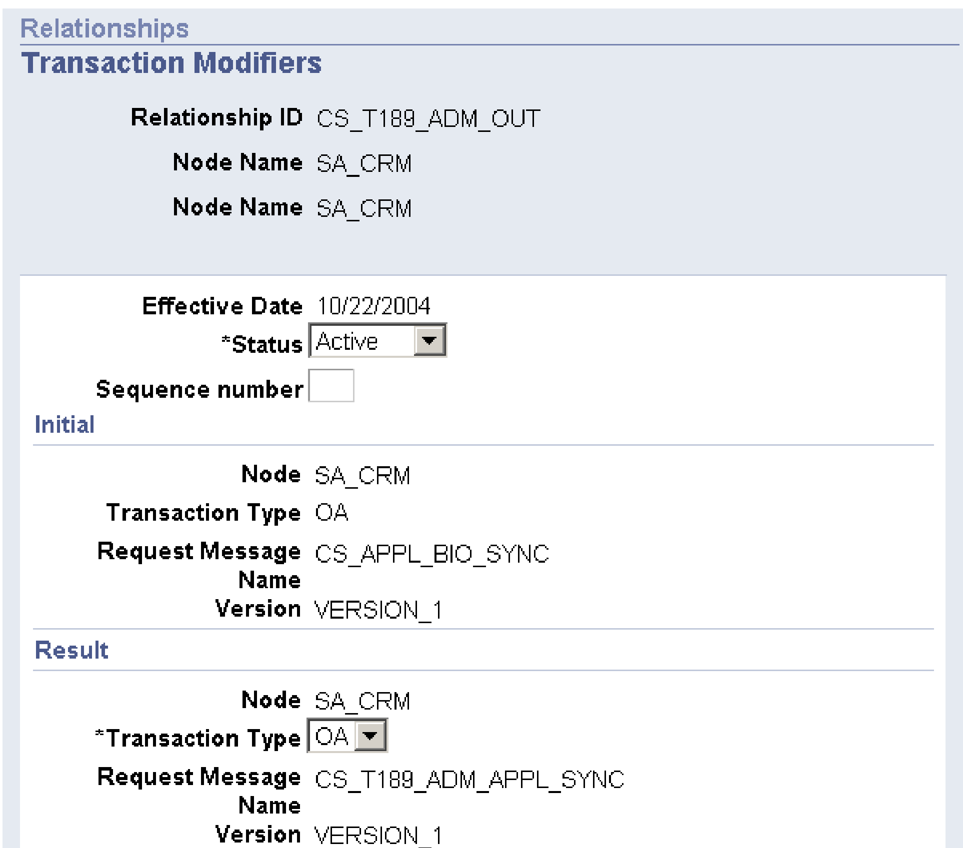
Transactions   Customize | Find | First 1-15 of 15 Last

		Transaction Type	Request Message	Request Message Version	Effective Date	Status
1	Edit	InAsync	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	10/18/2004	Active
2	Edit	InAsync	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	10/18/2004	Active
3	Edit	OutAsync	CS_APPL_BIO_SYNC	VERSION_1	10/18/2004	Active
4	Edit	OutAsync	CS_EMAIL_NOTICE	VERSION_1	10/18/2004	Active
5	Edit	InAsync	CS_PERSON_BASIC_FULLSYNC	VERSION_1	10/18/2004	Active
6	Edit	InAsync	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	10/18/2004	Active
7	Edit	InAsync	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	10/18/2004	Active
8	Edit	InAsync	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	10/18/2004	Active
9	Edit	InAsync	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	10/18/2004	Active
10	Edit	InAsync	CS_STUDENT_BOID_SYNC	VERSION_1	11/17/2004	Active
11	Edit	OutAsync	CS_STUDENT_TOPIC_SYNC	VERSION_1	10/27/2004	Active
12	Edit	OutAsync	CS_T189_ADM_APPL_SYNC	VERSION_1	11/17/2004	Active
13	Edit	InAsync	CS_TEST_SCORES_FULLSYNC	VERSION_1	10/18/2004	Active
14	Edit	InAsync	PERSON_BASIC_FULLSYNC	VERSION_1	12/14/2005	Active
15	Edit	InAsync	PERSON_BASIC_SYNC	VERSION_1	12/14/2005	Active

Request Message	Request Message Version	Transaction Type
CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	inAsync
CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	inAsync
CS_APPL_BIO_SYNC	VERSION_1	outAsync
CS_EMAIL_NOTICE	VERSION_1	outAsync
CS_PERSON_BASIC_FULLSYNC (used only for CRM8.9/SA8.0SP1)	VERSION_1	inAsync
CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	inAsync
CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	inAsync
CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	inAsync
CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	inAsync
CS_STUDENT_BOID_SYNC	VERSION_1	inAsync
CS_STUDENT_TOPIC_SYNC	VERSION_1	outAsync
CS_T189_ADM_APPL_SYNC	VERSION_1	outAsync
CS_TEST_SCORES_FULLSYNC	VERSION_1	inAsync
PERSON_BASIC_SYNC	VERSION_3	inAsync
PERSON_BASIC_FULLSYNC (Used only for CRM8.9/SA8.9)	VERSION_1	inAsync

Furthermore, verify the Transformation Relationship has been established.


Relationships
Transaction Modifiers
Relationship ID CS_T189_ADM_OUT
Details
*Description CS_189_ADM_OUT
*Relationship Status Active
Node
*Node Name SA_CRM
Properties Contact
Node
*Node Name SA_CRM
Properties Contact
Comment Transform CS_APPL_BIO_SYNC out to CS_T189_ADM_APPL_SYNC

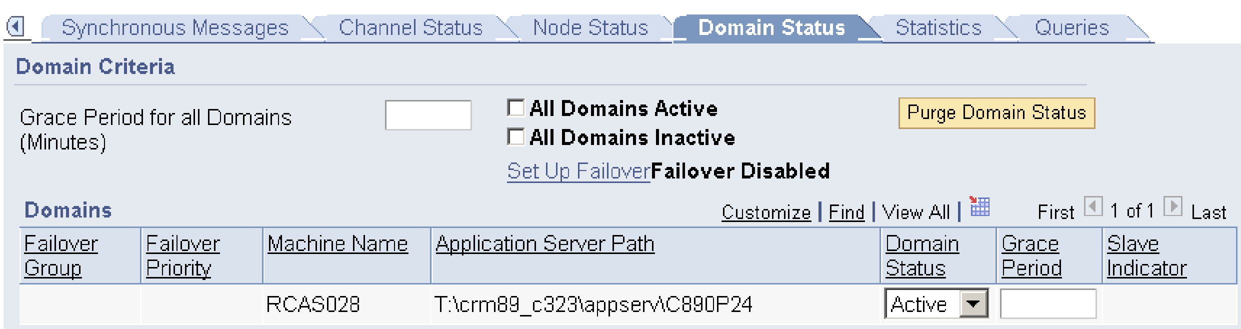

Relationships
Transaction Modifiers
Relationship ID CS_T189_ADM_OUT
Node Name SA_CRM
Node Name SA_CRM
Effective Date 10/22/2004
*Status Active
Sequence number
Initial
Node SA_CRM
Transaction Type OA
Request Message Name CS_APPL_BIO_SYNC
Version VERSION_1
Result
Node SA_CRM
*Transaction Type OA
Request Message Name CS_T189_ADM_APPL_SYNC
Version VERSION_1

To Activate the Domain:

1. Select **PeopleTools, Integration Broker, Monitor, Monitor Message**.

2. Select the Domain Status tab.

3. In the Domains grid, make sure the Domain Status of the machine of gateway is Active. (If it is not, change it to Active, click the Update button, and refresh.)

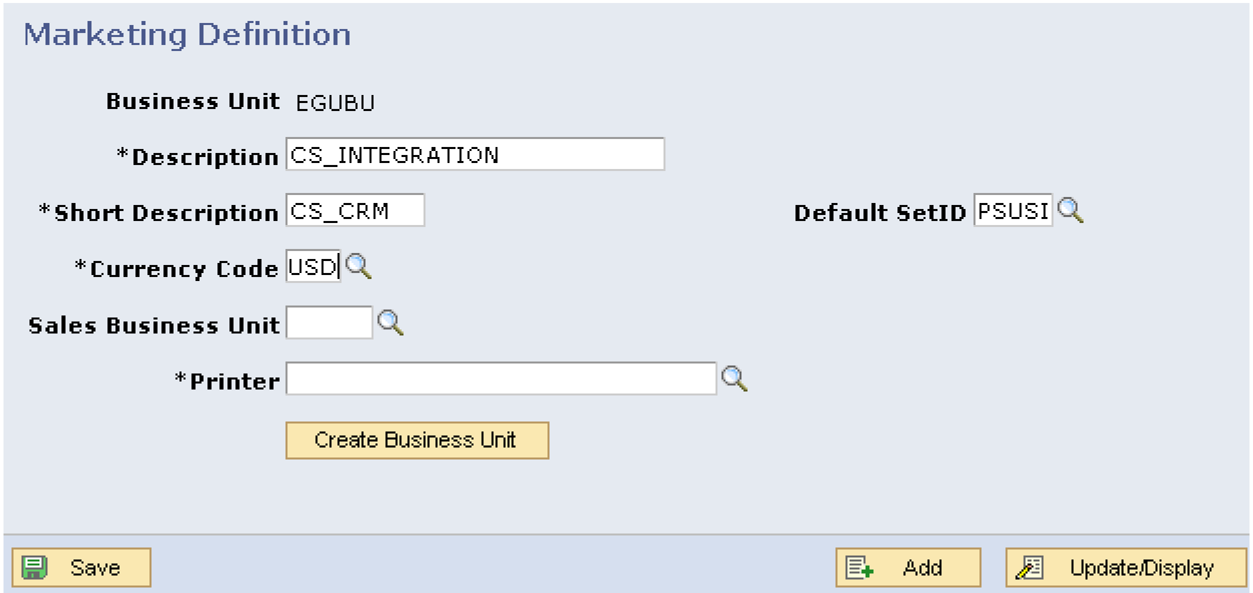


Task 13-12: Define the Business Unit (EGUBU) for the CRM Database

To Define the Business Unit for Marketing:

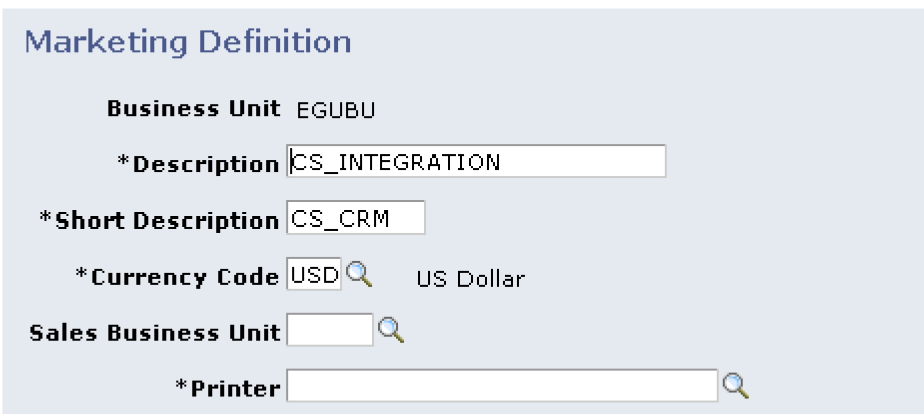
1. Select **Set Up CRM, Business Unit Related, Marketing Definition**.

2. Create the Business Unit EGUBU as shown in the figure:



Marketing Definition page

3. Click the Create Business Unit button.



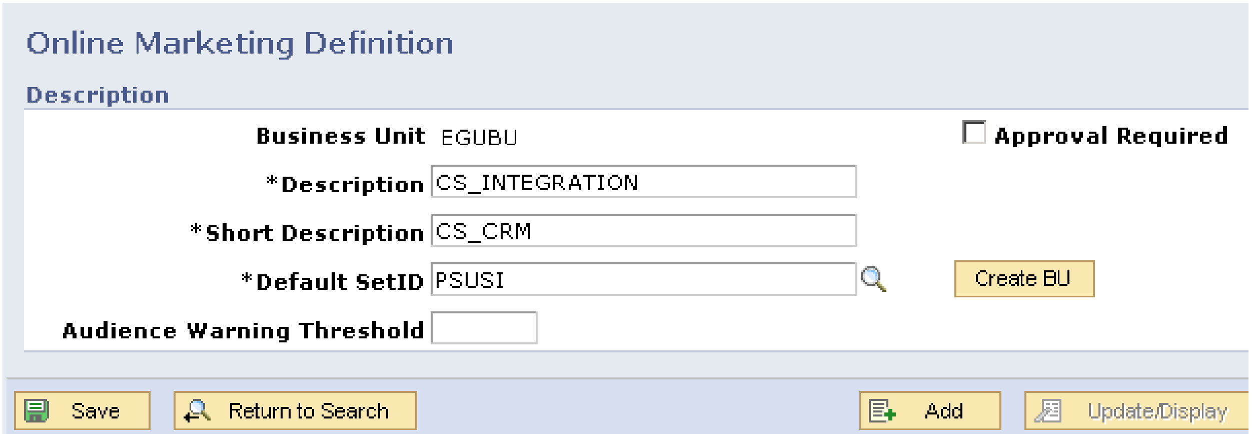
Marketing Definition page

4. Click Save.

To Define the Business Unit for Online Marketing:

1. Select **Set Up CRM, Business Unit Related, Online Marketing Definition.**

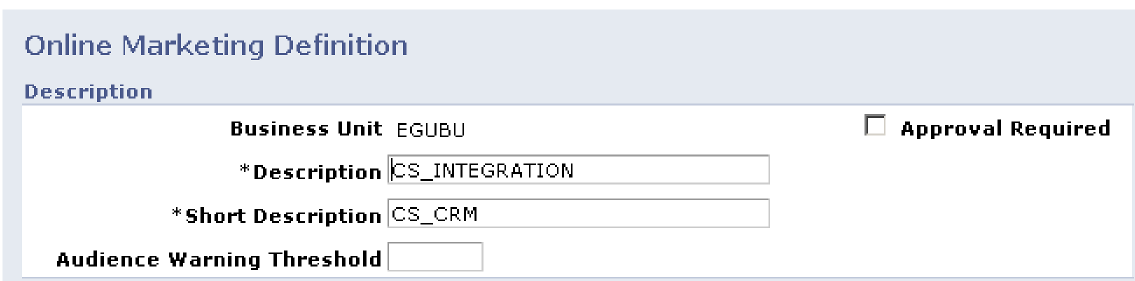
2. Search for and open the Business Unit, EGUBU, as shown in the figure:



Online Marketing Definition page

3. Click the Create BU button.

   The Online Marketing Definition page create page appears.



Online Marketing Definition page

4. Click Save.

Task 13-13: Run Data Mover Scripts to Import Sample Data into the CRM Database

The sample Dialog, Audience, Mailbox, and Web template data are delivered by the set of dms/dat files located in *PS_HOME*/data and *PS_HOME*/scripts directories. Use PeopleSoft Configuration Manager to set up the Data Mover Input Directory to path, if needed.

To Run Data Mover Scripts to Import Sample Data:

1. Select **Set Up CRM, Common Definitions, Profile Management, Profile Definitions**.

2. Verify that the Student Administration profiles are present in the Individuals group.

   Their names are prefaced by “CS”, for example, CS-ADM Academic History.

If no CS profiles are present, run the profile data mover script **import_ profile_master.dms** by running the file in *$PS_HOME*\scripts using PeopleSoft Data Mover.

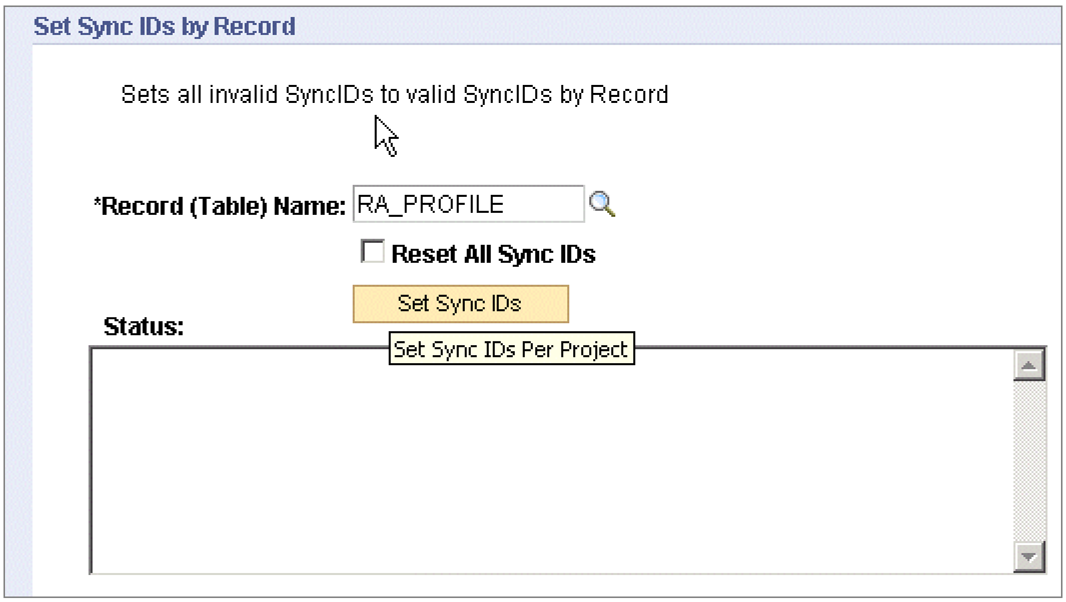
3. Reset all of the SYNCIDs for the imported profiles:

    a) Select **PeopleTools, Utilities, Administration, Set Sync IDs.**

    b) In the Record (Table) Name field, enter *RA_PROFILE.*

    c) IMPORTANT: Verify that the check box for Reset All Sync IDs is **not** selected.

    d) Click the Set Sync IDs button.



Set Sync IDs by Record window

    e) Repeat steps b-d, entering *RA_ATTRIBUTE* in the Record Name field.

    f) Repeat steps b-d, entering *RA_ ATTR_CHOICES* in the Record Name field.

4. Using PeopleSoft Data Mover, run the script **reset_profile_master.dms** in *$PS_HOME*/scripts to synchronize the runtime- and definition-side profiles.

5. Using Data Mover, run the dialog-related scripts in this order:

    a) import_mailbox_template.dms

    b) import_extension_template.dms

    c) import_audience_template.dms

    d) set_target_last_auto_nbr.dms

e) import_dialog_master.dms

f) import_layout_template.dms

Task 13-14: Set Up the Web Template's URL to a Valid Template File Location in the CRM database

To Set Up the Web Template's URL to a Valid Template File Location:

1. Select **Set Up CRM, Product Related, Online Marketing, Template Setup**.

2. Search for and change the template CS_GLAKE_UGRD's URL value to DES:

   URL format: http://<*DES Server:port*>/DCS/Sample/SA/templates/GLAKE_Undergrad.html

Task 13-15: Establish Valid Mailbox Email Addresses

To Establish Valid Mailbox Email Addresses:

1. Select **Set Up CRM, Product Related, Online Marketing, Mailbox Setup**.

2. Assign valid email addresses to the mailboxes below:

120105	Normal	from@changeme.com
120106	Bounced	bounce@changeme.com
120118	Normal	reply@changeme.com

MailBox Setup Search page

Task 13-16: Set Up CS Communication Sync page Permissions in the CRM database

To Add the CS Communication Sync Page to the ALLPAGES Permission List:

1. Select **PeopleTools, Security, Permission & Roles, Permission Lists.**

2. Search for ALLPAGES, go to Page tab, and click the Add (+) button.

3. Enter CS_INTEGRATION in the Menu Name column.

4. Click Save.

Permission Lists: Pages page

5. Click the Edit Components link for the CS_INTEGRATION menu.

6. Click the Edit Pages button for the CS_RUN_DLG_EMAIL component.

7. Click the Select All button.

8. Click OK .

9. Click Save.

To Run the Portal Security Sync Process:

1. Select **PeopleTools, Portal, Portal Security Sync.**

2. Click the Add a New Value button.

3. Enter a Run Control ID (e.g. UPD_PERM).

4. Click Add.

5. Click the Run button on the Process Security Synchronization page.

6. Select a Process Scheduler Server name and click OK.

7. Wait for the process to be completed. Check the message log using the Process Monitor to make sure that the Process PORTAL_CSS ran successfully.

Task 13-17: Set Up the Full Data Publish Rule for Topic IDs (Dialog Questions) in the CRM Database

To Set Up the Full Data Publish Rule:

1. Select **Enterprise Components, Integration Definitions, Full Data Publish Rules**.
2. Search for the message, CS_STUDENT_TOPIC_SYNC.
3. Enter a Publish Rule ID (e.g. STUDENT_TOPIC) and Description (e.g. Publish Student Topic).
4. Set the Status to Active.
5. Click Save.

Task 13-18: Set Up the FTP Server for the PeopleSoft SA Database

When the applicant uploads a file attachment to the CRM System, it is stored on a FTP server that is defined in the CRM system. The (student-side) CRM Post File Attachment/Long Text Application Engine process will get the address of the CRM system's FTP server from the URL table and copy that file to an SA system FTP server, which also must be defined in the URL table.

To Define the CRM FTP Server:

1. Select **Home, PeopleTools, Utilities, Use, URL Maintenance**.
2. Click Add a New Value.
3. Specify the URL Identifier, for example, CRM_SERVER (it can be any value).
4. Click Add.
5. Enter the Description as CRM FTP Server.
6. Enter the URL of the FTP server, for example: ftp://user2:pword2@ftp.crmserver.com/files/ .

To Define the Student FTP Server:

1. Select **Home, PeopleTools, Utilities, Use, URL Maintenance**.
2. Select Add a New Value.
3. Specify the URL Identifier as SA_SERVER (it can be any value).
4. Click Add.

5. Enter the Description as SA FTP Server.

6. Enter the URL as ftp://user2:pword2@ftp.saserver.com/files/ (*This is an example of a valid ftp address, the actual value depends on the ftp address/login information of the "Student-side" FTP server).

To Define New URL IDs on the Application Center Table:

The next step is to define new URL IDs in the Application Center table. We've added two new fields to the Application Center table that identify the CRM FTP Server URL ID and the SA FTP Server URL ID. This step should be repeated for each Application Center that is loaded on the CRM system side.

1. **For SA 8.0SP1**, select **Home Design Student Administration, Design Admissions, Setup, Application Center Table**.

   For SA 8.9, select **Main Menu, Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table.**

2. Enter the Application Center as UGRD. (This is just an example of an Application Center; this value is dependent on the user's setup data, and the application centers that are being used by the applications that are loaded via the CRM system.)

3. Enter Student FTP Server ID as SA_SERVER (or whichever URL_ID was created in the URL table for the Student-side server).

4. Enter CRM FTP Server ID as CRM_SERVER (or whichever URL_ID was created in the URL table for the CRM-side server).

Task 13-19: Populate Profile Attribute Choices from SA to CRM

To Run Setup Messages in the SA Database:

1. **For SA 8.0SP1**, select **Home, Define Business Rules, Manage Integration Rules, Process, Full Data Publish**.

   For SA 8.9, select **Main Menu, 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 the Message Name, CS_PRFL_ATTR_CHOICES_FULLSYNC.

Task 13-20: Clean Up and Reset Profile-Related Data Integrity in the CRM Database

After populating the profile attribute choices from SA to CRM, data integrity must be confirmed.

To Run Cleanup Scripts:

1. Open file **reset-ids.dms** from PeopleSoft Data Mover.
2. Select **File, Run Script**.
3. Recycle the DES.

Task 13-21: Activate CRM Profiles in the CRM Database

To Activate CRM Profiles:

1. Select **Set Up CRM, Common Definitions, Profile Registration.**
2. Activate these profiles:
   - CS-Appl Biographic
   - CS-Appl Academic
   - CS-Appl Academic History
   - CS-Appl Employment
   - CS-Appl Honors Awards Extra Curr
   - CS-Appl Parents Emerg Contact
   - CS-ADM Applicant Data
   - CS-PRS Prospect Career
   - CS-Person
   - CS-PRS Prospect Plan
   - CS-PRS Prospect Program
   - CS-PRS Prospect Sub-Plan
   - CS-PRS Prospect Recruiters
   - CS-ADM Applicant Program
   - CS-ADM Applicant Plan
   - CS-ADM Applicant Sub-Plan
   - CS-Appl Academic Documents
   - CS-ADM Academic History

- CS-ADM Academic Interests
- CS-ADM Applicant Recruiter
- CS-ADM Extracur Activity
- CS-ADM Service Indicators
- CS-ADM Test Results

Task 13-22: Populate Student Data from PeopleSoft SA to PeopleSoft CRM

To Create Run Control for Student Data:

1. **For SA 8.0SP1**, select **Define Business Rules, Manage Integration Rules, Process, Full Data Publish.**

   For SA 8.9, select **Main Menu, Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.**

2. Enter the Run Control ID, such as SAD_CRM_INTEGRATION.

3. **For SA 8.0SP1,** enter rows (using '+') with these values:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	CS_PERSON_BASIC_FULLSYNC.

4. **For both SA 8.0SP1 and SA 8.9,** enter rows (using '+') with these values:

Request ID	Description	Process Frequency	Message Name
002	Extend Pers Data	Once	CS_PERS_DATA_EXTEND_FULLSYNC
003	Applicant Data	Once	CS_ADM_APPL_DATA_FULLSYNC
004	Prospect Data	Once	CS_ADM_PRSPCT_DATA_FULLSYNC
005	Test Score Data	Once	CS_TEST_SCORES_FULLSYNC
006	Application Center Security	Once	CS_SCRTY_APPL_CTR_FULLSYNC
007	Recruiting Center Security	Once	CS_SCRTY_RECR_CTR_FULLSYNC

5. Save the Run Control.

To Run the PeopleSoft SA to PeopleSoft CRM Full Sync Integration:

1. **For SA 8.0SP1**, select **Home, Design Student Administration, Manage CRM Integration, Process, Populate ID Control Table.**

   For SA 8.9, select **Main Menu, 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 entered on this page will be used to create a control list of EMPL IDs that will be integrated with PeopleSoft CRM. Only Applicants and Prospects created on or after the dates specified will be considered for integration with PeopleSoft CRM. In addition, only test scores loaded on or after the test score as of date will be loaded into PeopleSoft CRM.

To Monitor Messages:

After the above process has been run and the control table is loaded, the FULLSYNC messages will be published to the CRM node. The messages can be monitored from the Message Monitor.

1. **For SA 8.0SP1**, select **Home, PeopleTools, Application Message Monitor, Use, Application Message Monitor.**

   For SA 8.9, select **Home, People Tools, Integration Broker, Monitor Integrations, Monitor Message.**

2. From the Publish Contracts Tab, the following messages can be monitored using the 'Details' hyperlink next to each of the following messages:

   - CS_PERSON_BASIC_FULLSYNC **(SA 8.0SP1 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

To Run the TS189 Processes to Post Data:

Once the data has been loaded into the TS189 Staging tables, via the Application Messages from the PeopleSoft CRM system, it must be run through the existing TS189 Org Search, TS189 People Search/Match/Post, and CRM Post File Attachments/Long Text Responses.

1. **For SA 8.0SP1**, select **Home, Develop Enrollment, Process External Data, Proc E-F, EDI TS189 Org Search**.

   For SA 8.9, select **Main Menu, Student Admissions, Application/Transcript Loads, TS189, 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 **SA 8.0SP1**, select **Home, Develop Enrollment, Process External Data, Proc E-F, EDI TS189 People Search/Post.**

   For **SA 8.9**, select **Main Menu, Student Admissions, Application/Transcript Loads, Ts189, 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 the security to enable the Job Definition or the Process Definition, select the process/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's run as an individual process or as the Job.

Task 13-23: Post Dialog Questions from PeopleSoft CRM to SA in the CRM Database (Optional)

Note. This process is optional, and it can be run as often as needed.

To Post a Current Active Dialog Topic to SA:

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. Select the 'Run' Tab and select EOP_PUBLISHT, Table Replication Publish.
5. Save and Run.
6. Verify the process from the Process Scheduler Monitor and Message Monitor.

