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Getting Started on PeopleSoft Installation

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Getting Started on
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Contents

Preface

About This Documentation.....v

Understanding This Documentation.....v

Typographical Conventions.....v

Products.....vi

Comments and Suggestions.....vii

Chapter 1

Reviewing the PeopleSoft Architecture.....1

Introducing the Installation Process.....1

Reviewing PeopleSoft Pure Internet Architecture.....2

Reviewing PeopleSoft Components.....2

Chapter 2

Planning Your PeopleSoft Installation.....7

Understanding Planning and Research.....7

Researching Product Information.....7

Researching Support Information.....8

Determining the PeopleSoft PeopleTools Release Level.....8

Reviewing PeopleSoft Certifications.....8

Reviewing Maintenance Information.....9

Assembling Your Installation Team.....9

Chapter 3

Installing the Software.....13

Obtaining Installation Files.....13

Assembling Installation Documentation.....13

Reviewing PeopleSoft PeopleTools Utilities.....14

Starting the Installation.....15

Index.....21

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About This Documentation

This preface discusses:

- Understanding This Documentation
- Typographical Conventions
- Products
- Comments and Suggestions

Understanding This Documentation

This documentation contains information to help you in planning and preparing for a basic PeopleSoft installation. It introduces some of the concepts used in the PeopleSoft installation, and directs you to the resources you need to study before beginning your installation. As a general introduction, it would probably be most useful for new users.

Typographical Conventions

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

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*. Italics are also used to indicate user-supplied information. For example, the term *domain* is used as a placeholder for the actual domain name in the user's environment. When two such placeholders are used together, they may be set apart with angle brackets. For example, the path <*PS_CFG_HOME*>/appserv/<*domain*> includes two placeholders that require user-supplied information.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.

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Convention	Description
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading *See Also* refer you to additional documentation that has more information regarding the subject.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
Note. Note text.	Text that begins with *Note.* indicates information that you should pay particular attention to as you work with your PeopleSoft system.
Important! Important note text.	A note that begins with *Important!* is crucial and includes information about what you need to do for the system to function properly.
Warning! Warning text.	A note that begins with *Warning!* contains critical configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these Oracle products and product families:

- Oracle® BPEL Process Manager
- Oracle® Enterprise Manager
- Oracle® Tuxedo
- Oracle® WebLogic Server
- Oracle’s PeopleSoft Application Designer
- Oracle’s PeopleSoft Change Assistant
- Oracle’s PeopleSoft Change Impact Analyzer
- Oracle’s PeopleSoft Data Mover
- Oracle’s PeopleSoft Process Scheduler
- Oracle’s PeopleSoft Pure Internet Architecture
- Oracle’s PeopleSoft Customer Relationship Management
- Oracle’s PeopleSoft Financial Management
- Oracle’s PeopleSoft Human Capital Management

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- Oracle's PeopleSoft Enterprise Learning Management
- Oracle's PeopleSoft Enterprise Pay/Bill Management
- Oracle's PeopleSoft PeopleTools
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Portal Solutions
- Oracle's PeopleSoft Staffing Front Office
- Oracle's PeopleSoft Supply Chain Management

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

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

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

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CHAPTER 1

Reviewing the PeopleSoft Architecture

This chapter discusses:

- Introducing the Installation Process
- Reviewing PeopleSoft Pure Internet Architecture
- Reviewing PeopleSoft Components

Introducing the Installation Process

Use this documentation as a starting point to plan your PeopleSoft installation. It may be especially helpful if you have never carried out any installation. This book introduces the PeopleSoft architecture and provides information on resources for researching and planning.

A PeopleSoft installation is a multi-step process that is designed to be applicable to a variety of situations and environments. To ensure a smooth and successful installation, use this book to help you with the decision-making and preparation that are needed to make your installation successful.

Planning and executing a PeopleSoft installation should include these tasks:

1. Choose the PeopleSoft products you want to install.

   Select your PeopleSoft applications and choose the release.

2. Determine the PeopleSoft PeopleTools release that supports the PeopleSoft applications.
3. Read the PeopleSoft PeopleTools and PeopleSoft applications hardware and software requirements guides for an overview of the necessary hardware and software.
4. Choose your configuration.

   Determine the database platform, web server software, operating systems, and so on.

5. Review PeopleSoft certification information.

   Use the PeopleSoft certification information on My Oracle Support to get detailed support information for the servers and operating systems you choose.

6. Procure the necessary resources, including supported third-party software and hardware and accompanying documentation.
7. Download Oracle software and documentation.
8. Use the PeopleSoft PeopleTools installation guide to install the PeopleSoft PeopleTools and PeopleSoft application software.
9. Use the PeopleSoft application installation guides to complete any application-specific tasks.

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10. Use PeopleSoft PeopleBooks and PeopleSoft online resources to guide you in setting up advanced configurations.

Reviewing PeopleSoft Pure Internet Architecture

The PeopleSoft Pure Internet Architecture is a server-centric execution architecture for deploying Internet applications to end users who access the applications through a web browser. These Internet applications are built using PeopleSoft PeopleTools.

PeopleSoft applications support numerous hardware and database choices. PeopleSoft servers run on the industry's leading hardware and software platforms. PeopleSoft applications look the same to application users, regardless of the database or hardware platform being used: mainframe, midrange, or PC workstation.

See Also

PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook, "Understanding PeopleSoft Pure Internet Architecture"

PeopleTools 8.52 Hardware and Software Requirements, "PeopleTools Architecture Overview and Support Definitions"

Reviewing PeopleSoft Components

It may be helpful to review briefly the components of the PeopleSoft system as you plan your installation. While this figure shows a single instance of each component, a production environment would likely be more complicated, and may have several databases, application servers, or web servers. The following figure is a simplified representation of the major components of a PeopleSoft installation, displaying the connections between the database server, application server, Process Scheduler, web server, and end user browsers.

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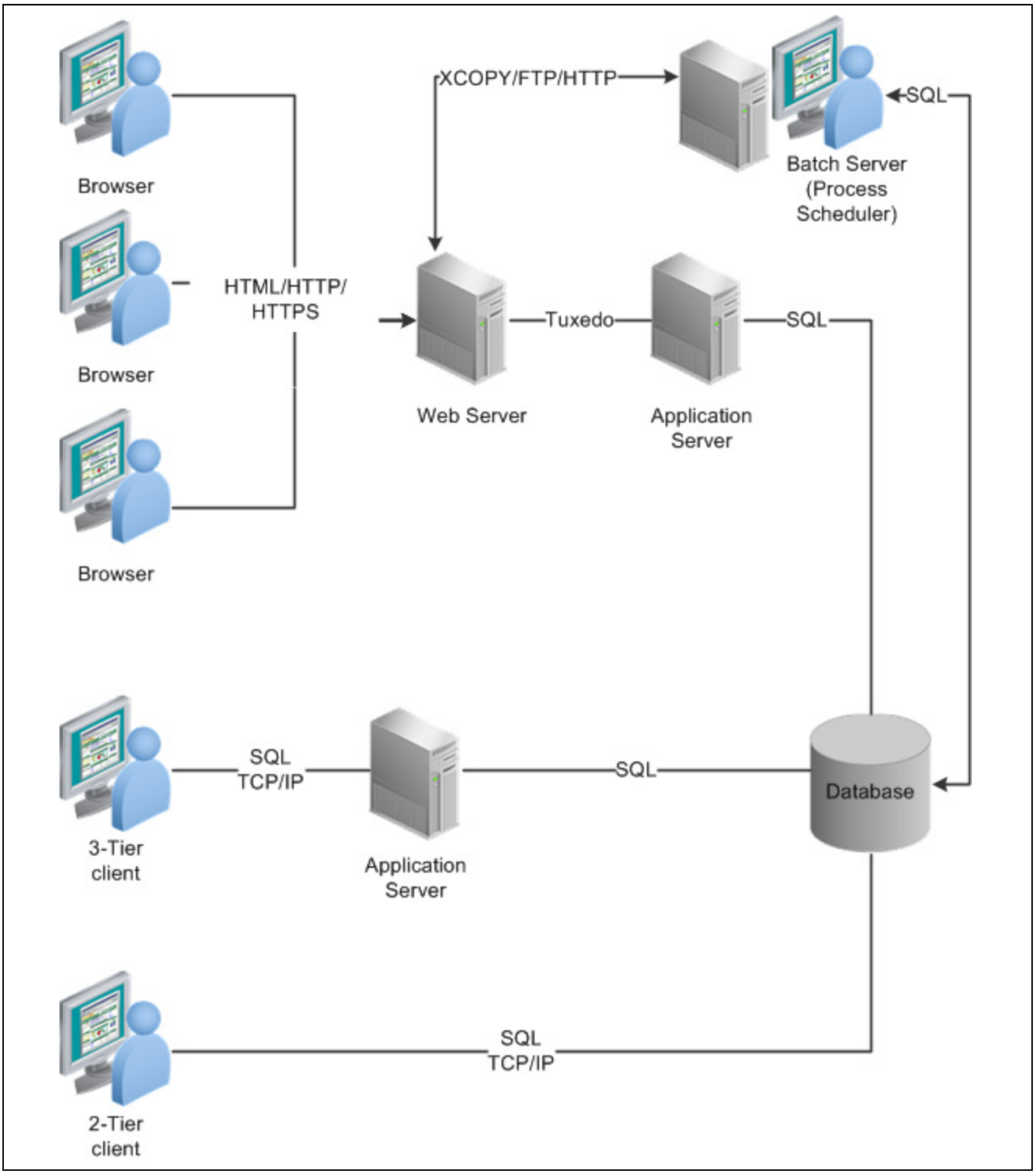

Basic PeopleSoft Architecture

The hardware and software you need to purchase, install, and test before installing your PeopleSoft application depends on the particular PeopleSoft configuration you choose. The components you need to consider include:

- *Database Server:* Your database server houses your PeopleSoft database. Before beginning the PeopleSoft installation, you should install the relational database management software (RDBMS) of your choice. There is a PeopleSoft PeopleTools installation guide for each of the six supported RDBMS platforms.

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Your PeopleSoft database needs sufficient disk space to accommodate your operating system, one production and one test copy of your database, and all log files—this is in addition to any disk space required for training or development databases. When you are upgrading to a new PeopleSoft release, you will also need space for two additional copies of your database. Keep in mind that database sizes vary depending on the application's use. Generally, a good practice is to initially oversize your storage media rather than undersize it.

- *File Server:* The file server is the environment (or file) repository for the PeopleTools Development Environment and for the files necessary to perform an upgrade. This includes PeopleSoft Change Assistant and all of the executables and scripts which are necessary to perform an upgrade. In addition, the file server is a source repository for COBOL and SQR. You will apply patches and updates from the My Oracle Support site directly to the file server and then copy the updated files to your other servers.

  Note. Because the PeopleSoft Installer lets you install files to the designated server—whether it is an application server, batch server, database server, web server, and so on—the file server is not used to transfer the entire contents of your PeopleSoft software files to a file server, as it was in earlier releases, and you will not need to use the PeopleSoft Server Transfer program to transfer files from your file server to the desired server. *This does not hold true for the DB2 UDB for z/OS platform,* which still requires a Microsoft Windows file server and uses Server Transfer.

- *Application Server:* The PeopleSoft Internet Application Server consists of the web server and the application server. The application server is designed to improve performance over a wide area network (WAN) as well as to permit communication between the end user workstation (through the web server) and the database. You can run an application server on Microsoft Windows or certain UNIX or Linux platforms. It needs ample disk space for Oracle Tuxedo, PeopleSoft application server files, COBOL, SQR, and database connectivity. Your application server should be a powerful machine with as much memory as possible to ensure optimum performance.

  See "Server Requirements," Defining Application Server Requirements.

  The PeopleSoft application server uses Oracle Tuxedo middleware product, which is designed to enable distributed application computing. Oracle Tuxedo is packaged with Jolt, which acts as the communications layer between the web server and the application server. The application server interprets Jolt messages coming from the web server into SQL, which it sends to the database server. Thus, SQL always takes place between the application server and the database server in a high-speed local area network (LAN), avoiding costly transmissions across WANs or lower bandwidth Internet connections.

- *Web Server:* A web server is required for the PeopleSoft Pure Internet Architecture. It serves as the link between the end user's workstation and the application server, with which it communicates through Oracle Jolt.

  Note. You can set up your web server and application server on the same machine. You also have the flexibility of setting up a web server on a machine of its own, with the application server on a separate machine.

- *Batch Server:* Your batch server runs your PeopleSoft batch processes. The term *batch server* is equivalent to the term *Process Scheduler* server. PeopleSoft batch processes, such as COBOL and SQR, are scheduled and invoked by a Process Scheduler server. The batch server maintains connectivity to the database.

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Note. COBOL is not needed for PeopleSoft PeopleTools or for applications that contain no COBOL programs. If your application contains COBOL programs, you need to purchase a Micro Focus COBOL compiler for Windows, UNIX, or Linux platforms, an IBM COBOL compiler for AIX, Microsoft Windows, or an IBM Enterprise COBOL for z/OS and OS/390 compiler for z/OS platforms.

See "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the Micro Focus COBOL Compiler" and "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the IBM COBOL Compiler" on My Oracle Support.

- *PeopleTools Development Environment:* The traditional Microsoft Windows-based client is still available, but is now used primarily as an environment for developers or system administrators. This Microsoft Windows-based machine provides traditional two-tier and three-tier connectivity to PeopleSoft applications.
- *Two-tier access:* The client accesses the database directly.

  In the two-tier architecture, application logic executes on the client machine using data it receives from the PeopleSoft database located on a separate relational database management system (RDBMS) server. The client/server network conversation uses SQL to transmit database calls.
- *Three-tier access:* The client uses the application server to manage the connection to the database.

  In a three-tier configuration, the application processing logic runs on the application server. In this case, RDBMS connectivity is no longer required on the client. The client uses Oracle Tuxedo to send messages to the application server, which, in turn, sends the appropriate SQL to the database server.

Note. You control the establishment of a two-tier or three-tier connection by your choice of login credentials. The installation guides specify which user name and password to use for each type of access. In addition to two-tier and three-tier access, you can access the database using SQL tools that are specific to your RDBMS platform.

- *End User Workstation:* You need a computer for each employee in your company who will use PeopleSoft applications. Because of the PeopleSoft Pure Internet Architecture, the end user's machine just needs any PeopleSoft-supported web browser. It doesn't have to have database connectivity or any PeopleSoft software.

  Under the PeopleSoft Pure Internet Architecture, the browser communicates with the web server via HTTP. The web server translates the request and communicates with the application server with Jolt. The application server interprets these messages and sends SQL to the database server.
- *Auxiliary Hardware/Software:* You may need extra hardware and software for optional PeopleSoft functionality or to support the application you are running.
- *Laser Printer Driver (Optional):* If you want to print SQR reports that use HP/PCL initialization strings, you will need a Windows printer driver for your laser printer that produces 180-character-wide reports using the HP LinePrinter font. Your printer must be configured with sufficient memory to produce graphics images for panel printouts.

Note. The various servers identified above (application, web, and so on) are considered "logical" servers. Many can exist on the same machine, although each can also reside on its own machine in a "physical" configuration.

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CHAPTER 2

Planning Your PeopleSoft Installation

This chapter discusses:

- Understanding Planning and Research
- Researching Product Information
- Researching Support Information
- Assembling Your Installation Team

Understanding Planning and Research

There are several online resources that you can take advantage of in researching PeopleSoft Enterprise products and planning your installation. The first two sections in this chapter list some of these resources. When you are ready to obtain the software and documentation for your installation, use the information in the last section in this chapter to find the necessary resources.

Researching Product Information

Begin the research for your installation by deciding which application products you will install. You should review and compare the release information to find the features that you want.

Use the following information on the Oracle web site to review and choose your PeopleSoft Enterprise application products:

- The PeopleSoft Enterprise product area gives an overview of the PeopleSoft applications.

  http://www.oracle.com/us/products/applications/peoplesoft-enterprise/index.htm

- The application unlimited policy discusses Oracle's support of PeopleSoft applications.

  http://www.oracle.com/us/products/applications/035482.htm

- PeopleSoft Enterprise Information Portal at URL http://www.oracle.com/us/products/applications/054275.html.

  The PeopleSoft Enterprise Information Portal assembles the documentation, training, and other resources to assist you in implementing PeopleSoft products. The page includes Information Solutions Sheets for PeopleSoft products that contain embedded hyperlinks to PeopleBooks, Documentation Updates, Instructor-Led and Online Courses, User Productivity Kit (UPK), Self-Study CD's, Certification Programs, and other helpful information.

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- The Release Notes for PeopleSoft PeopleTools and PeopleSoft applications describe the new features for a release.

  To find the release notes, search on My Oracle Support, or use the PeopleSoft Enterprise Information Portal.

- Release Value Propositions for PeopleSoft PeopleTools and PeopleSoft Applications.

  Access the Release Value Propositions from the PeopleSoft Enterprise Information Portal, or search on My Oracle Support

  Release Value Propositions provide an overview of the value proposition that is associated with the new features and enhancements that are planned for a PeopleSoft PeopleTools release. Use it to help you assess the business benefits of a PeopleSoft PeopleTools release and to plan your information technology (IT) projects and investments.

- Check the advisor webcast page on My Oracle Support (ID 548764.1) for web casts covering new features and enhancements.

- Benchmark performance reports for various PeopleSoft products at URL http://www.oracle.com/us/solutions/benchmark/apps-benchmark/peoplesoft-167486.html.

  PeopleSoft benchmarks demonstrate our software's performance characteristics for a range of processing volumes in a specific configuration. Customers and prospects can use this information to determine the software, hardware, and network configurations necessary to support their processing volumes.

Researching Support Information

This section discusses:

- Determining the PeopleSoft PeopleTools Release Level
- Reviewing PeopleSoft Certifications
- Reviewing Maintenance Information

Determining the PeopleSoft PeopleTools Release Level

After you decide which PeopleSoft application releases to install, you need to obtain detailed information on the supported PeopleSoft PeopleTools release, and supported hardware and software.

Search the Product Roadmap, under Certifications on My Oracle Support, to match your PeopleSoft Application release with the PeopleSoft PeopleTools release.

Search for the application release by year and quarter. On the Product Release Information page for PeopleSoft Application releases, in the Technology section, you can find the PeopleSoft PeopleTools release number that is associated with this application release.

Reviewing PeopleSoft Certifications

It is important that you verify that you have the correct hardware and software in place to support a successful installation. Use the hardware and software requirements guides on My Oracle Support to get an overview of the requirements for the PeopleSoft PeopleTools and PeopleSoft application releases you plan to install.

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For a more detailed, up-to-date resource, use the PeopleSoft certification information on My Oracle Support. Here you can find the most current support information on the hardware platforms, RDBMS versions, client connectivity versions, required compiler versions, and additional component versions. The certification information on My Oracle Support supersedes any information in the *PeopleTools 8.52 Hardware and Software Requirements.* Review the My Oracle Support article "Searching Using the Certifications Application" (article ID 747587.1) for an overview on using the Certification area for PeopleSoft installations.

See *PeopleTools 8.52 Hardware and Software Requirements,* "PeopleTools Architecture Overview and Support Definitions."

The Certifications are divided into categories. Note that you may need look in several categories to get the information for all of the components for your environment. Be sure to view the Certification Notes for each item. For example, connectivity clients such as Oracle Database Client or IBM DB2 Connect are in the category Desktop Applications, Browsers and Clients, and the Certification Notes include table describing the support for PeopleSoft Application Server, Batch Servers, and the PeopleTools Client.

You can also find links to information on patches required for installation in the certification notes. You should read the version of the document "Operating System, RDBMS & Additional Component Patches Required for Installation PeopleTools" that is appropriate for your database platform and other configuration.

See "Operating System, RDBMS & Additional Component Patches Required for Installation PeopleTools," My Oracle Support, (search for the article name).

Reviewing Maintenance Information

You can search for and download the necessary patches and updates for your PeopleSoft installation from the Patches & Updates tab on My Oracle Support.

See *PeopleTools 8.52 Installation for <your database platform>,* "Preparing for Installation," Reviewing Updates and Fixes Required at Installation.

To prepare for upcoming bundles and maintenance packs, use the maintenance schedules on My Oracle Support. The schedules include information on application bundles and PeopleSoft PeopleTools fixes by quarter, product line, and individual products.

See *PeopleTools 8.52 Installation for <your database platform>,* "Preparing for Installation," Considering Project Planning.

Assembling Your Installation Team

When planning your PeopleSoft installation, you may require contributors with a variety of skills, experience, and time commitments. The contributors may be fully or partly dedicated to the installation, permanent company members or hired as consultants expressly for the installation. In addition to the roles listed in this section, you may need additional resources depending upon your specific applications and the complexity of your particular environment.

Some of the key roles are listed below:

- Database administrator (DBA)

  The DBA's responsibilities may be on a part-time or on-call basis, but it is critical to have a DBA familiar with your database platform. The DBA may be responsible for the following tasks:

  - Review scripts and modify, if necessary, to comply with the standards of your environment.

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- Monitor database and provide database support.
- Perform backups and recoveries.
- Troubleshoot and tune database.
- Enforce standards.

- Network administrator

  The network administrator will provide network and server support. Similar to the DBA, this individual does not need to be assigned full-time. Your network administrator may be responsible for the following duties:

  - Manage network security and connectivity.
  - Troubleshoot network related issues.
  - Network configuration.

- System administrator/web administrator

  The system administrator should have working knowledge of the server operating system and PeopleSoft's technical architecture. The system administrator may need to be involved only on a part-time basis. The system administrator position is responsible for the following tasks:

  - Manage logins, passwords, and system security.
  - Troubleshoot server issues

- PeopleSoft installer

  You may want to hire a PeopleSoft installer. If you choose to self-install, consider having a PeopleSoft installer certify your install before starting the upgrade.

  Note. Many customers elect to use Oracle Consulting or other third-party consultants to assist them in various aspects of their upgrade process. The Oracle web site has more information on Oracle Consulting's upgrade services. See http://www.oracle.com/us/products/consulting/index.htm.

  Your PeopleSoft installer should fill the following roles:

  - Install Oracle-delivered software.
  - Create and install PeopleSoft Demo and Sys databases.
  - Configure the application server domains, web server, and Process Scheduler.
  - Complete and install the verification test.

- PeopleSoft administrator

  The PeopleSoft administrator should have a basic understanding of the PeopleSoft system, and should have the necessary skills to maintain and support the environment. In addition, the PeopleSoft administrator may need to act as a project manager in interacting with the other administrators and developers who work on the PeopleSoft system. PeopleSoft administrators should have a working knowledge of:

  - PeopleSoft system navigation
  - PeopleSoft windows, menus, and pages, and how to modify them
  - User accounts

    The PeopleSoft administrator should understand the various user account and roles that can be used to connect to the database.

  - Your RDBMS and operating system

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  - SQL and SQL command syntax
  - PeopleTools, including PeopleSoft Data Mover, PeopleSoft Change Assistant, PeopleCode, and Application Engine
  - Maintenance, updates, and patches
- Application developers

  Developers may require SQR, COBOL, PeopleTools, Application Engine, PeopleSoft Query, Crystal Reports, and PS/nVision experience, depending upon your customizations. Developers will fill the following roles:

  - Create and modify customizations to meet business needs.
  - Document all changes.

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CHAPTER 3

Installing the Software

This chapter discusses:

- Obtaining Installation Files
- Assembling Installation Documentation
- Reviewing PeopleSoft PeopleTools Utilities
- Starting the Installation

Obtaining Installation Files

Before beginning the installation, obtain the PeopleSoft installation software and documentation by downloading the necessary zip files from the Oracle Software Delivery Cloud web site. Use the Readme files to be sure that you obtain all the zip files required for your environment.

Note. The Oracle Software Delivery Cloud web site was formerly named Oracle E-Delivery. You may see both names throughout the documentation.

Several chapters in the PeopleSoft PeopleTools installation guides include sections on how to download specific files from Oracle Software Delivery Cloud. You may be able to skip these sections if your planning process has helped you to download all the files you need at the beginning of the installation process.

See Oracle Software Delivery Cloud, http://edelivery.oracle.com.

Assembling Installation Documentation

Before you begin your installation, you should have the following documentation ready for reference:

- Download the PeopleTools installation guide for your database platform.

  There are six installation guides for PeopleSoft PeopleTools, to correspond to the six supported RDBMS platforms: DB2 for z/OS, DB2 for Linux, UNIX, and Windows, Informix, Microsoft SQL Server, Oracle, and Sybase. The installation guides cover the steps needed for a basic installation. For advanced procedures, you are referred to PeopleSoft PeopleBooks.

  Be sure to read the chapter “Preparing for Installation” in the PeopleSoft PeopleTools installation guides to learn about specific requirements, such as connectivity software and user IDs, for the RDBMS (also sometimes referred to simply as database platforms) you use for your installation.

- Download the application-specific installation guides for your PeopleSoft application.

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You can download the installation guide for PeopleSoft PeopleTools and your PeopleSoft application, along with this getting started guide, when you download the installation software. You can also find the installation guides on My Oracle Support.

- Locate the database administration manuals provided by your RDBMS vendor.
- Use the *PeopleTools 8.52: Data Management PeopleBook* for administration information regarding using your RDBMS platform in a PeopleSoft installation.
- Locate the network administration manuals provided by your network vendor.
- Locate the installation and configuration manuals for additional software components used with the PeopleSoft installation, such as the web server software.

Reviewing PeopleSoft PeopleTools Utilities

The PeopleSoft PeopleTools installation includes several utilities that you use in setting up and administering PeopleSoft software. While there are several other tools included with PeopleSoft PeopleTools, the tools listed here are referred to during the installation process. These tools include:

- The *PeopleSoft installer* guides you through the process of installing files to the various servers.

  Depending upon your configuration, it can be used either as a Graphical User Interface (GUI) utility or a command-line executable.

- *Configuration Manager* is a GUI utility for configuring workstations being used as the PeopleTools Development Environment.

  When you use Configuration Manager to set up the workstation, it creates a Microsoft Windows program group with PeopleSoft PeopleTools utilities.

  Note. This Configuration Manager, which is included with PeopleSoft PeopleTools, should not be confused with the Oracle Configuration Manager, which is used to connect to My Oracle Support.

  See *PeopleTools 8.52 Installation for <your database platform>,* "Setting Up The Install Workstation."

  See *PeopleTools 8.52: PeopleSoft Change Assistant PeopleBook,* "Configuring and Running Environment Management Components."

- *Database Configuration Wizard (DCW)* is a GUI utility that guides you through the PeopleSoft database installation. Access the DCW executable from the PeopleSoft PeopleTools installation directory. The underlying mechanism for the DCW is Data Mover, which is described below.

  There are some installation configurations that cannot use the DCW for database setup. These cases are noted in the installation guides. In these cases, you must create the PeopleSoft database using the manual method. Manual database creation was used in early PeopleSoft releases, and can also be used to help you troubleshoot problems.

  See *PeopleTools 8.52 Installation for <your database platform>,* "Creating a Database."

- *Data Mover* is a utility used to manipulate data, run SQL scripts, and control database access and security.

  Data Mover runs transparently when you use the DCW. Note that you can use Data Mover to access the PeopleSoft database using either two-tier or three-tier mode, depending upon the user name and password you use to log in. You can access it from the workstation program group or from the PeopleSoft PeopleTools installation directory.

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See *PeopleTools 8.52: Data Management PeopleBook,* "Using PeopleSoft Data Mover."

- *PSADMIN* is a command-line executable used during the installation to set up and manage application server domains and Process Scheduler domains. You can access psadmin.exe from the PeopleSoft PeopleTools installation directory.

  See the chapters on configuring the Application Server and setting up Process Scheduler in the PeopleSoft PeopleTools installation guides.

- *Application Designer* is the core development tool used to build and modify PeopleSoft applications.

  In the installation process you use Application Designer to test the two-tier and three-tier connections. You control whether the connection is two-tier or three-tier by your choice of log in user name and password. You can access it from the workstation program group or from the PeopleSoft PeopleTools installation directory.

  See *PeopleTools 8.52: PeopleSoft Application Designer Developer's Guide PeopleBook.*

- *PeopleSoft Change Assistant* is a standalone application used for software updates, maintenance updates, and applying patches and fixes.

  The installation executable for PeopleSoft Change Assistant is included in the PeopleSoft PeopleTools installation directory.

  See *PeopleTools 8.52: PeopleSoft Change Assistant PeopleBook.*

Starting the Installation

The following flowcharts give an overview of a basic PeopleSoft installation. The process shown here essentially follows the chapters in the PeopleSoft PeopleTools installation guides. Each installation guide includes instructions for a variety of configurations; it is a good idea to go through the guide before beginning the installation and determine those sections that relate to your case. Remember that there are also application-specific installation instructions.

In those cases in which the instructions differ for installations on Microsoft Windows and UNIX or Linux operating systems, the installation guides include both versions. Here are notes on some of the decision points included in the flowcharts:

Multiple languages? Read the section Planning Multilingual Strategy in the first chapter of the installation guides for guidance.

Can use DCW? Read the notes at the beginning of the chapters on creating a database to determine whether the Database Configuration Wizard is appropriate for your installation.

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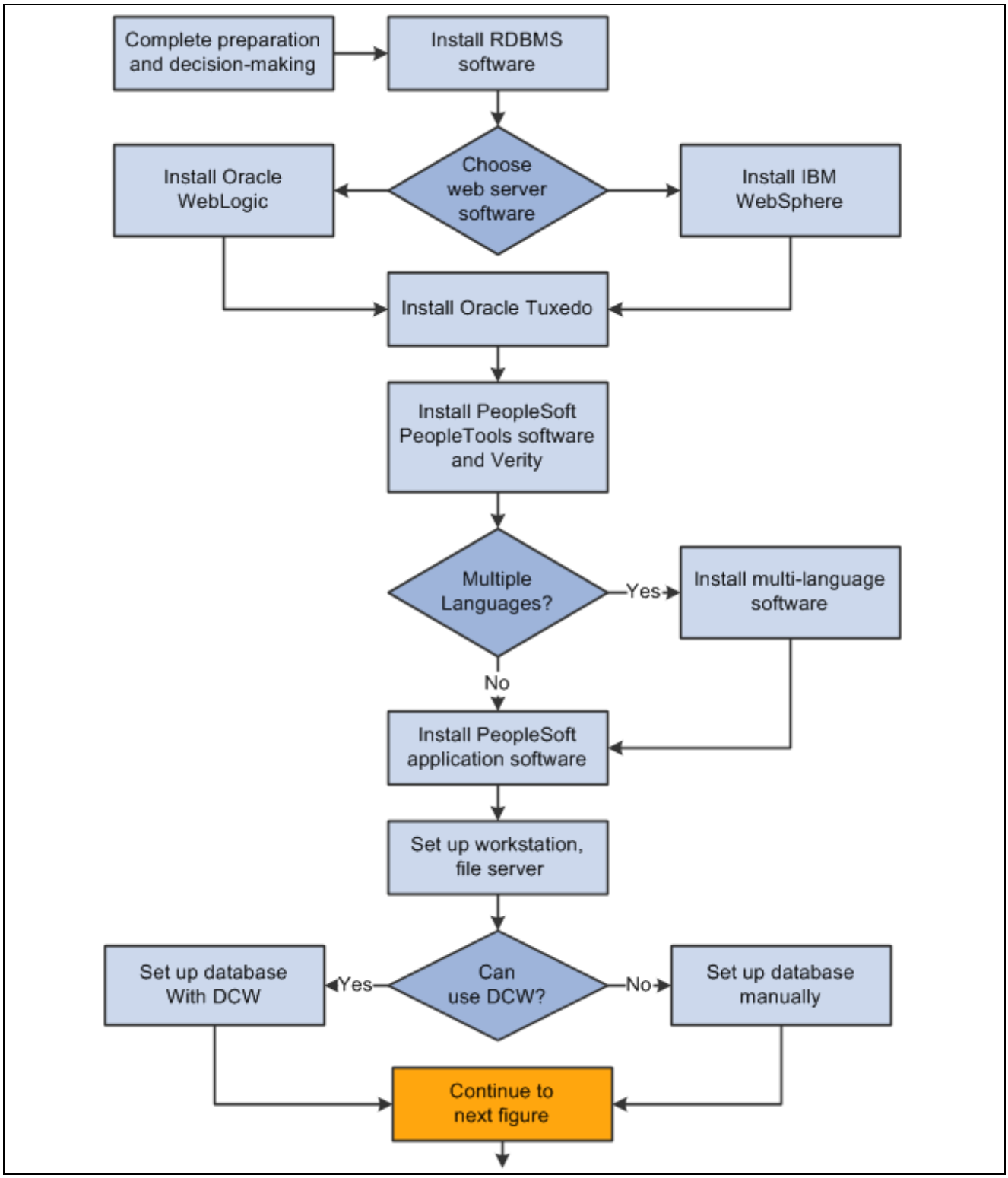

Installation Flow, Part 1

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Database on current PT release? Depending upon which PeopleSoft PeopleTools release was used to build your PeopleSoft application, you may need to run a series of steps to update the database to the latest PeopleTools release. The installation guides include guidance on whether to update the database, but you can also get information from the PeopleSoft certification information on My Oracle Support, as mentioned in an earlier chapter.

Correct problems and retest. It is a good idea to verify a connection to the database as you proceed through the stages of the installation. For example, after setting up the application server, the installation guides recommend that you connect to the database using PeopleSoft Application Designer.

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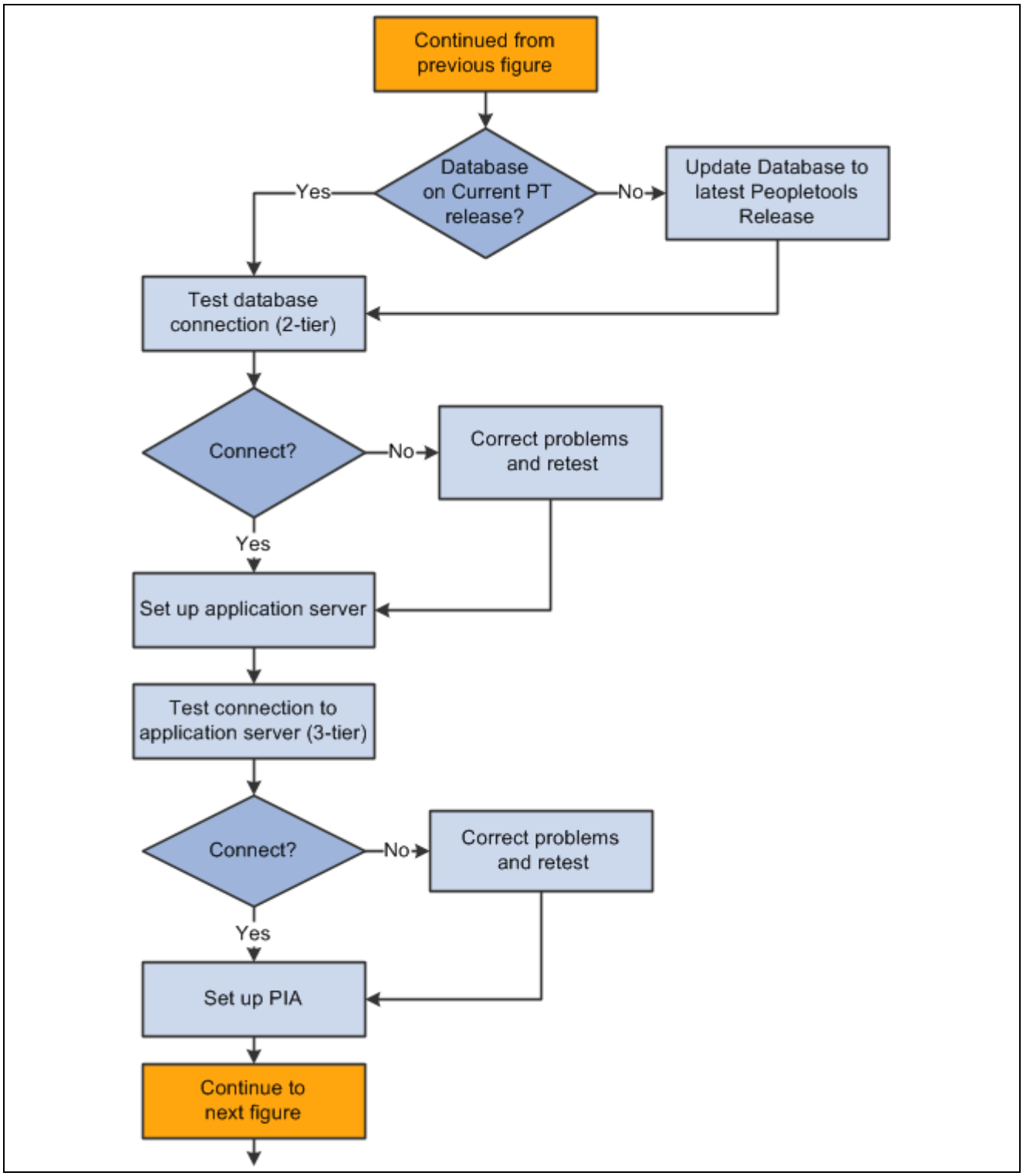

Installation Flow, Part 2

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Is COBOL needed? COBOL is not needed for PeopleSoft PeopleTools or for product applications that contain no COBOL programs. To determine whether your installation requires COBOL, use this COBOL information on My Oracle Support. Search for the article name "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the Micro Focus COBOL Compiler" (article ID 747059.1). The page includes a list of topics that should help you determine whether you need COBOL for your PeopleSoft installation. Use the tool included under the question "Which PeopleSoft product lines use Micro Focus COBOL?" to determine whether your product requires COBOL. A second article, "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the IBM COBOL Compiler," (article ID 1211907.1) covers similar information about the products from IBM.

Choose reporting software. Oracle Business Intelligence (BI) Publisher is the strategic PeopleSoft reporting option provided with PeopleSoft PeopleTools 8.52. You also have the option to use SAP Crystal Reports or BusinessObjects Enterprise software to run and view Process Scheduler reports. Read the chapter "Installing and Configuring Software for Crystal Reports" for information on using SAP Crystal Reports or SAP BusinessObjects Enterprise software.

Additional tasks. Review the discretionary tasks in the second part of the PeopleSoft PeopleTools installation guides and select those needed for your configuration. For example, the instructions for installing PeopleBooks are included as an appendix. PeopleSoft PeopleBooks and the My Oracle Support knowledge base also contain advanced and specialized information that you may be interested in for your configuration, but which is not needed for a basic installation.

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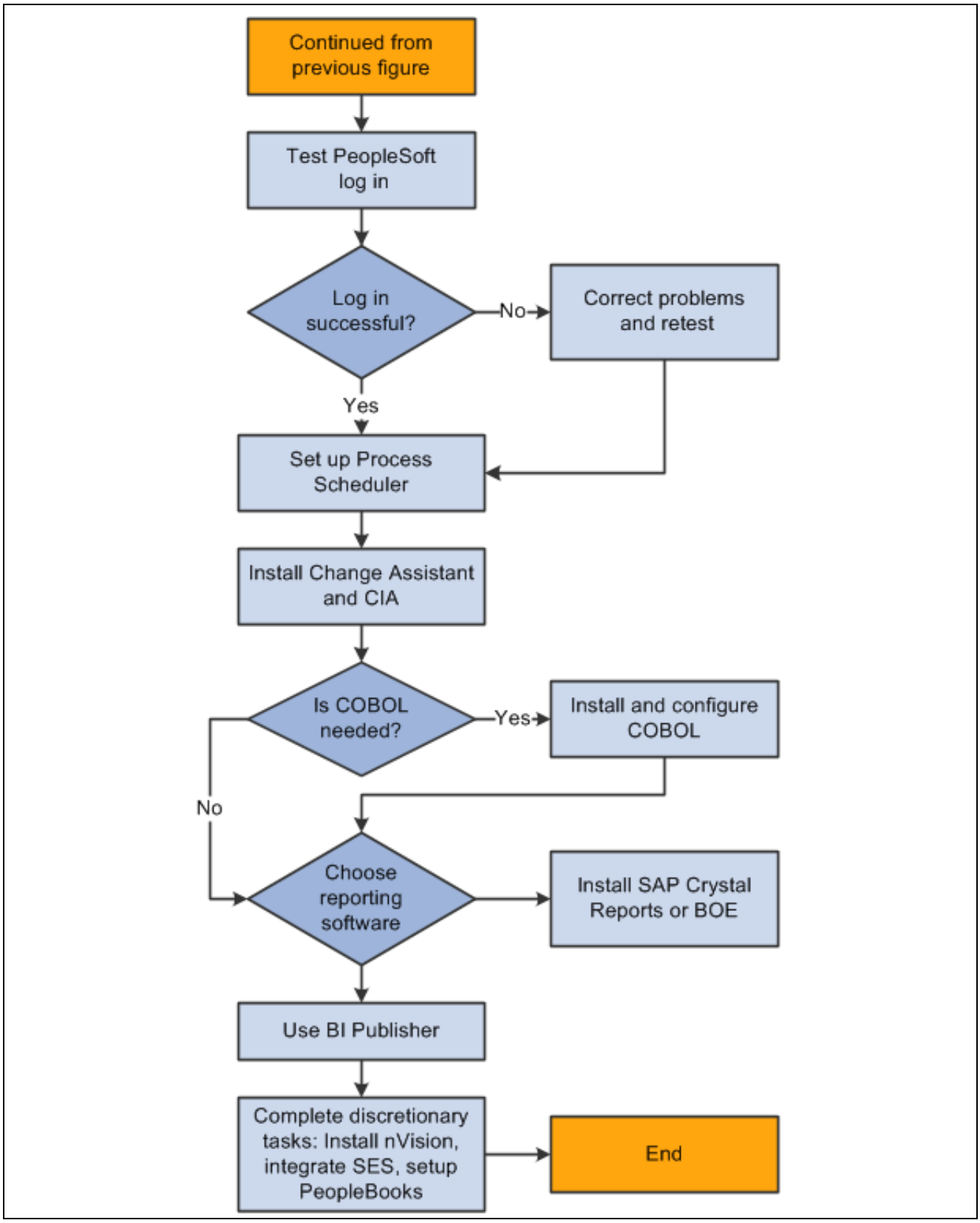

Installation Flow, Part 3

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Index

A

Application Designer 14

B

benchmark performance reports 7

C

certifications 8
Configuration Manager 14

D

Data Mover 14
Database administrator 9
Database Configuration Wizard 14

I

information portal 7
installation flowchart 15
installation overview 1

M

maintenance schedules 9
My Oracle Support
  maintenance schedules 9
  Patches & Updates 9
  reviewing certifications 8
  reviewing the Product Roadmap 8

N

network administrator 9

O

Oracle Consulting 9
Oracle E-Delivery, obtaining installation files 13
Oracle Software Delivery Cloud 13

P

patches and updates 9
PeopleSoft installer 9
PeopleSoft Pure Internet Architecture 1–2
product roadmap 8
psadmin 14

R

release notes 7
release value propositions 7

S

supported platforms 8
system administrator 9

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