PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 Installation

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PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2
Installation
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Contents

Chapter 16

Chapter 17

Chapter 18

Chapter 19

About This Documentation

This preface discusses:

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

Understanding This Documentation

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

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

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

To find the installation documentation for PeopleSoft PeopleTools or for your PeopleSoft application, go to My Oracle Support and search for the installation guide for your product and release.

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

Audience

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

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

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

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

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

See Oracle University http://education.oracle.com

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*.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *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.

Convention	Description
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 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 Resources Management Systems
- Oracle’s PeopleSoft Enterprise Learning Management
- Oracle’s PeopleSoft 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 products.

Related Information

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

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

To access PeopleSoft PeopleBooks, go to My Oracle Support and search for the PeopleSoft PeopleBooks for your application and release.

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

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.

CHAPTER 1

Part I: Common Elements to Install PeopleSoft FMS, ESA, SFO, and SCM Applications

Understanding Part I

The chapters in this section of the documentation include installation instructions that apply to Oracle's PeopleSoft Financial Management Solutions (FMS), PeopleSoft Enterprise Service Automation (ESA), PeopleSoft Staffing Front Office (SFO), and PeopleSoft Supply Chain Management (SCM) applications.

This section includes:

- Installing PeopleSoft PeopleTools and Creating the PeopleSoft Financials/Supply Chain Management Database.
- Configuring Application SQRs and COBOL for DB2 and the OS/390 Server.
- Setting Database Requirements to Run the ChartField Configuration Process.

Task 1-1: Using the Oracle Software Delivery Cloud to Obtain Installation Files

Before beginning the installation, you must obtain the PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 (FSCM 9.1 Feature Pack 2) installation software by downloading the necessary zip files from the Oracle Software Delivery Cloud portal (formerly Oracle E-Delivery). Use the documentation available on the Oracle Software Delivery Cloud to ensure that you obtain all of the zip files that your environment requires.

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

CHAPTER 2

Installing PeopleSoft PeopleTools and Creating the PeopleSoft Financials/Supply Chain Management Database

This chapter discusses:

- Prerequisites
- Installing PeopleSoft PeopleTools and Creating the PeopleSoft Financials/Supply Chain Management Database

Prerequisites

This section provides the prerequisite installation instructions that are required to create the PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 (FSCM 9.1 Feature Pack 2) database.

Before you install specific applications, you must install PeopleSoft PeopleTools and create your PeopleSoft FSCM 9.1 Feature Pack 2 database. You must also set up the installation defaults and delete the summary trees from the System (SYS) database.

Note. PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 requires the installation of PeopleSoft PeopleTools 8.52.02 or higher.

See *PeopleTools 8.52 Installation,* "Creating a Database."

Task 2-1: Installing PeopleSoft PeopleTools and Creating the PeopleSoft Financials/Supply Chain Management Database

This section discusses:

- Verifying the PeopleSoft PeopleTools Version
- Reviewing the PeopleSoft FSCM Demo Database Sizing Information
- Installing Application Files to the Custom PS_APP_HOME Location
- Installing the PeopleSoft FSCM Database on Sybase
- Reviewing EDM Pool Considerations
- Setting Up Installation Defaults for the PeopleSoft FSCM System Database

- Deleting Summary Trees for the PeopleSoft FSCM System Database
- Installing Multilingual File References and Maintenance Log Data
- Reviewing SWPAUDIT Results

Task 2-1-1: Verifying the PeopleSoft PeopleTools Version

The PeopleSoft FSCM 9.1 Feature Pack 2 database requires the installation of PeopleSoft PeopleTools 8.52.02 or higher.

Task 2-1-2: Reviewing the PeopleSoft FSCM Demo Database Sizing Information

The following table lists the approximate PeopleSoft FSCM 9.1 Feature Pack 2 Demo database size for each RDBMS platform.

Platform	Approximate Database Size
Oracle — Non-Unicode/Unicode	30 GB
DB2 LUW — Non-Unicode	32.7 GB
DB2 LUW — Unicode	64.8 GB
DB2 z/OS — Non-Unicode	25.2 GB
DB2 z/OS — Unicode	31.2 GB
Sybase	25 GB
Informix	15.2 GB
Microsoft SQL Server — Non-Unicode	5.3 GB
Microsoft SQL Server — Unicode	7.4 GB

Note. Oracle recommends that you increase the Database Heap Size for the DB2 LUW platform *only* to a minimum of 20,000 to avoid any temporary table failure during Demo database creation.

Note. For the sake of brevity, this documentation sometimes refers to DB2 UDB for z/OS as *DB2 z/OS*, and sometimes refers to DB2 UDB for Linux, UNIX and Microsoft Windows as *DB2 LUW*.

Task 2-1-3: Installing Application Files to the Custom PS_APP_HOME Location

Beginning with PeopleSoft PeopleTools 8.52, you can elect to install your PeopleSoft application files into a custom location that is identified by the PS_APP_HOME environment variable.

You can continue to install applications into PS_HOME using the traditional approach, or you can install to the custom location PS_APP_HOME. Electing to continue using the traditional PS_HOME structure brings no impact to your implementation, and you can carry on the same as before. However, if you are seeking further modularity and more streamlined implementations, then installing your PeopleSoft application into a separate PS_APP_HOME location is an attractive alternative.

For more information about PS_APP_HOME and the corresponding instructions to configure and implement this option, you can refer to the following documentation that is available on My Oracle Support, the Oracle Technology Network and the Hosted PeopleBooks web sites:

See *Oracle's PeopleSoft PeopleTools 8.52 Release Notes*

See *PeopleTools 8.52 Installation*, for your database platform.

See *PeopleTools 8.52: System and Server Administration PeopleBook*

Note. For the purposes of this installation document, use the reference <PS_APP_HOME> as the location where the application files will reside. If you are not implementing the split location, then this variable will be equal to <PS_HOME>.

Task 2-1-4: Installing the PeopleSoft FSCM Database on Sybase

PeopleSoft FSCM 9.1 Feature Pack 2 requires a minimum 4K page size on Sybase.

Task 2-1-5: Reviewing EDM Pool Considerations

The PeopleSoft installation procedure places all tables for the product that you are installing into multiple, physical DB2 z/OS databases using a shared table space methodology. Depending on the applications that you are installing, the DB2 subsystem may have a minimum EDM Pool Size of 10-30 MB.

Task 2-1-6: Setting Up Installation Defaults for the PeopleSoft FSCM System Database

Run the following script against the System (SYS) database only for PeopleSoft FSCM:

```
EPINSSYS.DMS -- Installation Defaults
```

This script establishes the installation defaults for the database. This only runs against the System (SYS) database.

Task 2-1-7: Deleting Summary Trees for the PeopleSoft FSCM System Database

Run the following script only against the System (SYS) database only for PeopleSoft FSCM:

```
EPCLNTRE.DMS -- Tree Definitions
```

This script deletes all of the summary trees from the database. This script only runs against the System (SYS) database.

Task 2-1-8: Installing Multilingual File References and Maintenance Log Data

These steps should only be run if you have installed the multilingual media pack.

This task details how to load the multilingual file references and multilingual maintenance log data.

To import multilingual data:

1. Using PeopleSoft Data Mover, sign on to your PeopleSoft FSCM 9.1 Feature Pack 2 application database.
2. Open the PeopleSoft Data Mover script:

   <PS_APP_HOME>\scripts\multilingual_data_i.dms

3. Run this script against your PeopleSoft FSCM 9.1 Feature Pack 2 application database.
4. Close PeopleSoft Data Mover.

Task 2-1-9: Reviewing SWPAUDIT Results

This step only applies if the multilingual media pack has been installed *and* if you plan to swap your base language *and* run swpaudit.

The following SWPAUDIT exceptions are expected and can be ignored:

(SWAP-3) The following Related Language View(s) Have The Wrong Structure Defined

Record Name	Rel Language Record	Unmatched Field	Ownerid
----------------	----------------	----------------	----------------
CURRENCY_CD_VW	CURRCD_TBL_LANG	DESCRSHORT	PPT
CURRENCY_CD_VW	CURRCD_TBL_LANG	EFFDT	PPT
PSADSDEFNSRC_VW	PSADSDEFNSLNG_VW	DESCR254	PPT
SPR_EXPCYCRC_VW	SPR_EXPCYCVC_LV	SP_SUPPLIER_NAME	DSP

CHAPTER 3

Configuring Application SQRs and COBOL for DB2 and the OS/390 Server

This chapter discusses:

- Understanding SQR and COBOL Processing on the DB2 z/OS Server
- Allocating Data Sets on the OS/390 File Systems
- Modifying the JCL Shells

Understanding SQR and COBOL Processing on the DB2 z/OS Server

This section applies if you plan to use the PeopleSoft FSCM 9.1 Feature Pack 2 product on the DB2 OS/390 database platform and want to run SQR and COBOL processes on the OS390 server that require reading of and writing to external files.

For both SQR and COBOL processing on the DB2 z/OS server, standard JCL templates are provided for use by the process scheduler to submit jobs in the z/OS server. These shells accommodate basic input and output files that the program engines themselves determine. However; for those SQR and COBOL processes that require special input or output files, additional modifications must be made to the JCL templates to accommodate these files.

PeopleSoft General Ledger and PeopleSoft Cash Management both contain several of these special files in certain SQR processes. To accommodate these files, you must pre-allocate data sets on the OS/390 file system, as well as modify the JCL shells.

Task 3-1: Allocating Data Sets on the OS/390 File Systems

You can use sequential or partitioned data sets in COBOL and SQR processing. The DISP parameter in the JCL is critical to the successful execution of a JCL job submission and very sensitive to the data set disposition at the initiation of the job. For this reason, Oracle strongly recommends that you use a partitioned data set, rather than sequential data sets—particularly for output files—and for input files, when the existence of the actual file drives the processing path that the program takes.

The same JCL Shells are shared by all like processes, and an invalid file disposition can prevent all processes from executing successfully, not just the process that actually uses the file. For this reason Oracle recommends that you use DISP=SHR in the JCL Shells, as discussed later in this document. DISP=SHR presumes that the data set exists at the initiation of a job execution. If the data set does not exist, a JCL error occurs. For a PDS, the individual member does not need to exist, only the root data set. If the member does not exist, the OS/390 file management system automatically creates it.

You should allocate partitioned data sets that include the following attributes:

- The `record` format should be variable block (RECFM=VB).
- The record length should be slightly wider than the record length of the file, as defined within the SQR itself.

  Refer to the table that follows for SQR LRECL definitions.
- The data set name type should be PDS (DSORG=PO).

The following is an example of a JCL statement to allocate a PDS:

```
//*
//PDSALL   DD DSN=PSHLQ.PPVVV.SQRFILES,
//            DISP=(,CATLG,DELETE),
//            DCB=(DSORG=PO,RECFM=VB,LRECL=500),
//            VOL=SER=,
//            SPACE=(TRK,(200,95,75),RLSE),
//            UNIT=SYSDA
// *
```

The following table details the information that you can use to both pre-allocate the data set and modify the JCL Shells for PeopleSoft FMS in the next step.

PeopleSoft Product	SQR or COBOL Program Name	DD Card Name[1]	Data Set Type / Record Format / Record Length	Member Name or Random Name[2]
General Ledger	GLS7500	Defined and entered by the customer	PDS/VB/850	Specific Member name (OUTPUT FILE)
Treasury	ECIN0001	Defined and entered by the customer.	PDS/VB/500	Specific Member name (OUTPUT FILE)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

The following tables detail the information that you can use to both pre-allocate the data set and modify the JCL Shells for PeopleSoft SCM in the next step.

PeopleSoft Inventory:

SQR or COBOL Program Name	DD Card Name[1]	Data Set Type / Record Format / Record Length	Member Name or Random Name[2]
INS9050	INCOUNT	PDS/VB/250	Specific Member name (INPUT FILE)
INS9051	INCOUNT	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9080	INFCST	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9081	INFCST	PDS/VB/250	Specific Member name (INPUT FILE)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

PeopleSoft Manufacturing:

SQR or COBOL Program Name	DD Card Name [1]	Data Set Type / Record Format / Record Length	Member Name or Random Name [2]
SFS1100	SELPID	PDS/FB/183	Specific Member name (OUTPUT FILE)
SFS1600	SELPID	PDS/FB/183	Specific Member name (OUTPUT FILE)

[1]DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

Task 3-2: Modifying the JCL Shells

The PeopleSoft release delivers three shells. One for COBOL, SHELCBL.JCT, and two for SQRs, SHELSQRF.JCT and SHELSQRP.JCT. The shells are in the <PS_HOME>/appserv/prcs/shelljcl directory in Unix System Services.

For each file and each program to be run with that JCL shell, the shell itself must be modified with the appropriate DD statement name and corresponding data set name. For example, if there are six SQRs that reference a total of 10 special input or output files, and these SQRs use the SHELSQRF.JCT JCLshell, then 10 DD statement cards must be added to the appropriate section of the SHELSQRF.JCT file.

The following is an example of the editing requirements in JCL shell SHELSQRF.JCL to accommodate special files that are referred to as INSQR1 and INSQR2 in the SQR programs (change is in bold font):

```
//*CTRANS    DD DSN=&SQRHLQ..LINKLIB,DISP=SHR
//SQRDIR   DD DSN=&SQRHLQ..ERRDAT,DISP=SHR
//SI       DD DSN=&PSHLQ..SQRINC,DISP=SHR
```

```
//SYSTERM  DD SYSOUT=*
//SYSOUT   DD SYSOUT=*
//DBGLOG   DD SYSOUT=*
//SYSTMPDB DD UNIT=WORK,SPACE=(TRK,25)  VS1 ONLY
//SP       DD DSN=&PSHLQ..SQRSRC(&SQRID),DISP=SHR
//*  ADD DD STATEMENTS HERE FOR LIBRARY CONCATENATION
//*
//SYSTERM  DD SYSOUT=*
//*
%SQROUT%
//*
//SQRPOST  DD DSN=&SQRHLQ..DAT(POSTSCRI),DISP=SHR
//SYSERR   DD SYSOUT=*
//SYSTSIN  DD DSN=&PSHLQ..PARMLIB(NOPARMS),DISP=SHR
//SYSIN    DD DSN=&PSHLQ..PARMLIB(&PRMID),DISP=SHR
//SQRINI   DD DSN=&PSHLQ..SQRSRC(PSSQRINI),DISP=SHR
//INSQR1   DD DSN=&PSHLQ..INSQRPDS(A%INSTANCE%),DISP=SHR
//INSQR2   DD DSN=&PSHLQ..INSQRPDS(INFILE),DISP=SHR
//        PEND
//*
//%PRCSNAME% EXEC SQRPROC,SQRID=%PRCSNAME%
//SYSTSIN  DD *
DSN SYSTEM(%DB2SUB%)
RUN PROG(SQR)  -
PLAN(SQRPLAN) -
LIB('SYS5.SQR614B1.SQR.UNICODE.LOAD') -
%SQRFLAGS%
END
//*
//SYSIN  DD *
%SQRPARMS%
/*
```

If you have already configured a process scheduler, the shells that are used by that configuration can be found in: <PS_CFG_HOME>/appserv/prcs/<process scheduler name>/shelljcl.

Note. You must stop and restart the process scheduler for the edits in the JCL shells to take effect.

CHAPTER 4

Setting Database Requirements to Run the ChartField Configuration Process

Understanding Database Requirements for the ChartField Configuration Process

Due to the large number of updates that the ChartField Configuration Application Engine program (FS_CFCONFIG) performs, you may encounter certain database errors when running the program. This is particularly true if you are adding or deleting ChartFields in your configuration. To address this, use the database settings that Oracle provides in the following section as a starting point; however, you may need to adjust these upward if you encounter errors while running the utility.

Task 4-1: Defining Settings to Run ChartField Configuration

Oracle recommends the following settings when you run the ChartField Configuration for the supported database platforms:

- DB2 LUW
    - Update the locking mode to share:

      ```
      db2set DB2_RR_TO_RS = yes
      ```

      This sets Lock mode requested = Next Key Share (NS).
    - Include the following command in the DBMCFG.SQL configuration file:

      ```
      UPDATE DBM CFG USING QUERY_HEAP_SZ  64000
      ```
    - Log file size (4KB): (LOGFILSIZ) = 24000
    - Number of primary log files: (LOGPRIMARY) = 20

- Use the following minimum Tablespace sizes (you may need to increase these):

BDAPP	9720
BDAPPIDX	2680
BDLARGE	1191
FAAPP	11312
FSLARGEIDX	13568
LCAPP	28572
LCAPPIDX	2600

- Recycle the instance after you change the settings.

- DB2 z/OS

  No changes are recommended.

- Informix
  - Log Space = 2800MB
  - LOCKS = 2,500,000
- Microsoft SQL Server 2000

  Log Space = 1500MB

- Oracle
  - Rollback or UNDO Tablespace = 1536MB
  - Rollback Segment sizing: Initial Extent + (Next Extent * Maxextents) = 1024MB (approximate).
  - dml_locks = 1024 (set in init.ora).
  - Changing the dml_locks setting requires you to recycle the instance.
- Sybase
  - Log Space = 2000MB
  - Log Space = 2000MB

CHAPTER 5

Part II: Installing PeopleSoft FMS, ESA and SFO Applications

Understanding Part II

This section includes:

- Installing PeopleSoft 9.1 General Ledger
- Installing and Setting Up Forms Processing for PeopleSoft 9.1 Grants
- Installing PeopleSoft 9.1 Expenses
- Installing PeopleSoft 9.1 Pay/Bill Management
- Installing PeopleSoft 9.1 ESA and FSCM Portal Packs
- Integrating PeopleSoft 9.1 Project Costing and Program Management with Microsoft Project 2007
- Defining an FTP Server for File Attachments in PeopleSoft 9.1 Project Costing
- Setting Up PeopleSoft 9.1 Staffing Front Office
- Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management
- Installing PeopleSoft 9.1 Maintenance Management with Microsoft Project 2007
- Installing PeopleSoft 9.1 Maintenance Management Work Order Attachment Print
- Integrating PeopleSoft 9.1 Asset Management with eCenterOne Space Management Solution
- Integrating PeopleSoft 9.1 Asset Management with Physical Inventory Solutions
- Integrating PeopleSoft 9.1 IT Asset Management with Network Inventory Discovery Systems

CHAPTER 6

Installing PeopleSoft 9.1 General Ledger

This chapter discusses:

- Prerequisites
- Changing a URL Definition for General Ledger File Import (Optional)
- Defining an Environmental Variable on a Process Scheduler Server
- Running File Import Processes Using the DB2 z/OS Database

Prerequisites

This document describes the steps necessary to establish the file attachment storage location for documents that you import to PeopleSoft General Ledger and the database specifics for various file import processes.

The file import processes in this chapter depend on the setup details in the following table:

Process	Description
GL_JRNL_IMP	Flat file journal import
GL_LED_IMP	Flat file ledger import
GL_EXCL_JRNL	Spreadsheet journal batch import
GL_F2_MAF	FACTS II Load MAF Data
GLFACTSI_MAF	FACTS I Load Data (FACTSI MAF, SGL Accounts, Trading Partners)
GL_GOALS_IMP	GOALS Disbursement/Receipt Files (Ledger Activity and Trial Balance)

Task 6-1: Changing a URL Definition for General Ledger File Import (Optional)

The URL definition GL_FILE_IMPORT defines the storage location of the file attachment. By default, this points to a database record. You may want to change the storage location of the file attachment to another location, such as an FTP server. This task is optional.

To change the URL definition:

1. Select PeopleTools, Utilities, Administration, URLs.

2. Open GL_FILE_IMPORT.
3. Change the URL definition to an FTP server location of your choice.

See Also

PeopleTools 8.52: PeopleCode Developer's Guide PeopleBook, "Understanding File Attachments and PeopleCode."

Task 6-2: Defining an Environmental Variable on a Process Scheduler Server

You are required to define an environmental variable, PS_FILEDIR. This variable defines the temporary flat file location on the process scheduler that runs the file import process.

- If you are using a UNIX or z/OS process scheduler, edit the *psconfig.sh* file and specify the flat file location in the environment variable `PS_FILEDIR`.

  For example: `PS_FILEDIR=/tmp;export PS_FILEDIR`
- If you are using a Microsoft Windows process scheduler, from your Start menu select Programs, Control Panel, System. Select the Advanced tab and click Environment Variables. Add or modify the system variable `PS_FILEDIR` and specify its value.

  For example: `C:\TEMP`

Note. For more technical information on this topic, refer to the PeopleSoft PeopleTools description of `GetFile() PeopleCode` for details, or consult your system administrator.

Task 6-3: Running File Import Processes Using the DB2 z/OS Database

This is a general reminder for those who run import processes. If the import process enables you to specify Character Set, select the Character Set appropriate to the flat file that you are importing. For example, you may select ISO_8859-6 for Arabic, and JIS_X_0208 or Shift_JIS for Japanese.

For those who are running the following specific import processes:

```
GL_F2_MAF
GLFACTSI_MAF
GL_GOALS_IMP
```

If you have a DB2/390 database and you prepare the flat file in ASCII format, you can only run the process on a Microsoft Windows or a UNIX process schedule server. If you prepare the flat file in EBCDIC format, you can only run the import process on a OS390 process schedule server. For all other databases, there is no limitation on the type of process schedule servers. You should set up the appropriate process scheduler for these processes.

CHAPTER 7

Installing and Setting Up Forms Processing for PeopleSoft 9.1 Grants

This chapter discusses:

- Understanding Forms Processing
- Downloading the Forms from the Sponsor Web Sites
- Setting Up the Forms URL Maintenance Area in PeopleSoft
- Entering the Names of the PDF Templates (Optional)
- Printing the Forms (Optional)
- Viewing Reports

Understanding Forms Processing

The PeopleSoft Grants forms printing solution uses file layouts to generate XML. This is accomplished by using existing PeopleSoft PeopleTools functionality. Through the use of XML/XFDF, the PeopleSoft Grants forms solution maps all of the required data elements to the actual sponsor forms. As a result, you can edit and print forms online using Adobe Acrobat Reader 5.0 (or higher). Because this solution uses standard PeopleSoft PeopleTools technology, you no longer need to engage an additional component (third-party) application to fulfill your form printing needs.

You can use the new forms printing solution with the following forms:

- Grant Application (PHS 398)

  This is the set of proposal application forms that the National Institutes of Health requires for funding requests. It should be noted that this form set is in the process of being superceded by SF-424 R&R submissions through Grants.gov.

- Non-Competing Grant Progress Report (PHS 2590)

  This is an interim progress report that the National Institutes of Health requires recipients to submit for funding. This form is typically submitted on an annual basis.

- Federal Cash Transaction Report (SF- 272)

  This is an Office of Management and Budget form that is utilized to provide an accounting of your cash position with the government during a specific time frame. This form is typically submitted on a quarterly basis.

- Financial Status Report (SF-269)

  This is an Office of Management and Budget form. It is utilized to provide a periodic accounting on grants that you have received. It includes information such as expenditures, budget, and remaining balances.

Task 7-1: Downloading the Forms from the Sponsor Web Sites

To set up the forms solution for your database, you must download the following .pdf files from the sponsor web sites:

- http://grants.nih.gov/grants/funding/2590/2590_forms.pdf

  Full Package of 2590 Reports that include: Grant Progress Report, Form Page 1 - Continued, Detailed Budget for Next Budget Period – Direct Costs Only, Budget Justification/Current Budget Period, Progress Report Summary, Checklist, All Personnel Report, Next Budget Period, Targeted/Planned Enrollment Table, Inclusion Enrollment Report, Trainee Diversity Report.

- http://grants.nih.gov/grants/funding/phs398/398_forms.pdf

  Grant Application

- http://grants.nih.gov/grants/funding/phs398/biosketch.pdf

  Biographical Sketch

- http://grants.nih.gov/grants/funding/phs398/continuation.pdf

  Continuation Format Page

- http://grants.nih.gov/grants/funding/phs398/fp4.pdf

  Detailed Budget for Initial Budget Period Direct Costs Only

- http://grants.nih.gov/grants/funding/2590/enrollment.pdf

  Targeted/Planned Enrollment Form

- http://www.fhwa.dot.gov/aaa/pdfs/sf269a.pdf

  Financial Status Report - Short Form

- http://www.whitehouse.gov/sites/default/files/omb/grants/sf269.pdf

  Financial Status Report - Long Form

- http://www.whitehouse.gov/sites/default/files/omb/grants/sf272.pdf

  Federal Cash Transactions Report

- http://www.tc.faa.gov/logistics/grants/forms/sf272a.pdf

  Report of Federal Cash Transactions - Continued

Place these files in the location that is defined for the URL maintenance area, as described in the following section.

See “Setting Up the Forms URL Maintenance Area in PeopleSoft”

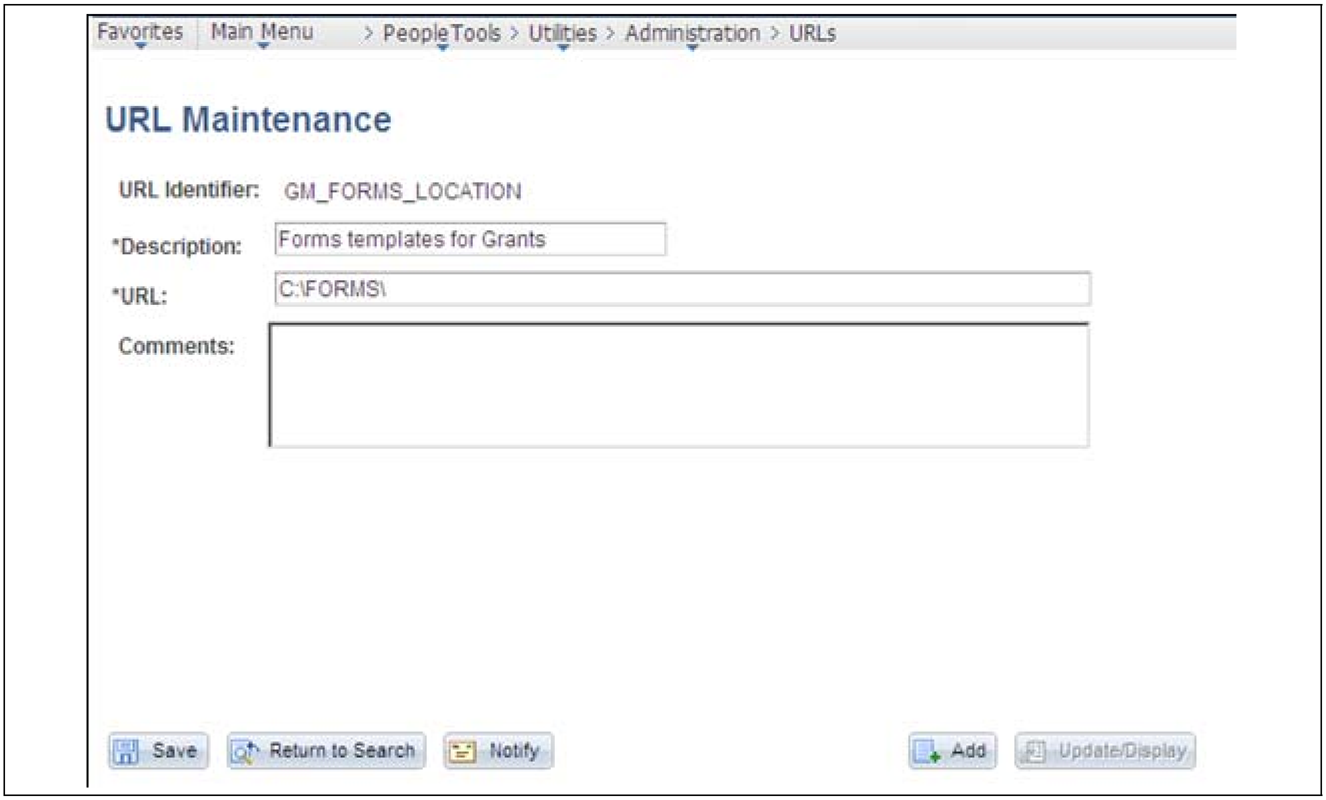
Task 7-2: Setting Up the Forms URL Maintenance Area in PeopleSoft

To set up the forms URL maintenance area:

1. Select PeopleTools, Utilities, Administration, URLs.

2. On the URL search page, search for and select the URL *GM_FORMS_LOCATION*.

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



URL Maintenance page

3. On the URL Maintenance page, in the URL field, enter the location where you placed the forms.

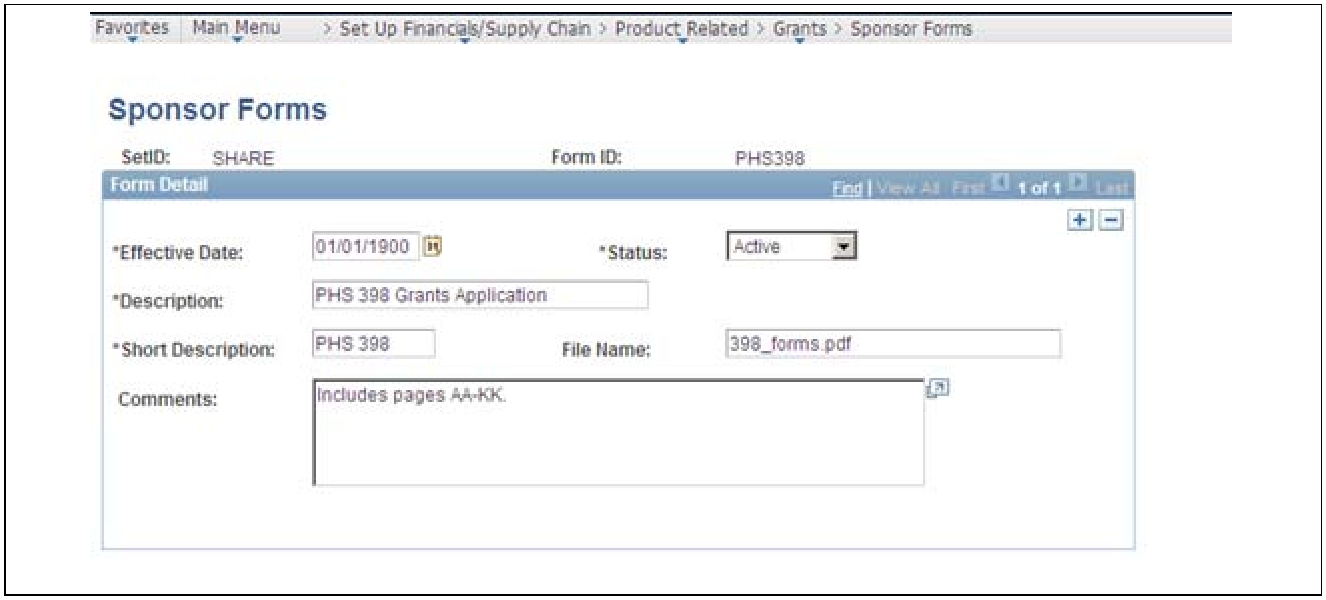
   This location can be a file system location such as G:\FORMS\. In this case, your users must have access to this location when viewing the printed forms. This location can also be a Web address such as http://www.university.edu/Administration/Grants/Forms/.

Task 7-3: Entering the Names of the PDF Templates (Optional)

To enter the PDF template names:

1. Select Set Up Financials/Supply Chain, Product Related, Grants, Sponsor Forms.

   The Sponsor Forms page appears, as shown in the following example:



Sponsor Forms page

2. Search for and access the pages for the forms in the following table using an appropriate SETID value.

   Then ensure that the file names that are listed in the following table are reflected in the File Name field.

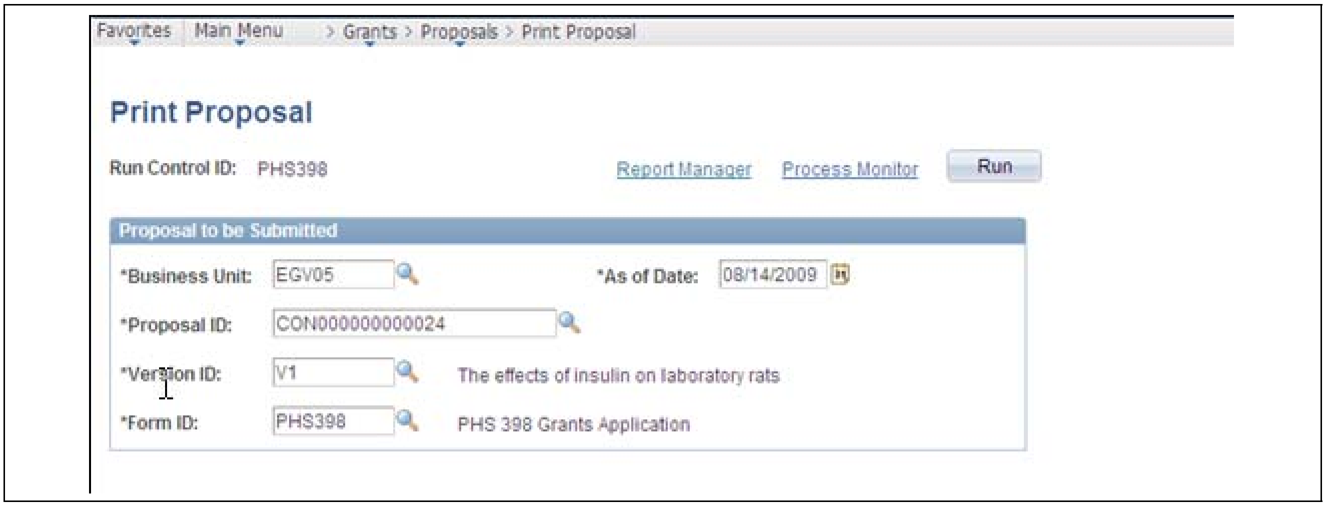
   Note. If you are making changes to currently effective dated values, you must do so by first clicking the Correct History button to enter the correction mode.

Form ID	File Name (example)
PHS398	398_Forms.PDF
2590	2590_Forms.PDF
NIHMOD	398_Modular.PDF

Task 7-4: Printing the Forms (Optional)

To print the forms:

1. Select Grants, Proposal, Print Proposal to access the Create Printed Proposal page, as shown in the following example:



Proposal to be Submitted page

2. Create your own Run Control ID.
3. Click the look up button to select a value for the following fields:
   - Business Unit
   - Proposal ID
   - Version ID
   - Form ID
4. Click the Run button.

   The system displays the Process Scheduler Request page.
5. In the Server Name drop-down list box, select the server that you want to use, and then click OK.

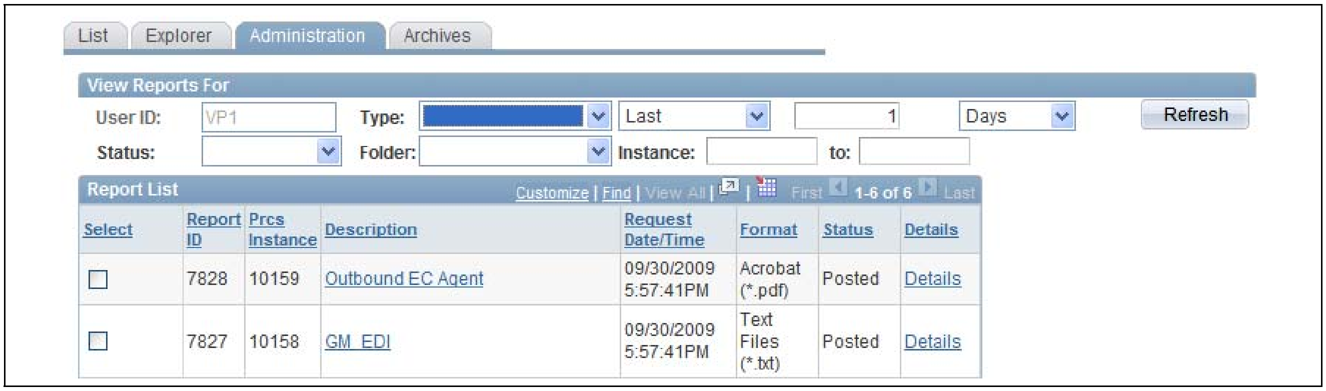
Task 7-5: Viewing Reports

You need Adobe Acrobat Reader 5.0 or higher to view reports.

To view reports:

1. Select Reporting Tools, Report Manager, Administration.

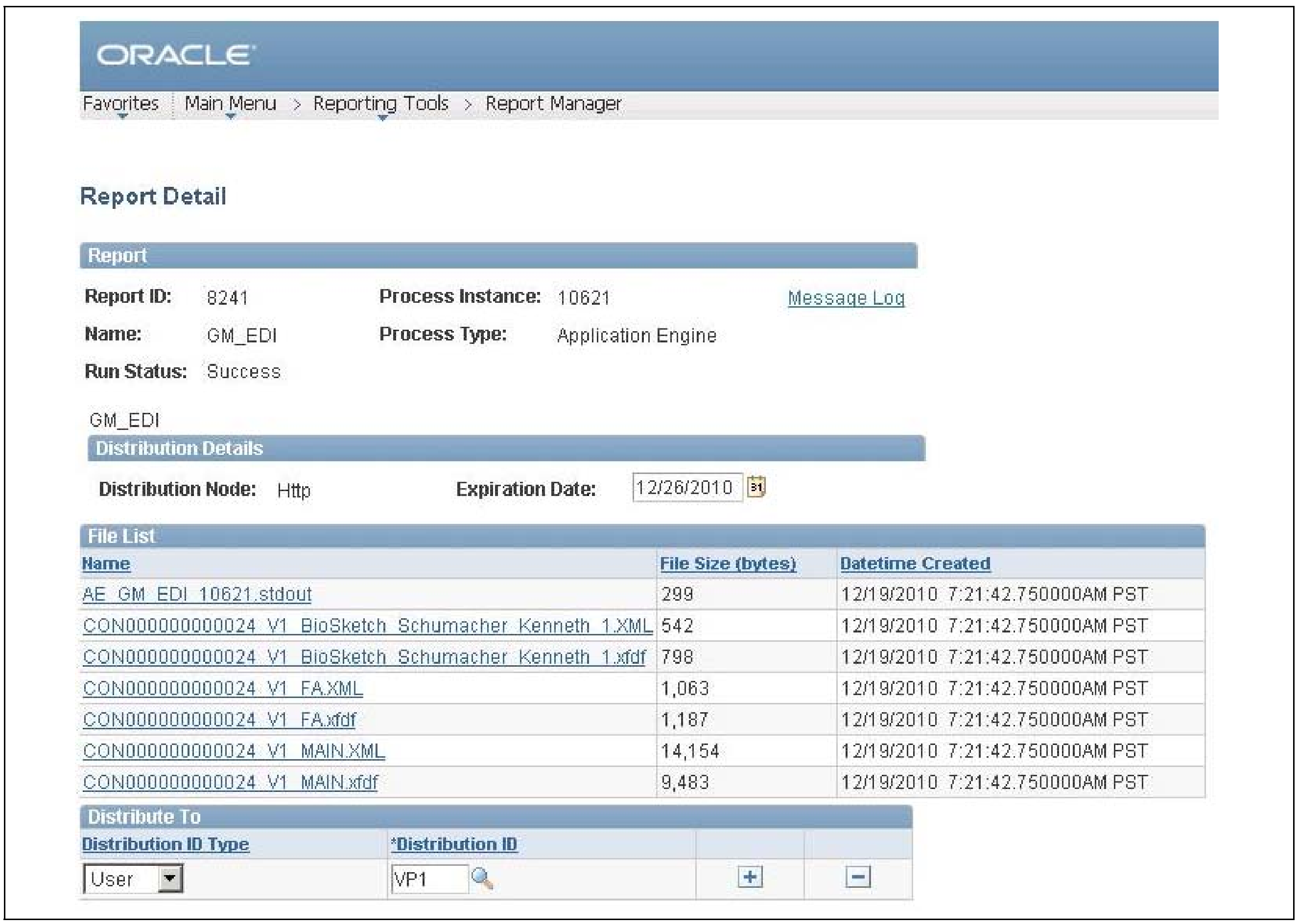
   The Report Manager - Administration page appears, as shown in the following example:



Report Manager - Administration page

2. On the Report Manager - Administration page, locate your process instance (the report description is GM_EDI).
3. Click the Details link in the GM_EDI row to view a list of files that are related to the proposal.

   The Report Detail page appears, as shown in the following example:



Report Detail page

4. On the Report Detail page, view or print a file by clicking the file link and downloading the file to a local location.
5. After you download the file, double-click the local file to open and print.

CHAPTER 8

Installing PeopleSoft 9.1 Expenses

This chapter discusses:

- Configuring PeopleSoft Integration Broker
- Configuring the Employee Portal Servlet URL
- Installing Oracle iReceipts for Your Apple iPhone

Task 8-1: Configuring PeopleSoft Integration Broker

Understanding the PeopleSoft Integration Broker Configuration

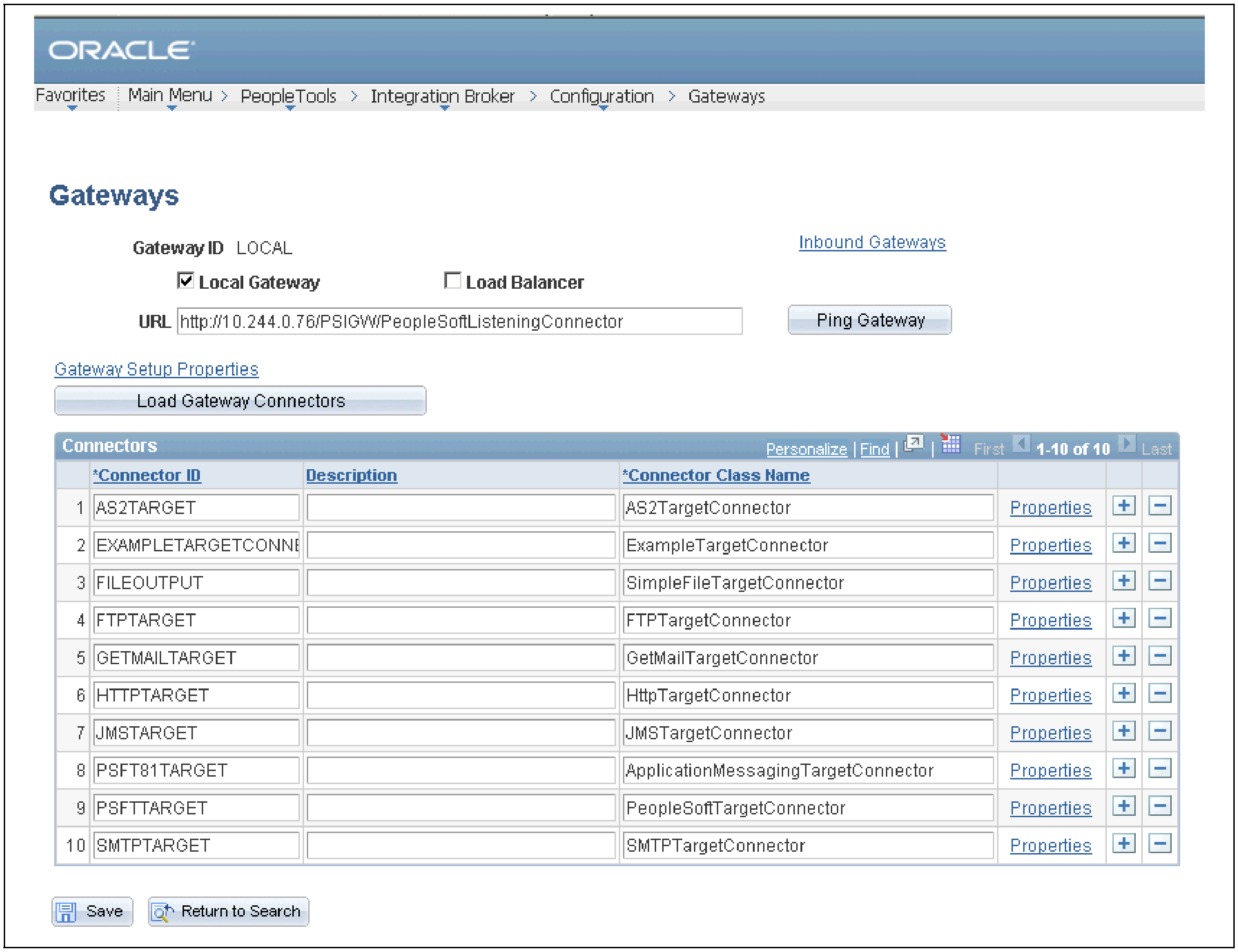
This chapter details the configuration of the PeopleSoft Integration Broker for Approvals.

Task 8-1-1: Setting Up Gateways

To set up the local gateway and load balancer:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search.

   The Gateways page for the local gateway automatically appears by default, as shown in the following example:

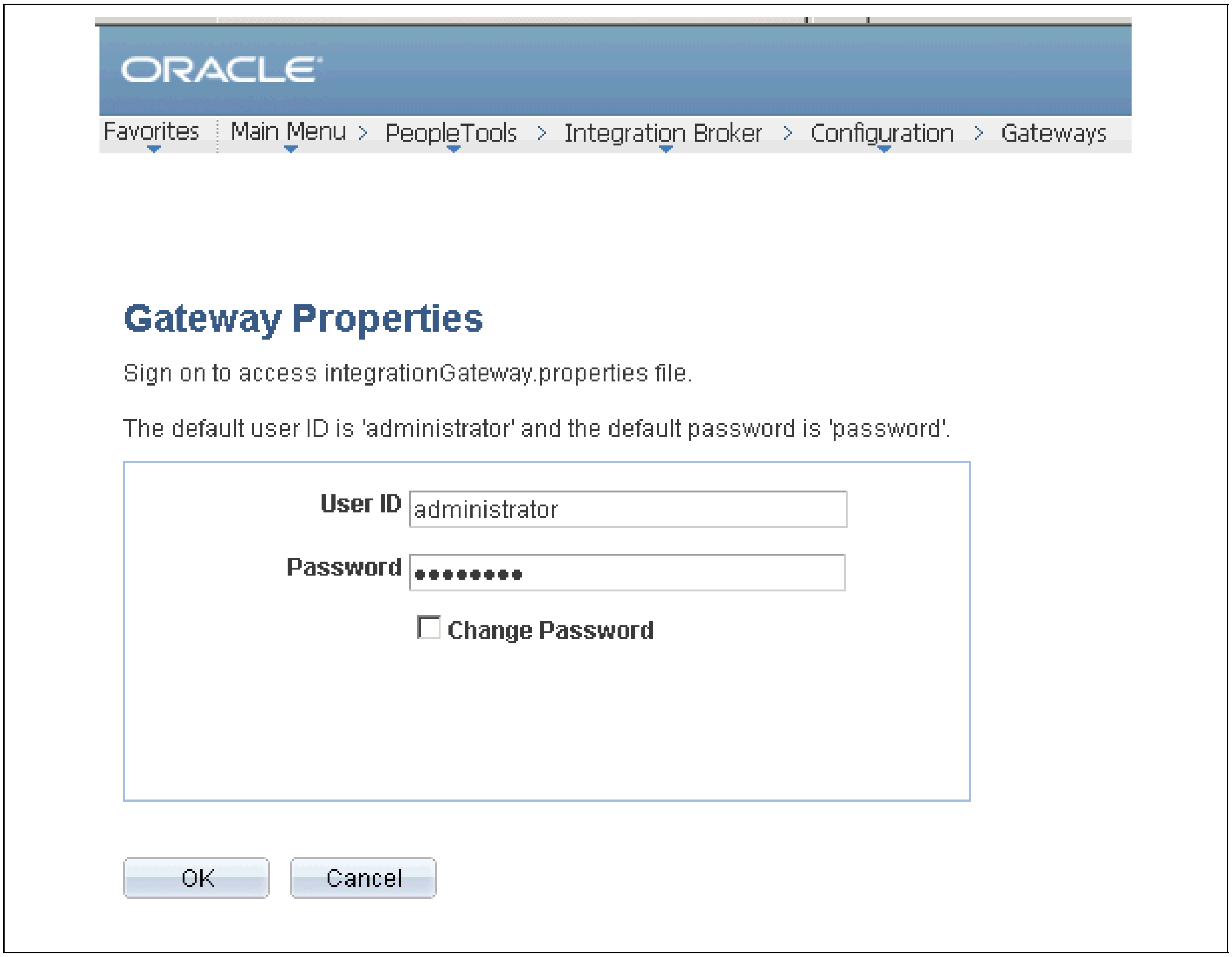


Gateways page

3. On the Gateways page, do the following:
   a. Select the Local Gateway check box.
   b. Select the Local Balancer check box.
4. In the URL field, enter the URL for the Local Gateway and the Physical Gateway as follows:

   http://<IB Hostname>:<port>/PSIGW/PeopleSoftListeningConnector
5. Click the Load Gateway Connectors button.
6. Click Save.
7. Click the Ping Gateway button to ensure connectivity and proper configuration.
8. Click the Gateway Setup Properties link.

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



Gateway Properties sign on page

9. On the Gateway Properties sign on page, do the following:
   a. In the User ID field, enter *administrator*.
   b. In the Password field, enter your password.
   c. Click OK.
10. On the Gateway Properties page, in the Gateway Default App. Server group box, enter values for the following fields:
    - App server URL
    - User ID
    - Password
    - Tools release (PeopleTools)
11. Add the node *PSFT_EP* (the PeopleSoft FSCM application server node).

    Use the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway, as it must match exactly.
12. Click Save.

13. Ping the PSFT_EP node to verify that it is responding.

    If a ping is successful, the Ping Node Results page shows a value of Success in the Message Text column.

Task 8-1-2: Activating the Local Domain

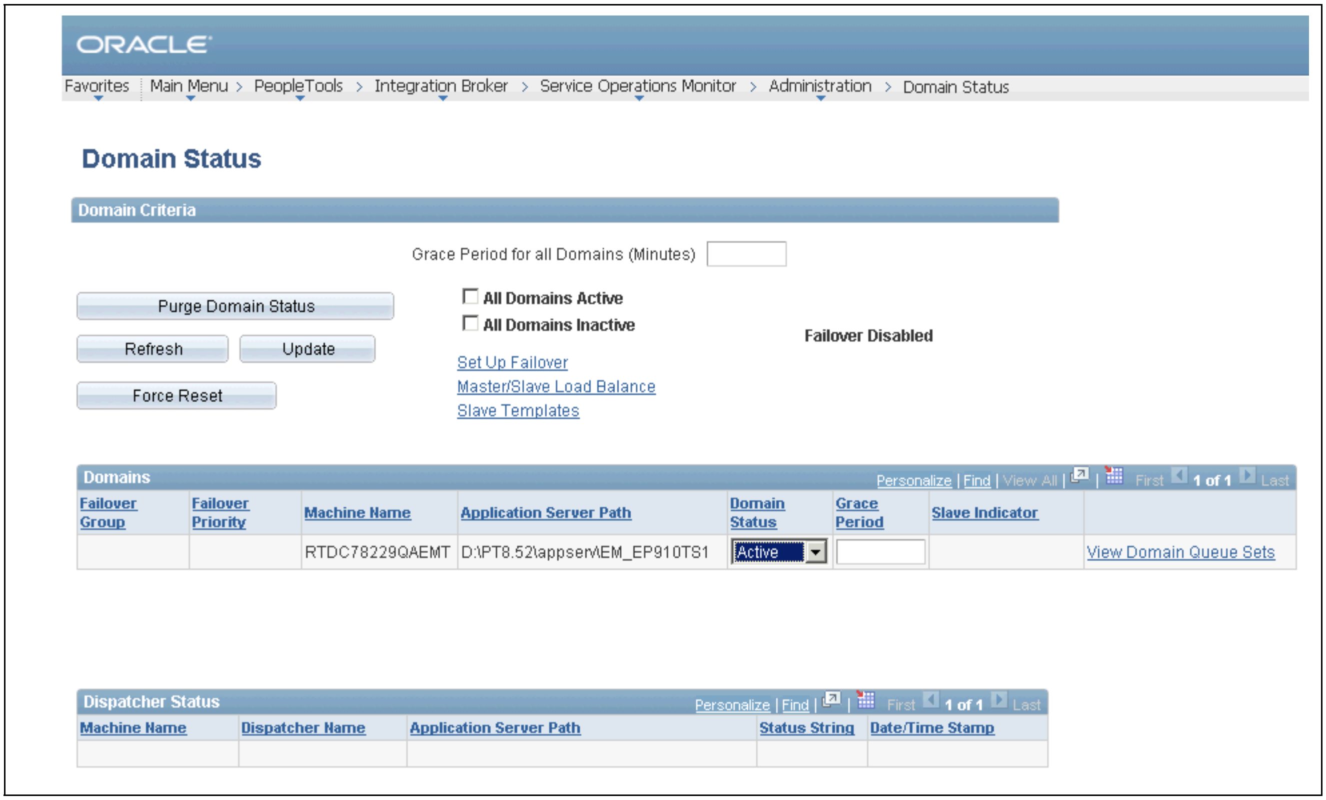
To activate the local domain:

Note. Verify that your PUB server is up and running before you perform this step.

---

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

   The Domain Status page appears, as shown in the following example:



Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. In the Domains group box, in the Domain Status field, select *Active* from the drop-down list box.
4. Click the Update button.

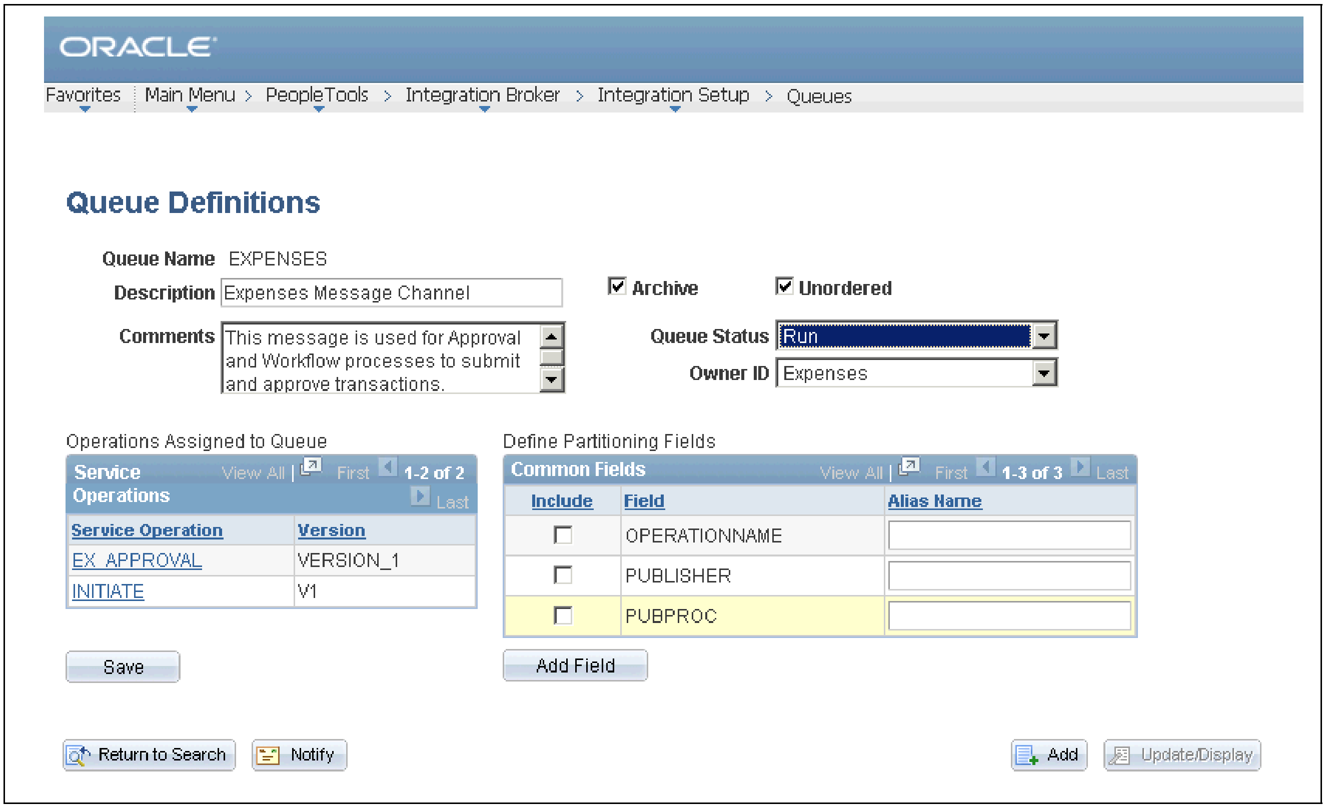
Note. After you click Update, if your machine name does not appear in the Dispatcher Status list, click the Purge Domain Status button and then click the Refresh button.

Task 8-1-3: Activating Queue Definitions

To activate queue definitions:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queue search page, search for and select the queue name *EXPENSES*.

The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

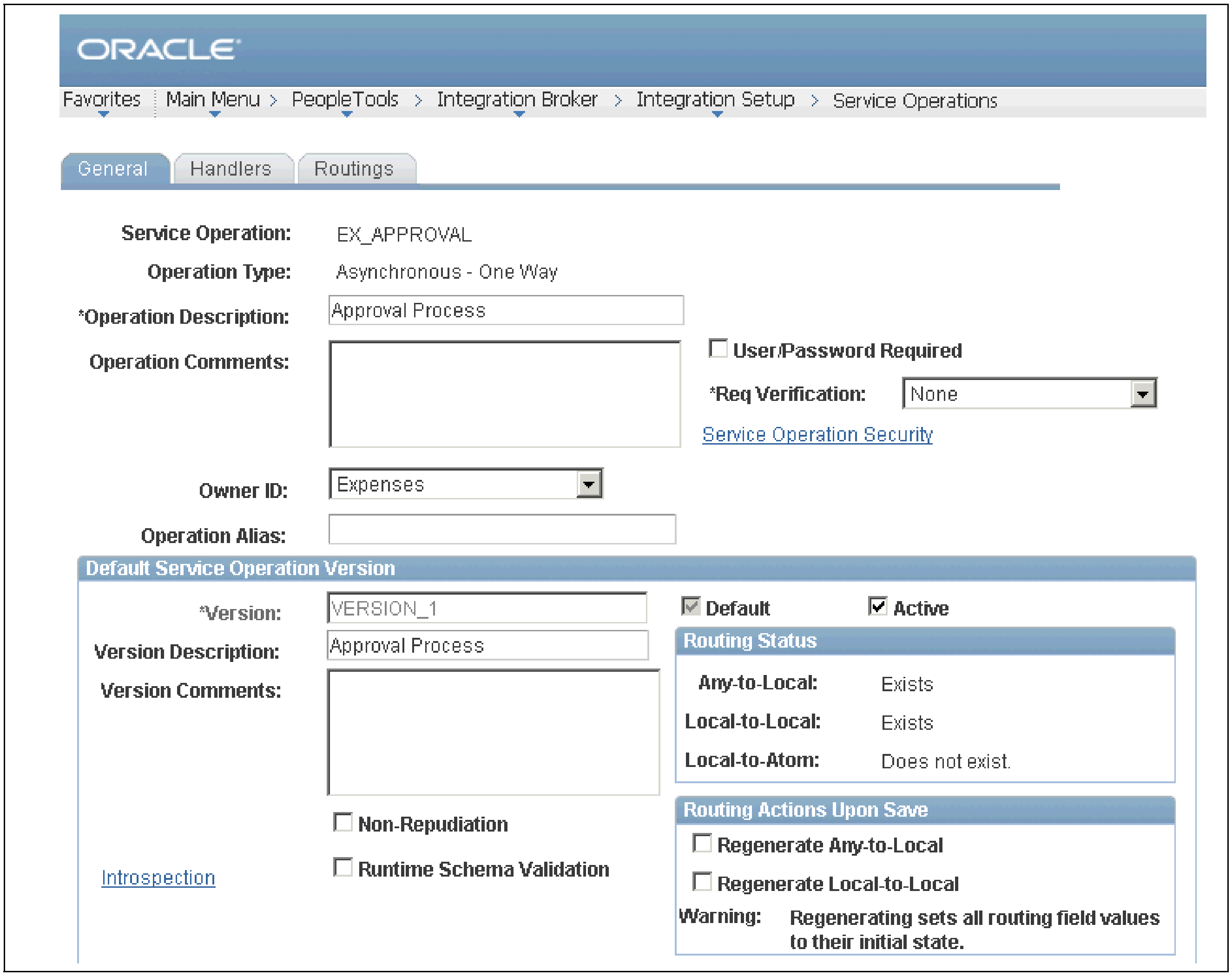
3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.

Task 8-1-4: Setting up Service and Handlers

To set up service and handlers:

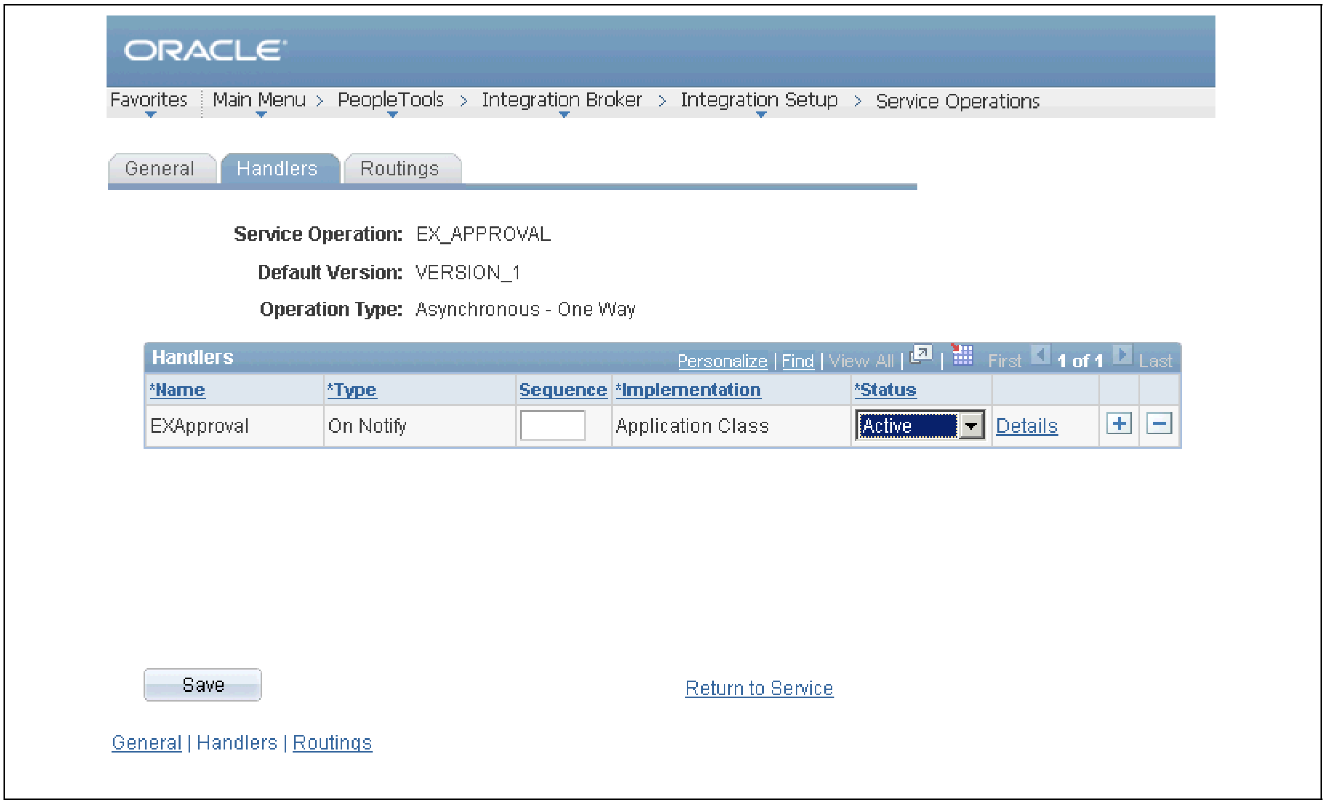
1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operations search page, search for and select the service operation *EX_APPROVAL*.

   The Service Operations - General page appears, as shown in the following example:



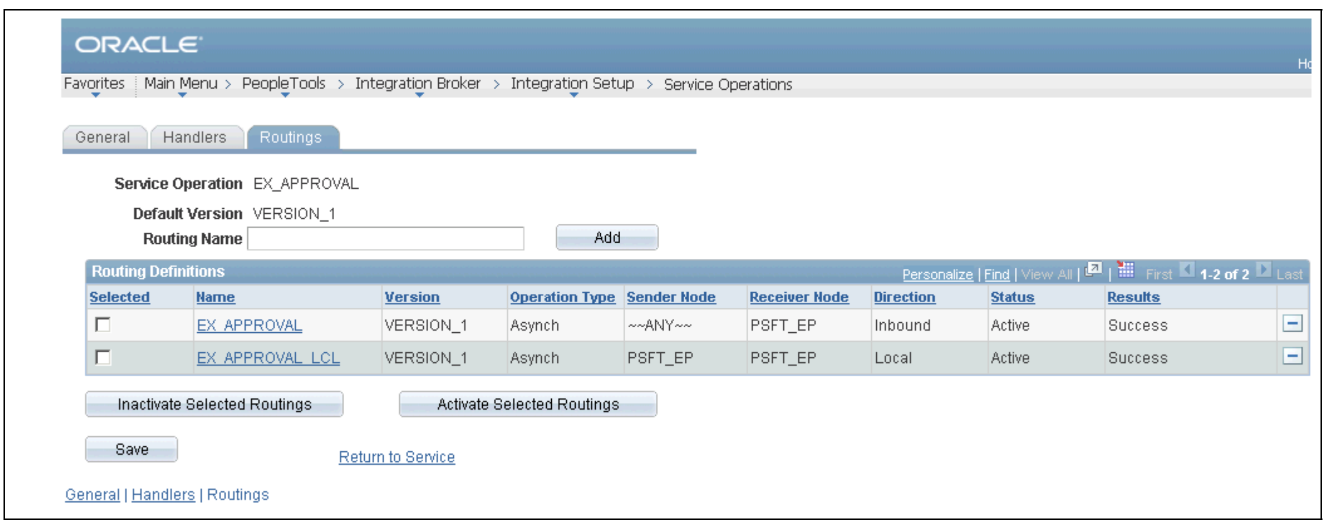
Service Operations - General page

3. On the General page, in the Default Service Operation Version group box, select the *Active* check box.
4. Click Save.
5. Select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations - Handlers page

6. On the Handlers page, in the Status field, select *Active* from the drop-down list box.
7. Click Save.
8. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operations - Routings page

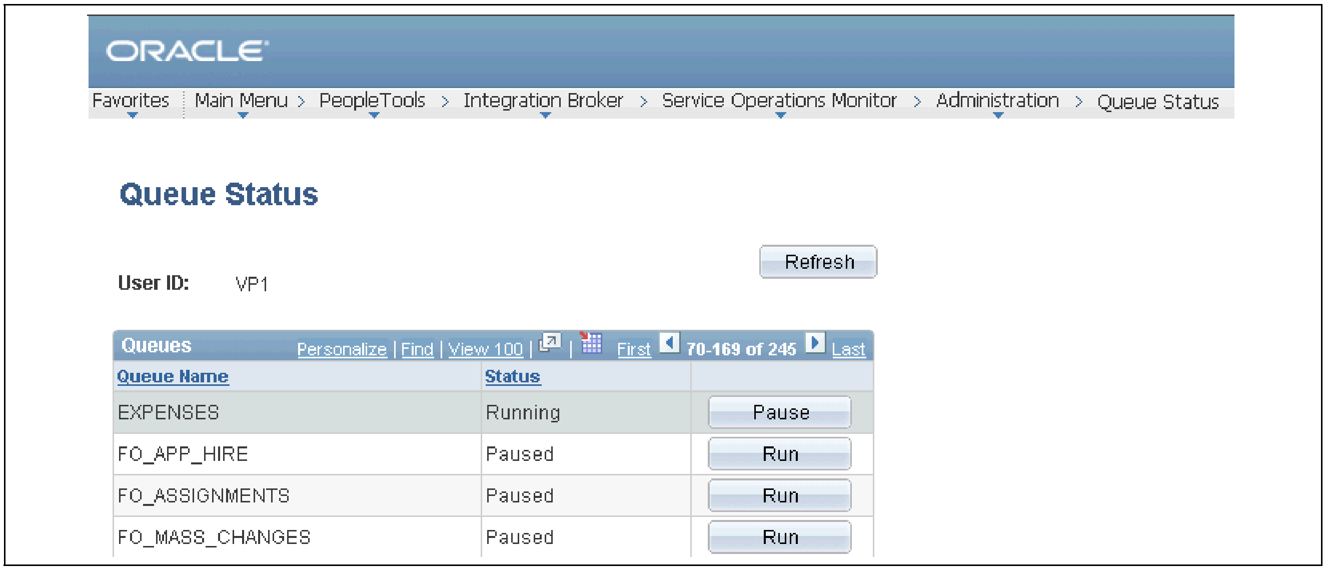
9. On the Routings page, in the Routing Definitions group box, select the check boxes for the routings that you want to activate.
10. Click the Activate Selected Routings button.
11. Click Save.

Task 8-1-5: Verifying the Message Channel Status

To run the message channel:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status.

   The Queue Status page appears, as shown in the following example:



Queue Status page

2. On the Queue Status page, in the Status column, verify that the status for queue name EXPENSES is *Running*.

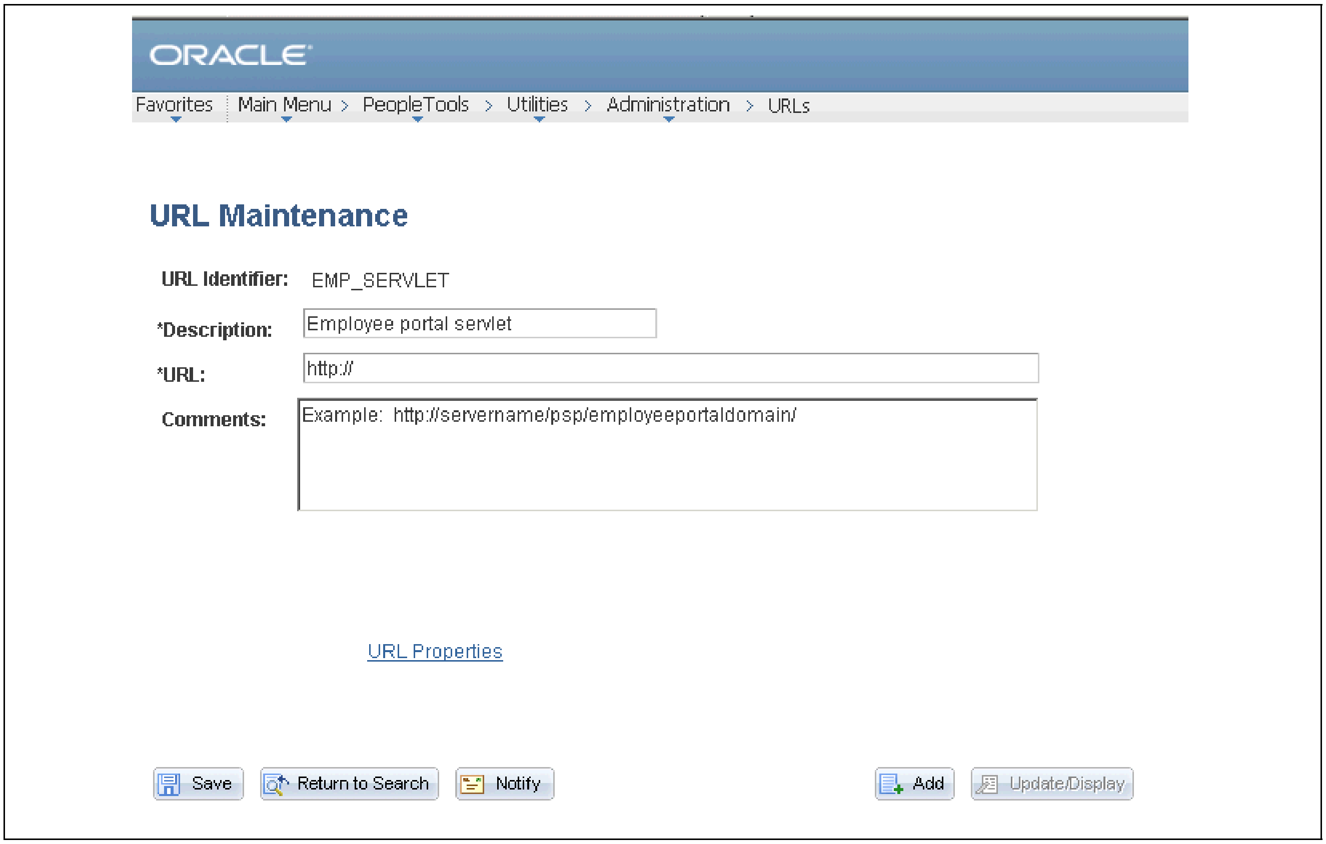
   If the status is *Paused*, click the Run button next to the EXPENSES Status field.

Task 8-2: Configuring the Employee Portal Servlet URL

To configure the URL for the Employee Portal Servlet (EMP_SERVLET):

1. Select PeopleTools, Utilities, Administration, URLs.
2. On the URL search page, search for and select the URL identifier *EMP_SERVLET*.

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



URL Maintenance page

3. On the URL Maintenance page, in the URL field, enter the URL to your machine's server name and append it as follows:

   /psp/<employeeportaldomain>/ where *<employeeportaldomain>* is the site name of your employee portal domain, as shown in the preceding example.

   For example: http://serverx/psp/empdb910

4. Click Save.

Task 8-3: Installing Oracle iReceipts for Your Apple iPhone

This section discusses:

- Prerequisites
- Verifying Correct Namespaces for Messaging
- Setting Up Web Services for My Wallet Transactions
- Setting Up Service Operations for My Wallet Transactions

Prerequisites

Oracle iReceipts is a financial application that enables you to capture cash receipts, create expense lines, and send expense lines to your expense application using a mobile device.

To use the Oracle iReceipts feature in PeopleSoft Expenses 9.1 with your Apple iPhone™, you must comply with the following requirements:

- License and install the PeopleSoft Expenses 9.1 application to allow captured data to be sent to PeopleSoft Expenses and create expense reports.
- Install the required patch to interface Oracle iReceipts with Oracle's PeopleSoft Expenses 9.1.

  This patch is available on My Oracle Support (https://support.oracle.com/CSP/ui/flash.html).
- Ensure that your Apple iPhone™ is running the minimum operating system of 3.0 or higher.
- License and install the Oracle iReceipts application from the Apple iTunes Store to your Apple iPhone™.

For set up and configuration details, refer to the following documentation that is available on My Oracle Support:

See *PeopleSoft Expenses 9.1 PeopleBook*

Task 8-3-1: Verifying Correct Namespaces for Messaging

To set up messaging, you must verify that a correct namespace is entered for the following required messages:

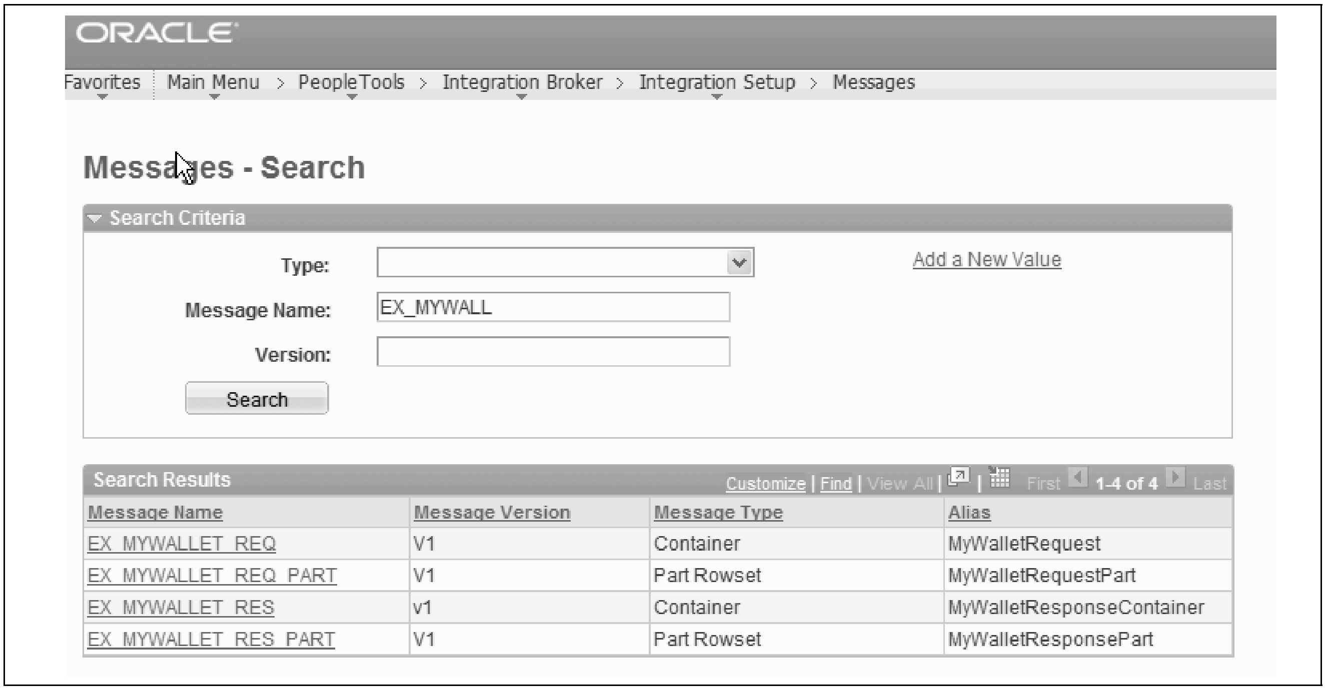
- My Wallet request message (EX_MYWALLET_REQ)
- My Wallet response message (EX_MYWALLET_RES)
- Container message for My Wallet requests (EX_MYWALLET_REQ_PART)
- Container message for My Wallet responses (EX_MYWALLET_RES_PART)

Note. These steps are only required if you are sending expense information from the Oracle iReceipts application on your Apple iPhone™ to PeopleSoft Expenses.

To verify that the correct namespaces are entered for each of the required messages:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. On the Message search page, in the Message Name field, enter *EX_MYWALL* and click Search.

   The Messages search page displays search results for EX_MYWALL in the Search Results grid, as shown in the following example:



Messages search page

The messages that display in the Message Name column of the preceding search results example (EX_MYWALLET_REQ, EX_MYWALLET_REQ_PART, EX_MYWALLET_RES, and EX_MYWALLET_RES_PART) are the four required messages that you must verify correct namespaces.

3. In the Search Results grid, in the Message Name field, click the link for the message EX_MYWALLET_REQ to access the Message Definition - Schema page, as shown in the following example:

Message Definition - Schema page

4. On the Message Definition - Schema page, verify that a correct namespace is entered for the EX_MYWALLET_REQ message.

Note. Namespaces vary according to how each environment is set up. Therefore, it is necessary to enter the correct namespace that is defined specifically for your system. This should be performed for all four messages.

---

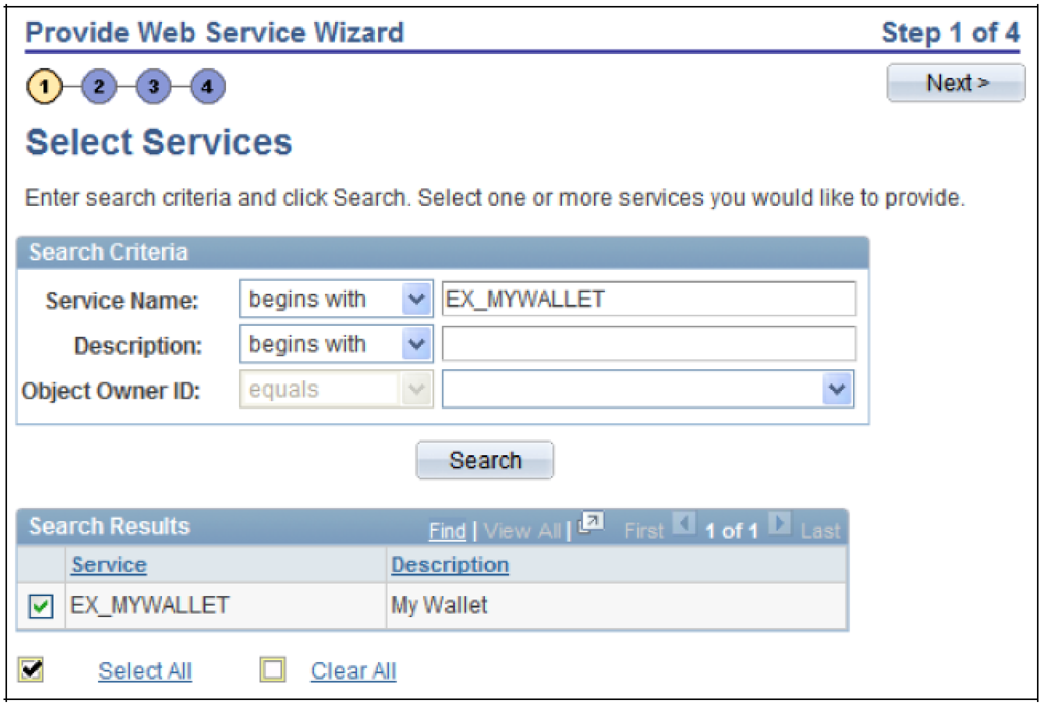
5. Repeat steps 3-4 for each of the four messages (EX_MYWALLET_REQ, EX_MYWALLET_REQ_PART, EX_MYWALLET_RES, and EX_MYWALLET_RES_PART) to verify that correct namespaces are entered.

Task 8-3-2: Setting Up Web Services for My Wallet Transactions

To set up web services for My Wallet transactions:

1. Select PeopleTools, Integration Broker, Web Services, Provide Web Service.

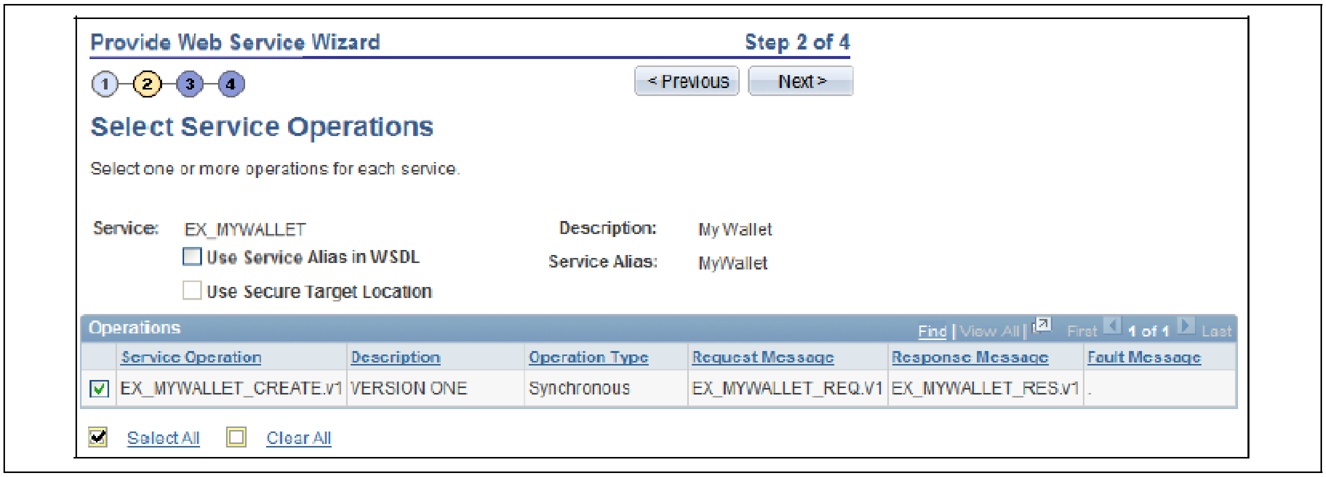
   The Provide Web Service Wizard - Select Services page (Step 1 of 4) appears, as shown in the following example:



Provide Web Service Wizard - Select Services page (Step 1 of 4)

2. In the Service Name field, enter *EX_MYWALLET*.
3. Click Search.
4. In the Service search results, select the check box for the EX_MYWALLET service.
5. Click Next.

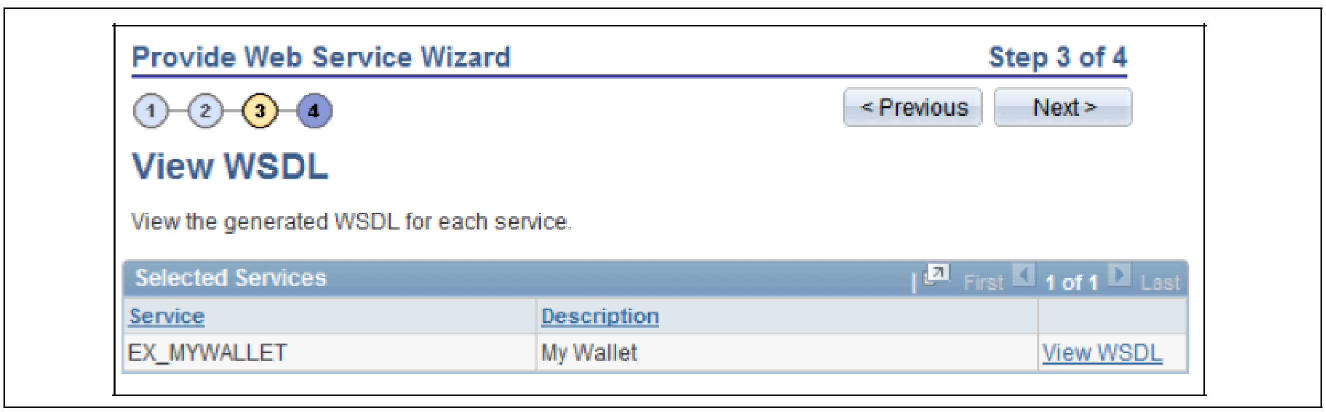
   The Provide Web Service Wizard - Select Service Operations page (Step 2 of 4) appears, as shown in the following example:



Provide Web Service Wizard - Select Service Operations page (Step 2 of 4)

6. In the Operations grid, select the check box for the EX_MYWALLET_CREATE.v1 service operation.
7. Click Next.

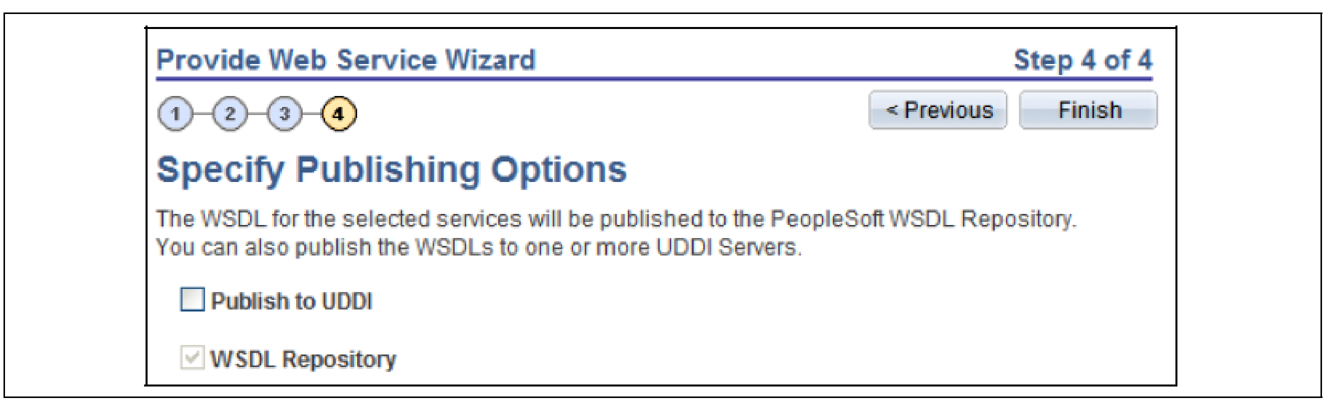
   The Provide Web Service Wizard - View WSDL page (Step 3 of 4) appears, as shown in the following example:



Provide Web Service Wizard - View WSDL page (Step 3 of 4)

8. Click Next.

   The Provide Web Service Wizard - Specify Publishing Options page (Step 4 of 4) appears, as shown in the following example:



Provide Web Service Wizard - Specify Publishing Options page (Step 4 of 4)

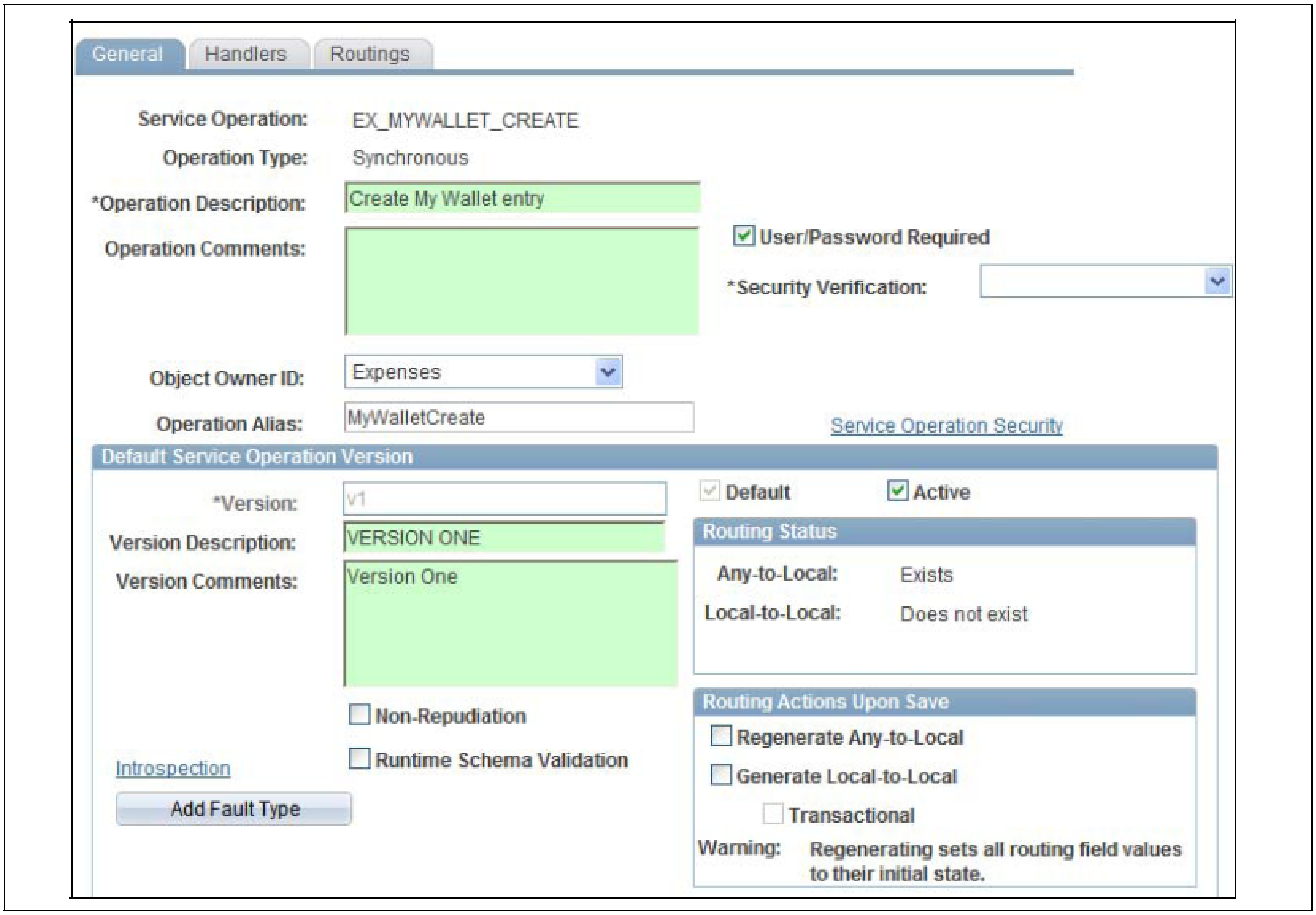
9. Click Finish.

Task 8-3-3: Setting Up Service Operations for My Wallet Transactions

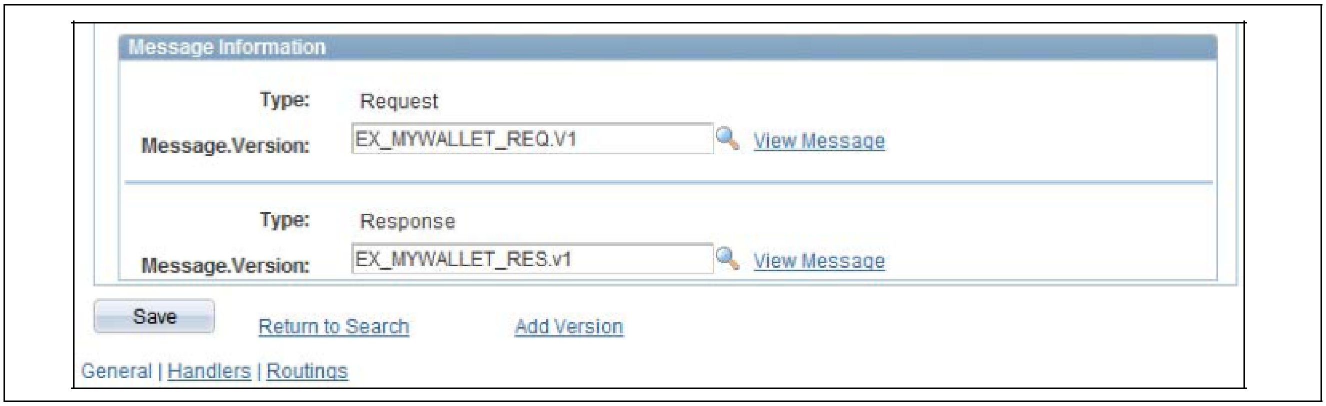
To set up service operations for My Wallet transactions:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. In the Service Operation field, enter *EX_MYWALLET_CREATE*, and then click Search.

   The Service Operations - General page appears, as shown in the following example:



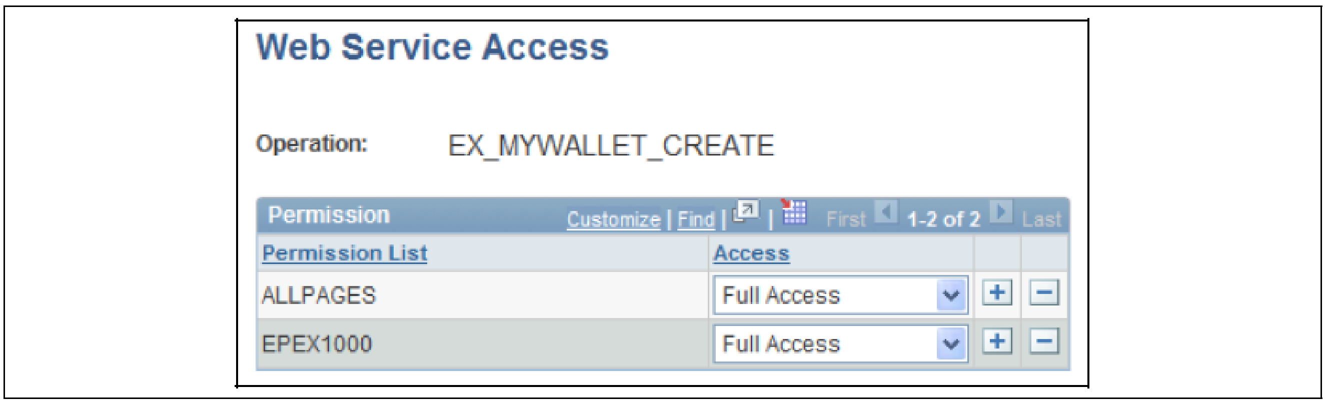
Service Operations - General page 1 of 2



Service Operations - General page 2 of 2

3. Click the Service Operation Security link.

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



Web Service Access page

4. In the Permission grid, click the Add (+) button to add the permission lists that are authorized to access the service operation.

5. Click Save.

CHAPTER 9

Installing PeopleSoft 9.1 Pay/Bill Management

This chapter discusses:

- Understanding PeopleSoft 9.1 Pay/Bill Management
- Prerequisites
- Verifying Integration Points
- Checking the Installation Table for PeopleSoft HCM and PeopleSoft FSCM

Understanding PeopleSoft 9.1 Pay/Bill Management

Oracle delivers all PeopleSoft Pay/Bill Management Enterprise Integration Points with settings enabled for full functionality, with the exception of PeopleSoft Integration Broker web services. When you integrate PeopleSoft Pay/Bill Management with PeopleSoft HRMS, you must activate PeopleSoft Integration Broker web services. For more information, refer to the following:

See *PeopleSoft Pay/Bill Management 9.1 PeopleBook*

See *PeopleTools 8.52: PeopleSoft Integration Broker Administration PeopleBook*

Prerequisites

In this step, you set up node definitions for your PeopleSoft HCM environment.

You must install PeopleSoft Pay/Bill Management 9.1 for PeopleSoft HRMS before you can fully utilize the PeopleSoft Pay/Bill Management application. The complete installation instructions for PeopleSoft Pay/Bill Management for PeopleSoft HRMS are available on My Oracle Support.

See *PeopleSoft Human Resources Management Systems 9.1 Installation Guide.*

Note. PeopleSoft Pay/Bill Management is only supported on Microsoft SQL Server, Oracle and DB2 UDB for Linux, UNIX, and Microsoft Windows.

Task 9-1: Verifying Integration Points

This section discusses:

- Understanding Integration Points Verification

- Setting Up Node Definitions for Single Signon
- Setting Up Portal Nodes
- Setting Up Single Signon
- Setting Up Integration Gateways
- Activating Local Domains
- Activating Queue Definitions
- Setting up the Delivered Service Operations

Understanding Integration Points Verification

In this task, you verify integration points for the PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 (FSCM 9.1 Feature Pack 2) and PeopleSoft Human Capital Management (HCM) environments. Each environment contains both PSFT_EP and PSFT_HR message nodes. You must set both message nodes in both the PeopleSoft FSCM 9.1 Feature Pack 2 and PeopleSoft HCM environments.

PSFT_EP is the default local node in PeopleSoft FSCM, but PSFT_HR also exists in PeopleSoft FSCM. This section details how to set both nodes in the PeopleSoft FSCM environment.

PSFT_HR is the default local node for PeopleSoft HCM, but PSFT_EP also exists in PeopleSoft HCM. This section details how to set both nodes in the PeopleSoft HCM environment.

Note. Verify that your application servers, for both PeopleSoft HRMS and PeopleSoft FSCM installations, are set to manage Pub/Sub server.

Task 9-1-1: Setting Up Node Definitions for Single Signon

Understanding Node Definition Set Up for Single Signon

The PeopleSoft FSCM and PeopleSoft HCM environments contain both message nodes PSFT_EP and PSFT_HR. You must set both message nodes in both environments.

PSFT_EP is the default local node in PeopleSoft FSCM. PSFT_HR also exists in PeopleSoft FSCM and must be set.

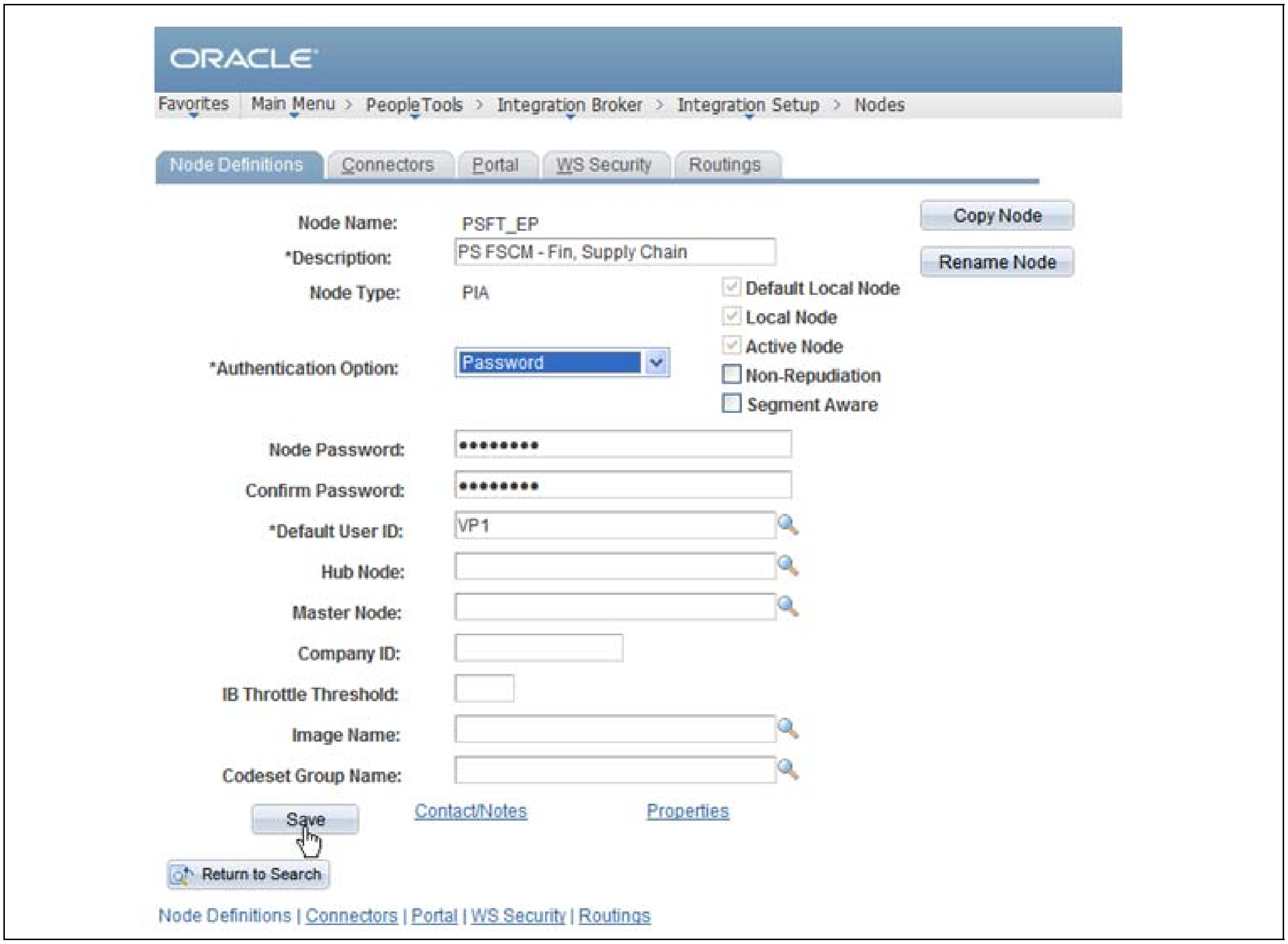
PSFT_HR is the default local node in PeopleSoft HCM. PSFT_EP also exists in PeopleSoft HCM and must be set.

Setting Up Message Node Definitions in PeopleSoft FSCM

To set up message node definitions in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 Feature Pack 2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_EP*.

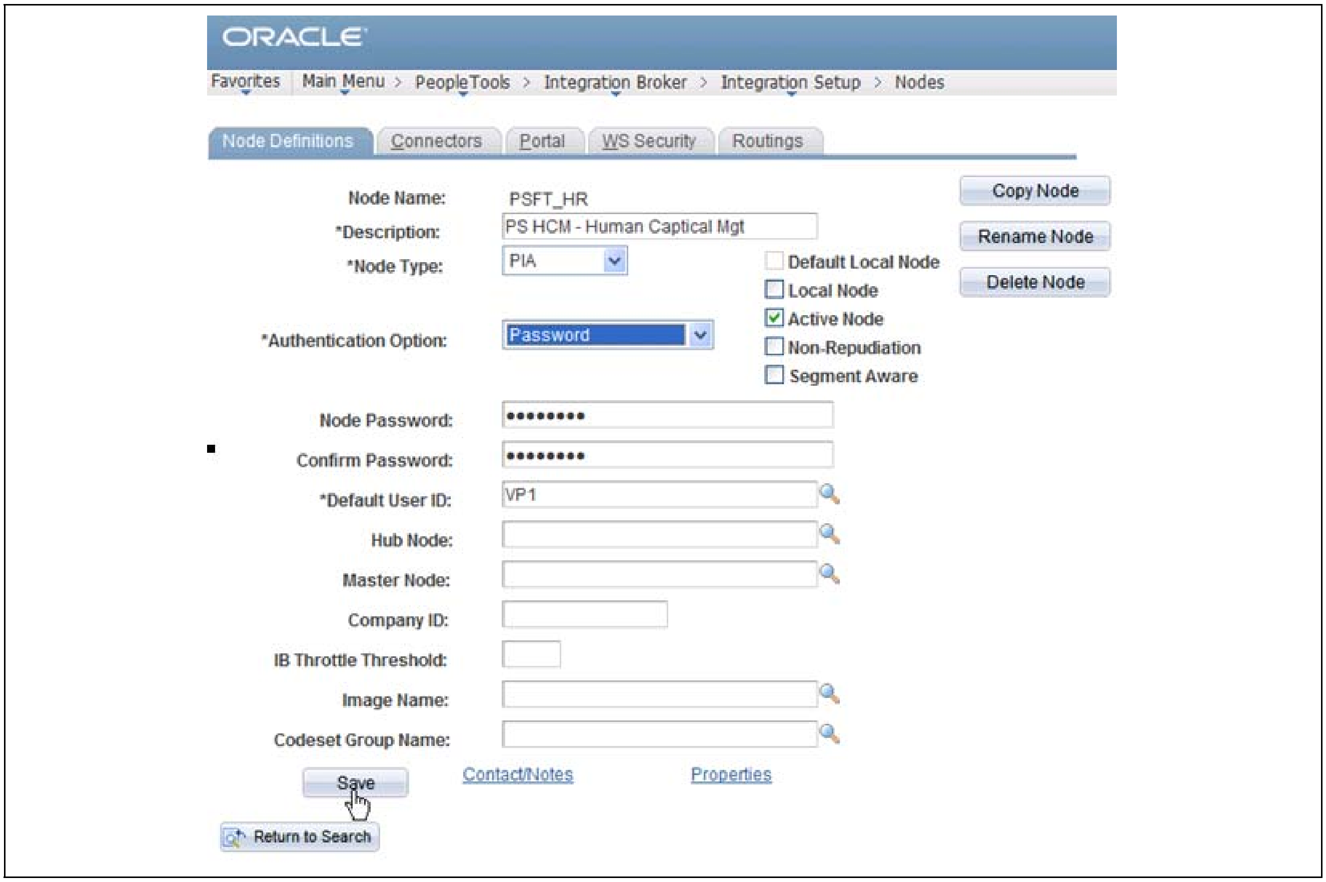
   The Node Definitions page appears, as shown in the following example:



Node Definitions for FSCM - PSFT_ EP Node

3. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
4. In the Node Password field, enter a password.
5. In the Confirm Password field, re-enter the password.
6. Click Save, and then click the Return to Search button.
7. On the Nodes search page, search for and select the node name *PSFT_HR*.

   The Node Definitions page appears, as shown in the following example:



Node Definitions for PeopleSoft FSCM

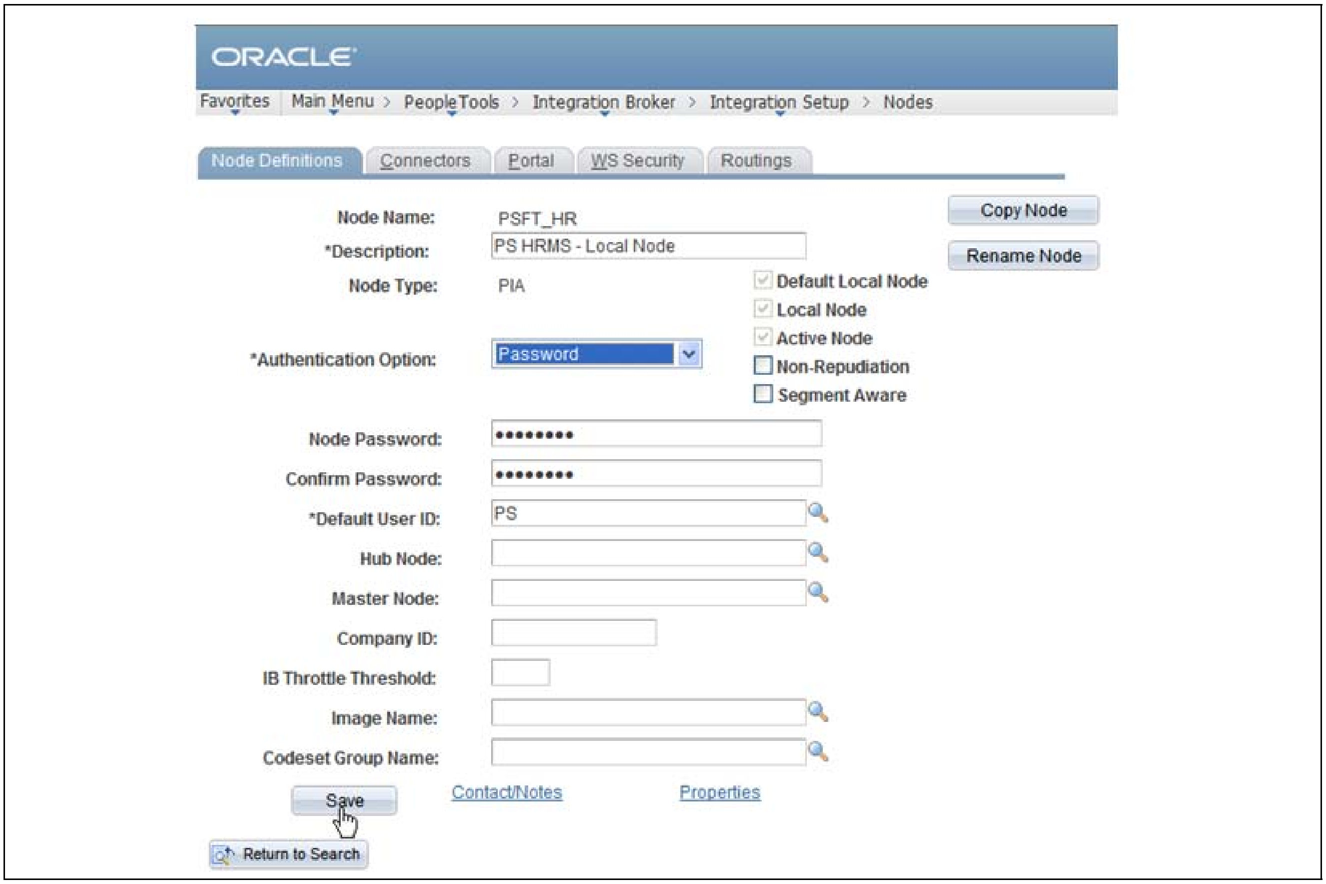
8. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
9. In the Password field, enter a password.
10. In the Confirm Password field, re-enter your password.
11. Click Save.

Setting Up Message Node Definitions in PeopleSoft HCM

To set up message node definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_HR*.

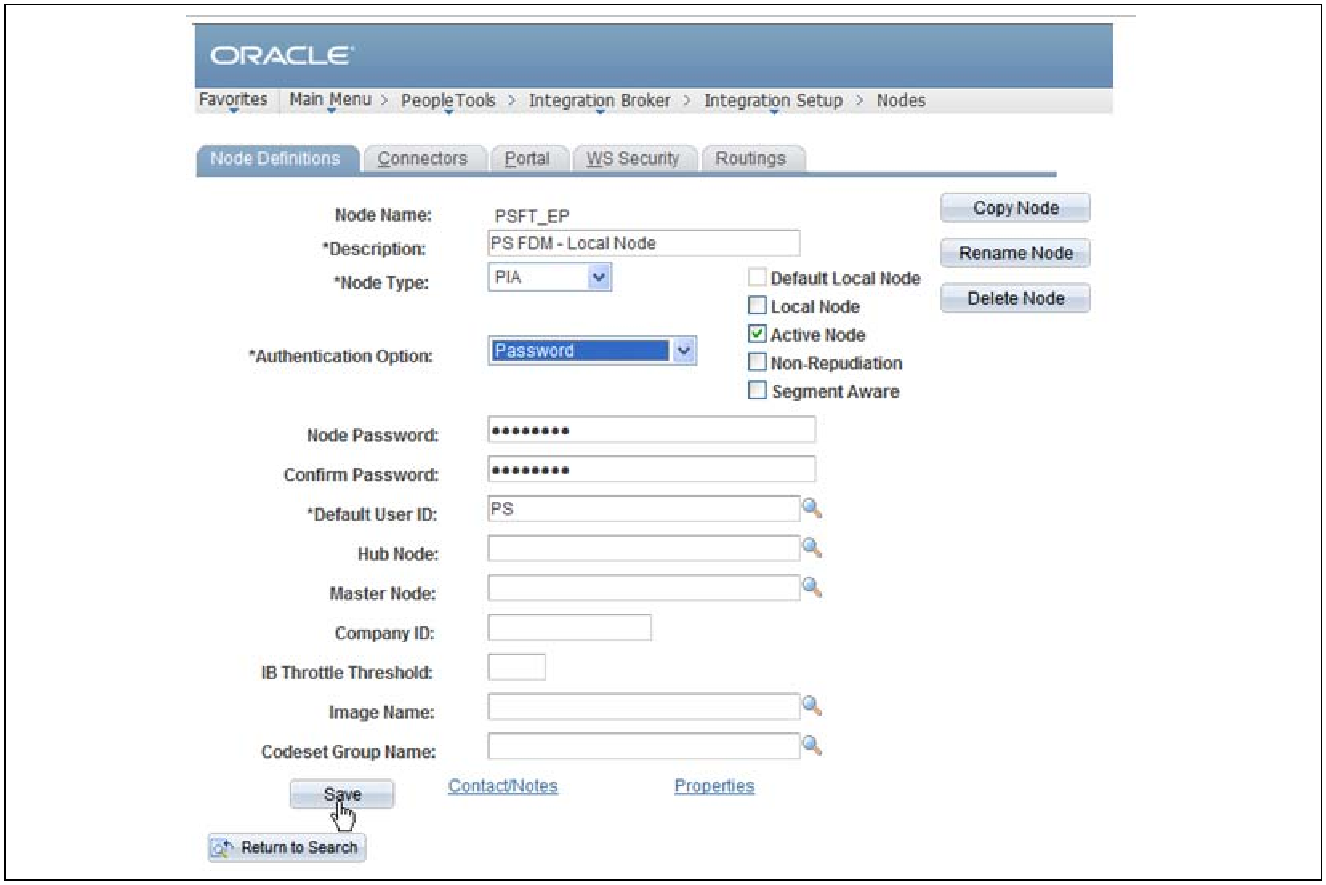
   The Node Definitions page appears, as shown in the following example:



Node Definitions HCM - PSFT_HR node

3. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
4. In the Node Password field, enter a password.
5. In the Confirm Password field, re-enter your password.
6. Click Save, and then click Return to Search.
7. On the Node search page, search for and select the node name *PSFT_EP*.

   The Node Definitions page appears, as shown in the following example:



Node Definitions for HCM - PSFT_EP node

8. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
9. In the Node Password field, enter a password.
10. In the Confirm Password field, re-enter your password.
11. Click Save.

Task 9-1-2: Setting Up Portal Nodes

Understanding Portal Node Set Up

The PeopleSoft FSCM and PeopleSoft HCM environments contain both ERP and HRMS portal nodes. You must set both portal nodes in both environments.

ERP is the local node in PeopleSoft FSCM. HRMS also exists in PeopleSoft FSCM and must be set.

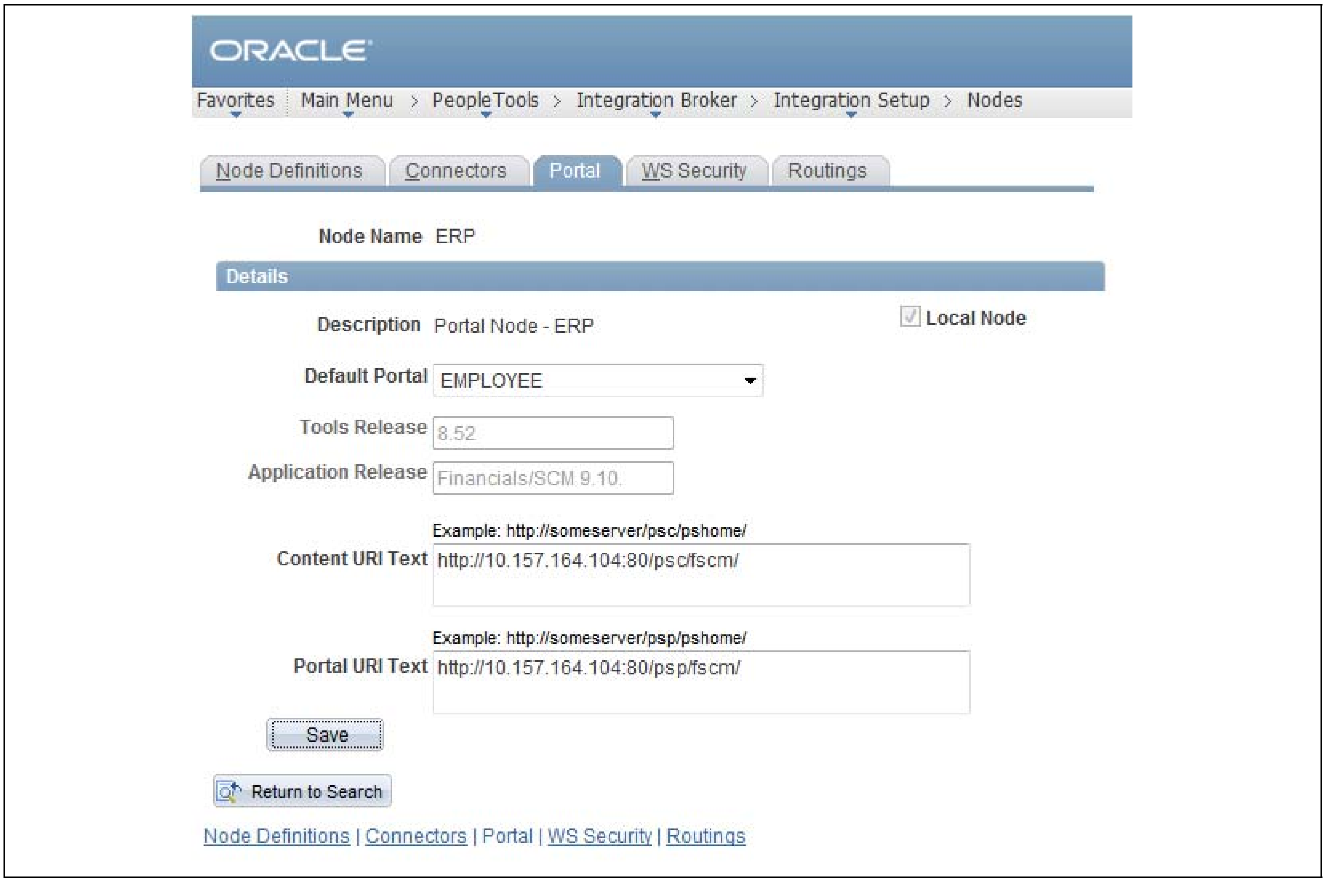
HRMS is the local node in PeopleSoft HCM. ERP also exists in PeopleSoft HCM and must be set.

Setting Up Portal Nodes in PeopleSoft FSCM

To setup Portal Node Definitions in the PeopleSoft FSCM environment:

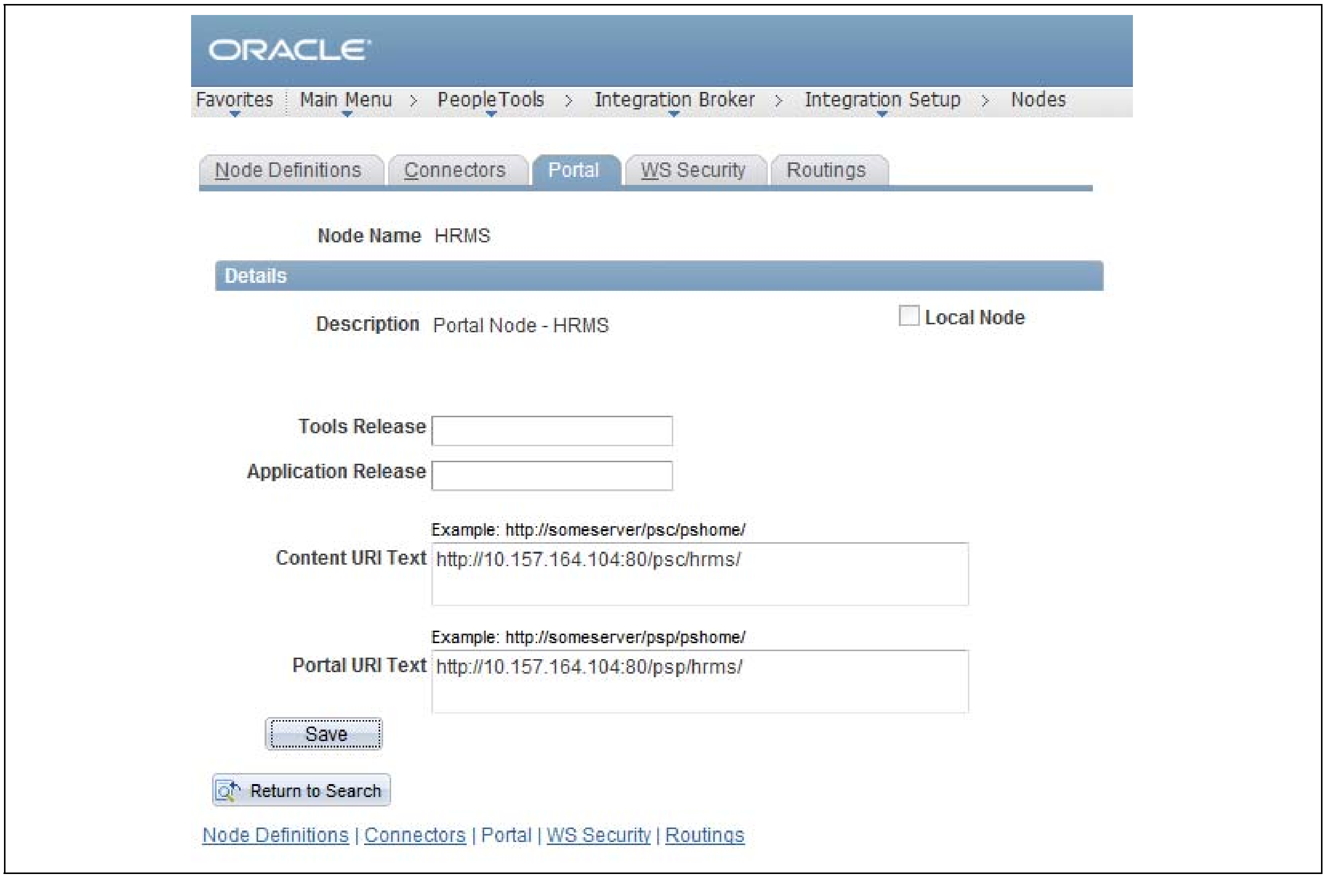
1. In your PeopleSoft FSCM 9.1 Feature Pack 2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *ERP*.

3. On the Node Definitions page, select the Portal tab to access the Portal page for the ERP node, as shown in the following example:



Portal Node page for FSCM - ERP

4. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM environment.
5. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM environment.
6. Click Save.
7. Click Return to Search.
8. On the Node search page, search for and select the node name *HRMS*.
9. On the Node Definitions page, select the Portal tab to access the Portal page for the HRMS node, as shown in the following example:



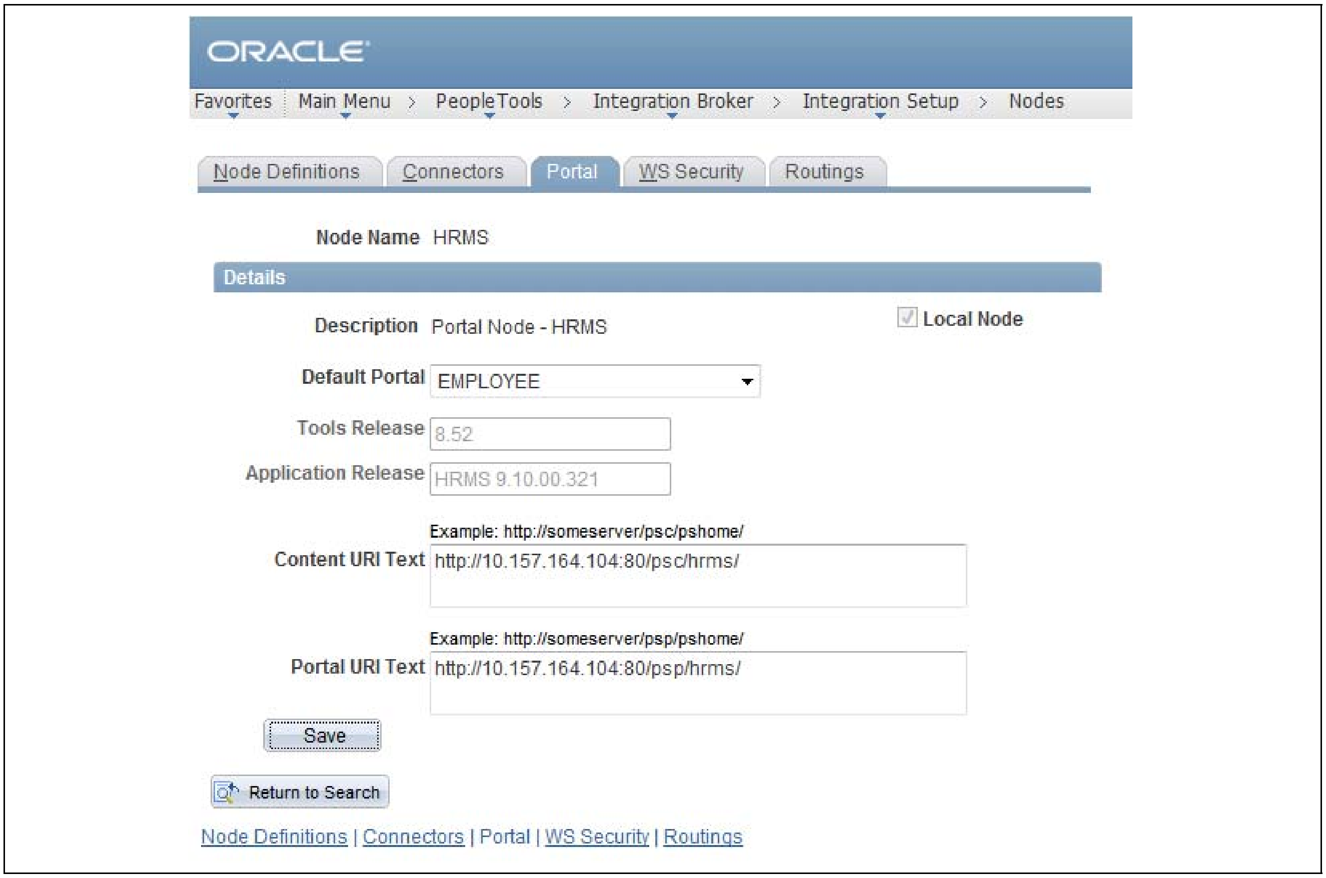
Portal Node page for FSCM - HRMS

10. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft HCM environment.
11. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft HCM environment.
12. Click Save.

Setting Up Portal Nodes in PeopleSoft HCM

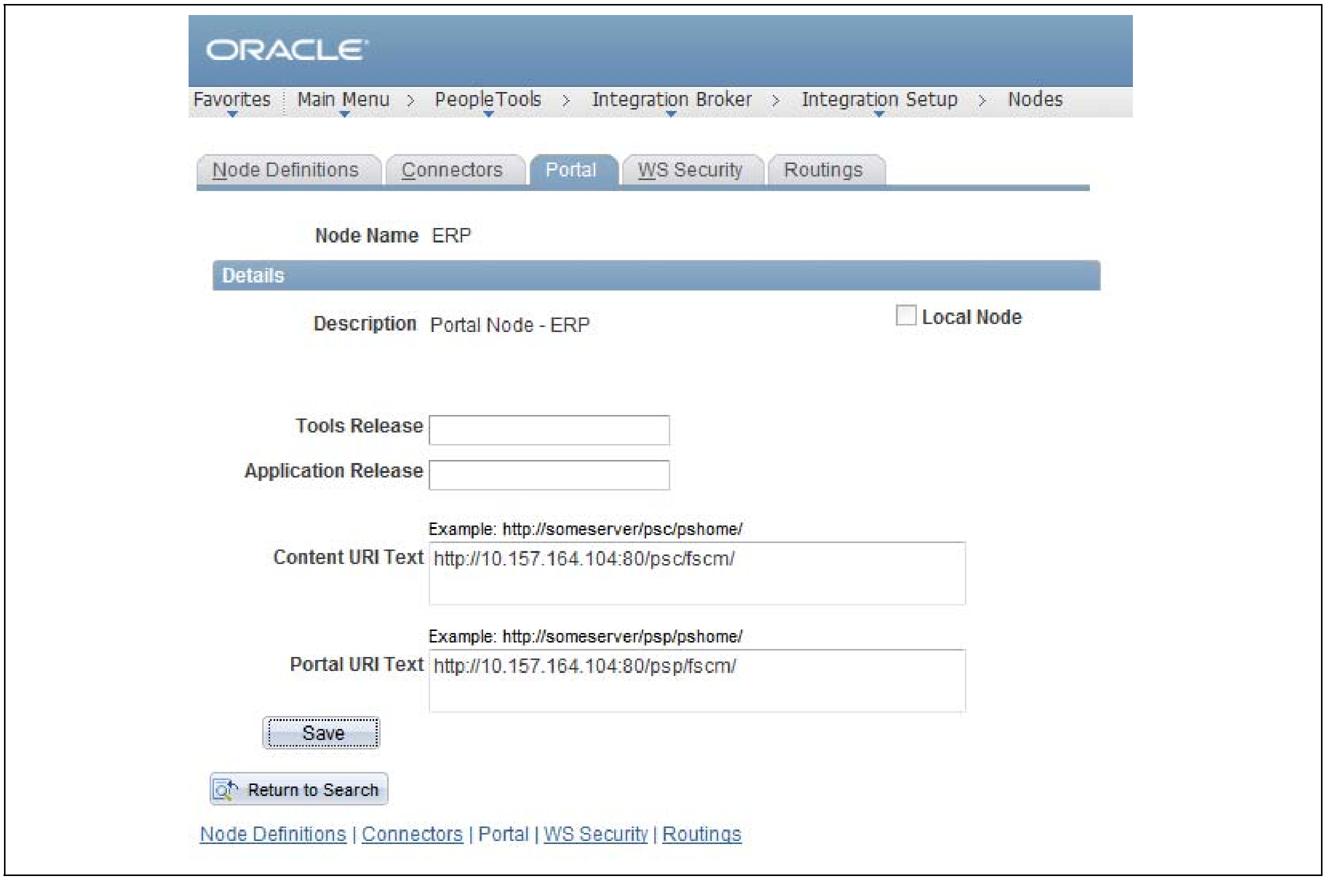
To setup Portal Node Definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *HRMS*.
3. On the Node Definitions page, select the Portal tab to access the Portal page for the HRMS node, as shown in the following example:



Portal Node page for HCM - HRMS

4. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft HCM environment.
5. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft HCM environment.
6. Click Return to Search.
7. On the Node search page, search for and select the node name *ERP*.
8. On the Node Definitions page, select the Portal tab to access the Portal page for the ERP node, as shown in the following example:



Portal Node page for HCM - ERP

9. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM environment.
10. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM environment.
11. Click Save.

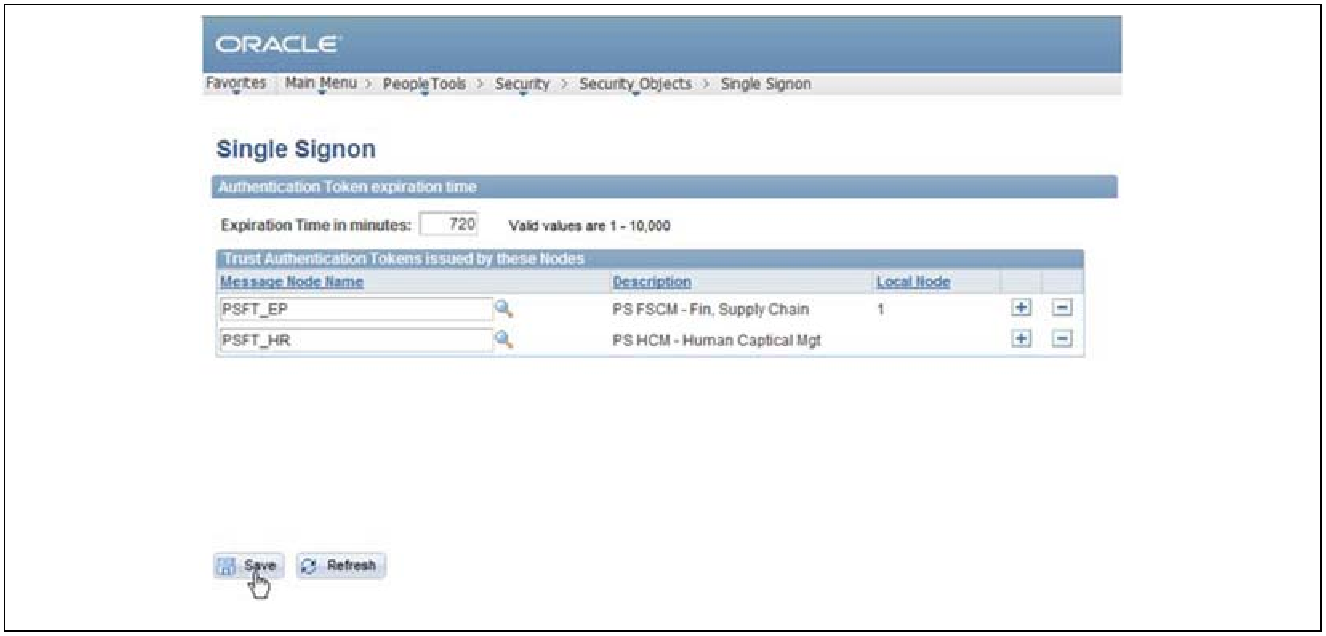
Task 9-1-3: Setting Up Single Signon

Setting Up Single Signon in PeopleSoft FSCM

To verify Single Signon in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 Feature Pack 2 environment, select PeopleTools, Security, Security Objects, Single Signon.

   The Single Signon page appears, as shown in the following example:



Single Signon page

2. On the Single Signon page, in the *Trust Authentication Tokens issued by these nodes* group box, inform the message nodes PSFT_EP and PSFT_HR.
3. Click Save.

Setting Up Single Signon in PeopleSoft HCM

To verify Single Signon in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Security, Security Objects, Single Signon.
2. On the Single Signon page, in the *Trust Authentication Tokens issued by these nodes* group box, inform the message nodes PSFT_EP and PSFT_HR.
3. Click Save.

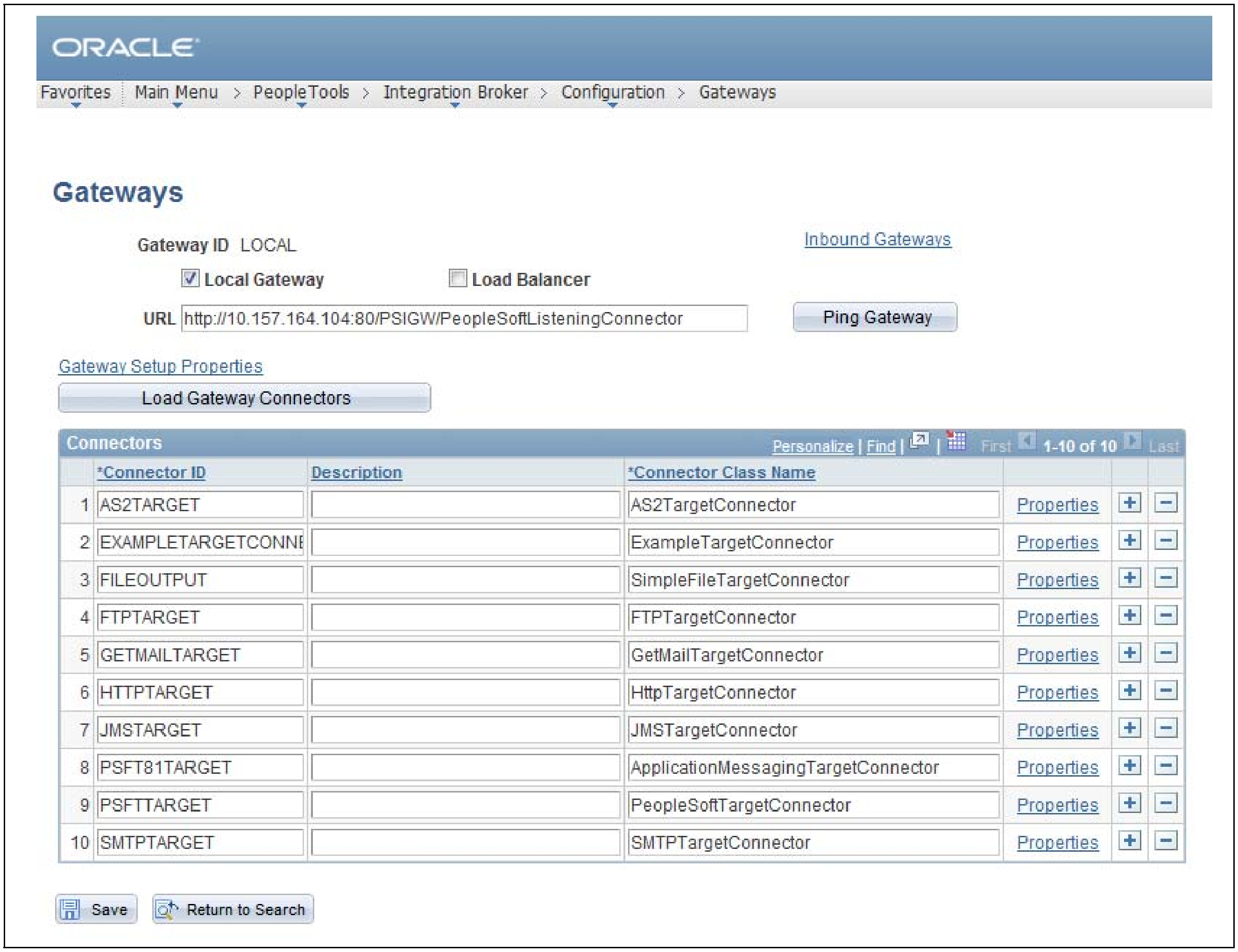
Task 9-1-4: Setting Up Integration Gateways

Setting Up Integration Gateway in PeopleSoft FSCM

To set up Integration Gateways in the PeopleSoft FSCM environment:

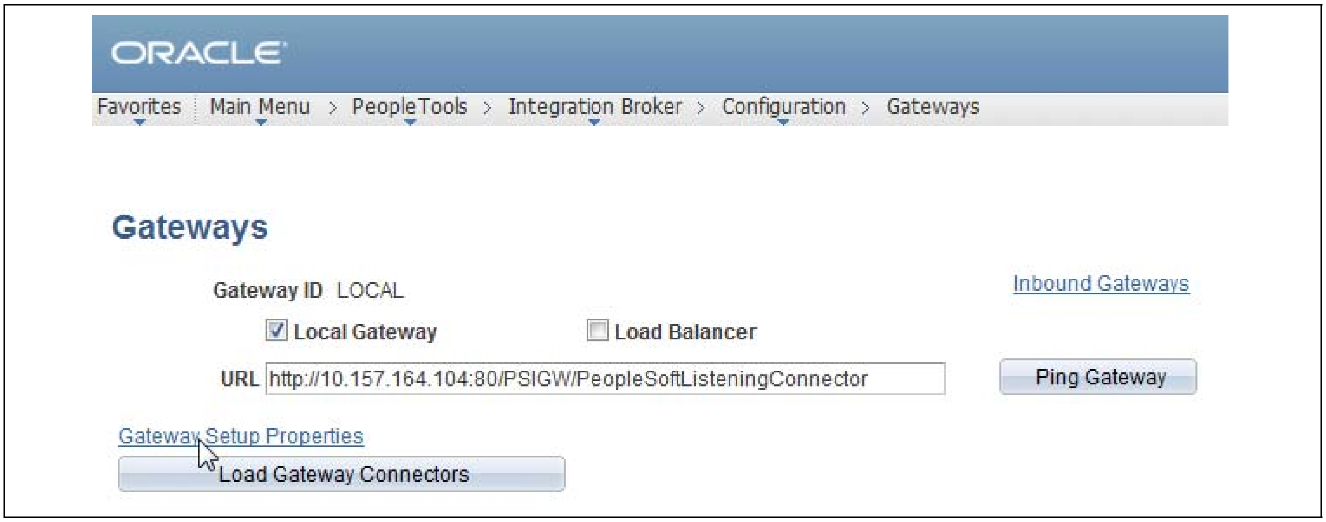
1. In your PeopleSoft FSCM 9.1 Feature Pack 2 environment, select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search.

   The Gateways page for the local gateway automatically appears by default, as shown in the following example:



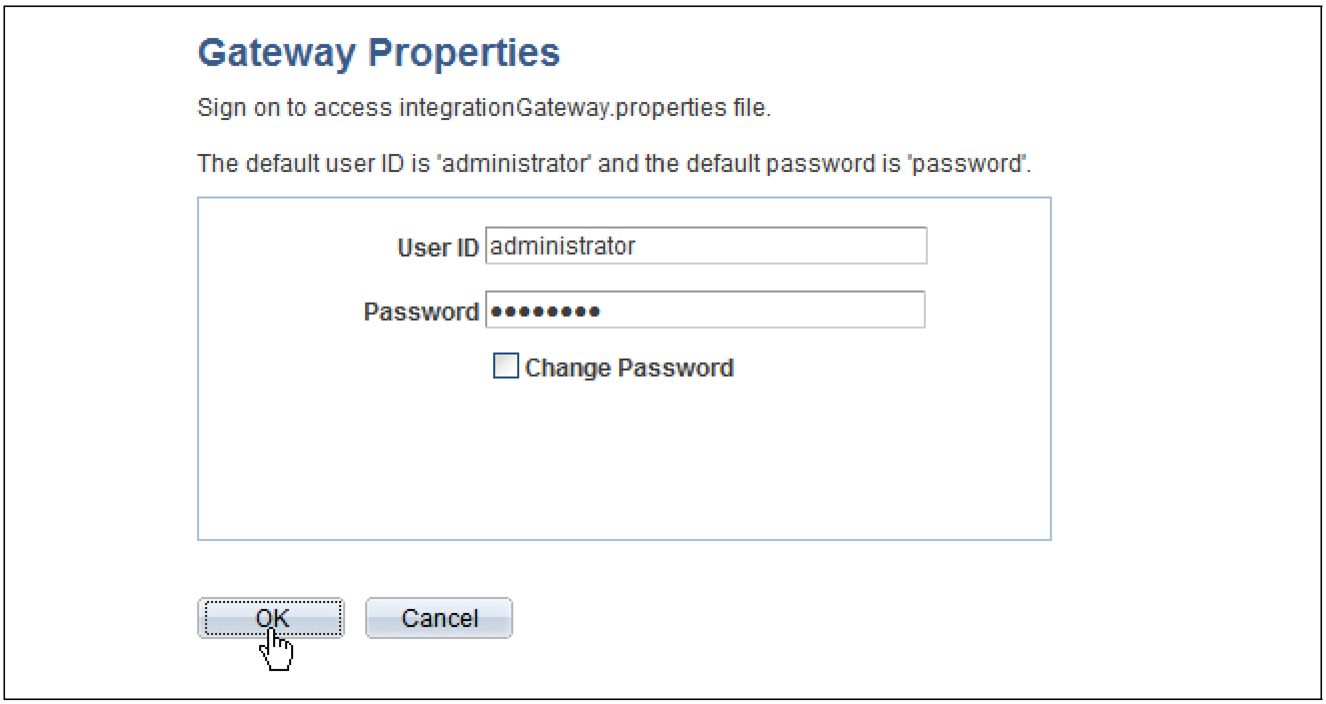
Gateways page

3. On the Gateways page, in the URL field, enter *http://<IBHostname>:<port>/PSIGW /PeopleSoftListeningConnector* for the local gateway URL.
4. Click the Load Gateway Connectors button.
5. Click Save.
6. Click Ping Gateway to ensure connectivity and proper configuration.
7. Click the Gateway Setup Properties link, as shown in the following example:



Gateway Setup Properties page

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



Gateway Properties Signon page

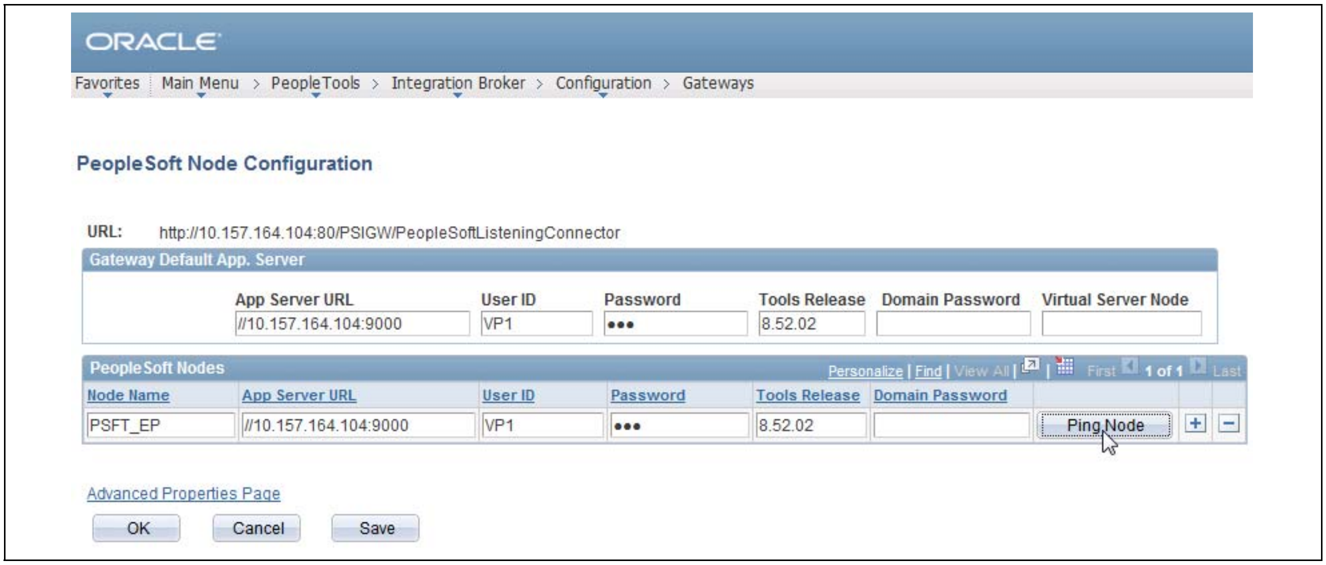
8. On the Gateway Properties sign on page, enter the following:

Note. The User ID and password are case sensitive.

- In the User ID field, enter *administrator*.
- In the Password field, enter *password*.

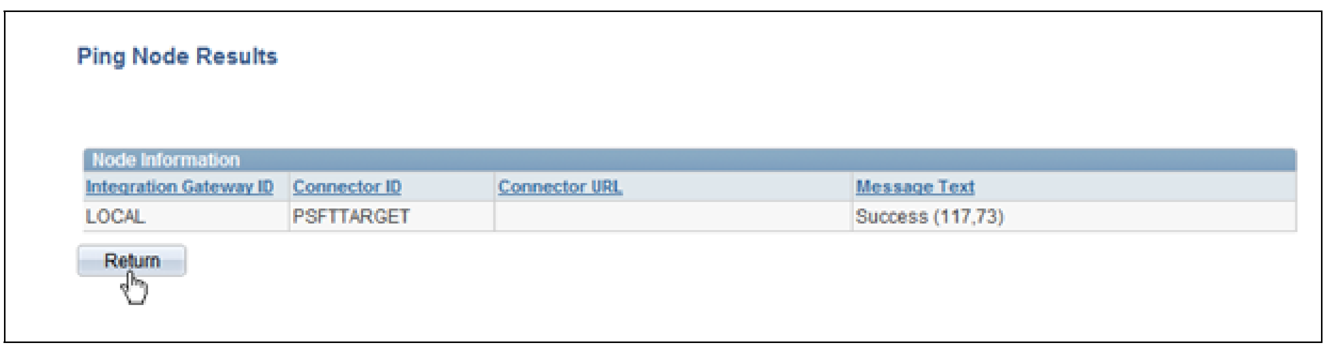
9. Click OK.

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



PeopleSoft Node Configuration page

10. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:
    - App Server URL
    - User ID
    - Password
    - Tools Release (PeopleTools Release)
11. You must add both the PSFT_EP node and the PSFT_HR node in the PeopleSoft FSCM application (PSFT_EP with FSCM data and PSFT_HR with HRMS data). Add the required nodes by doing the following:
    a. Click the Add (+) button to add the node *PSFT_EP* (the PeopleSoft FSCM application server node).
    b. Click the Add (+) button to add the node *PSFT_HR* (the PeopleSoft HCM application server node).
12. In the Tools Release field, enter the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway, as it must match exactly.
13. Click Save.
14. Click the Ping Node button to ping the PSFT_EP node and verify that it is responding.
15. If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results

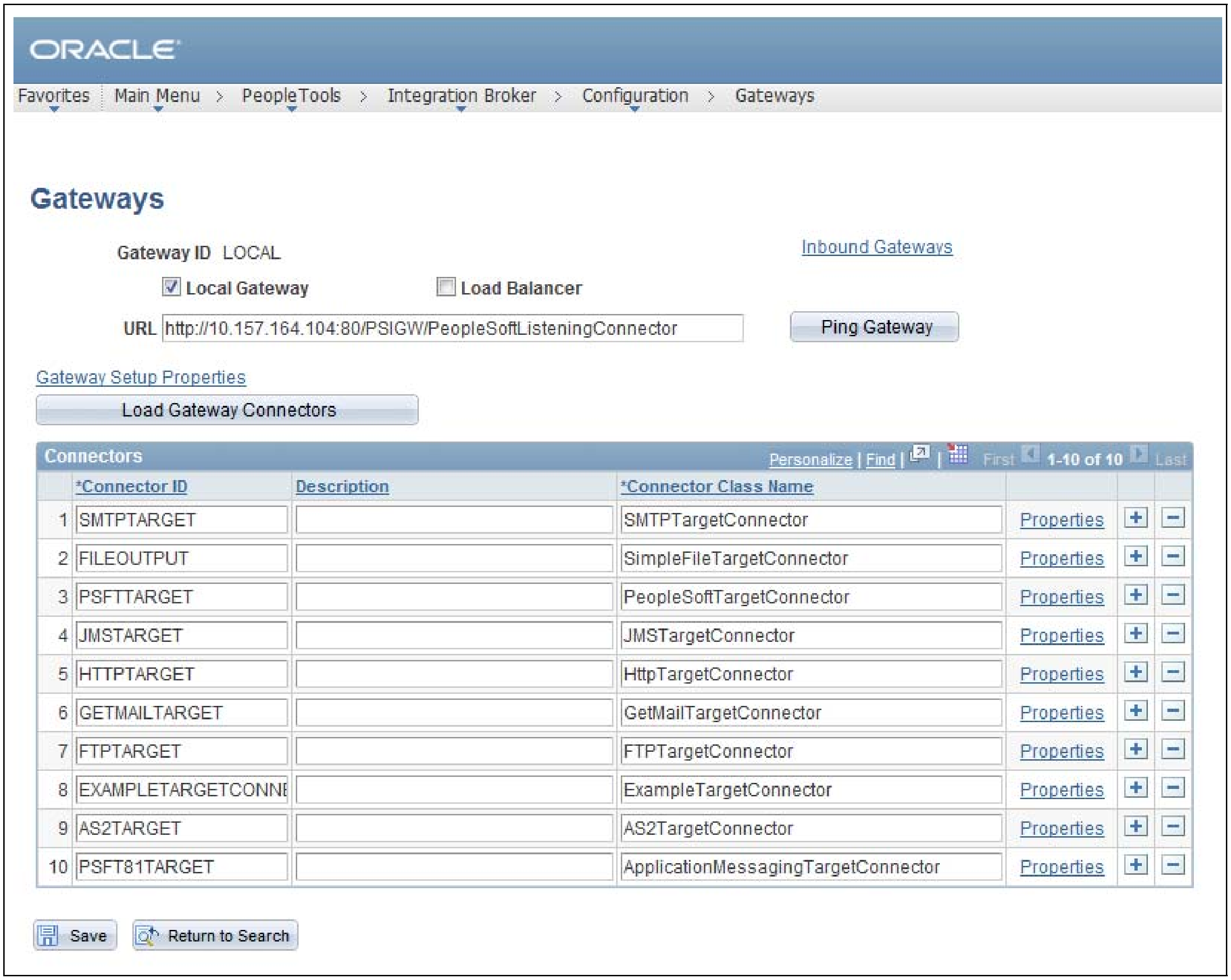
16. Click Return.

Setting Up Integration Gateway in PeopleSoft HCM

To set up the Integration Gateway in the PeopleSoft HCM environment:

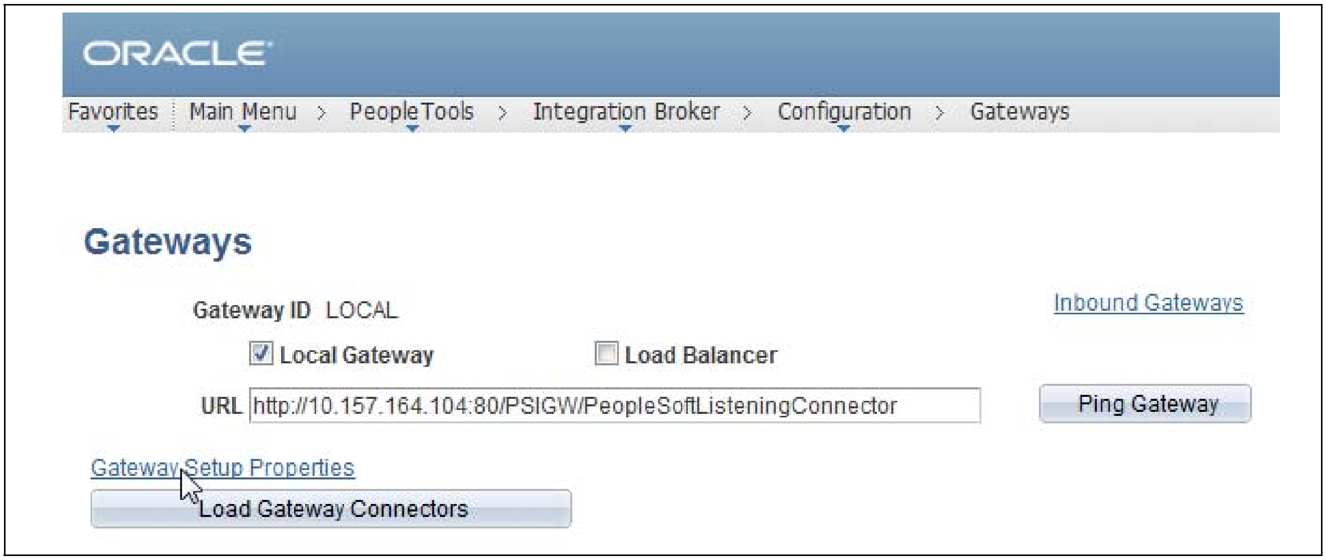
1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click search.

   The Gateways page for the local gateway automatically appears by default, as shown in the following example:



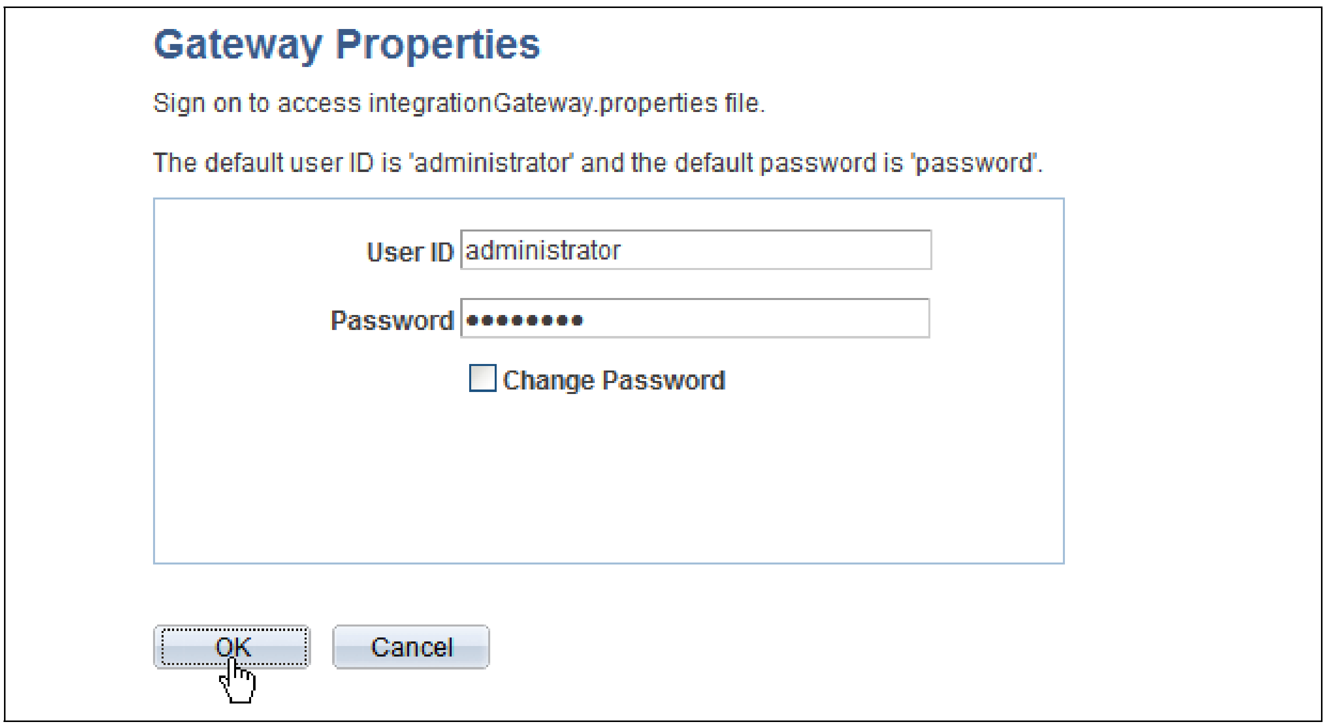
Gateways page

3. On the Gateways page, in the URL field, enter *http://<IBHostname>:<port>/PSIGW /PeopleSoftListeningConnector* for the local gateway URL.
4. Click the Load Gateway Connectors button.
5. Click Save.
6. Click the Ping Gateway button to ensure connectivity and proper configuration.
7. Click the Gateway Setup Properties link, as shown in the following example:



Gateways page - Gateways Setup Properties link

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



Gateway Properties sign on page

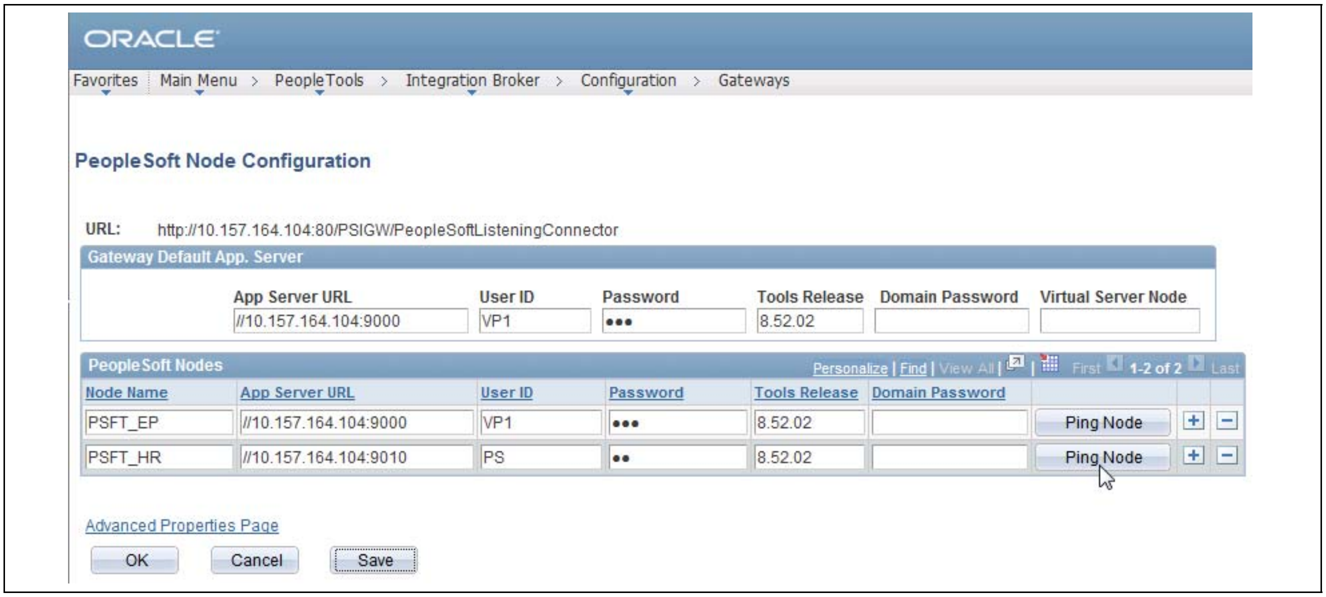
8. On the Gateways Properties sign on page, enter values for the following fields:

Note. The User ID and password fields are case sensitive.

- In the User ID field, enter *adminstrator*.
- In the Password field, enter *password*.

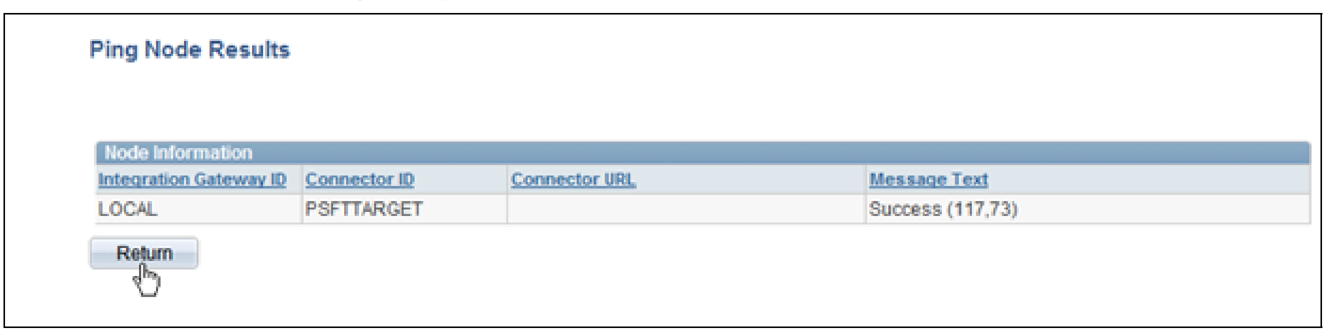
9. Click OK.

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



PeopleSoft Node Configuration page

10. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:
    - App Server URL
    - User ID
    - Password
    - Tools Release (PeopleTools Release)
11. You must add both the PSFT_EP node and the PSFT_HR node in the PeopleSoft HRMS application (PSFT_EP with FSCM data and PSFT_HR with HRMS data). Add the required nodes by doing the following:
    a. Click the Add (+) button to add the node PSFT_HR (the PeopleSoft HCM application server node).
    b. Click the Add (+) button to add the node PSFT_EP (the PeopleSoft FSCM application server node).
12. In the Tools Release field, enter the number that you obtained when you pinged the gateway, as it must match exactly.
13. Click Save.
14. Click the Ping Node button to ping the PSFT_HR node and verify that it is responding.
15. If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results page

16. Click Return.

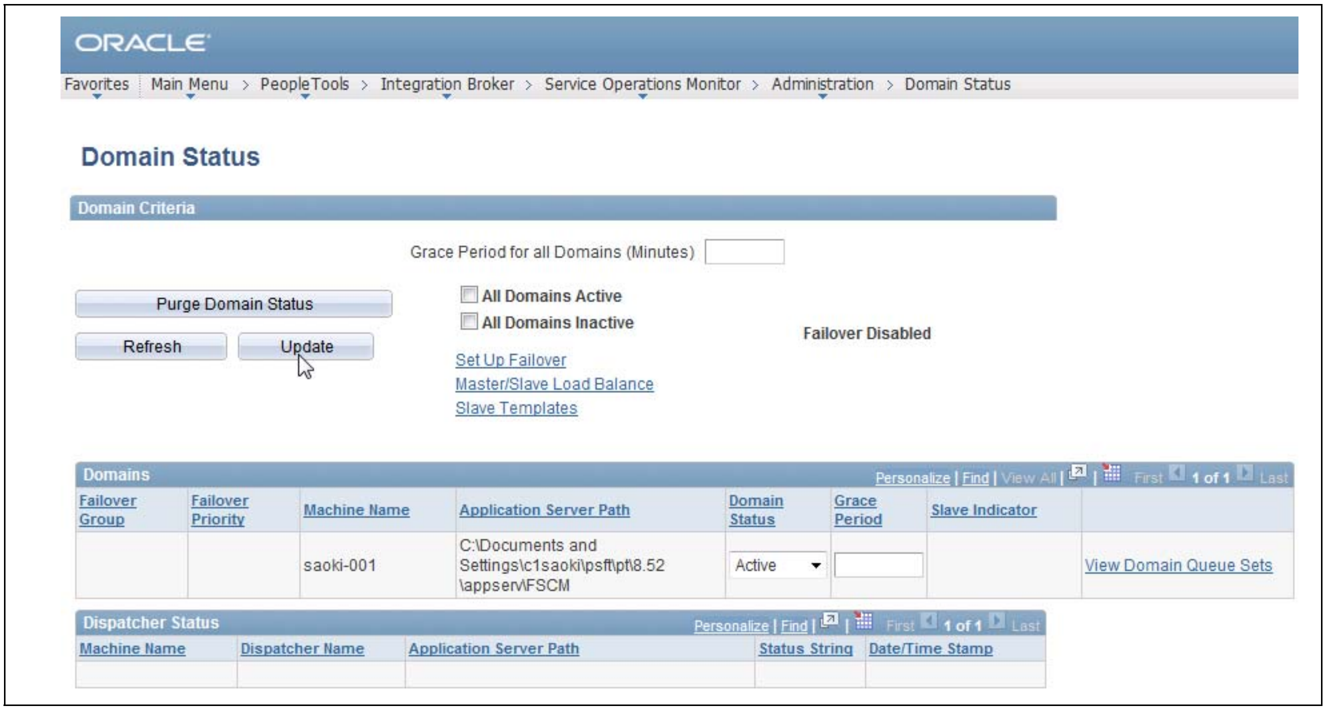
Task 9-1-5: Activating Local Domains

Activating the Local Domain in PeopleSoft FSCM

To activate the Local Domain in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 Feature Pack 2 environment, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

   The Domain Status page appears, as shown in the following example:



Domain Status page

2. On the Domain Status page, in the Domains Status field, select *Active* from the drop-down list box.
3. Click Update.

Note. After you click Update, if your machine name does not appear in this list, click the Purge Domain Status button and then click the Refresh button.

Activating the Local Domain in PeopleSoft HCM

To activate the Local Domain in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
2. On the Domain Status page, in the Domains Status field, select *Active* from the drop-down list box.
3. Click Update.

Note. After you click Update, if your machine name does not appear in this list, click the Purge Domain Status button and then click the Refresh button.

Task 9-1-6: Activating Queue Definitions

Understanding Queue Definitions

The following Queue Definitions must be set to *Active* for Staffing:

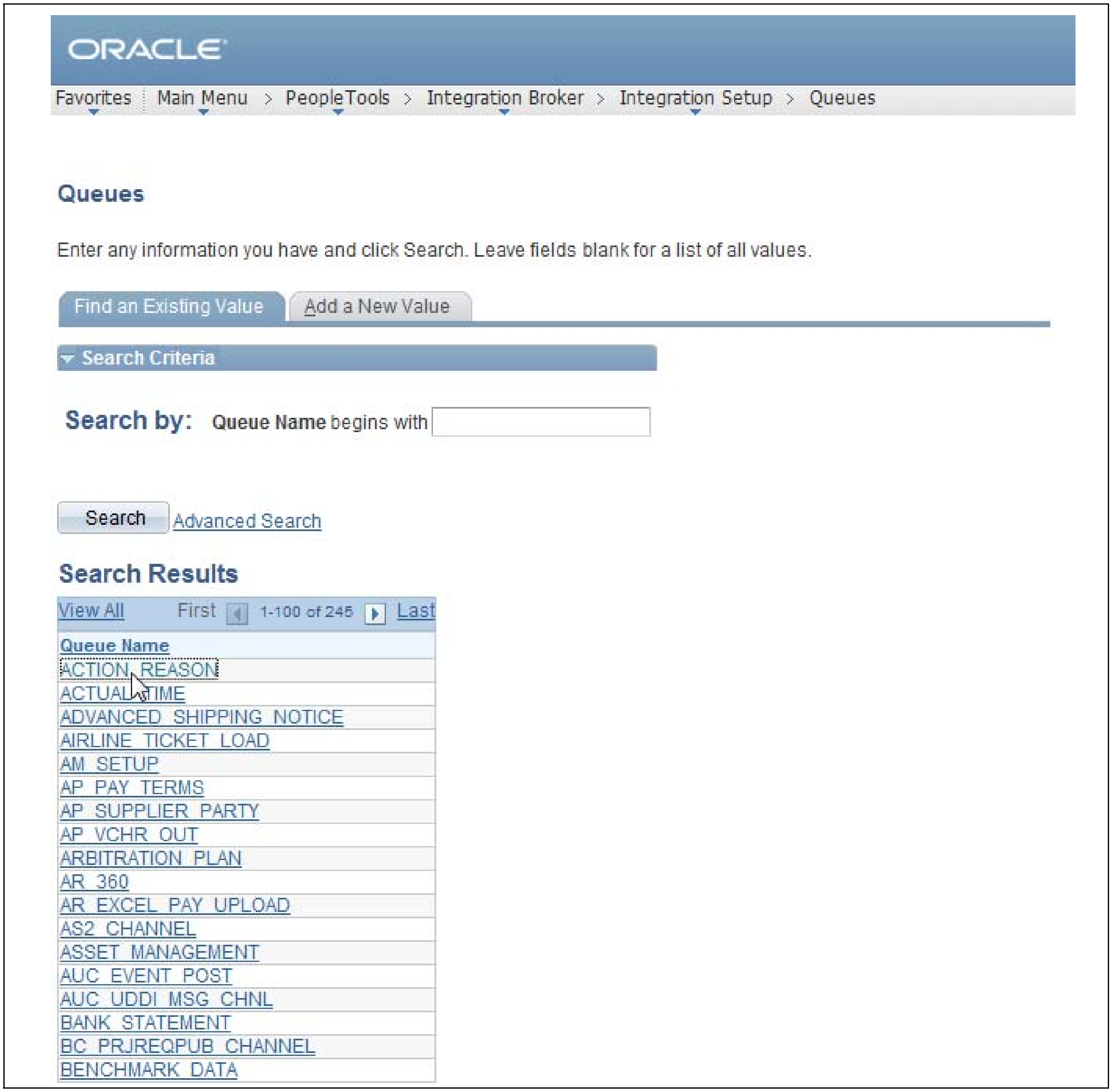
```
ACTION_REASON
ACTUAL_TIME
COMPETENCY
CUSTOMER
ELAPSED_TIME
ENTERPRISE_SETUP
ESTIMATED_TIME
FO_APP_HIRE
FO_ASSIGNMENTS
FO_MASS_CHANGES
FO_SETUP
FO_SYNC
GL_SETUP
HR_SETUP
MARKET_RATES
MARKET_RATE_LOAD
PAYGROUP_SETUP
PERSON_DATA
PERSON_SETUP
PROJECTS_SETUP
RATING_MODEL
TIME_AND_LABOR_SETUP
```

Activating Queue Definitions in PeopleSoft FSCM

To activate Queue Definitions in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 Feature Pack 2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.

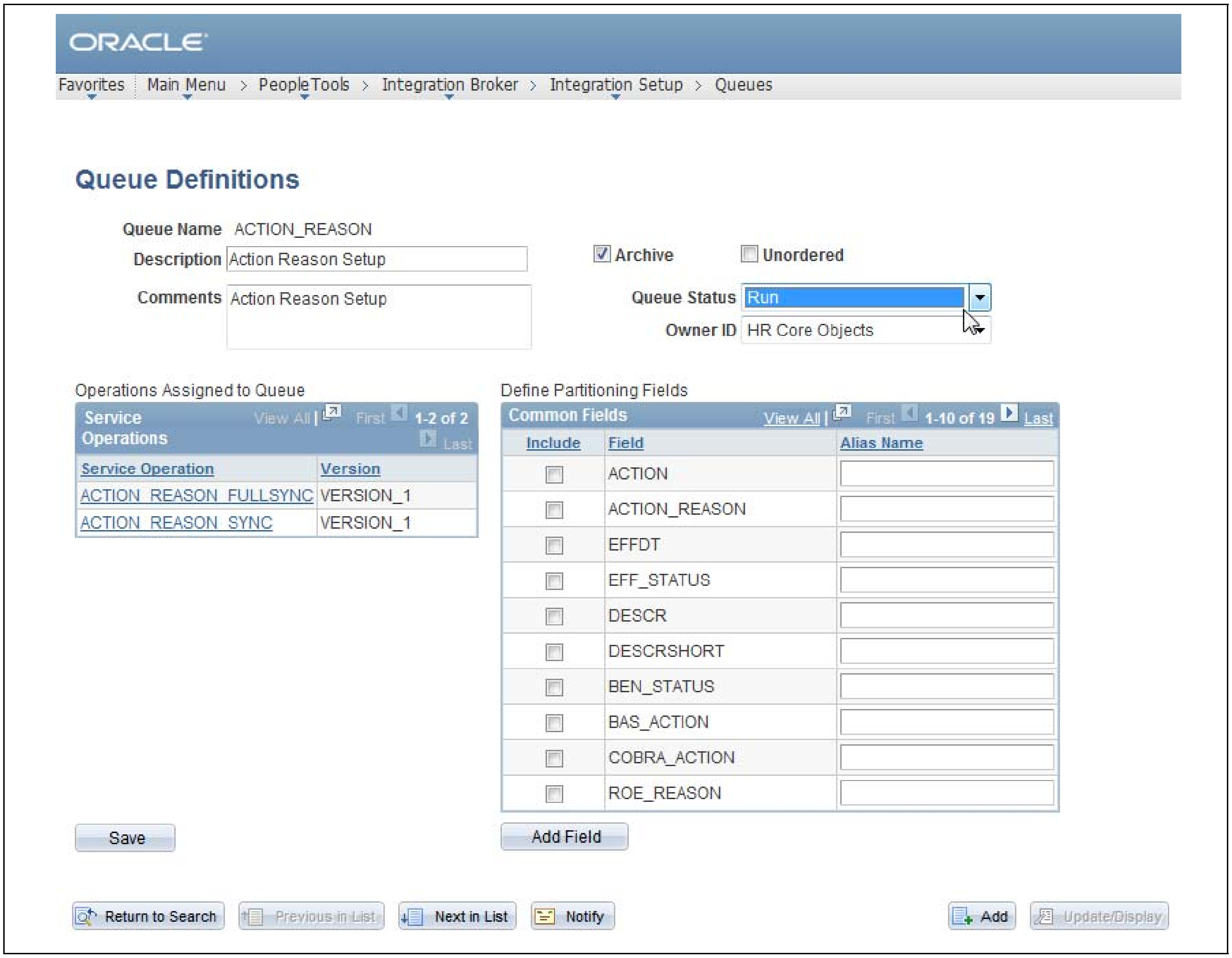
   The Queues search page appears, as shown in the following example:



Queues search page

2. On the Queue search page, select the Find an Existing Value tab and enter a value in the Queue Name field, then click Search.

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.

Activating Queue Definitions in PeopleSoft HCM

To activate Queue Definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queue search page, select the Find an Existing Value tab and enter a value in the Queue Name field, then click Search.
3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.

Task 9-1-7: Setting up the Delivered Service Operations

The Service Operations described here are meant to keep tables in sync between PeopleSoft FSCM 9.1 Feature Pack 2 and PeopleSoft HCM 9.1. You must make decisions about how to implement the integration. These decisions determine your tasks in activating handlers and routings. For information about implementing service operations, refer to the following:

See *PeopleSoft Pay/Bill Management 9.1 PeopleBook*, "Using Enterprise Integration Points."

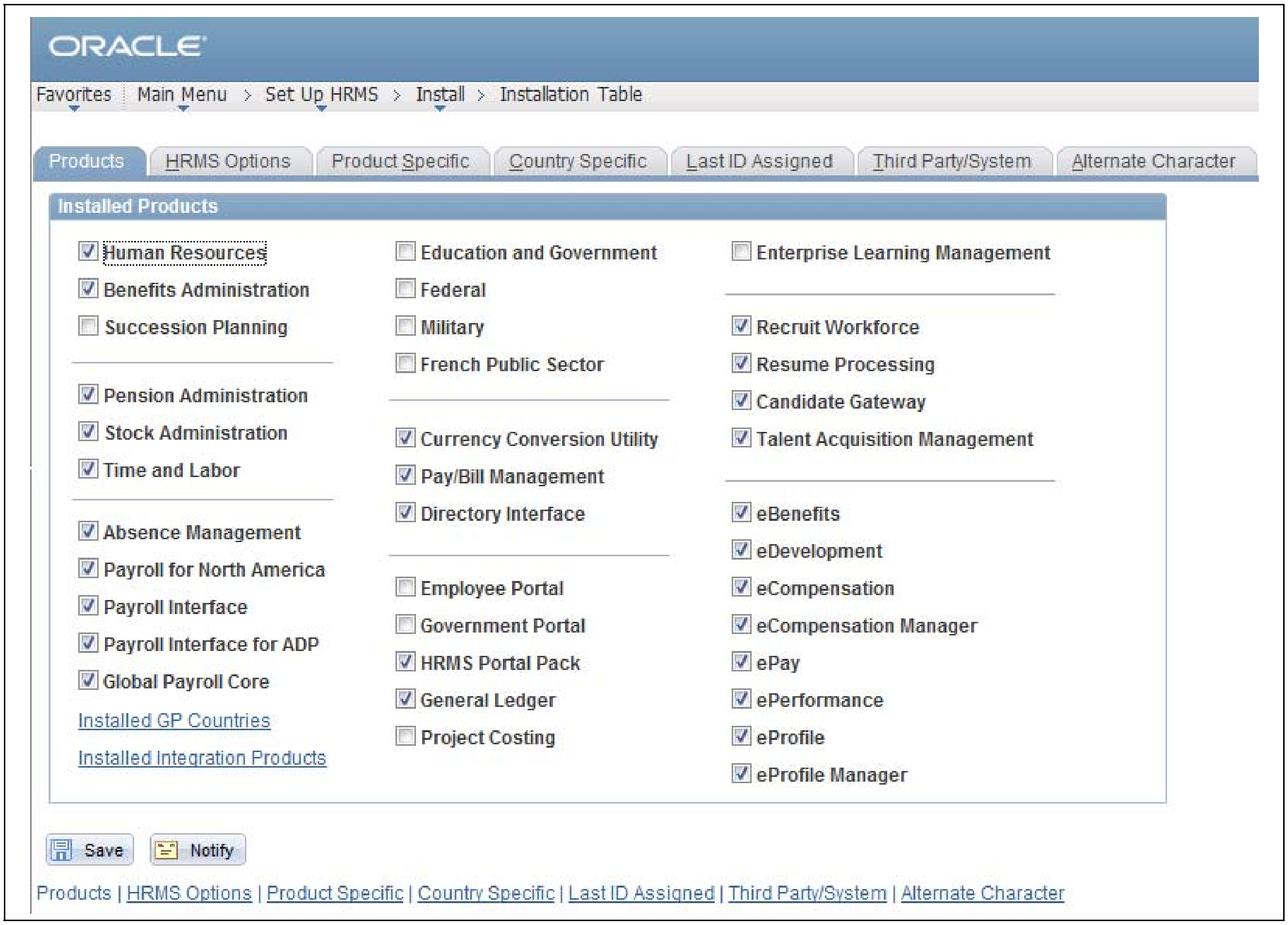
Task 9-2: Checking the Installation Table for PeopleSoft HCM and PeopleSoft FSCM

Task 9-2-1: Checking the Installation Table for PeopleSoft HCM

In this step, you select the Pay/Bill Management and Project Costing installation in the Installation table.

1. In PeopleSoft HCM, select Set Up HRMS, Install, Installation Table.

   The PeopleSoft HRMS Installation Table - Products page appears, as shown in the following example:



HRMS Installation Table - Products page

2. On the Products page, in the Installed Products group box, verify that the Pay/Bill Management check box and the Project Costing check box are selected.

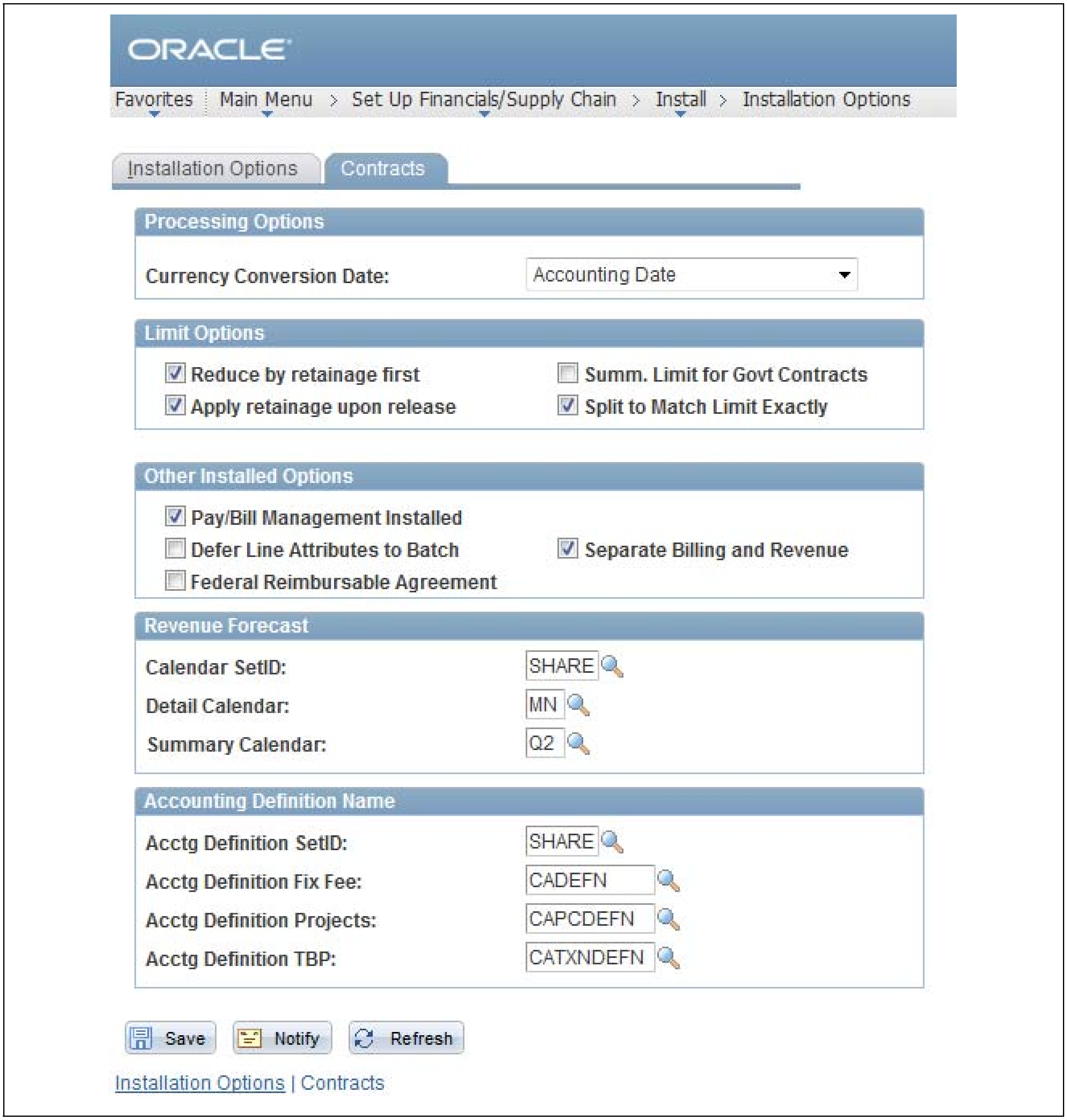
   If they are not selected, select them now.

3. Click Save.

Task 9-2-2: Checking the Installation Table for PeopleSoft FSCM

In this step, you select the Pay/Bill Management for Contracts installation in the Installation table.

1. In PeopleSoft FSCM, select Set Up Financials/Supply Chain, Install, Installation Options.
2. On the Installation Options page, select the Contracts tab to access the Contracts page, as shown in the following example:



FSCM Installation Options - Contracts page

3. On the Contracts page, in the Other Installed Options group box, verify that the Pay/Bill Management Installed check box is selected.

   If it is not selected, select it now.

4. Click Save.

CHAPTER 10

Installing PeopleSoft 9.1 ESA and PeopleSoft FSCM Portal Packs

This chapter discusses:

- Granting Access to Navigation Pages
- Granting Access to Personalize the Portal Homepage
- Enabling Pagelet Creation and Access with Portal Utilities

Task 10-1: Granting Access to Navigation Pages

To access the navigation pages, you must grant security to the Navigation Page IScripts to all users. Use PeopleSoft Data Mover to run the EOPP_ ADD_ROLE.DMS script that is in <PS_APP_HOME>\scripts.

Note. When you create a new user ID, you should add the EOPP_USER role to the new user ID.

Task 10-2: Granting Access to Personalize the Portal Homepage

To add, remove or change the layout of the homepage, you must grant access to the homepage personalization security to all non-guest users.

To update the homepage personalization permission list, use PeopleSoft Data Mover to run the PORTAL_HP_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL_ADD_ROLE.DMS script.

Both scripts are in <PS_APP_HOME>\scripts.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After you run this script, you should manually remove the role PAPP_USER from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 10-3: Enabling Pagelet Creation and Access with Portal Utilities

To enable pagelet creation and viewing using the Enterprise Components Portal Utilities, you can use PeopleSoft Data Mover to run the EOPP_PORTAL_PACK.DMS script in <PS_APP_HOME>\scripts.

Note. Only perform this task if you are licensed for PeopleSoft Financials Portal Pack or Enterprise Portal.

CHAPTER 11

Integrating PeopleSoft 9.1 Project Costing and Program Management with Microsoft Project 2007

This chapter discusses:

- Understanding the PeopleSoft-Microsoft Project Integration
- Installing the PeopleSoft-Microsoft Project Integrator
- Configuring the PeopleSoft-Microsoft Project Integrator

Understanding the PeopleSoft-Microsoft Project Integration

The PeopleSoft-Microsoft Project Integrator is required if you are integrating PeopleSoft Project Costing or PeopleSoft Program Management with Microsoft Project 2007 (Microsoft Windows XP). PeopleSoft-Microsoft Project Integrator must be installed and running on each file server that you plan to use as a point of integration.

Note. PeopleSoft-Microsoft Project Integrators must be installed on a machine that is configured with Microsoft Project 2007. It is important that you do not use this machine for any other purpose. The integrator supports Windows Terminal Server, which means that one machine can be used to run multiple Integrators.

Task 11-1: Installing the PeopleSoft-Microsoft Project Integrator

To install the project integrator:

1. Create a directory, *<MSP_HOME>*, for the MSP Integrator on the Microsoft Windows machine that is dedicated as the Microsoft Project Integrator.

   For example: C:\MSP\

2. From your file server, copy the files in <PS_APP_HOME>/src/vb/msp to the <MSP_HOME> directory.
3. To register any missing ActiveX controls in the Microsoft Windows machine that is dedicated as the Microsoft Project Integrator, check the Windows system installation directory (<WINDOWS_INST>), for example C:\WINNT\SYSTEM32 or C:\WINDOWS\SYSTEM32, for the following OCX files:
   - Richtx32.ocx
   - TABCTL32.OCX
   - MSINET.OCX
4. If any of these files are missing, do the following:

   a. Copy the three files from <PS_APP_HOME>/src/vb/msp to <WINDOWS_INST>.

b. Copy the file regmsp.bat from <PS_APP_HOME>/src/vb/msp to <WINDOWS_INST>.

c. Run <WINDOWS_INST>\regmsp.bat to register the OCXs.

For example:

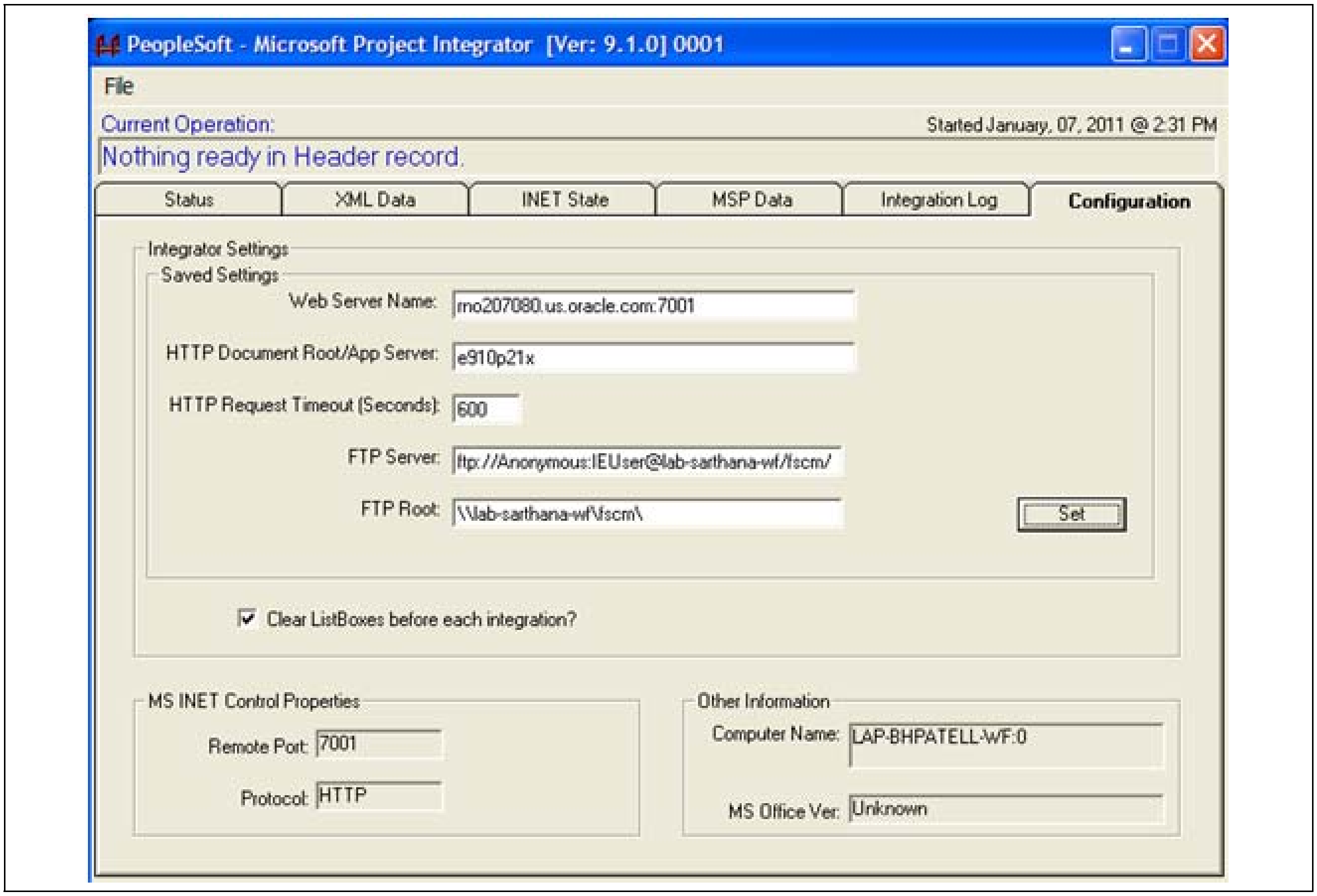
```
C:\WINNT\system32\regmsp.bat.
```

Task 11-2: Configuring the PeopleSoft-Microsoft Project Integrator

After the Microsoft Project Integrator is running, you must configure it for your environment.

To configure the Microsoft Project Integrator for your environment:

1. Launch <MSP_HOME>\PC_MSP2.EXE to start the Microsoft Project Integrator application.
2. Select the Configuration tab to access the Configuration page, as shown in the following example:



Microsoft Project Integrator: Configuration page

3. Enter the following values:
   - In the Web Server Name field, enter the name of the web server.

- In the HTTP Document Root/App Server field, enter the Application Server name.

  To verify the Application Server name, launch your browser and log in to PeopleSoft. View the URL address.

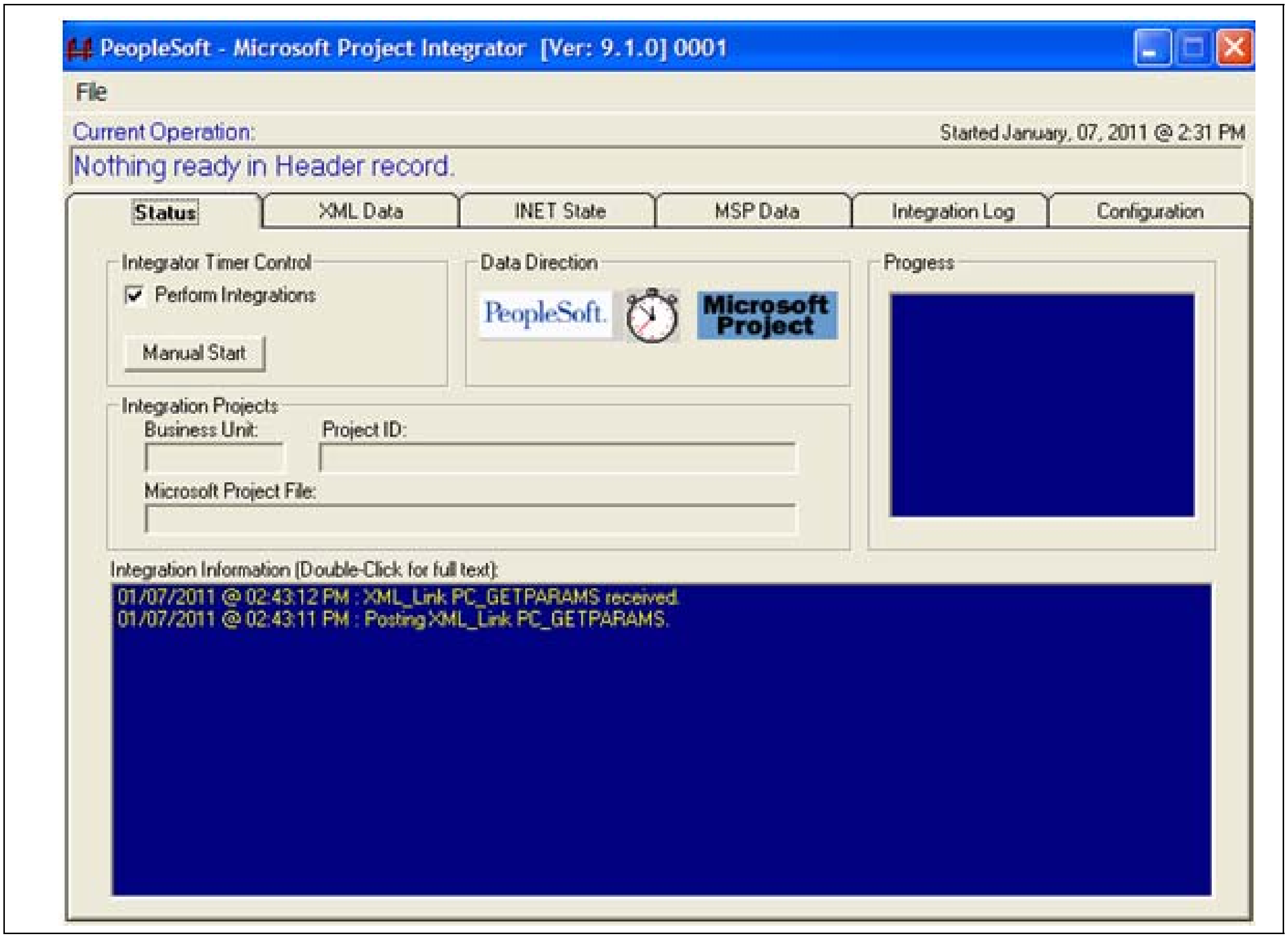
  For example: http://rno207080.us.oracle.com:7001/psp/e910p21x/?cmd=login

  In the preceding example, *rno207080.us.oracle.com:7001* is entered as the Web Server Name and *e910p21x* is entered as the HTTP Document Root/App Server.

- In the FTP Server field, enter the FTP server that this integrator uses to direct the application server to send the .mpp files to integrate.
- In the FTP Root field, enter the Microsoft Windows file path to the root location of the FTP server.

  This is the file path that the Microsoft Project uses to find the .mpp files to integrate.

4. You can verify that the Microsoft Project Integrator is running successfully when you see a similar message in the Integration Information section of the Status page, as shown in the following example:



Microsoft Project Integrator - Status page: Showing the Integration Information message

Example of Integration Information message when working properly:

01/07/2011@02:43:12PM XML_Link PC_GETPARAMS received

01/07/2011@02:43:12PM PostingXML_Link PC_GETPARAMS

If you receive the following error in the XML Data tab the first time that you run the integrator: *10.5.1 500 Internal Server Error. The server encountered an unexpected condition which prevented it from fulfilling the request*, then do the following:

1. Open a browser and run the following URL:

   http://<WebServerName>/xmllink/<ApplicationServerName>/

   For example:http://rno207080.us.oracle.com:7001/xmllink/e910p21x/

2. Then run the integrator again.

To launch the project integrator upon start up, create a shortcut to PC_MSP2.EXE in the server's Startup folder to ensure it initiates upon start up.

CHAPTER 12

Defining an FTP Server for File Attachments in PeopleSoft 9.1 Project Costing

This chapter discusses:

- Understanding File Attachment Storage
- Setting Up File Attachment Storage on the Database
- Setting Up File Attachment Storage on a File Server

Understanding File Attachment Storage

This chapter discusses how to specify an FTP server for project and activity file attachments. You can store file attachments on the database or on a file server. You can then upload and download files by using the Attachments page that is available at both the project and activity levels in PeopleSoft Project Costing.

Task 12-1: Setting Up File Attachment Storage on the Database

To store file attachments on the database:

1. Select Set Up Financials/Supply Chain, Install, Installation Options, Project Costing.
2. On the Project Costing page, in the File Attachment Option section, select the Database option.
3. Click Save.

Note. PeopleSoft Project Costing delivers the PC_PROJECTS_DB_ATTACHMENT URL. No additional step is required to set up this method for file attachments.

Task 12-2: Setting Up File Attachment Storage on a File Server

To store file attachments on a file server:

1. Verify that the FTP server has adequate disk storage to store the project and activity documents.
2. Select PeopleTools, Utilities, Administration, URLs.

   Note. PeopleSoft Project Costing delivers this URL.

3. On the URLs search page, search for and select the URL *PC_PROJECTS_DOC_ATTACHMENT*.
4. On the URL Maintenance page, enter the URL path to the designated FTP server in the following format:

   ftp://<userID>:<password>@<machinename>

   Note. The user name and password that you specify here are critical. The system uses these values to connect all users to the FTP attachment server.

   - In the User ID field, enter the user ID of the user account under which all users connect to the FTP server for adding, updating, viewing, and deleting documents.
   - In the Password field, enter the password that is associated with the user account under which all users connect to the FTP server.
   - In the Machine Name field, enter the machine name by which the FTP server is physically identified on the network.

     If you create an optional directory for document storage on the server, include the directory name when citing the path. You can also store attachments in the root directory of the FTP server.
5. Click Save.
6. On the Installation Options - Project Costing page, in the File Attachment Options section, select the *File Server* option and enter the home directory where the attachment files are stored.
7. Click Save.

For more information on the URL Maintenance page:

See *PeopleTools 8.52: System and Server Administration PeopleBook,* "Using PeopleTools Utilities."

For more information on the PeopleSoft Installation Options - Project Costing page:

See *PeopleSoft Application Fundamentals 9.1 PeopleBook,* "Setting Installation Options for PeopleSoft Applications. "

CHAPTER 13

Setting Up PeopleSoft 9.1 Staffing Front Office

This chapter discusses:

- Setting Up Document Attachments
- Setting Up the Verity Search Engine (Optional)
- Integrating Resume Parsing for PeopleSoft Staffing Front Office

Task 13-1: Setting Up Document Attachments

In PeopleSoft Staffing Front Office 9.1, the PeopleSoft system uses the standard file attachments functionality. This functionality is used in many components by multiple PeopleSoft products.

Note. PeopleSoft Staffing Front Office is only supported on Microsoft SQL Server, Oracle and DB2 UDB for Linux, UNIX, and Microsoft Windows.

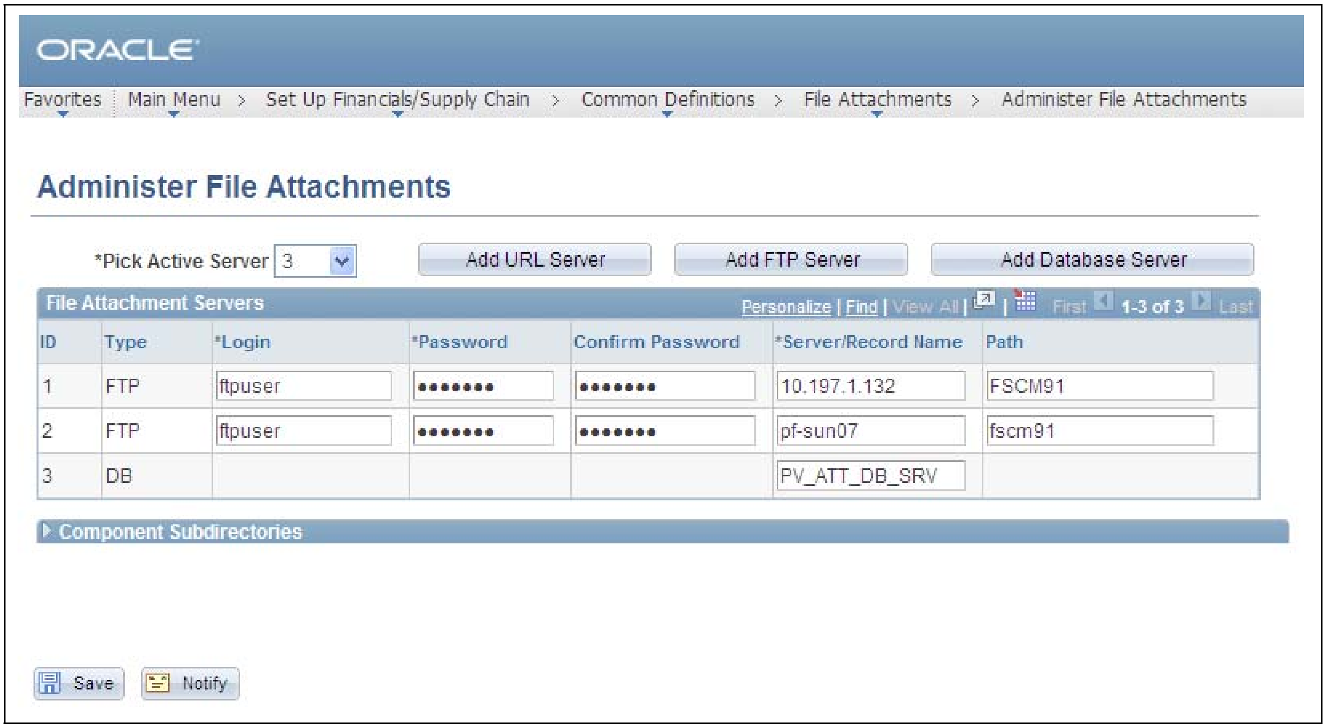
If you are planning to use file attachments for Applicants, Employees, Orders, Assignments, Customers, or Contacts, then you need to set up an FTP server.

Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments to access the correct page.

Attachments to PeopleSoft Staffing Front Office Orders and Assignments are stored and retrieved from the server locations defined here. System administrators can configure one or more servers to store attachments. These servers can be FTP servers or database servers.

Using this page, system administrators can set up new servers and identify the active server. Administrators can add or modify the FTP root folder for FTP servers.

Use the following example and list of fields on the Administer File Attachments page to configure the FTP server:



Administer File Attachments page

- In the Pick Active Server drop-down list box, select the server ID of the active (or default) server where all newly created attachments are stored. This is a required field.

  You can switch the active server at any time. All previously created attachments are still retrieved from the server where they were originally stored. The attachments keep a reference to the original server.
- Click the Add FTP Server button (add file transfer protocol server) to insert a new row in the grid to define a new FTP server for attachments.
- The Add Database Server button is *not* applicable for PeopleSoft Staffing Front Office attachments.
- The ID field displays the system-assigned ID number for each server on this page.

  When an attachment is stored to the server, the server ID is inserted into the attachment record. When you request to download (view) this attachment, the system retrieves the attachment from the original server, based on the server ID.
- The Type field identifies the type of server, based on whether you click the Add FTP Server button or the Add Database Server button.

  After you have saved the row and exited the component, you cannot change the server type.

  The server type values are:
  - FTP (file transfer protocol server)

    Only the FTP server is supported for PeopleSoft Staffing Front Office attachments.
  - DB (database server)
- In the Login field, enter or change the login name. The Login is required for FTP servers only.
- In the Password field, enter or change the password corresponding to the Login Name. The password is required for FTP servers only.
- In the Server/Record Name field, enter the machine name for the FTP server.

After you save the information, change the machine name only if the same FTP server is renamed.

To add a different FTP server, click the Add FTP Server button to insert a new row into the grid and define the new server. You cannot delete servers because attachments may already be stored on those servers.

- In the Path field, enter the subdirectory path under the server's FTP root where all attachments are to be stored. The Path is required for FTP servers only.
- The Component Subdirectories group box and fields are *not* applicable for PeopleSoft Staffing Front Office attachments.

Note. You cannot delete a server after you save the page. After you exit the component, the system assumes that attachments may already be stored on this server location.

Task 13-2: Setting Up the Verity Search Engine (Optional)

PeopleSoft Staffing Front Office 9.1 utilizes the Verity Search Engine to address its search needs. The Verity Search Engine is a common functionality between PeopleSoft Staffing and Resource Management.

If you plan to use any of the search functionality in PeopleSoft Staffing Front Office 9.1, you can select Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration to set up your Search Configuration.

See *PeopleSoft Resource Management 9.1 PeopleBook,* "Enabling Resource Matching and Cache Processes."

Task 13-3: Integrating Resume Parsing for PeopleSoft Staffing Front Office

This section discusses:

- Understanding Resume Parsing for PeopleSoft Staffing Front Office
- Setting up Staffing Installation Options for Resume Parsing
- Configuring the PeopleSoft Integration Broker
- Setting Up Mapping
- Assigning Mapping Setups
- Defining Mapping Values

Understanding Resume Parsing for PeopleSoft Staffing Front Office

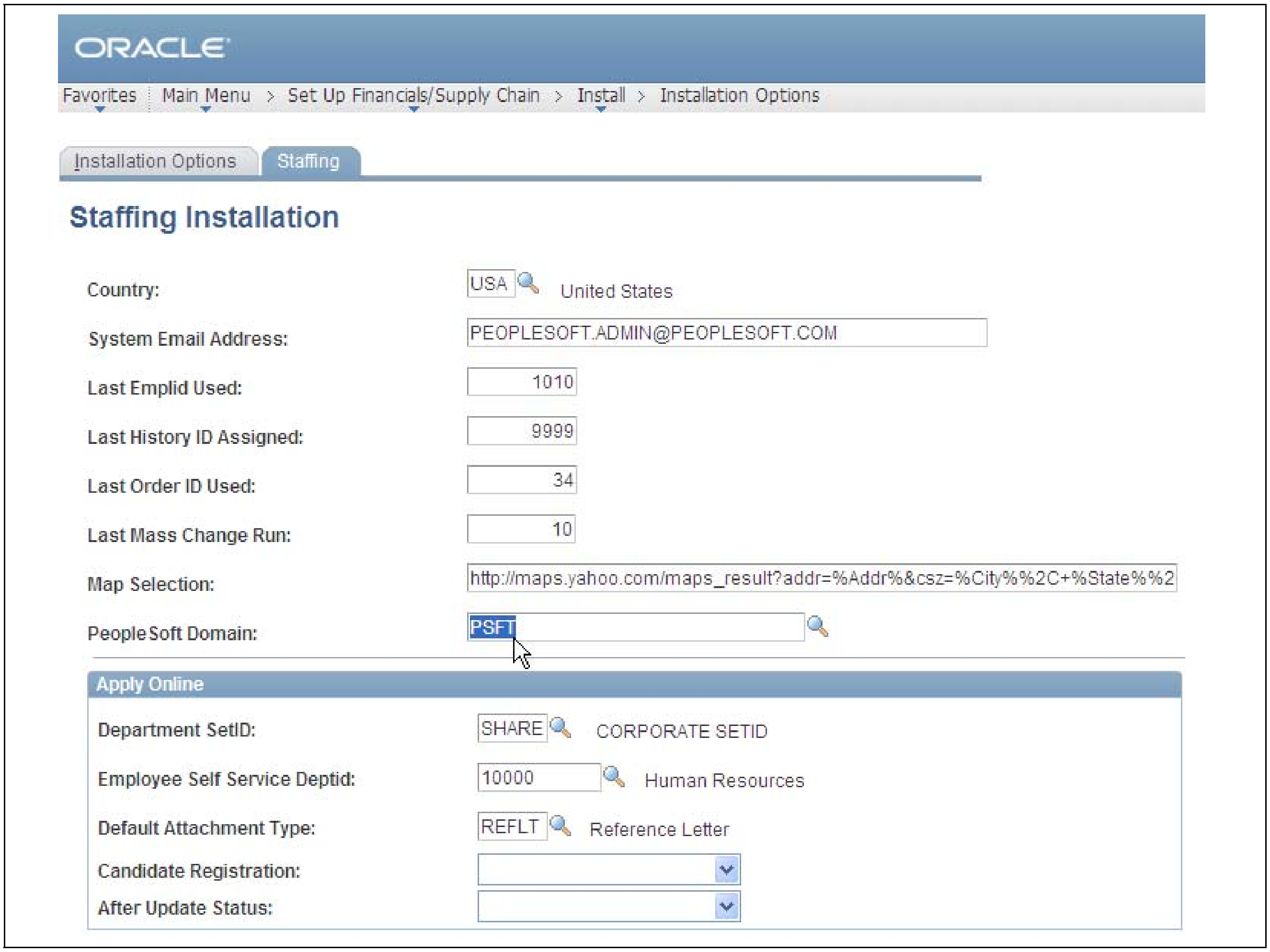
Resume parsing strips resumes of their formatting, leaving behind the work history, skill set, education and other data in a basic and consistent format. You can then load this extracted data into a database and the appropriate fields for searching and processing.

You can use PeopleSoft Staffing Front Office (SFO) to integrate with additional component (third-party) resume parsing software (must be HR-XML Candidate standard compliant) to retrieve the extracted data.

Task 13-3-1: Setting up Staffing Installation Options for Resume Parsing

To set up PeopleSoft Staffing Front Office installation options to utilize resume parsing:

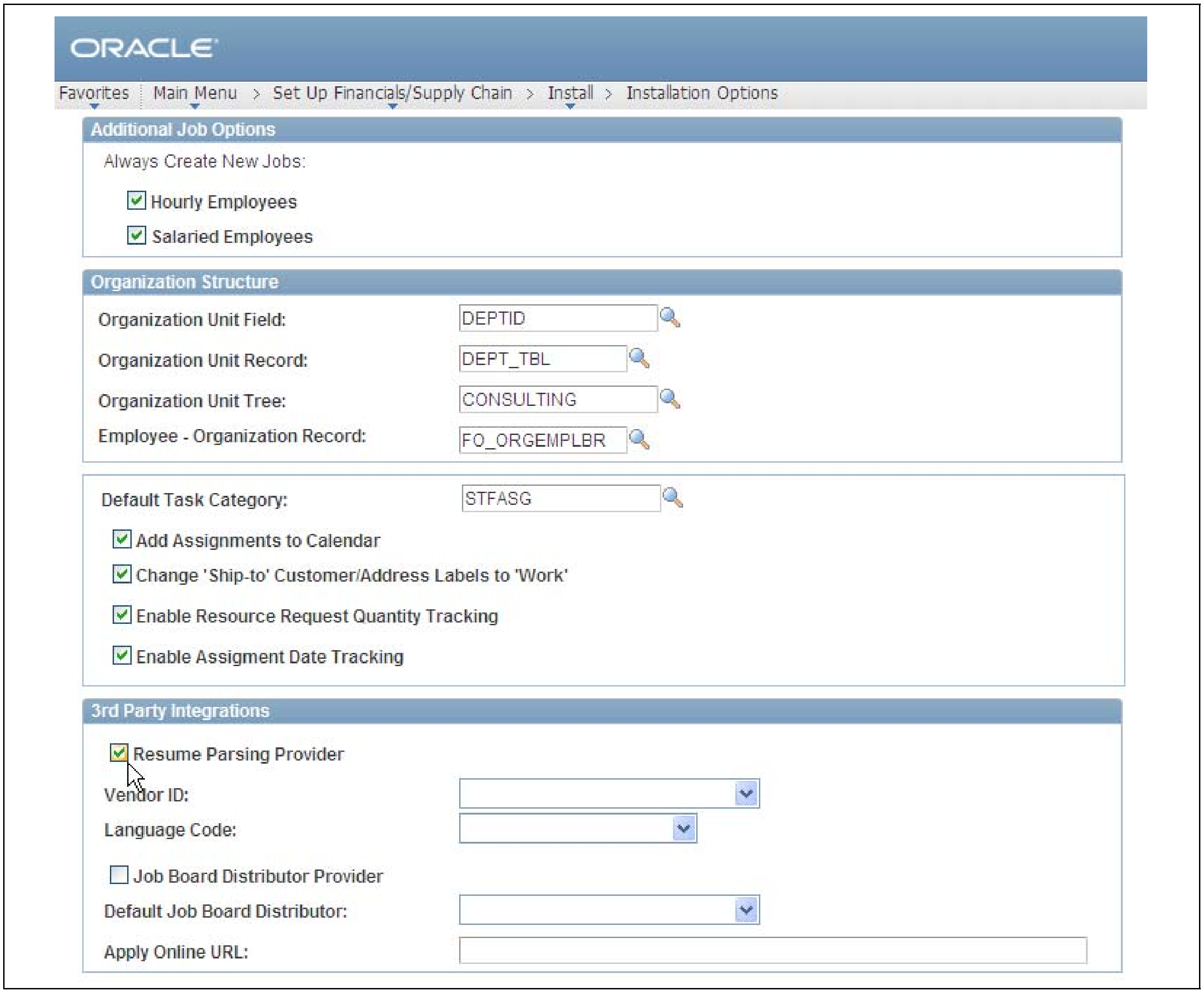
1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Select the Staffing tab to access the Staffing Installation page, as shown in the following example:



Installation Options - Staffing Installation page showing the PeopleSoft Domain (1 of 2)

3. On the Staffing Installation page, in the PeopleSoft Domain field, enter or browse to select the PeopleSoft domain.

   For example: *PSFT*



Installation Options - Staffing Installation page showing the Resume Parsing Provider (2 of 2)

4. In the 3rd Party Integrations group box, select the Resume Parsing Provider check box.

   The remaining fields in this section vary, depending on the resume parsing provider that you select.

Note. After you complete your basic PeopleSoft FSCM 9.1 Feature Pack 2 and PeopleSoft SFO installation, you can complete the remaining Staffing Installation options and fields on this page, using the implementation instructions in the PeopleSoft 9.1 Staffing Front Office PeopleBook.

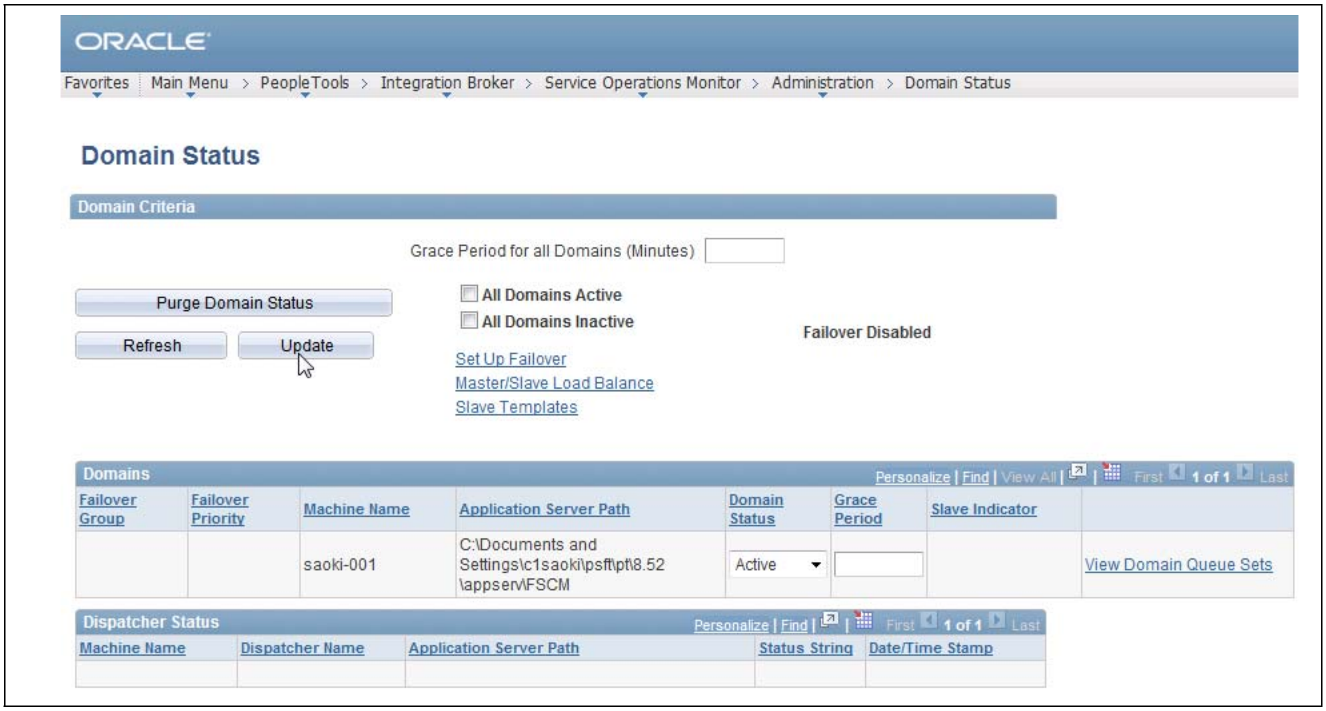
Task 13-3-2: Configuring the PeopleSoft Integration Broker

Activating the Domain

To activate the local domain in PeopleSoft FSCM:

1. In your PeopleSoft FSCM 9.1 environment, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

   The Domain Status page appears, as shown in the following example:



Domain Status page

2. On the Domain Status page, in the Domain Status field, select *Active* from the drop-down list box.
3. Click the Update button.

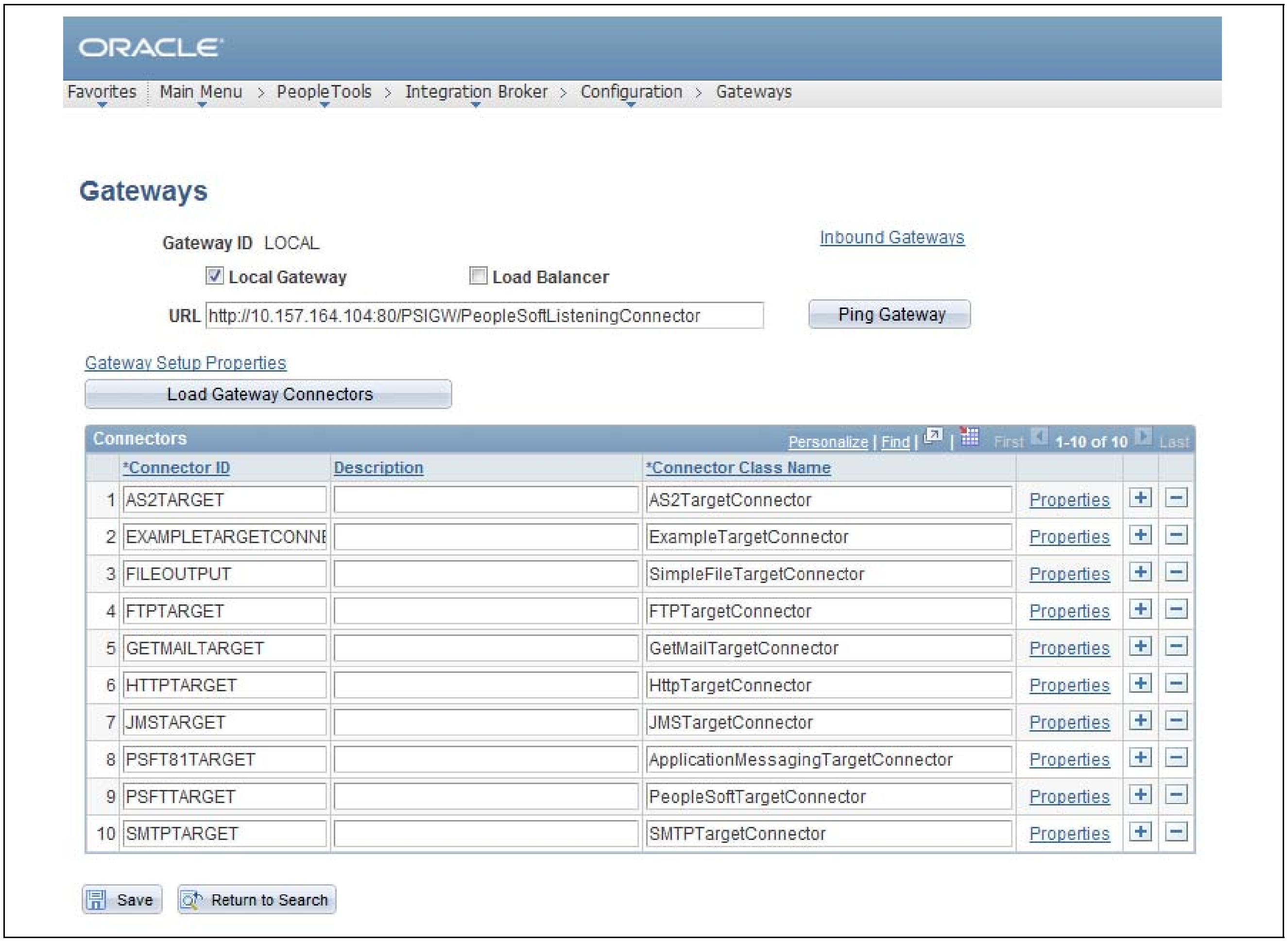
Note. After you click Update, if your machine name does not appear in the list, click the Purge Domain Status button, and then click the Refresh button.

Setting Up Integration Gateways

To set up integration gateways in PeopleSoft FSCM:

1. In your PeopleSoft FSCM 9.1 environment, select PeopleTools, Integration Broker, Configuration, Gateways, and then click Search.

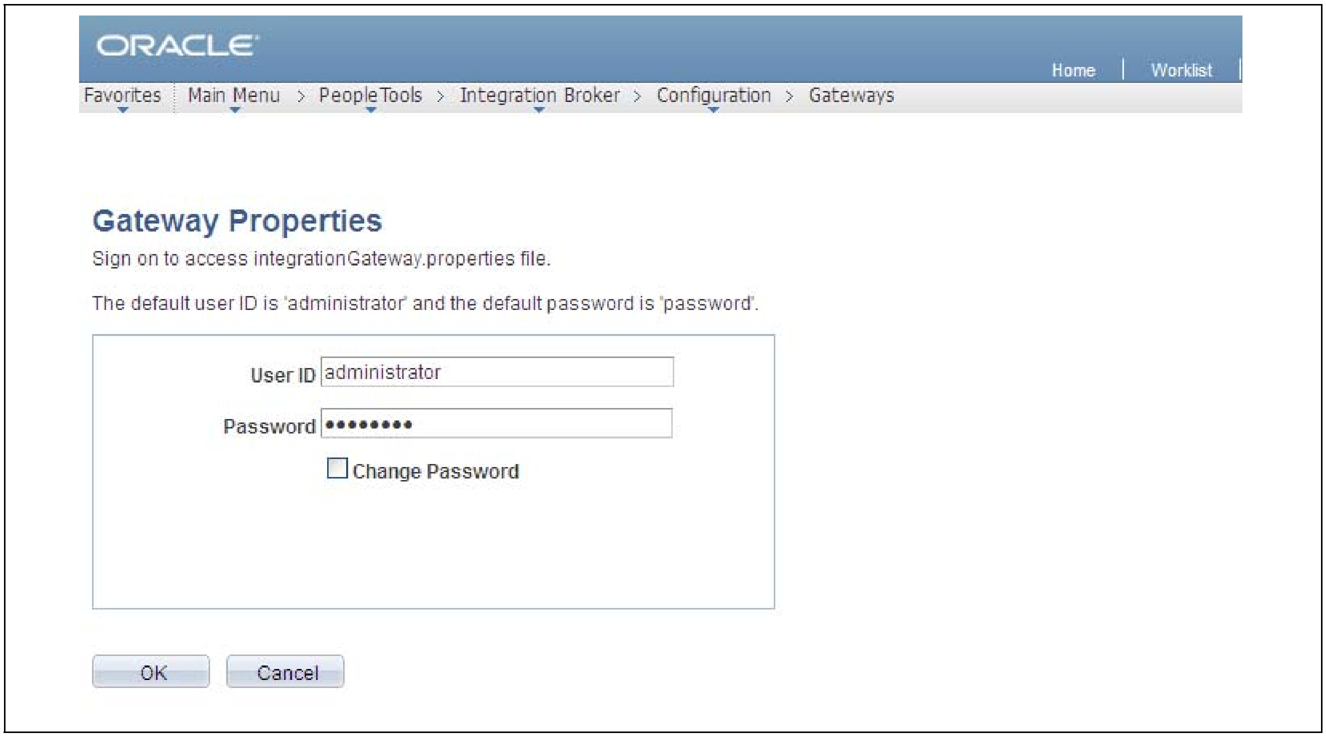
   The Gateways page for the Local Gateway appears by default, as shown in the following example:



Gateways page for the Local Gateway

2. On the Gateways page for the Local Gateway, in the URL field, enter *http://<IBHostname>:<port> /PSIGW/PeopleSoftListeningConnector* for the local gateway URL.
3. Click the Load Gateway Connectors button.
4. Click Save.
5. Click the Ping Gateway button to verify connectivity and proper configuration.
6. Click the Gateway Setup Properties link to access the Gateway Properties.

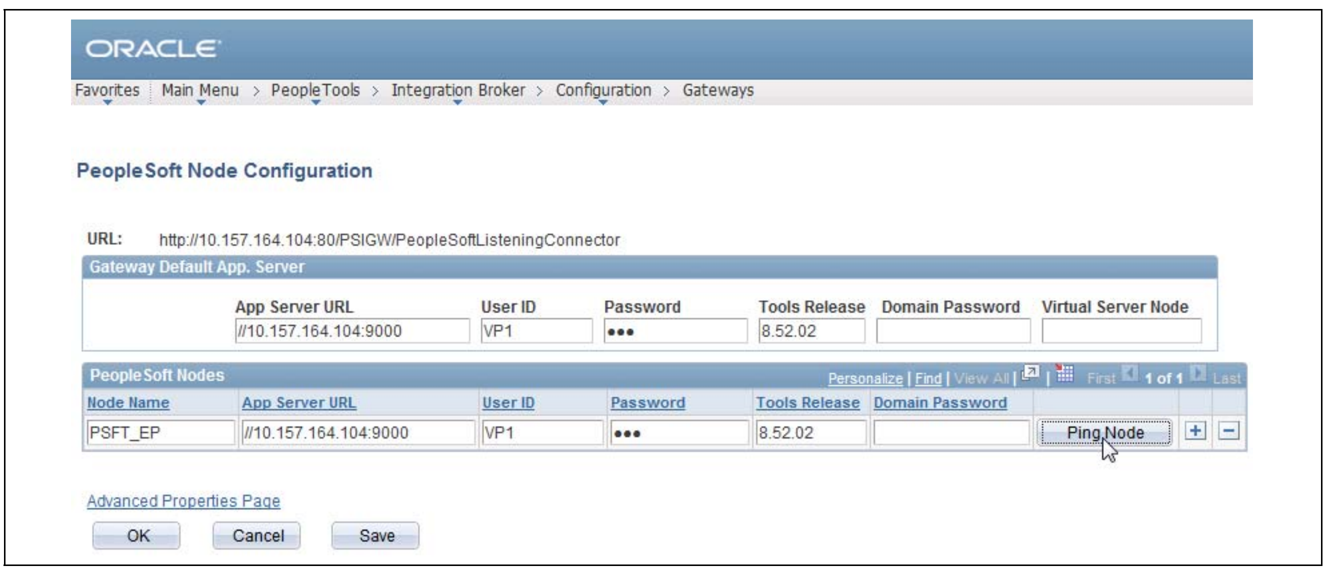
   The Gateway Properties sign on page appears, as shown in the following example:



Gateway Properties sign on page

7. On the Gateway Properties sign on page, enter the following:
   - In the User ID field, enter *Administrator*.
   - In the Password field, enter *password*.
8. Click OK.

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



PeopleSoft Node Configuration page

9. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:
   - App Server URL

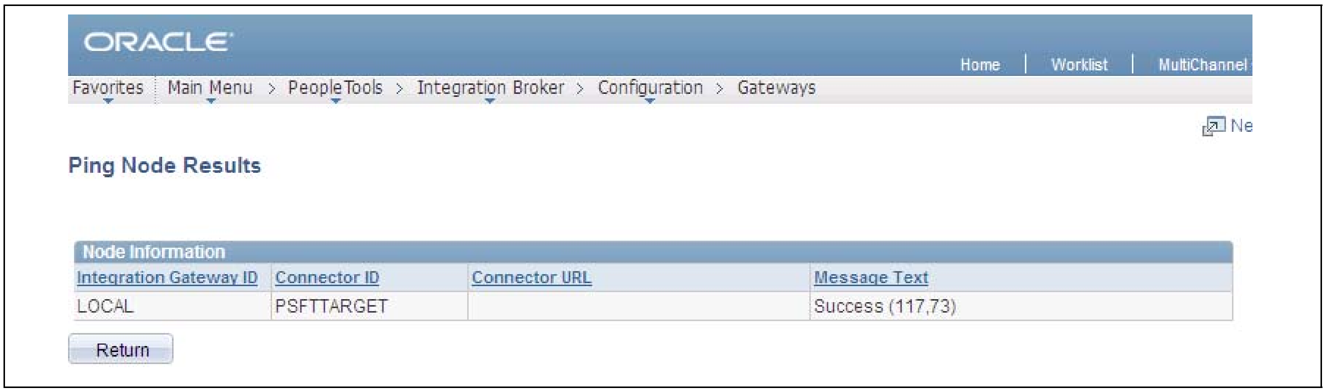
- Password
- Tools Release (PeopleTools Release)

10. In the PeopleSoft Nodes group box, in the Node Name field, enter *PSFT_EP* for the PeopleSoft local node.

    As necessary, click the Add (+) button to add the default local node PSFT_EP (Oracle delivers this node as demo data).

11. In the Tools Release field, enter the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway, as it must match exactly.
12. Click Save.
13. Click the Ping Node button to ping the PSFT_EP node (the default local node) and verify that it is responding.

    If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results page

14. Click the Return button to return to the PeopleSoft Node Configuration page.

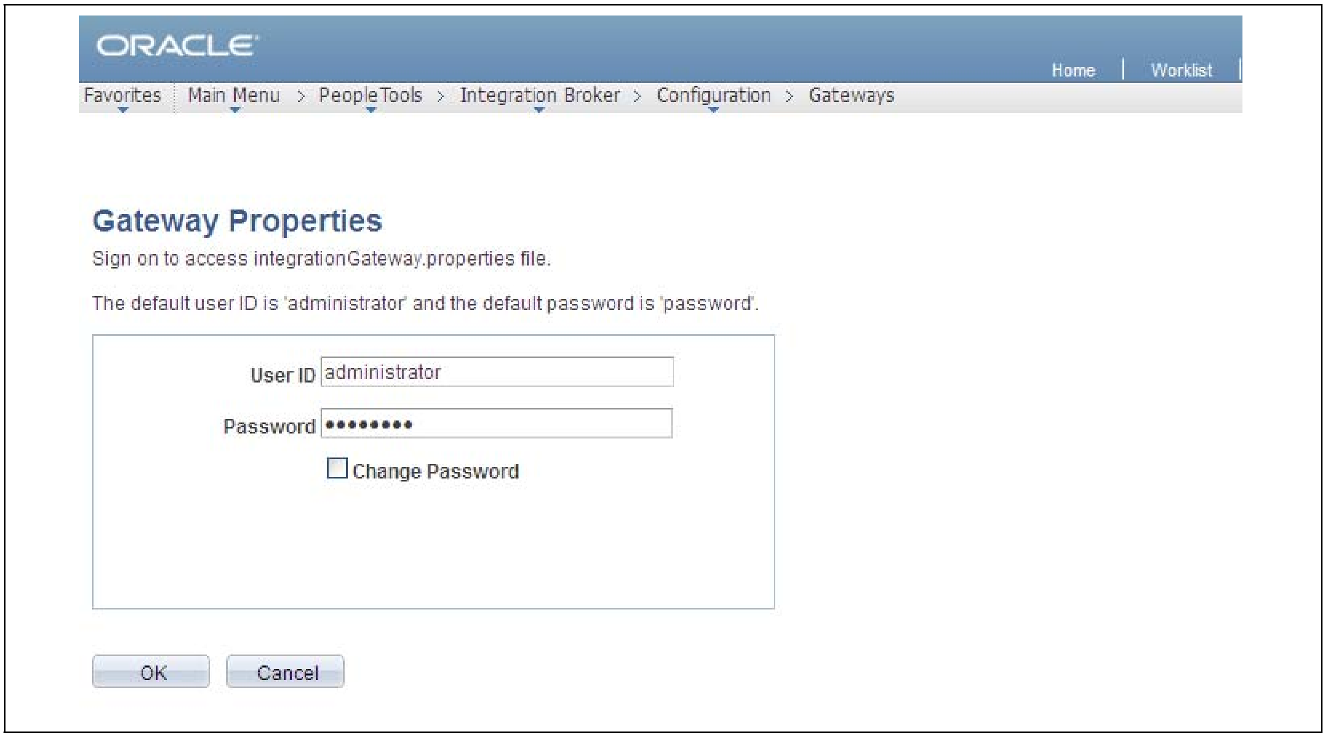
Adding the Proxy Settings (Optional)

If your environment is behind a proxy server, perform these steps to add the proxy settings to the gateway. Adding proxy settings is optional, based on your server configuration. If you have no proxy settings to add, you can skip these steps and proceed to the next task.

To add proxy settings to the gateway:

1. In your PeopleSoft FSCM 9.1 environment, select PeopleTools, Integration Broker, Configuration, Gateways.

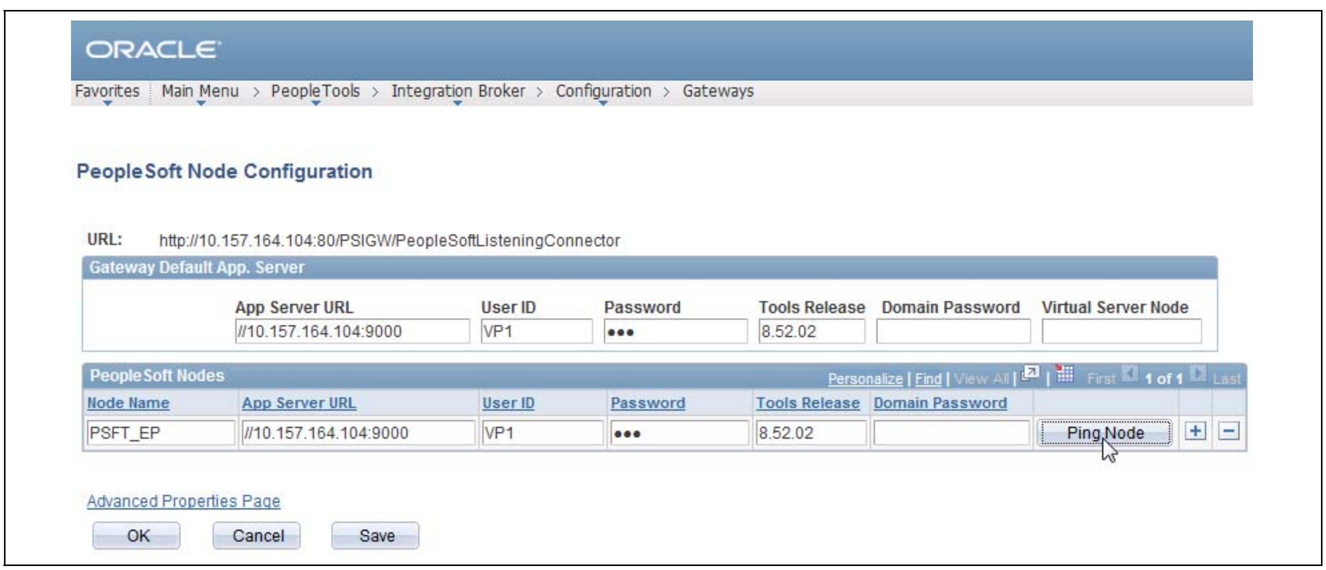
    The Gateway Properties sign on page appears, as shown in the following example:



Gateway Properties sign on page

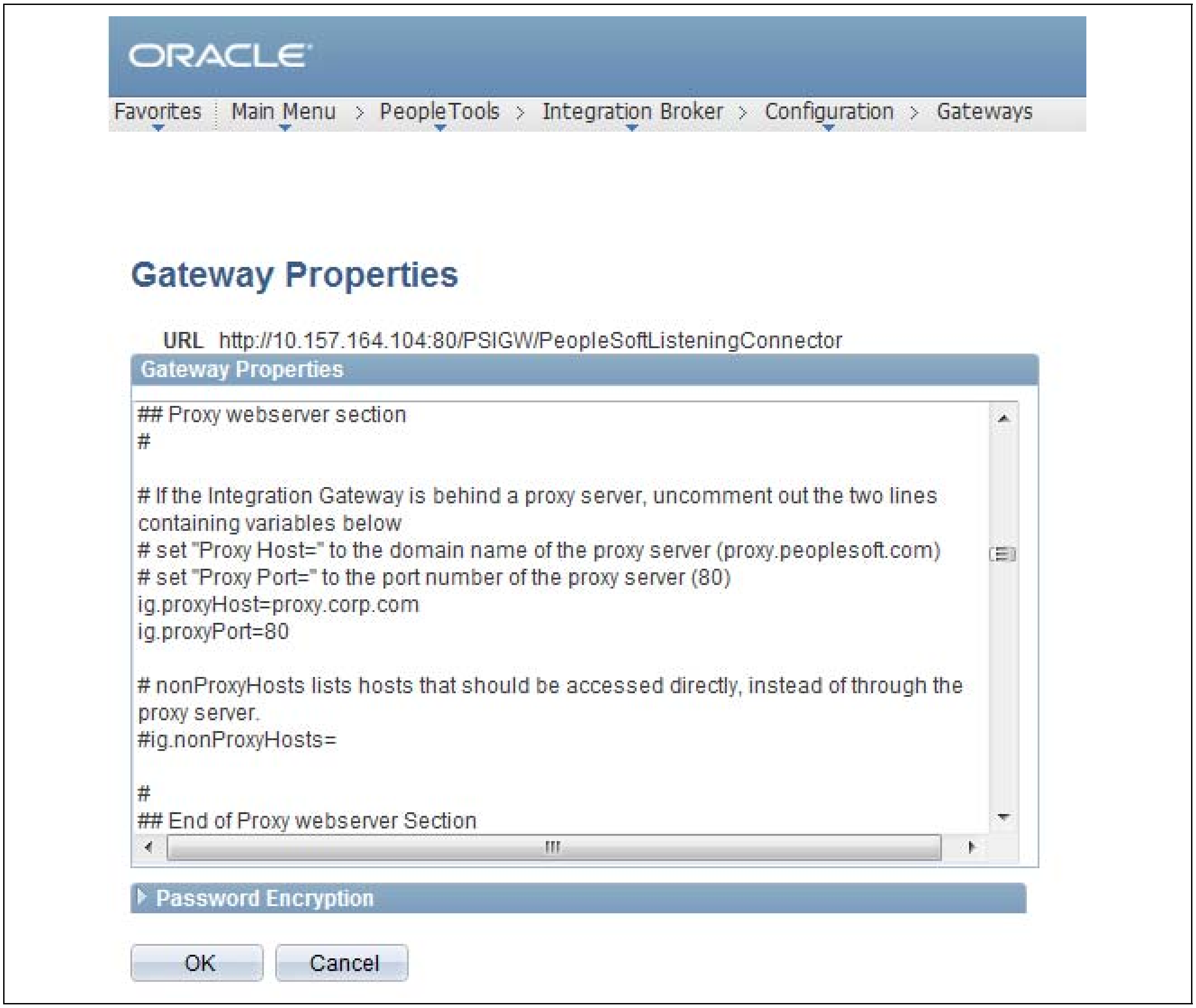
2. On the Gateway Properties sign on page, enter the following:
   - In the User ID field, enter *Administrator*.
   - In the Password field, enter *password*.
3. Click OK.

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



PeopleSoft Node Configuration page

4. On the PeopleSoft Node Configuration page, click the Advanced Properties Page link to access the Gateway Properties page, as shown in the following example:



Gateway Properties page

Encrypting the Password for the secureKeystore

Use the Password Encryption Utility section to encrypt the password for the secureKeystore and then add that password to your Gateway properties.

1. On the Gateway Properties page, click the arrow to expand the Password Encryption Utility section, as shown in the following example:

Gateway Properties page showing the Password Encryption Utility

2. In the Password Encryption Utility section, add the secure file keystore as follows:
   - In the Password field, enter *password*.
   - In the Confirm Password field, enter *password*.
   - Click the Encrypt button to encrypt the password.
3. After you encrypt the password, copy and paste it to the property (paste after secureFileKeystorePasswd=).

   For example: `secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==`
4. Click OK.

Task 13-3-3: Setting Up Mapping

Understanding the Mapping Setup

You must define the Mapping setup to map the PSFT record and field structure with the Partner field structure.

The following lists the two types of mapping:

- Dynamic—for use when XREF tables occasionally change (add/update/delete).

  For use in mapping fields with values that will change from time to time and need more maintenance in the future (such as degree codes, major codes and so on).

- Static—for use when system codes rarely change, but contain a different set of values for use by candidates (such as gender).

  For use in mapping fields with little to no value changes in the future (such as status fields, email type and so on).

You should create mappings for the items in the following table, according to the examples in the table for both mapping types:

Map Name	Type	Elements (Type and Length)	PSFT Domain (Uniqueness)*	HRXML Domain (Uniqueness)
PhoneTypeDVM	Static	PHONE_TYPE (String, 4) PHONE_TP (String, 20)	PHONE_TYPE (Unique)	PHONE_TP (Unique)
CountryCodeXREF	Dynamic	COUNTRY (String, 3) COUNTRCODE (String, 3)	COUNTRY (Unique)	COUNTRYCODE (Unique)
EmailTypeDVM	Static	E_ADDR_TYPE (String, 4) EMAIL_TP (String, 20)	E_ADDR_TYPE (Unique)	EMAIL_TP (Unique)
CompetencyXREF	Dynamic	COMPETENCY (String, 8) COMPETENCY_ CODE (String, 50)	COMPETENCY (Unique)	COMPETENCY_ CODE (Unique)
DegreeXREF	Dynamic	ACCOMPLISHMENT (String, 8) DEGREE (String, 50)	ACCOMPLISHMENT (Unique)	DEGREE (Unique)
LanguageXREF	Dynamic	ACCOMPLISHMENT (String, 8) LANGUAGE (String, 3)	ACCOMPLISHMENT (Unique)	LANGUAGE (Unique)
LicenseXREF	Dynamic	ACCOMPLISHMENT (String, 8) DEGREE (String, 50)	ACCOMPLISHMENT (Unique)	LICENSE (Unique)

Map Name	Type	Elements (Type and Length)	PSFT Domain (Uniqueness)*	HRXML Domain (Uniqueness)
MajorXREF	Dynamic	MAJOR_CODE (String, 10) MAJOR (String, 50)	MAJOR_CODE (Unique)	MAJOR (Unique)
MembershipXREF	Dynamic	ACCOMPLISHMENT (String, 8) MEMBERSHIP (String, 50)	ACCOMPLISHMENT (Unique)	MEMBERSHIP (Unique)
SchoolXREF	Dynamic	COUNTRY (String, 3) SCHOOL_CODE (String, 10) COUNTRY_CODE (String, 3) SCHOOL (String, 50)	COUNTRY SCHOOL_CODE (Unique)	COUNTRY_CODE SCHOOL (Unique)
StateCodeXREF	Dynamic	COUNTRY (String, 3) STATE (String, 6) COUNTRYCODE (String, 3) STATECODE (String, 6)	COUNTRY STATE (Unique)	COUNTRYCODE STATECODE (Unique)

Note. * PSFT Domain Uniqueness is a suggested parameter. Depending on the Resume Parsing vendor, it should be "Non Unique."

Configuring Static or Dynamic Mapping

You can use the preceding table and content along with these general configuration steps, as well as the static and dynamic mapping examples that follow, to assist you in defining your mapping setup.

To configure either static or dynamic mapping:

1. Select Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps.
2. On the Elements page, inform the field names, types and lengths for all of the domains.

   The field name, type and length must match the system specifications for each domain.

   For example, under the PSFT domain, the field name, type and length must exactly match the record that you used as the information source.

   In the preceding table, the field name, type and length under PSFT Domain came from the actual system. While the field name, type and length under HRXML Domain is sample data that can vary from vendor to vendor.

   Note. The mappings in the preceding table are available to use but are *optional*. If you map just a few, the Resume Parsing process works without errors, but only for the fields that you mapped.

3. On the Domains page, select the corresponding field under each domain.

Note. You must name at least two parties as domains. One for the PeopleSoft system, and the others for the additional component (third-party) systems.

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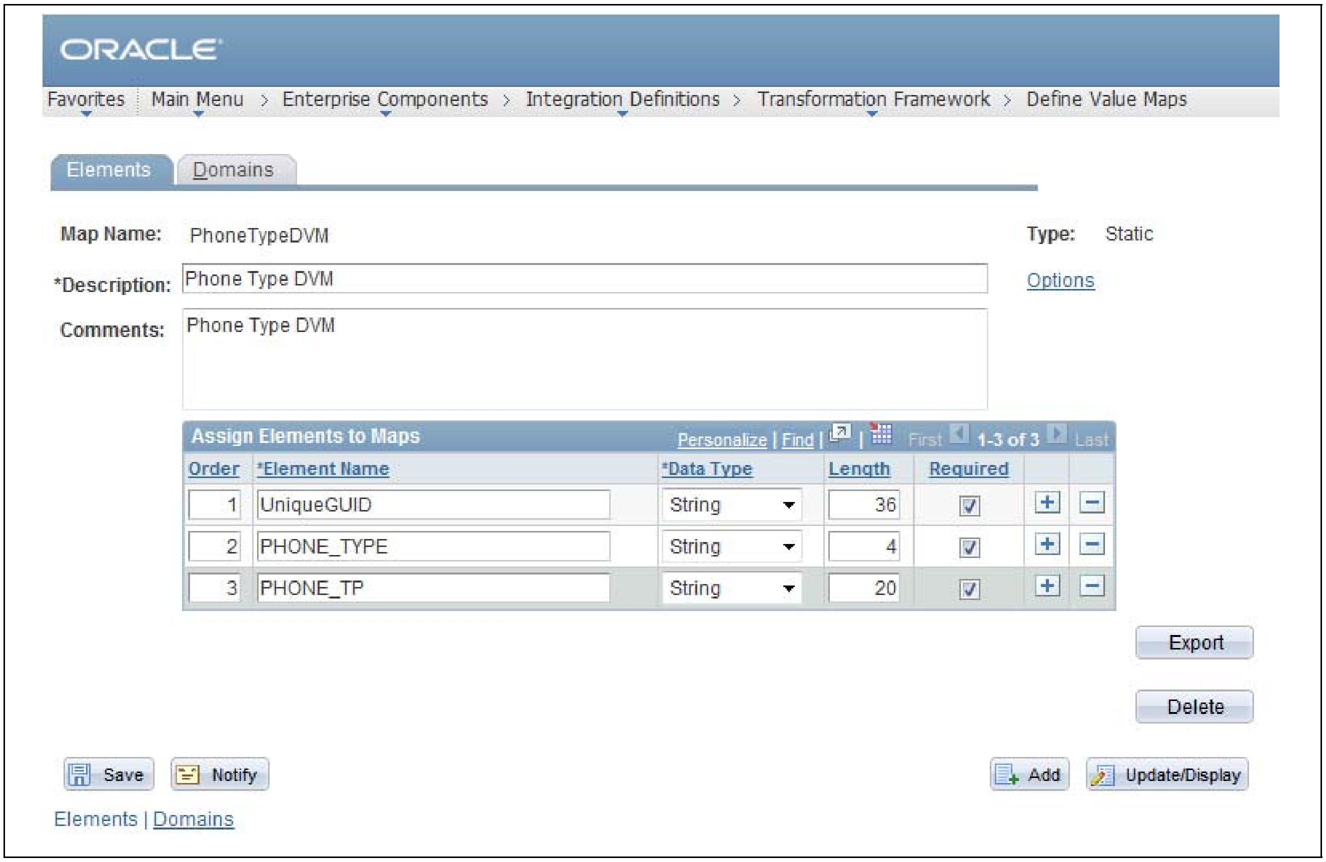
4. Repeat these steps for each map.

The following shows a Static Map example of the Elements page:



Example of a Static Map - Elements page (1 of 2)

The preceding Static Map example of the Elements page (1 of 2) contains the following fields and example values:

- Map Name — PhoneTypeDVM.
- Description — Enter a description for this map name.

  For example: *PhoneTypeDVM*
- Comments — PhoneTypeDVM.

  The Assign Elements to Maps group box contains the following fields and example values:
- Order—enter the sequence order.

  For example: *1*
- Element Name—enter the name of the element.

  For example: *UniqueGUID*
- Data Type—select the data type from the drop-down list box.

For example: *String*

- Length—enter the character length.

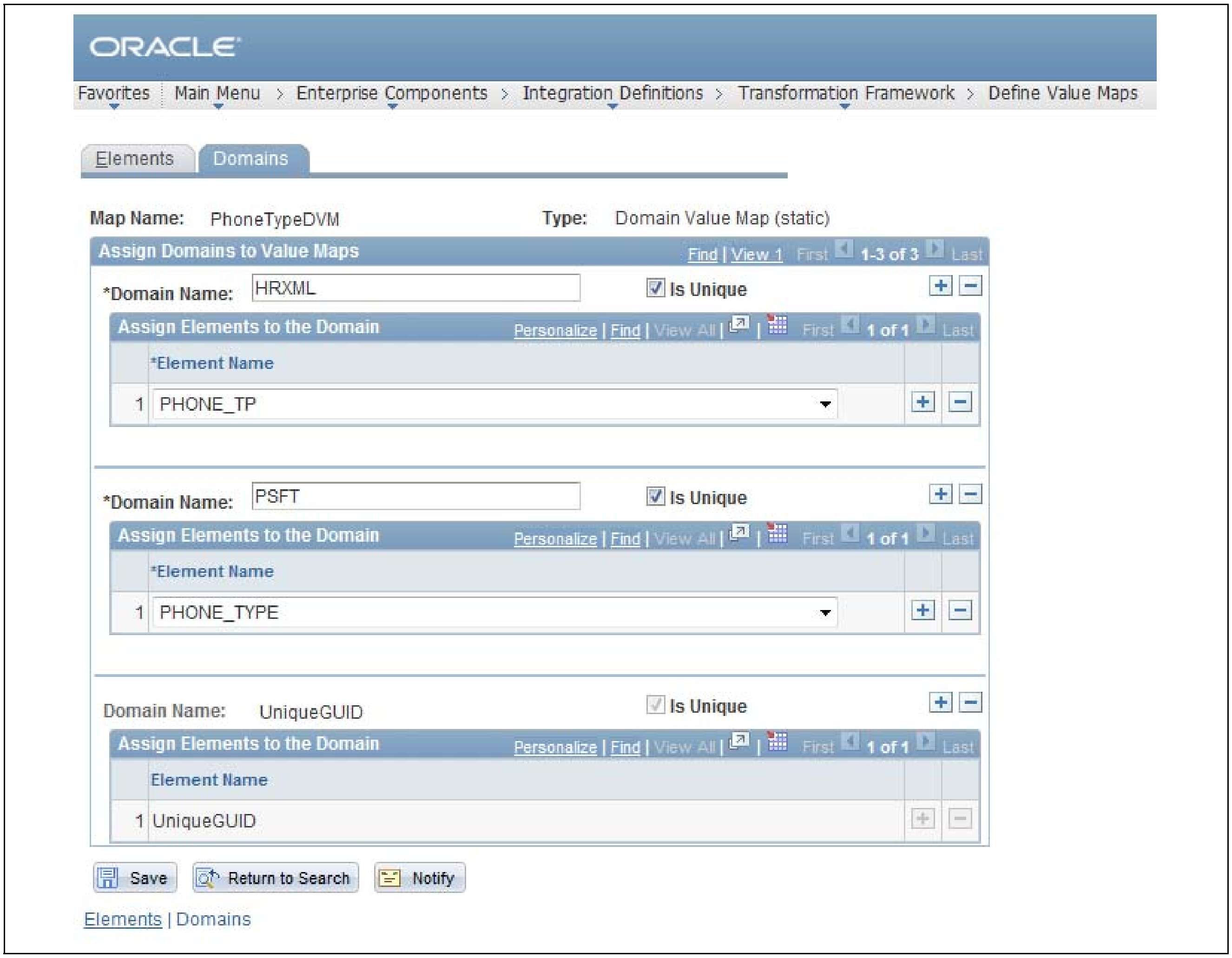
  For example: *36*

- Required—select/clear the check box.

  This example shows the Required check box selected.

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to Maps group box).

The following shows a Static Map example of the Domains page:



Example of a Static Map - Domains page (2 of 2)

The preceding Static Map example of the Domains page (2 of 2) contains the following fields and example values:

- Map Name — PhoneTypeDVM.
- Type—Domain Value Map (static)

  The Assign Domains to Value Maps group box contains the following fields and example values:

- Domain Name—enter the name of the domain.

For example: *HRXML*

- Is Unique—select/clear check box.

  This example shows the Is Unique check box selected.

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Domains to Value Maps group box).

  The Assign Elements to the Domain group box contains the following fields and example values:

- Element Name—select an element name from the drop-down list box.

  For example: *PHONE_TP*

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to the Domain group box).

- Domain Name—enter the name of the domain.

  For example: *PSFT*

- Is Unique—select/clear check box.

  This example shows the Is Unique check box selected.

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to the Domain group box).

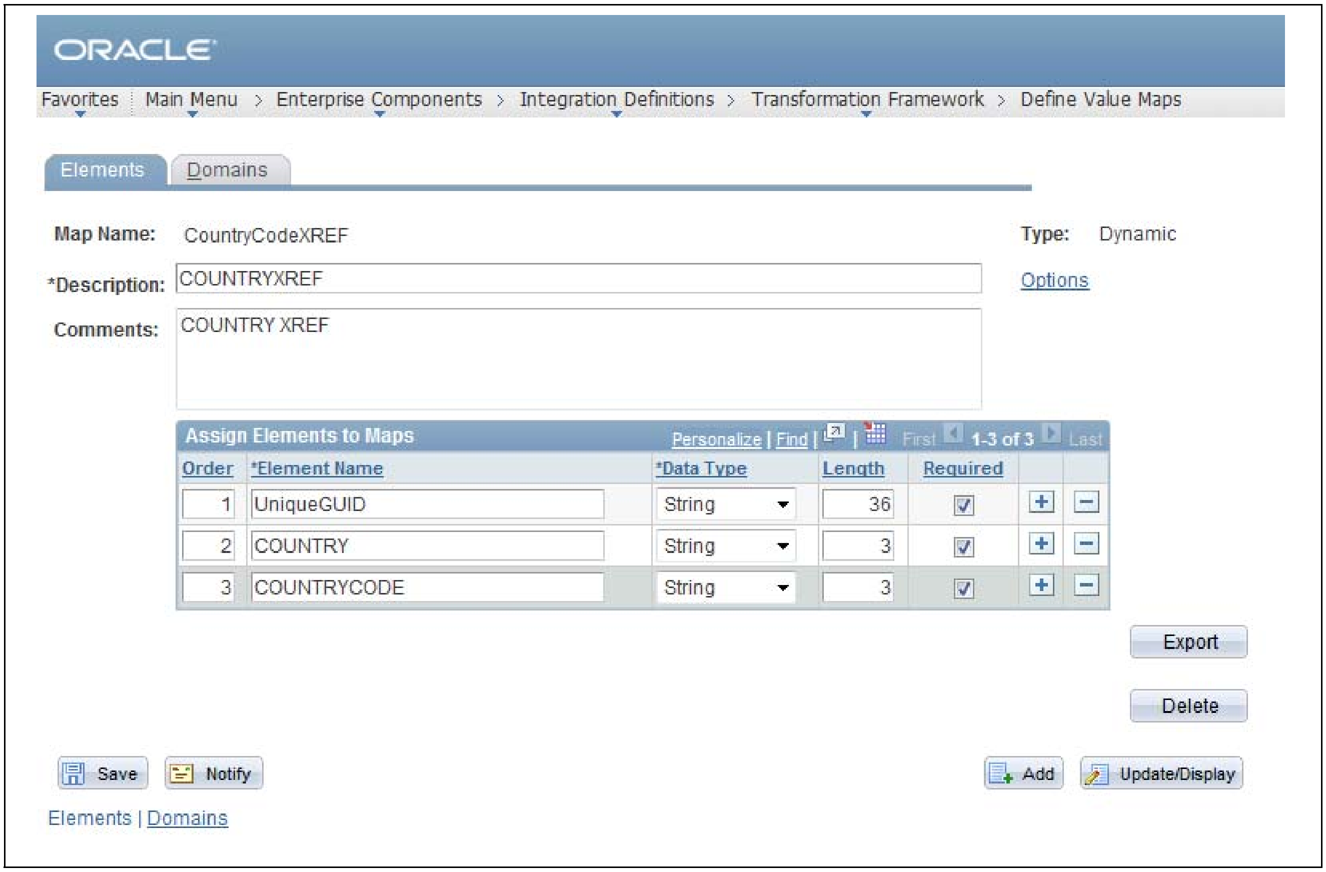
  The Assign Elements to the Domain group box contains the following fields and example values:

- Element Name—select an element name from the drop-down list box.

  For example: *PHONE_TYPE*

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to the Domain group box).

The following shows a Dynamic Map example of the Elements page:



Example of a Dynamic Map - Elements page (1 of 2)

The preceding Dynamic Map example of the Elements page (1 of 2) contains the following fields and example values:

- Map Name — CountryCodeXREF.
- Type—Dynamic.
- Description — Enter a description for this map name.

  For example: *CountryCodeXREF*
- Comments — CountryCodeXREF.

  The Assign Elements to Maps group box contains the following fields and example values:
- Order—enter the sequence order.

  For example: *1*
- Element Name—enter the name of the element.

  For example: *UniqueGUID*
- Data Type—select from the drop-down list box.

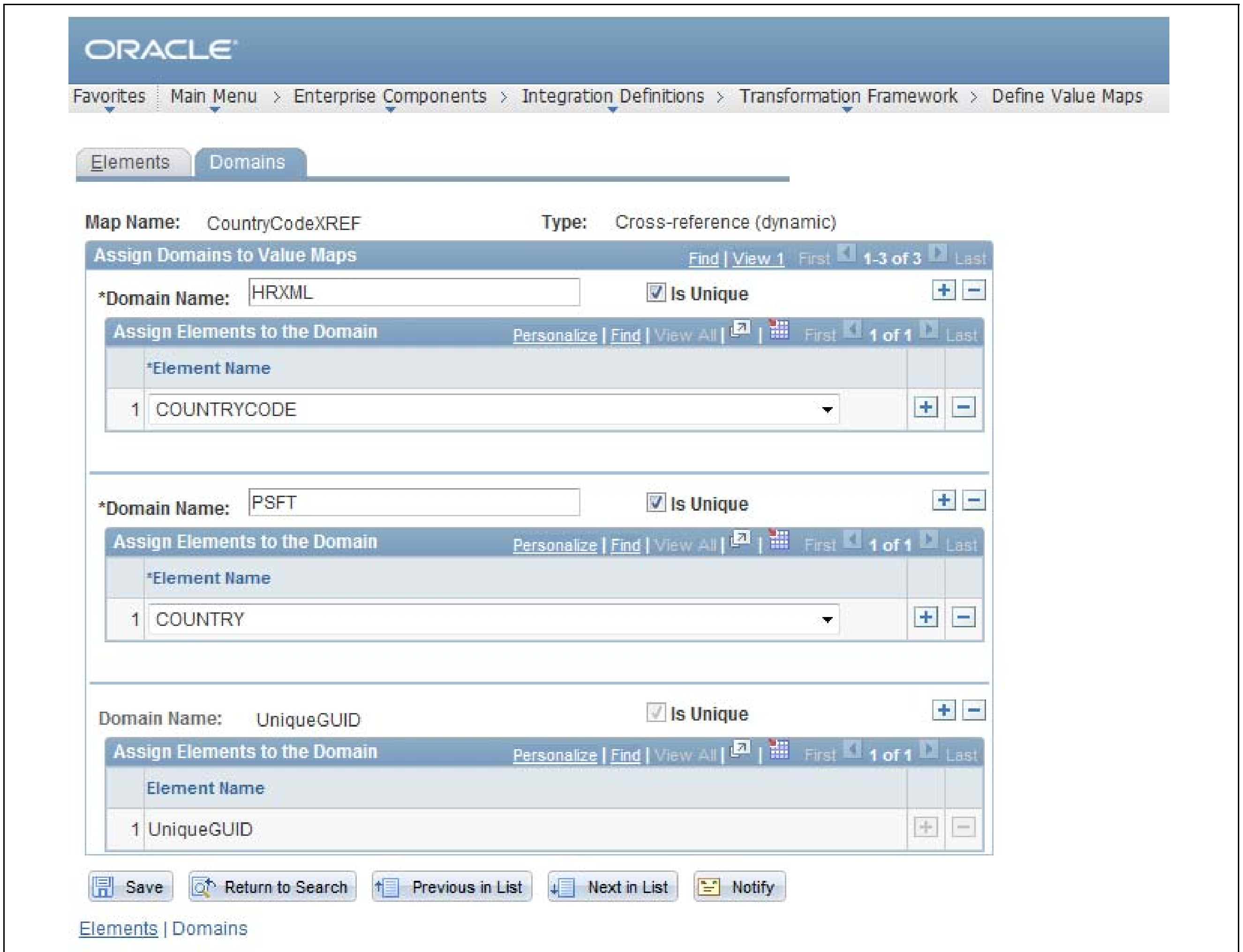
  For example: *String*
- Length—enter the character length.

  For example: *36*
- Required—select/clear the check box.

This example shows the Required check box selected.

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to Maps group box).

The following shows a Dynamic Map example of the Domains page:



Example of a Dynamic Map - Domains page (2 of 2)

The preceding Dynamic Map example of the Domains page (2 of 2) contains the following fields and example values:

- Map Name — CountryCodeXREF.
- Type—Cross-reference (dynamic)

  The Assign Domains to Value Maps group box contains the following fields and example values:

- Domain Name—enter the name of the domain.

  For example: *HRXML*

- Is Unique—select/clear check box.

  This example shows the Is Unique check box selected.

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Domains to Value Maps group box).

  The Assign Elements to the Domain group box contains the following fields and example values:

- Element Name—select an element name from the drop-down list box.

  For example: *COUNTRYCODE*

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to the Domain group box).
- Domain Name—enter the name of the domain.

  For example: *PSFT*

- Is Unique—select/clear check box.

  This example shows the Is Unique check box selected.

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to the Domain group box).

  The Assign Elements to the Domain group box contains the following fields and example values:

- Element Name—select an element name from the drop-down list box.

  For example: *COUNTRY*

- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values (in the Assign Elements to the Domain group box).

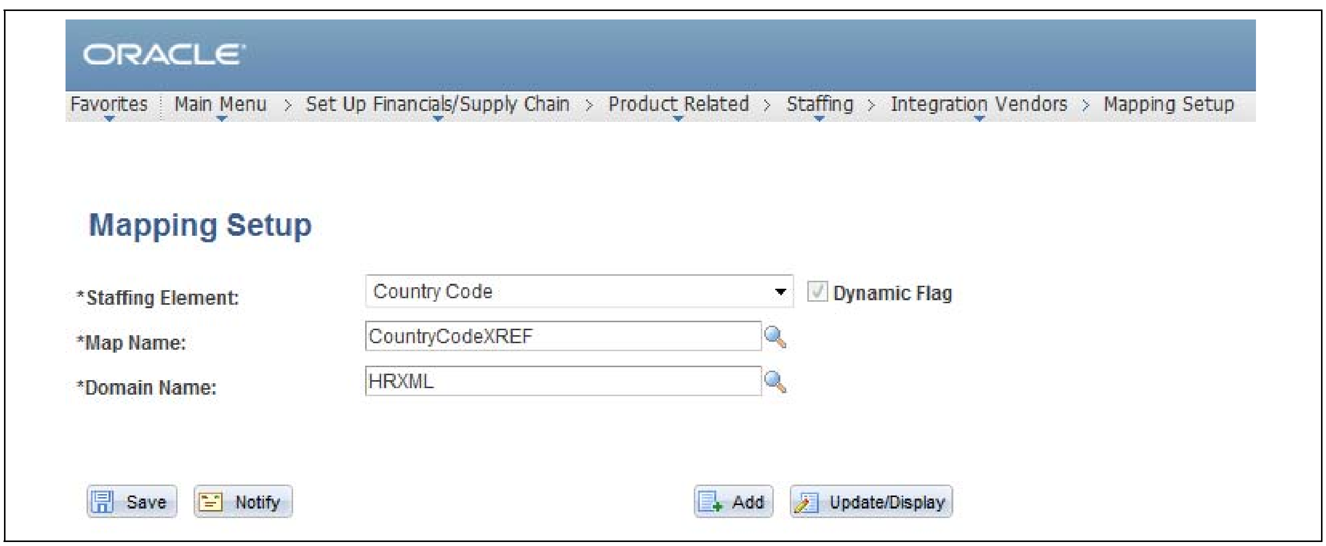
Task 13-3-4: Assigning Mapping Setups

You must assign the mapping setups for all of the maps that you want PeopleSoft Staffing to use.

To assign the mapping setups for the maps:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Vendors, Mapping Setup.

   The Open Integration Framework - Mapping Setup page appears, as shown in the following example:



Mapping Setup page

2. On the Mapping Setup page, in the Staffing Element field, select the Staffing element that you want to use from the drop-down list box.

   For example: *Country Code*

   The staffing element is system data.

3. In the Map Name field, click the look up button to search for and select the map name that you want to use.

   For example: *CountryCodeXREF*

   In previous setup steps, you created the available map names.

4. In the Domain Name field, click the look up button to search for and select the domain that you want to use.

   For example: *HRXML*

   In previous setup steps, you created the available domain names.

5. Click Save.

6. Repeat the preceding steps to assign mapping setups for all of the maps that you want PeopleSoft Staffing to use.

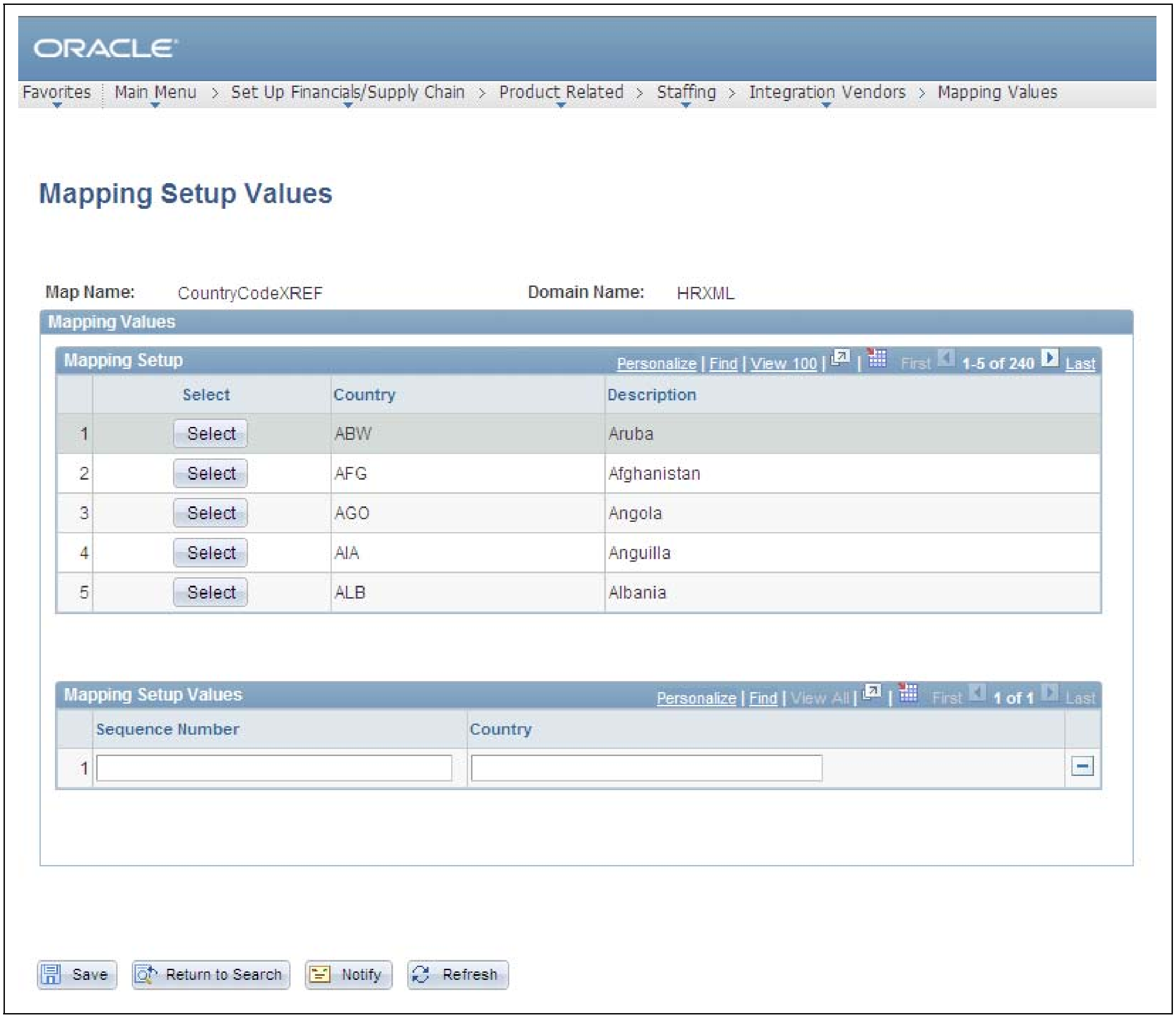
Task 13-3-5: Defining Mapping Values

You must define the corresponding values for all of the maps that you want PeopleSoft Staffing to use.

To define the corresponding values for the maps:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Vendors, Mapping Values.

   The Open Integration Framework - Mapping Setup Values page appears, as shown in the following example:



Mapping Setup Values page

2. On the Mapping Setup Values page, in the Mapping Setup group box, click the Select button next to each mapping setup to define the mapping values.

   The Mapping Setup Values group box displays to allow editing of the sequence number and country for the mapping setups that you select.

3. Edit the sequence and country as you desire.

4. Click Save.

5. Repeat the preceding steps to define mapping values for all of the maps that you want PeopleSoft Staffing to use.

Note. Before you can use the Resume Parsing feature, you must define the vendor by selecting Set Up Financials/Supply Chain, Product Related, Staffing, Integration Vendors, Vendor Integration Setup.

For additional information on installation options, vendor setup and mapping configuration, refer to the PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 suite of PeopleBooks:

See *PeopleSoft Staffing Front Office 9.1 PeopleBook,* "Setting Up Resume Parsing."

CHAPTER 14

Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management

This chapter discusses:

- Understanding PeopleSoft Transaction Billing Processor and PeopleSoft CRM Integration
- Turning On and Activating the Integration Queues
- Turning On and Activating the Integration Services and Routings
- Transforming the Contract Transaction Service

Understanding PeopleSoft Transaction Billing Processor and PeopleSoft CRM Integration

The following instructions detail the process for integrating PeopleSoft 9.1 Transaction Billing Processor (TBP) with the PeopleSoft 9.1 Customer Relationship Management (CRM) database. PeopleSoft TBP functionality is also used by PeopleSoft Real Estate Management (REM); however, being in the same database does not require any additional setup.

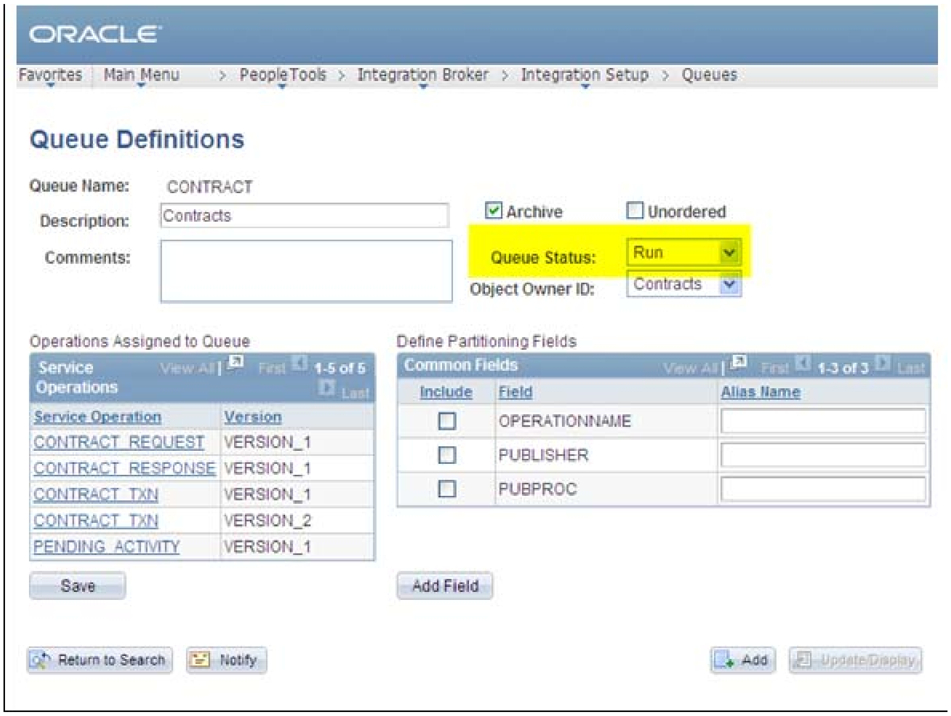
Perform the tasks that follow only if you want to integrate your PeopleSoft FSCM and PeopleSoft CRM databases.

Task 14-1: Turning On and Activating the Integration Queues

To turn on the integration queues (channels):

1. Sign in to the PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.
3. On the Queues search page, search for and select the queue name *CONTRACT*.

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

4. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
5. Click Save.

Task 14-2: Turning On and Activating the Integration Services and Routings

You must activate the following four services:

- CONTRACT_REQUEST (Asynchronous)
- CONTRACT_RESPONSE (Asynchronous)
- CONTRACT_TXN (VERSION_2) (Asynchronous)
- PENDING_ACTIVITY (Synchronous)

For each of these service operations, the PeopleSoft system delivers routings. For example, the PeopleSoft system delivers a routing named CONTRACT_REQUEST for the service operation CONTRACT_REQUEST with the default Sender node as PSFT_CR and the default Receiver node as PSFT_EP.

However, Sender and Receiver nodes are *only* editable when the new routing is being created. After the routings have been created and saved, you cannot modify the Sender and Receiver nodes.

Therefore, new routings may need to be created in order to edit your Sender and Receiver nodes. Multiple routing instances can be created with different names for the same service operation. In the case detailed in the following steps, CONTRACT_REQUEST is one instance and CONTRACT_REQUEST1 is another instance.

The following lists and briefly describes the three methods you can use to configure your nodes, since the PeopleSoft-delivered routings have already been created and the nodes are not editable:

- Configure the nodes PSFT_CR and PSFT_EP with the valid databases so that the Sender Node PSFT_CR and Receiver Node PSFT_EP are valid and functional.
- Create a *new* routing instance of the service operation with a different name (CONTRACT_REQUEST1 as shown in the steps that follow) and then supply the proper Sender and Receiver nodes (which is a prerequisite listed at the start).

Note. Creating a new routing instance of the service operation with a different name is the method that is detailed in the steps that follow. If you use one of the other methods, verify that the correct routings are active by selecting PeopleTools, Integration Broker, Integration Setup, Services. Open each service operation and select the Routings tab to see their status.

- Delete the PeopleSoft system-supplied routing (CONTRACT_REQUEST) and then create a new instance of the service operation.

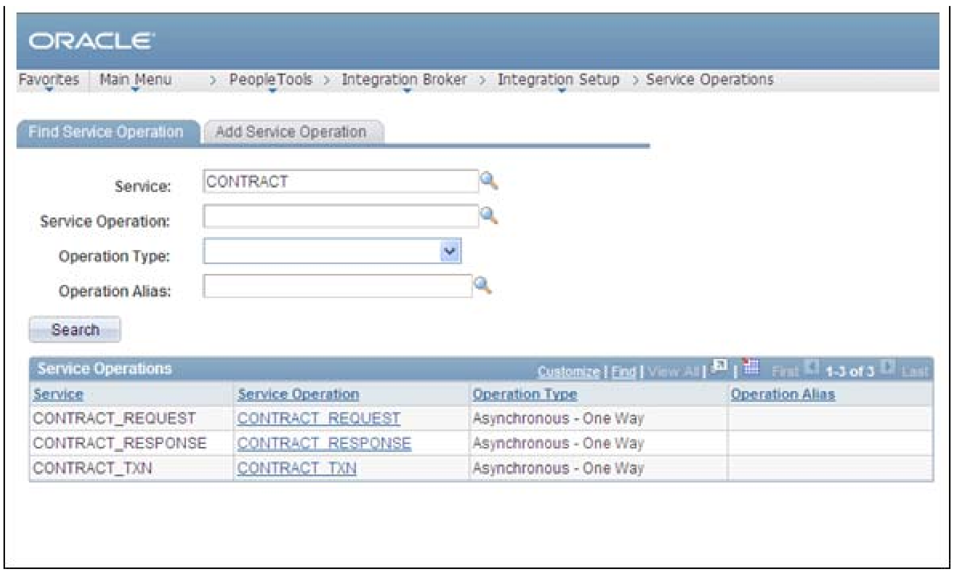
To activate the integration services (messages):

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Services.
3. On the Services search page, search for the service name *CONTRACT_REQUEST*.
4. Do one of the following to open and activate the service operation:

   a. Directly open the service operation.

   Select PeopleTools, Integration Broker, Integration Setup, Service Operations and search for the service operation *CONTRACT_REQUEST*.

   You can choose to filter through the Service Name or Service Operation, as shown in the following example:

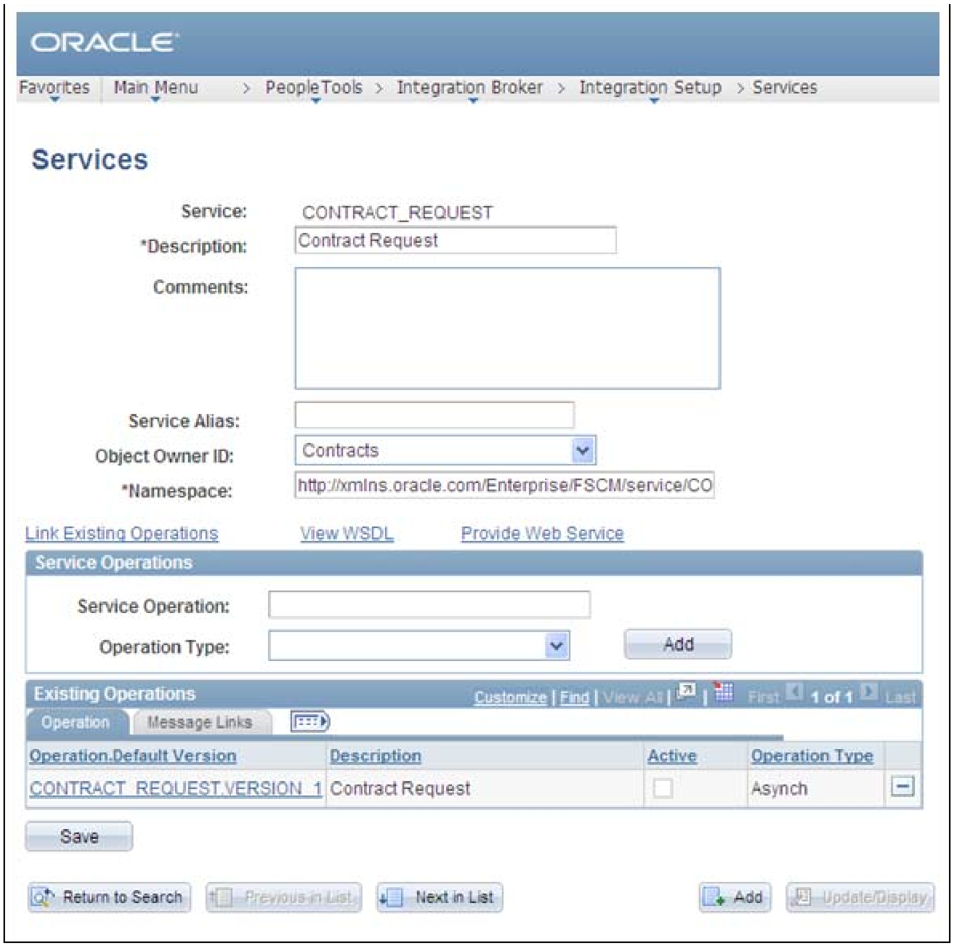


Find Service Operation page

   b. Open a service and then open its corresponding service operation.

   Each Service has a corresponding PeopleSoft-delivered service operation. For each of the service operations listed, you can open the service that has the same name.

Select PeopleTools, Integration Broker, Integration Setup, Services, and search for the service operation *CONTRACT_REQUEST*, as shown in the following example:

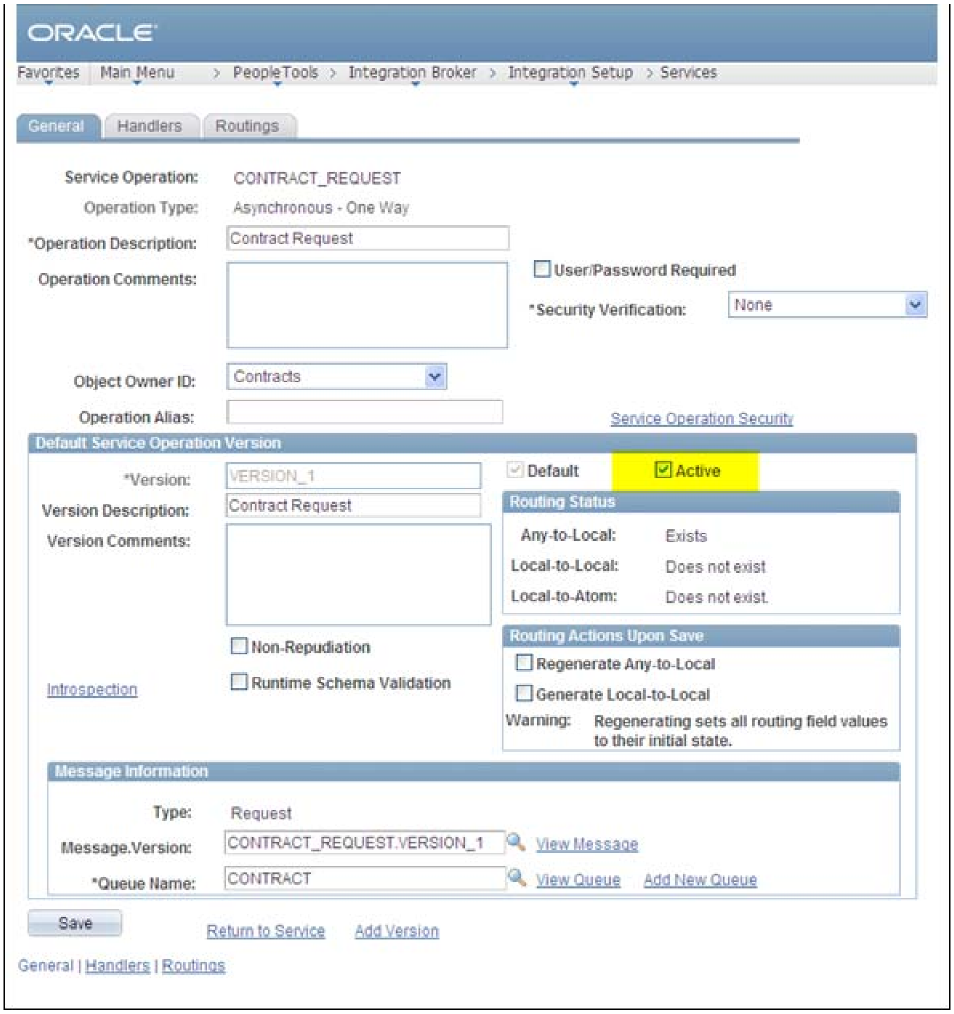


Services - Contract Request page

Select the CONTRACT_REQUEST.VERSION_1 link in the Operation tab of the Existing Operations grid that lists the Default Version. This link opens the service operation.

After a service operation is opened using either of these options, you can activate and configure the same.

5. On the General page, select the Active check box, as shown in the following example:

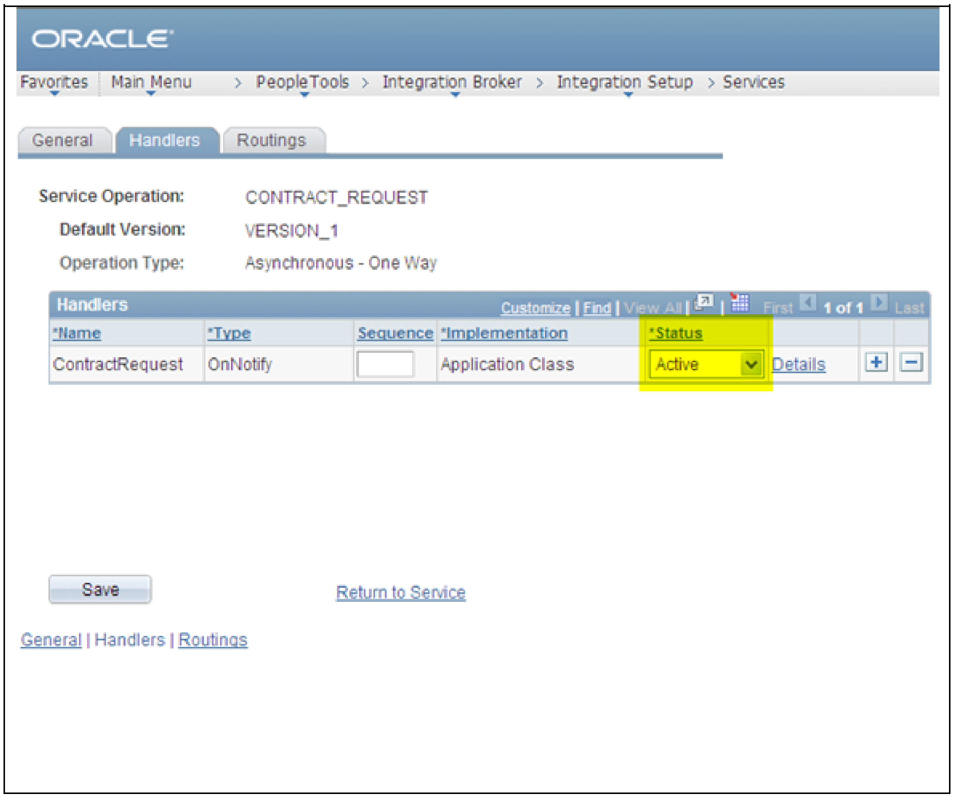


Contract Request page - General tab

6. Click Save.
7. Select the Handlers tab to access the Handlers page.
8. On the Handlers page, if there are any handlers, select *Active* from the Status drop-down list box.

   In the example that follows, the status has been set to *Active* for the handler name *ContractRequest*.

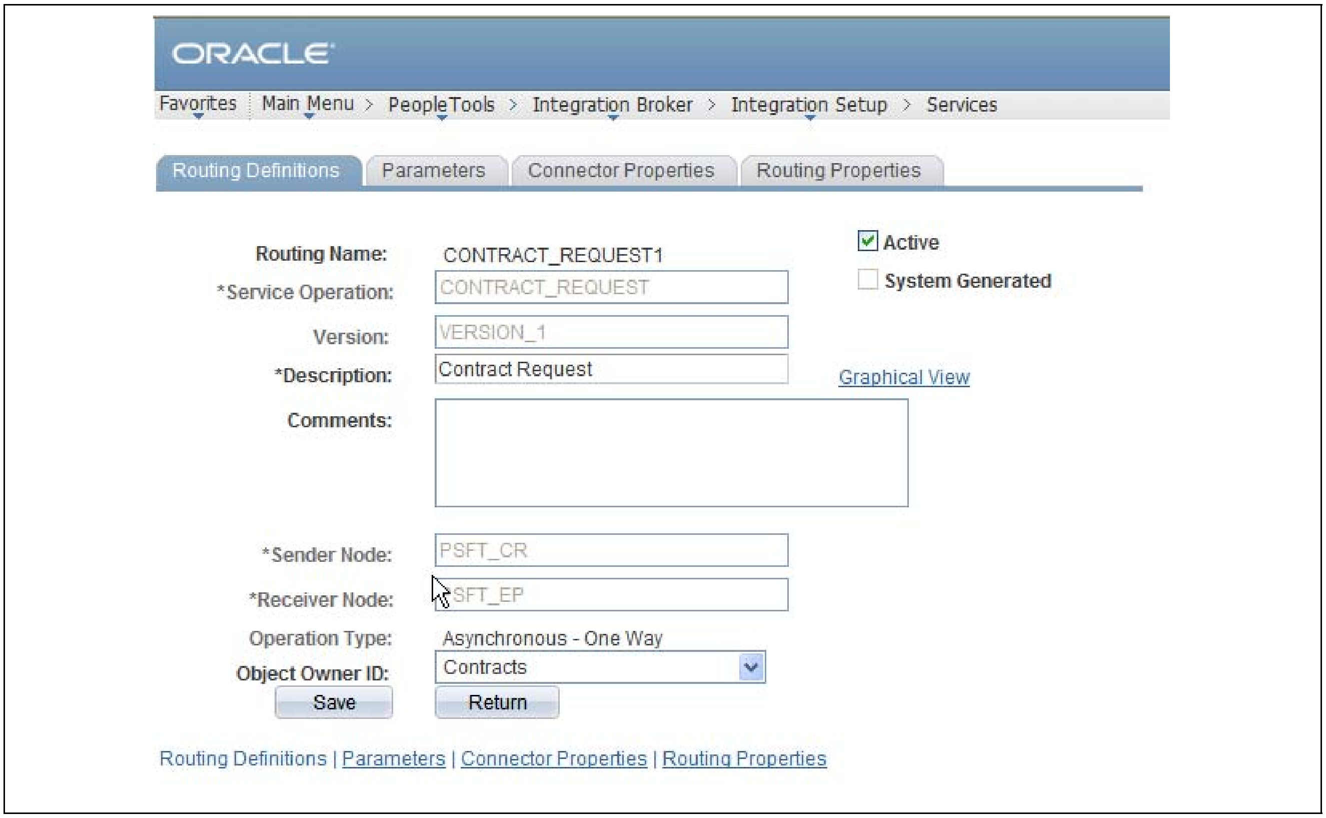
Note. CONTRACT_REQUEST and CONTRACT_TXN have handlers defined in PeopleSoft FSCM for Contracts.



Contract Request page - Handlers tab

9. Select the Routings tab to access the Routings page.
10. On the Routings page, in the Routing Name field, enter a value such as *CONTRACT_REQUEST1*.
11. Click the Add (+) button to add the routing.

    The Routing Definitions page for the new routing CONTRACT_REQUEST1 appears.
12. Review the following example and prerequisite details before you configure the new routing definition in the steps that follow:



Routing Definitions page

As a prerequisite, you must know which databases are being integrated. In the example of CONTRACT_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT_RESPONSE, the receiver node is the PeopleSoft CRM database.

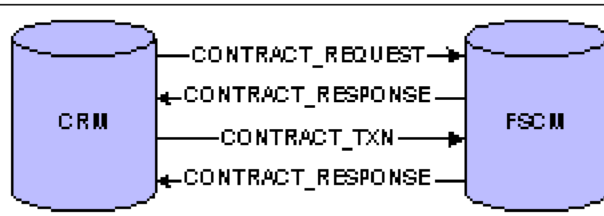
The service operations (messages) flow as follows:

PeopleSoft CRM sends CONTRACT_REQUEST to PeopleSoft FSCM.

PeopleSoft FSCM sends CONTRACT_RESPONSE to PeopleSoft CRM.

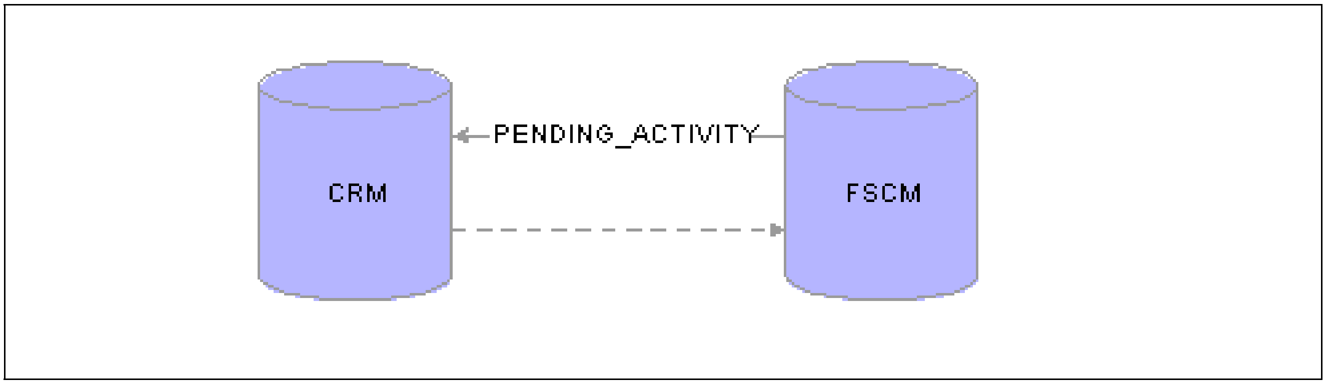
For Recurring and One-Time transactions, this message is sent only once. For On-Demand Transactions, the system sends this message for a second time after the Contracts Billing Interface (CA_BI_INTFC) process completes, to provide the status of the transactions to PeopleSoft CRM.

PeopleSoft CRM sends CONTRACT_TXN to PeopleSoft FSCM, as shown in the following diagram:



Database integration

The PENDING_ACTIVITY service operation is sent from PeopleSoft FSCM to PeopleSoft CRM, as shown in the following diagram, where the system is configured for synchronous messages. The message identifies whether any pending activities exist for a contract Revenue Plan or Billing Plan. The message is triggered when the status of a Billing Plan or Revenue Plan is changed to complete.



Pending Activity

Note. If the node fields are grayed out and unavailable for edit, you can create a new routing and configure that routing with the nodes that you are configuring.

---

13. Use the preceding example and prerequisite details to configure the new routing definition as follows:
    a. Select the Active check box.
    b. In the Sender Node field, enter the correct sender node.
    c. In the Receiver Node field, enter the correct receiver node.
    d. In the Object Owner ID field, enter the correct object owner ID if applicable.

    Note. In the PeopleSoft FSCM database, the Object Owner ID is always *Contracts*.

    ---

    e. Click Save.
14. Repeat the preceding steps for the following service operations (messages):
    - CONTRACT_RESPONSE
    - CONTRACT_TXN (VERSION_2)
    - PENDING_ACTIVITY

Task 14-3: Transforming the Contract Transaction Service

PeopleSoft Contracts in PeopleSoft FSCM uses CONTRACT_TXN version 2 for all the processing related to PeopleSoft Transaction Billing Processor. PeopleSoft CRM uses CONTRACT_TXN version 1. The default version is version 1 in PeopleSoft CRM whereas it is version 2 in PeopleSoft FSCM. Due to the difference in the versions of the same message there is a need to set up the transformation of incoming message version 1 from PeopleSoft CRM to version 2 in PeopleSoft FSCM.

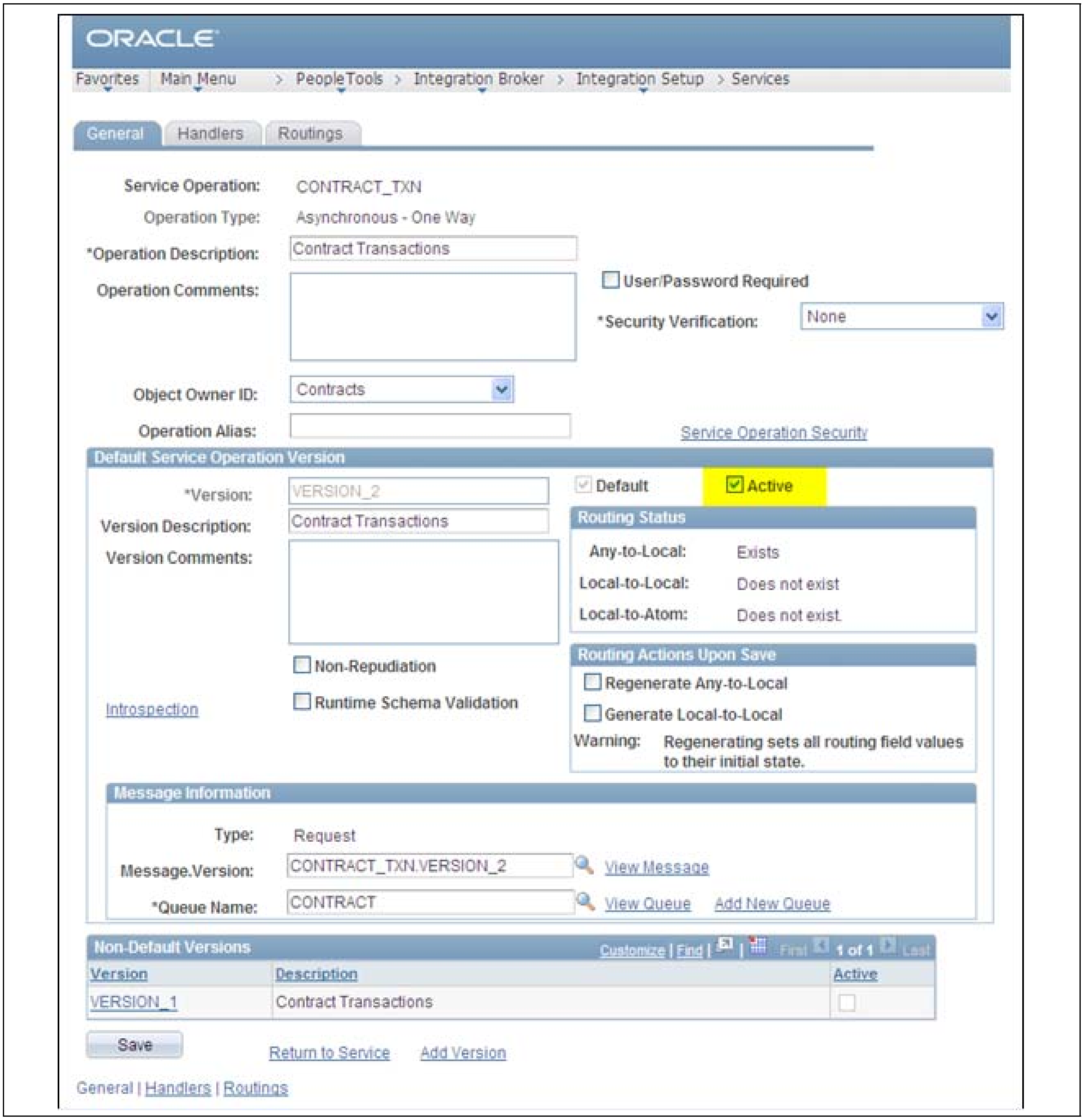
You need to open the CONTRACT_TXN Service Operation (Message) properties and activate the non-default version 1 of the message (you have already activated the default version 2 in earlier steps). Both versions must be active in order for the transformation to work correctly.

To open the CONTRACT_TXN Service Operation (Message) properties and activate the non-default version 1:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations and search for service operation *CONTRACT_TXN*.

Alternatively, select PeopleTools, Integration Broker, Integration Setup, Services, and search for service operation *CONTRACT_TXN*. Then click the CONTRACT_TXN.VERSION_2 link in the Operation tab of the Existing Operations area.

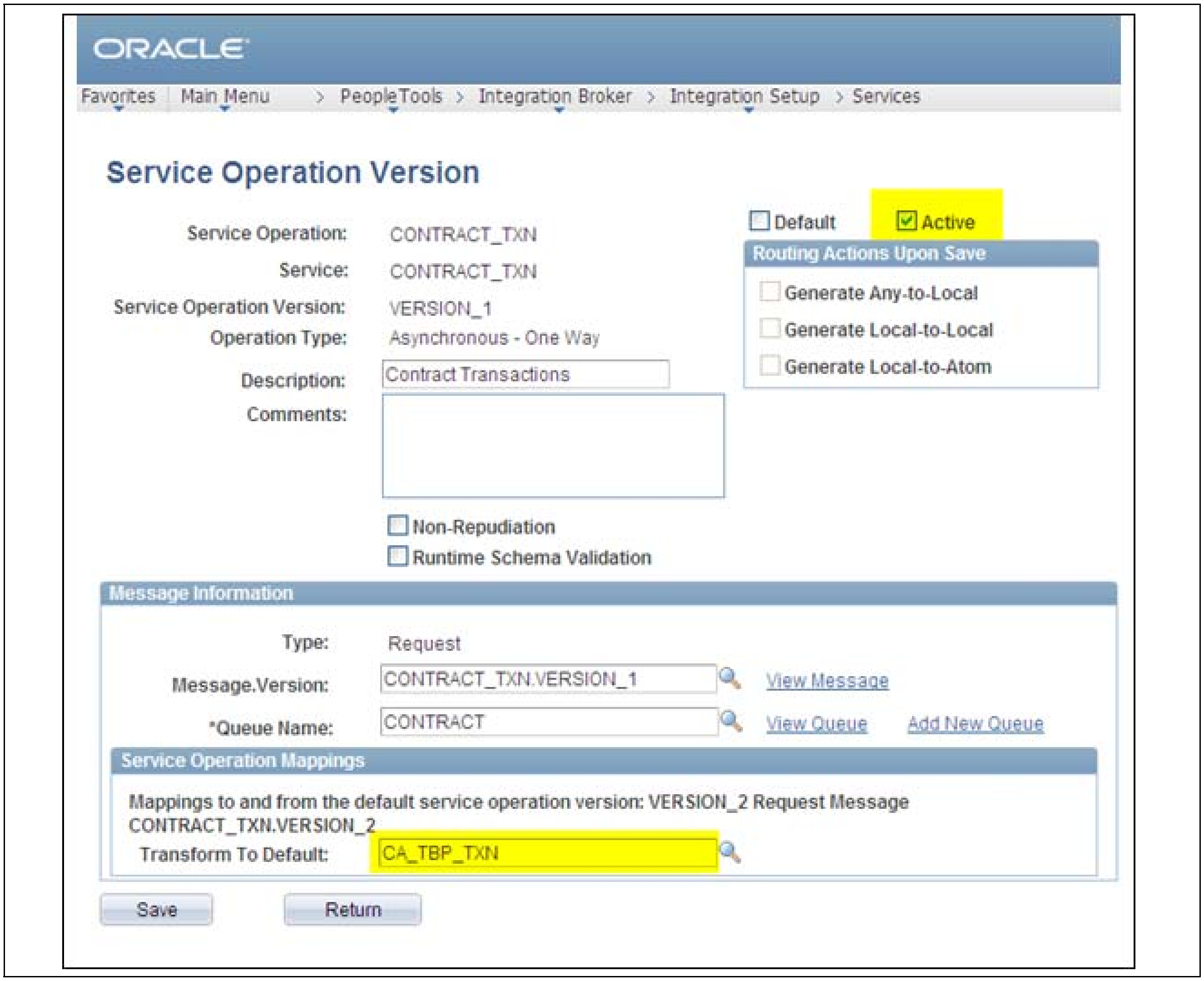
The Service Operation page for CONTRACT_TXN appears, as shown in the following example:



Service Operations page for CONTRACT_TXN

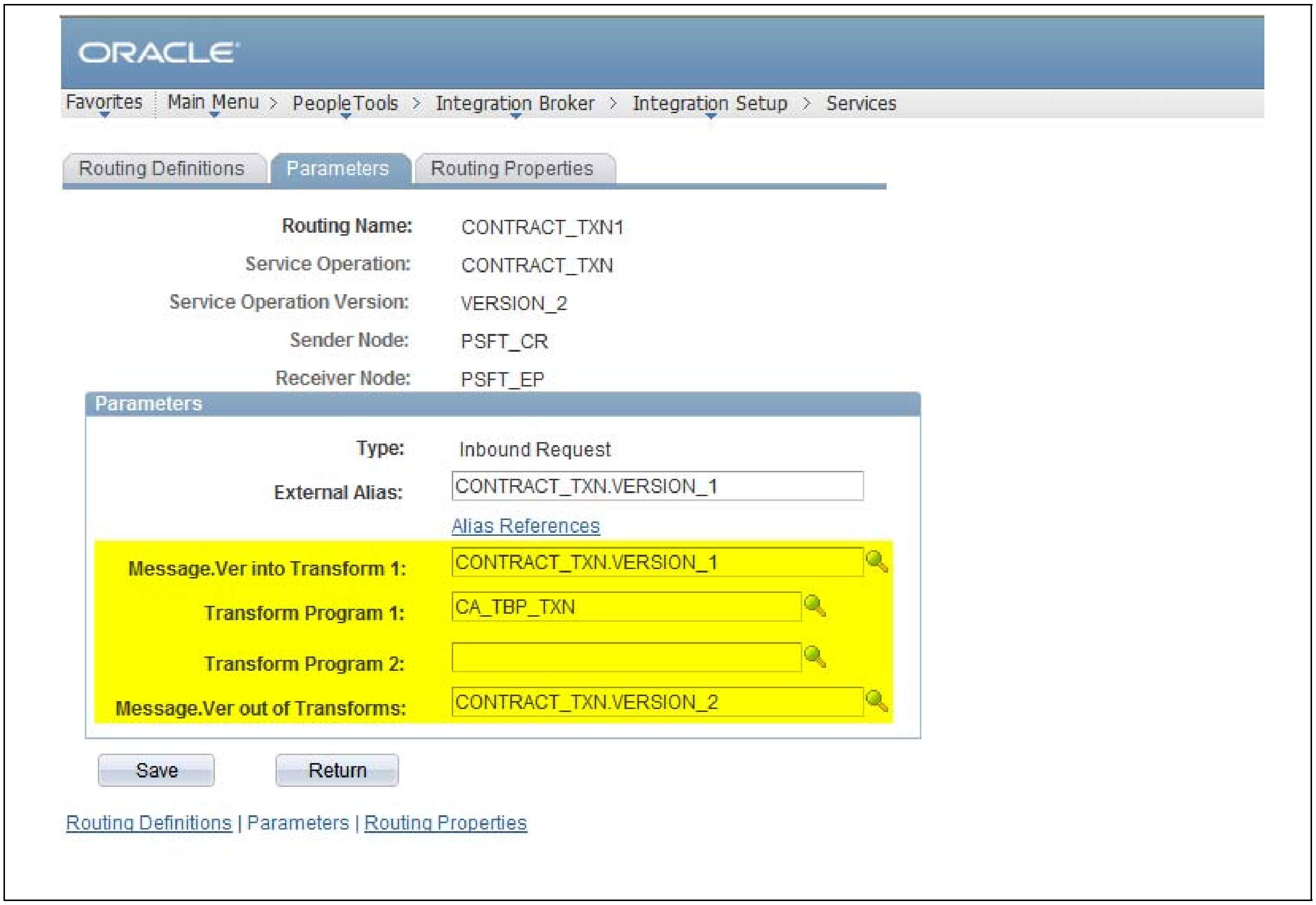
2. On the Service Operations - General page, in the Non-Default Versions group box, click the VERSION_1 link to open the Non-Default Version – VERSION_1 page for the CONTRACT_TXN.

3. Enter the values, as shown in the following example:



Service Operation Version page

4. Select the Active check box to activate the service operation.
5. In the Service Operation Mappings group box, in the Transform to Default field, enter *CA_TBP_TXN*.
6. Click Save.
7. Select the Routings tab to access the Routings page..
8. On the Routings page, select the routing link that you added or activated in the previous task.
9. Select the Parameters tab to access the Parameters page.
10. On the Parameters page, in the Application Engine name field, enter *CA_TBP_TXN* for Transform Program 1.
11. In the External Alias field, enter *CONTRACT_TXN.VERSION_1*.
12. In the Message.Ver into Transform 1 field, enter *CONTRACT_TXN.VERSION_1*.
13. In the Message.Ver out of Transforms field, enter *CONTRACT_TXN.VERSION_2*, as shown in the following example:



Parameters page

14. Click Save.
15. Clear the application server and web server cache before using the system.

The installation of PeopleSoft Transaction Billing Processor 9.1 for PeopleSoft FMS is now complete.

See *PeopleSoft CRM 9.1 Services Foundation PeopleBook*, "Setting Up an Integration to the Transaction Billing Processor."

CHAPTER 15

Installing PeopleSoft 9.1 Maintenance Management with Microsoft Project 2007

This chapter discusses:

- Prerequisites
- Installing PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine
- Installing Microsoft Project 2007
- Configuring the Microsoft Project Integration Process

Prerequisites

This chapter details the installation to integrate PeopleSoft Maintenance Management with Microsoft Project 2007. The integration software requires that you previously install and configure the following items:

- You must have a process scheduler server set up on a Microsoft Windows machine to run against the PeopleSoft 9.1 Maintenance Management database.

  The integration with Microsoft Project 2007 uses a PeopleSoft Process Scheduler server to communicate with Microsoft Project 2007.
- The Microsoft Project 2007 software must be installed on the process scheduler server.

Important! It is important that you perform the tasks in this chapter in the order provided.

Task 15-1: Installing PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine

Follow the standard installation instructions to install PeopleSoft PeopleTools on a Microsoft Windows machine, and then configure the machine as a process scheduler to connect to the PeopleSoft 9.1 FSCM database where the Maintenance Management product resides.

Task 15-2: Installing Microsoft Project 2007

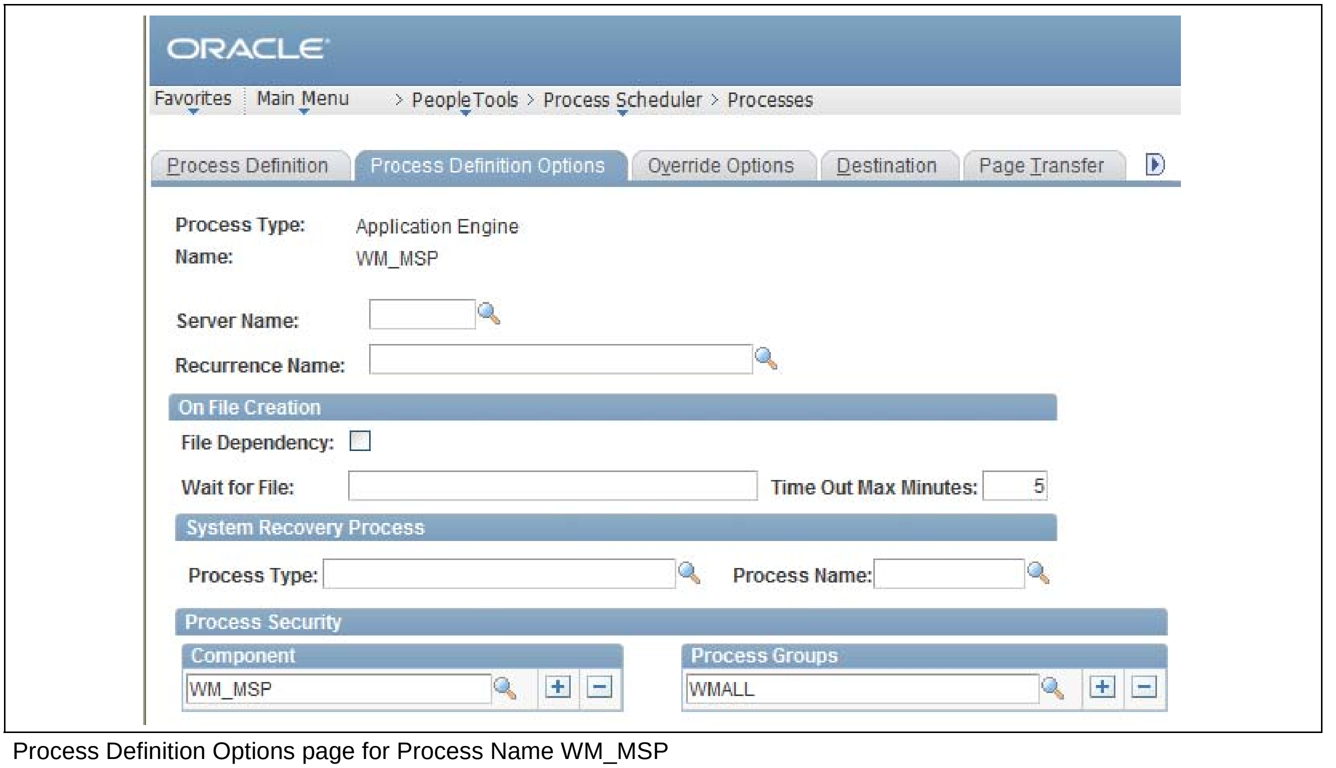
Install Microsoft Project 2007 on the same Microsoft Windows machine where the process scheduler server is installed.

Note. Caution! You should NOT install the PeopleSoft-Microsoft Project Integrator on the process scheduler that runs the Maintenance Management's Microsoft Project integration.

Task 15-3: Configuring the Microsoft Project Integration Process

To configure the integration process:

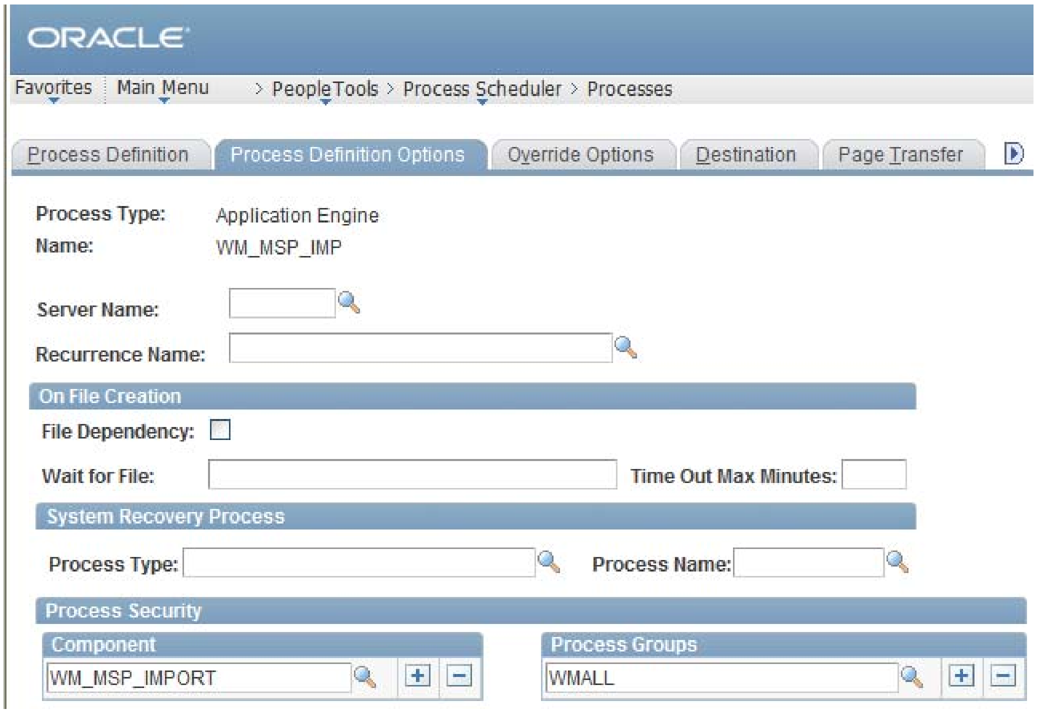
1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Process Scheduler, Processes.
3. On the Process search page, search for and select the process name *WM_MSP*.
4. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.
5. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:



Process Definition Options page for Process Name WM_MSP

6. Click Save.
7. Select PeopleTools, Process Scheduler, Processes.

8. On the Process search page, search for and select the process name *WM_MSP_IMP*.
9. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.
10. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler that you configured in the task titled “Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine,” as shown in the following example:



Process Definition Options page for Process Name WM_MSP_IMP

11. Click Save.

Chapter 16

Installing PeopleSoft Maintenance Management 9.1 Work Order Attachment Print

This chapter discusses:

- Understanding PeopleSoft Work Order Attachment Print
- Prerequisites
- Verifying the URLs and the Installation Location
- Enabling the PeopleSoft Work Order Attachment Print Features

Understanding PeopleSoft Work Order Attachment Print

PeopleSoft Maintenance Management Work Order Attachment Print utilizes the printing capabilities of many additional component (third-party) applications that support printing files from a command-line interface. Depending on which additional component application for printing attachments you choose, this may include printing a variety of documents that you may have created using Microsoft Office, such as Microsoft Word, Microsoft PowerPoint, Microsoft Excel, as well as other types of documents such as PDF, TXT, JPEG, GIF and BMP.

Prerequisites

Ensure that you meet the following requirements:

- You have installed an additional component application that allows you to print a list of files of various types to a network printer from a single command-line interface.
- You have installed the additional component application on the PeopleSoft Process Scheduler server that you use to print Work Order Attachments.

  This should be the same process scheduler server that you currently use to print the Work Order Task Details report.
- You are running PeopleSoft PeopleTools 8.52.02 or higher.

Note. An instance of the additional component application cannot be running in memory on the server, except as managed by the PeopleSoft Work Order Attachment Print process.

If the additional component application is provided with a quick-start utility, that utility will typically need to be disabled on the server.

Task 16-1: Verifying the URLs and the Installation Location

This section discusses:

- Modifying the Attachment Print Command URL
- Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory

Task 16-1-1: Modifying the Attachment Print Command URL

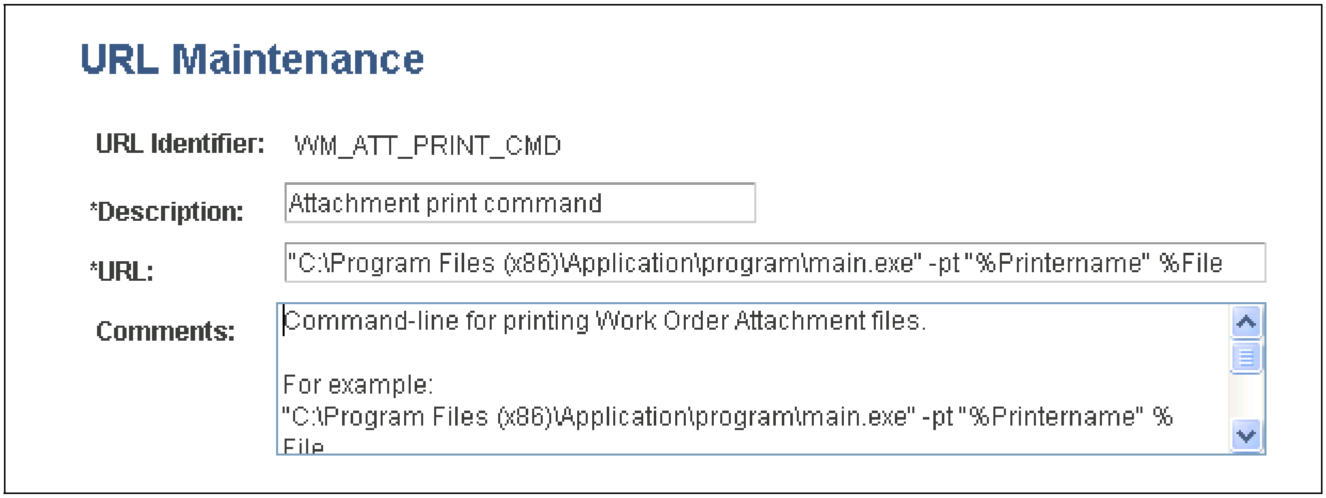
After you install the additional component application, you must update the URL that is used by the PeopleSoft Work Order Attachment Print feature to call the additional component application to print attachments.

The *URL WM_ATT_PRINT_CMD* must point to the appropriate installation location of the primary additional component application's executable file. This file is typically in the subdirectory that contains the majority of the additional component application's binary executables.

To modify the URL for the additional component application's primary executable installation location:

1. Select PeopleTools, Utilities, Administration, URLs.

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



URL Maintenance page - Attachment print command

2. On the URL Maintenance page, in the URL field, modify the example URL to point to your installation location of the additional component application's primary startup executable and appropriate command-line arguments.

   For example: *"C:\Program Files (x86)\Application\program\main.exe" -pt "%Printername" %File*

   In the preceding example, *-pt* is the command-line switch that commands the additional component application to print the list of files to a specified network printer.

3. At runtime the place holder %Printername will be replaced with the network printer name specified in the Output Destination field on the Work Order Task - Details Report Options page. The place holder %File will be replaced with a list of the attachment files to be printed.

   For reference, the original example URL is provided in the Comments field of the URL Maintenance page.

Task 16-1-2: Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory

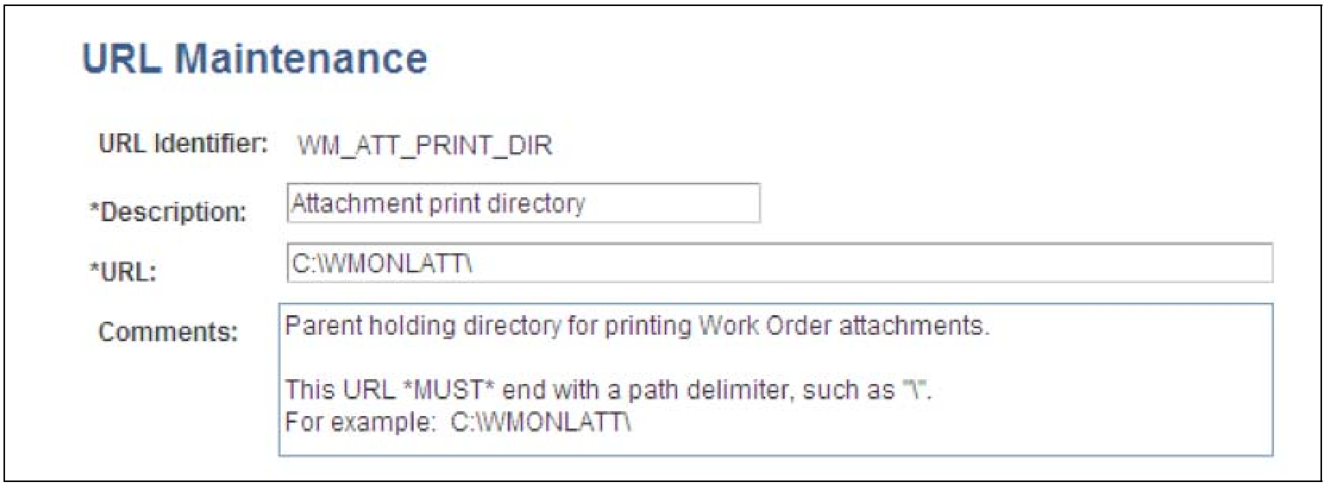
While printing Work Order Attachments, the PeopleSoft Work Order Attachment Print process temporarily downloads the attachments to the server in a holding directory, where they can then be passed on to the additional component application for printing. The URL *WM_ATT_PRINT_DIR* determines the directory to which the Work Order Attachments download. After the attachments print, they are removed from this temporary directory. The PeopleSoft Work Order Attachment Print process automatically creates this directory on the server if it does not already exist.

By default, the URL is set to: *C:\WMONLATT*

To use a different temporary download holding directory on your server, do the following:

1. Select PeopleTools, Utilities, Administration, URLs.

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



URL Maintenance page - Attachment print directory

2. On the URL Maintenance page, modify the default URL *C:\WMONLATT* to the directory that you want to use.

   Note. The \ path delimiter at the end of the Attachment print directory URL is required and must be entered.

Task 16-2: Enabling the PeopleSoft Work Order Attachment Print Features

After you successfully install the additional component application for printing attachments, you must enable the Print Attachments option that is available for your users on the Work Order Task Detail Report Options page.

To enable the Print Attachments feature:

1. Select Set Up Financials/Supply Chain, Install, Installation Options, and then select the Maintenance Management link.

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

Installation Options - Maintenance Management page

2. On the Maintenance Management page, select the option Work Order Attachment Print Installed.

For user set up and implementation information:

See *PeopleSoft Maintenance Management 9.1 PeopleBook*

CHAPTER 17

Integrating PeopleSoft 9.1 Asset Management with eCenterOne Space Management Solution (Optional)

This chapter discusses:

- Understanding the Integration with eCenterOne Space Management
- Installing the Target Connector for eCenterOne
- Configuring the Local Gateway and Connector Properties
- Running Message Channel
- Activating the Domain for Asynchronous Messaging
- Activating Routings, Service Operations, and Updating Transaction Routings Properties
- Testing the eCenterOne Node
- Activating the Space Management Install Option
- Verifying the Integration

Understanding the Integration with eCenterOne Space Management

PeopleSoft 9.1 Asset Management integrates with CenterStone's eCenterOne Space Management solution to provide the following functionality:

- Maintain floor plans, import CAD drawings into CAFM.
- Design and maintain layout space in CAFM.
- Assign resources or employees to spaces.
- Manage occupancy and vacancy rate in CAFM.
- Analyze capacity and forecast capacity needs in CAFM.

This is an optional integration. If you are integrating PeopleSoft Asset Management with eCenterOne you need to purchase licensing directly from CenterStone, an additional component vendor, before proceeding further with this installation.

See "Configuring PeopleSoft 9.1 Asset Management with eCenterOne Space Management Solution."

Task 17-1: Installing the Target Connector for eCenterOne

You must download connector files to integrate with the eCenterOne software.

To download the connector files for integration:

1. Download the following connector files from http://www.centerstonesoft.com/integration.

   Note. eCenterOne software has been acquired by Manhattan Associates. The link in step 1 redirects you to the Manhattan Associates Site.

   If you encounter problems accessing the URL, locating or downloading the files, please contact CenterStone/Manhattan Associates support at (508) 435–1510, option 4. For all other issues contact Oracle Customer Support.

   - eCenterOneTargetConnector.class
   - insert-email.xslt
   - soap.jar
2. Copy the files eCenterOneTargetConnector.class and insert-email.xslt to the following directory:

   ```
   <PS_CFG_HOME>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\classes⇒
   \com⇒
   \peoplesoft\pt\integrationgateway\targetconnector
   ```
3. Copy the file soap.jar to the following directory:

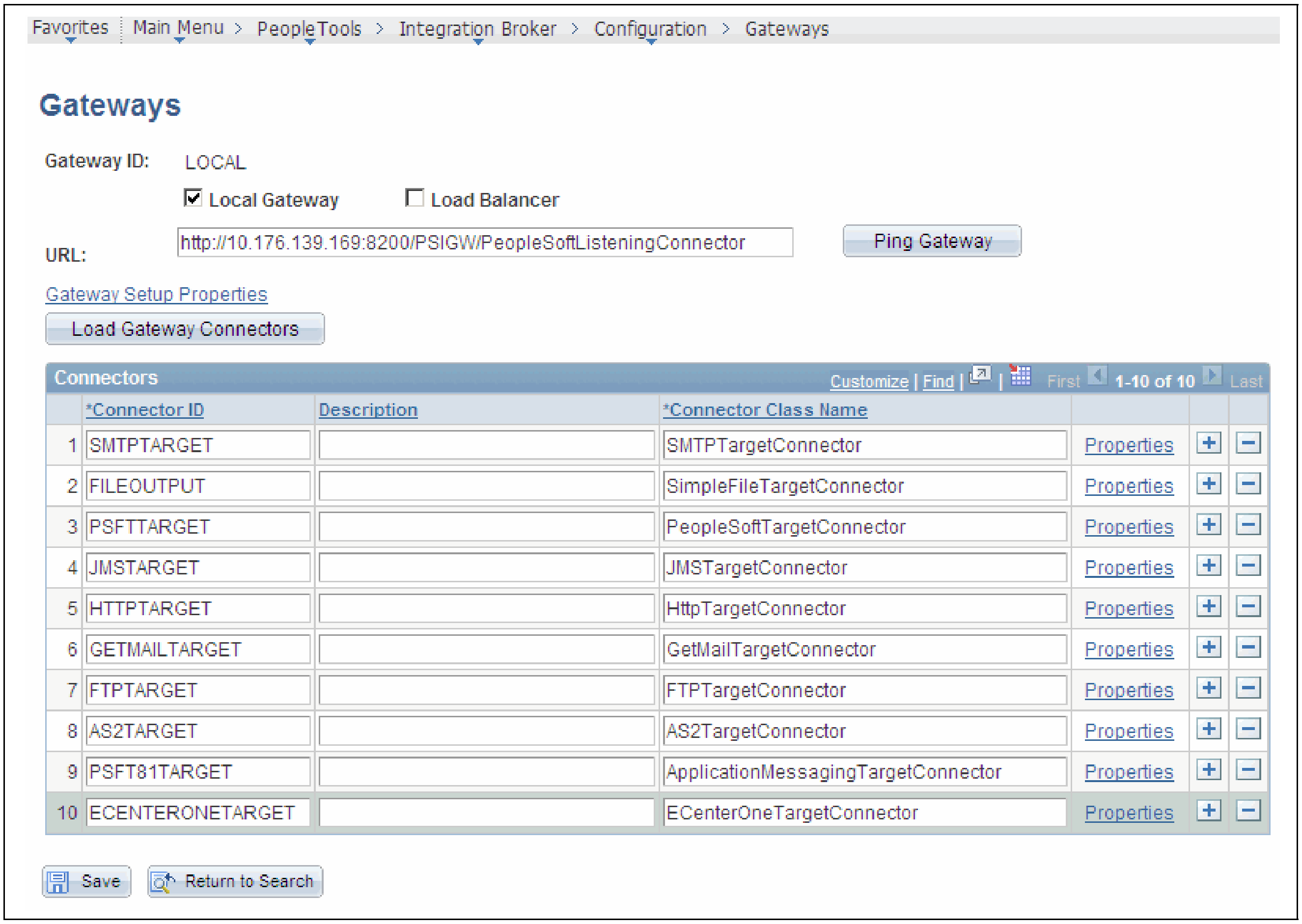
   ```
   <PS_CFG_HOME>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\lib
   ```
4. After copying the files, restart the web server.

Task 17-2: Configuring the Local Gateway and Connector Properties

To use the PeopleSoft Integration Broker to configure the local gateway for the eCenterOne integration:

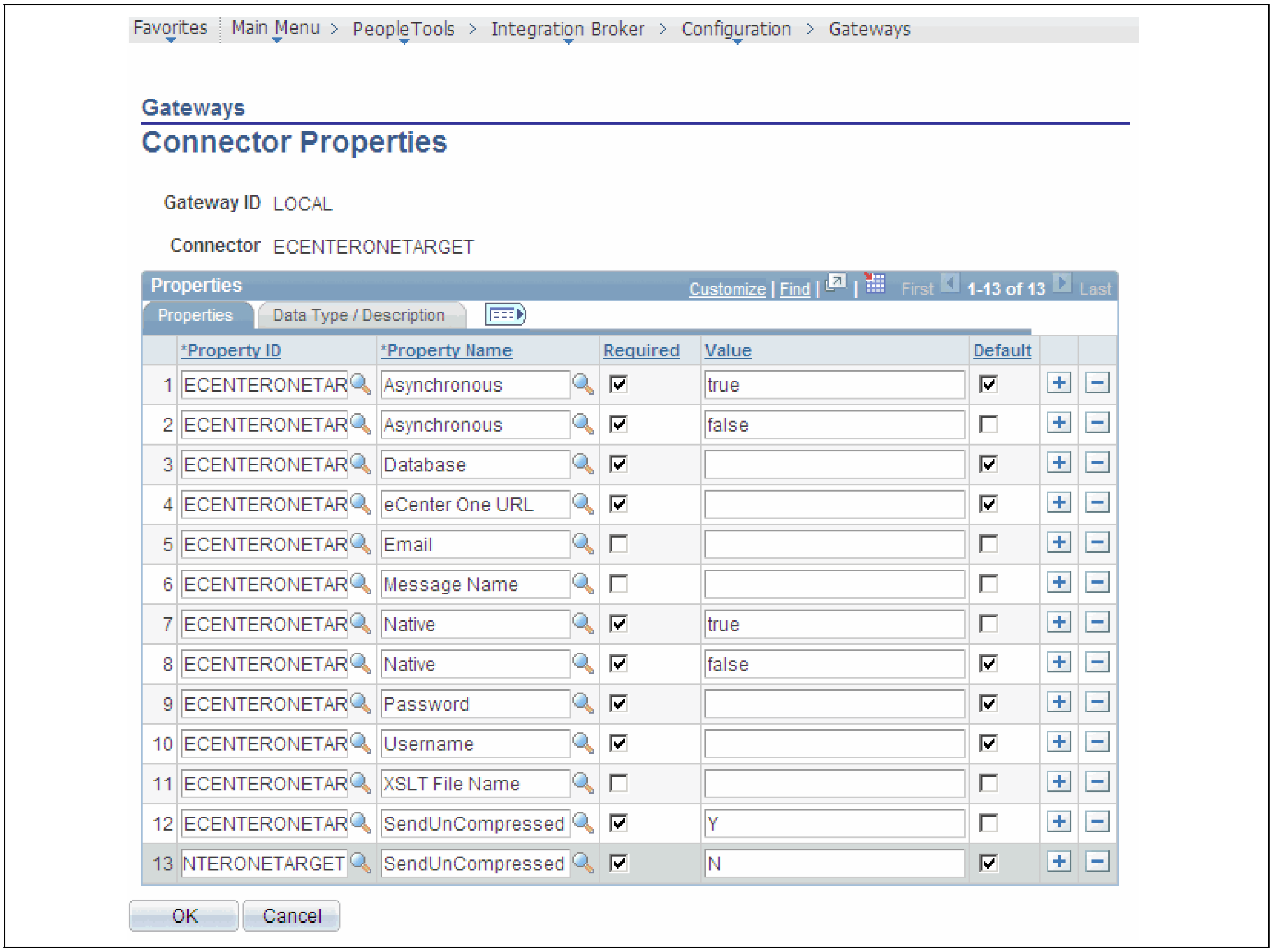
1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search. The system automatically displays the information for the local gateway.
3. On the Gateways page for the local gateway, in the URL field, enter *http://<WEBSRV>/PSIGW /PeopleSoftListeningConnector*.
4. Click Save.
5. Click the Load Gateway Connectors button.

   This ensures that all of the existing connectors install on the gateway.
6. Verify that one of the connectors is ECENTERONETARGET.
7. Click Save again. This installs the connectors, as shown in the following example:



Local Gateway page

8. In the Connectors group box, click the properties link.
9. Configure the eCenterOne Connector Properties to enable Messaging to the eCenterOne Server, as shown in the following example:



Connector Properties page

10. On the Local Gateway page, select the Properties link next to ECENTERONETARGET.
11. Select the Connector Properties and update the Value field for the Property Names listed in the following table:

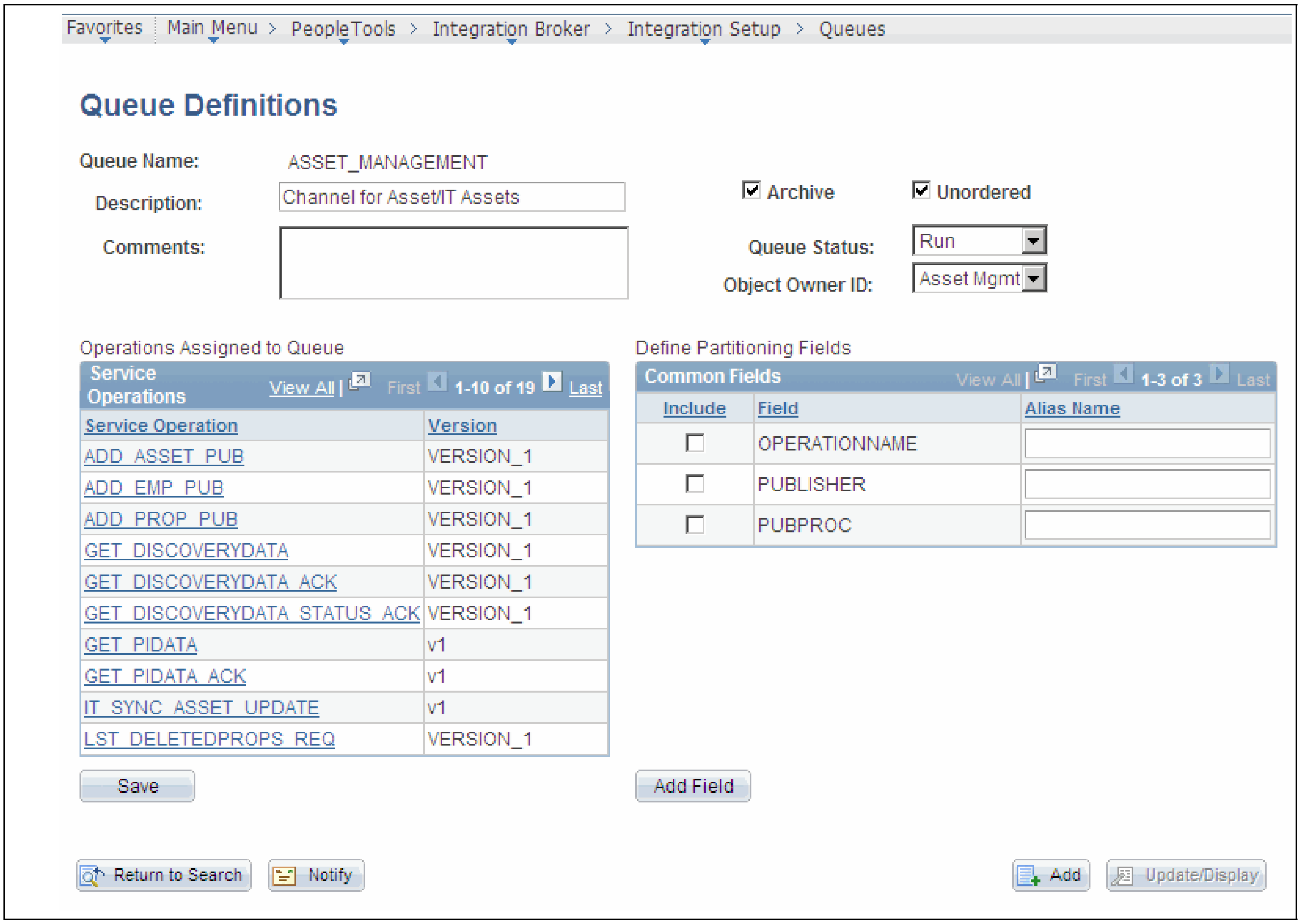
Property ID	Property Name	Description
ECENTERONETARGET	Database	Target eCenterOne Database Name
ECENTERONETARGET	Email	Email Address for Notifications from CenterStone
ECENTERONETARGET	eCenterOne URL	eCenterOne Server URL
ECENTERONETARGET	Password	eCenterOne Server Password
ECENTERONETARGET	User Name	eCenterOne Server Username

12. Click Save.

Task 17-3: Running Message Channel

To run message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Monitor Message Queues.
2. On the Queue search page, search for and select the message channel *ASSET_MANAGEMENT*.
3. On the Queue Definitions page, in the Queue Status field, verify that Run is selected from the drop-down list box, as shown in the following example:



Queue Definitions page

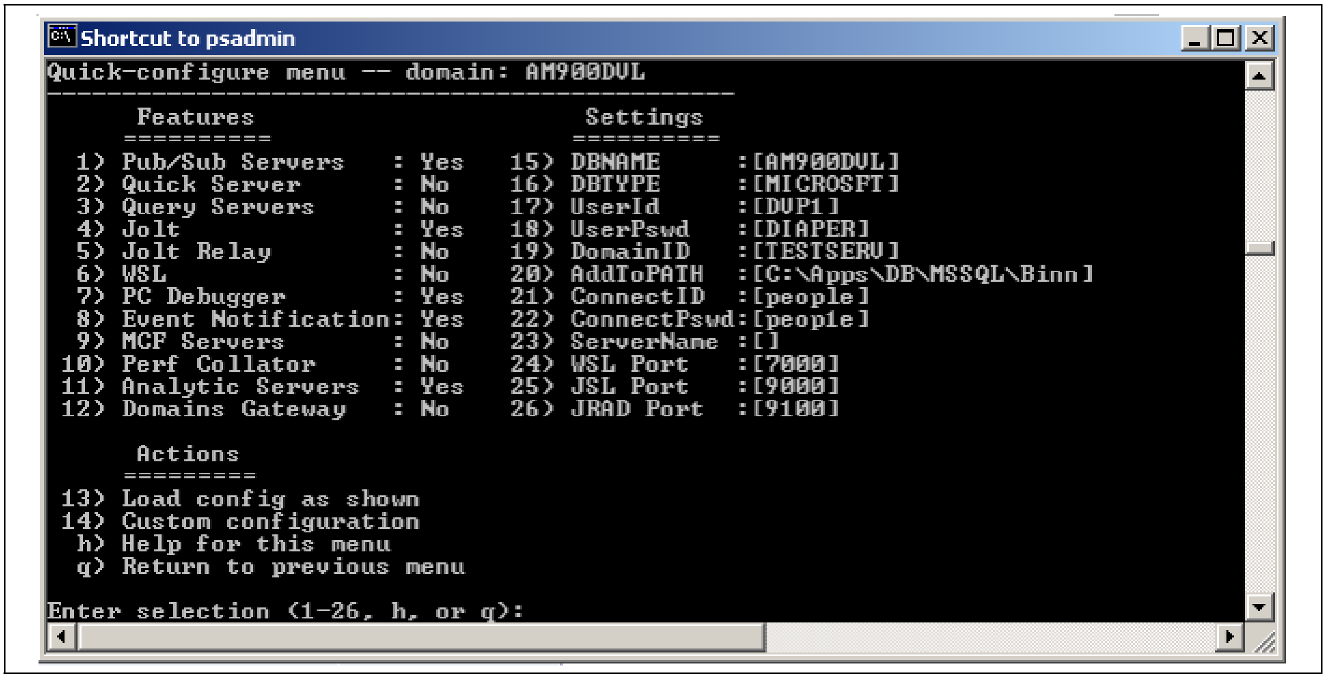
4. If the status is *Paused*, click the Run button.

Task 17-4: Activating the Domain for Asynchronous Messaging

Asynchronous message handling in the PeopleSoft system is different from synchronous message handling. In the asynchronous mode, a message is dumped in a queue and a message handler then picks up the message and gives it to the message dispatcher. The dispatcher then delivers the message to the target node.

To enable the message handler and dispatcher, verify that your domain has publish/subscribe servers configured in psadmin.

Launch psadmin.exe from <PS_HOME>/appserv, and verify that the option Pub/Sub servers is set to Yes, as shown in the following example:



Setting the pub/sub servers option in psadmin

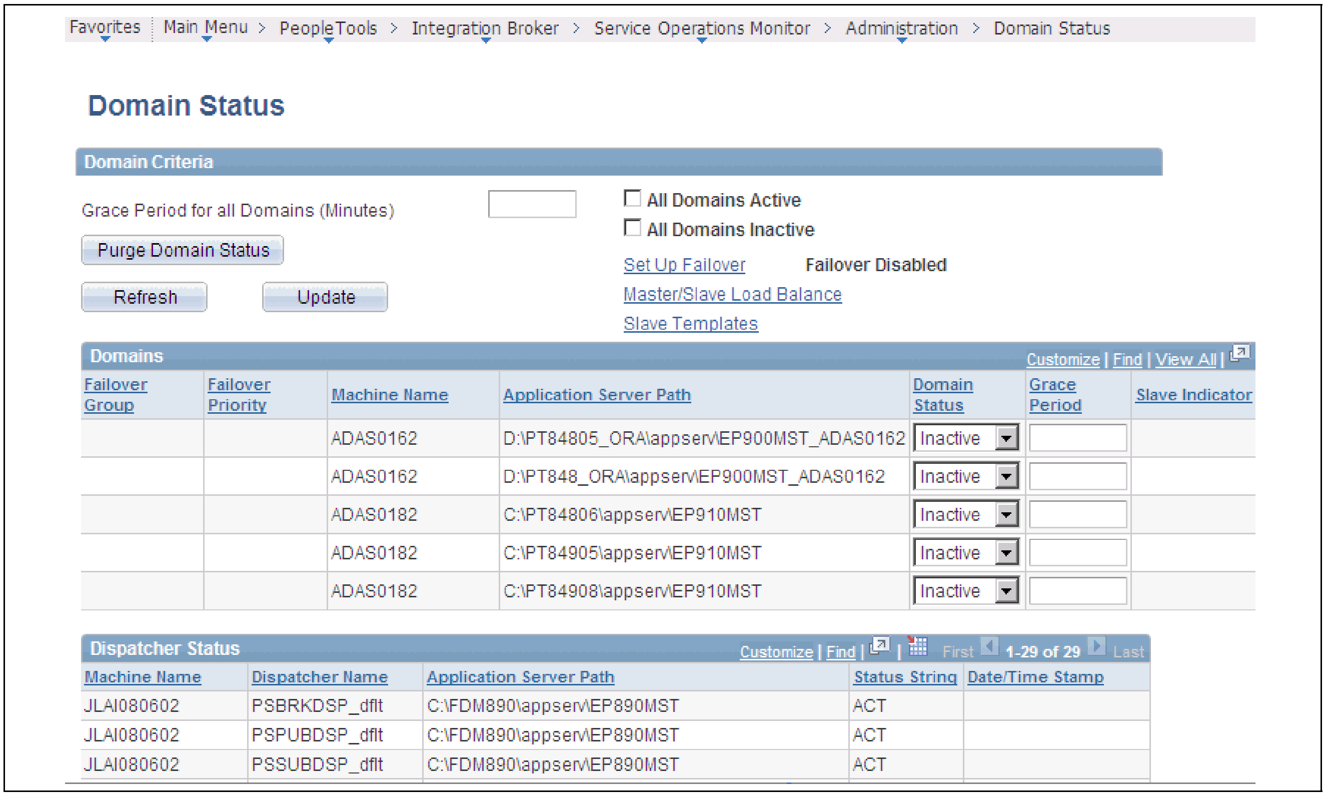
Note. Psadmin configuration is used to support asynchronous messaging. After you start your application server, you see two new processes—one for Message Handler, and one for message dispatcher.

After you configure your application server, you need to activate your domain through PeopleSoft Pure Internet Architecture to ensure Handler and Dispatcher pick up your asynchronous messages.

To activate your domain through PeopleSoft Pure Internet Architecture:

1. Select the Connector Properties and update the Value field for the Property Names that follow.
2. Select PeopleTools, Integration Broker, Service Operations Monitor, Monitor Message, Administration, Domain Status.
3. Select the Domain Status tab to access the Domain Status page.
4. Search for your domain, and then in the Domain Status field select *Active* from the drop-down list box.

   In the following example, notice that the domain is distinguished through the machine name:



FO_WC_CO_STATE_SYNC

Task 17-5: Activating Routings, Service Operations, and Updating Transaction Routings Properties

For Oracle customers only: Run the following statement against the PeopleSoft FSCM 9.1 Feature Pack 2 database using SQL*PLUS *before* you run the scripts in this section:

```
ALTER SESSION set NLS_Date_Format = 'YYYY-MM-DD'
```

1. Using a database query tool (such as iSQL, SQL*Plus, and DB2 Command Window) sign in to the target PeopleSoft FSCM database.
2. Edit the AM_CAFM_IB_UPDATE.SQL script from the Scripts directory, under the folder where PeopleSoft Asset Management FSCM was installed.

   Edit the entries in the AM_CAFM_IB_UPDATE.SQL file and update the following values between delimiters << and >> in single quotes. Cornerstone/Manhattan Associates should provide these values when you purchase the eCenterOne software.

   ```
   <<URL>>
   <<DATABASE>>
   <<USERNAME>>
   <<PASSWORD>>
   ```

   For example:

   ```
   Update PSRTNGDFNCONPRP set PROPVALUE = 'http://centerstone3.ecenterone.com'⇒
    where PROPNAME = 'eCenter One URL' and ROUTINGDEFNNAME IN (select⇒
   ```

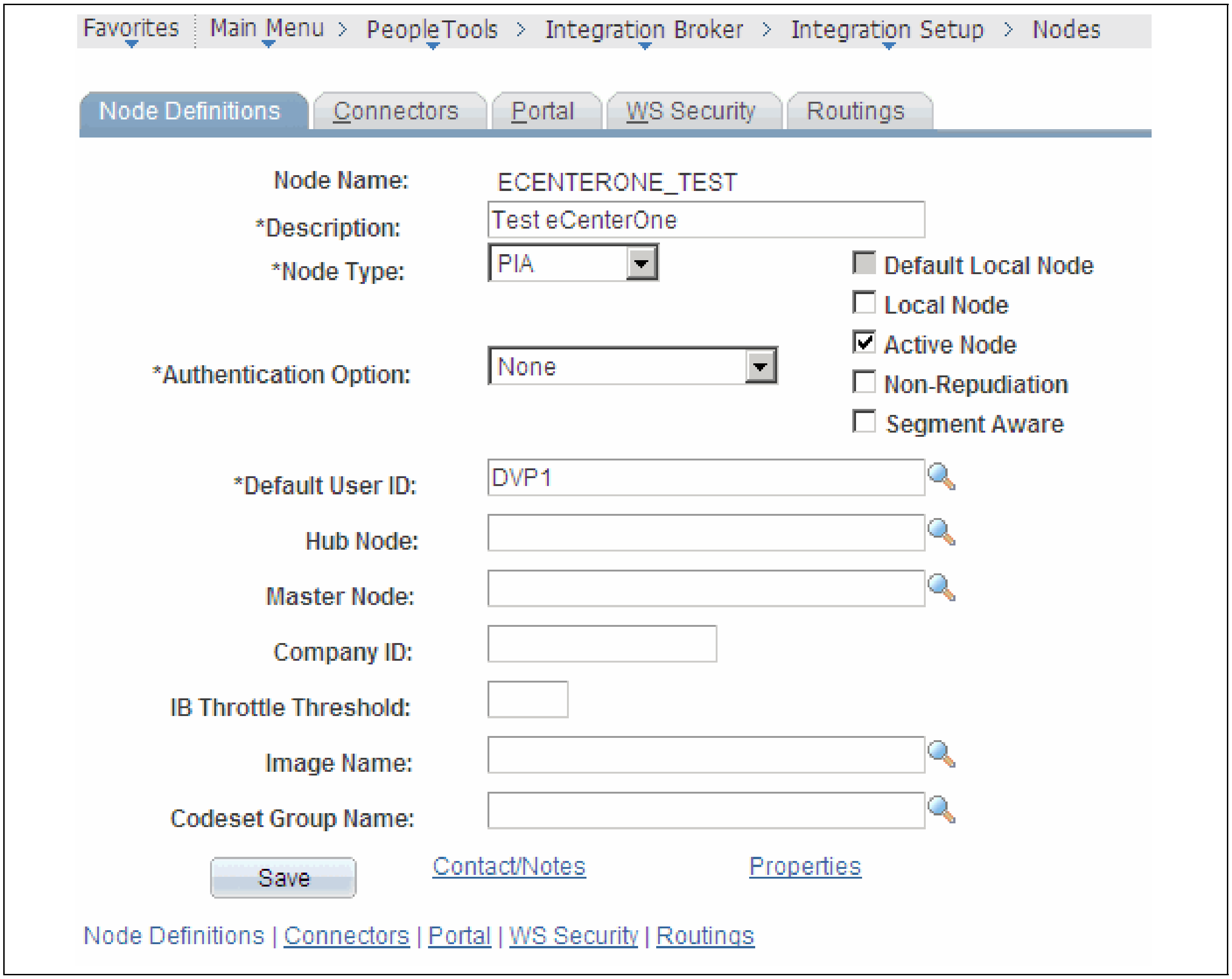
```
 ROUTINGDEFNNAME from PSIBRTNGDEFN where RECEIVERNODENAME = 'PSFT_XOUTBND' and⇒
 IB_OPERATIONNAME IN ('ADD_EMP_PUB','ADD_PROP_PUB','SYN_DEPT_HIER_PUB','SYN_EMP_⇒
⇒
⇒
⇒
PUB','UPD_EMP_PUB','UPD_PROPID_PUB','LST_DELETEDPROPS_REQ','LST_NEWPROPS_⇒
REQ','UPD_EMPLOC_REQ','UPD_PROP_REQ'));
```

3. Run the script.

Task 17-6: Testing the eCenterOne Node

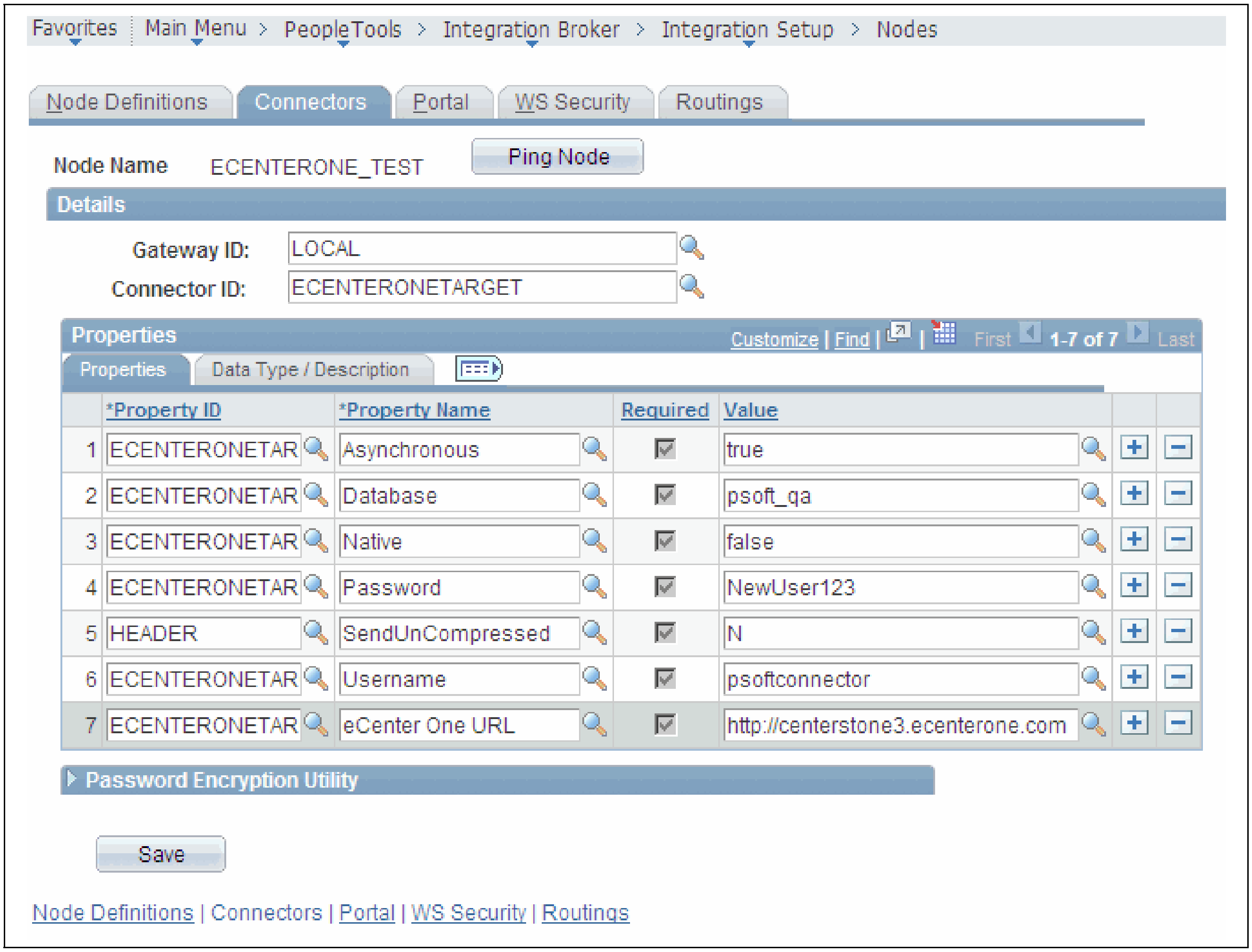
Create an eCenterOne test node and ping to verify the connection properties are correct.

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, select the Add a New Value tab to add a new test node, such as *ECENTERONE_TEST*.
3. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:



Node Definitions page

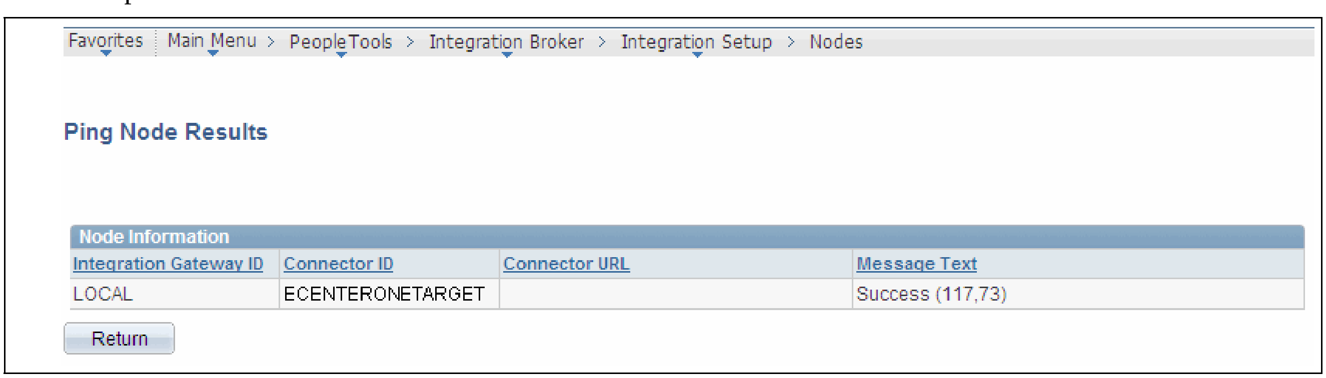
4. On the Node Definitions page, enter values in the following fields (the following are example values):
   - In the Description field, enter *Test eCenterOne*.
   - In the User ID field, enter *DVP1*.
5. Select the Connectors tab to access the Connectors page, as shown in the following example:



Node Connectors page

6. On the Connectors page, in the Connector ID field, click the look up button and select *ECENTERONETARGET*.
7. Click Save.
8. Click the Ping Node button to verify the ping is successful.

   If the ping is successful, the value of Success displays in the Message Text field, as shown in the following example:



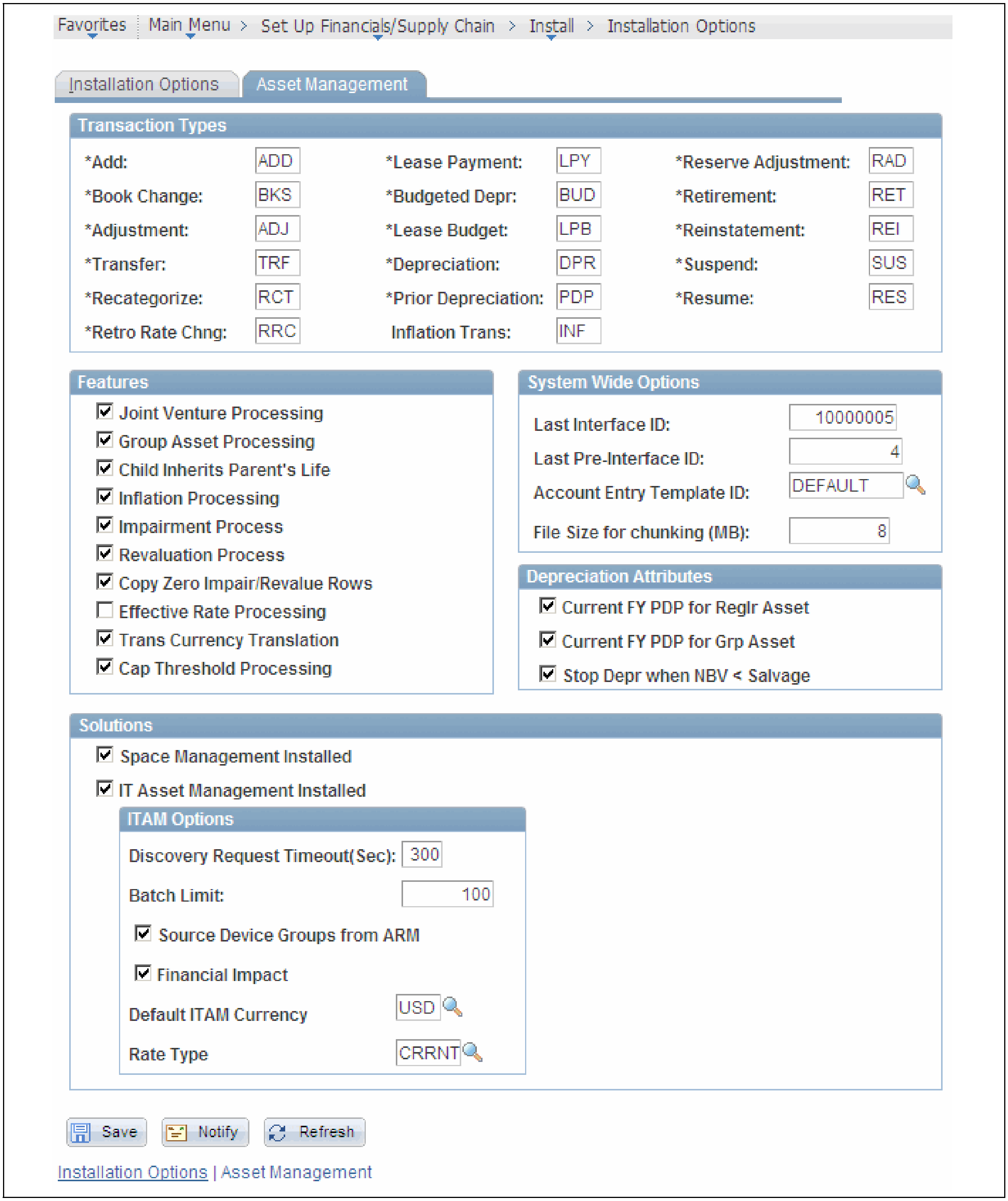
Ping Node Results page

9. Shut down the application server and web server and restart them.

Task 17-7: Activating the Space Management Install Option

To activate this option:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. On the Installation Options page, select the Asset Management tab to access the Asset Management page.
3. On the Asset Management page, in the Solutions group box, select the Space Management Installed check box, as shown in the following example:



Installation Options - Asset Management page

4. Click Save.

Task 17-8: Verifying the Integration

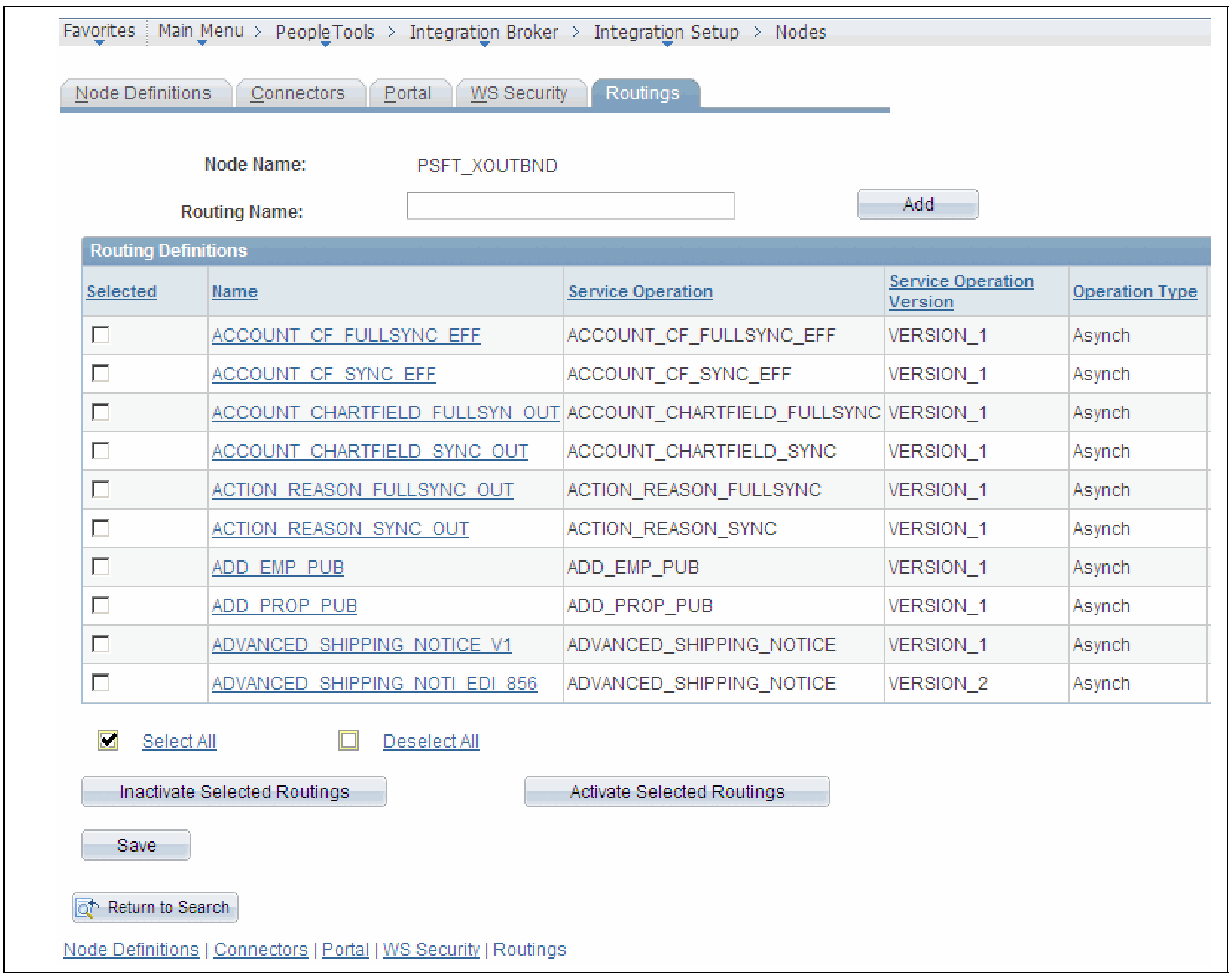
This section discusses:

- Verifying Node Definitions
- Verifying Service Operations

Task 17-8-1: Verifying Node Definitions

To verify node definitions:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_XOUTBND*.
3. On the Node Definitions page, select the Routings tab to access the Routings page, as shown in the following example:



Node Routings tab

4. On the Routings page, verify that there are routings defined for the PSFT_XOUTBND node for the following messages:

```
ADD_EMP_PUB
ADD_PROP_PUB
SYNC_DEPT_HIER_PUB
SYN_EMP_PUB
UPD_EMP_PUB
UPD_PROPID_PUB
LST_DELETEDPROPS_REQ
LST_NEWPROPS_REQ
UPD_EMPLOC_REQ
UPD_PROP_REQ
```

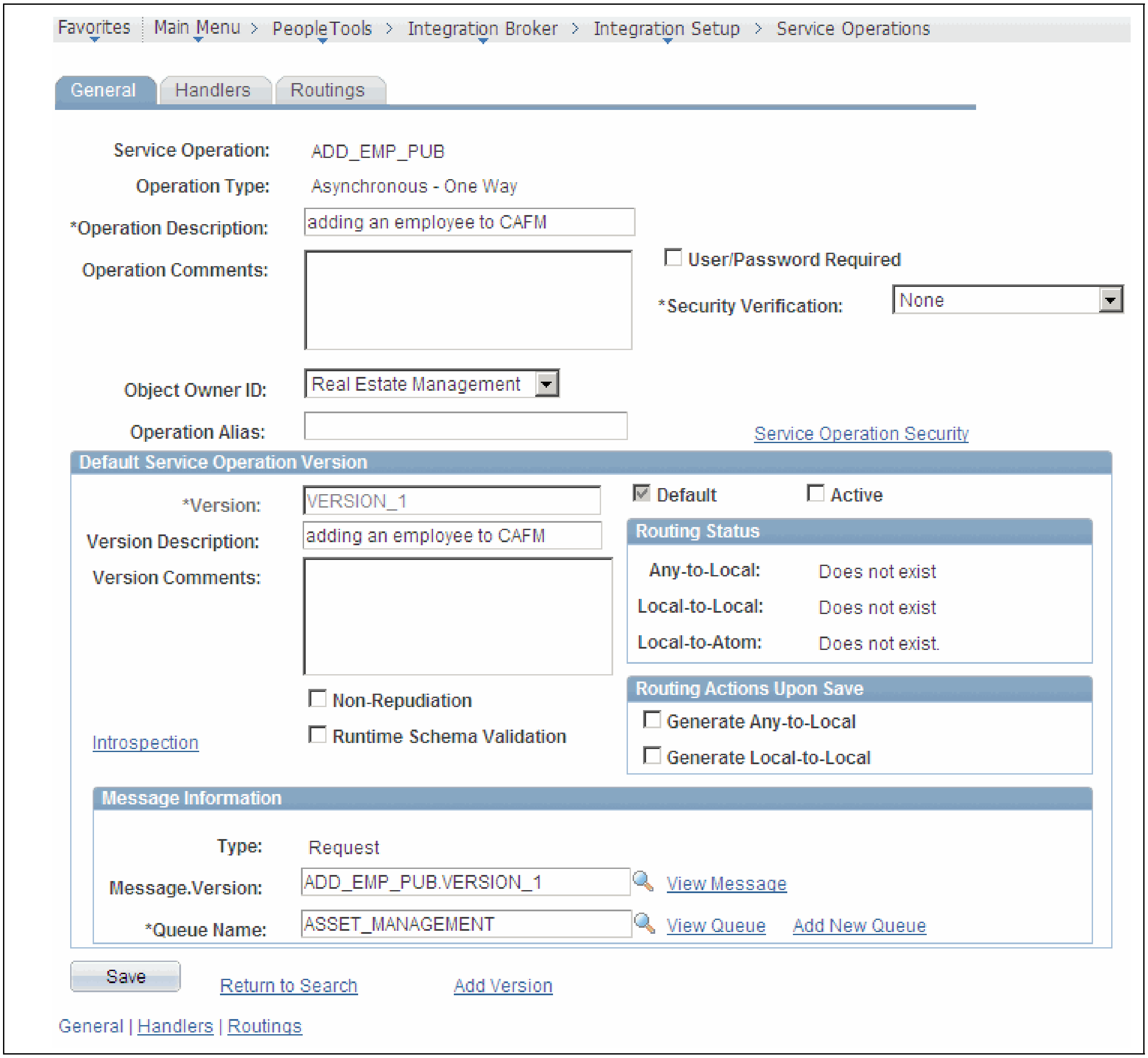
5. For each Routing, click the Detail link to verify that the details are correct.

Task 17-8-2: Verifying Service Operations

To verify service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operation search page, search for and select the service operation *ADD_EMP_PUB*.
3. On the Service Operation - General page, verify that the details are correct.

   Verify that the details are correct for all of the other service operations, as shown in the following example:



Service Operations - General page

4. Repeat steps 2–3 to verify for all of the other service operations.

For additional information about this integration, refer to the following:

See *PeopleSoft Real Estate Management 9.1 PeopleBook,* "Integrating with Other Applications."

See *PeopleSoft Asset Lifecycle Management Fundamentals 9.1 PeopleBook,* "Integrating PeopleSoft Asset Management with Other Products."

CHAPTER 18

Integrating PeopleSoft 9.1 Asset Management with Physical Inventory Solutions

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.1 Asset Management with Physical Inventory Using Web Services.
- Configuring the Local Gateway
- Configuring the Inbound Nodes
- Activating Service Operations
- Running Message Channel
- Activating the Domain for Asynchronous Messaging

Understanding the Integration of PeopleSoft 9.1 Asset Management with Physical Inventory Using Web Services.

PeopleSoft 9.1 Asset Management integrates with additional component (third-party) Physical Inventory Solutions to provide the following functionality:

- Publish lists of assets in the asset repository that need to undergo the physical inventory process.
- Upload results of the physical inventory into the asset repository.

Note. In prior PeopleSoft releases, this feature is only available using flat files. The tasks in this chapter are optional if the Physical Inventory feature is not implemented, or if the Physical Inventory feature is implemented using flat files.

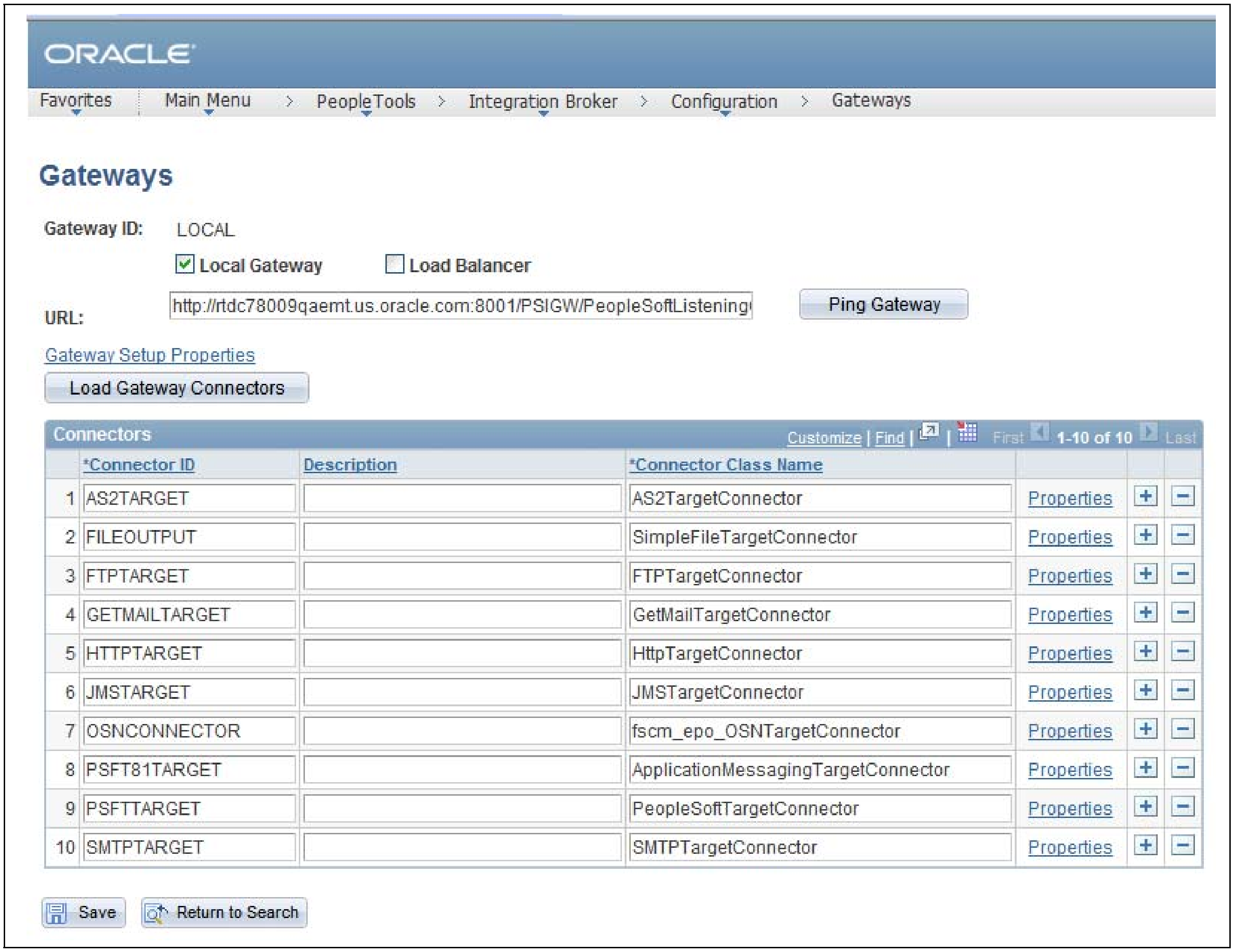
Task 18-1: Configuring the Local Gateway

To configure the local gateway:

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

   The Gateways search page appears.
2. Click Search.

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



Gateways page

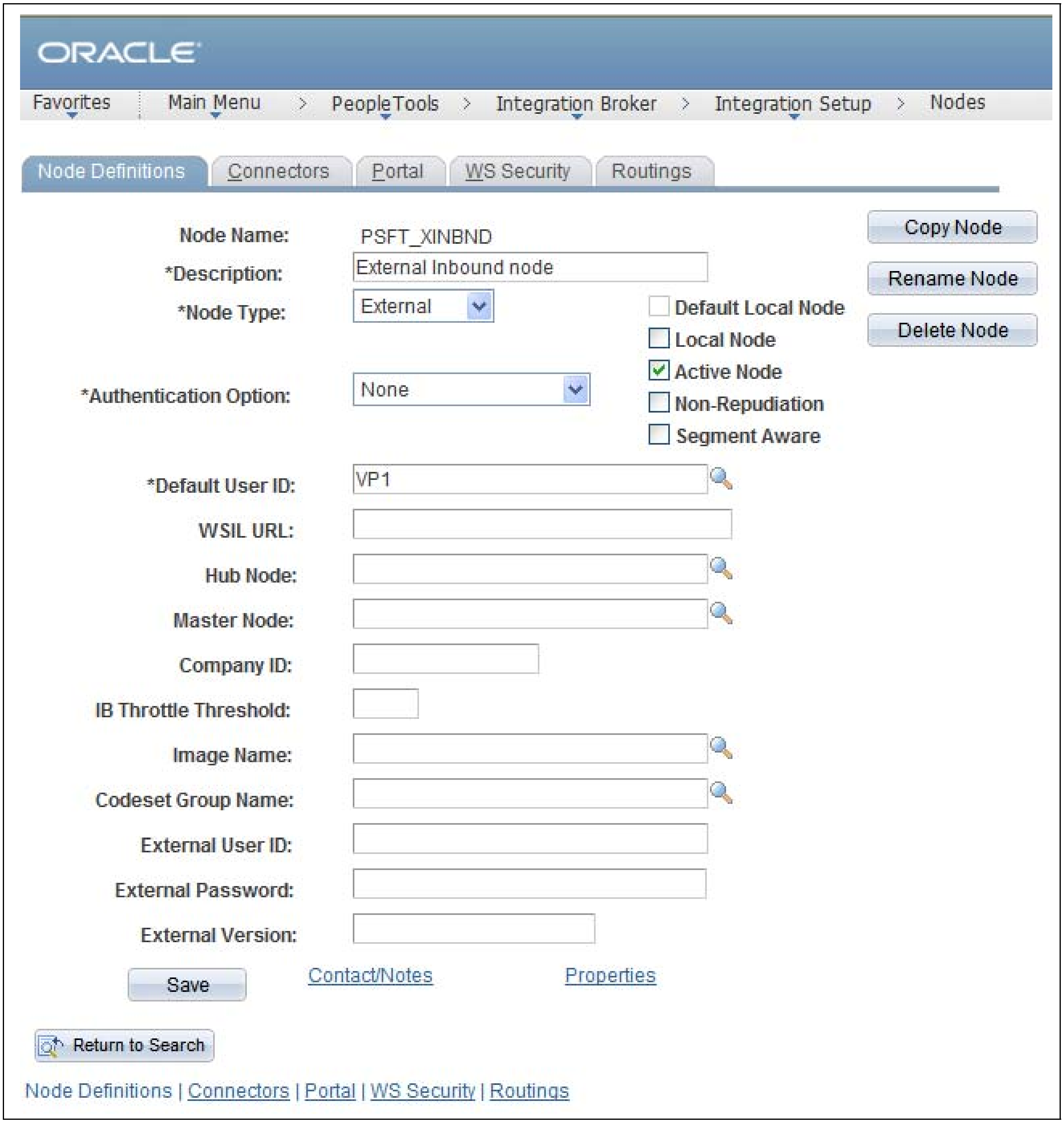
3. In the URL field, enter the URL *http://<WEBSRV:PORT>/PSIGW/PeopleSoftListeningConnector*.
4. Click Save.
5. Click the Load Gateway Connectors button. This ensures that all of the existing connectors install on the gateway.
6. Click Save.

   The Connectors are installed.

Task 18-2: Configuring the Inbound Nodes

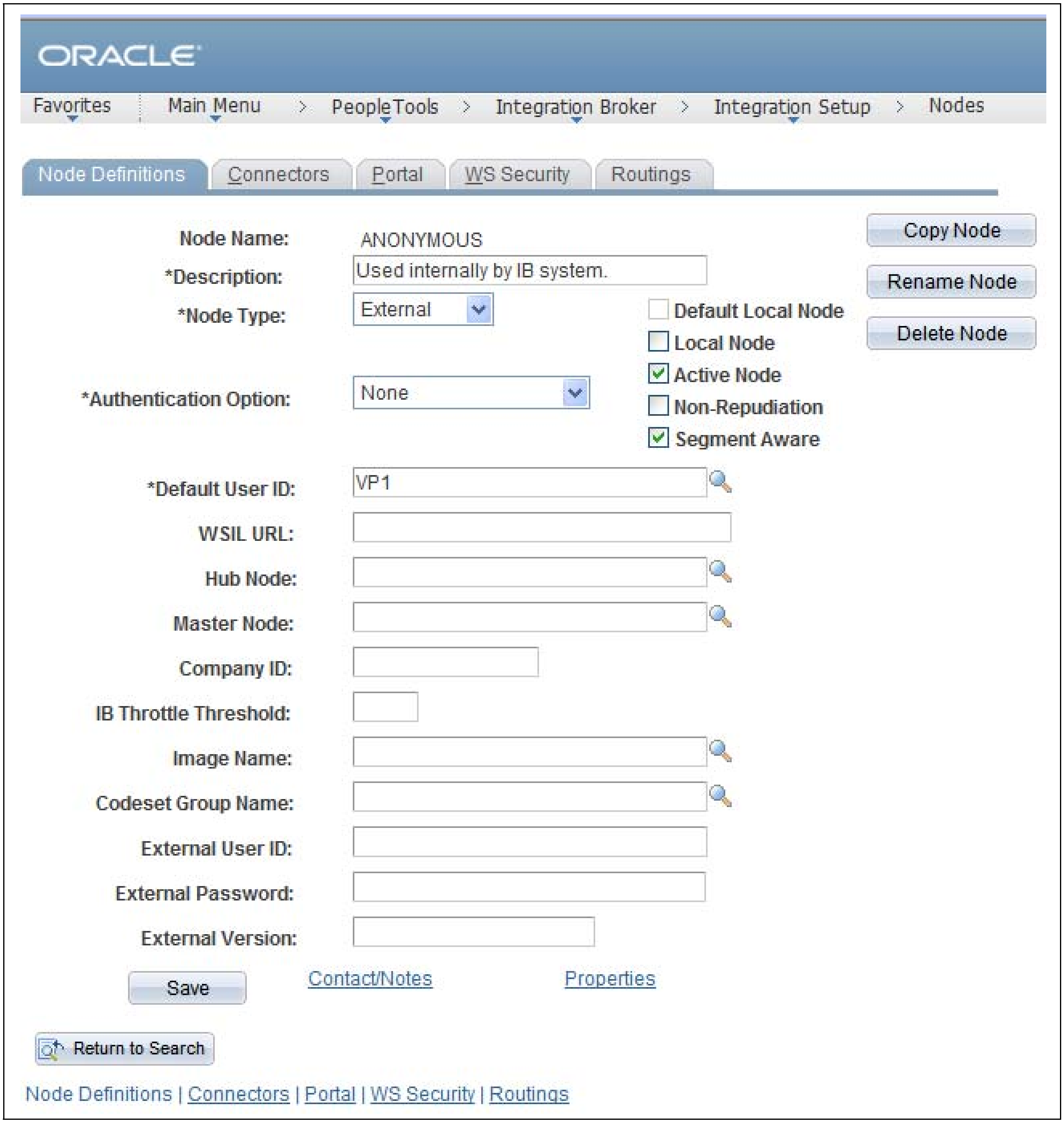
To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Node search page, search for and select the node name *PSFT_XINBND*, as shown in the following example:



Node Definitions - PSFT_XINBND page

3. On the Node Definitions page, in the Default User ID field, enter the value for the user that makes the requests from ITAM for the PSFT_XINBND nodes.
4. Click Save.
5. Click Return to Search.
6. On the Nodes search page, search for and select the node name *ANONYMOUS*.
7. On the Node Definitions page, in the Default User ID field, enter the value for the user that makes the requests from ITAM for the ANONYMOUS node, as shown in the following example:



Node Definitions - Anonymous page

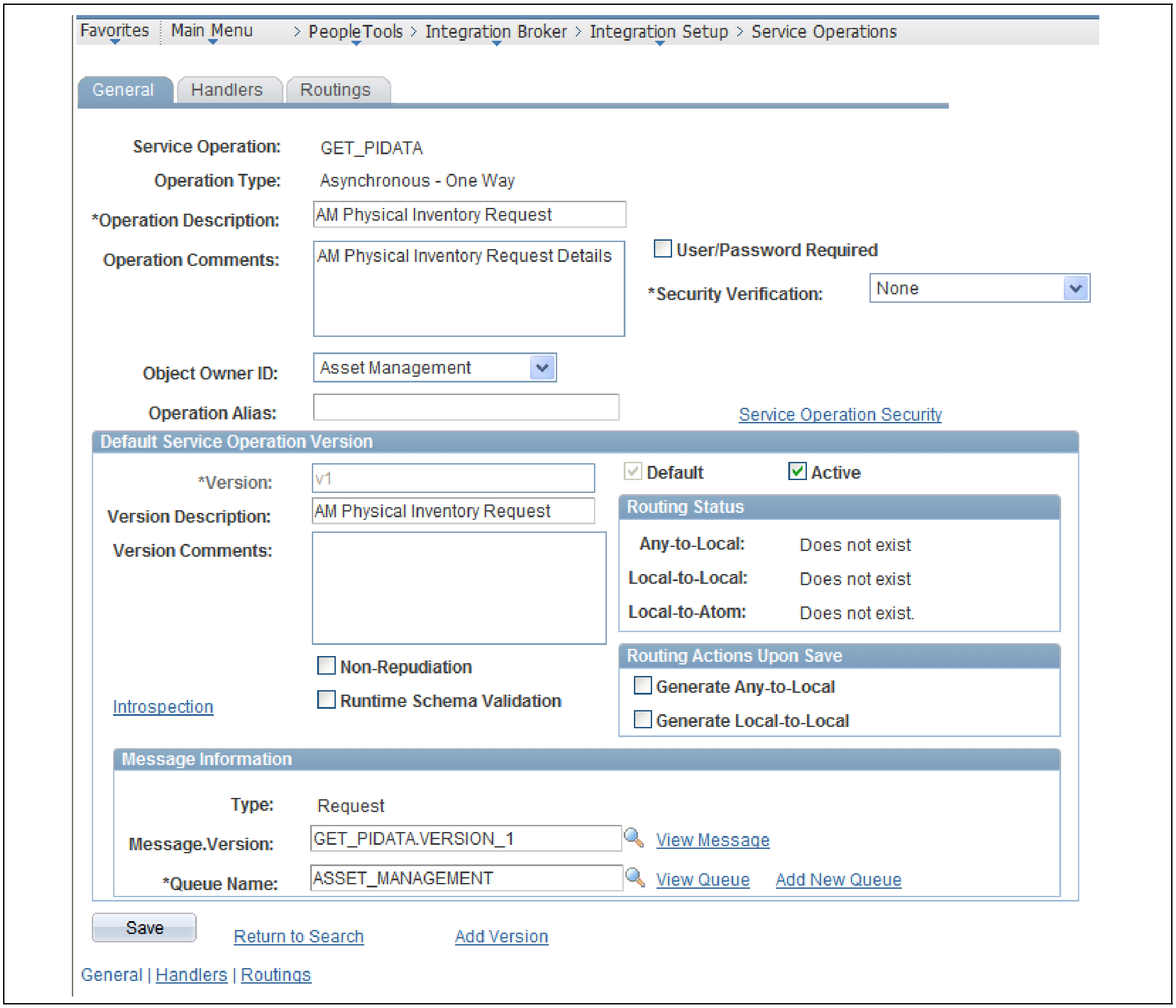
8. Click Save.

Task 18-3: Activating Service Operations

To activate service operations:

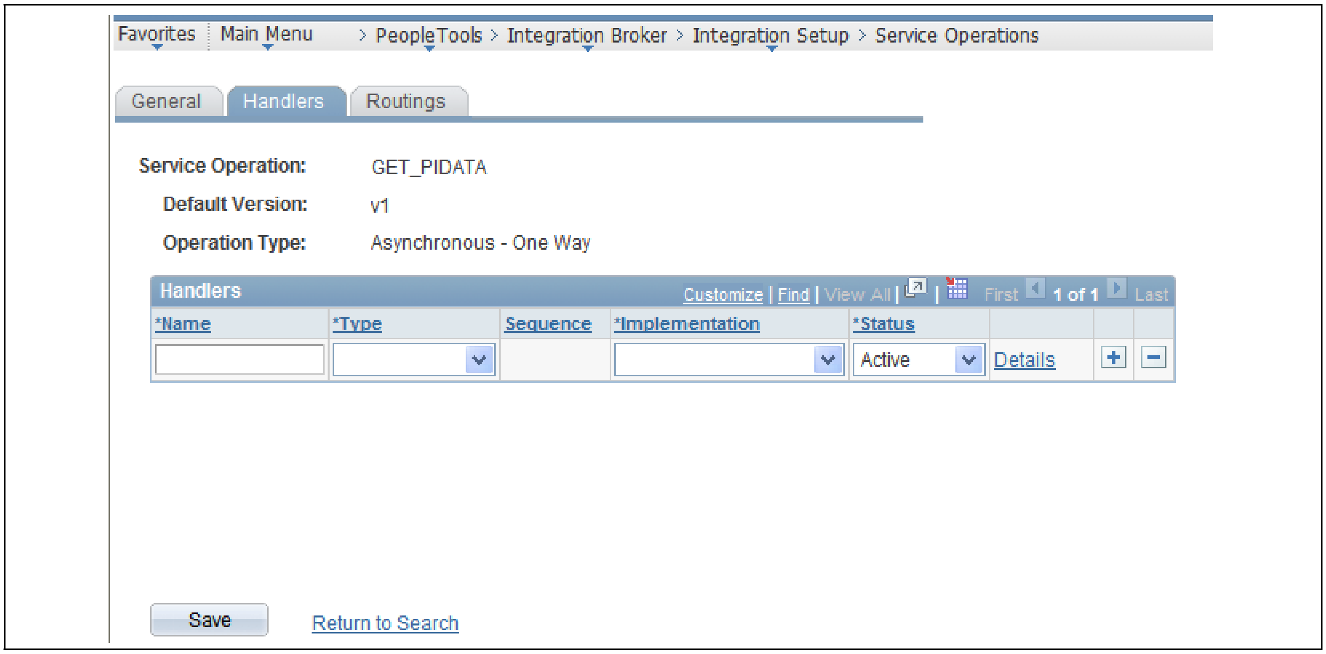
1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operations search page, search for and select the service operation *GET_PIDATA*.

   The Service Operations - General page appears, as shown in the following example:



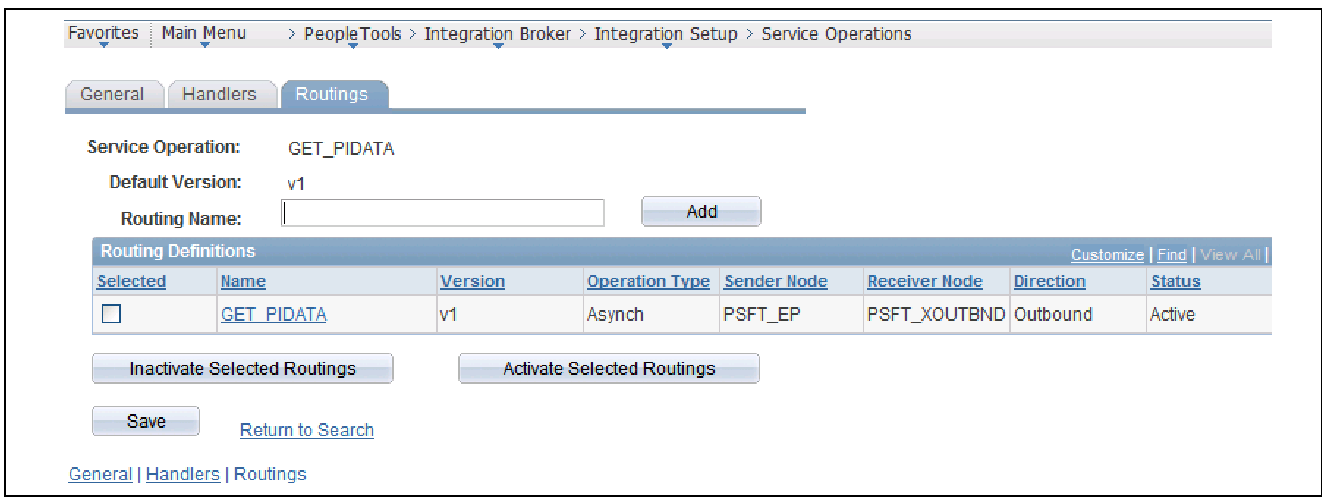
Service Operations - General page

3. On the General page, select the Active check box, and then click Save.
4. On the Save Message dialog box, click OK.
5. Select the Handlers tab to access the Handlers page, as shown in the following example:



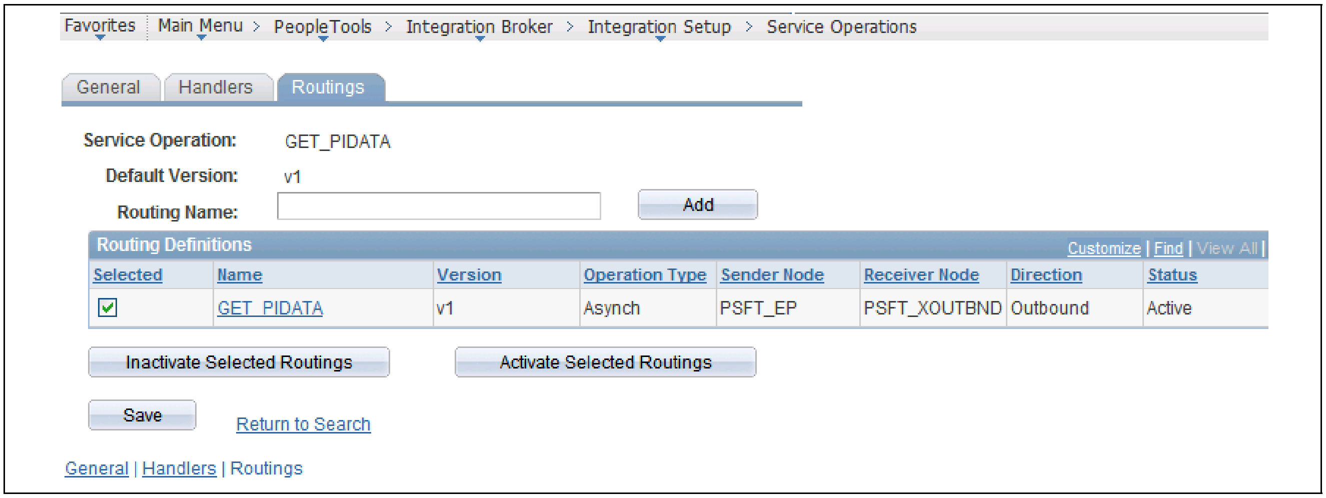
Service Operations - Handlers page

6. On the Handlers page, in the Status field, select Active from the drop-down list box.
7. Click Save.
8. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operations - Routings page

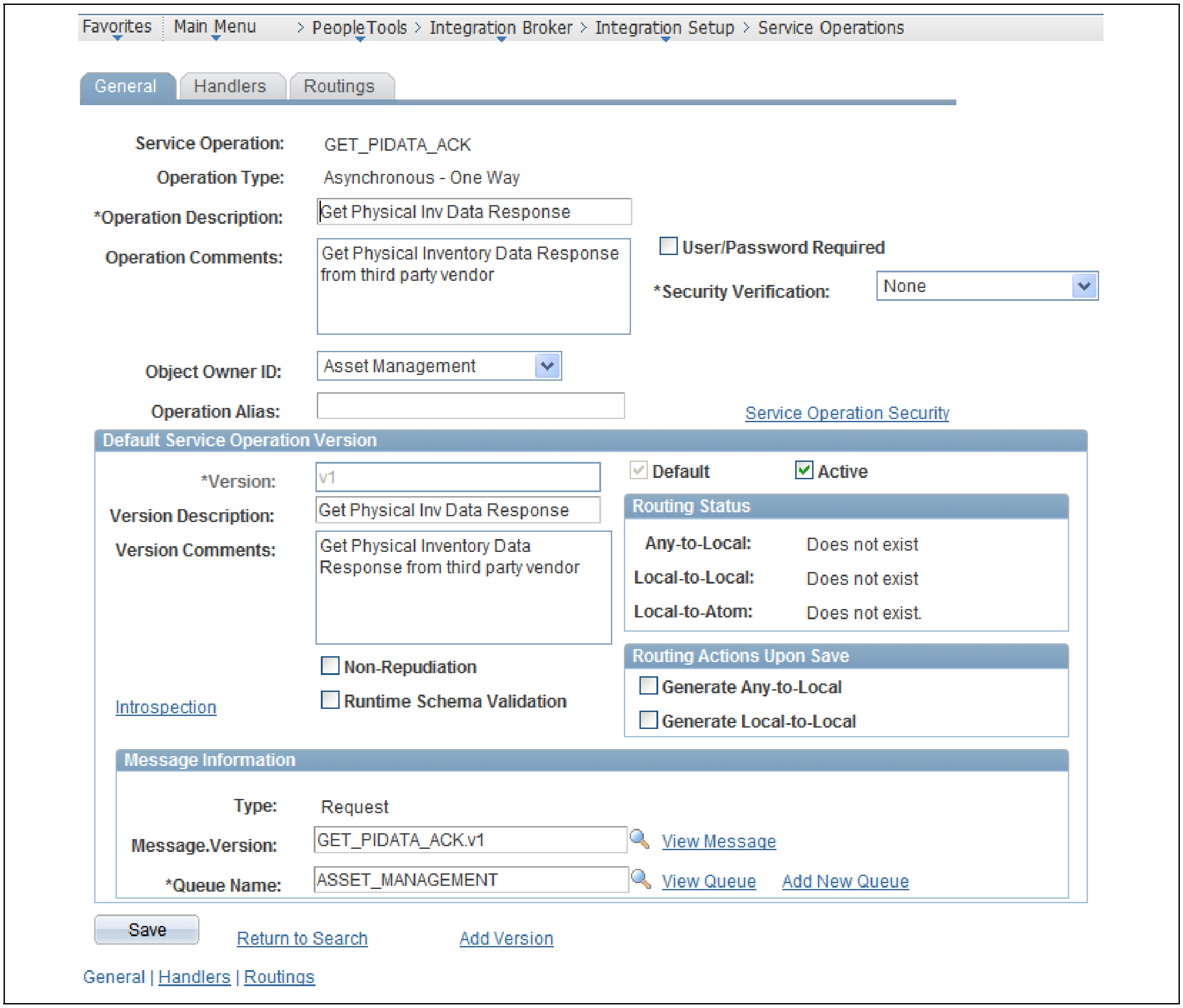
9. Select the check box for the routing GET_PIDATA, as shown in the following example:



Service Operations - Routings: Selected page

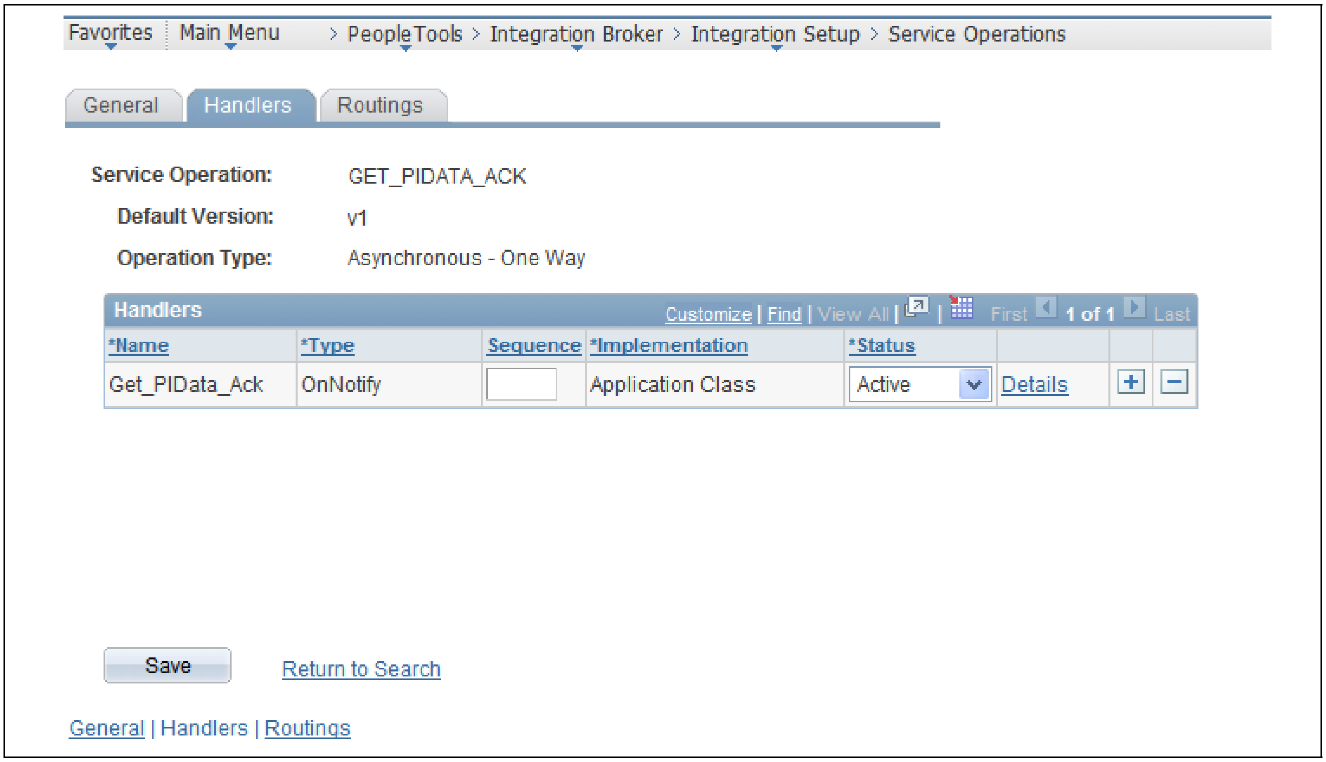
10. Click the Activate Selected Routings button.
11. Select the General tab to access the General page.
12. Click Return to Search.
13. On the Service Operations search page, search for and select the service operation *GET_PIDATA_ACK*.

    The Service Operations - General page appears, as shown in the following example:



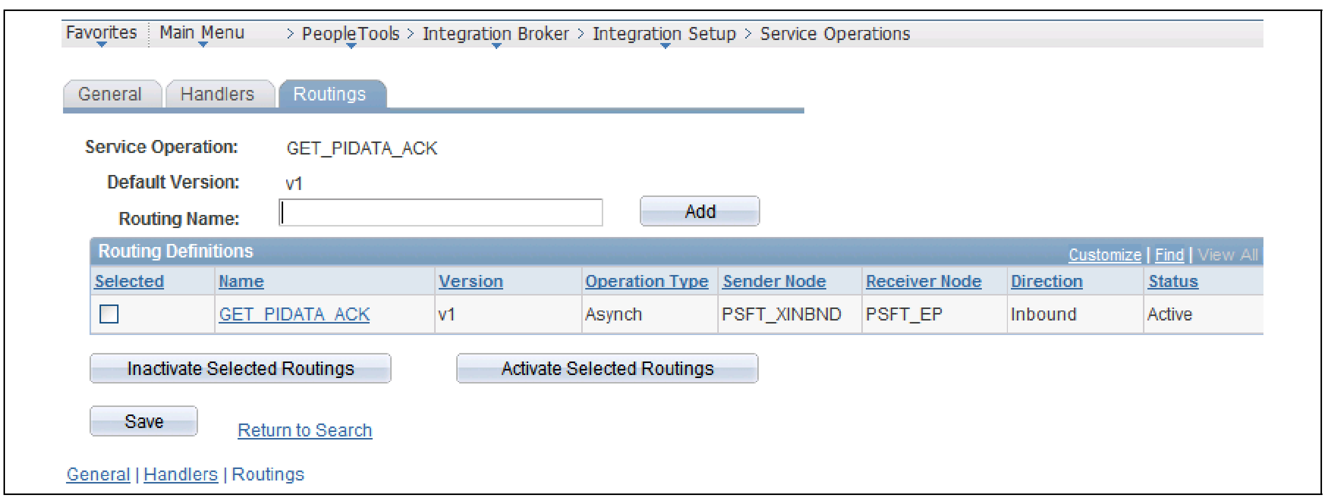
Service Operations - General page

14. On the General page, select the Active check box, and then click Save.
15. On the Save Message dialog box, click OK.
16. Select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations - Handlers page

17. On the Handlers page, in the Status field, select Active from the drop-down list box.
18. Click Save.
19. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operations - Routings page

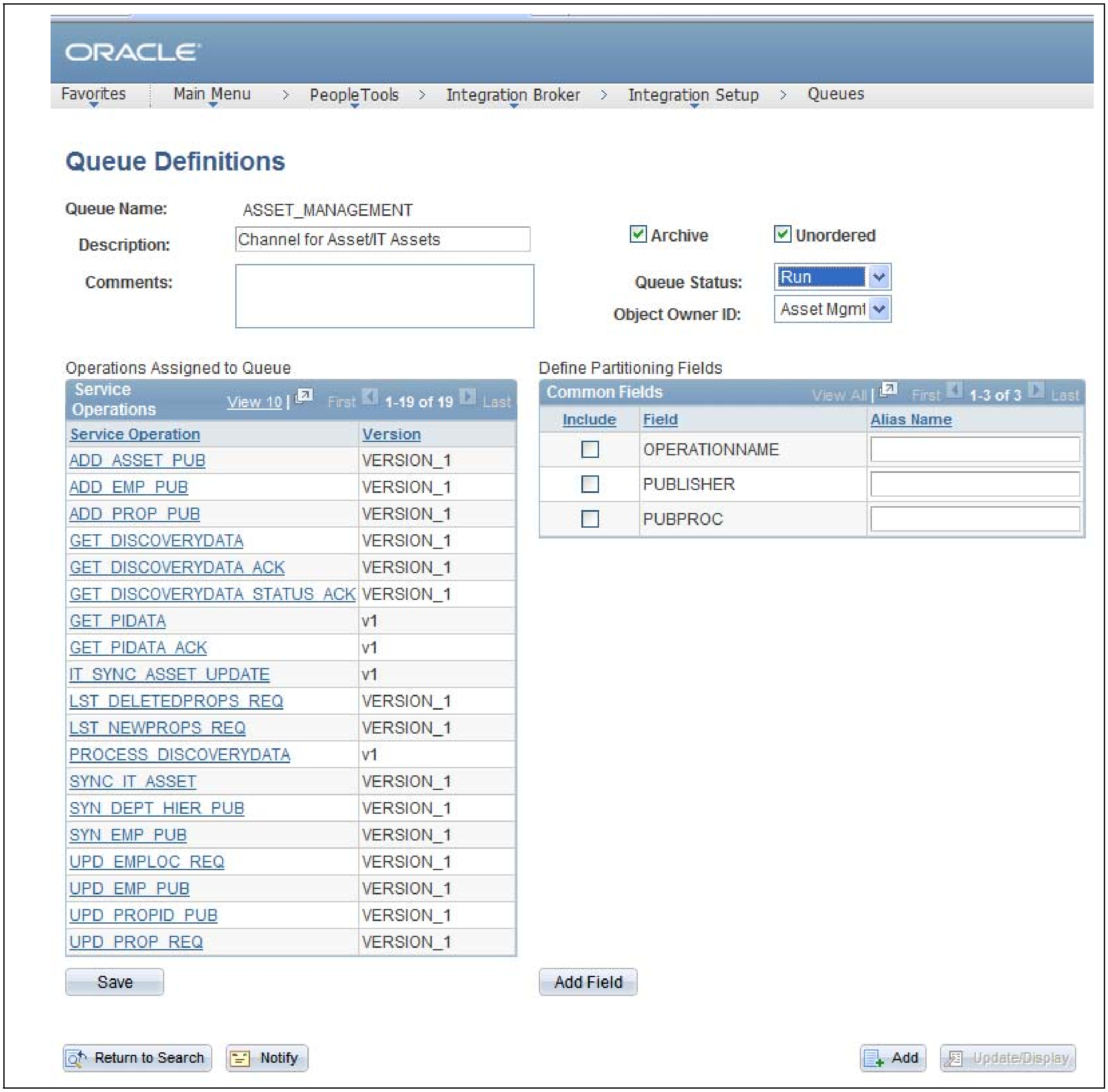
20. On the Routings page, select the check box for the routing GET_PIDATA_ACK.
21. Click theActivate Selected Routings button.
22. Click Save.

Task 18-4: Running Message Channel

To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name ASSET_MANAGEMENT.

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions

3. On the Queue Definitions page, verify that the Queue Status is set to *Run*.
4. If the Queue Status is Paused, select *Run* from the Queue Status drop-down list box.

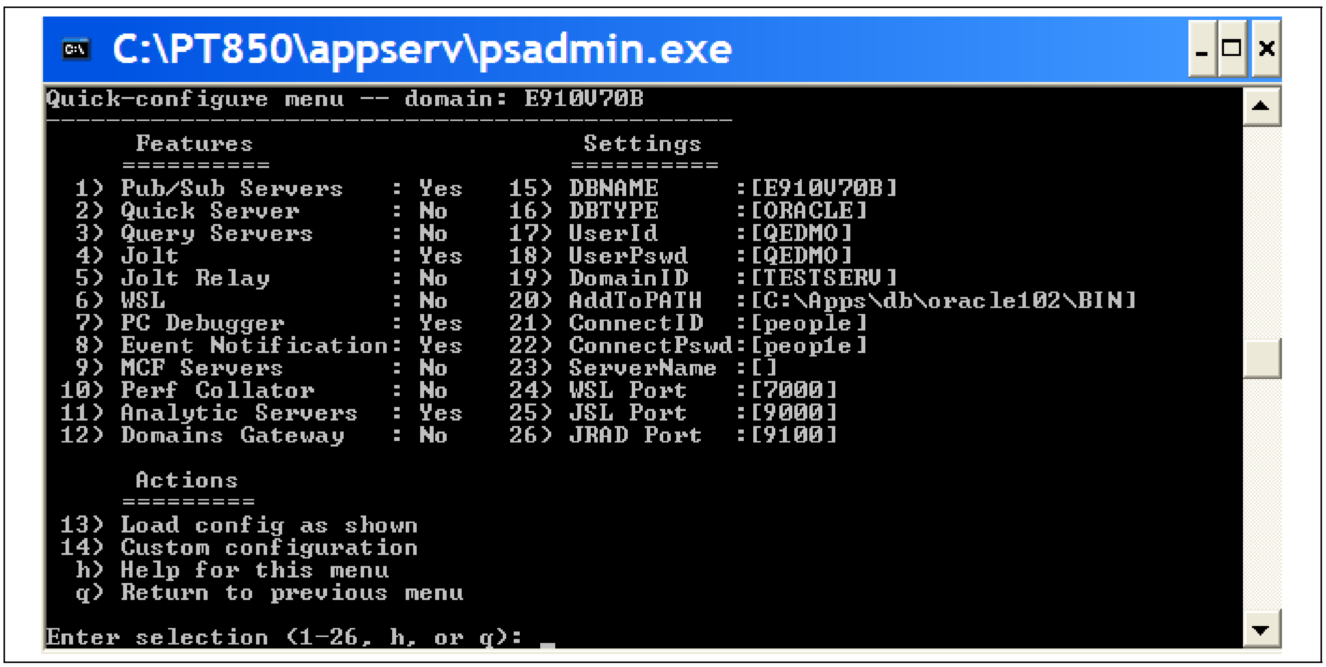
5. Click Save.
6. When the Queue Saved Message dialog box appears, click OK.

Task 18-5: Activating the Domain for Asynchronous Messaging

Asynchronous message handling in PeopleSoft is different from synchronous message handling. In the asynchronous mode, a message is dumped in a queue and a message handler then picks the message and gives it to message dispatcher. The dispatcher in turn delivers the message to the target node.

To enable message handler and dispatcher:

1. Execute the *psadmin* command.
2. Ensure that your domain has publish/subscribe servers configured in psadmin.
3. Set Pub/Sub servers to Yes, as shown in the following example of the PSADMIN Quick Configure menu:



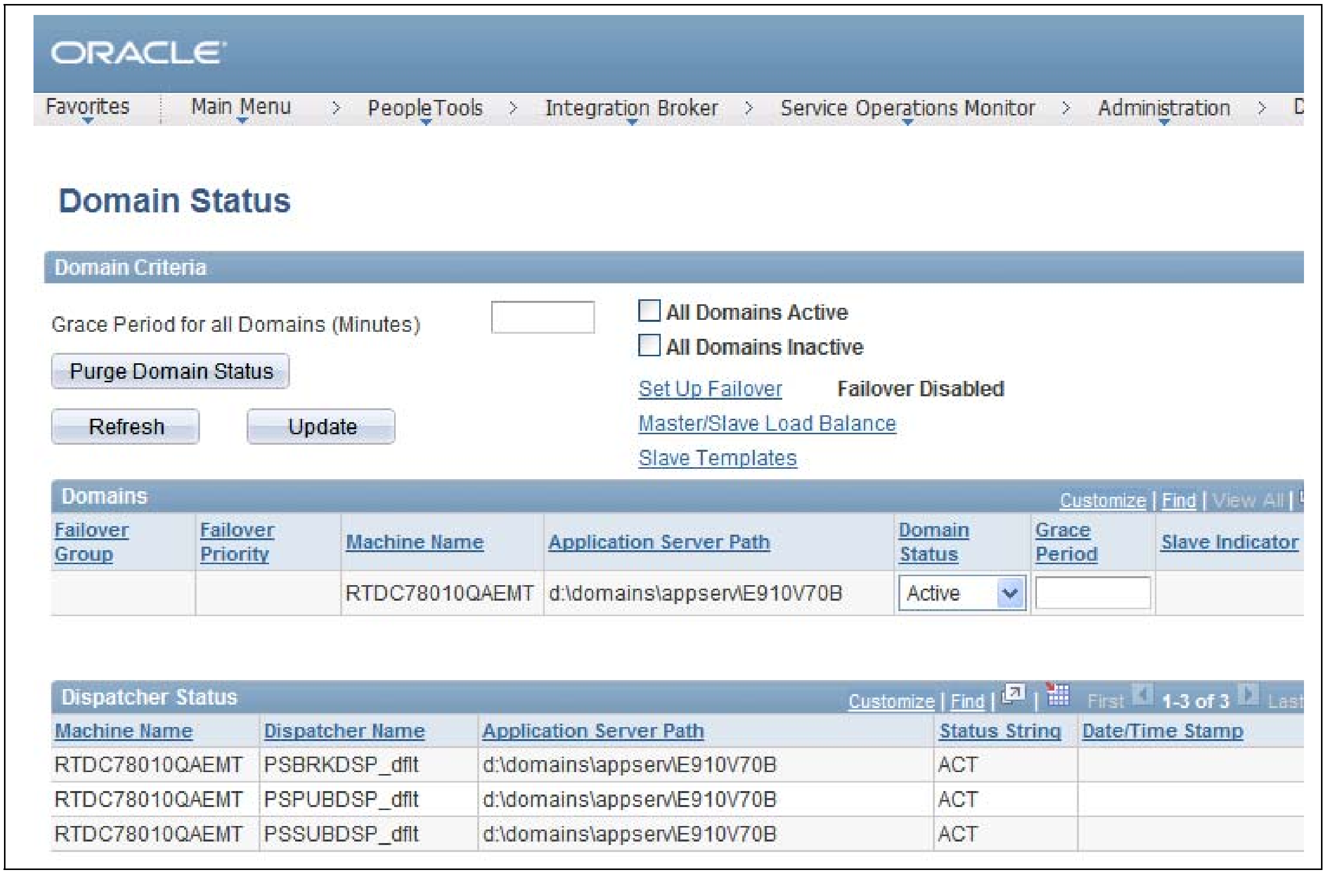
PSADMIN Quick-configure menu page

Note. PSADMIN configuration is used to support asynchronous messaging. After you start your application server, you see two new processes—one for Message Handler, and one for message dispatcher. After configuring your application server, you need to activate your domain through the PeopleSoft Pure Internet Architecture to ensure Handler and Dispatcher pick up your asynchronous messages.

To activate the domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

   The Domain Status page appears, as shown in the following example:



Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. Search for your domain.
4. In the Dispatcher Status group box, in the Domain Status field, select Active from the drop-down list box.
5. Click the Update button.

This completes the set up for PeopleSoft Asset Management Physical Inventory Web Services. For more information about the PeopleSoft Asset Management Physical Inventory cycle where service operations may be utilized, see the following:

See *PeopleSoft Asset Management 9.1 PeopleBook*, "Performing Asset Physical Inventory."

CHAPTER 19

Integrating PeopleSoft 9.1 IT Asset Management with Network Inventory Discovery Systems

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.1 IT Asset Management with Network Discovery Systems
- Configuring the Local Gateway
- Configuring the Inbound Nodes
- Activating Service Operations
- Managing Queue Status
- Activating the Domain for Asynchronous Messaging

Understanding the Integration of PeopleSoft 9.1 IT Asset Management with Network Discovery Systems

PeopleSoft 9.1 IT Asset Management integrates with additional component (third-party) Network Inventory Discovery Systems to provide the following functionality:

- Retrieve the physical attributes of IT Assets in the discovered Inventory database to compare to the assets in the financial books.
- Retrieve software of interest installed on the IT Assets.
- Process Hardware and Software Progress Report data based on integration data and user-defined parameters.

See "Configuring PeopleSoft 9.1 IT Asset Management with Network Discovery Systems."

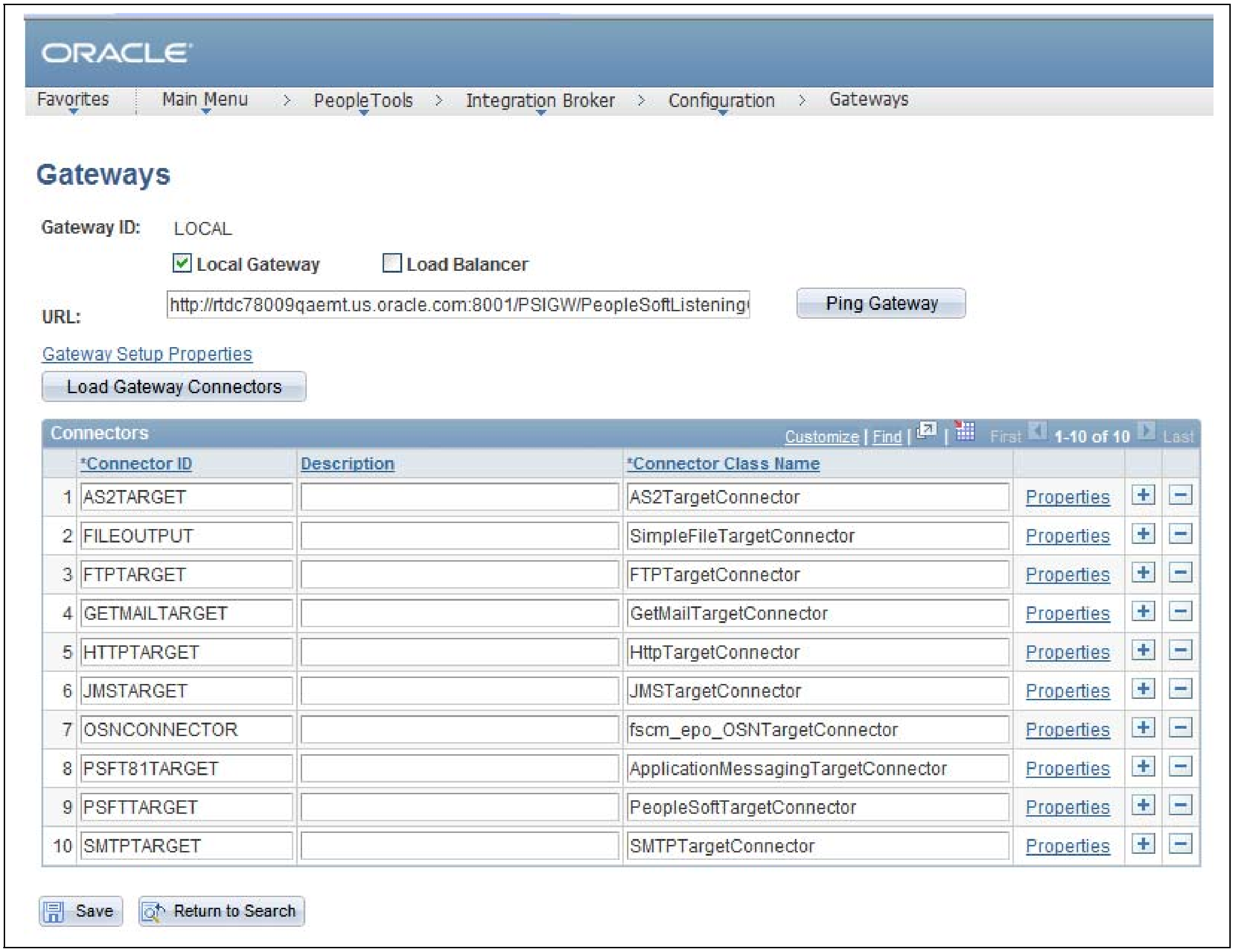
Task 19-1: Configuring the Local Gateway

To configure the local gateway:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search. The Gateways page for the Local gateway appears by default.
3. On the Gateways page, in the URL field, enter the URL *http://<WEBSRV:PORT>/PSIGW /PeopleSoftListeningConnector*.

4. Click the Load Gateway Connectors button.
5. Click Save.

   This ensures that all of the existing connectors install on the gateway, as shown in the following example:

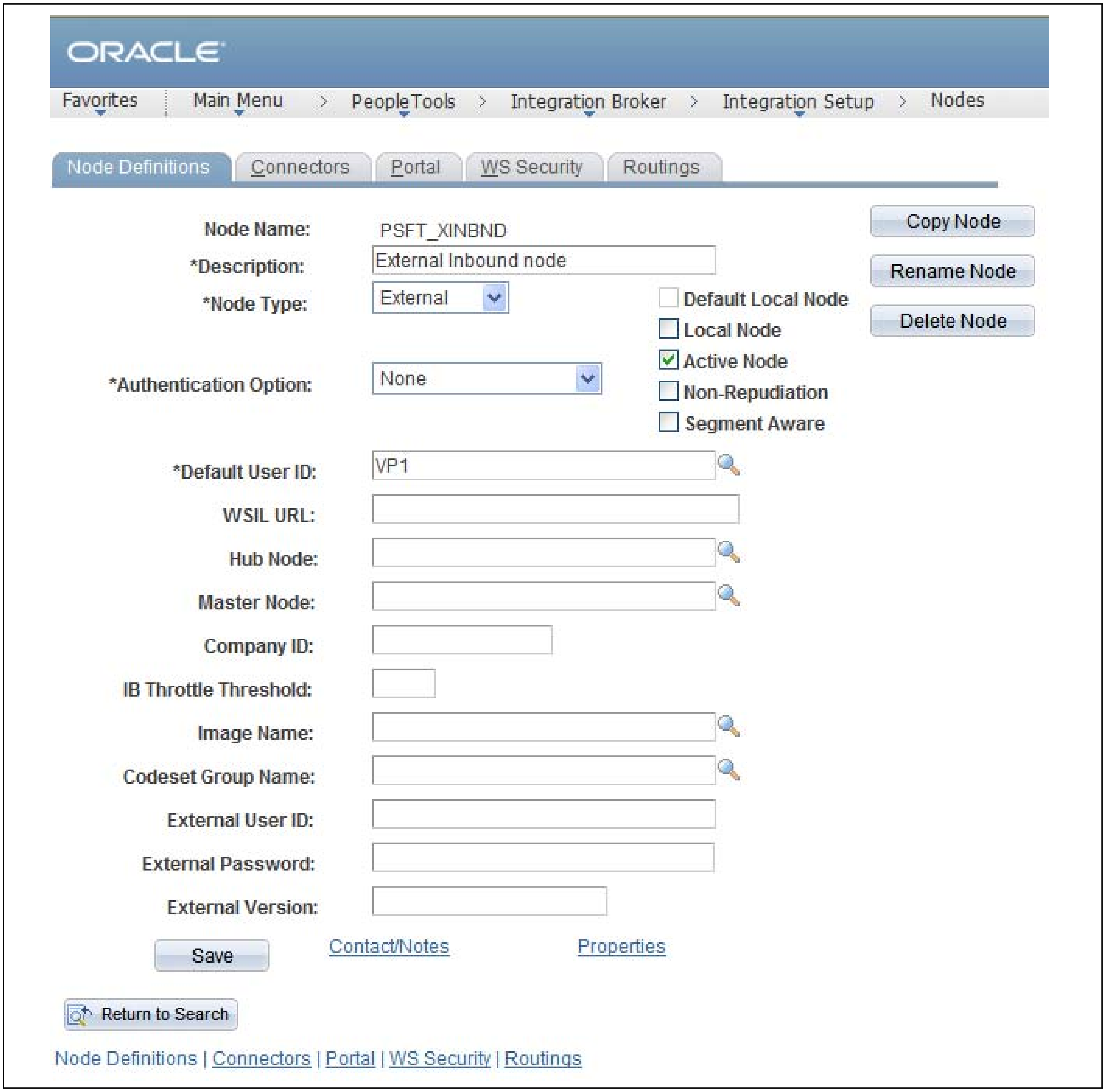


Gateways page

Task 19-2: Configuring the Inbound Nodes

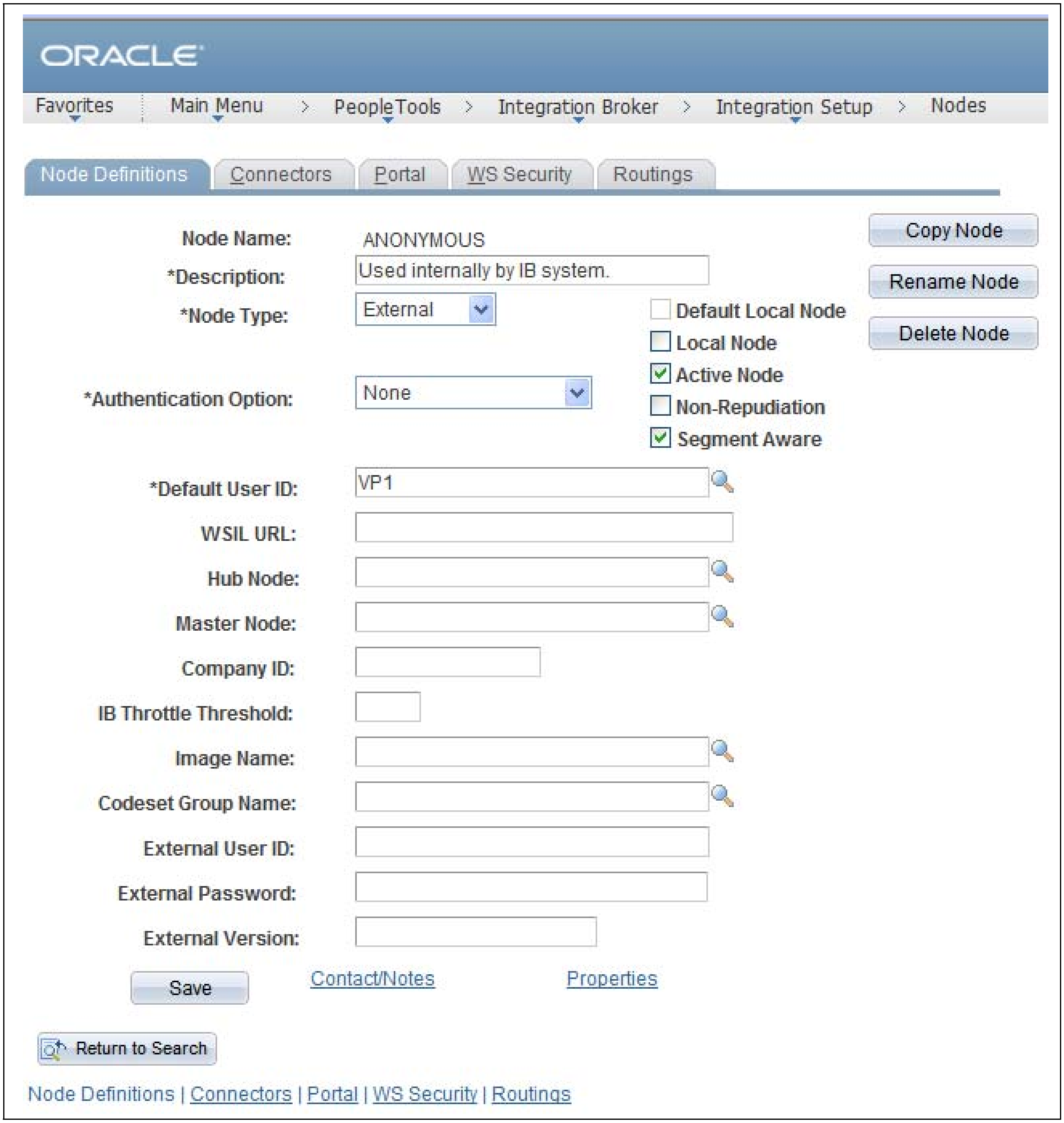
To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_XINBND.*
3. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the PSFT_XINBND node, as shown in the following example:



Node Definitions page for PSFT_XINBND

4. Click Save.
5. Click Return to Search.
6. On the Nodes search page, search for and select the node name *ANONYMOUS*.
7. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the ANONYMOUS node, as shown in the following example:



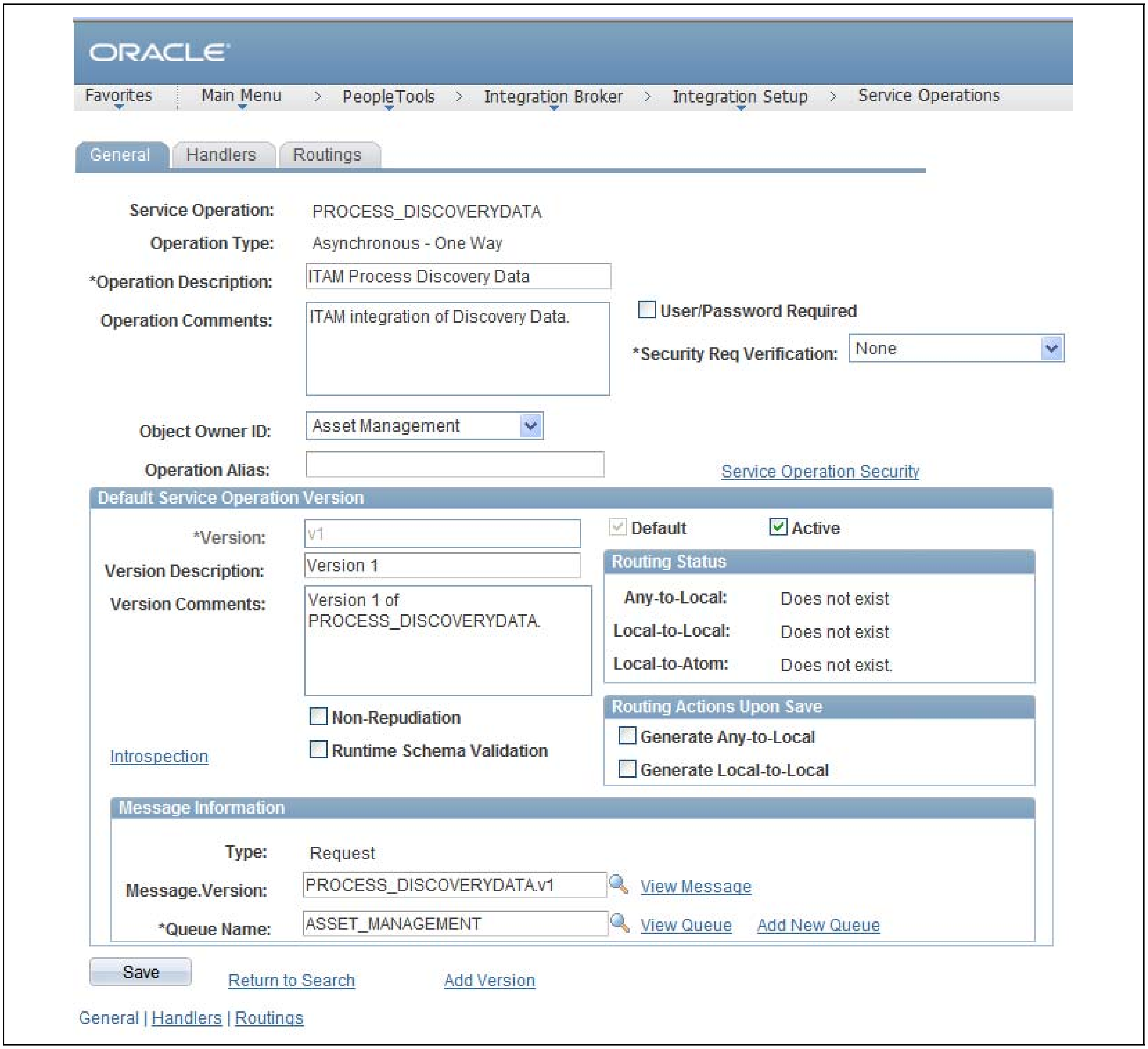
Node Definitions page for ANONYMOUS

8. Click Save.

Task 19-3: Activating Service Operations

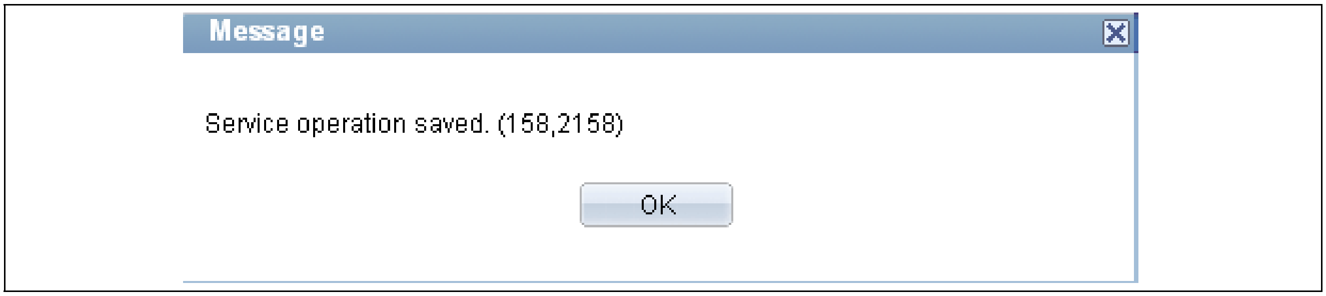
To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operations search page, search for and select the service operation *PROCESS_DISCOVERYDATA*.
3. On the Service Operations - General page, verify that the Active check box is selected, as shown in the following example.



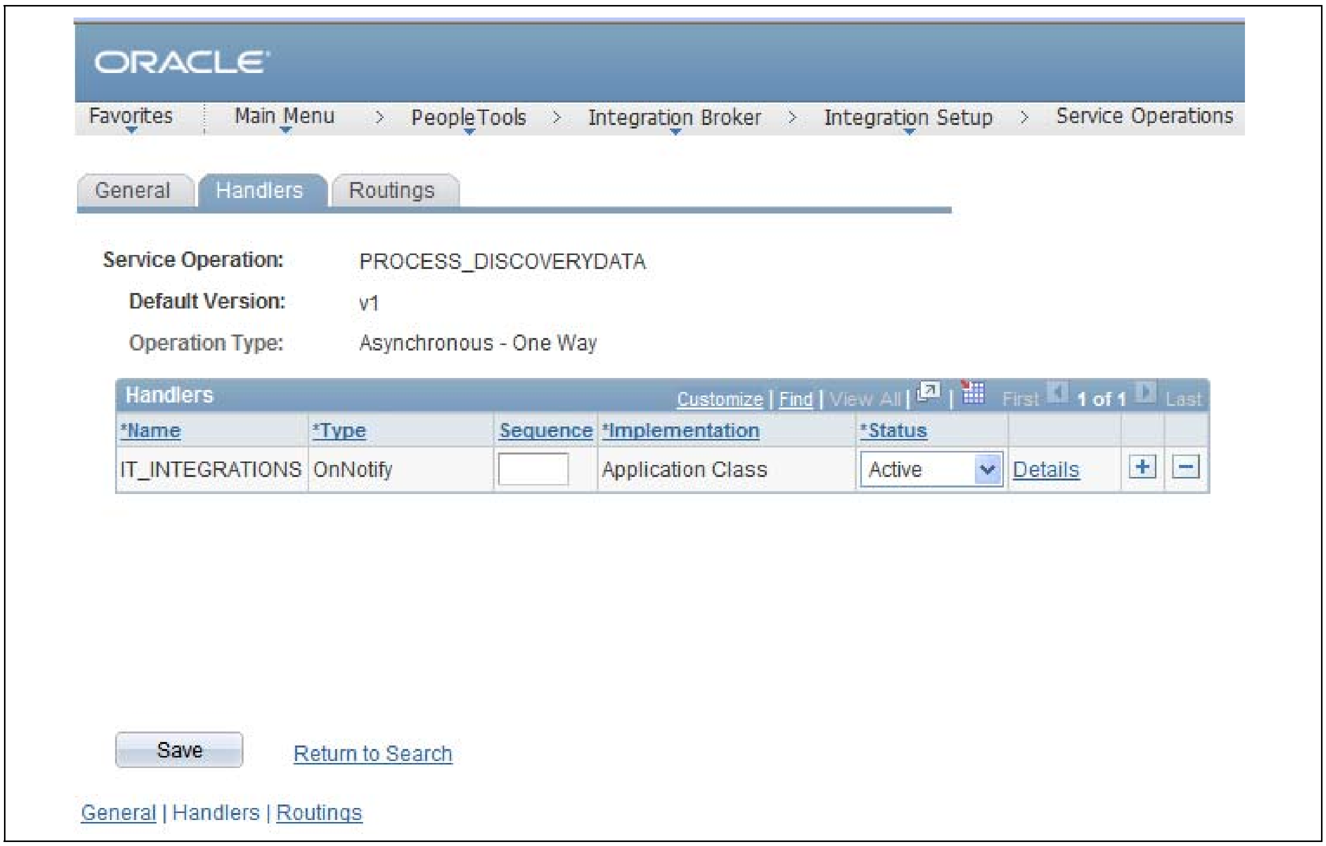
Service Operations - General page

4. Click Save.
5. The “Service Operation saved” message displays, as shown in the following example:



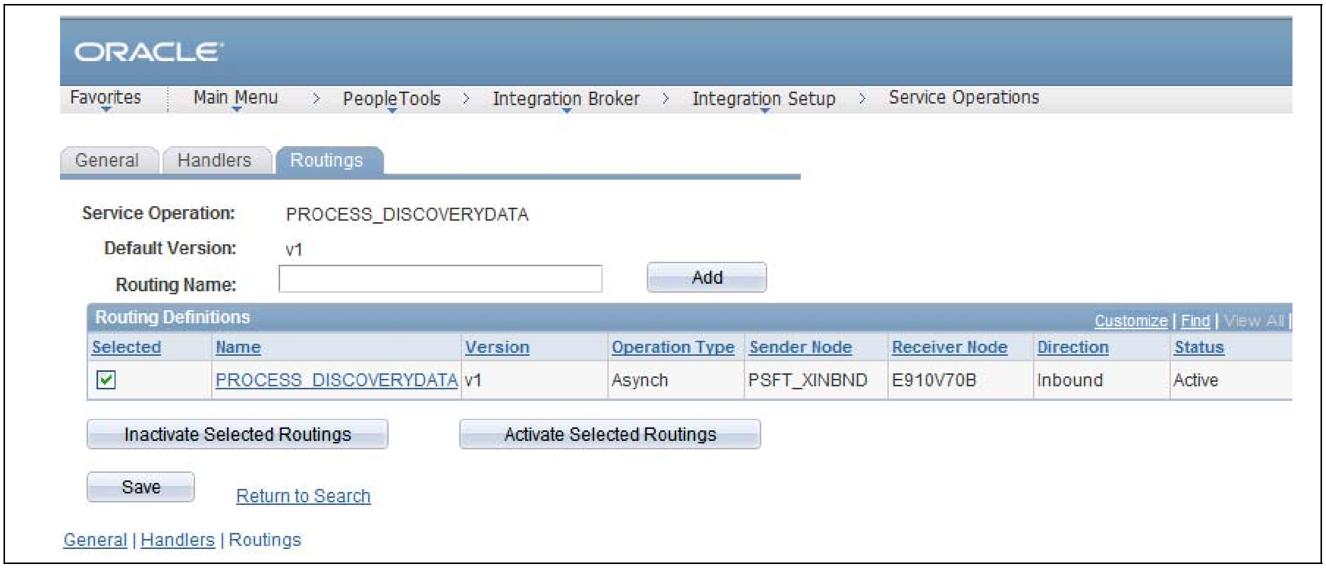
Service Operation - Saved Message page

6. Click OK.
7. On the General page, select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations - Handlers page

8. On the Handlers page, in the Handlers group box, in the Status field, select *Active* from the drop-down list box.
9. Click Save.
10. On the Handlers page, select the Routings tab to access the Routings page, as shown in the following example:



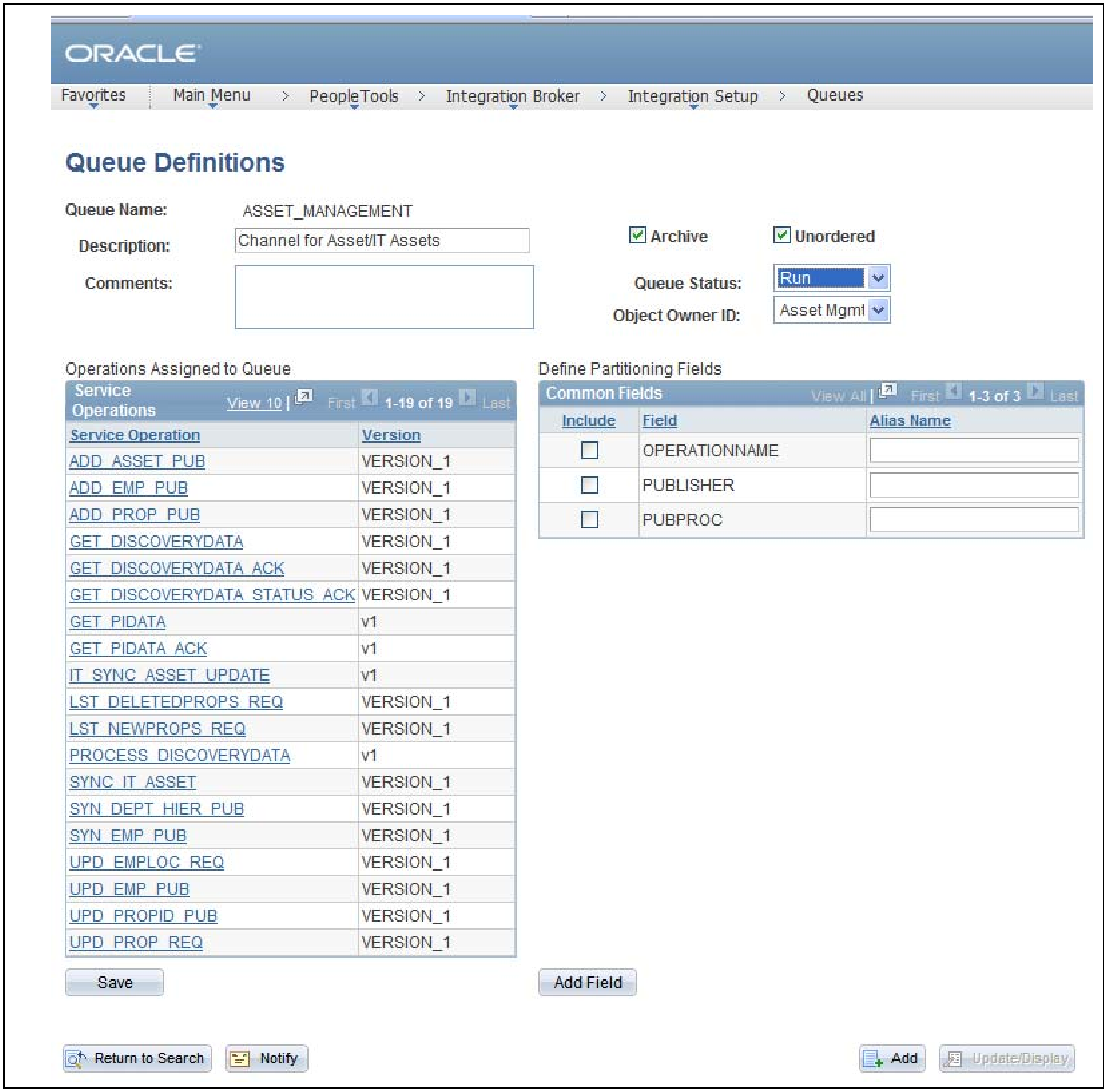
Service Operations - Routings page

11. On the Routings page, select the check box for the routing.
12. Click the Activate Selected Routings button.
13. Click Save.

Task 19-4: Managing Queue Status

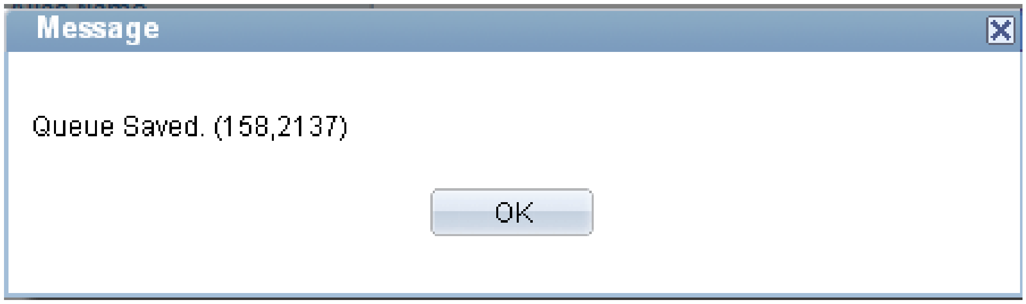
To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queue search page, search for and select the queue name *ASSET_MANAGEMENT*.
3. On the Queue Definitions page, in the Queue Status field, verify that *Run* is selected.
4. If the Queue Status is *Paused*, select *Run* in the Queue Status field, as shown in the following example:



Queue Definition

5. Click Save.
6. The “Queue Saved” message displays, as shown in the following example:



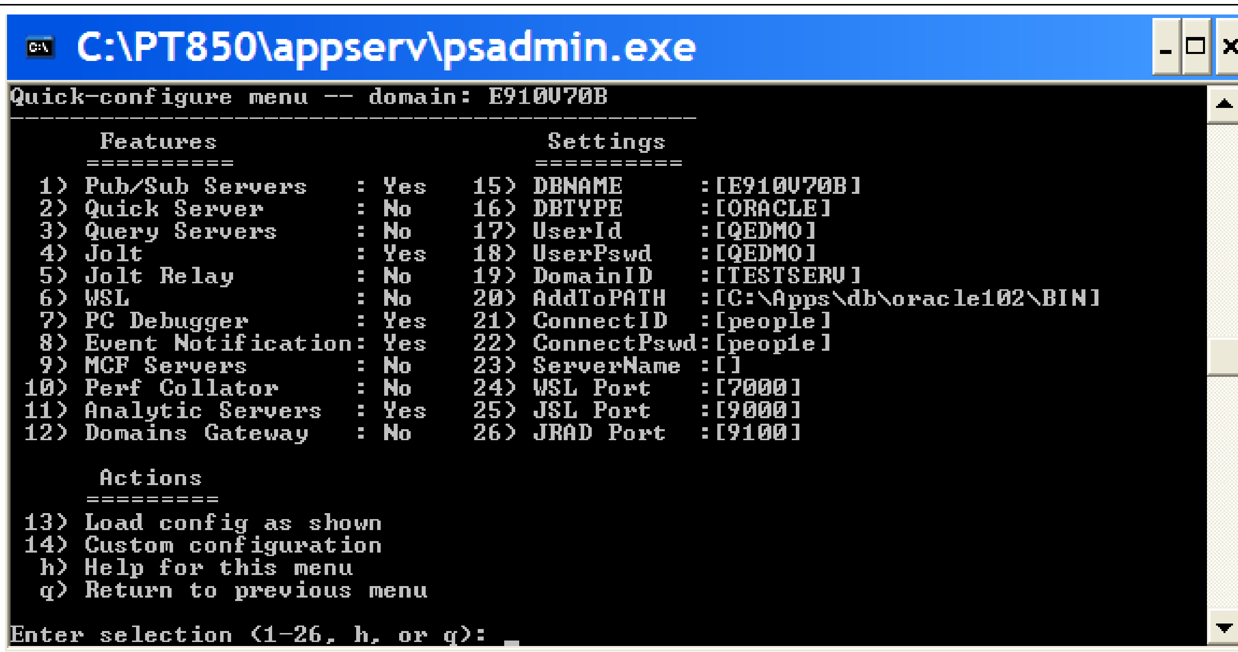
Queue Saved message

7. Click OK.

Task 19-5: Activating the Domain for Asynchronous Messaging

Asynchronous message handling in PeopleSoft is different from synchronous message handling. In the asynchronous mode, a message is dumped in a queue and a message handler then picks the message and gives it to message dispatcher; the dispatcher in turn delivers the message to the target node. To enable message handler and dispatcher, make sure that your domain has publish/subscribe servers configured in psadmin.

Set Pub/Sub servers to Yes, as shown in the following example:



```
C:\PT850\appserv\psadmin.exe
Quick-configure menu -- domain: E910V70B
----------------------------------------------------------
      Features                          Settings
     ==========                        ==========
  1) Pub/Sub Servers   : Yes   15) DBNAME     :[E910V70B]
  2) Quick Server      : No    16) DBTYPE     :[ORACLE]
  3) Query Servers     : No    17) UserId     :[QEDMO]
  4) Jolt              : Yes   18) UserPswd   :[QEDMO]
  5) Jolt Relay        : No    19) DomainID   :[TESTSERV]
  6) WSL               : No    20) AddToPATH  :[C:\Apps\db\oracle102\BIN]
  7) PC Debugger       : Yes   21) ConnectID  :[people]
  8) Event Notification: Yes   22) ConnectPswd:[people]
  9) MCF Servers       : No    23) ServerName :[]
 10) Perf Collator     : No    24) WSL Port   :[7000]
 11) Analytic Servers  : Yes   25) JSL Port   :[9000]
 12) Domains Gateway   : No    26) JRAD Port  :[9100]

      Actions
     =========
 13) Load config as shown
 14) Custom configuration
  h) Help for this menu
  q) Return to previous menu

Enter selection (1-26, h, or q): _
```

PSADMIN page

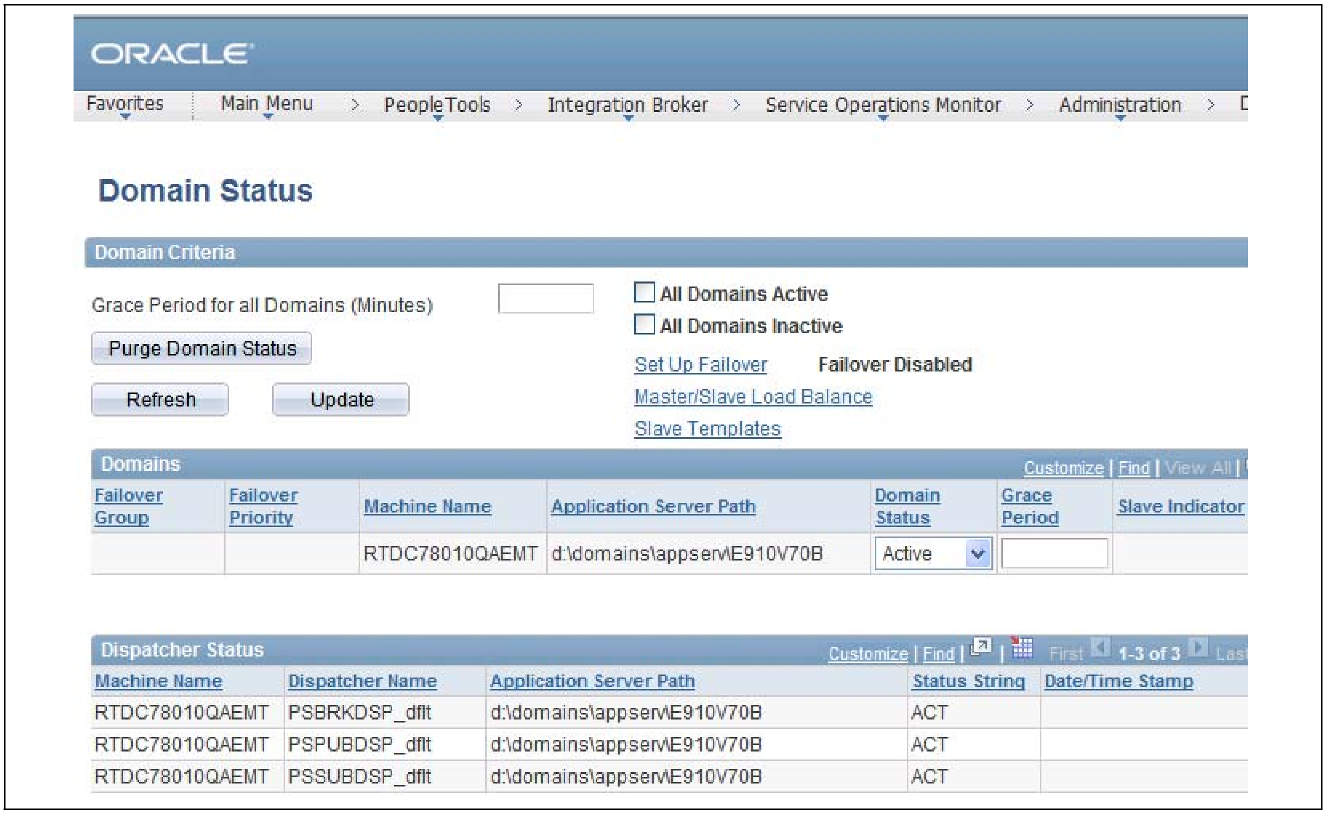
Note. PSADMIN configuration is used to support asynchronous messaging. After starting your application server, you see two new processes—one for Message Handler, and one for message dispatcher.

After configuring your application server, you need to activate your domain through the PeopleSoft Pure Internet Architecture to ensure Handler and Dispatcher pick up your asynchronous messages.

To activate the domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

   The Domain Status page appears, as shown in the following example:



Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. Search for your domain/machine name, and in the Domain Status field, select *Active* from the drop-down list box.
4. Click the Update button.

This completes the set up for PeopleSoft Asset Management with Network Inventory Discovery Systems. For more information about this integration:

See *PeopleSoft Asset Management 9.1 PeopleBook*, "Working with the IT Asset Inventory Tool."

CHAPTER 20

Part III: Installing PeopleSoft SCM Applications

Understanding Part III

This section includes:

- Installing PeopleSoft 9.1 eProcurement
- Installing PeopleSoft 9.1 Mobile Inventory Management
- Configuring WS-Security for PeopleSoft Mobile Inventory Management
- Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management
- Configuring eMail URLS in PeopleSoft SCM Applications
- Setting Up PeopleSoft 9.1 Supplier Contract Management
- Setting Up PeopleSoft SCM Pagelets
- Granting Access to Navigation Pages in PeopleSoft SCM
- Accessing PeopleSoft SCM Applications in PeopleSoft 9.1 Portal Solutions

CHAPTER 21

Installing PeopleSoft 9.1 eProcurement

Understanding PeopleSoft eProcurement 9.1

PeopleSoft eProcurement is an application that enables all employees to use web pages to meet their procurement needs. Using electronic catalogs, employees can order the supplies and services they need to do their jobs. Buyers can use PeopleSoft eProcurement to efficiently create and process purchase orders. Suppliers can use PeopleSoft eProcurement to enter invoices.

Note. To install PeopleSoft eProcurement, you must have administrator access rights to the local machine that you are using for the installation.

Task 21-1: Installing PeopleSoft eProcurement CUP Item Export

When you install the PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 (FSCM Feature Pack 2) application, the system downloads the CUP (catalog update process) Export setup program on your workstation.

To install PeopleSoft eProcurement CUP Item Export:

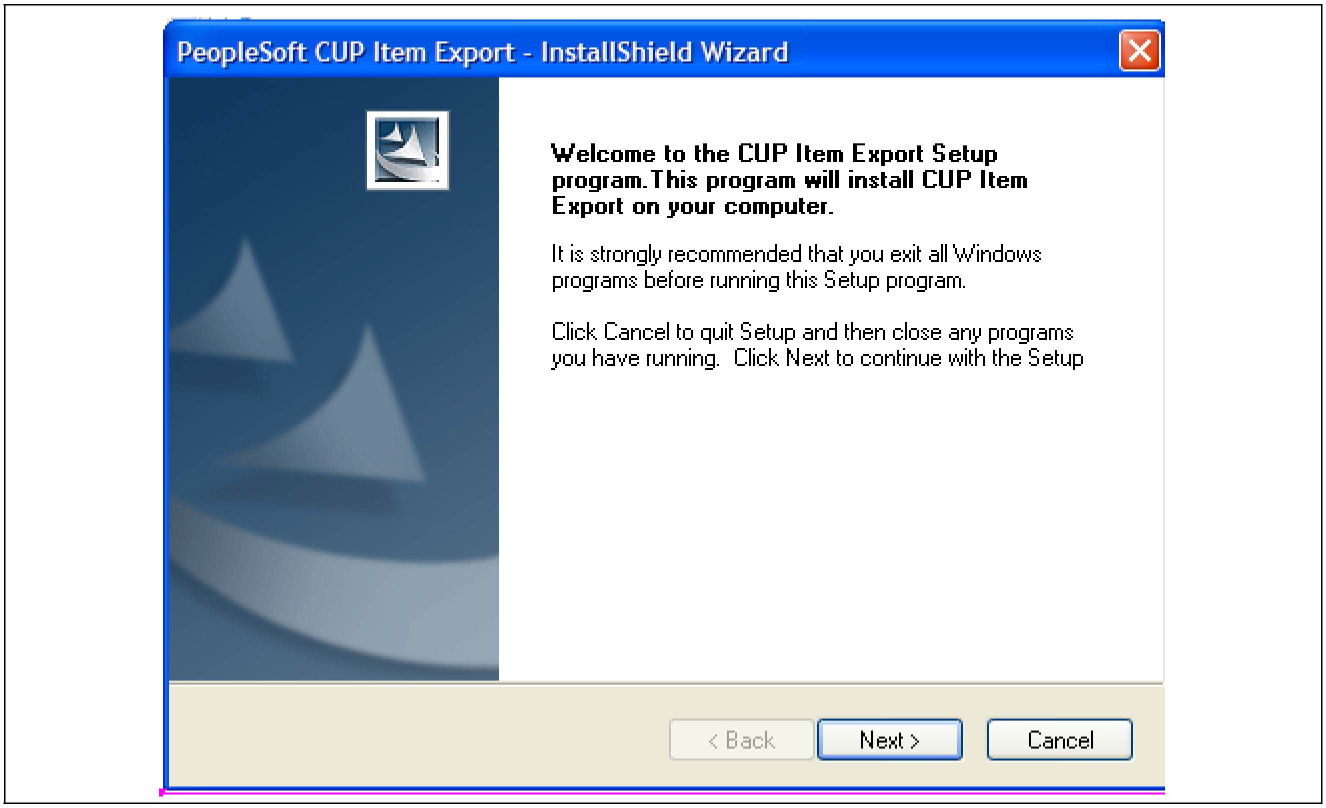
The installation of the PeopleSoft FSCM 9.1 Feature Pack 2 application downloads the PeopleSoft eProcurement CUP setup to the following directory path on your local drive:

```
C:\<PS_APP_HOME>setup\eProcurement\eng\Setup.exe
```

Note. You can find the Setup.exe file in the folder named after your language code. For example, if the language is English, the Setup.exe should reside in the eng folder.

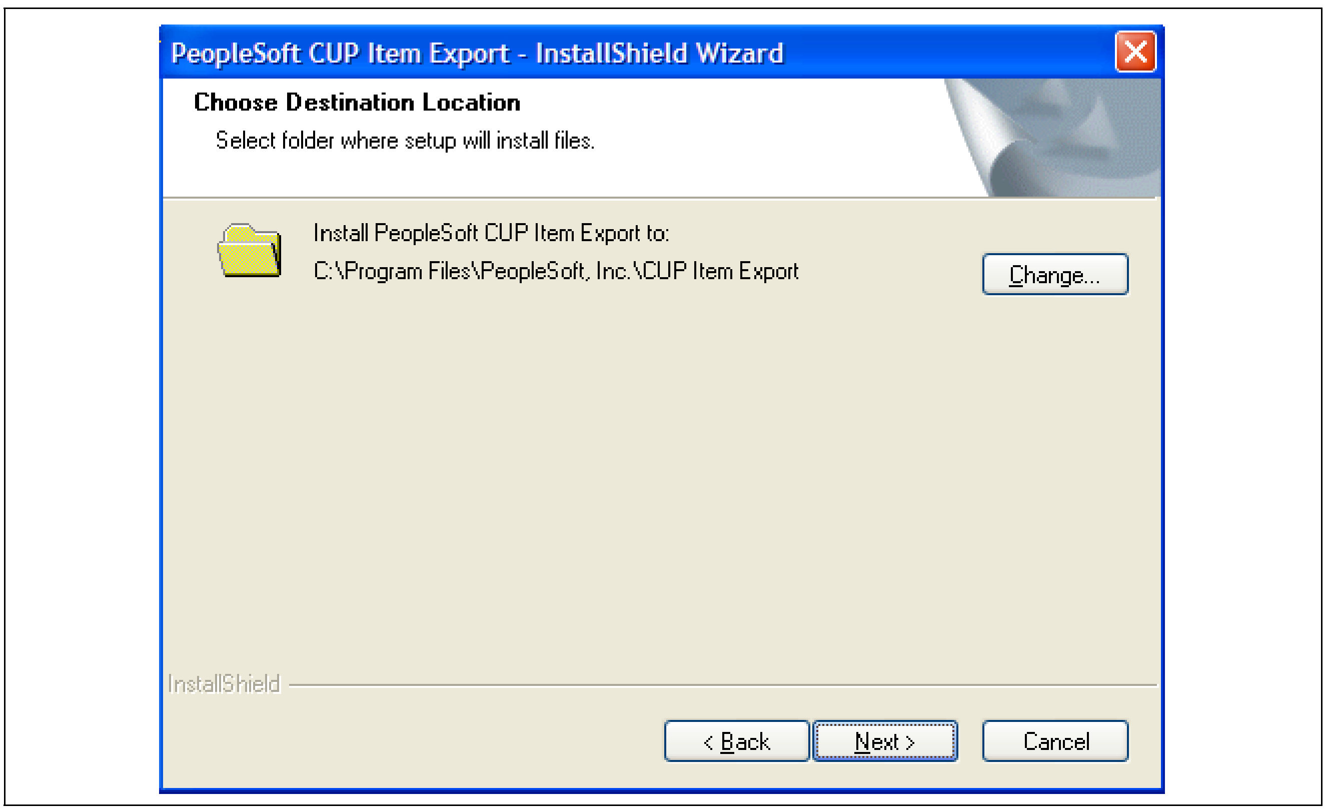
1. Double click Setup.exe.

   The PeopleSoft CUP Item Export - Welcome page appears, as shown in the following example:



CUP Item Export Welcome window

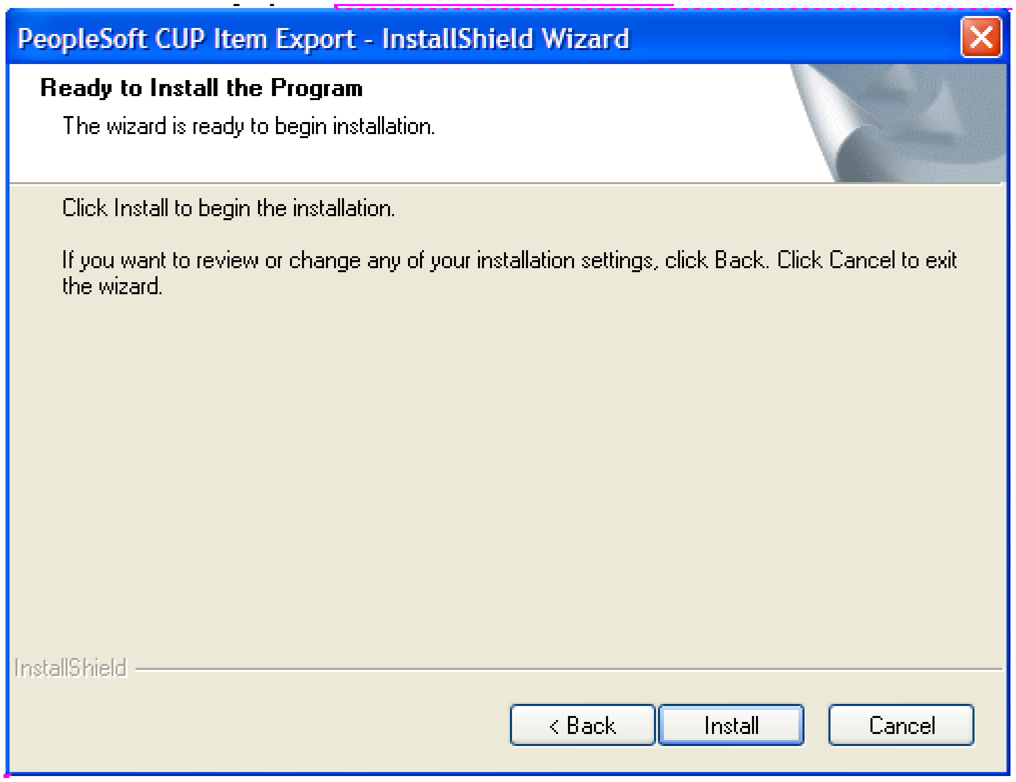
2. Click Next to access the Choose Destination Location page, as shown in the following example:



Choose Destination Location window

The Choose Destination Location window displays the default destination (C:\Program Files\PeopleSoft, Inc\CUP Item Export) where the installer loads the CUP Item Export Setup program. To use another installation destination, click Browse and enter the new destination path, or navigate to another folder or network drive.

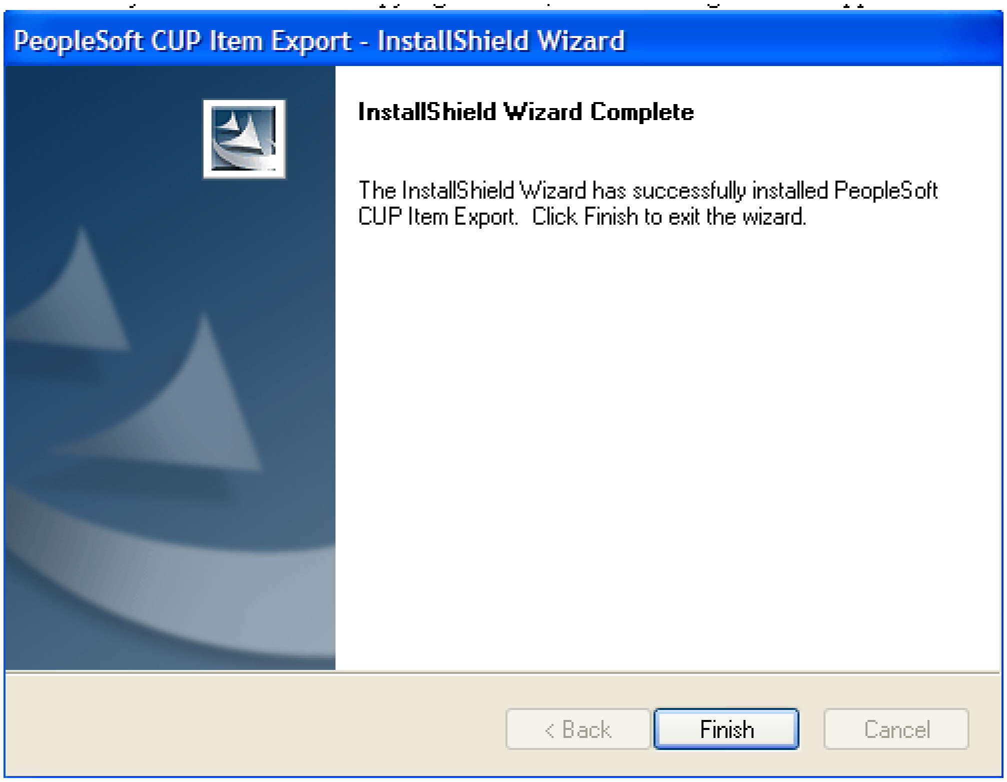
3. Click Next to display the *Ready to Install the Program* page, as shown in the following example:



Ready to Install the Program window

4. Click Install to start copying files.

   After the system finishes copying the files, the PeopleSoft InstallShield Wizard Complete page appears, as shown in the following example:



Select Program Folder window

5. Click Finish

   The CUP Item Export is now locally installed on your hard drive.

CHAPTER 22

Installing PeopleSoft 9.1 Mobile Inventory Management

This chapter discusses:

- Understanding the PeopleSoft 9.1 Mobile Inventory Management Product
- Prerequisites
- Accessing Installation Files
- Installing the Oracle WebLogic Server for Mobile
- Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Applying the PeopleSoft Mobile Inventory Management Authentication Provider
- Installing the PeopleSoft Database
- Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server
- Undeploying the Mobile Application

Understanding the PeopleSoft 9.1 Mobile Inventory Management Product

The PeopleSoft Mobile Inventory Management product provides tools that integrate handheld bar code data collection devices with the PeopleSoft Supply Chain Management system, improving efficiency and cost savings. Oracle Application Developer Framework uses the PeopleSoft Integration Broker and PeopleSoft Component Interfaces (CIs) to enable this process. The Oracle Application Developer Framework software is part of Oracle Fusion Middleware.

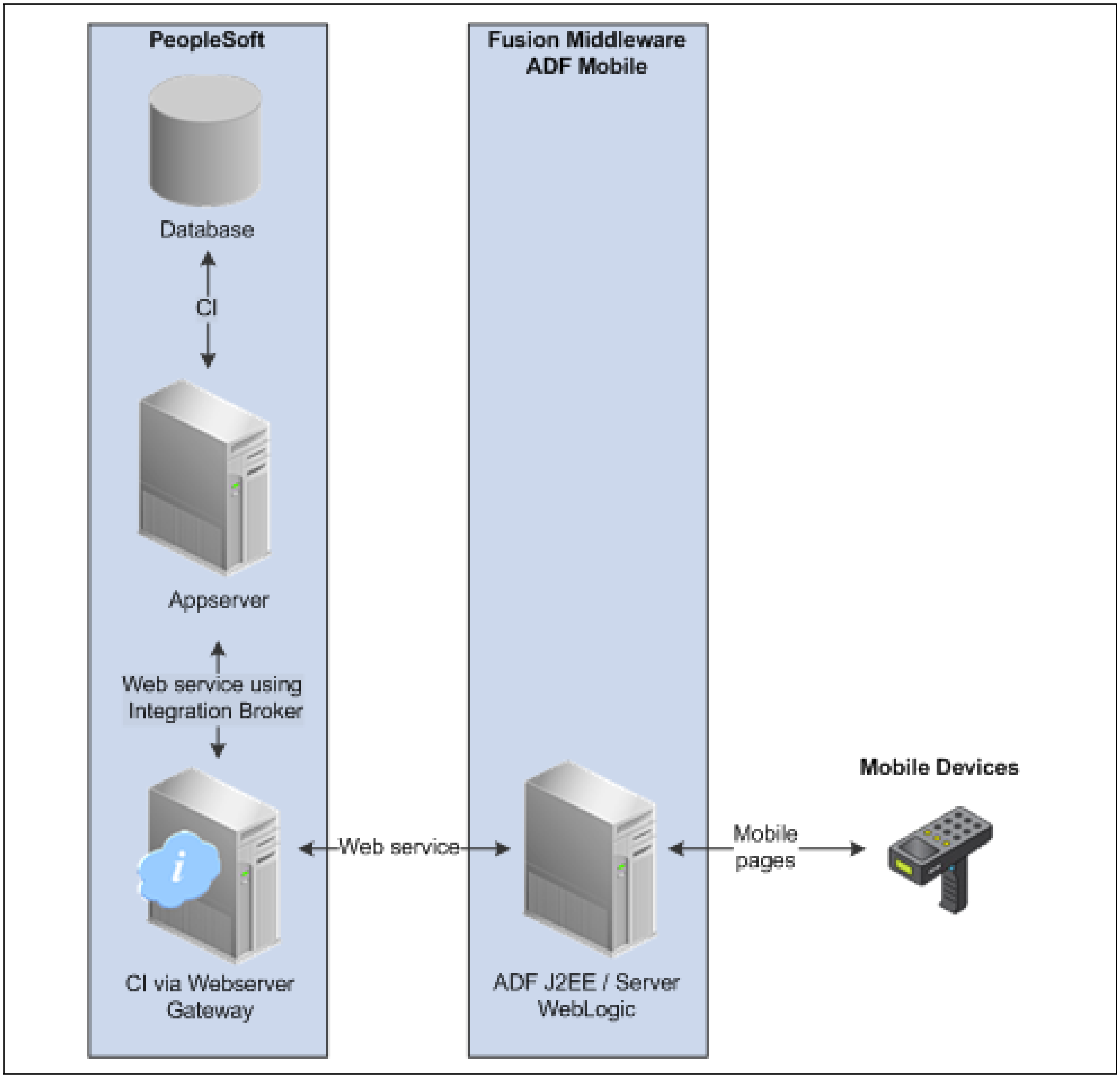
PeopleSoft CIs are PeopleTools components that enable exposure of a PeopleSoft component for synchronous access from another application and act as a web service in the PeopleTools Integration Broker. The system then publishes web services through the PeopleSoft Integration Broker to pass transaction data between PeopleSoft applications and additional component (third-party) applications.

For more information on setting up PeopleSoft application servers and web services, refer to the task *"Installing the PeopleSoft Database"* later in this chapter, as well as the following reference documents that are available on My Oracle Support:

See *PeopleTools 8.52: System and Server Administration PeopleBook,* for your database platform.

See *PeopleSoft Mobile Inventory Management 9.1 PeopleBook*

The following diagram illustrates the interface between PeopleSoft and mobile devices:



Overview of the interface between PeopleSoft and mobile devices

Prerequisites

The following requirements must be met before you install the PeopleSoft 9.1 Mobile Inventory Management product:

Note. Before proceeding with your installation, check My Oracle Support, Oracle Software Delivery Cloud (formerly Oracle E-Delivery), and Oracle Technology Network to ensure that you have the most current “Fixes Required at Install,” bundles and documentation for the products that you are installing.

See http://support.oracle.com

See http://edelivery.oracle.com

See http://www.oracle.com/technetwork/index.html

To run PeopleSoft 9.1 Mobile Inventory Management, you must comply with the following:

- PeopleSoft PeopleTools 8.52.02 or higher is the minimum requirement to run PeopleSoft Mobile Inventory Management 9.1 with PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2.

  See *PeopleTools 8.52 Installation Guide* for your database platform.

  Oracle recommends that you check the Oracle Software Delivery Cloud (formerly Oracle E-Delivery) and My Oracle Support for the latest PeopleSoft PeopleTools patches.

  See http://edelivery.oracle.com

  See http://support.oracle.com
- PeopleSoft Financials/Supply Chain Management 9.1 Application.

  To run PeopleSoft 9.1 Mobile Inventory Management, you must be using PeopleSoft Financials/Supply Chain Management 9.1, Bundle 16, PeopleSoft Financials/Supply Chain Management 9.1 Maintenance Pack 8, or PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2.
- The current 64-bit Java, if you are installing on a 64-bit server.

  Go to www.java.com to download the current 64-Bit Java to use with the PeopleSoft Mobile Inventory Management installation.
- Oracle Application Developer 11gR1 (11.1.1.4 or higher, Oracle Application Developer 11gR2 is not yet supported).

  Before you install PeopleSoft Mobile Inventory Management 9.1, you must complete the installation of Oracle Application Development Runtime 11.1.1.4 (or higher) on an Oracle WebLogic 10.3.4 (or higher) Server instance. You can access the complete Oracle Application Developer 11.1.1.4 (or higher) Installation Guide and the complete Oracle WebLogic 10.3.4 (or higher) Installation Guide from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm

  See *Oracle Application Developer 11.1.1.4 Installation Guide*

  See *Oracle WebLogic 10.3.4 Installation Guide*
- PeopleSoft Inventory 9.1.

  Before you install PeopleSoft Mobile Inventory Management 9.1, you must complete the installation and set up of PeopleSoft Inventory 9.1.
- PeopleSoft Purchasing 9.1.

  Before you install PeopleSoft Mobile Inventory Management 9.1, you must complete the installation and set up of PeopleSoft Purchasing 9.1. This is *only* a requirement if you plan to use receiving and delivery.
- Run audit reports to clean your target databases.

  Oracle recommends that you run audit reports to ensure that your target databases are clean, before you begin the installation process.

For hardware and software information, you can refer to the following documents that are available on My Oracle Support and the Oracle Technology Network:

See *PeopleTools 8.52 Hardware and Software Requirements Guide* for your database platform.

See *PeopleSoft Financials/Supply Chain Management 9.1 Feature Pack 2 Hardware and Software Requirements,* "Defining PeopleSoft 9.1 Mobile Inventory Management Hardware and Software Requirements."

See *Oracle Application Development Framework 11.1.1.4 Hardware and Software Requirements.*

Task 22-1: Accessing Installation Files

To run PeopleSoft Mobile Inventory Management, you must be using PeopleSoft Financials/Supply Chain Management 9.1, Bundle 16. You can access the PeopleSoft Mobile Inventory Management installation steps as part of Bundle 16.

This PeopleSoft Mobile Inventory Management installation chapter lists PeopleSoft Financials/Supply Chain Management 9.1, Bundle 16, as one of the prerequisites for PeopleSoft Mobile Inventory Management. See the preceding section titled *“Prerequisites”* for additional prerequisite information.

Use the Oracle Technology Network to access and download prerequisite application software and installation documentation as follows:

- To access the current Oracle WebLogic installation files, access the Oracle Technology Network at *http://www.oracle.com/technetwork/index.html*, select Downloads, Fusion Middleware 11g, and then in the "For Development" section select the current version.
- To access the Oracle Application Development Runtime Installer, access the Oracle Technology Network at *http://www.oracle.com/technetwork/index.html*, select Downloads, JDeveloper and ADF, and then in the Oracle Application Development Runtime Installer section (on that page) click the Download link.

Check the Oracle Technology Network, Oracle Software Delivery Cloud (formerly Oracle E-Delivery), and My Oracle Support to ensure that you obtain the most current fixes required at install, bundles and documentation for the products that you are installing.

See http://www.oracle.com/technetwork/index.html

See http://edelivery.oracle.com

See http://support.oracle.com

Note. After installation, you can locate all of the files that are associated with the PeopleSoft 9.1 Mobile Inventory Management installation in the location where you installed Bundle 16, PeopleSoft FSCM 9.1 Maintenance Pack 8, or PeopleSoft FSCM 9.1 Feature Pack 2. The files reside in <PS_APP_HOME>\setup\oracle\adf \MobileInventory.

Task 22-2: Installing the Oracle WebLogic Server for Mobile

This section discusses:

- Understanding the Oracle WebLogic Server Installation for Mobile
- Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management
- Starting the Configuration Wizard to Define a New Domain

Understanding the Oracle WebLogic Server Installation for Mobile

Oracle Application Developer for Mobile installs on top of the Oracle WebLogic Server. Therefore, you must first install the Oracle WebLogic Server.

The Oracle WebLogic Server supports the Oracle Application Developer and the Application Developer Mobile browser that extends Oracle Application Developer to browsers running on mobile devices. The following steps detail a *general* installation of the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management.

Task 22-2-1: Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management

To install the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management:

Note. You can access the complete installation guide for the Oracle WebLogic Server 10.3.4 (or higher) from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm

---

1. Download the Oracle WebLogic Server installation files from the Oracle Technology Network.

   Access the Oracle Technology Network at *http://www.oracle.com/technetwork/index.html*, select Downloads, Fusion Middleware 11g, and then in the "For Development" section select the current version.

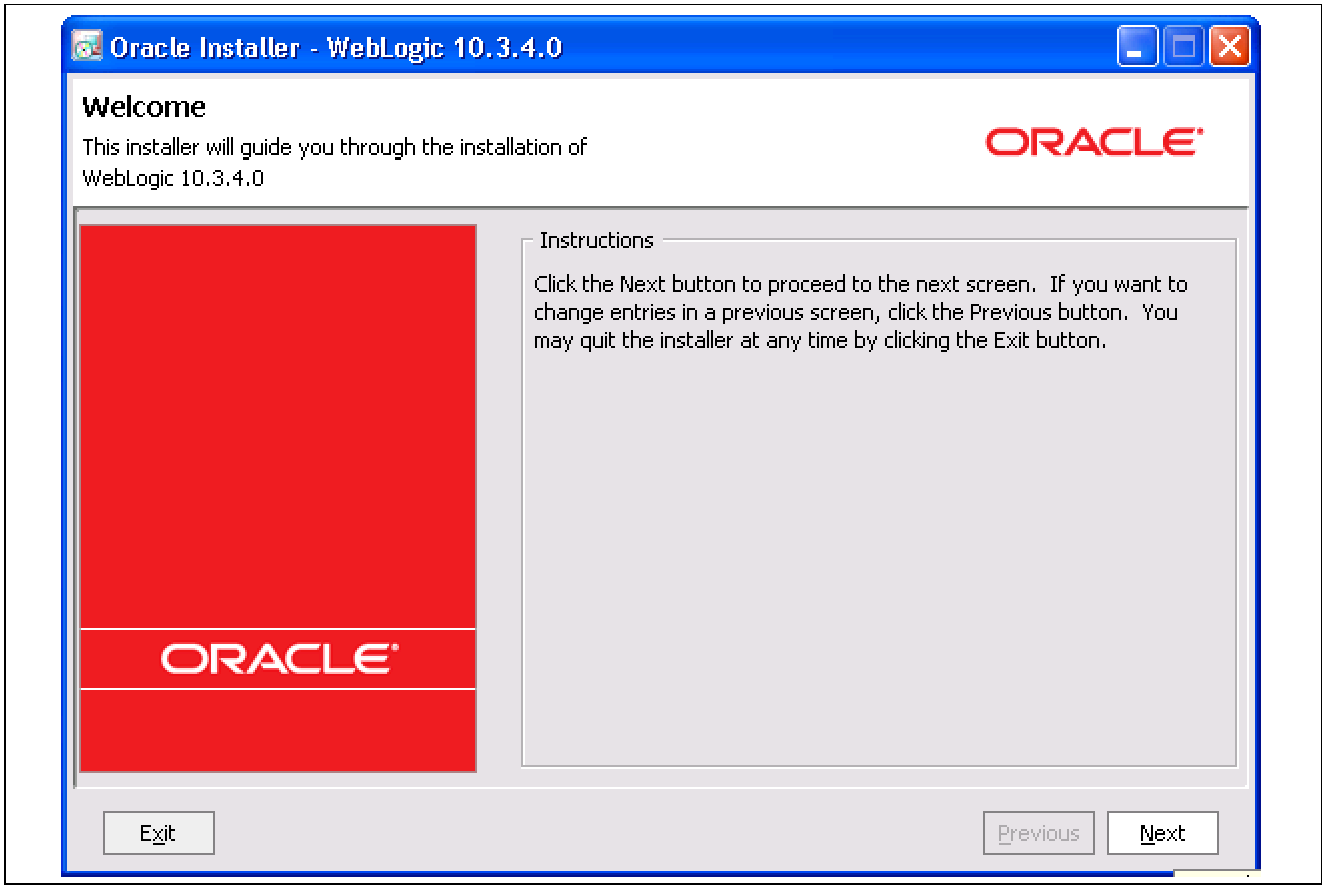
   See “Accessing Installation Files”

   Note. The following installation instructions are based on the Microsoft Windows operating system. For UNIX installation instructions, see the Oracle® Fusion Middleware Installation Guide for the Oracle WebLogic Server. Graphical and console mode are supported for Oracle WebLogic installation.

   ---

2. Double-click the executable file to start the Oracle Installer Wizard that launches the Oracle WebLogic Server 11g R1.

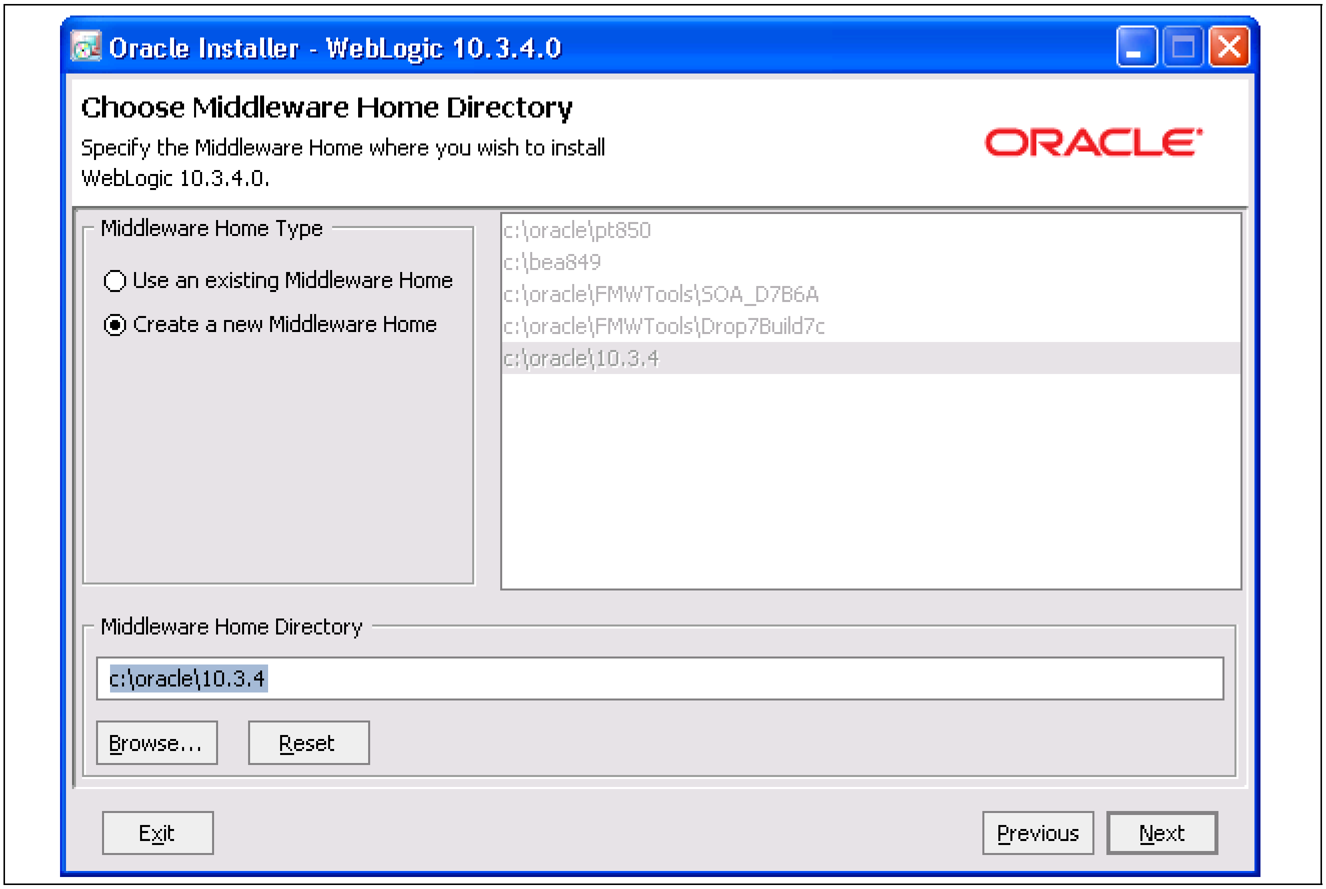
   The Oracle Installer - WebLogic 10.3.4.0 (or higher) Welcome page appears, as shown in the following example:



Oracle Installer - WebLogic Welcome page

3. On the Welcome page, click Next.

   The Oracle Installer WebLogic - Choose Middleware Home Directory page appears, as shown in the following example:

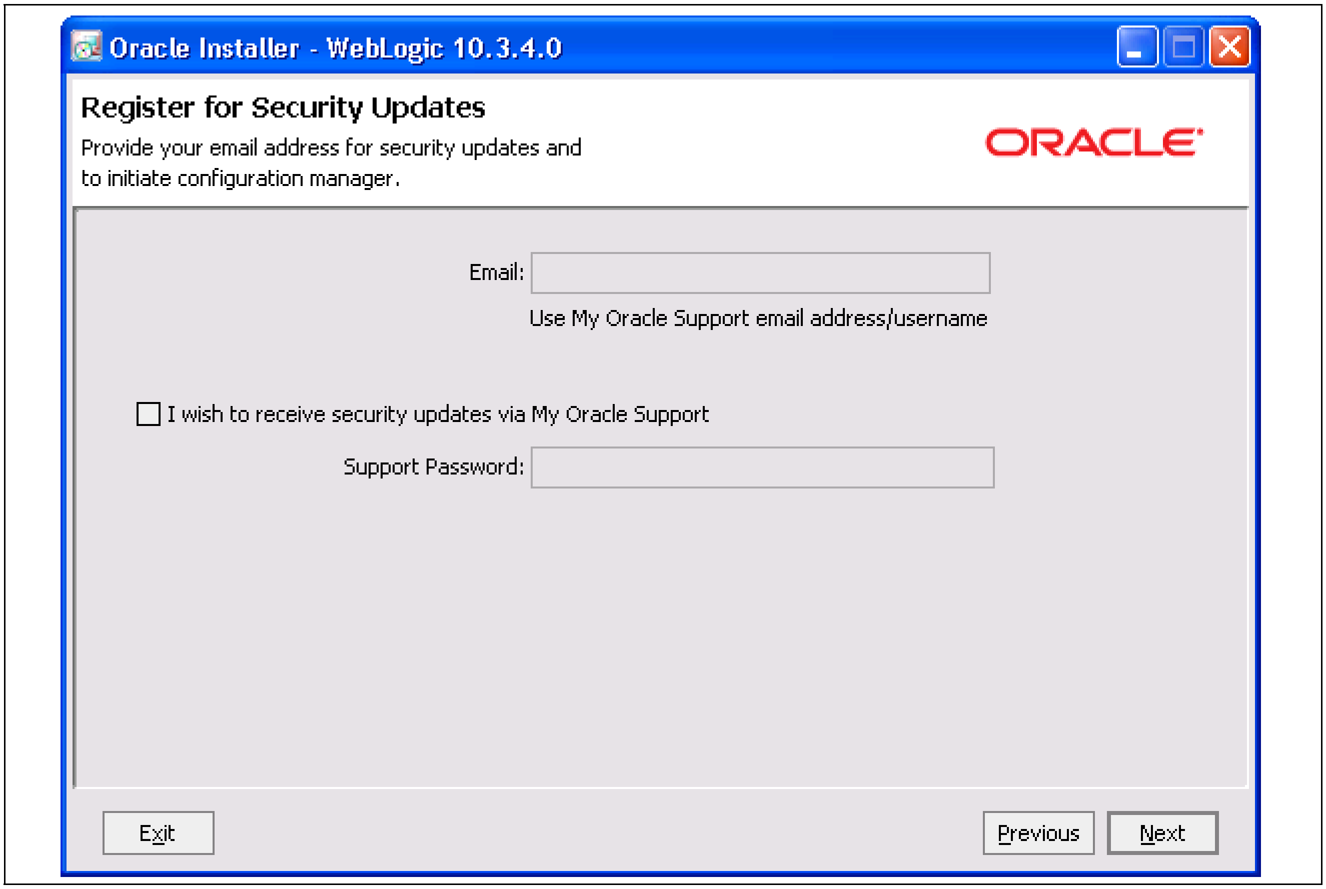


Oracle Installer - WebLogic Choose Middleware Home Directory page

4. On the Choose Middleware Home Directory page, do the following:
   - Select the option *Create a new Middleware Home*.
   - In the Middleware Home Directory field, enter a value.

     For example: *c:\oracle\10.3.4*
5. Click Next.

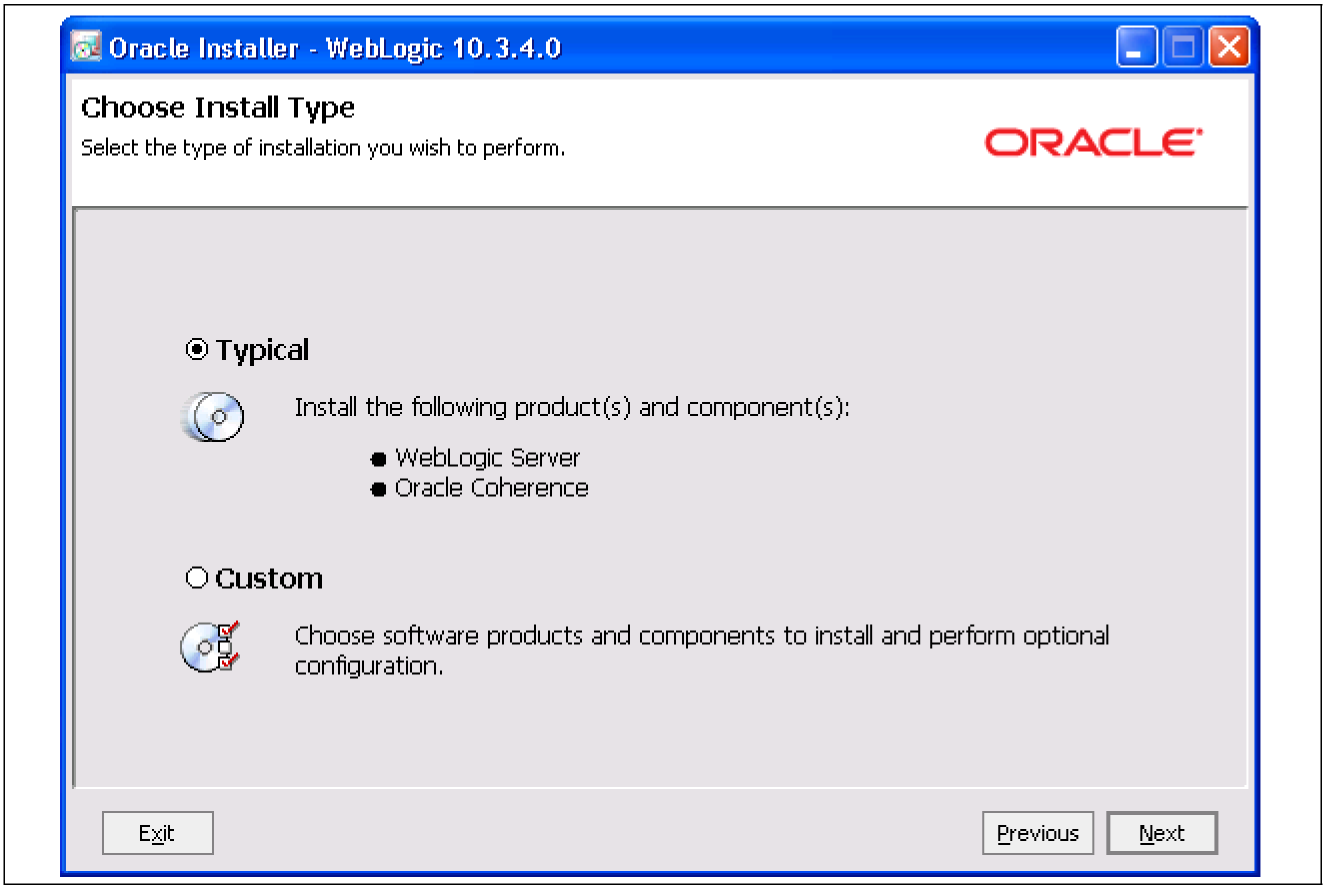
   The Oracle Installer WebLogic - Register for Security Updates page appears, as shown in the following example:



Oracle Installer - WebLogic Register for Security Updates page

6. The Register for Security Updates page requires no action. Click Next.

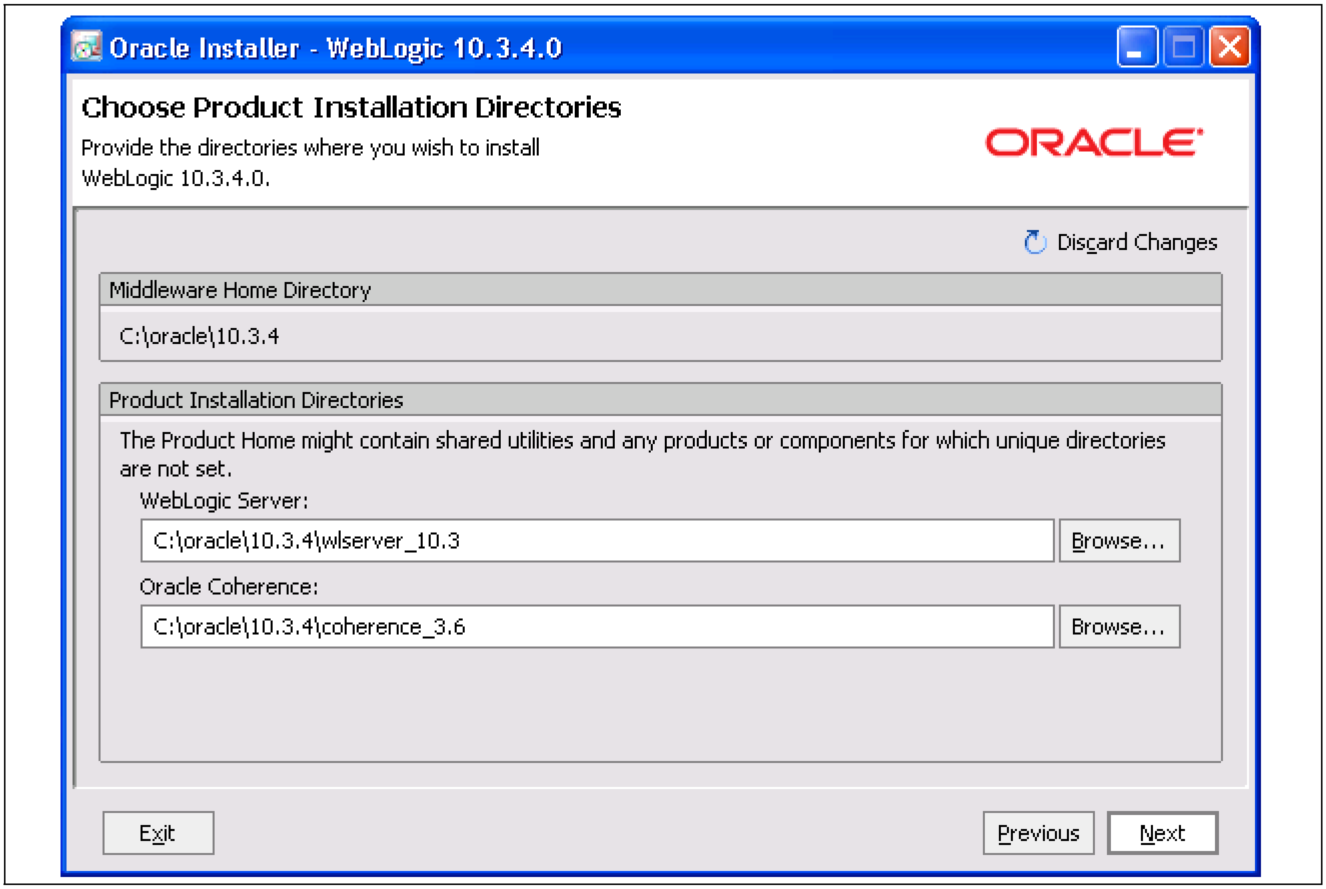
   The Oracle Installer WebLogic - Choose Install Type page appears, as shown in the following example:



Oracle Installer - WebLogic Choose Install Type page

7. On the Choose Install Type page, select the *Typical* option, and then click Next.

   The Oracle Installer WebLogic - Choose Product Installation Directories page appears, as shown in the following example:



Oracle Installer - WebLogic Choose Product Installation Directories page

8. On the Choose Product Installation Directories page, in the WebLogic Server field, browse to the directories where you want to install Oracle WebLogic. Click Next.

   For a *general* installation, you can accept the default for the Oracle Coherence field.

Note. For more information and details about Oracle Coherence and the Oracle WebLogic Server installation, access the complete Oracle WebLogic Server 10.3.4 (or higher) Installation Guide from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm

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Task 22-2-2: Starting the Configuration Wizard to Define a New Domain

You can launch QuickStart and the Configuration Wizard to define a new Oracle WebLogic domain.

To start the Configuration Wizard and define a new domain:

1. After installation, you can launch QuickStart (Graphical Interface Only) as follows:

   On Microsoft Windows systems: Select Start, Programs, Oracle WebLogic, QuickStart.

   On UNIX systems, do the following:

   a. Log in to the target UNIX system.

   b. Go to the /common/bin subdirectory of your installation.

      For example: cd /MW_HOME/wlserver_10.3/common/quickstart

c. Enter the command *sh quickstart.sh*

d. For console mode on UNIX, use the Oracle WebLogic Scripting Tool (WLST) to create a Domain.

See Oracle WebLogic Server Installation Guide, "Creating WebLogic Domains Offline," from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm

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Note. This PeopleSoft Mobile Inventory Management installation chapter only covers the graphical interface.

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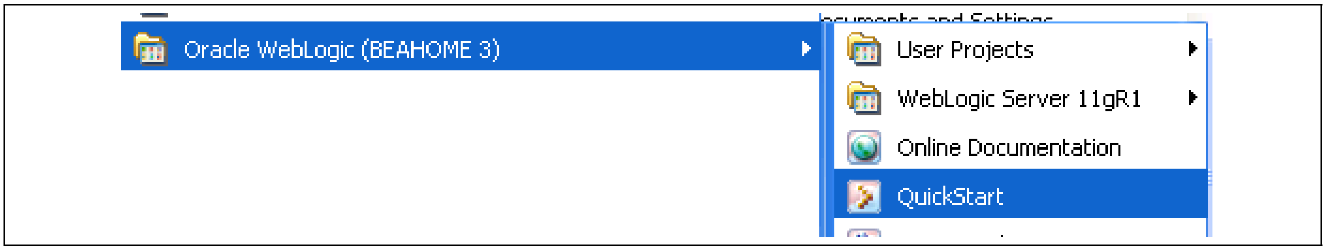
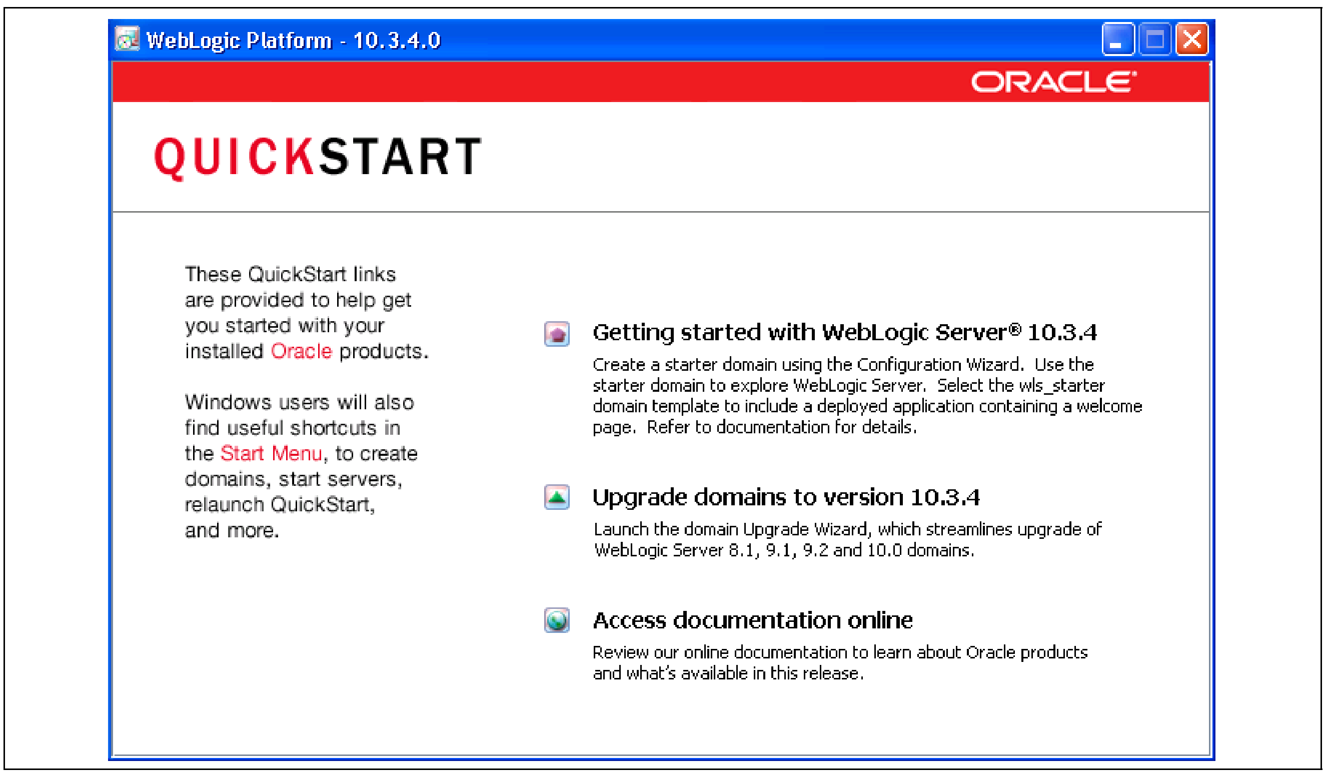
2. Use the menu options from the Program Group to select Oracle WebLogic, QuickStart, as shown in the following example:



Oracle WebLogic - Menu navigation from the Program Group to access QuickStart

The WebLogic Platform - QuickStart page appears, as shown in the following example:

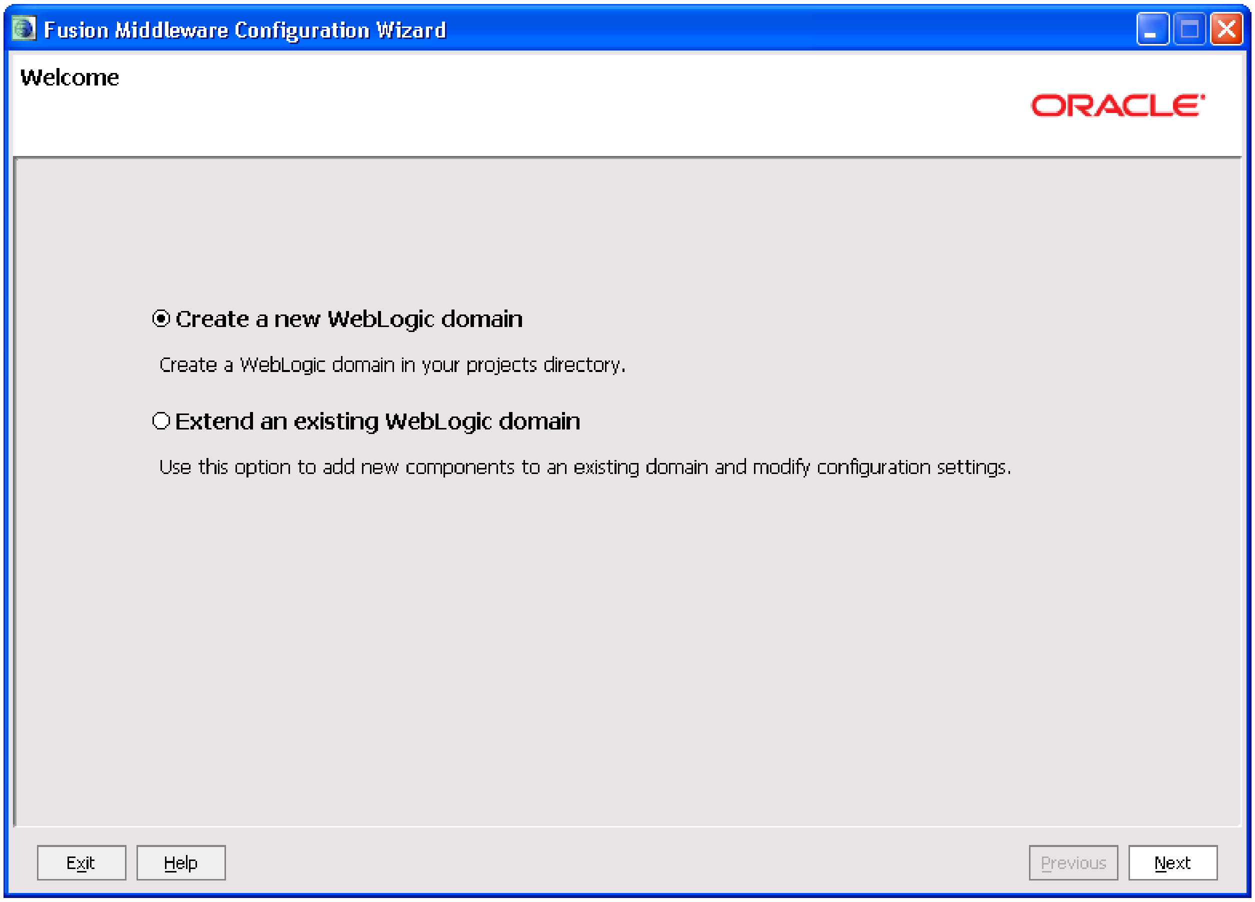


WebLogic Platform - QuickStart page

3. On the WebLogic QuickStart page, click the option *Getting Started with WebLogic Server 10.3.4* (or higher). This runs the QuickStart Configuration Wizard to define a New Domain, *database_domain*.

Note. If you plan to run multiple domains, you can use *database* as part of the name when you define your domain name.

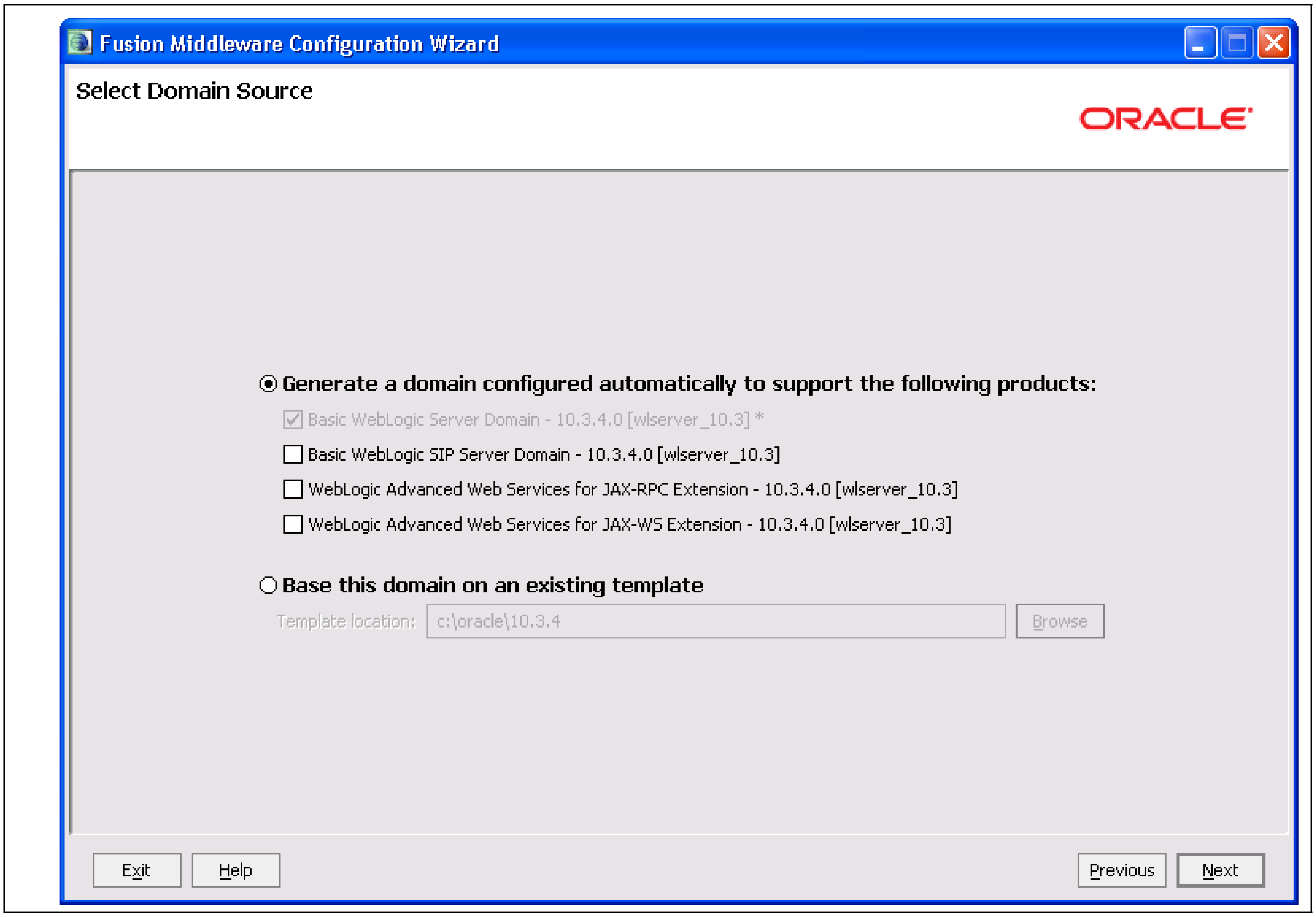
The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Welcome page

4. On the Welcome page, select the option *Create a new WebLogic domain.* Click Next.

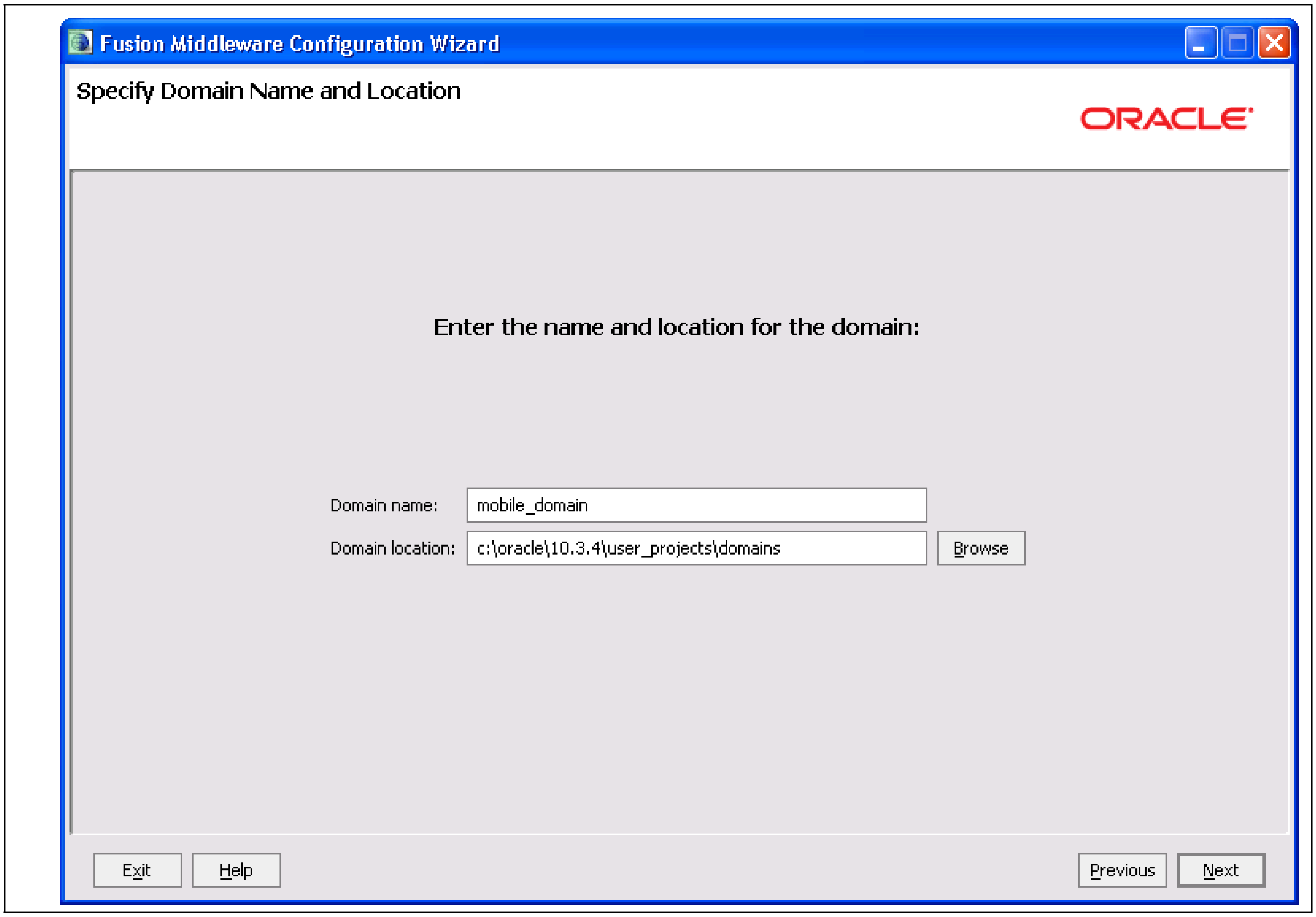
   The Fusion Middleware Configuration Wizard - Select Domain Source page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Domain Source page

5. On the Select Domain Source page, do the following:
   - Select the option *Generate a domain configured automatically to support the following products.*
   - Select the option *Basic WebLogic Server Domain 10.3.4 (wlserver_10.3)* (or higher).
6. Click Next.

   The Fusion Middleware Configuration Wizard - Specify Domain Name and Location page appears, as shown in the following example:

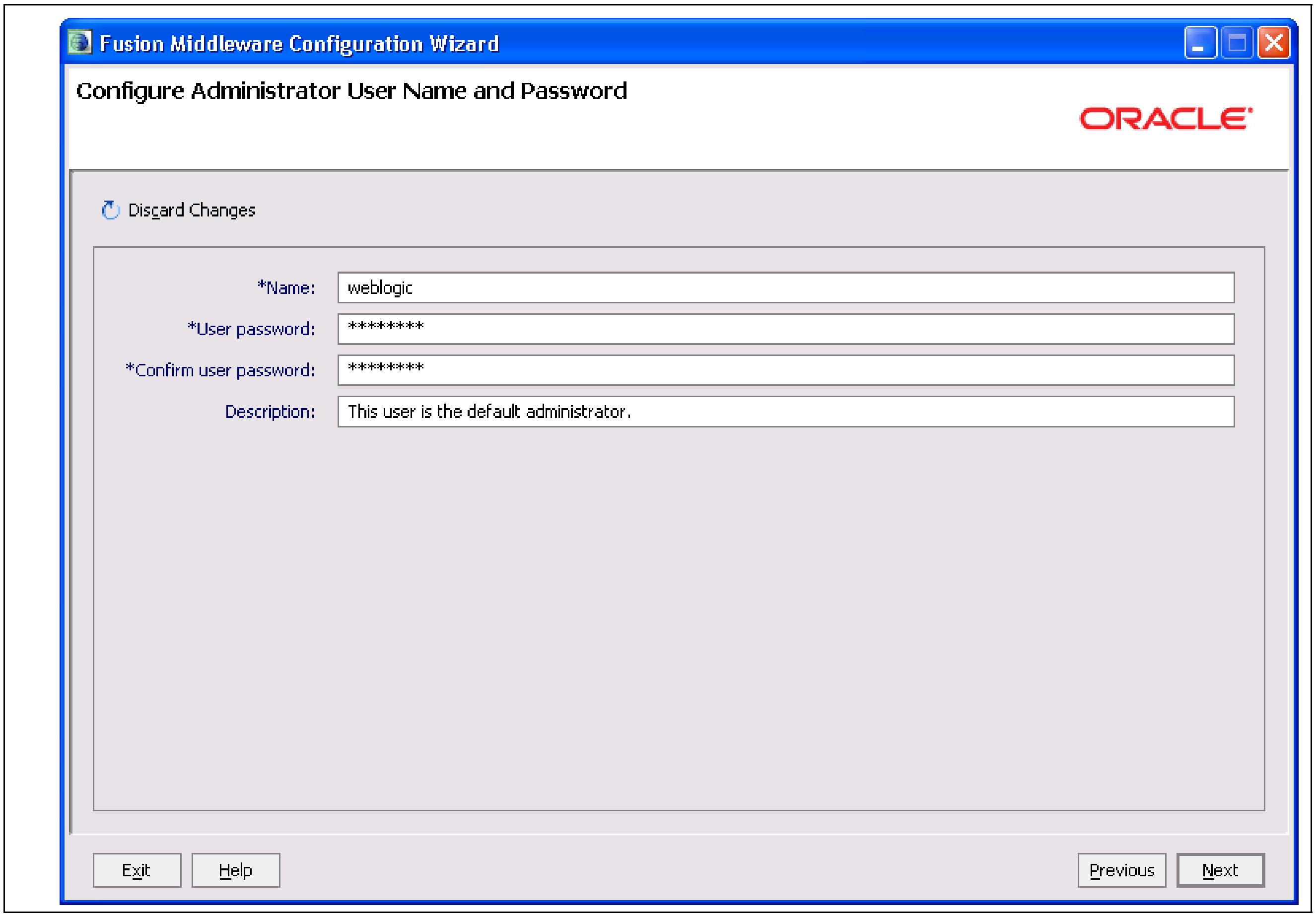


Fusion Middleware Configuration Wizard - Specify Domain Name and Location page

7. On the Specify Domain Name and Location page, change the default domain name and location to specify *your* domain name and location. Click Next.

Important! Be sure to make note of your domain name and location. This information is required in later steps.

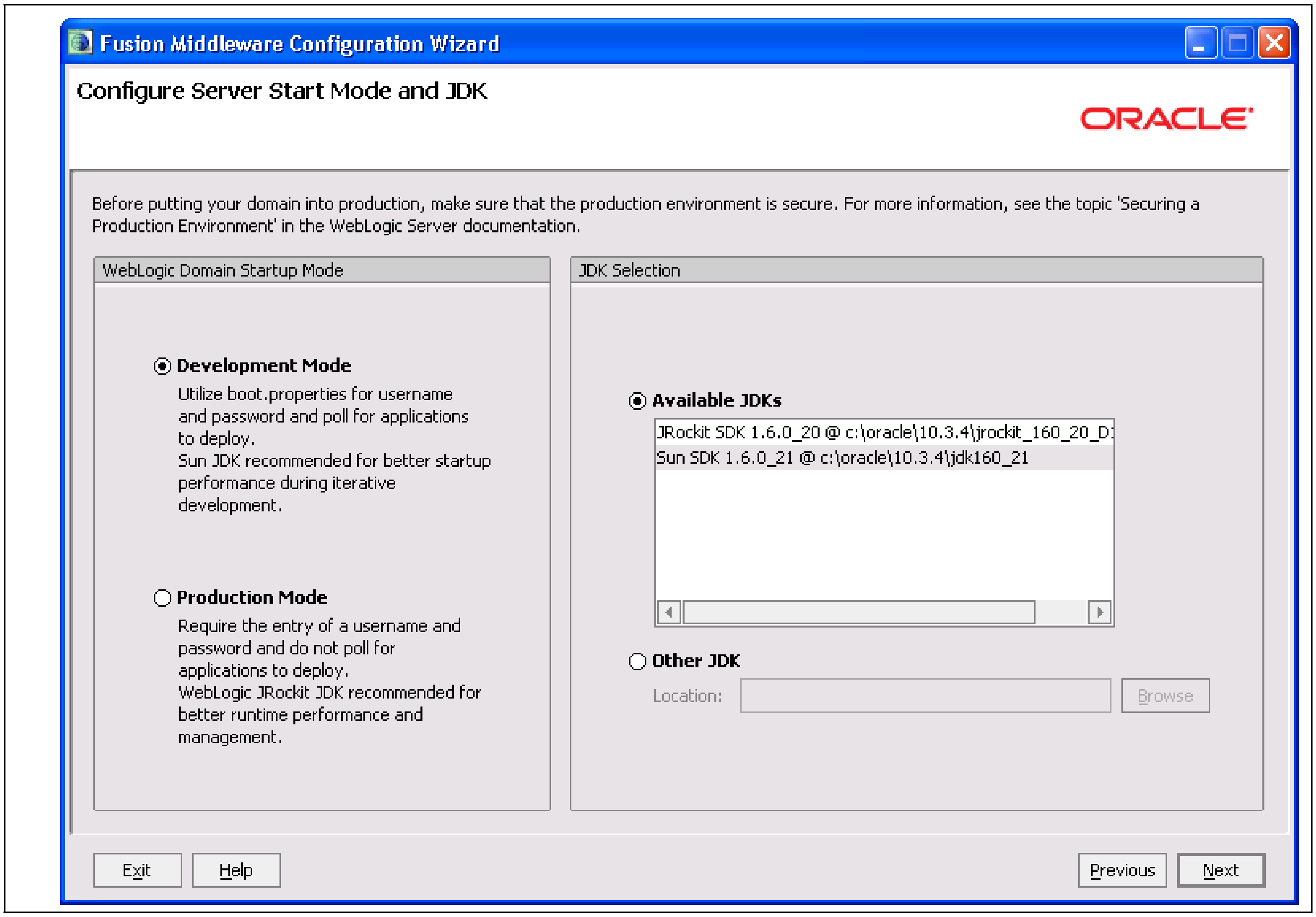
The Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page

8. On the Configure Administrator User Name and Password page, enter your user name and password. Click Next.

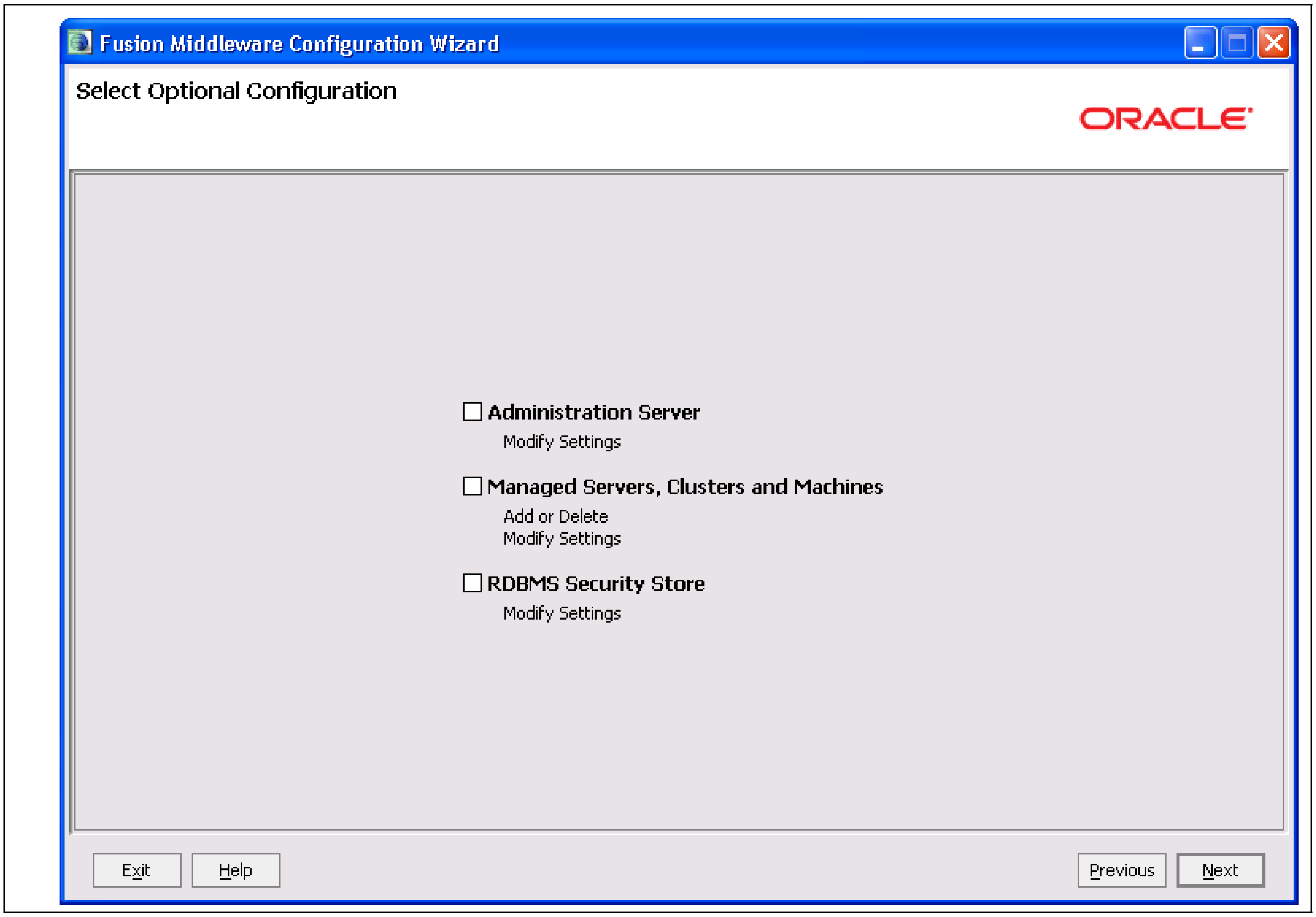
   The Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page

9. On the Configure Server Start Mode and JDK page, accept the default options *Development Mode* and *Available JDKs* and click Next.

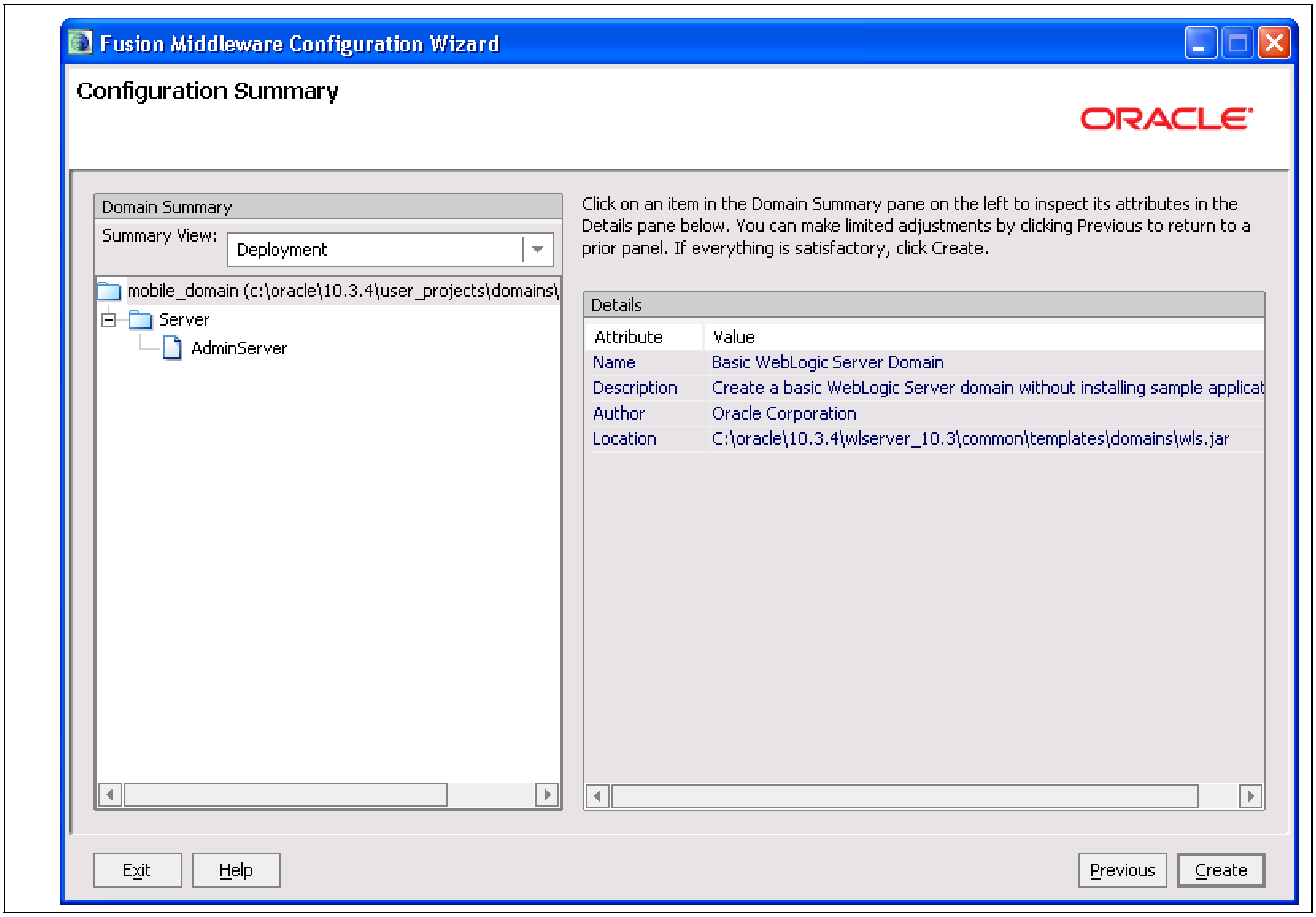
   The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

10. The Select Optional Configuration page requires no action. Click Next.

    Click Next until you reach the Fusion Middleware Configuration Wizard - Configuration Summary page, as shown in the following example:



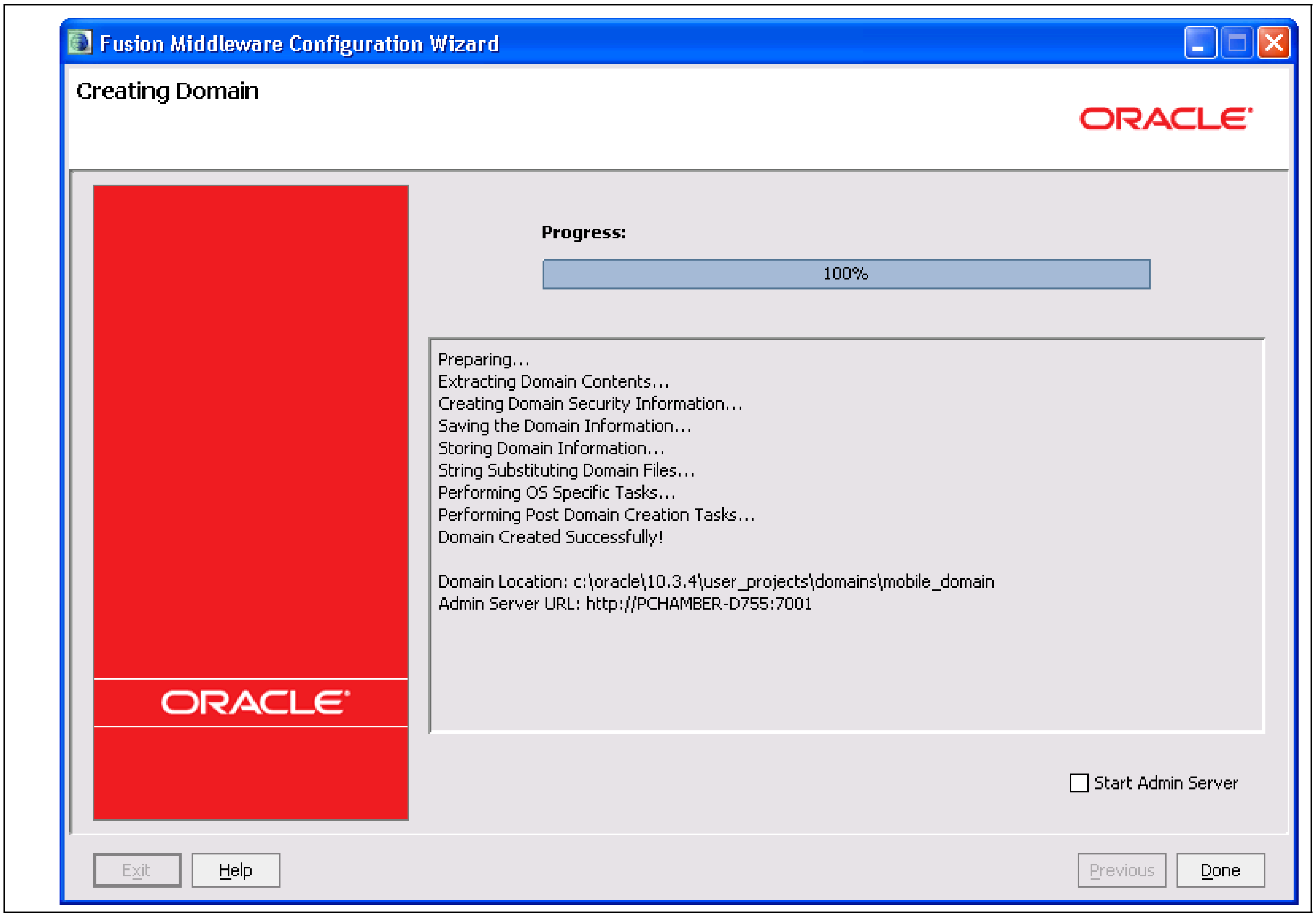
Fusion Middleware Configuration Wizard - Configuration Summary page

11. On the Configuration Summary page, click an item in the Domain Summary pane on the left to review your configuration details.

    If you need to make corrections, click the Previous button and modify your details.

12. After you confirm and adjust the configuration details, click the Create button.

    The Fusion Middleware Configuration Wizard - Creating Domain page appears showing the domain creation progress, as shown in the following example:



Fusion Middleware Configuration Wizard - Creating Domain progress page

13. On the Creating Domain progress page, when the domain creation progress reaches 100%, click the Done button.

Task 22-3: Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

This section discusses:

- Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Configuring Components Using the Configuration Wizard
- Starting the Administration Server

Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

This task discusses the Oracle Application Development Runtime Installer for use with PeopleSoft Mobile Inventory Management. You must configure and activate the Oracle WebLogic Server to pass data between PeopleSoft and the mobile devices. Refer to the earlier task *"Installing the Oracle WebLogic Server for Mobile."*

Note. Oracle Application Development Runtime Installer requires a graphical environment. To run the installation program in graphical mode, the console attached to the machine on which you are installing the software must support a Java-based GUI. All consoles for Microsoft Windows systems support Java-based GUIs, but not all consoles for UNIX systems do.

The system requires a Java-enabled web server to extend the PeopleSoft architecture to the internet and intranet. When you install the PeopleSoft Pure Internet Architecture on the web server, you install a collection of PeopleSoft Java servlets that handle a wide range of PeopleSoft transactions originating from the internet or intranet. PeopleSoft PeopleTools provides and supports the Oracle WebLogic Server for use within your PeopleSoft implementation.

Oracle WebLogic is a server software application that runs on a middle-tier between back-end databases (in this case, the PeopleSoft database) and related applications and browser-based thin clients (in this case, mobile devices). The Oracle WebLogic Server supports the Oracle Application Development Runtime and the Application Developer Mobile browser that extends Oracle Application Development Runtime to browsers running on mobile devices. The following steps detail a *general* installation of the Oracle Application Development Runtime for PeopleSoft Mobile Inventory Management.

Note. You only install the Oracle Application Development Runtime one time per Oracle WebLogic Server installation.

Task 22-3-1: Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

To install the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management:

Note. You can access the complete installation guide for the Oracle Application Developer 11.1.1.4 (or higher) from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm

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1. Download the Oracle Application Development Runtime Installer from the Oracle Technology Network.

   Access the Oracle Technology Network at *http://www.oracle.com/technetwork/index.html*, select Downloads, JDeveloper and ADF, and then in the "Oracle Application Development Runtime Installer" section (on that page) click the Download link.

   See "Accessing Installation Files"

2. Start the installer by going to the directory where you unpacked the archive file and switch to the Disk1 directory.

   - On UNIX operating systems:

     cd unpacked_archive_directory/Disk1 ./runInstaller -jreLoc JRE_LOCATION

- On Microsoft Windows operating systems:

  cd unpacked_archive_directory\Disk1 setup.exe -jreLoc JRE_LOCATION

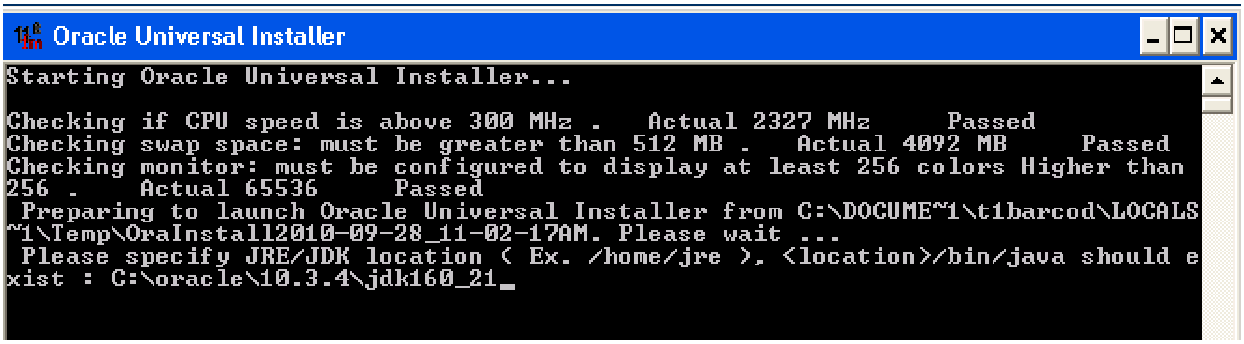
  This starts the Installation Wizard and the Oracle Universal Installer command window appears.

3. In the command window, enter your JDK directory (if you did not use -jreLoc parameter when launching the installer).

   For example: *c:\oracle\10.3.4\jdk160_21*

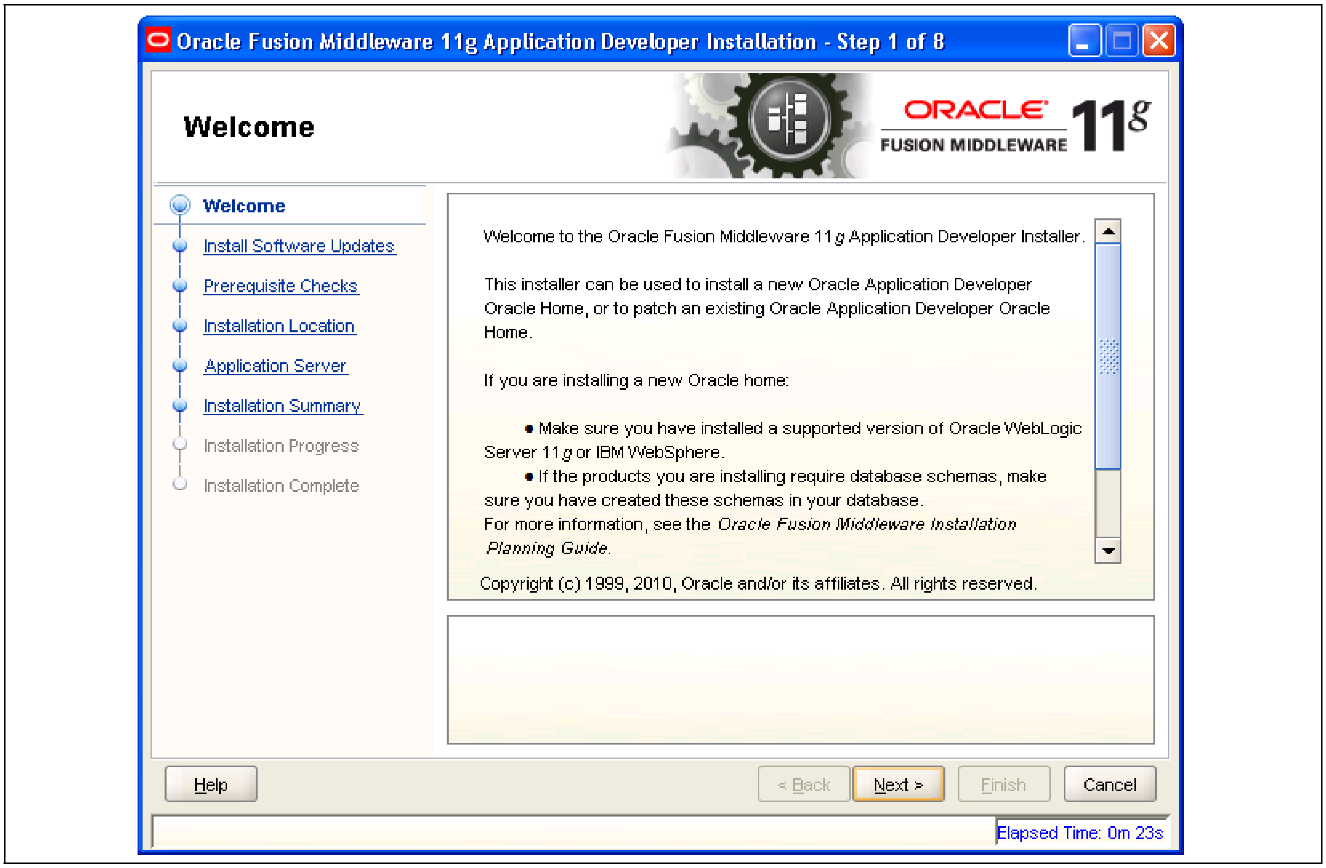
Note. If you are installing on a 64-bit server, you must download and install the appropriate 64-bit Java from www.java.com before you proceed with this installation. See the section titled *"Prerequisites"* at the beginning of this document.

The following example shows the Oracle Universal Installer command window with the JDK directory:



Oracle Universal Installer command window with JDK directory

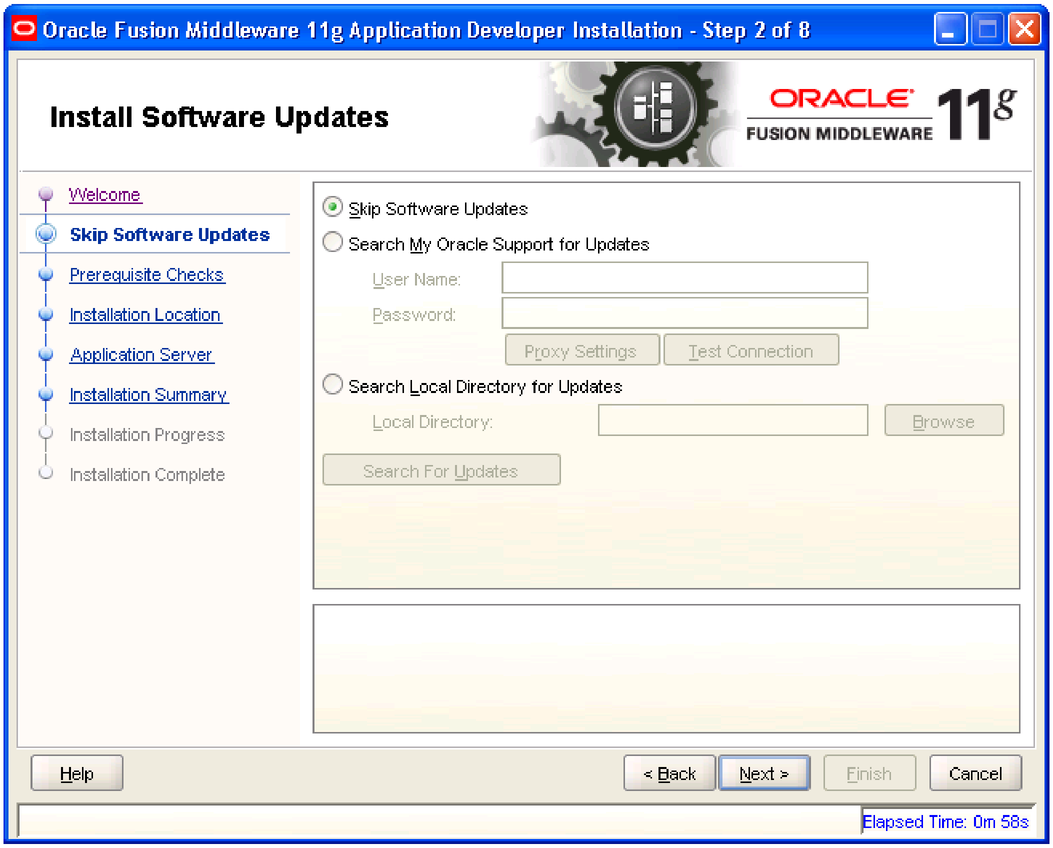
The Oracle Fusion Middleware 11g Application Developer Installation - Welcome page appears (Step 1 of 8), as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation - Welcome page (Step 1 of 8)

4. On the Welcome page, click Next.

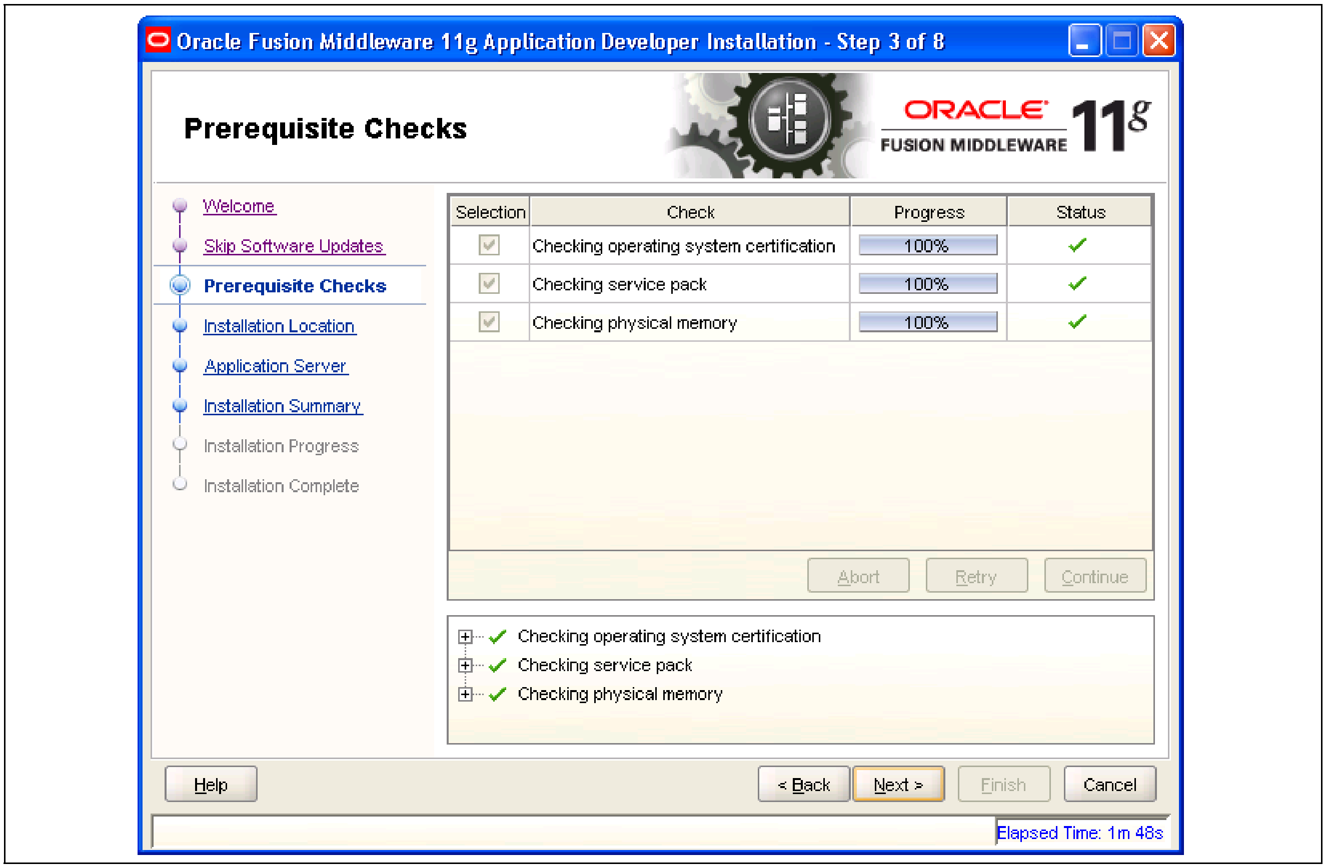
   The Oracle Fusion Middleware Application Developer Installation - Install Software Updates page (Step 2 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation - Install Software Updates page (Step 2 of 8)

5. On the Install Software Updates page, select the option *Skip Software Updates*. Click Next.

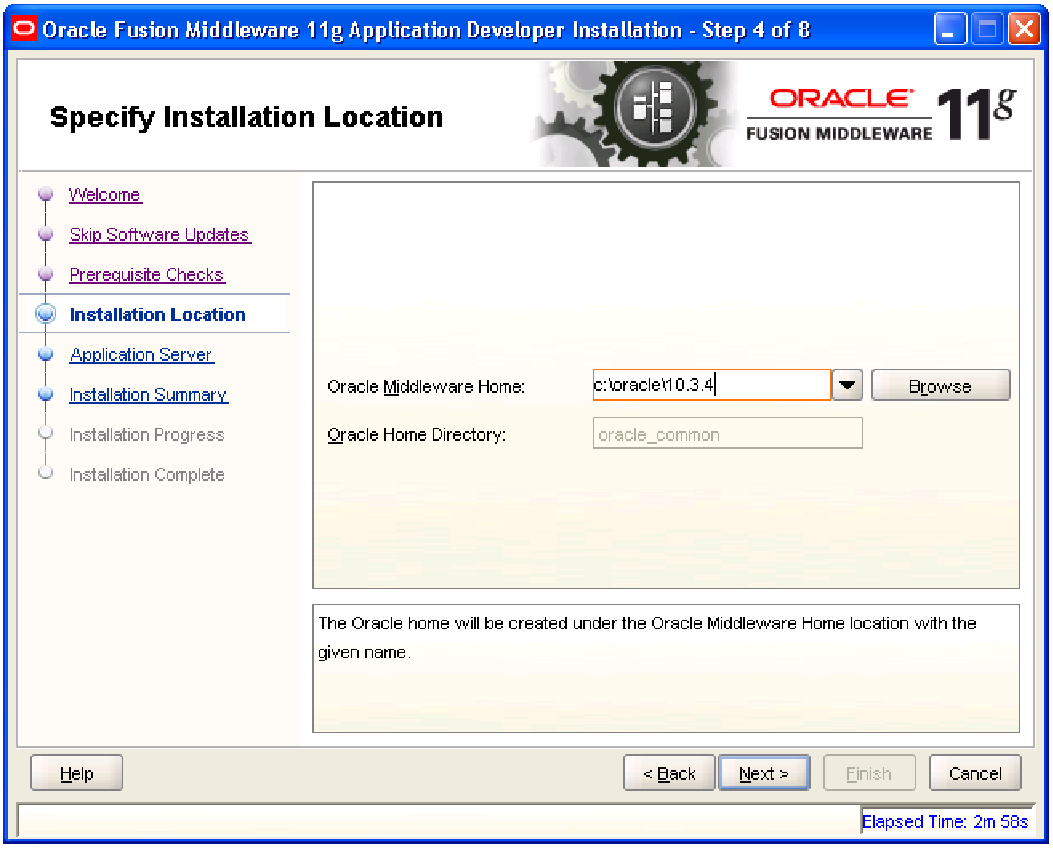
   The Oracle Fusion Middleware Application Developer Installation - Prerequisite Checks page (Step 3 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation - Prerequisite Checks page (Step 3 of 8)

6. On the Prerequisite Checks page, click Next.

   The Oracle Fusion Middleware Application Developer Installation - Specify Installation Location page (Step 4 of 8) appears, as shown in the following example:



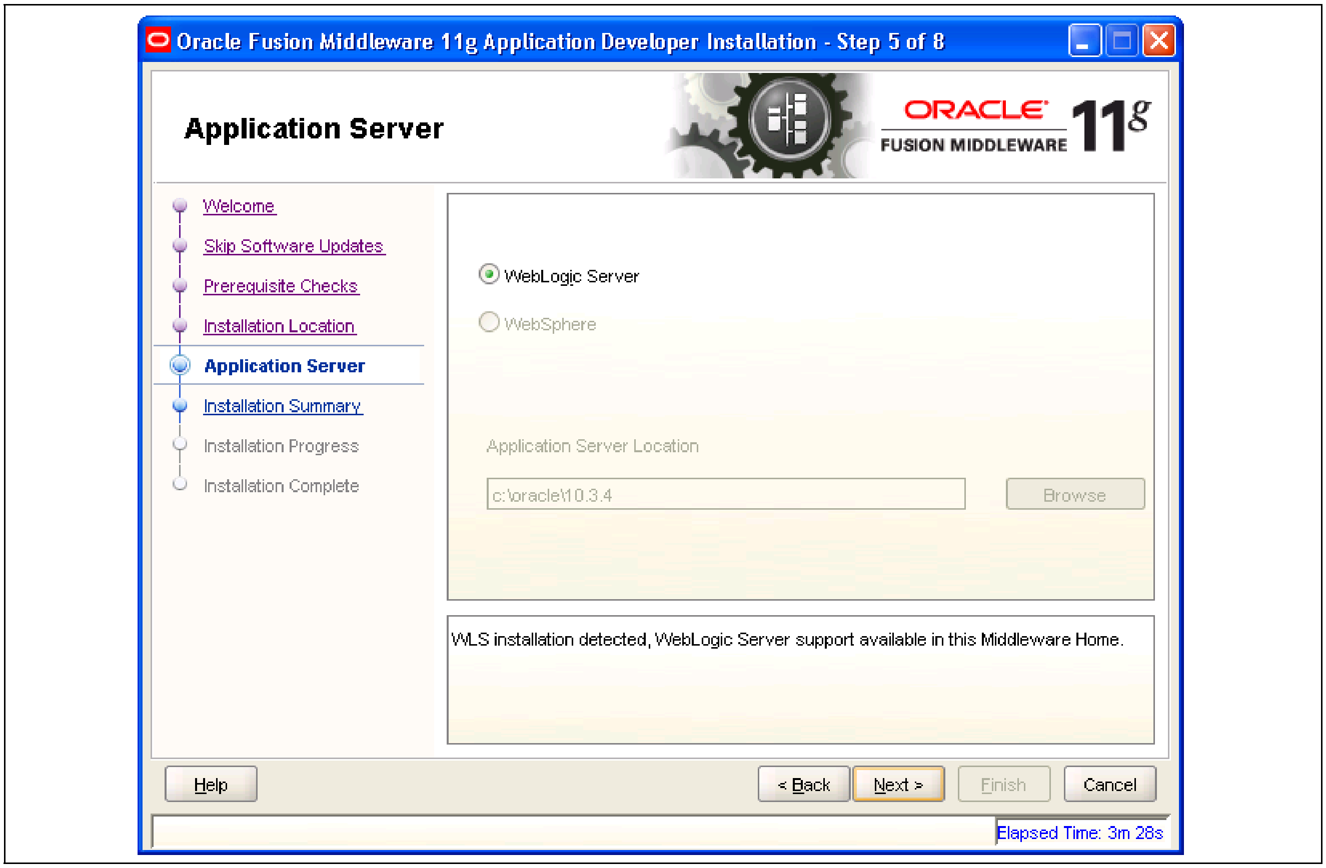
Oracle Fusion Middleware 11g Application Developer Installation - Specify Installation Location page (Step 4 of 8)

7. On the Specify Installation Location page, in the Oracle Middleware Home field, enter your Middleware Home location where the Oracle WebLogic Server is installed.

   For example: *c:\oracle\WLS10.3.4*

8. Click Next.

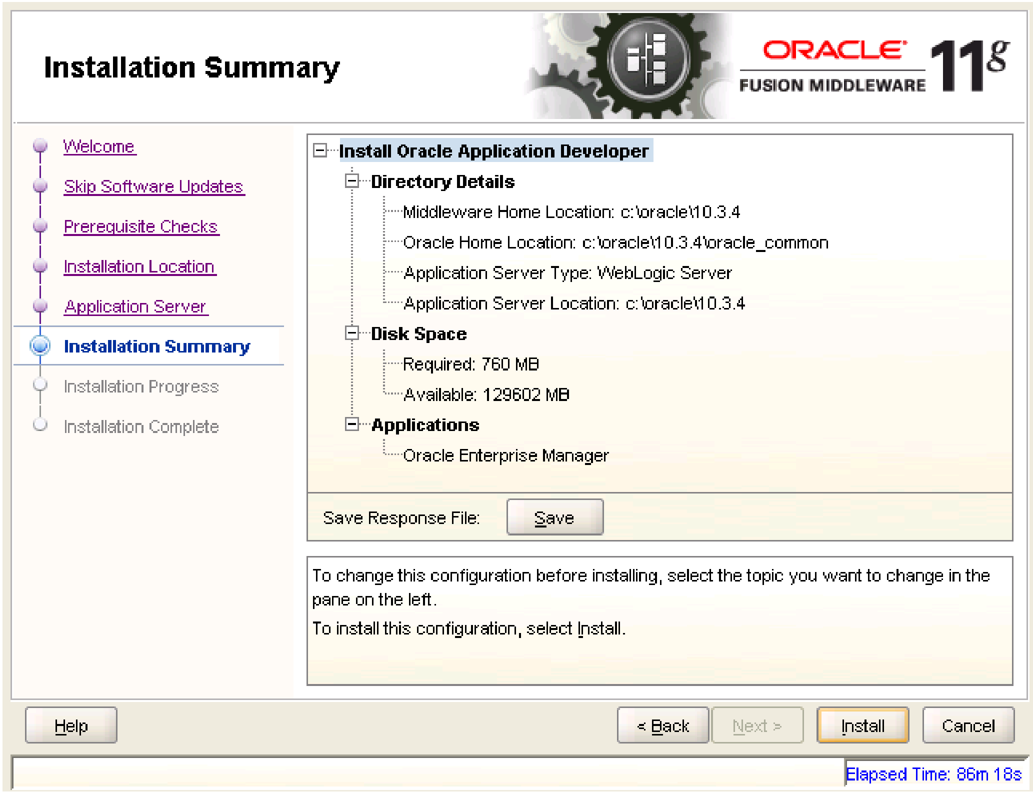
   The Oracle Fusion Middleware Application Developer Installation - Application Server page (Step 5 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation - Application Server page (Step 5 of 8)

9. On the Application Server page, accept the defaults and click Next.

   The Oracle Fusion Middleware Application Developer Installation - Installation Summary page (Step 6 of 8) appears, as shown in the following example:

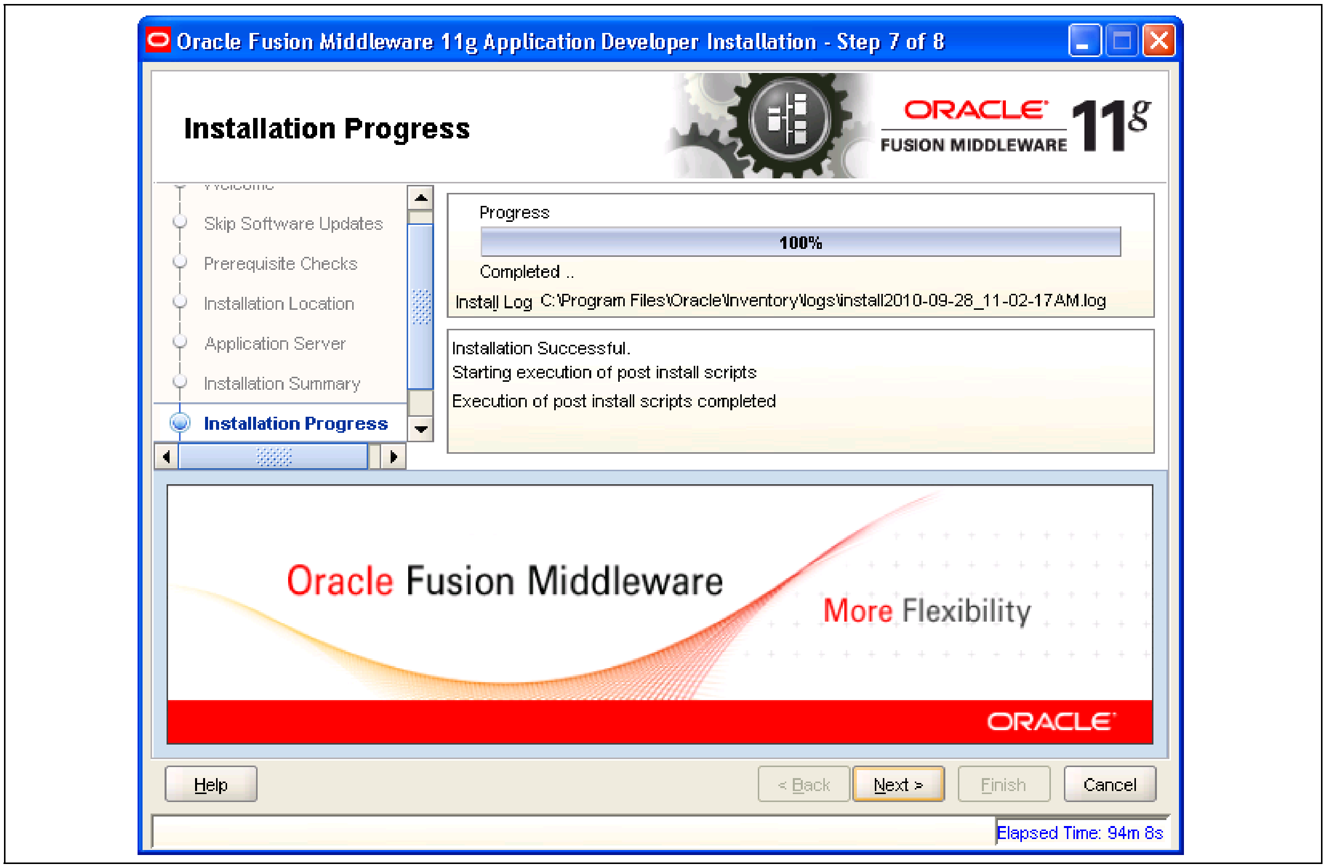


Oracle Fusion Middleware 11g Application Developer Installation - Installation Summary page (Step 6 of 8)

10. On the Installation Summary page, review your installation details and then click the Install button.

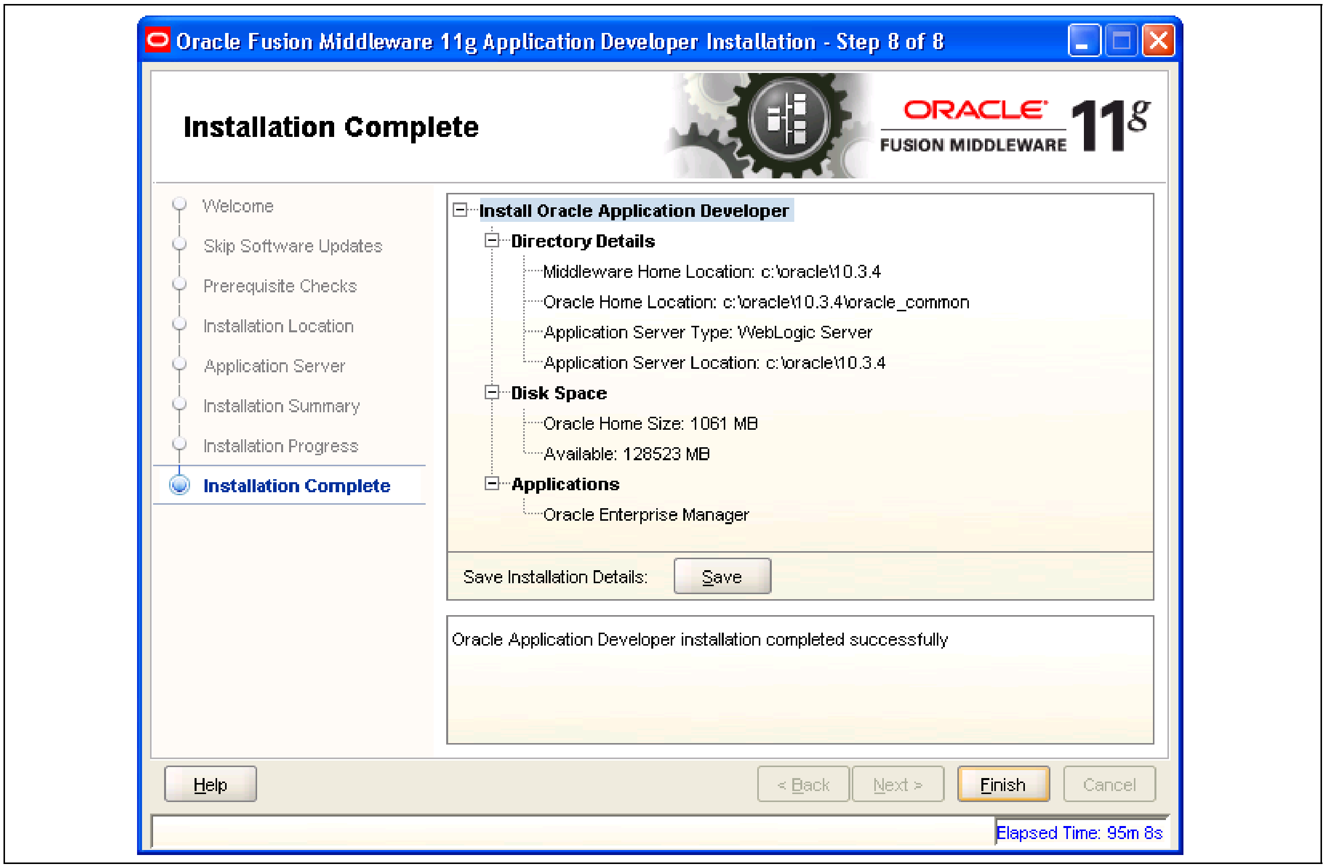
    If you need to make a correction, click the Back button and modify your details.

    The Oracle Fusion Middleware Application Developer Installation - Installation Progress page (Step 7 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation - Installation Progress page (Step 7 of 8)

11. When the installation progress reaches 100%, click the Next button.
12. Click Next until the Oracle Fusion Middleware Application Developer Installation - Installation Complete page (Step 8 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation - Installation Complete page (Step 8 of 8)

13. On the Installation Complete page, click Finish.

Task 22-3-2: Configuring Components Using the Configuration Wizard

After the installation is complete, you can configure the components using the Fusion Middleware Configuration Wizard. The Configuration Wizard is located in the common/bin directory inside the product Oracle home.

To configure the components using the Fusion Middleware Configuration Wizard:

1. Start the Configuration Wizard by navigating to the directory as follows:

   On UNIX operating systems:

   cd MW_HOME/oracle_common/common/bin

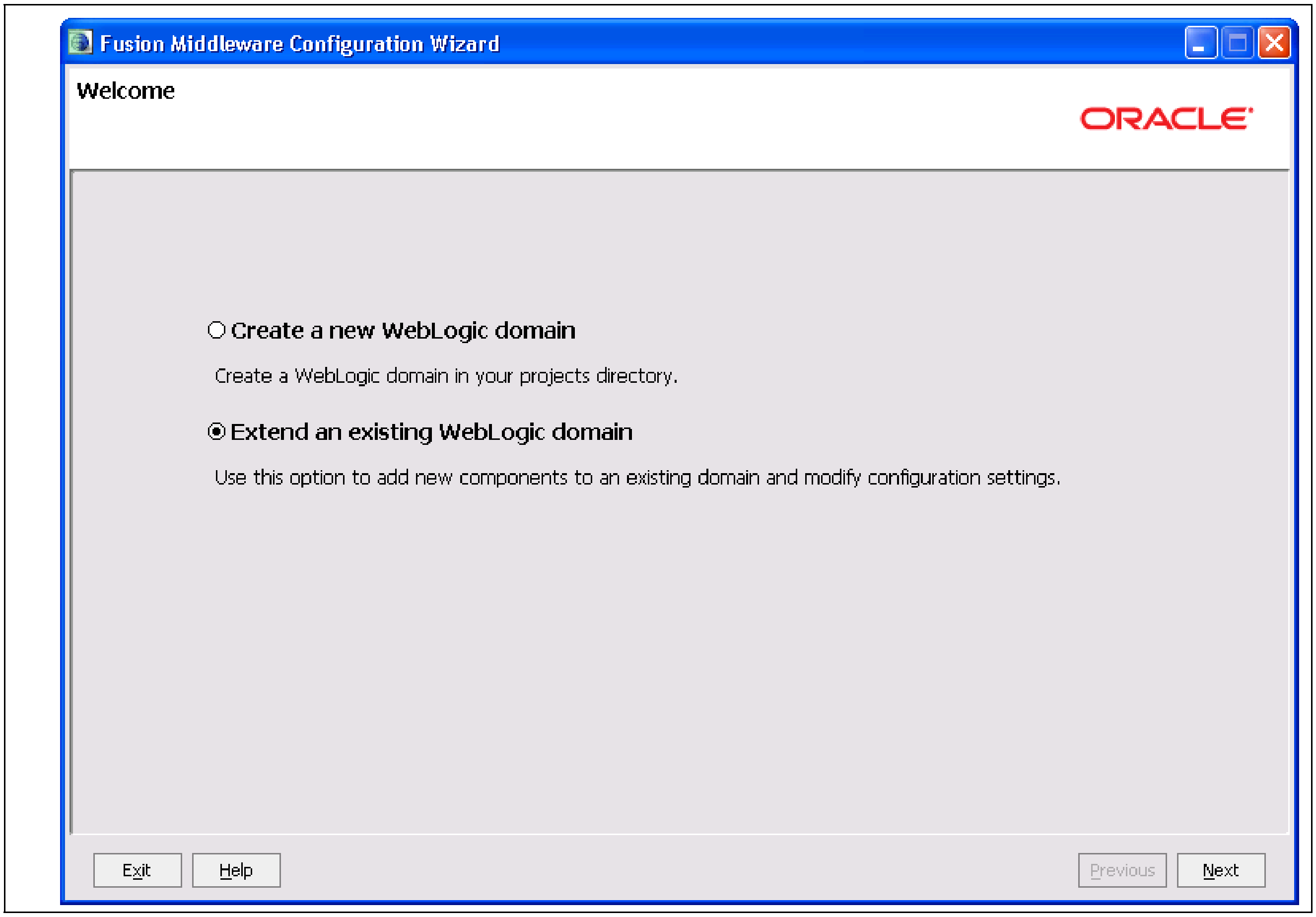
   . *config.sh*

   On Microsoft Windows operating systems:

   cd MW_HOME\oracle_common\common\bin

   config.cmd

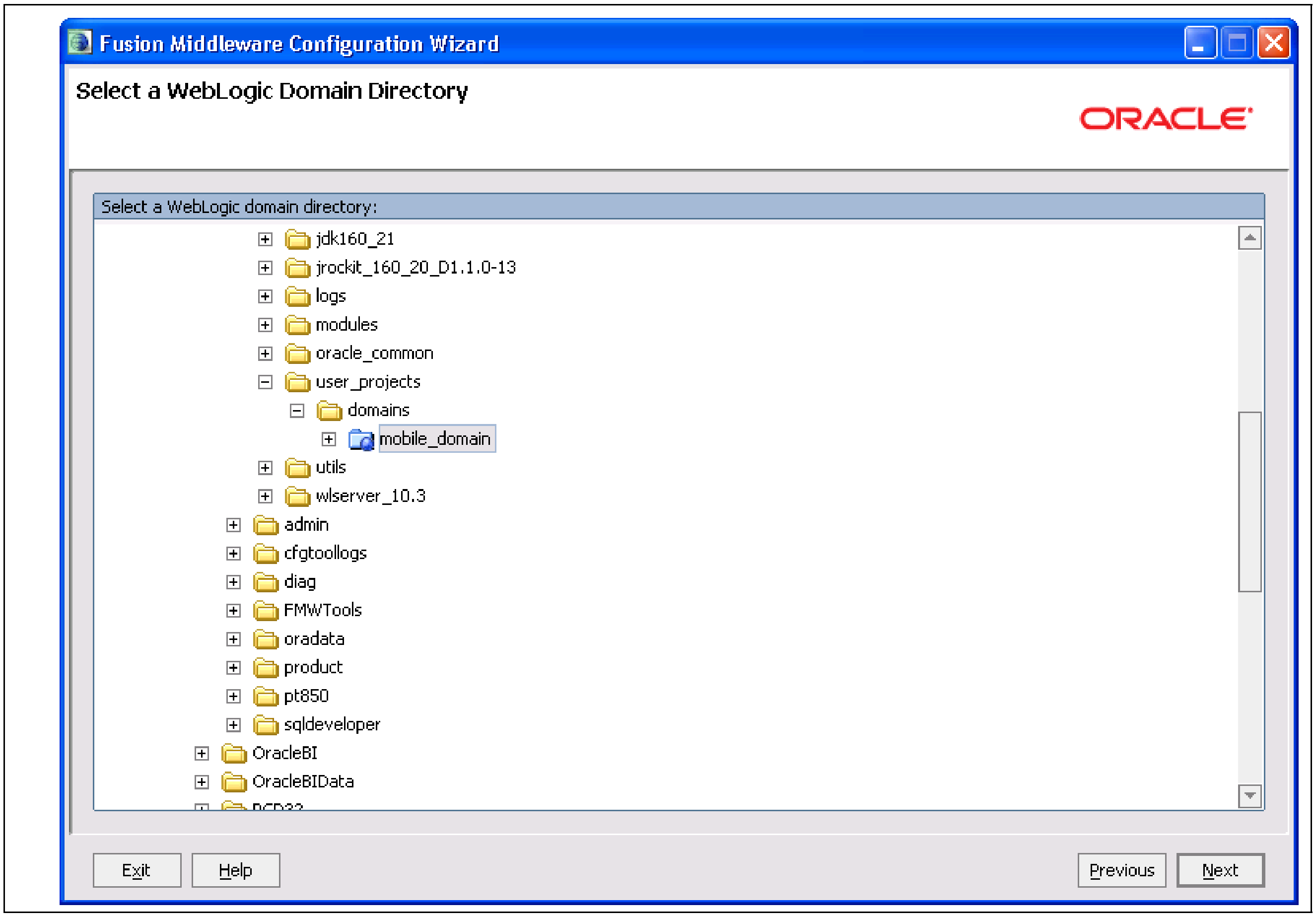
   The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Welcome page

2. On the Welcome page, select the option *Extend an existing WebLogic domain* and Click Next.

   The Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page appears, as shown in the following example:



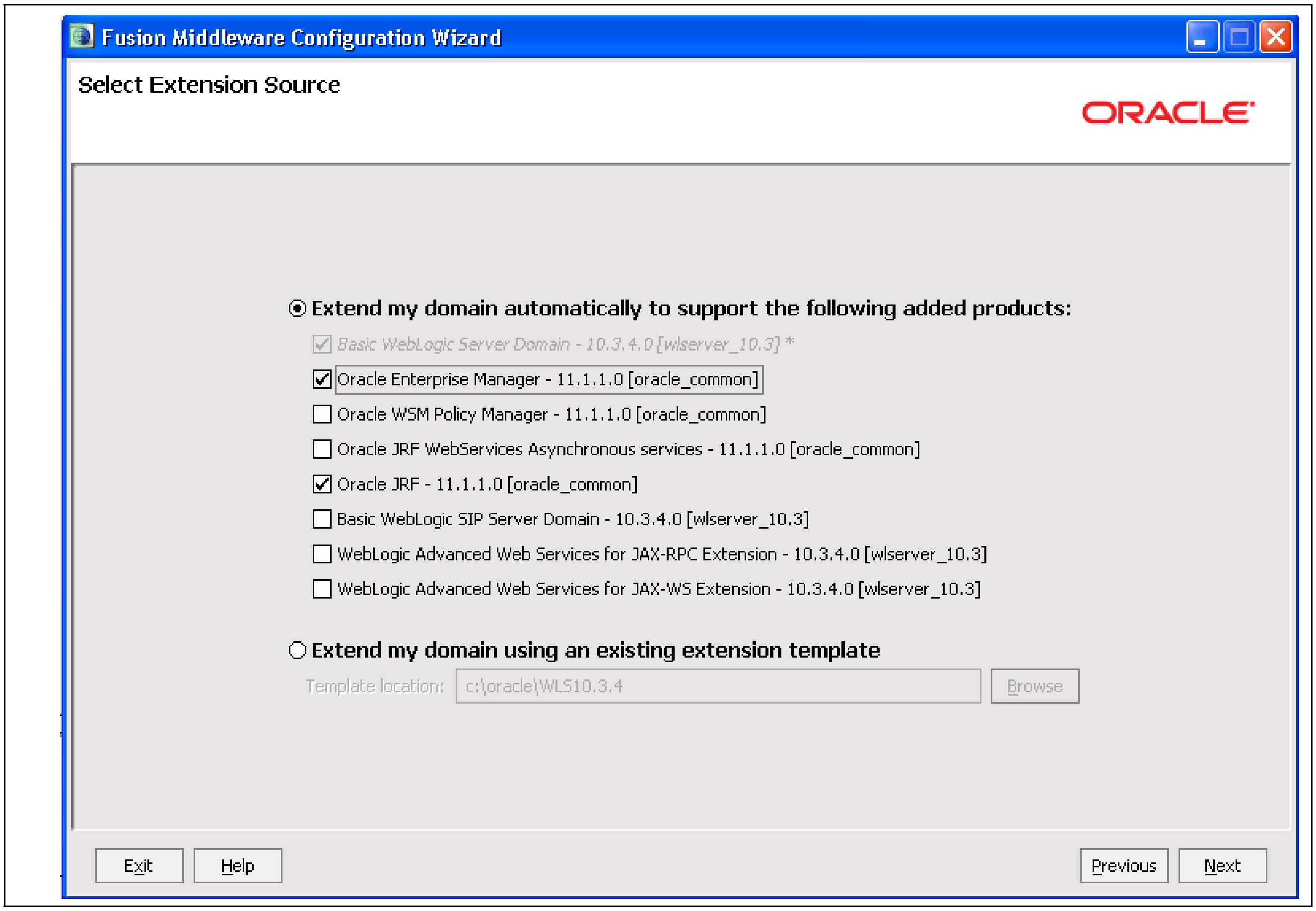
Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page

3. On the Select a WebLogic Domain Directory page, select your Target Domain.

   For example: *Mobile_Domain*

4. Click Next.

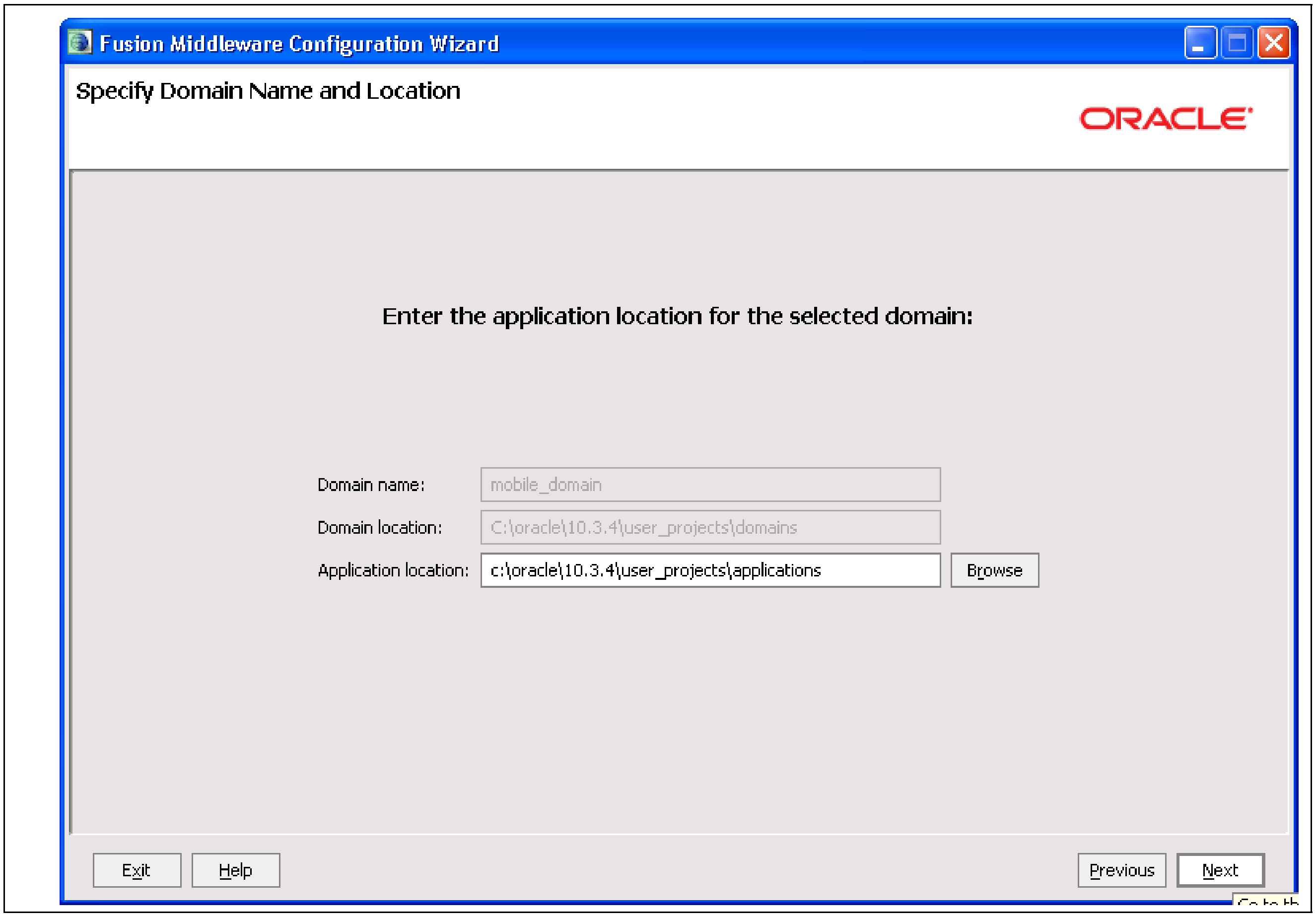
   The Fusion Middleware Configuration Wizard - Select Extension Source page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Extension Source page

5. On the Select Extension Source page, do the following:
   - Select the option *Extend my domain automatically to support the following added products.*
   - Select the *Oracle Enterprise Manager – 11.1.1.0 [oracle_common]* check box.
   - Select the *Oracle JRF – 11.1.1.0 [oracle_common]* check box.
6. Click Next.

   The Fusion Middleware Configuration Wizard - Specify Domain Name and Location page appears, as shown in the following example:

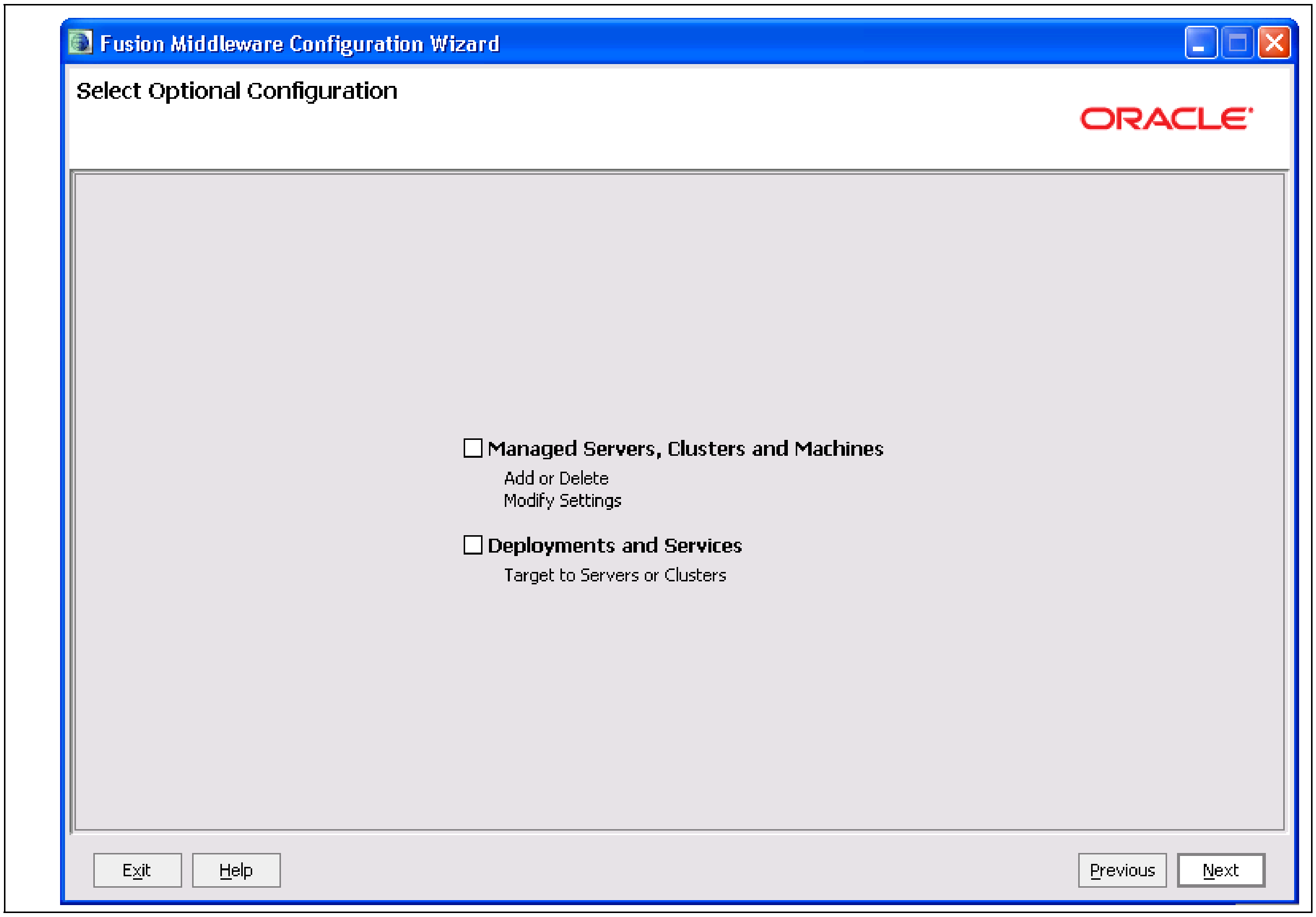


Fusion Middleware Configuration Wizard - Specify Domain Name and Location page

7. On the Specify Domain Name and Location page, click Next.

   In an earlier step you specified the domain name and the location that now populate these fields.

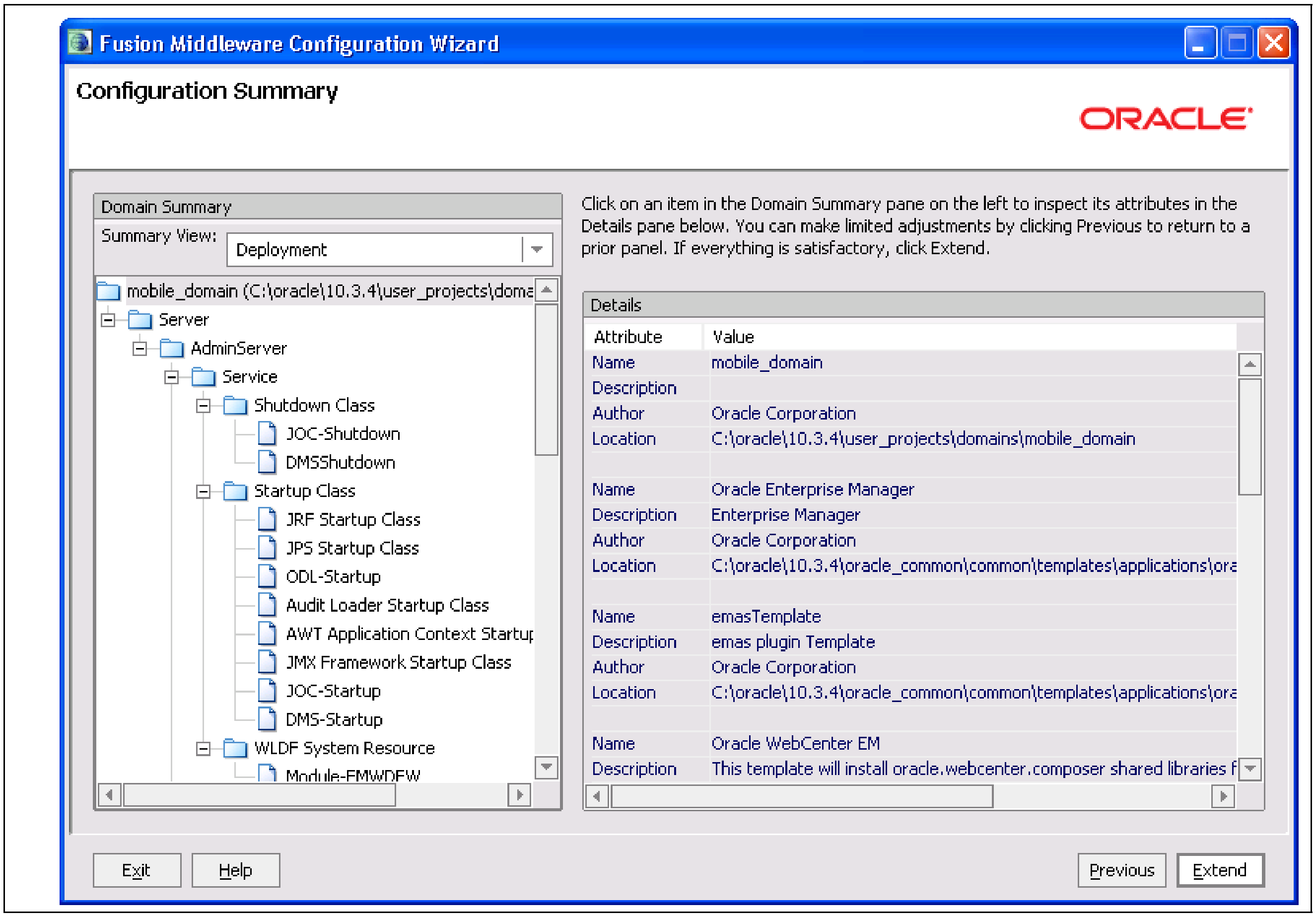
   The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

8. The Select Optional Configuration page requires no action. Click Next.

   The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:

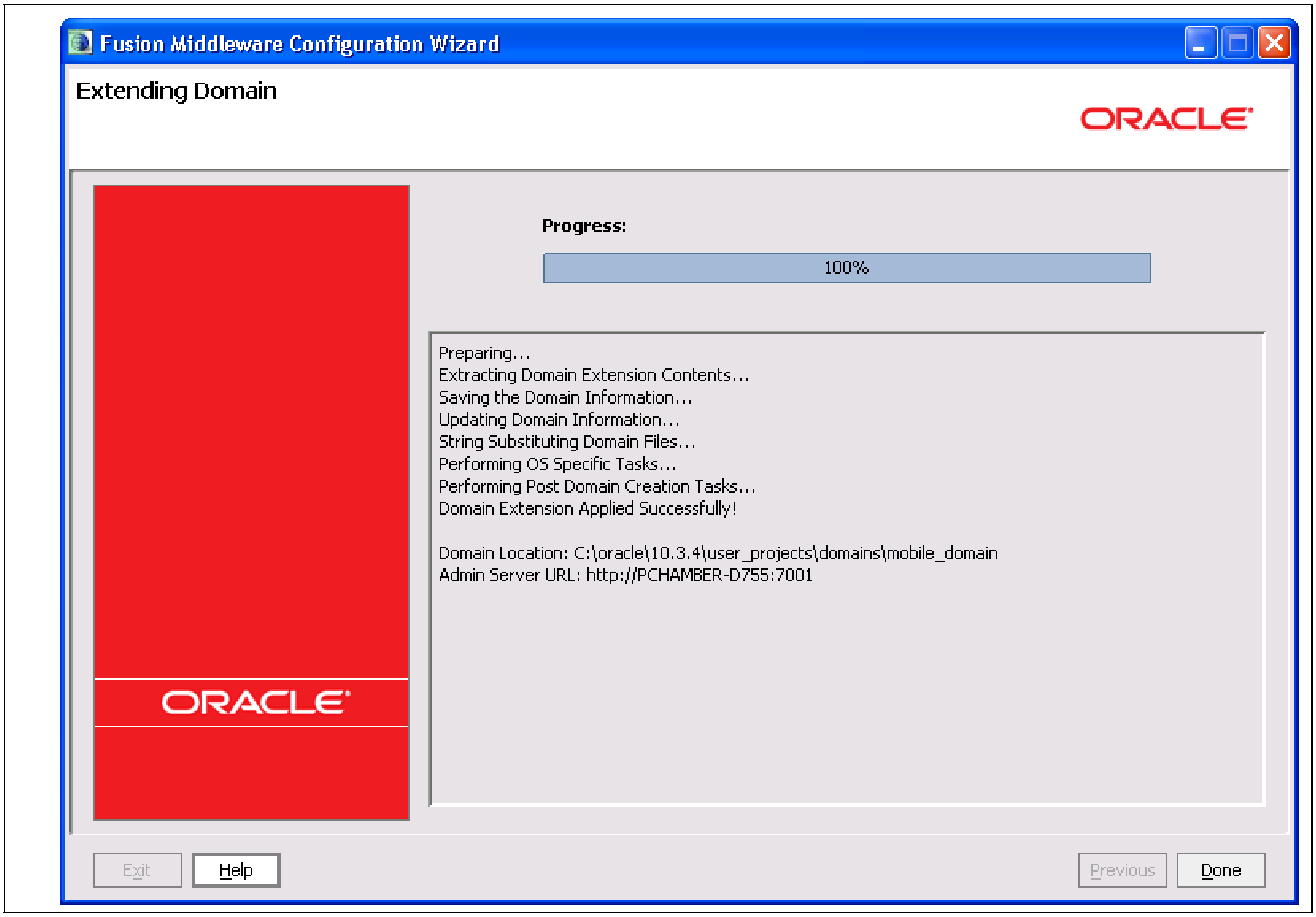


Fusion Middleware Configuration Wizard - Configuration Summary page

9. On the Configuration Summary page, review your configuration details, and then click the Extend button.

   If you need to make corrections, click the Previous button to go back and modify your details.

   The Fusion Middleware Configuration Wizard - Extending Domain page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Extending Domain page

10. On the Extending Domain page, click the Done button.

Note. You can create additional domains by following the same steps in the task "Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Managementt," except on the Welcome page you select the option *Create a new WebLogic domain*, instead of Extend a WebLogic domain (do this for each additional domain). Select the same options.

Task 22-3-3: Starting the Administration Server

To get your deployments up and running, you must start the Administration Server. You can do this by running the startWebLogic.sh script (on UNIX operating systems) or the startWebLogic.cmd script (on Microsoft Windows operating systems) in the directory where you created your new domain.

To start the Administration Server, navigate to and run the appropriate script as follows:

- On UNIX systems:

  DOMAIN_HOME/startWebLogic.sh

- On Microsoft Windows systems:

  DOMAIN_HOME\startWebLogic.cmd

You entered the domain name and location on the Specify Domain Name and Location Screen in the Configuration Wizard.

Task 22-4: Applying the PeopleSoft Mobile Inventory Management Authentication Provider

This section discusses:

- Prerequisites
- Applying the PeopleSoft Mobile Inventory Management Authentication Provider

The PeopleSoft Authentication Provider authenticates a user name and password by connecting to a PeopleSoft Application Server. With successful authentication, the system creates a Principal and Subject, identifying the authorized use of a secure web server session. The system can use this subject to run a secure web session and provide WS-Security parameters for subsequent calls to the PeopleSoft system.

Prerequisites

Before you begin, verify that you meet the following requirements:

- Access to the *wlPSFTSecurityProviders.jar* file.

  The file location is in <PS_APP_HOME>\setup\oracle\adf\MobileInventory.

- Access to the *psjoa.jar* file.

  Oracle delivers the psjoa.jar file as part of PeopleSoft PeopleTools. This file must come from the version of PeopleTools that is running your application server.

  For Microsoft Windows installations, this file is in the <PS_HOME>\web\psjoa\ subdirectory.

  For UNIX installations, this file is in the <PS_HOME>\appserv\classes\ subdirectory.

Task 22-4-1: Applying the PeopleSoft Mobile Inventory Management Authentication Provider

Understanding Applying the PeopleSoft Mobile Inventory Management Authentication Provider

To apply the PeopleSoft Mobile Inventory Management Authentication Provider, you must perform the following steps, specific to Microsoft Windows or UNIX, to copy the necessary *.jar* files and then add the authentication provider to the security realm.

Copying the wlPSFTSecurityProviders.jar File

The *PSFTSecurityProviders.jar* file is a Managed Bean (Mbean). These Mbeans contain meta information that the Oracle WebLogic Server understands. All Mbeans that Oracle WebLogic uses are in the *%WL_HOME%\server\lib\mbeantypes* directory.

Note. The *%WL_HOME%* referred to here is <installation directory>+wlserver_10.3 directory, *not* the parent installation directory <installation directory>.

For example, c:\bea1034\wlserver_10.3

For Microsoft Windows:

Copy *wlPSFTSecurityProviders.jar* to %WL_HOME%\server\lib\mbeantypes

For UNIX:

Copy *wlPSFTSecurityProviders.jar* to *${WL_HOME}/server/lib/mbeantypes*

Copying the PeopleSoft psjoa.jar File

The PeopleSoft PeopleTools library file *psjoa.jar* must be accessible to the mobile application that is running on the Oracle WebLogic Server. The file *psjoa* is release dependent and *must* be the same PeopleSoft PeopleTools release as the version that you are running on the application server.

You must copy this jar file from your PS_HOME to the Mobile Inventory Oracle WebLogic Server and place it in the *WL_HOME\server\lib\PeopleSoft* directory.

Important! Each time you apply maintenance, you must also replace the *psjoa.jar* file. For example, if the PeopleSoft PeopleTools release changes from 8.52.02 to 8.52.03, you must copy a new version of the *psjoa.jar* file to the Oracle WebLogic Server.

To copy the PeopleSoft *psjoa.jar* file to the %WL_HOME%\server\lib\PeopleSoft\ directory, perform the following steps specific to Microsoft Windows or UNIX:

1. Copy the psjoa.jar file to the *WL_HOME\server\lib\PeopleSoft* directory:

   For Microsoft Windows:

   - Access your Mobile Inventory Oracle WebLogic Server.
   - Create a PeopleSoft directory under %WL_HOME%\server\lib\
   - Copy the psjoa.jar file from your*PS_HOME\web\psjoa* to *%WL_HOME%\server\lib\PeopleSoft*

     For UNIX:

     (PS_HOME should be from a UNIX PeopleTools install)

   - Access your Oracle WebLogic Server for Mobile Inventory.
   - Create a PeopleSoft directory under %WL_HOME%/server/lib
   - Copy the psjoa.jar file from your *PS_HOME/appserv/classes* to *${WL_HOME}/server/lib/PeopleSoft/*

2. Update the Weblogic classpath. This can be done for the *entire* Weblogic install or for the *specific* Domain where PeopleSoft Mobile Inventory is installed. For Microsoft Windows, you update the file ending in *.cmd*, for UNIX you update the file ending in *.sh*.

   For Microsoft Windows, update the file ending in *.cmd*:

   - *Entire Weblogic:* Update the file *%WL_HOME%\common\bin\commEnv.cmd* and prepend the following to the WEBLOGIC_CLASSPATH environment variable.

     ```
     %WL_HOME%\server\lib\PeopleSoft\psjoa.jar;
     ```

   - *Specific Domain:* Update the file *domain_path\bin\setDomainEnv.cmd* and prepend the preceding to the PRE_CLASSPATH environment variable.

     The psjoa.jar file must be a fully qualified path.

     Note. If there is no PRE_CLASSPATH variable, add it to the file.

     For example, set PRE_CLASSPATH=%WL_HOME%\server\lib\PeopleSoft\psjoa.jar

     ---

     For UNIX, update the file ending in *.sh*:

- *Entire Weblogic:* Update the file *%WL_HOME%/common/bin/commEnv.sh* and prepend the following to the WEBLOGIC_CLASSPATH environment variable.

  `${WL_HOME}/server/lib/PeopleSoft/psjoa.jar$`*{CLASSPATHSEP}*

Important! For UNIX installations, be sure to update the file that ends in *.sh* and ensure that you prepend the WEBLOGIC CLASSPATH environment variable, {CLASSPATHSEP}, as shown in the preceding example. Failure to do so will result in login failure when accessing the PeopleSoft system.

- *Specific Domain:* Update the file *domain_path/bin/setDomainEnv.sh* and prepend the preceding to the PRE_CLASSPATH environment variable.

3. Restart your Oracle WebLogic Server and domain to ensure that your changes take affect.

Adding the PeopleSoft Authentication Provider to the Active SecurityRealm

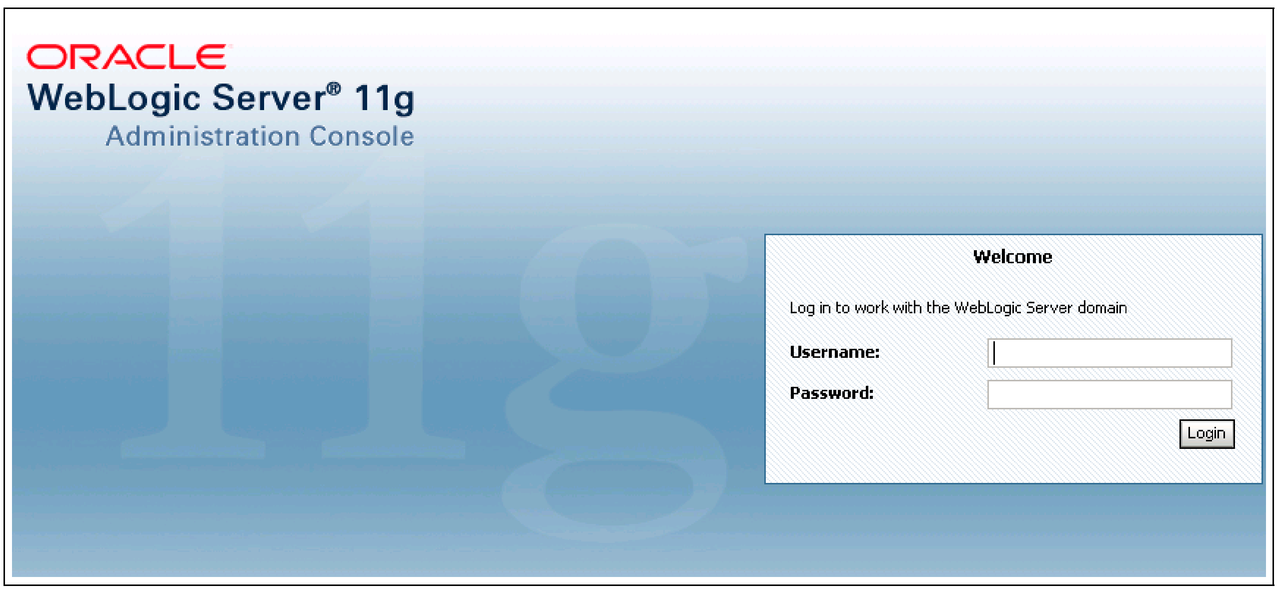
To add the PeopleSoft Authentication Provider to the active Security Realm:

1. Log in to the Oracle WebLogic Server Administration Console.

   a. In the browser instance, enter the location of the local host to start the Administration Console.

      For example: *http://localhost:7001/console*

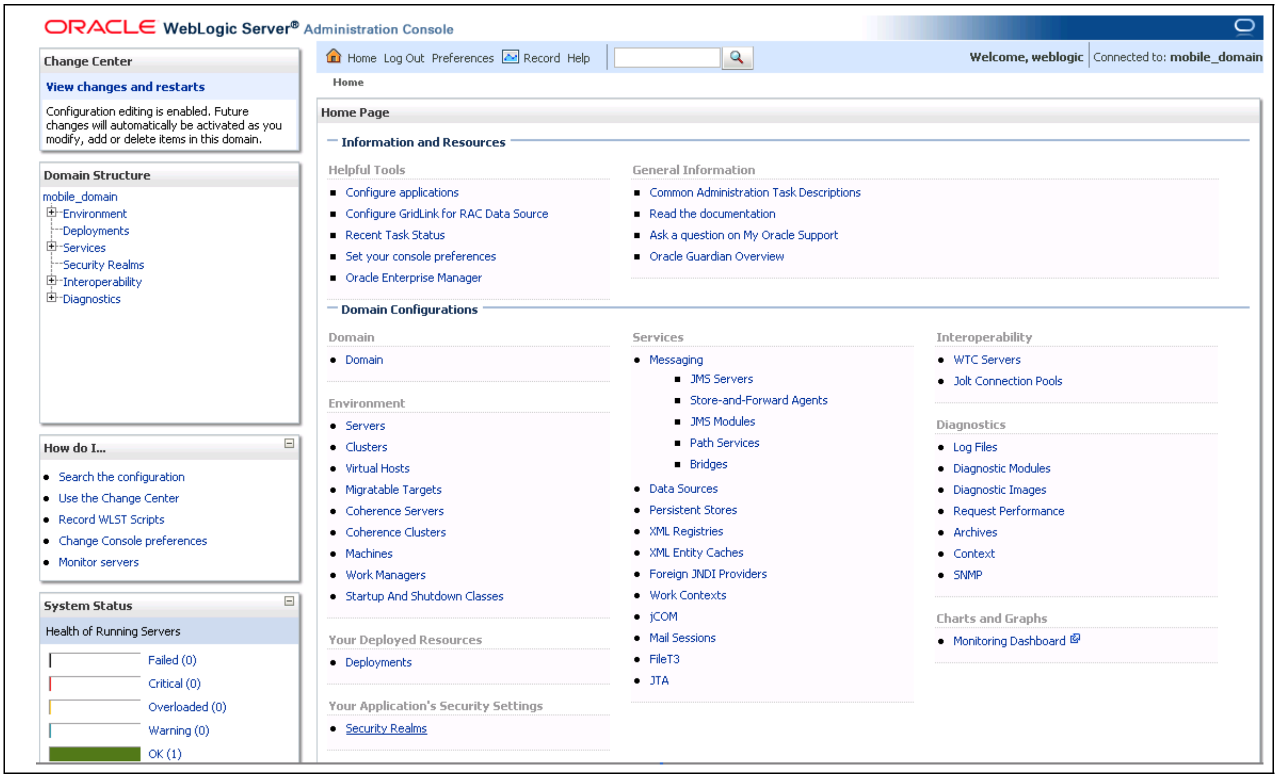
      The Oracle WebLogic Server 11g Administration Console - Welcome and login page appears, as shown in the following example:



Oracle WebLogic Server 11g Administration Console - Welcome and Log in page

   b. On the Welcome and login page, in the User ID field enter *weblogic*, and in the Password field enter a password (for example, *welcome1*).

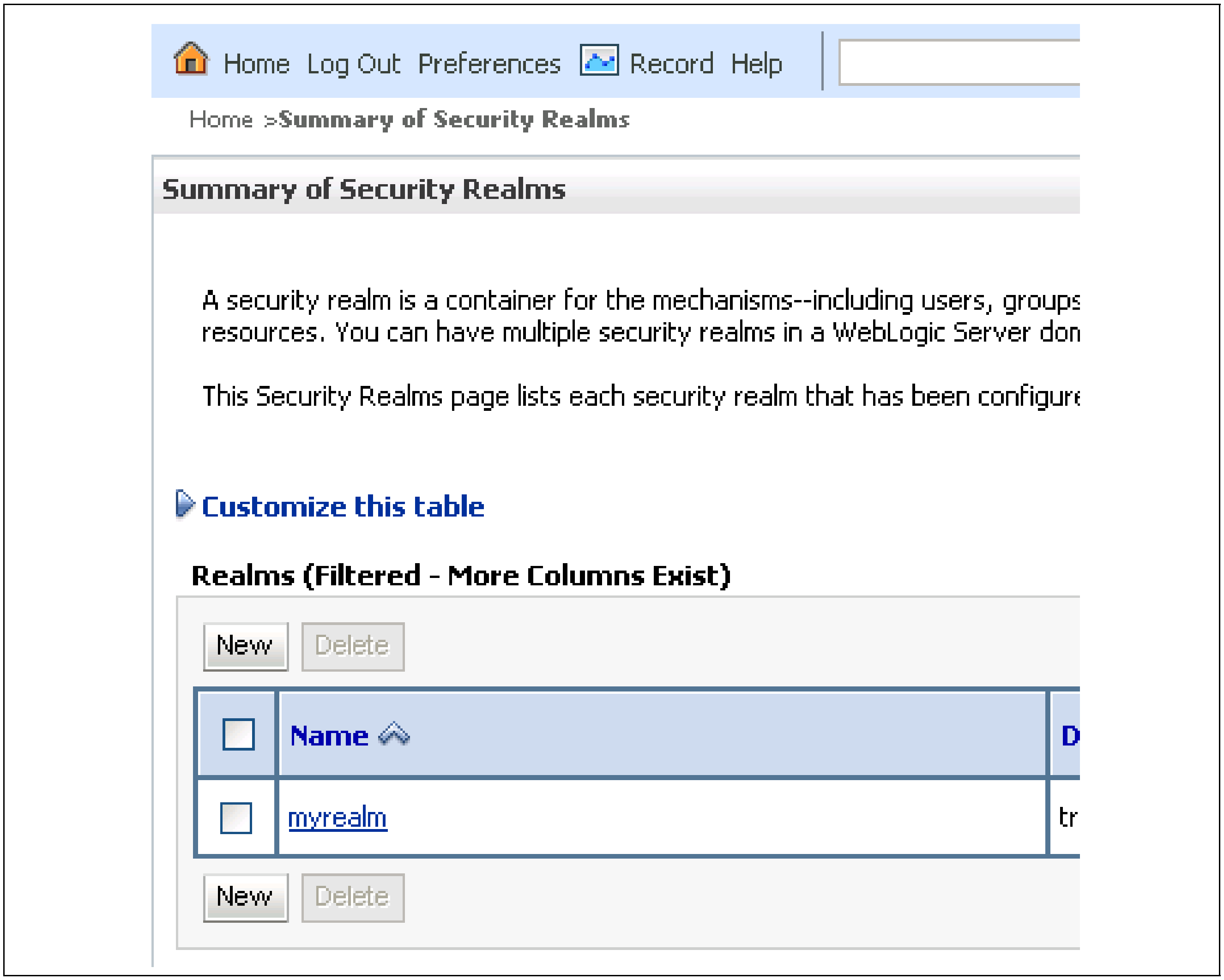
      The Oracle WebLogic Server Administration Console - Home page appears, as shown in the following example:



Oracle WebLogic Server Administration Console - Home page

2. On the Home page, click the *Security Realms* link under the section *Your Application's Security Settings*.

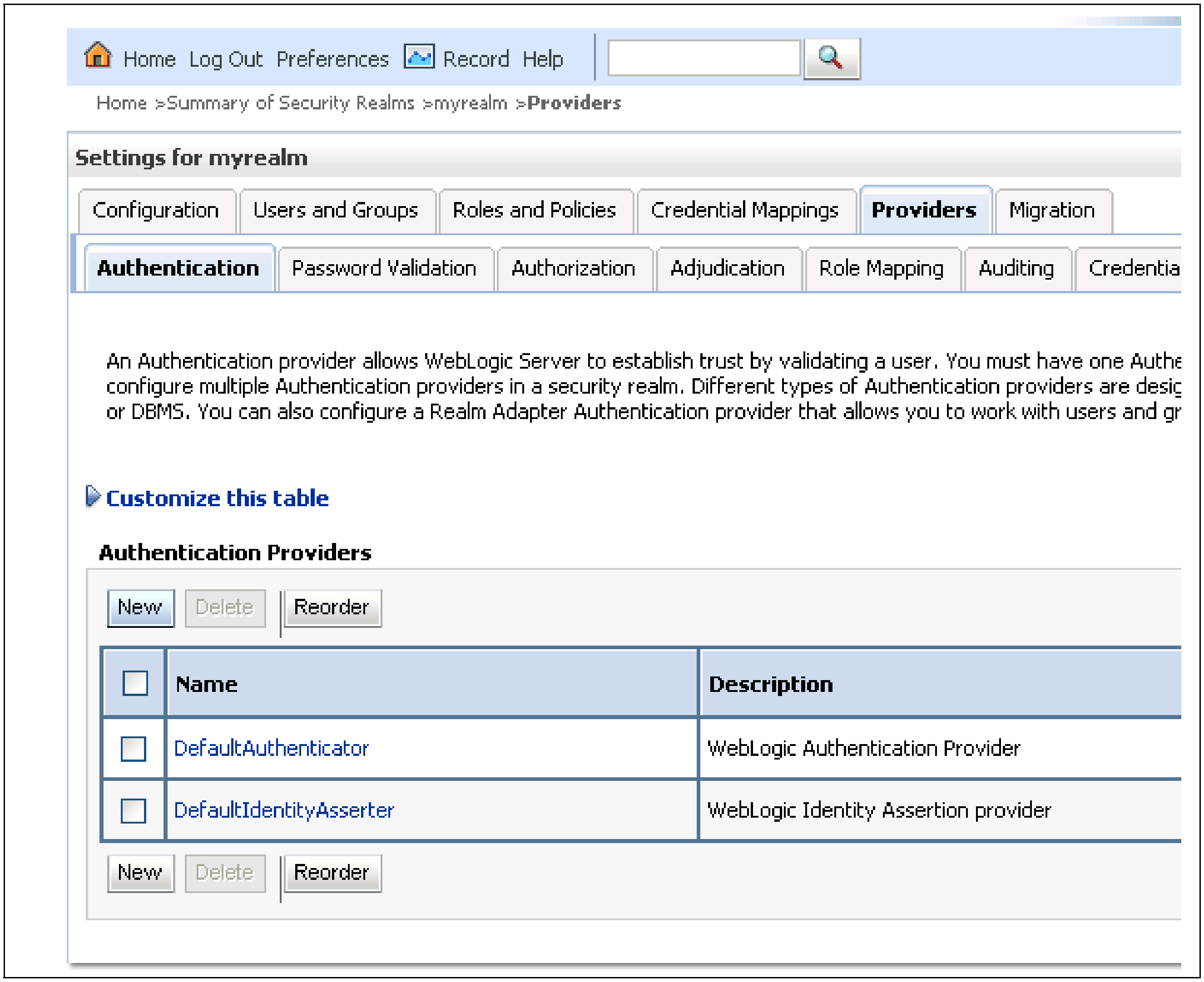
   The Oracle WebLogic Server Administration Console - Summary of Security Realms page appears, as shown in the following example:



Oracle WebLogic Server Administration Console - Summary of Security Realms page

3. On the Summary of Security Realms page, click the *myrealm* link, to open the default security realm.

   The Oracle WebLogic Server Administration Console - Authentication Providers page appears, as shown in the following example:



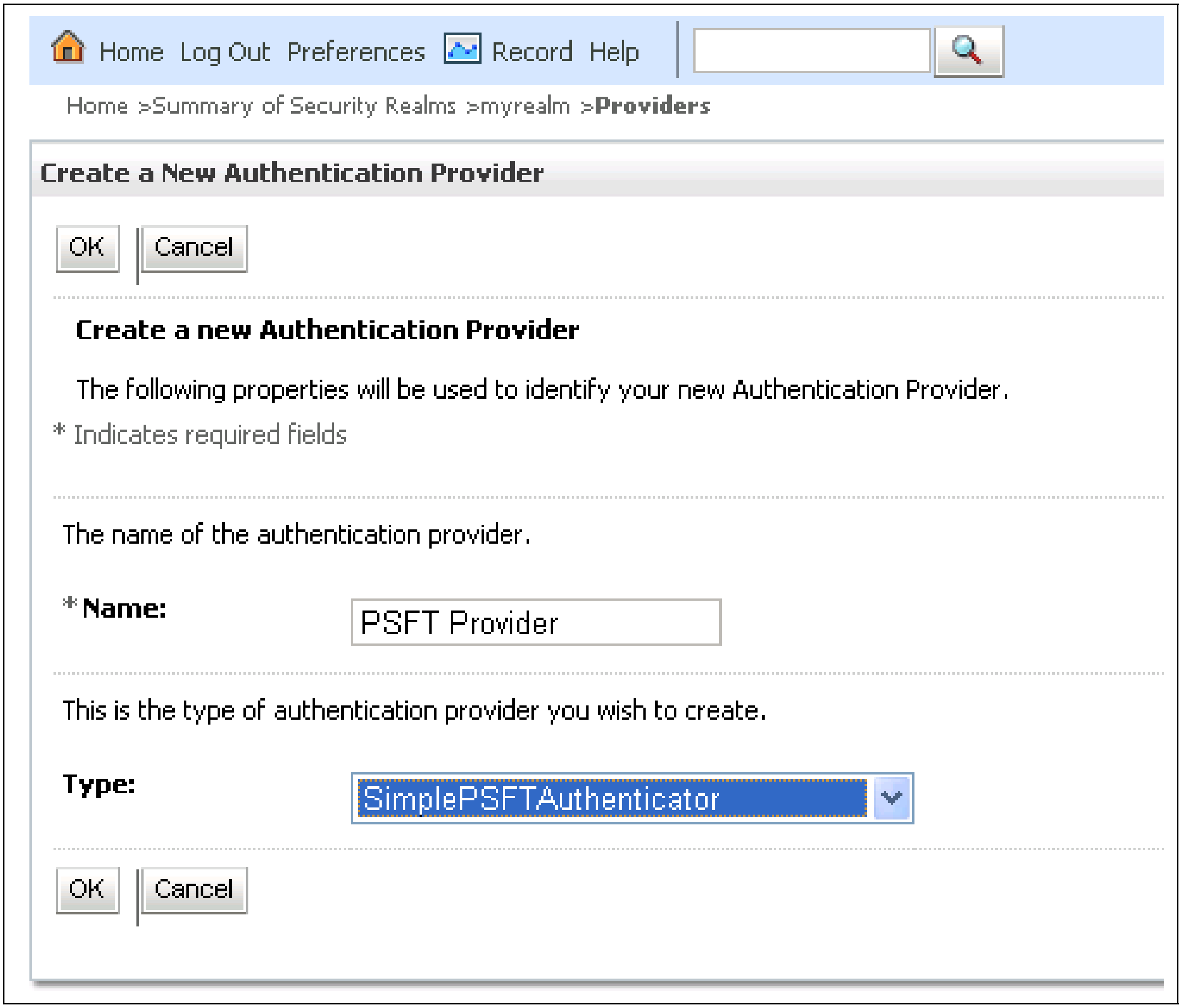
Oracle WebLogic Server Administration Console - Authentication Providers page

4. On the Authentication Providers page, select the Providers tab to access the Providers page and options.

   The Oracle WebLogic Server Administration Console - Providers page appears.

5. On the Providers page, select the Authentication tab and then click the *New* button in the Authentication Providers table.

   The Oracle WebLogic Server Administration Console - Create a New Authentication Provider page appears, as shown in the following example:



Oracle WebLogic Server Administration Console - Create a New Authentication Provider page

6. On the Create a New Authentication Provider page, do the following:
   a. In the Name field, enter a name for the PeopleSoft Provider.

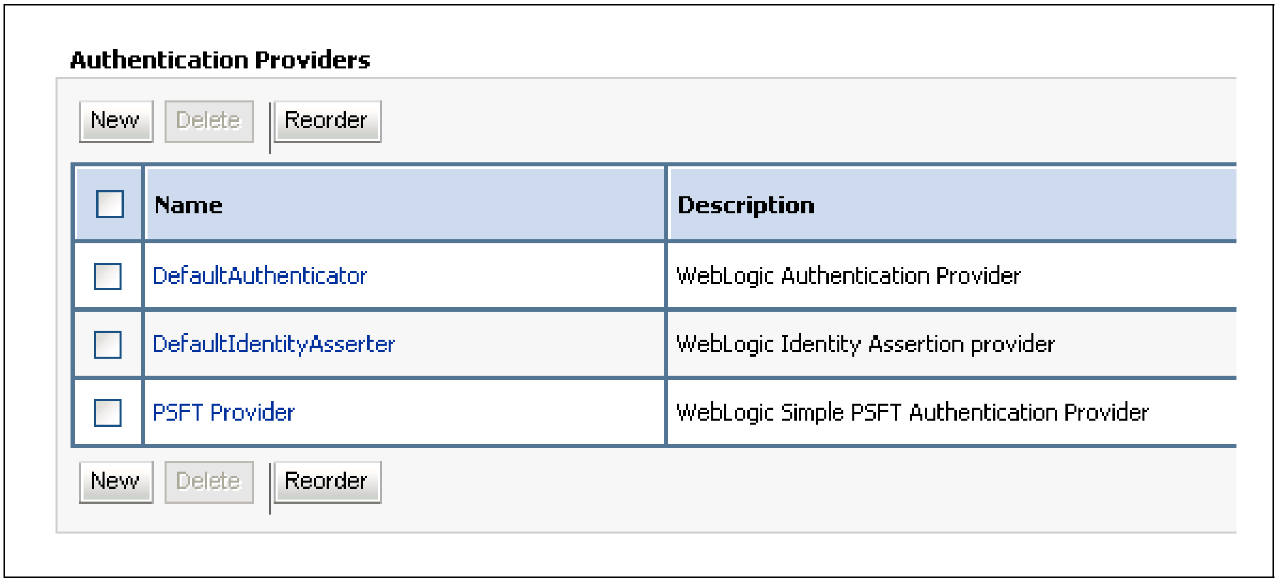
      For example: *PSFT Provider*

      This name is for identification purposes only and does not need to match any specific value.
   b. In the Type field, select *SimplePSFTAuthenticator* from the drop-down list box.

      If *SimplePSFTAuthenticator* is not available for selection, return to the first step and verify that the file *wlPSFTSecurityProviders.jar* is in the correct subdirectory.
   c. Click OK.

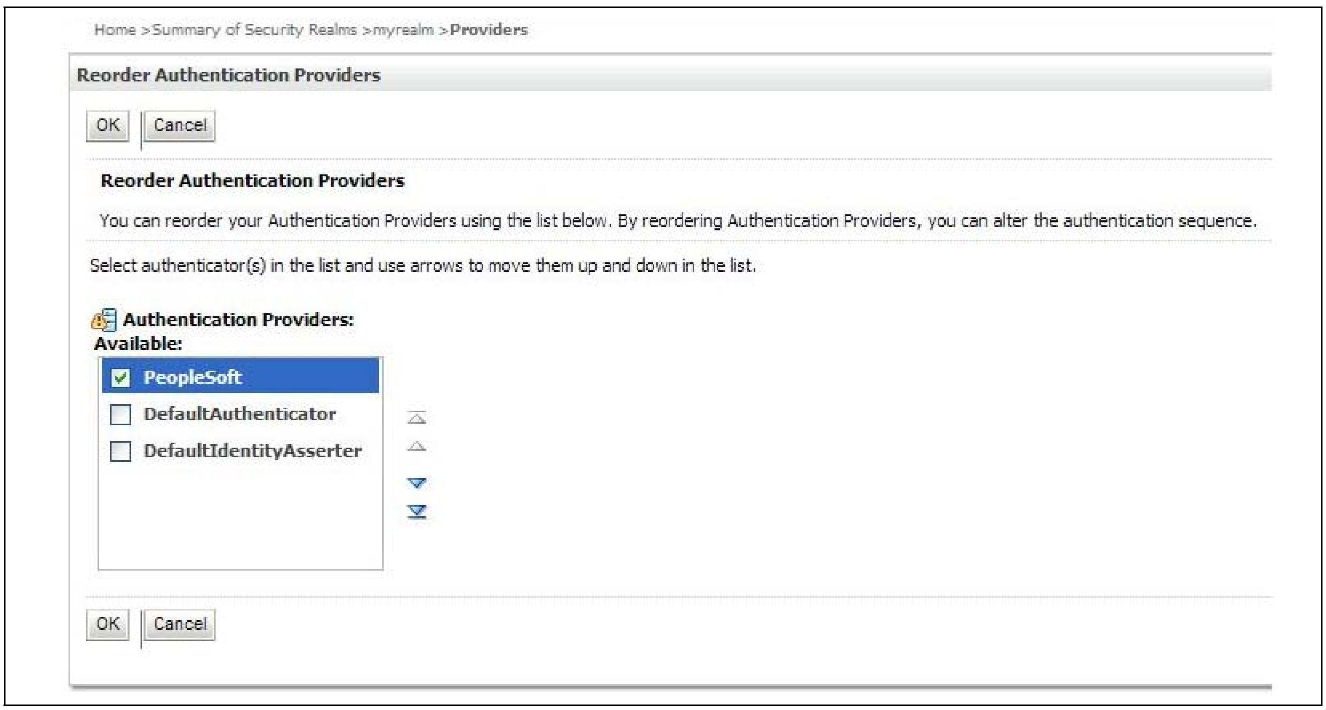
      The system returns you to the Authentication Providers page.

      Alternatively, you can click the Providers link in the navigation at the top of the screen.



Oracle WebLogic Server Administration Console - Authentication Providers page

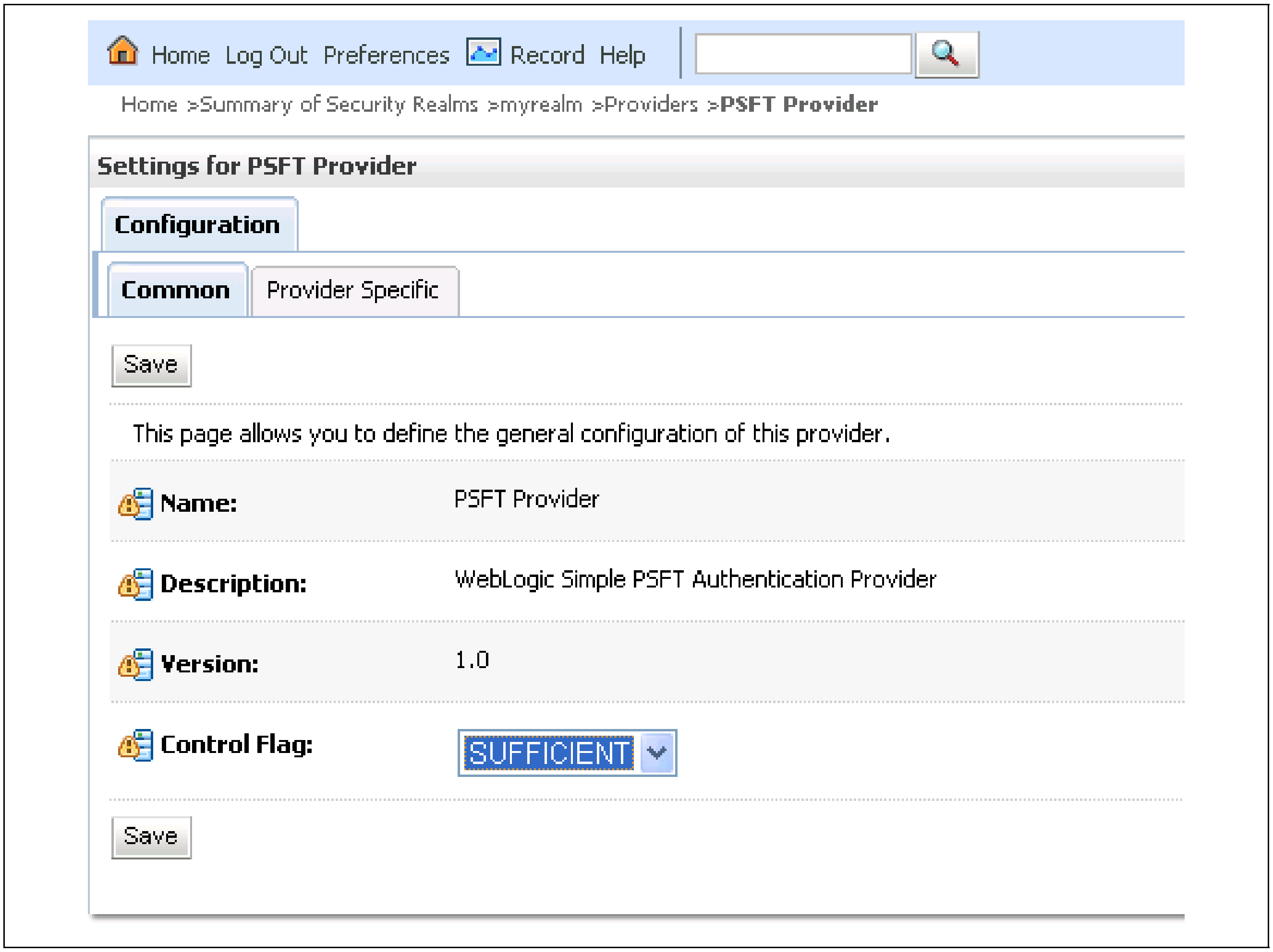
7. On the Authentication Providers page, click the Reorder button to access the Reorder Authentication Providers page, as shown in the following example:



Reorder Authentication Providers page

8. On the Reorder Authentication Providers page, do the following:
   a. Select the PSFT Provider check box and use the arrows to move the PSFT Provider to the top of the list.
   b. After the PSFT Provider reaches the top of the list, click OK to save the order.
9. On the Authentication Providers page, click the link for the PSFT provider that you just added (for example *PSFT Provider*) to access the properties for that provider.

The Oracle WebLogic Server Administration Console - Settings for PSFT Provider page appears, as shown in the following example:



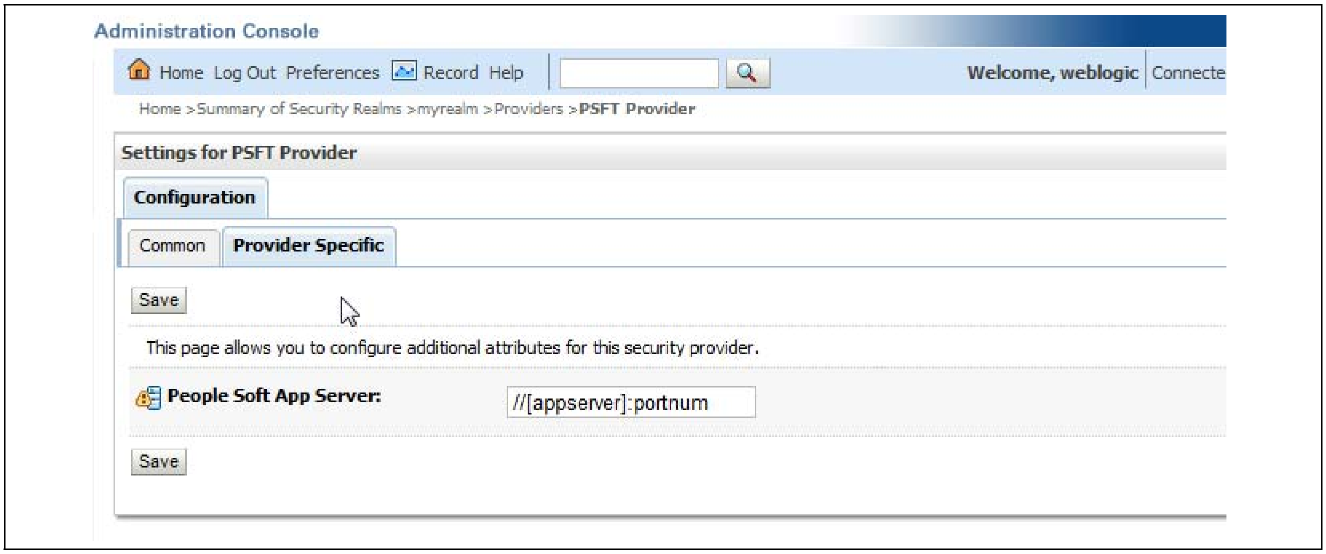
Oracle WebLogic Server Administration Console - Settings for PSFT Provider page

10. On the Settings for PSFT Provider - Configuration: Common page, select *SUFFICIENT* from the Control Flag drop-down list box for the PeopleSoft Provider, and then click Save.

    This specifies that a logon of true from the PSFT Provider is enough authentication to allow an application to run on the server.

11. Select the Provider Specific tab to access and configure the Provider Specific settings for the PSFT Authentication Provider.

    The Oracle WebLogic Server Administration Console - Settings for PSFT Provider: Provider Specific page appears, as shown in the following example:



Oracle WebLogic Server Administration Console - Settings for PSFT Provider: Provider Specific page

12. On the Settings for PSFTAuthenticator - Provider Specific page, do the following:
    - In the PeopleSoft App Server field, enter the machine name and port number (the jolt port number) for your PeopleSoft Application Server.
    - If your application servers are set up for *failover*, you can enter more than one application server and port number delimited by a semicolon.

Important! Your application server *must* be the same PeopleSoft PeopleTools version as the psjoa.jar file that you previously copied to your web server.

See Copying the PeopleSoft psjoa.jar File

- If you are unsure of your application server and port number, you can find that information in the integration.properties file under the Jolt Connect section, or online on the Advanced Gateway Settings pag.

13. Click Save.

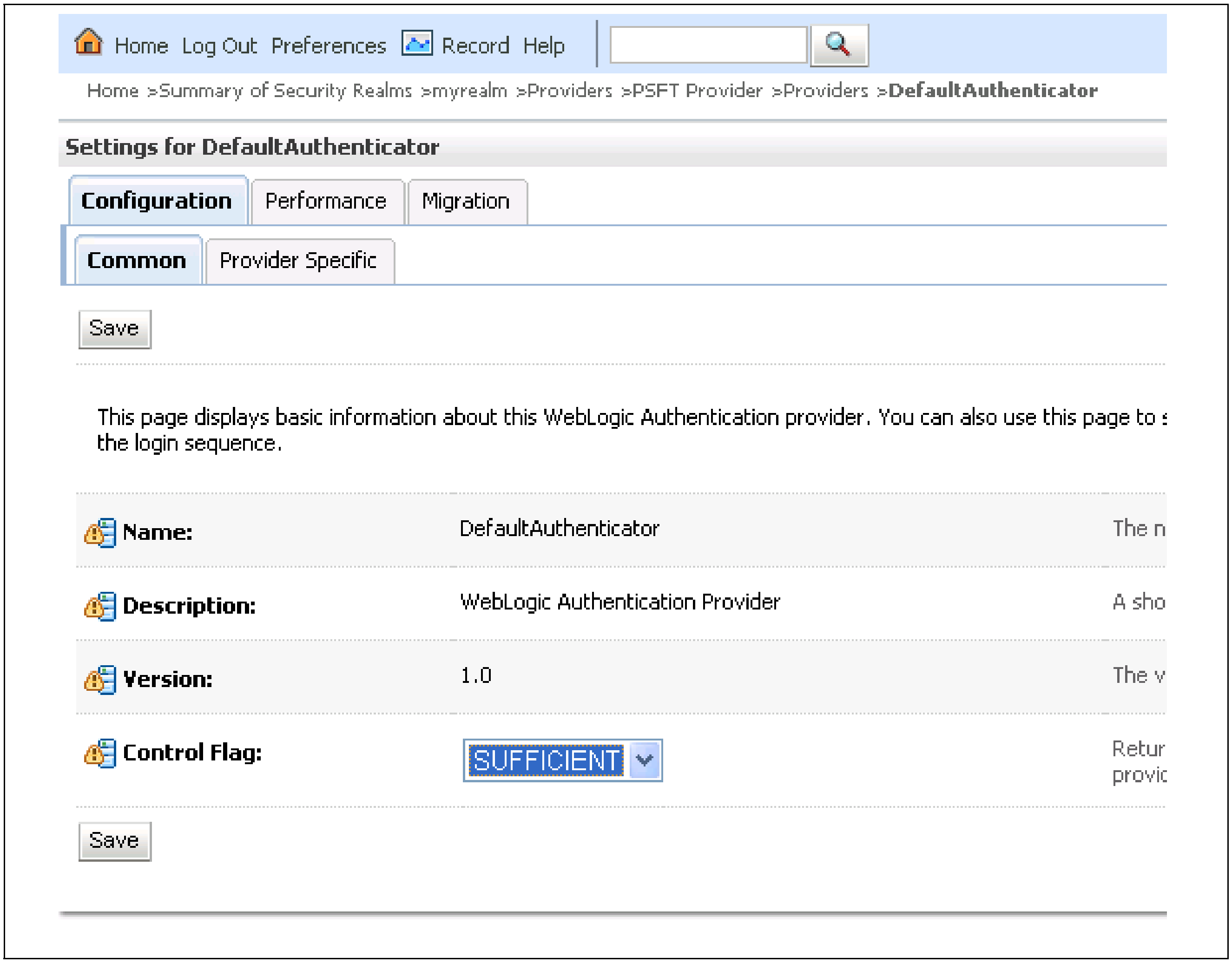
    The example that follows shows where you can locate your application server and port number on the Advanced Gateway Settings page.

    Oracle recommends that you use the Local Node App Server URL. The Gateway Default App Server can also be used.

Advanced Gateway Settings page for the Gateway Default App. Server - Showing Node Name PSFT_EP (Local Node)

14. Click the Providers link in the navigation at the top of the screen to return to the Authentication Providers page.
15. On the Authentication Providers page, click the Default Authenticator link to access and configure the settings for the Default Authenticator.

    The Oracle WebLogic Server Administration Console - Settings for Default Authenticator page appears, as shown in the following example:



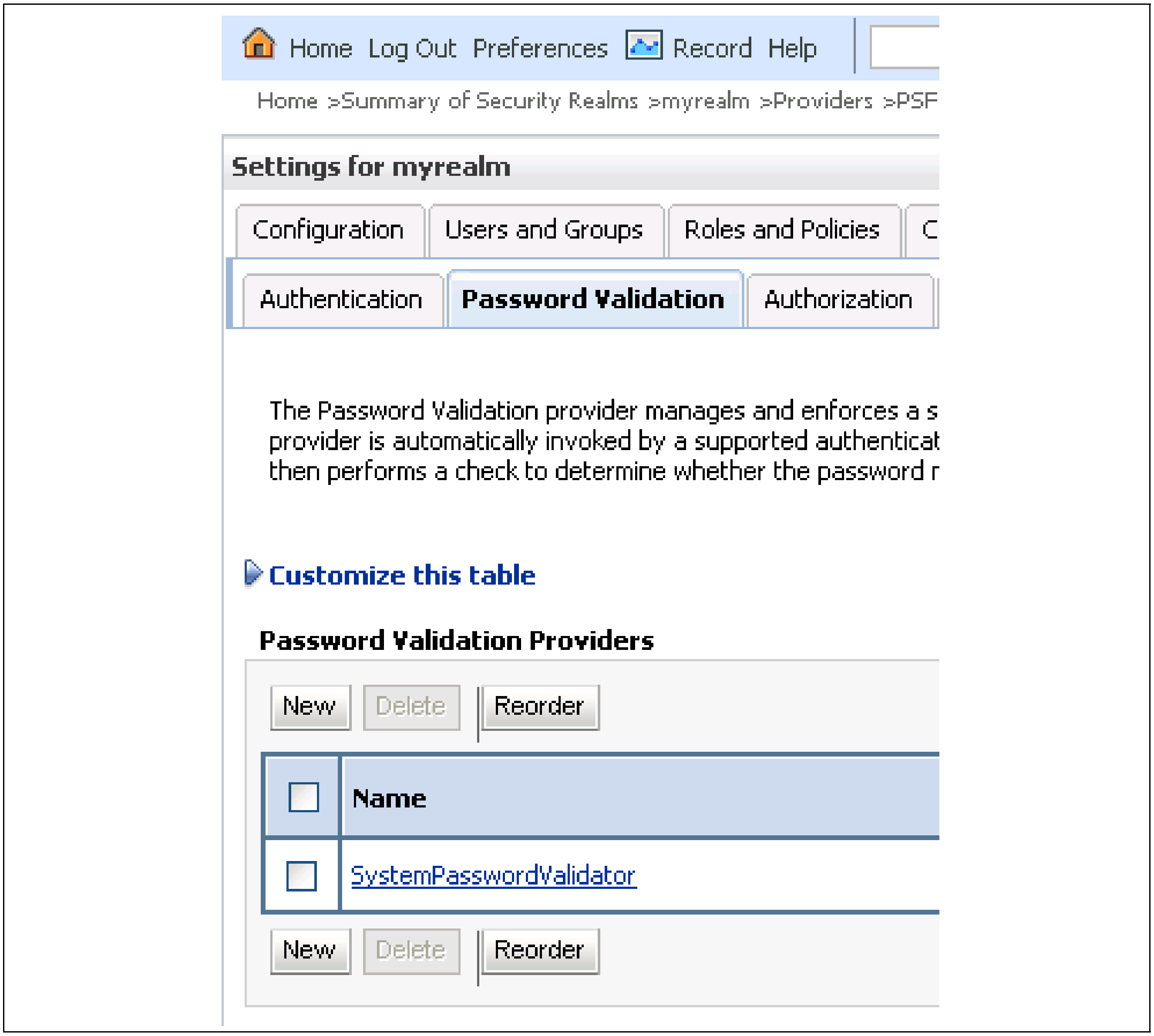
Oracle WebLogic Server Administration Console - Settings for DefaultAuthenticator page

16. On the Settings for Default Authenticator - Configuration: Common page, select *SUFFICIENT* from the Control Flag drop-down list box for the Default Provider, and then click Save.

    This specifies that a logon of true from the Default Provider is enough authentication to allow an application to run on the server. The Default Authenticator is set to *REQUIRED*. If you do not change this default setting, applications will not run unless the Default Authenticator validates the session.

17. Click the myrealm link in the navigation at the top of the screen to return to the myRealm page.

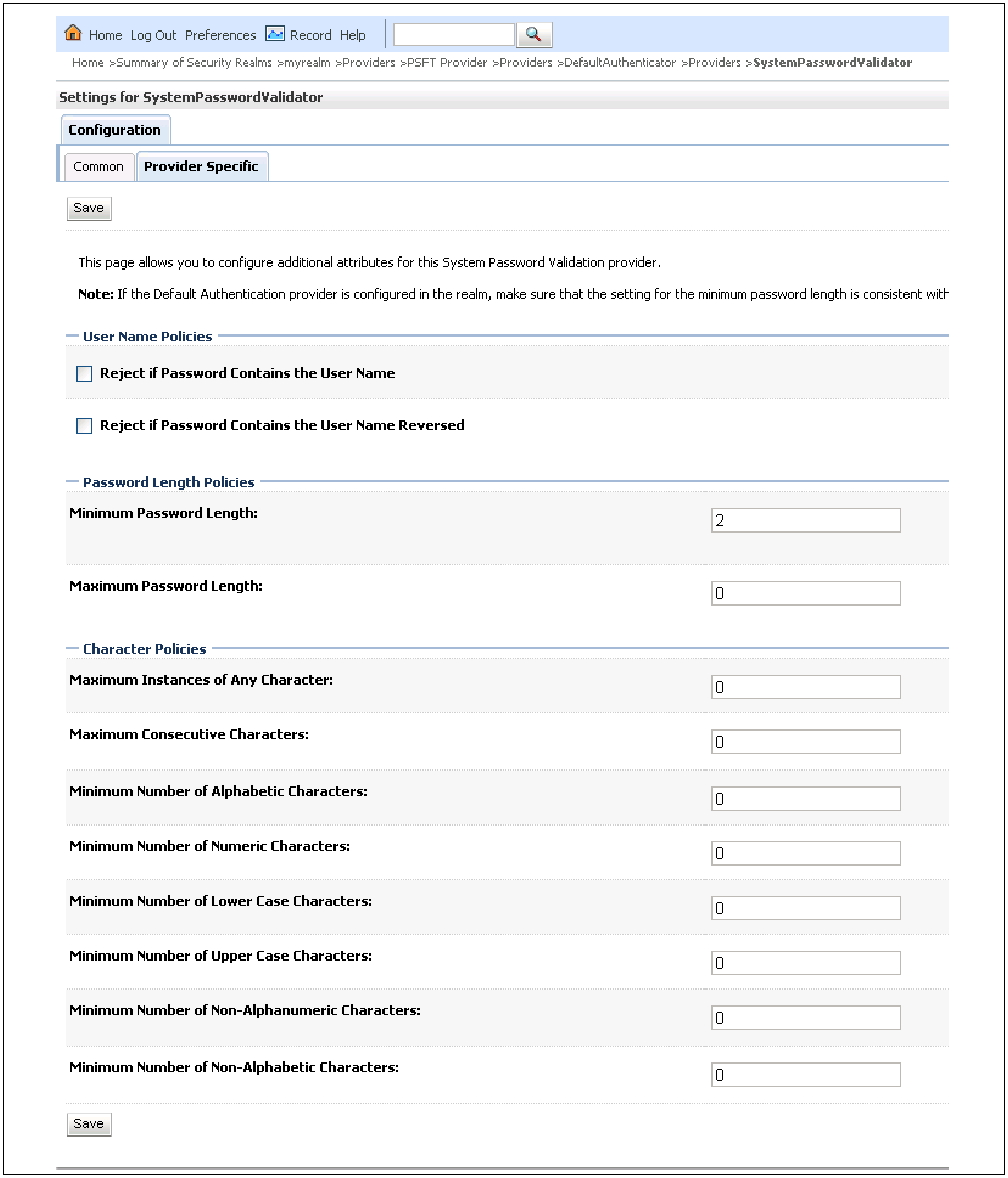
18. On the Settings for the myRealm page, select the Providers tab and then select the Password Validation tab, as shown in the following example:



Oracle WebLogic Server Administration Console - Settings for MyRealm page

19. On the Settings for myrealm - Password Validation page, click the SystemPasswordValidator link to access the properties for that validator.

    The Oracle WebLogic Server Administration Console - Settings for SystemPasswordValidator page appears, as shown in the following example:



Oracle WebLogic Server Administration Console - Settings for SystemPasswordValidator page

20. On the Settings for SystemPasswordValidator page, select the Provider Specific tab and modify the properties as follows:
    - In the Minimum Password Length field, enter a value of *2.*

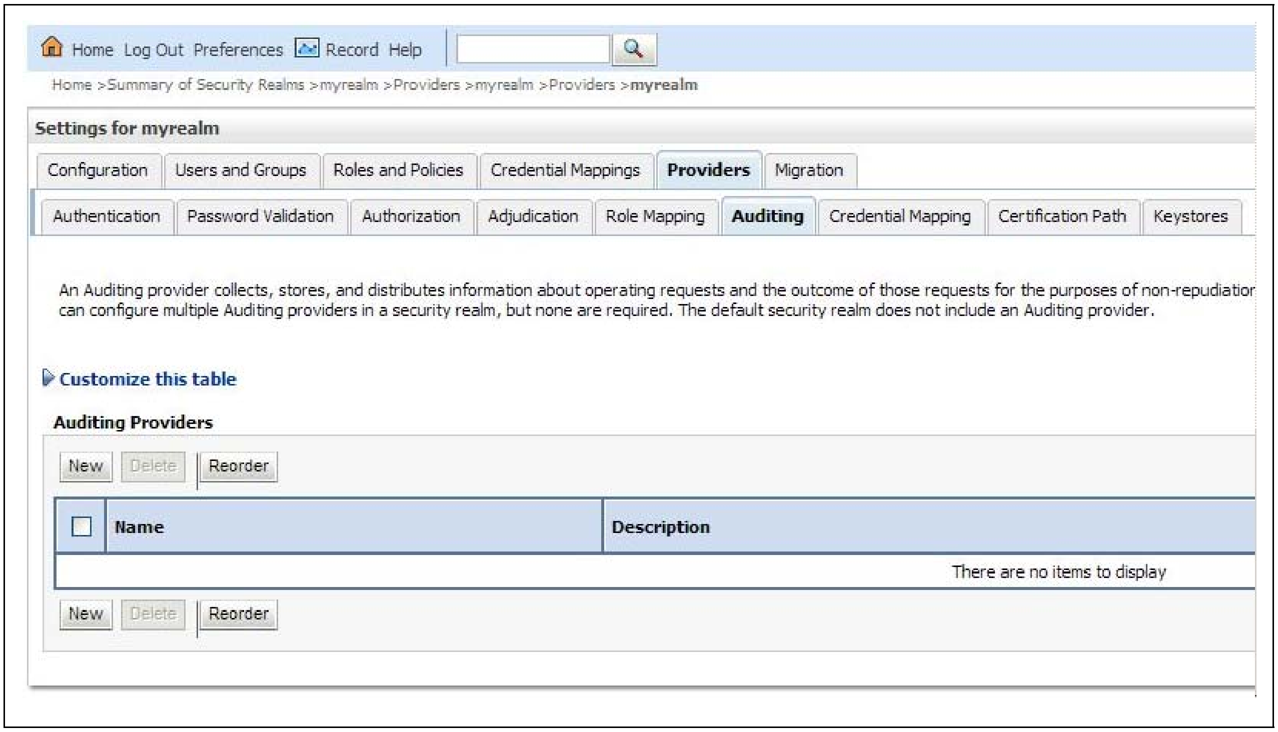
- In the Minimum Number of Non-Alphabetic Characters field, enter a value of *0*.
- Click Save.

21. To verify that the Jolt Connection is set up and working properly, add a Security Audit Log by performing the following steps *(Optional)*:

Note. Setting up a Security Audit Log is *optional* and not required to run PeopleSoft Mobile Inventory Management, however; it could be useful in tracking down connection errors, particularly after PeopleSoft PeopleTools upgrades.

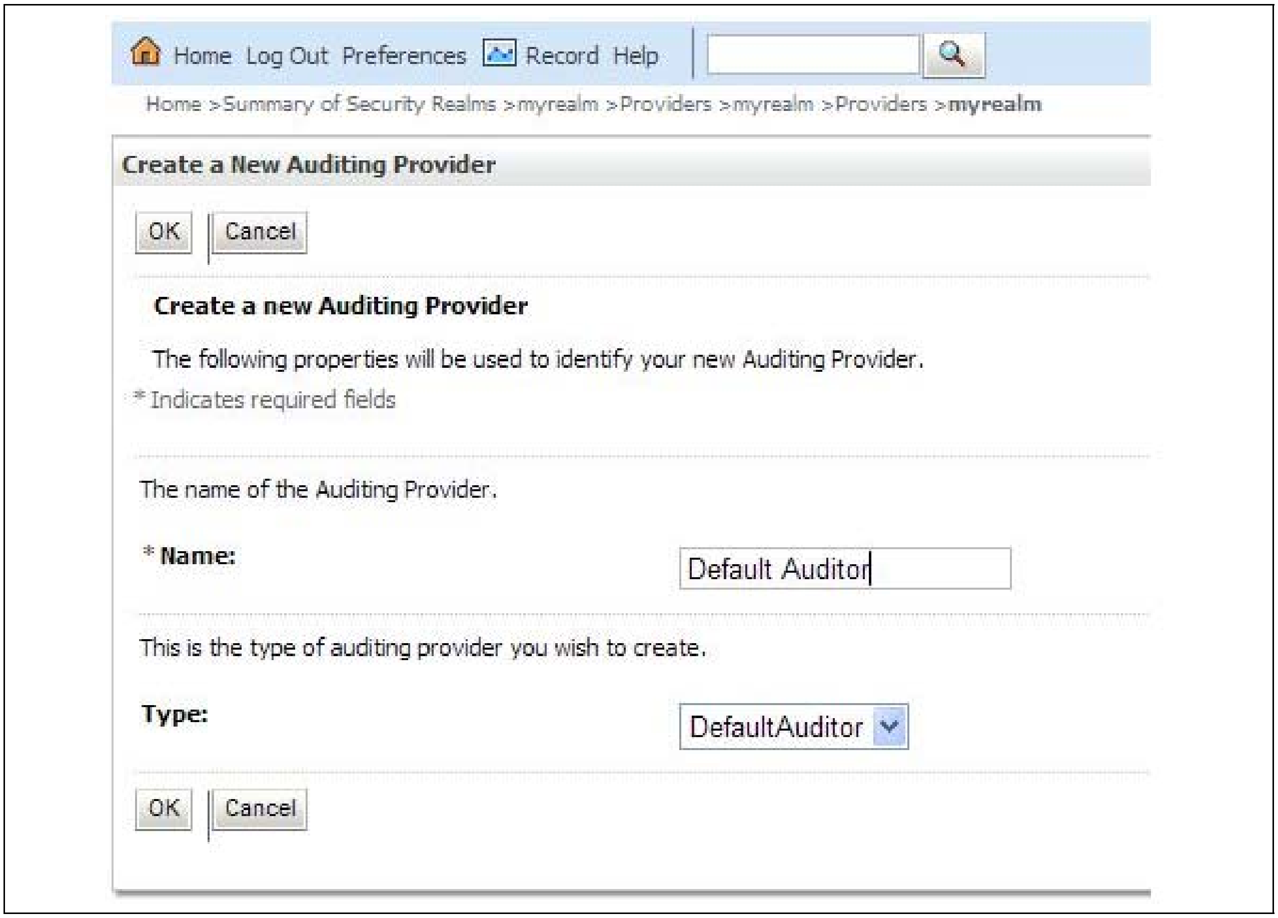
---

a. From the Provider's page, select the Auditing tab to access the Auditing Providers page, as shown in the following example:



Settings for myrealm - Auditing Providers page

b. On the Auditing Providers page, click the New button to access the Create a New Auditing Provider setup page, as shown in the following example:

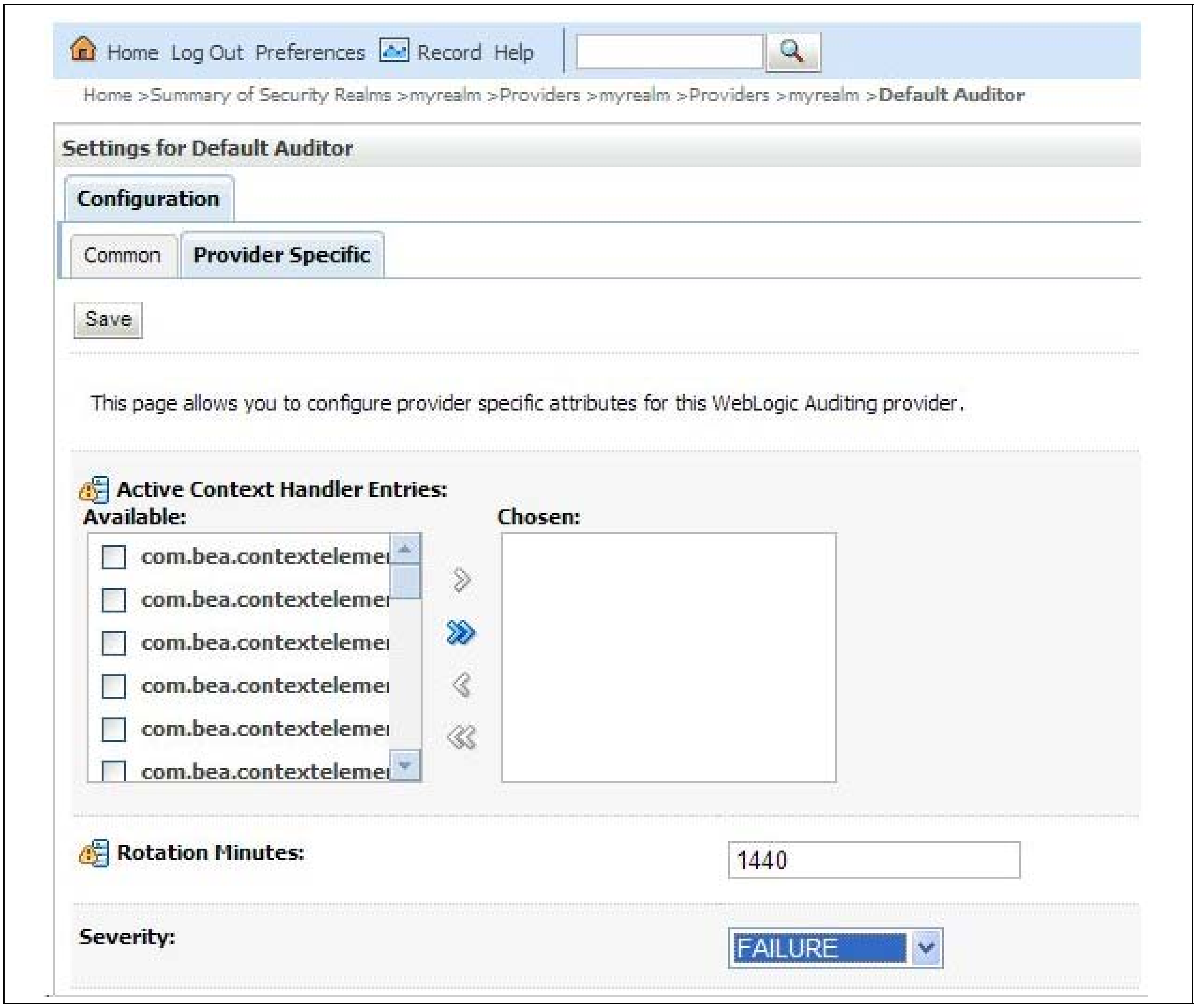


Create a New Auditing Provider page

c. On the Create a New Auditing Provider page, in the Name field enter *Default Auditor,* and in the Type field select *Default Auditor* from the drop-down list box.

d. Click OK.

e. On the Provider Specific page for the Default Auditor that you just created, in the Severity field select *Failure* from the drop-down list box, as shown in the following example:



Settings for Default Auditor - Configuration: Provider Specific page

Selecting a severity level of *Failure* logs any failure to connect from the Authentication Provider to the PeopleSoft Application Server using the Jolt Connection.

f. Click Save.

22. Log out and cycle the Oracle WebLogic Server instance.

    This enables the PSFT Authentication Provider to install properly.

23. Restart the Oracle WebLogic Server instance.

Task 22-5: Installing the PeopleSoft Database

This section discusses:

- Understanding the PeopleSoft Mobile Inventory Management Installation and Set Up Within PeopleSoft
- Setting Up Integration with the PeopleSoft System

- Reviewing the Set Up of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker
- Granting Security to PeopleSoft Mobile Inventory Management Objects
- Rebooting the PeopleSoft Application Server
- Verifying PeopleSoft Integration Broker is Web Service Enabled for the PeopleSoft FSCM 9.1 Database
- Setting Installation Options

Understanding the PeopleSoft Mobile Inventory Management Installation and Set Up Within PeopleSoft

To use PeopleSoft Mobile Inventory Management you must complete the set up steps within your PeopleSoft environment. These steps customize PeopleSoft Mobile Inventory Management to your specific needs by setting up servers, identifying users, default values, mobile screen settings, and activating the integration points.

For more information on setting up PeopleSoft application servers and web services, refer to the following reference documents that are available on My Oracle Support:

See *PeopleTools 8.52: System and Server Administration PeopleBook,* for your database platform.

See *PeopleSoft Mobile Inventory Management 9.1 PeopleBook*

Task 22-5-1: Setting Up Integration with the PeopleSoft System

Understanding How to Set Up Integration with the PeopleSoft System

The following steps detail the set up and integration with your PeopleSoft system for use with PeopleSoft Mobile Inventory Management.

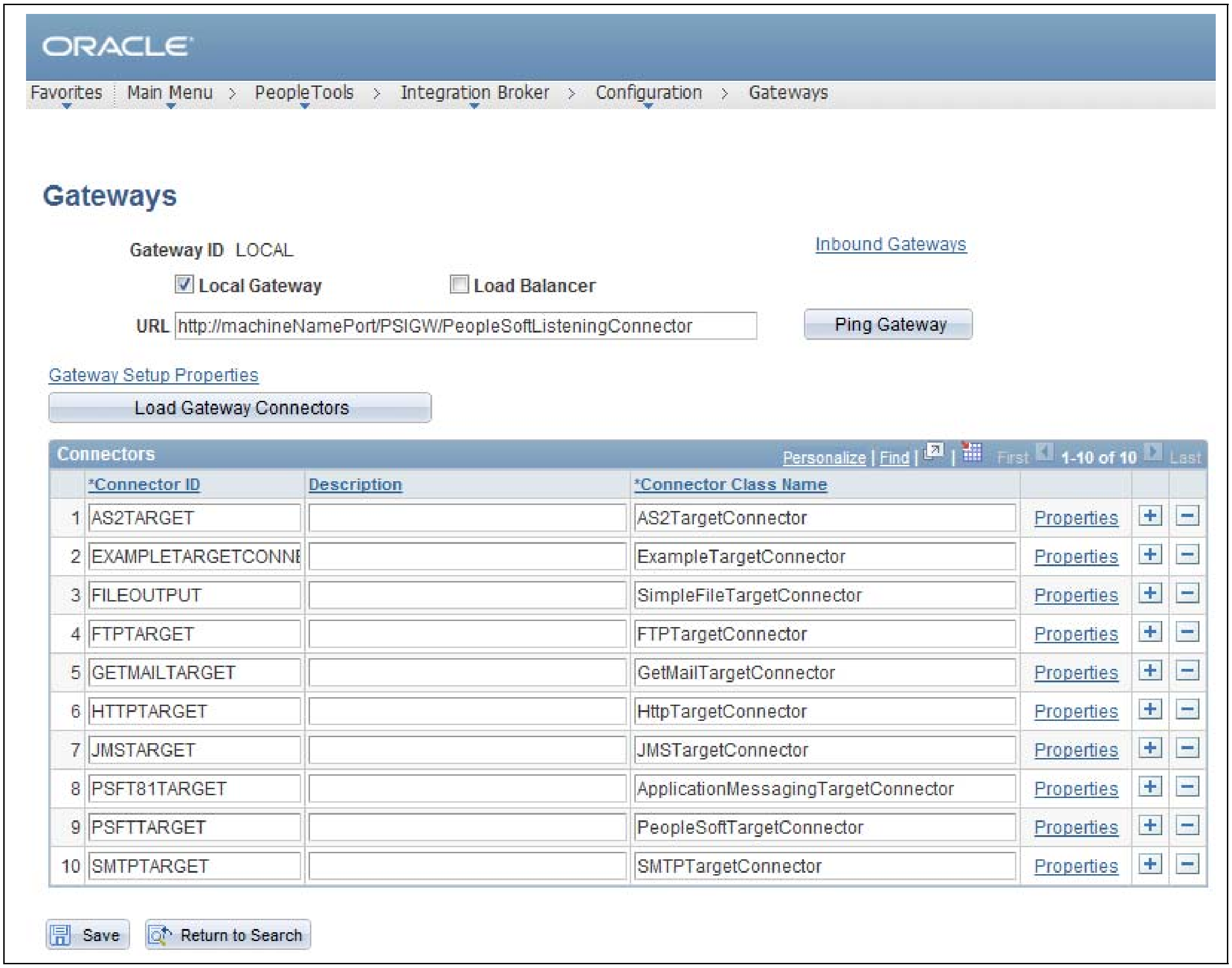
Configuring the PeopleSoft Integration Broker for the Gateway

You must update the PeopleSoft Integration Broker Gateway to recognize your PeopleSoft application server.

To configure the PeopleSoft Integration Broker Gateway:

1. Log in to your PeopleSoft application.
2. Select PeopleTools, Integration Broker, Configuration, Gateways, and then search for and select LOCAL.

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



Gateways page

3. Complete the URL by entering a valid gateway and webserver name and port.

   For example: http://*machineNamePort*/PSIGW/PeopleSoftListeningConnector

4. Click Save.

5. Click OK when the following message appears:

   “The Gateway URL has changed. Connector information will be refreshed.”

6. Click the Ping Gateway button.

   The Peoplesoft Integration Gateway page should appear in a new browser window. Close the window.

7. Click the Advanced Gateway Setup link to open the Gateways page.

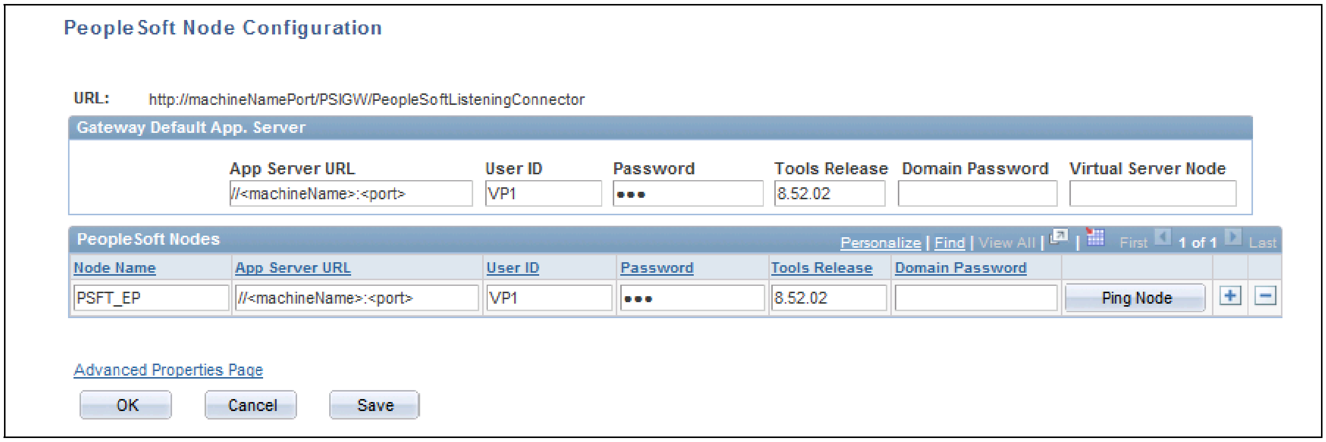
   The Gateways page appears.

8. On the Gateways page, click the Gateway Setup Properties link.

   The system prompts you to enter a user ID and password.

9. In the User ID field, enter *administrator*. In the Password field, enter *password*.

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



PeopleSoft Node Configuration page

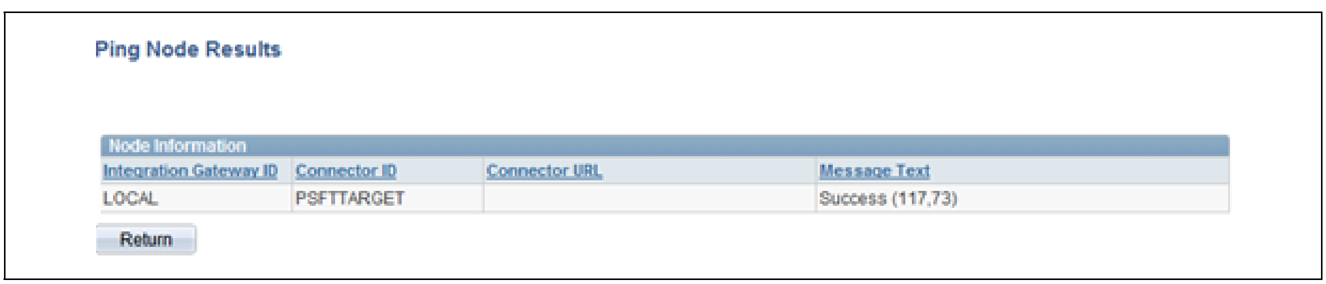
10. On the Peoplesoft Node Configuration page, in the Gateway Default App. Server section, do the following:
    a. In the App Server URL field, enter your application server name and port.
    b. In the User ID and Password fields, enter the user ID and password of a SuperUser in your system (typically *VP1/VP1*).
    c. In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.

       For example, : *8.52.02*
11. In the PeopleSoft Nodes section, in the Node Name field, enter the local node name.

    For example: *PSFT_EP*.
12. Configure the remaining fields for the local node as follows:
    a. In the App Server URL field, enter your application server name and port.
    b. In the User ID and Password fields, enter the user ID and password of a SuperUser in your system (typically *VP1/VP1*).
    c. In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.

       For example: *8.52.02*
13. Click Save.
14. Click the Ping Node button on the Local Node and verify that it returns a response of Success.

    The Ping Node Results page appears as follows, showing “Success” in the Message Text column:



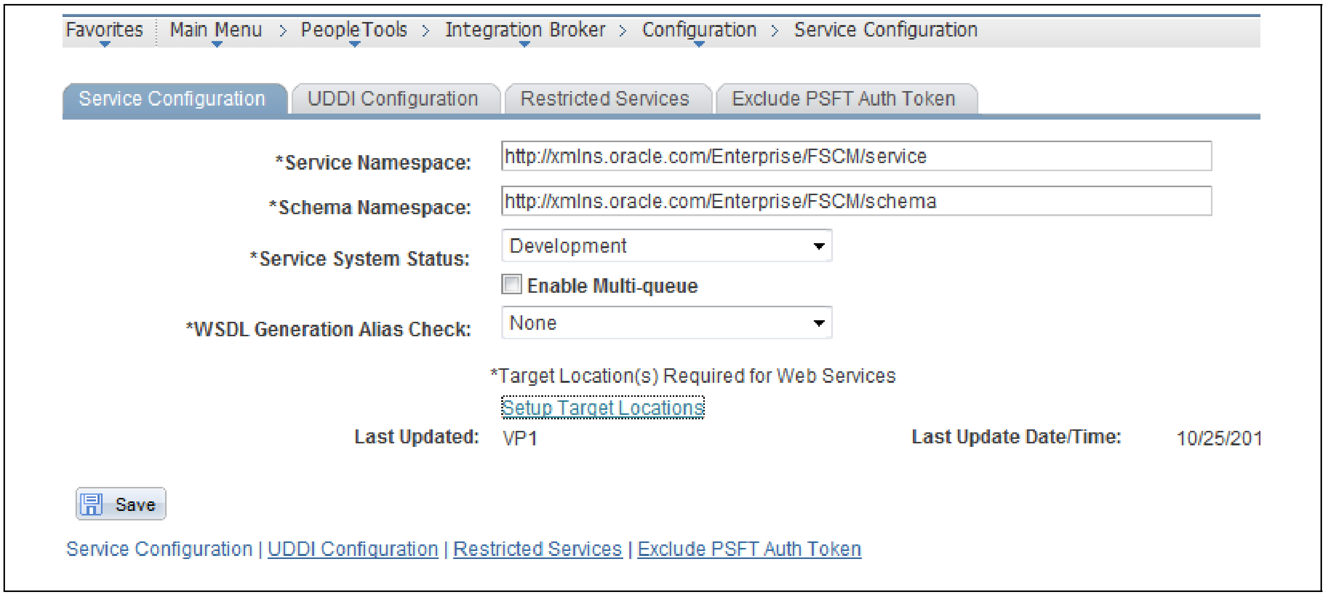
Ping Node Results page

Configuring the PeopleSoft Integration Broker for Web Services

To set up the service configuration for web services:

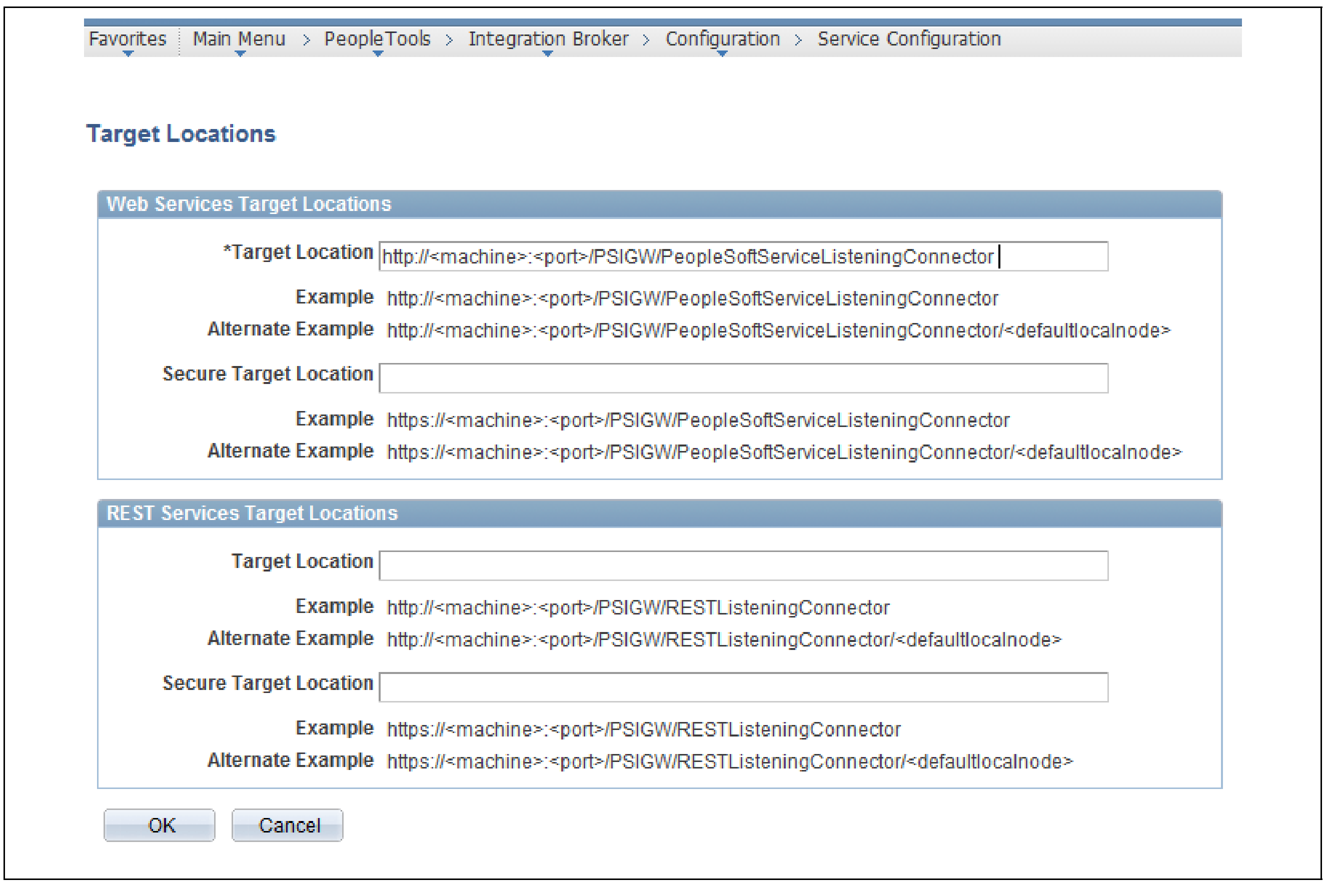
1. Select PeopleTools, Integration Broker, Configuration, Service Configuration.

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



Service Configuration page

2. On the Service Configuration page, click the Setup Target Locations link to access the Target Locations page, as shown in the following example:



Target Locations page

3. On the Target Locations page, complete the Target Location URL by replacing the <*machine*> : <*port*> tokens with your Gateway name and port. In addition, replace the <defaultlocalnode> with the default local node.

   Do the following:

   a. Enter the machine name where your PeopleSoft PeopleTools installation resides.

   b. Enter the HTTP port number for the web server.

   c. Append the default local node to the end (PSFT_EP is the default value).

      The following example uses ui-sun10, 8000 and PSFT_EP:

      http://ui-sun10:8000/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP

      You will use this URL and port during the deployment step of PeopleSoft Mobile Inventory Management.

4. If the system prompts you to update UDDI servers, click Yes.

Configuring the PeopleSoft Integration Broker Domain

To process synchronous messages, one application server domain must be active.

Note. You should set up and configure the application server with Pub/Sub set to *On*.

Before you can use the pub/sub system, you must activate the domain on which a pub/sub server resides.

To activate a domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

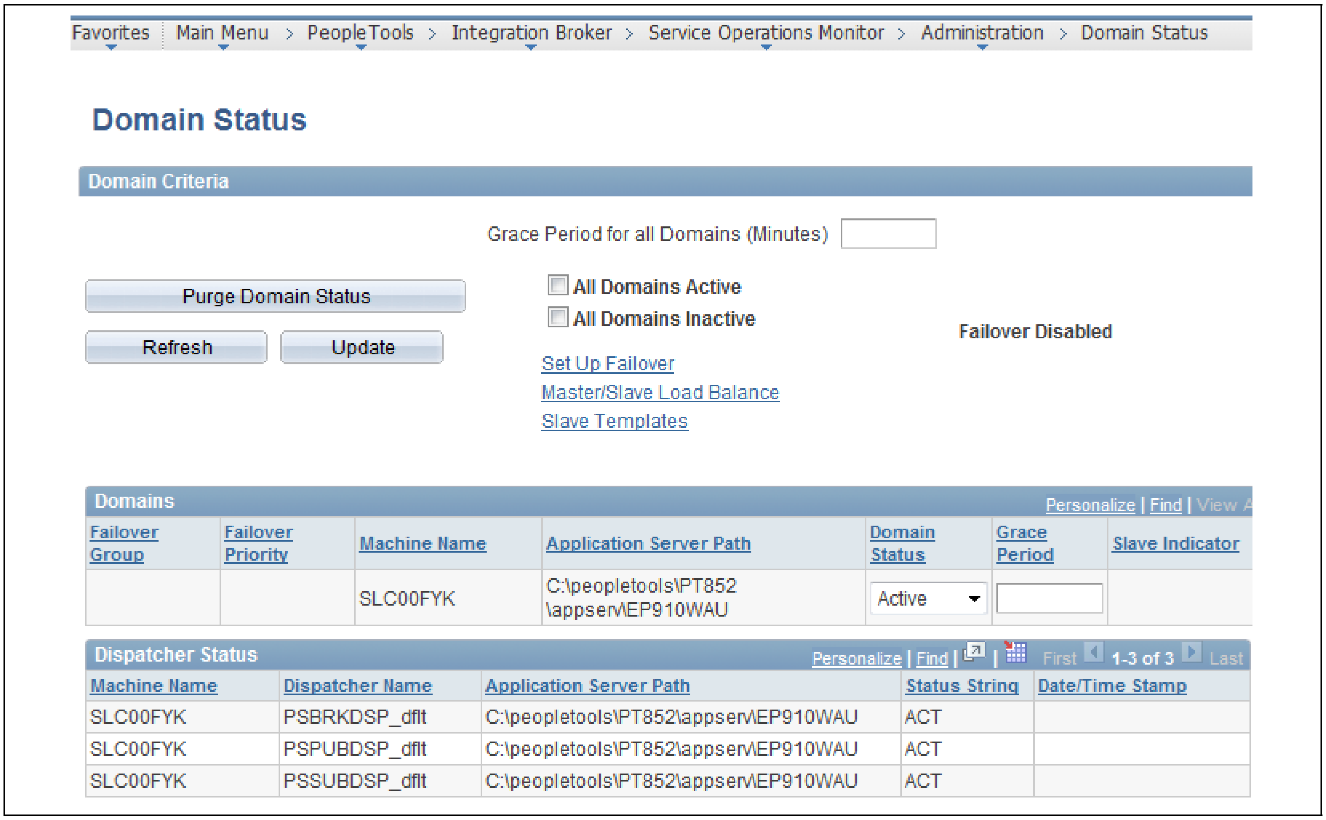
   The Domain Status page appears.

2. In the Domains group box, do the following:

   a. Locate the row that lists the machine where the domain that you want to activate resides.

   b. In the Domain Status field, select *Active* from the drop-down list box.

3. Click the Update button.



Domain Status page

Activating GETWSDL Service Operation Routing

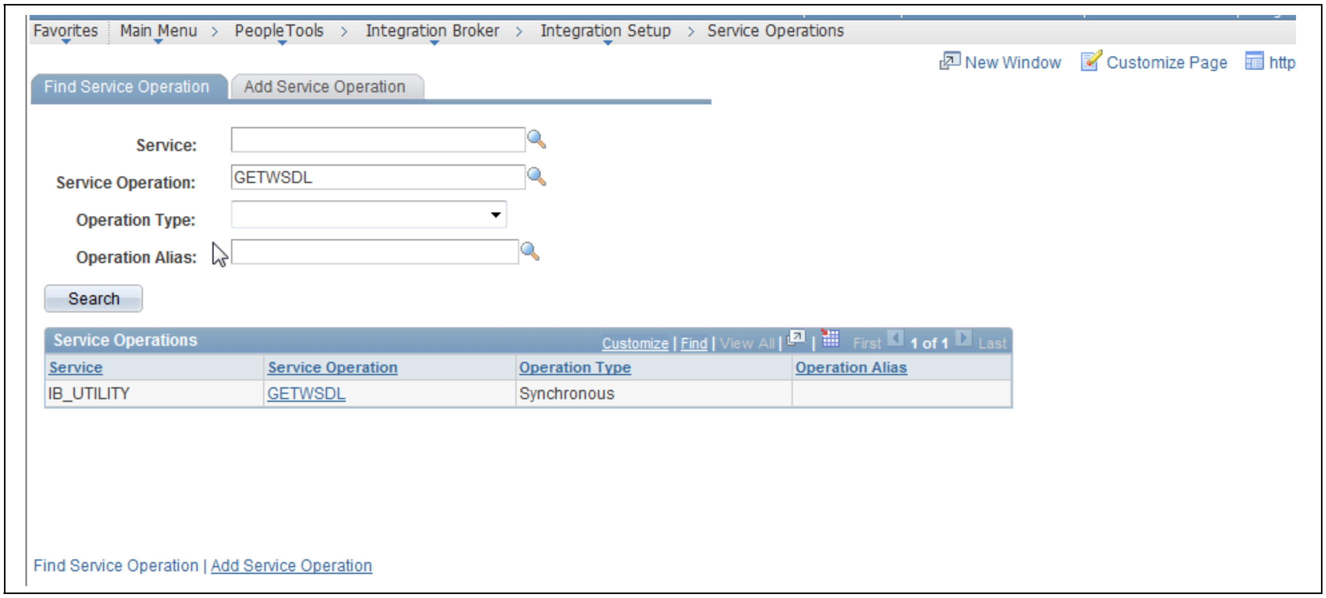
To activate the GETWSDL service operation routing:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

   The Service Operations search page appears.

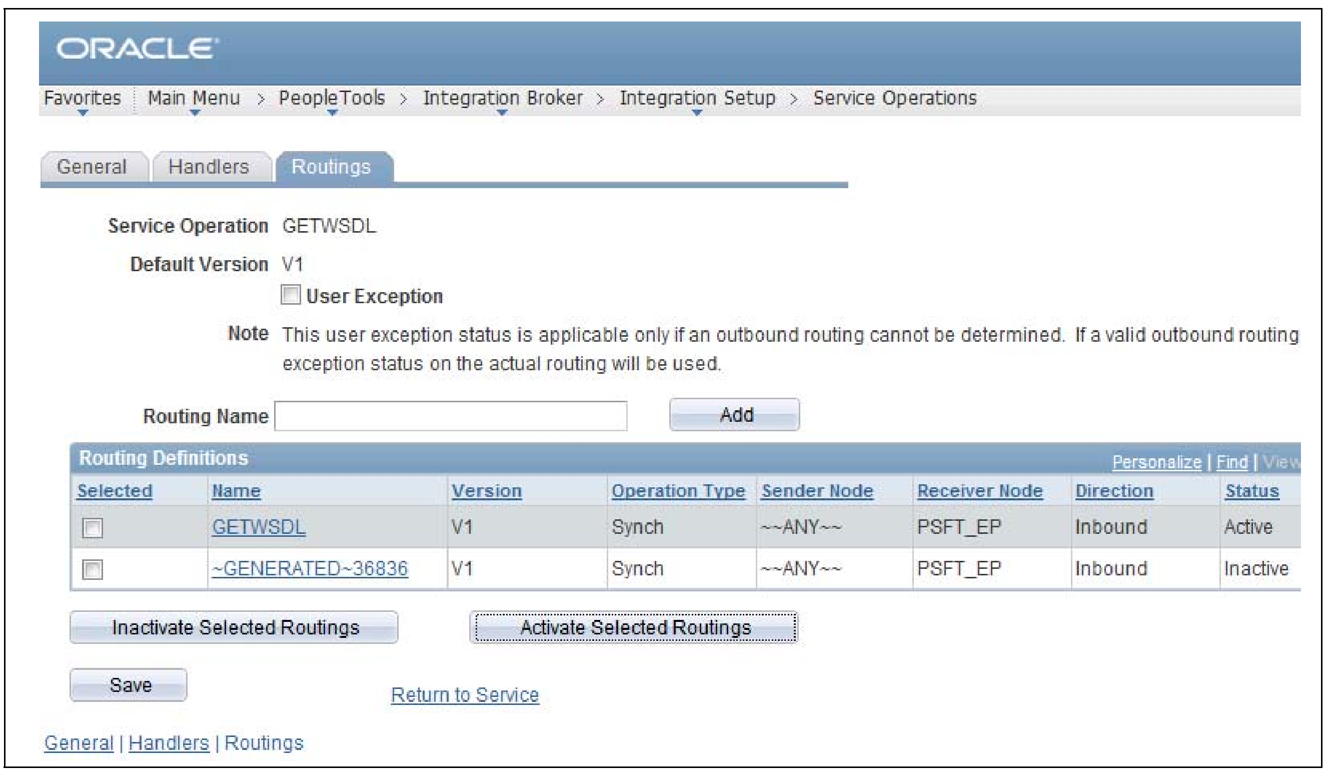
2. On the Service Operations search - Find Service Operation page, in the Service Operation field, enter *GETWSDL*.

3. In the search results grid, click the GETWSDL link to access the GETWSDL service operation of the IB_UTILITY service, as shown in the following example:



Service Operations - Find Service Operation search page

4. On the Service Operations General page for GETWSDL, select the Routings tab to access the Routings page for GETWSDL, as shown in the following example:



Service Operations - Routings page for GETWSDL

5. On the Routings page, in the Routing Definitions group box, select the check box next to GETWSDL to activate the Inbound routing (if it is not already showing a status of *Active*).

Important! Only one routing should be active if there is more than one present. In the preceding example of the Service Operations - Routings page, you can see GETWSDL and GENERATED 36836 in the routing name column, so you could mistakenly assume from this view that GETWSDL and GENERATED 36836 are different, when in fact they are duplicates and the same routing as service operation. Therefore, be careful when you select one to activate and make sure that you do not mistakenly activate both. Otherwise, your Integration Broker test will fail, because only one routing can be active.

6. Click the Activate Selected Routing button.
7. Click Save.

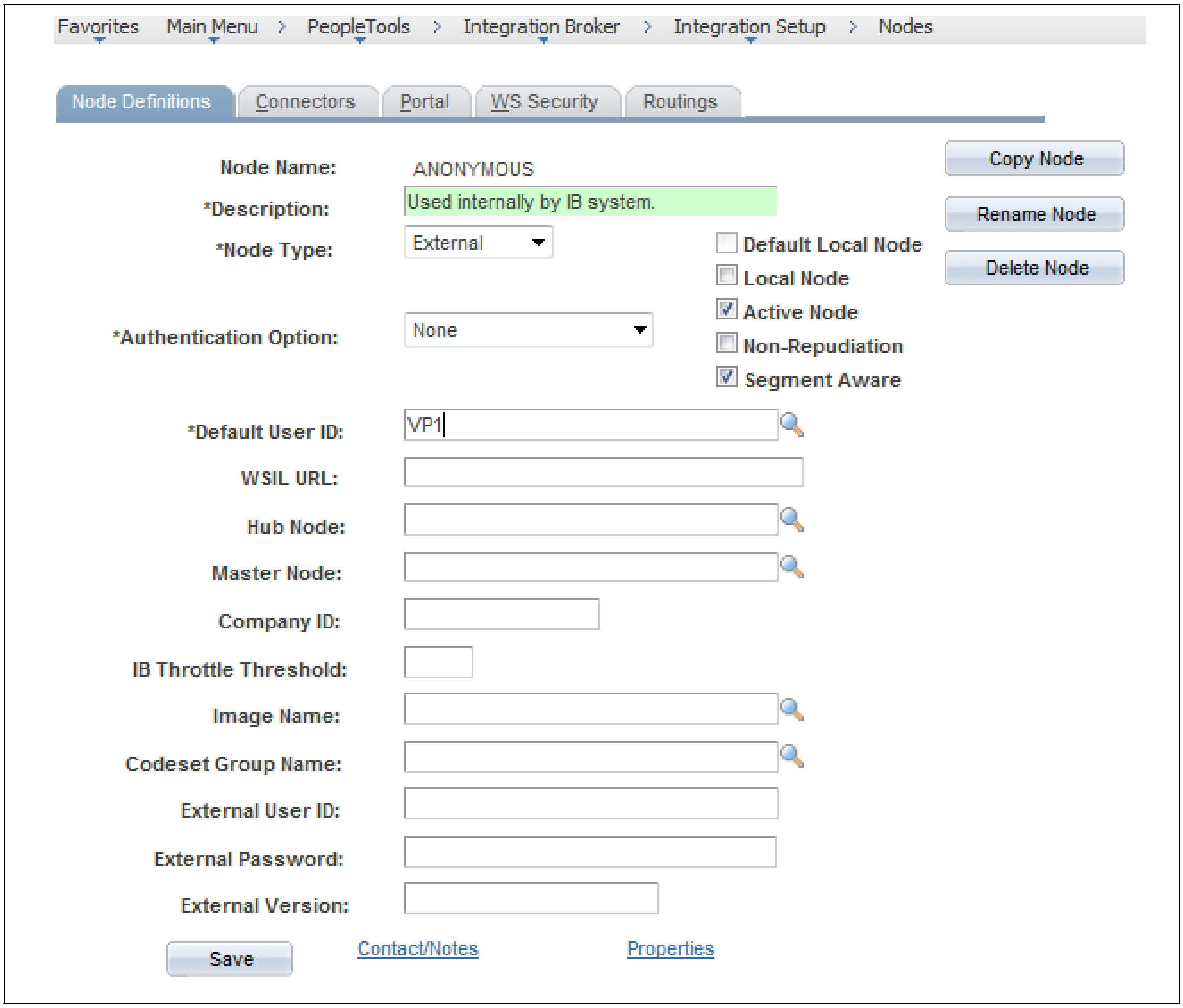
Configuring the ANONYMOUS Node With a Valid User

You must provide a valid PeopleSoft user for the ANONYMOUS node.

To configure the ANONYMOUS node:

1. Log in to your PeopleSoft application.
2. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for and select ANONYMOUS.

   The Node Definitions page appears, as shown in the following example:



Node Definitions page

3. On the Node Definitions page, in the Default User ID field, click the lookup icon to select a valid PeopleSoft user.

Note. This user does not need to be a Super User ID.

---

4. Click Save.

Task 22-5-2: Reviewing the Set Up of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker

The integration between PeopleSoft and the mobile device involves the use of service operations within the PeopleSoft Integration Broker. The following table lists the services that PeopleSoft Mobile Inventory Management uses, along with their corresponding description, task flow and component interface:

Services	Description	Used by Task Flows	Component Interface
MIN_ADJUSTMENT	Adjustments for Mobile	Adjustments	ADJUSTMENT_INV
MIN_ALT_TYPES_GET	Alternate Item Type for Mobile	All	N/A
MIN_BIN_TRANSFER	Bin to Bin Transfer for Mobile	Bin to Bin Transfer	N/A
MIN_CART_COUNT_ GET	Get Par Locations for Mobile	Par Count	CART_COUNT_INV
MIN_CART_COUNT_ GET	Get Par Locations for Mobile	Par Count Ad Hoc	CART_COUNT_INV
MIN_CART_COUNT_ SAVE	Save Par Locations for Mobile	Par Count	CART_COUNT_INV
MIN_CART_COUNT_ SAVE	Save Par Locations for Mobile	Par Count Ad Hoc	CART_COUNT_INV
MIN_COUNTING_ EVENT_VALIDATE	Inventory Counting Event Validation	Guided Count	N/A
MIN_COUNTING_ EVENT_VALIDATE	Inventory Counting Event Validation	Count By Item	N/A
MIN_COUNTING_ EVENT_VALIDATE	Inventory Counting Event Validation	Count By Location	N/A
MIN_COUNTING_ EVENT_VALIDATE	Inventory Counting Event Validation	Manual Count	N/A
MIN_COUNTING_ EVENT_GET	Inventory Counting Event Get	Guided Count	N/A
MIN_COUNTING_ EVENT_GET	Inventory Counting Event Get	Count By Item	N/A
MIN_COUNTING_ EVENT_GET	Inventory Counting Event Get	Count By Location	N/A
MIN_COUNTING_ EVENT_GET	Inventory Counting Event Get	Manual Count	N/A
MIN_COUNTING_ EVENT_SET	Inventory Counting Event Set	Guided Count	COUNT_INV_CI used by Guided Count, Count by Item and Count by Location.
MIN_COUNTING_ EVENT_SET	Inventory Counting Event Set	Count By Item	COUNT_INV_CI used by Guided Count, Count by Item and Count by Location.
MIN_COUNTING_ EVENT_SET	Inventory Counting Event Set	Count By Location	COUNT_INV_CI used by Guided Count, Count by Item and Count by Location.
MIN_COUNTING_ EVENT_SET	Inventory Counting Event Set	Manual Count	COUNT_INV_INF used by Manual Count.
MIN_EXPRESS_ISSUE	Express Issue for Mobile	Express Issue	EXPRESS_ISSUE_INV_CI
MIN_EXPRESS_ISSUE_ VALIDATE	Express Issue for Mobile Validation	Express Issue	N/A
MIN_ITEM_STK_INQ	Item Stock Inquiry for Mobile	Item Stock Inquiry	PUTAWAY_INQ_INV
MIN_LOOKUP_ GENERIC_GET	Generic Lookup for Mobile	All	N/A

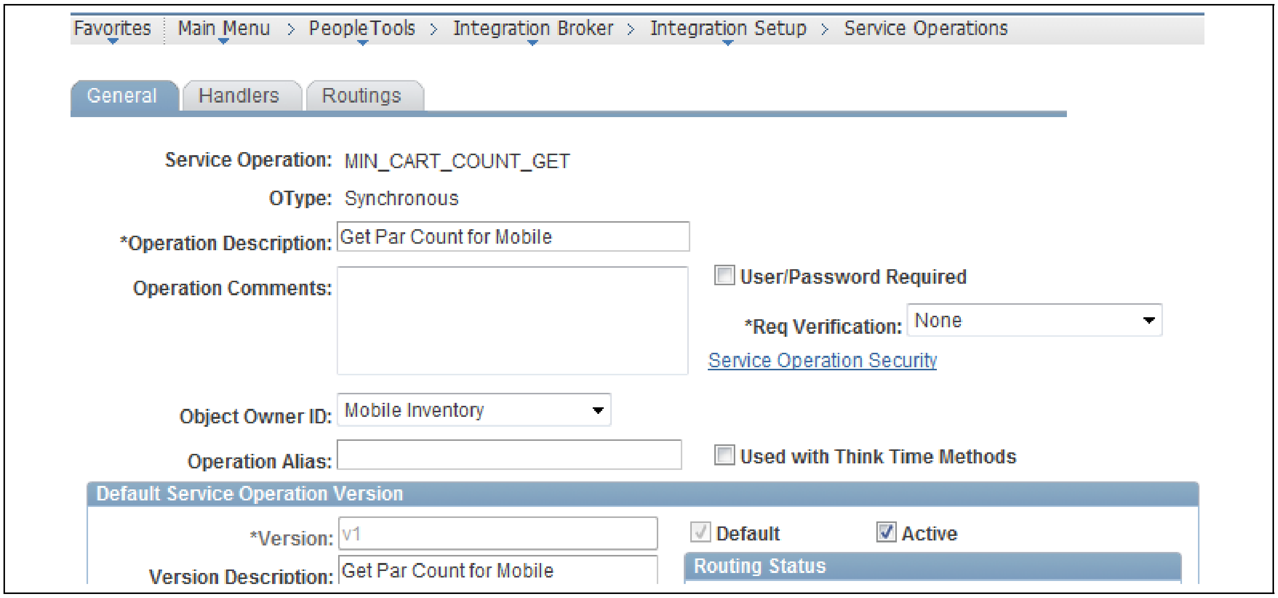
Services	Description	Used by Task Flows	Component Interface
MIN_MENU	Mobile Menu Service	All	N/A
MIN_NPRCPT_SAVE	Mobile Non-PO Receipt Service	Receiving	MIN_NPO_RECV_CI
MIN_NPRCPT_SAVE	Mobile Non-PO Receipt Service	Receiving Ad Hoc	MIN_NPO_RECV_CI
MIN_OPTIONS	Mobile Inventory Options	All	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Adjustments	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Bin to Bin Transfer	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Receiving PO	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Receiving Ad Hoc	N/A
MIN_RCPT_CNTR_GET	Mobile Receiving Get	Receiving PO	PO_RECEIPT_CI
MIN_RCPT_CNTR_SAVE	Mobile Receiving Save	Receiving PO	MIN_PO_RECV_CI
MIN_RECV_DELIVERY	Mobile Delivery Get	Delivery	RECV_DELIVERY_CI
MIN_RECV_DELIVERY_ SAVE	Mobile Delivery Save	Delivery	RECV_DELIVERY_CI
MIN_STCK_FEEDBK_ FIND	Stockroom Feedback Find	Stockroom Feedback	PUTAWAY_FEEDBK_ MBL
MIN_STCK_FEEDBK_ GET	Stockroom Feedback Get	Stockroom Feedback	PUTAWAY_FEEDBK_ MBL
MIN_STCK_FEEDBK_ SAVE	Stockroom Feedback Save	Stockroom Feedback	PUTAWAY_FEEDBK_ MBL

Note. Oracle delivers fully configured service operations for PeopleSoft Mobile Inventory Management. Therefore, the following steps are only required if any service operations are not active.

To activate the synchronous service operations for PeopleSoft Mobile Inventory Management, complete the following steps in the PeopleSoft Integration Broker for each service in the preceding table:

1. Activate the service operation:
   a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

      The Service Operations - General page appears, as shown in the following example:



Service Operations - General page

b. On the Service Operations - General page, in the Default Service Operation Version group box, select the *Active* check box for the applicable service operation version.

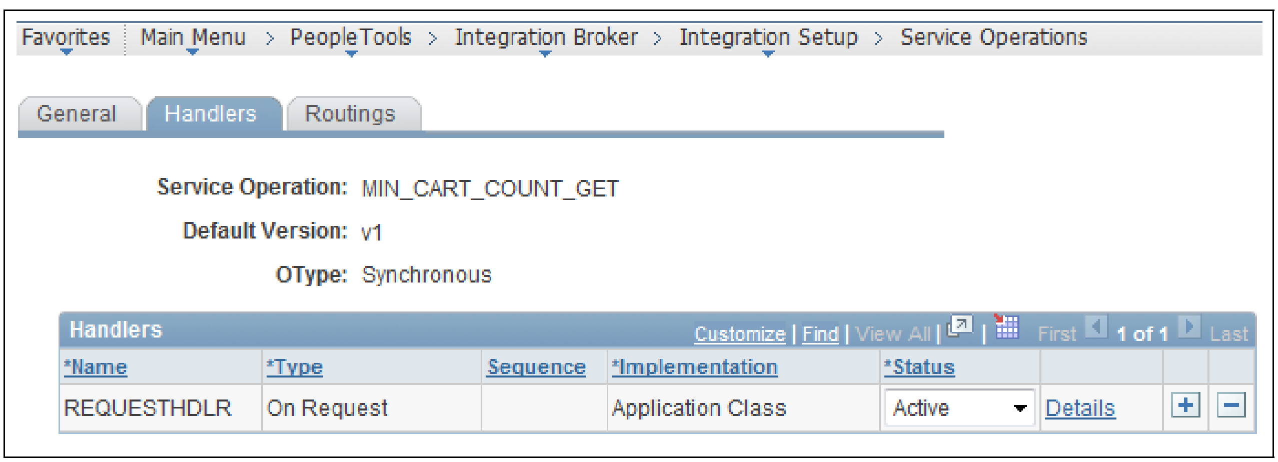
For example: *v1*

c. If the version that you desire is not the default version for the service operation, you must also activate the default version.

2. Activate the service operation handlers:

a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

The Service Operations - Handlers page appears, as shown in the following example:



Service Operations - Handlers page

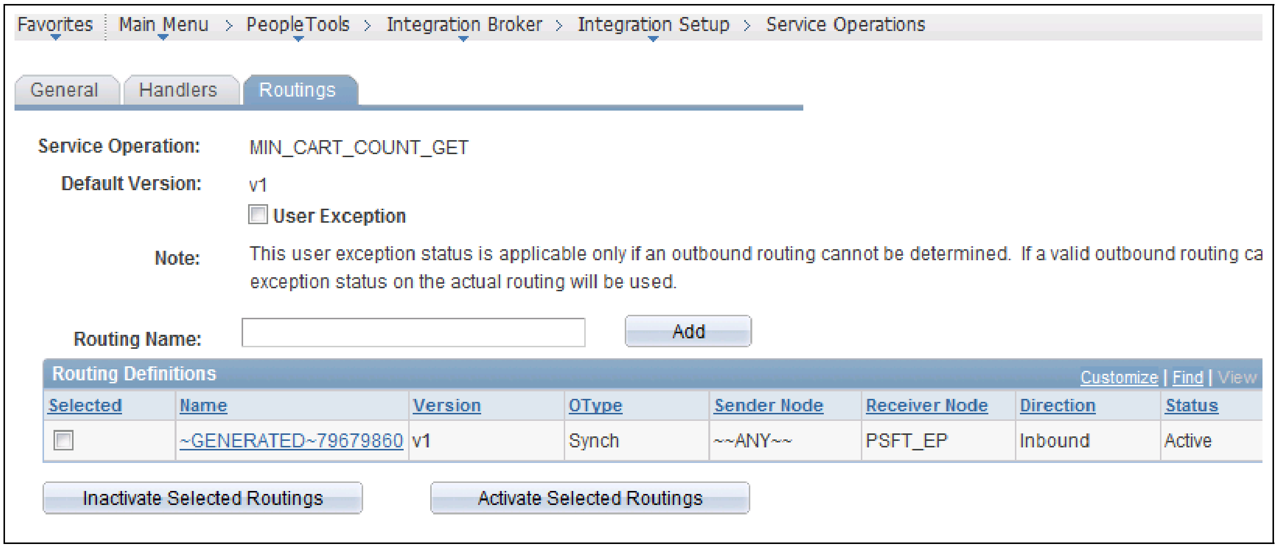
b. On the Service Operations - Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box for all handlers that the system requires.

c. For inbound synchronous service operations, activate the OnRequest handler.

3. Activate the service operation routings:

a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

The Service Operations - Routings page appears, as shown in the following example:



Service Operations - Routings page

b. On the Service Operations - Routings page, activate a routing definition for each node that sends or receives data.

   To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. You must activate at least one routing if the data is being sent in an XML format.

c. Activate an inbound routing to receive data into PeopleSoft.

See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook.*

Task 22-5-3: Granting Security to PeopleSoft Mobile Inventory Management Objects

Understanding How to Grant Security to PeopleSoft Mobile Inventory Management Objects

Use the Portal Security Sync from PeopleSoft Pure Internet Architecture to grant security to PeopleSoft Mobile Inventory Management 9.1 objects to any custom Roles or Permission Lists that you maintain. Oracle delivers the Roles and Permission Lists that are set up to run all transactions.

The following lists the Roles and Permission Lists that Oracle delivers:

- Roles
  - MIN Administrator — Gives Administrators full access to all Mobile pages.
  - MIN User — Gives User access to Mobile pages, but no Mobile setup pages.
- Permission Lists
  - EPMIN1000 — For use by MIN Administrator Role.
  - EPMIN1100 — For use by MIN User Role.

Granting Security to PeopleSoft Mobile Inventory Management Objects

To grant security to PeopleSoft Mobile Inventory Management Objects:

1. Select PeopleTools, Portal, Portal Security Sync.
2. Select Run Control ID PORTAL_CSS.

   If this run control ID is not already present, select the Add a new value tab and add this run control value.
3. Select the Delete invalid security check box.
4. Click Run.
5. Click OK.

Task 22-5-4: Rebooting the PeopleSoft Application Server

After you complete the PeopleSoft Mobile Inventory Management 9.1 installation, you must shut down the PeopleSoft Application server, clear the cache and then restart the server.

Task 22-5-5: Verifying PeopleSoft Integration Broker is Web Service Enabled for the PeopleSoft FSCM 9.1 Database

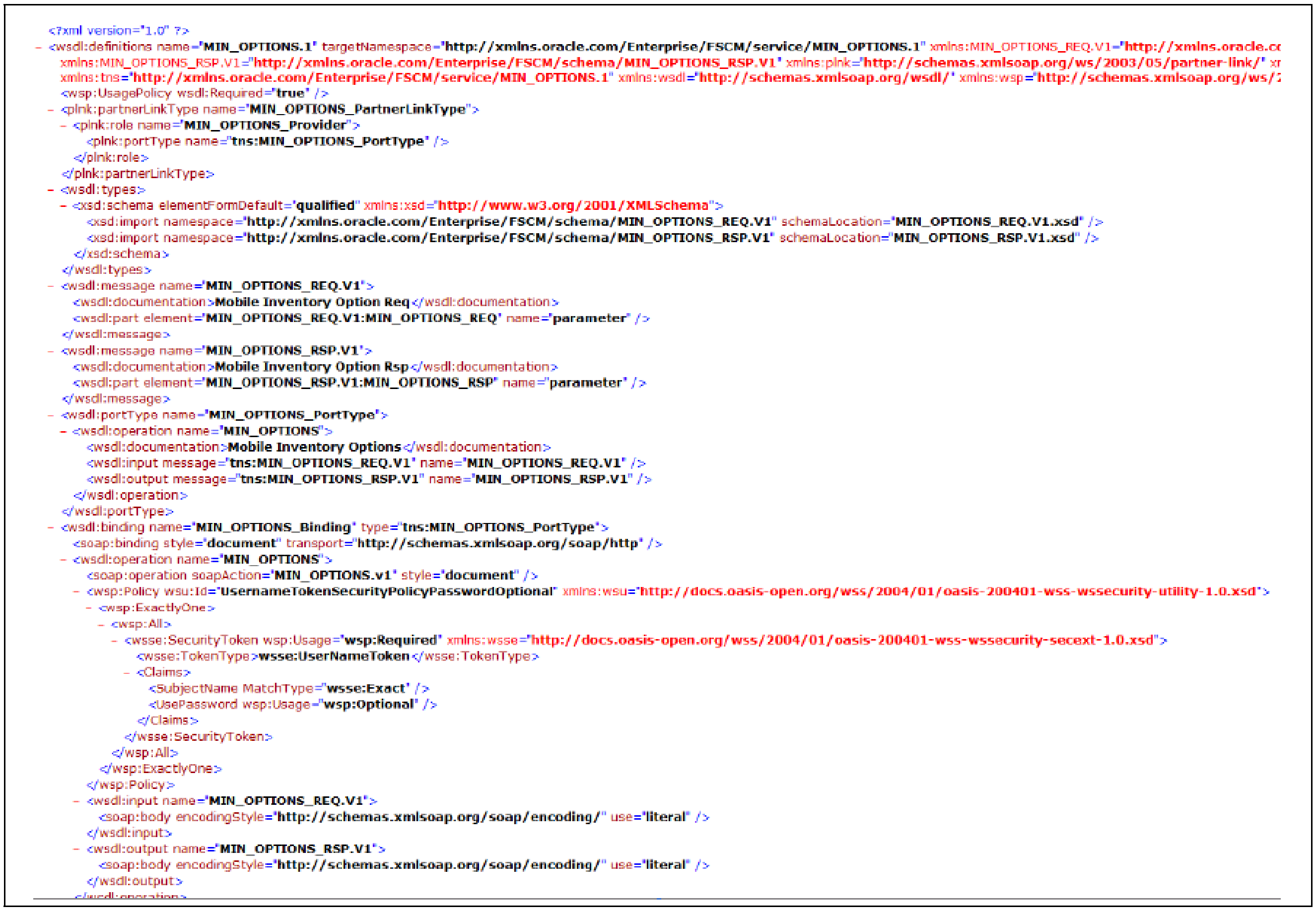
After you complete the PeopleSoft Mobile Inventory Management 9.1 installation process, verify that PeopleSoft Integration Broker is configured for Web Services. Web Services Description Language (WSDL) requires Web Services to communicate between PeopleSoft and the Mobile Inventory Web Server. Details on how to configure PeopleSoft Integration Broker and Web Services are in the PeopleSoft PeopleTools installation guide, available on My Oracle Support.

The following provides an example of a quick test for the PeopleSoft Integration Broker:

Quick Test for the PeopleSoft Integration Broker:

If the PeopleSoft Integration Broker is configured properly, the following URL should produce output similar to the example that follows:

http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP/MIN_OPTIONS.1.wsdl



```
<?xml version="1.0" ?>
- <wsdl:definitions name="MIN_OPTIONS.1" targetNamespace="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:MIN_OPTIONS_REQ.V1="http://xmlns.oracle.cc
    xmlns:MIN_OPTIONS_RSP.V1="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_RSP.V1" xmlns:plnk="http://schemas.xmlsoap.org/ws/2003/05/partner-link/" xr
    xmlns:tns="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/" xmlns:wsp="http://schemas.xmlsoap.org/ws/:
    <wsp:UsagePolicy wsdl:Required="true" />
  - <plnk:partnerLinkType name="MIN_OPTIONS_PartnerLinkType">
    - <plnk:role name="MIN_OPTIONS_Provider">
        <plnk:portType name="tns:MIN_OPTIONS_PortType" />
      </plnk:role>
    </plnk:partnerLinkType>
  - <wsdl:types>
    - <xsd:schema elementFormDefault="qualified" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
        <xsd:import namespace="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_REQ.V1" schemaLocation="MIN_OPTIONS_REQ.V1.xsd" />
        <xsd:import namespace="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_RSP.V1" schemaLocation="MIN_OPTIONS_RSP.V1.xsd" />
      </xsd:schema>
    </wsdl:types>
  - <wsdl:message name="MIN_OPTIONS_REQ.V1">
      <wsdl:documentation>Mobile Inventory Option Req</wsdl:documentation>
      <wsdl:part element="MIN_OPTIONS_REQ.V1:MIN_OPTIONS_REQ" name="parameter" />
    </wsdl:message>
  - <wsdl:message name="MIN_OPTIONS_RSP.V1">
      <wsdl:documentation>Mobile Inventory Option Rsp</wsdl:documentation>
      <wsdl:part element="MIN_OPTIONS_RSP.V1:MIN_OPTIONS_RSP" name="parameter" />
    </wsdl:message>
  - <wsdl:portType name="MIN_OPTIONS_PortType">
    - <wsdl:operation name="MIN_OPTIONS">
        <wsdl:documentation>Mobile Inventory Options</wsdl:documentation>
        <wsdl:input message="tns:MIN_OPTIONS_REQ.V1" name="MIN_OPTIONS_REQ.V1" />
        <wsdl:output message="tns:MIN_OPTIONS_RSP.V1" name="MIN_OPTIONS_RSP.V1" />
      </wsdl:operation>
    </wsdl:portType>
  - <wsdl:binding name="MIN_OPTIONS_Binding" type="tns:MIN_OPTIONS_PortType">
      <soap:binding style="document" transport="http://schemas.xmlsoap.org/soap/http" />
    - <wsdl:operation name="MIN_OPTIONS">
        <soap:operation soapAction="MIN_OPTIONS.v1" style="document" />
      - <wsp:Policy wsu:Id="UsernameTokenSecurityPolicyPasswordOptional" xmlns:wsu="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-utility-1.0.xsd">
        - <wsp:ExactlyOne>
          - <wsp:All>
            - <wsse:SecurityToken wsp:Usage="wsp:Required" xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
                <wsse:TokenType>wsse:UserNameToken</wsse:TokenType>
              - <Claims>
                  <SubjectName MatchType="wsse:Exact" />
                  <UsePassword wsp:Usage="wsp:Optional" />
                </Claims>
              </wsse:SecurityToken>
            </wsp:All>
          </wsp:ExactlyOne>
        </wsp:Policy>
      - <wsdl:input name="MIN_OPTIONS_REQ.V1">
          <soap:body encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" use="literal" />
        </wsdl:input>
      - <wsdl:output name="MIN_OPTIONS_RSP.V1">
          <soap:body encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" use="literal" />
        </wsdl:output>
```

Example of URL output produced from properly configured PeopleSoft Integration Broker

See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook.*

Task 22-5-6: Setting Installation Options

Oracle recommends that you update the PeopleSoft Mobile Inventory Management indicator on the Installation page.

To set installation options:

1. From the Main menu, select Set Up Financials/Supply Chain, Install, Installation Options.
2. On the Products page, click the Mobile Inventory link to indicate that Mobile Inventory Management is installed.
3. Click Save.

   If it is necessary to make any changes to the Installation Table, an informational message appears stating that you must log off and log back on to all clients and application servers for the changes to take effect. To comply, log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft FSCM for your changes to take effect.

For more information and to set user preferences, see the *PeopleSoft Mobile Inventory Management 9.1 PeopleBook*, available on My Oracle Support.

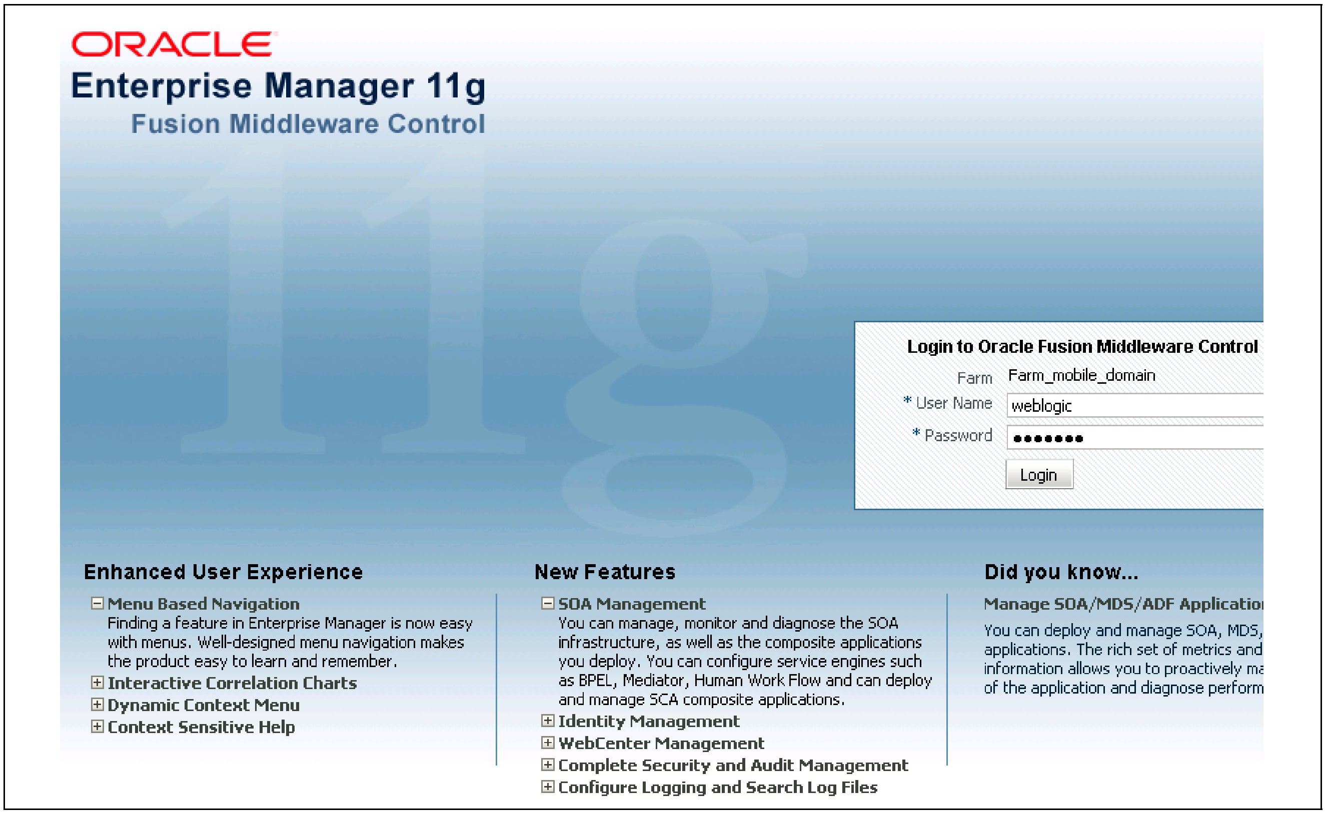
Task 22-6: Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server

To deploy the mobile application to Oracle Application Developer for an Oracle WebLogic Server:

1. Start the Oracle Enterprise Manager.

   For example: *http://localhost:7001/em*

   The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Login page

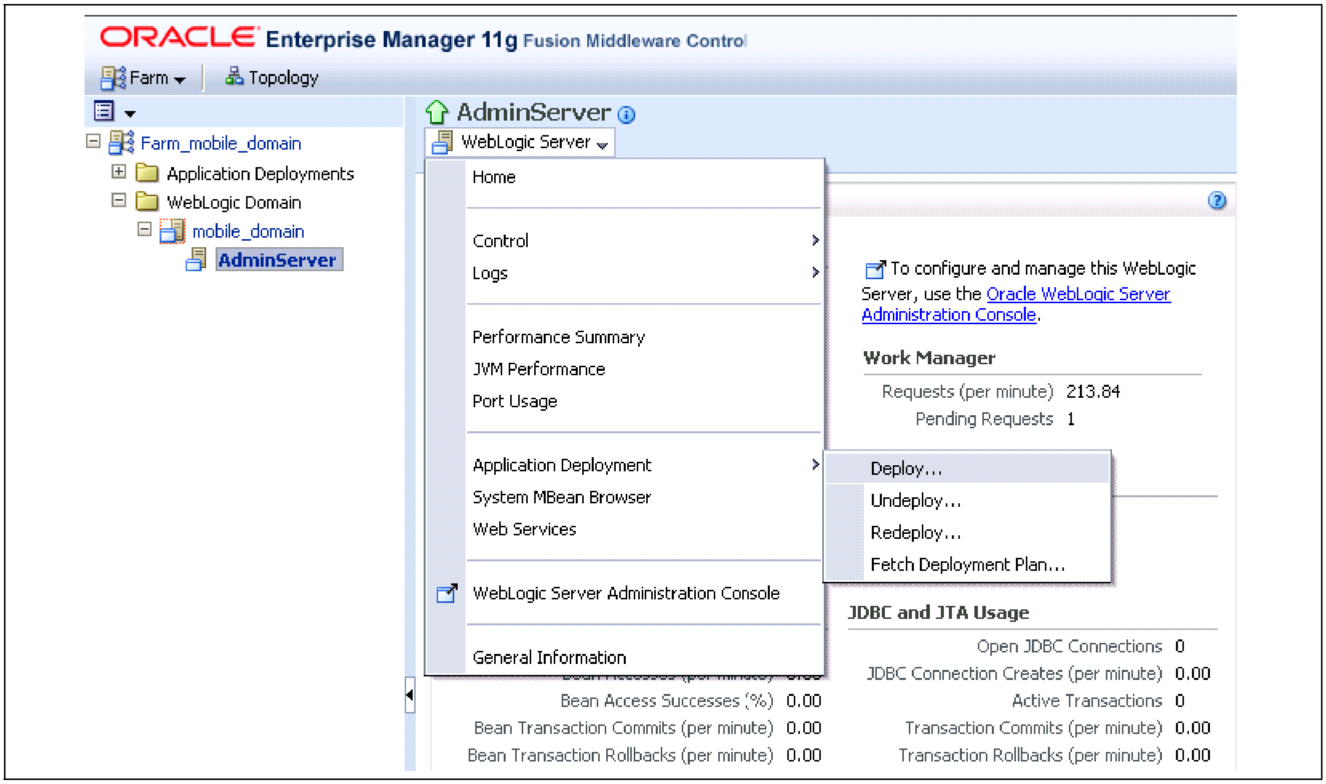
2. On the Login page, enter your user name and password and then click Login.

   The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears.

3. In the Farm tree under WebLogic Domain, select *mobile_domain*, and then select the server where you want the application to deploy.

   For example: *AdminServer*

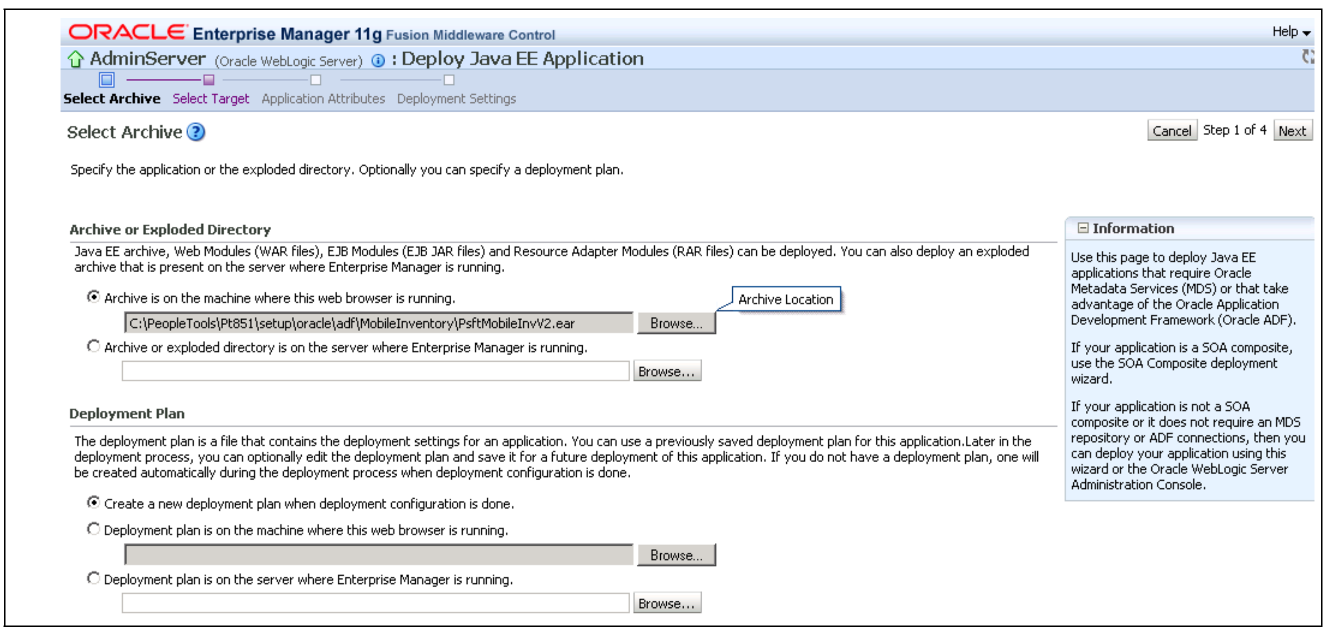
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree

4. Select the WebLogic Domain drop-down list menu, and then select Application Deployment, Deploy.

   The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Archive page appears, as shown in the following example:



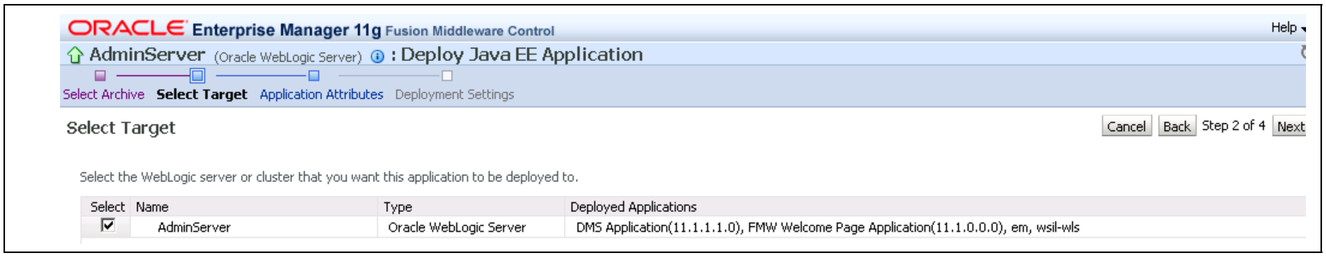
Oracle Enterprise Manager 11g Fusion Middleware Control - Select Archive page

5. On the Select Archive page, click Browse to select the EAR file (either method works), and then click Next.

   The EAR file is in <PS_APP_HOME>\setup\oracle\adf\MobileInventory directory.

For example: c:\pt852\setup\oracle\adf\MobileInventory\PsftMobileInv.ear

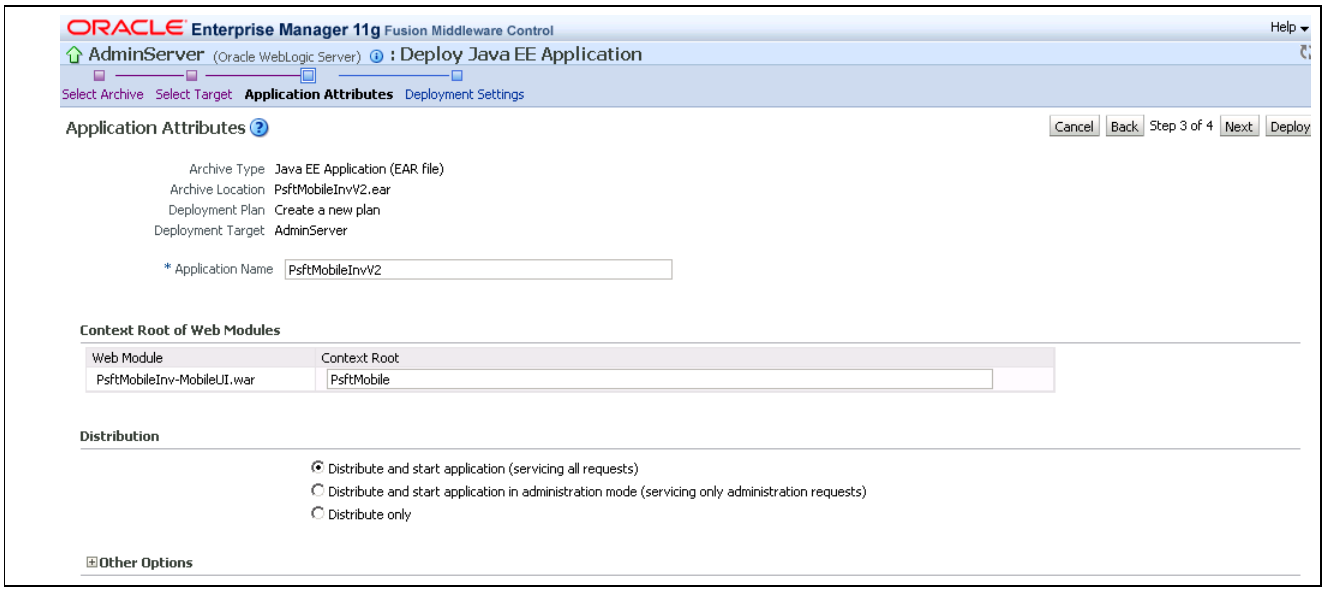
The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Target page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Select Target pag

6. On the Select Target page, select your Target Server and click Next.

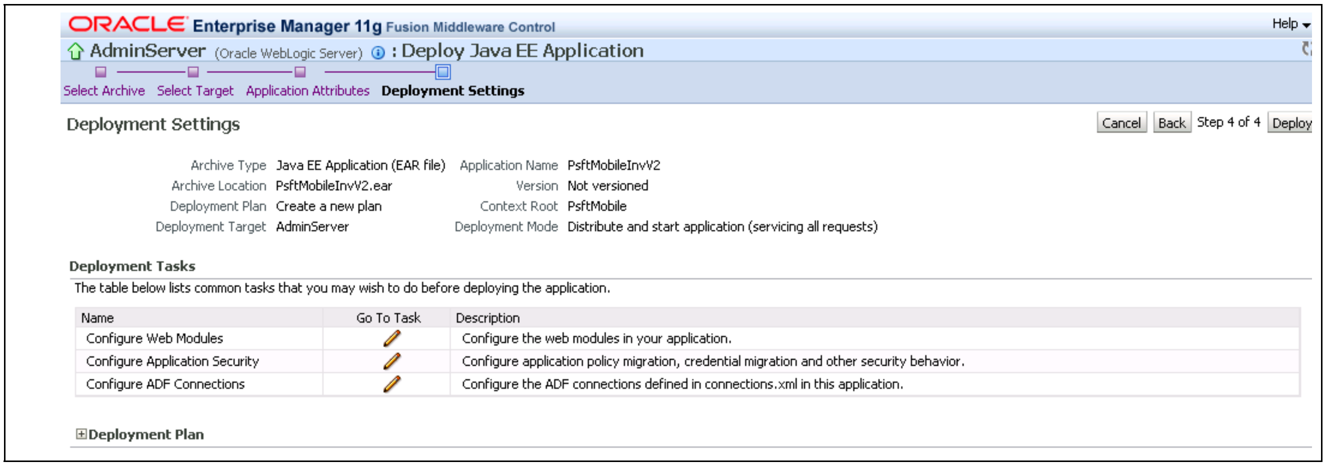
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Application Attributes page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Application Attributes page

7. On the Application Attributes page, click Next.

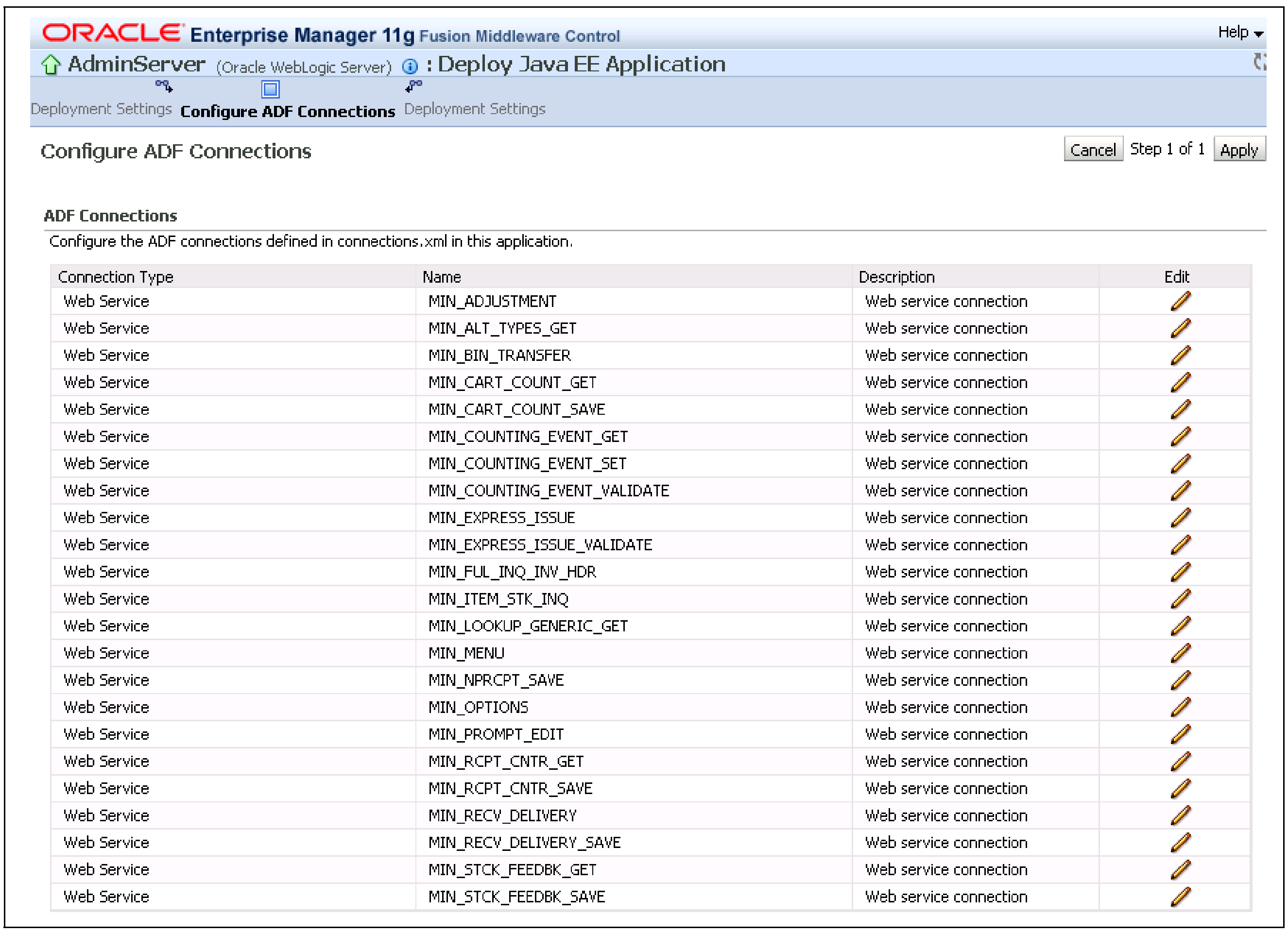
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Settings page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Settings page

8. On the Deployment Settings page, click the Go to Task (pencil/edit icon) to select the Configure ADF (Application Developer Framework) Connections option to change the WSDL Endpoint URLs.

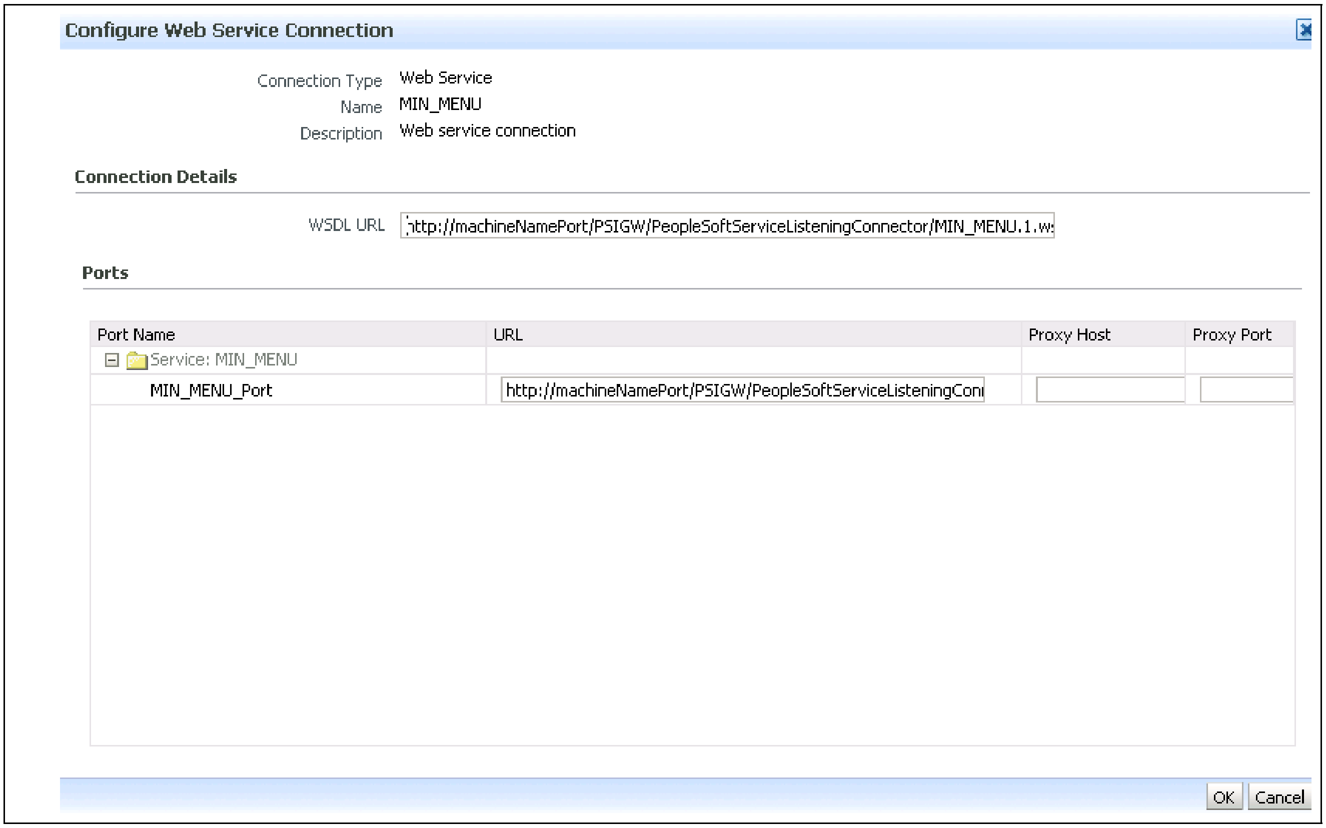
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page

9. On the Configure ADF Connections page, edit *each* Web Service and change to the appropriate PeopleSoft server.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Configure Web Service Connection page appears, as shown in the following example:



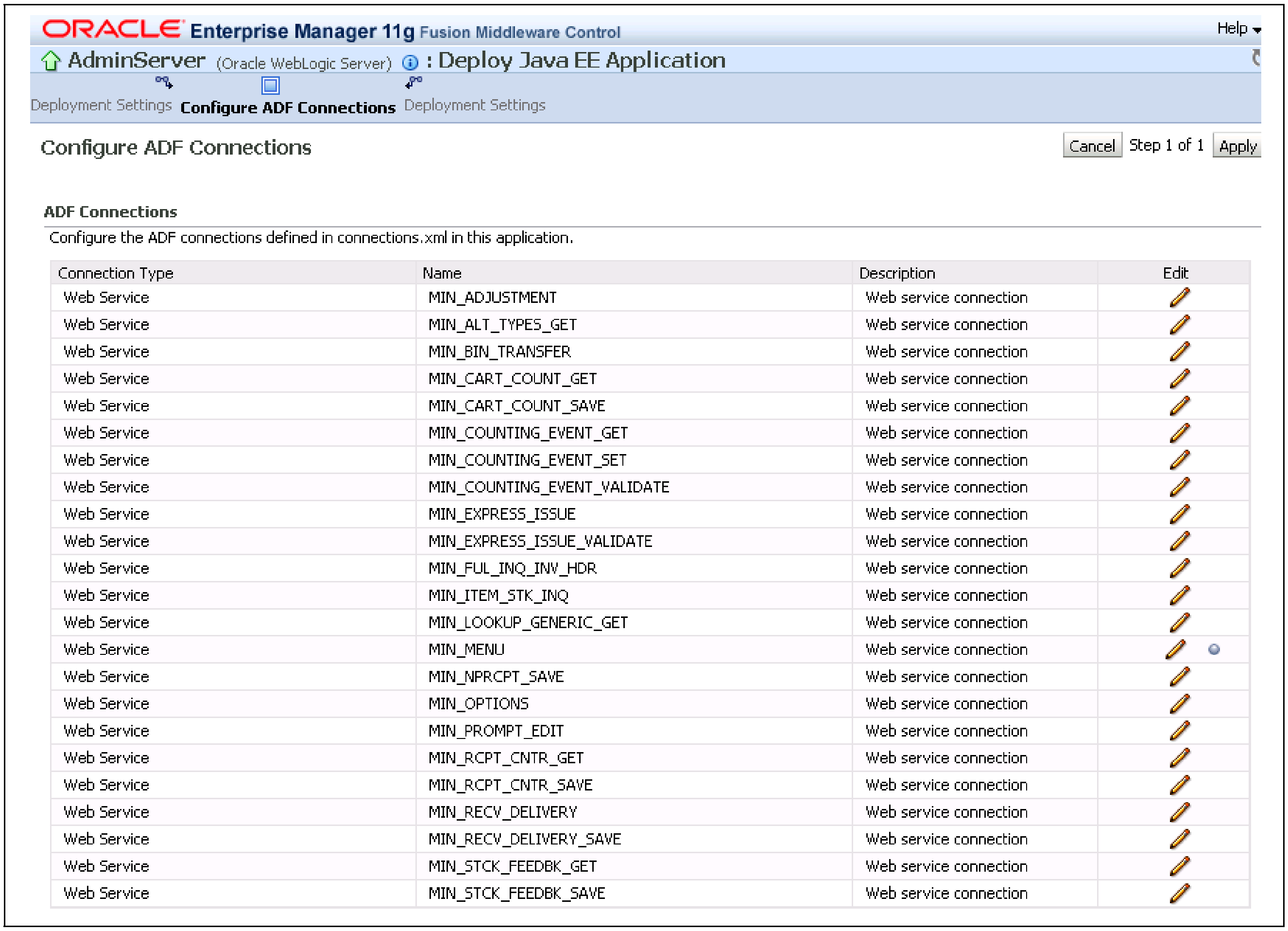
Oracle Enterprise Manager 11g Fusion Middleware Control - Configure Web Service Connection page

10. On the Configure Web Service Connection page, change both the WSDL URL and the URL in the Ports section.

Important! For both URLs, you must replace “machineNamePort” with your Gateway URL. In addition, if you changed the name of your LocalNode, you must change/add “PSFT_EP” to the new local node name. PSFT_EP is the default name for the local node.

For example: http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP

A green dot displays next to any Web Service that has been modified, as shown in the following example. After you perform this step, all of the Web Services should display green dots (repeat for all connections).

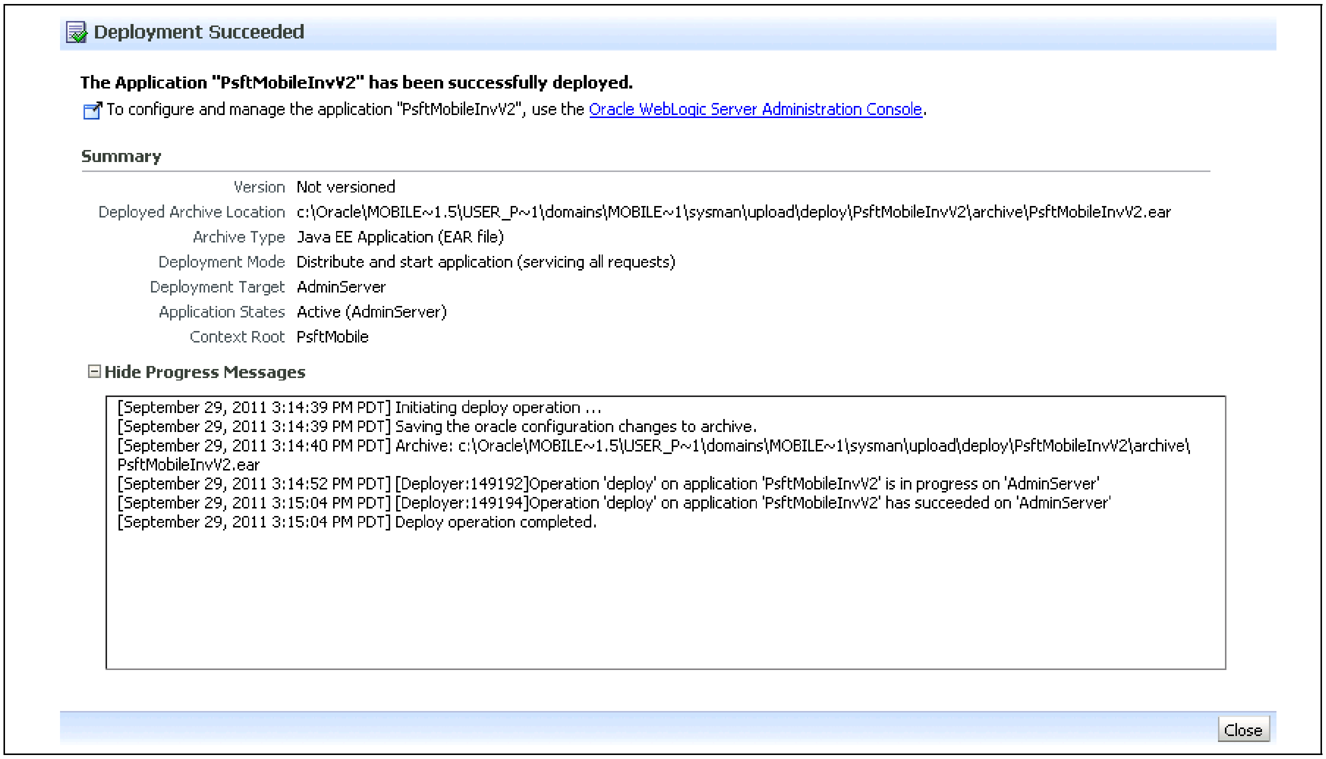


Connection Type	Name	Description	Edit
Web Service	MIN_ADJUSTMENT	Web service connection	
Web Service	MIN_ALT_TYPES_GET	Web service connection	
Web Service	MIN_BIN_TRANSFER	Web service connection	
Web Service	MIN_CART_COUNT_GET	Web service connection	
Web Service	MIN_CART_COUNT_SAVE	Web service connection	
Web Service	MIN_COUNTING_EVENT_GET	Web service connection	
Web Service	MIN_COUNTING_EVENT_SET	Web service connection	
Web Service	MIN_COUNTING_EVENT_VALIDATE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE_VALIDATE	Web service connection	
Web Service	MIN_FUL_INQ_INV_HDR	Web service connection	
Web Service	MIN_ITEM_STK_INQ	Web service connection	
Web Service	MIN_LOOKUP_GENERIC_GET	Web service connection	
Web Service	MIN_MENU	Web service connection	
Web Service	MIN_NPRCPT_SAVE	Web service connection	
Web Service	MIN_OPTIONS	Web service connection	
Web Service	MIN_PROMPT_EDIT	Web service connection	
Web Service	MIN_RCPT_CNTR_GET	Web service connection	
Web Service	MIN_RCPT_CNTR_SAVE	Web service connection	
Web Service	MIN_RECV_DELIVERY	Web service connection	
Web Service	MIN_RECV_DELIVERY_SAVE	Web service connection	
Web Service	MIN_STCK_FEEDBK_GET	Web service connection	
Web Service	MIN_STCK_FEEDBK_SAVE	Web service connection	

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page

11. When you are done, click the Apply button, and then click the Deploy button.

    The Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Succeeded page appears, as shown in the following example:



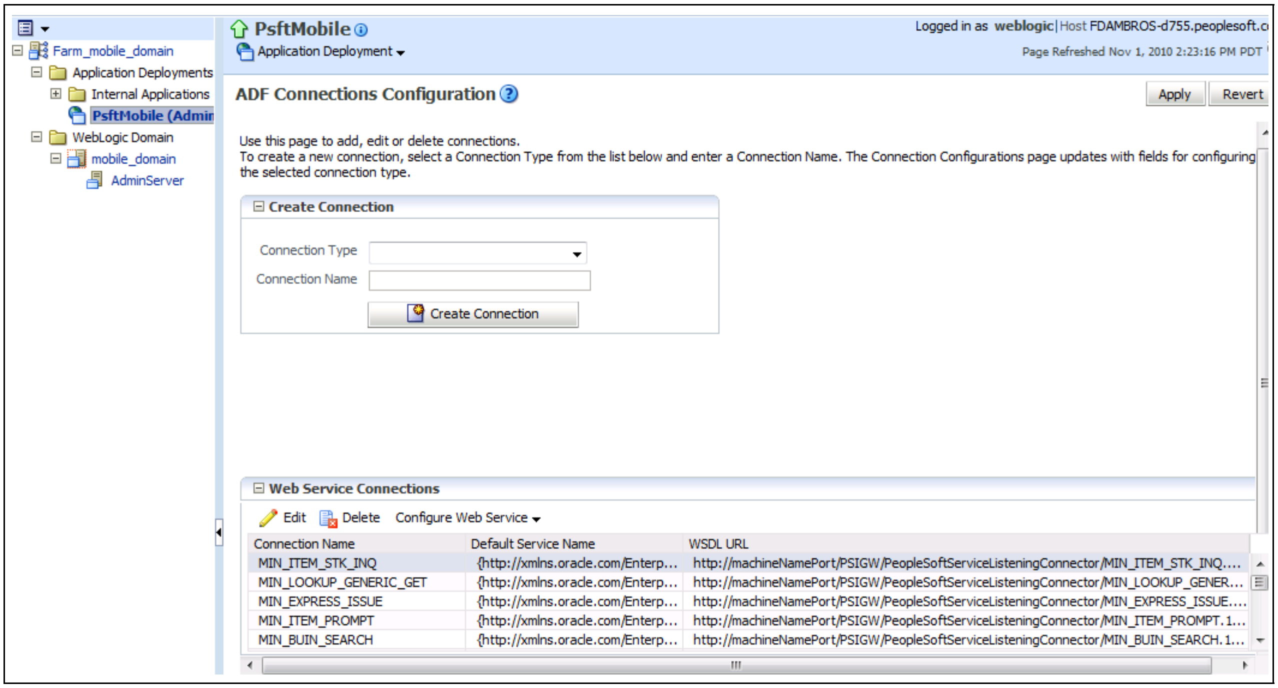
Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Succeeded Summary page

When you complete the deployment correctly, the message "The application PSFTMobile has been successfully Deployed" appears on the screen.

12. Click the Close button.
13. Stop and restart the WebServer.
14. Verify the ADF connections *(Optional)*.

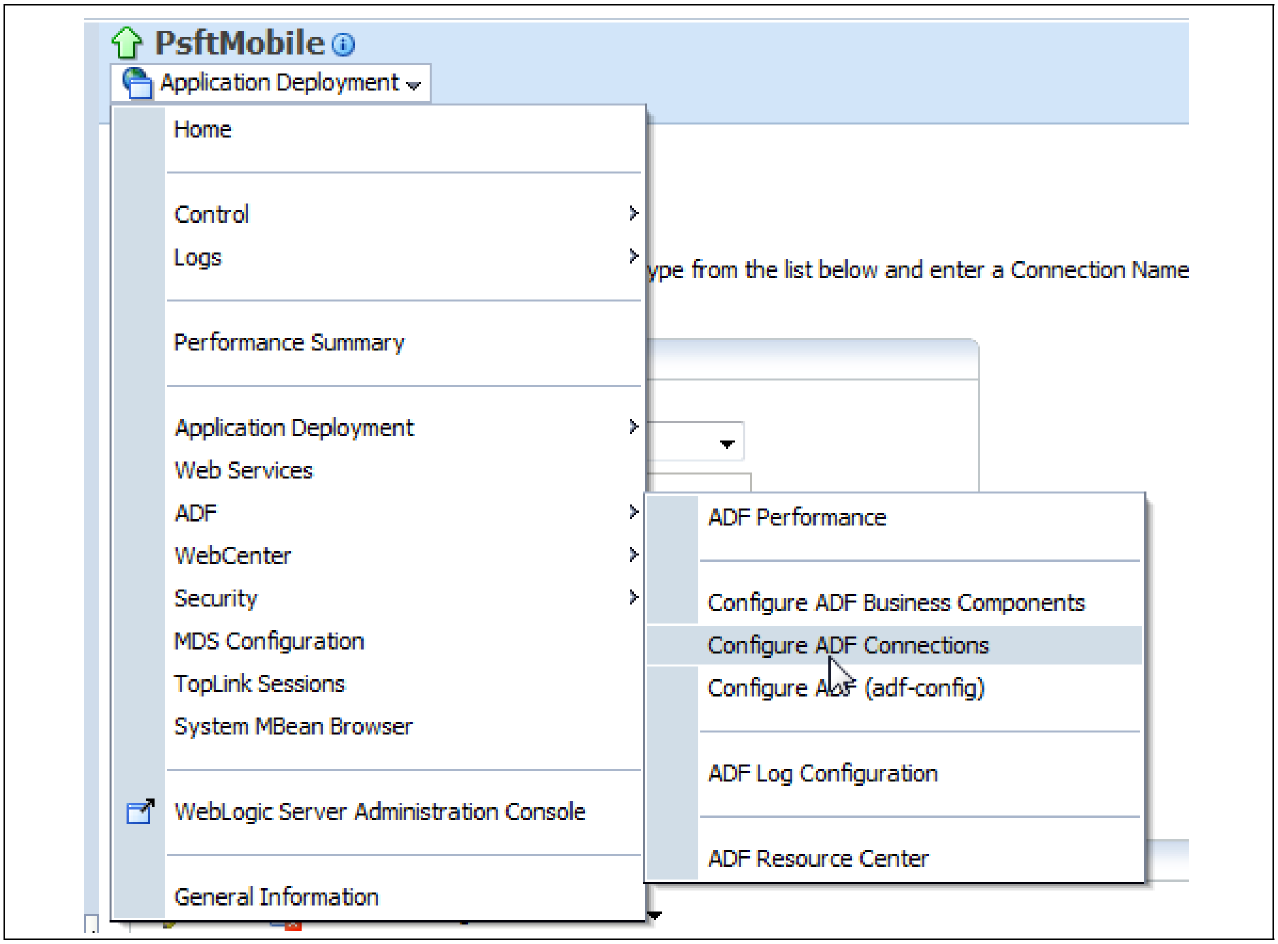
    You can use the Oracle Enterprise Manager to access and view the ADF connections that you used during deployment as follows:

    a. From the Application Deployment tree in the left pane, select PsftMobile.
    b. When you select PsftMobile, the Application Development drop-down list menu becomes available in the right pane.



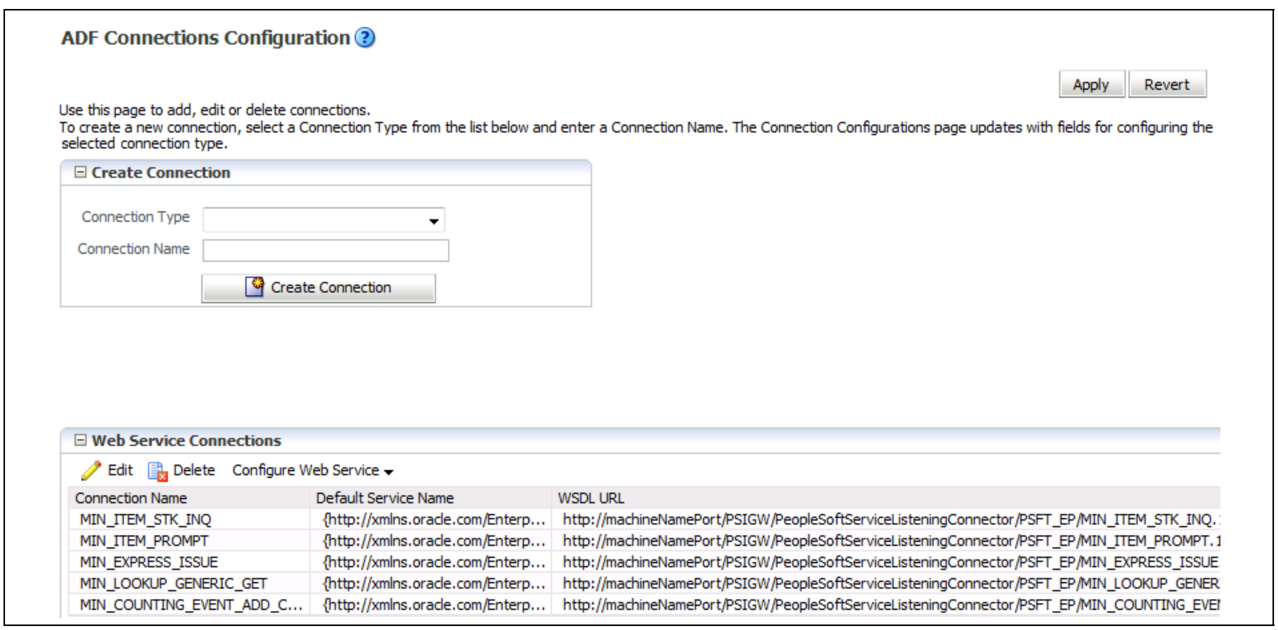
Oracle Enterprise Manager - PsftMobile: Application Deployment tree page

c. From the Application Development drop-down list menu, select ADF, Configure ADF Connections, as shown in the following example:



Oracle Enterprise Manager menu navigation

The Oracle Enterprise Manager - Application Deployment: ADF Connections Configuration page appears, as shown in the following example:



Oracle Enterprise Manager - Application Deployment: ADF Connections Configuration page

d. Review or edit the connections.

Highlight a connection, then click the pencil/edit icon to edit that connection.

15. To test deployment, login to the mobile application from a desktop browser.

For example: *http://localhost:7001/PsftMobile/faces/Login*

Note. For more details and instructions on how to configure mobile devices for PeopleSoft Mobile Inventory Management and other implementation instructions, see the *PeopleSoft Mobile Inventory Management 9.1 PeopleBook*, available on My Oracle Support.

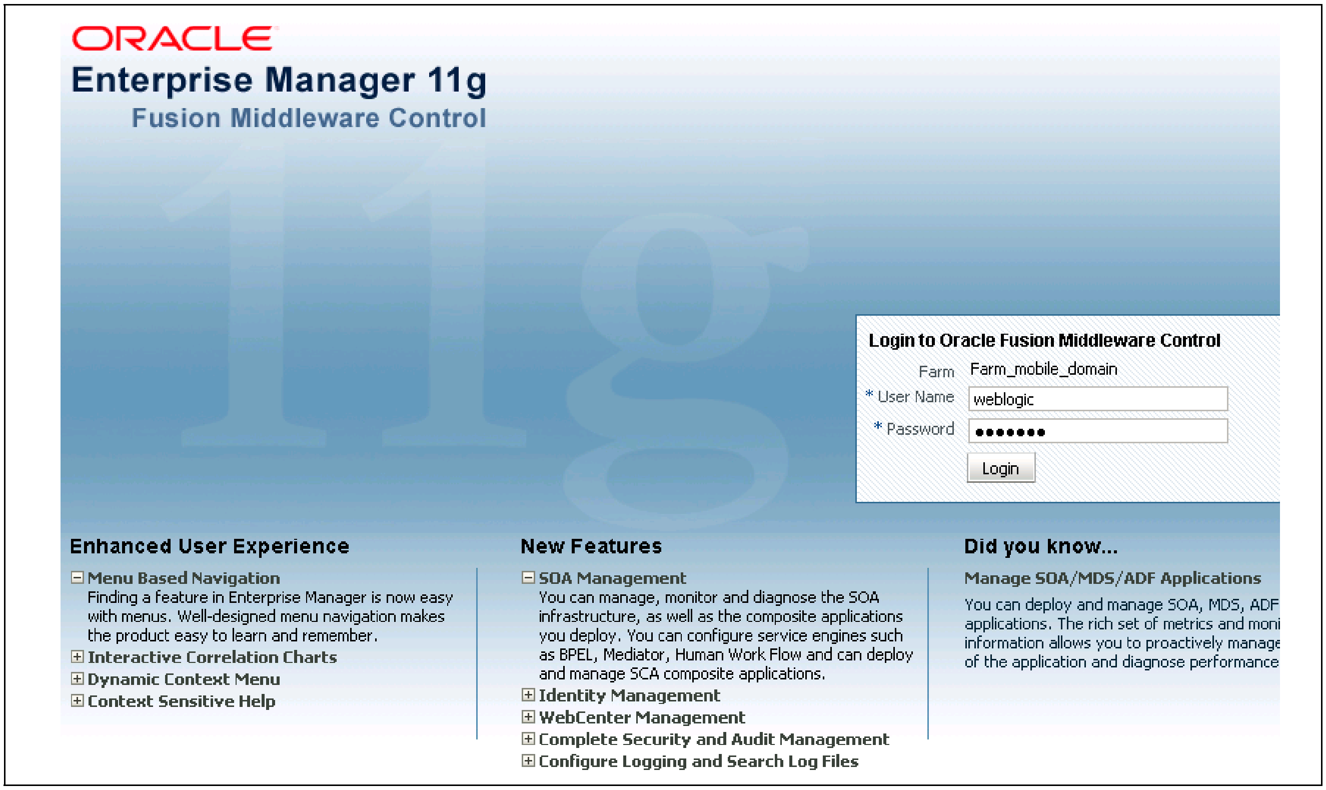
Task 22-7: Undeploying the Mobile Application

To undeploy the mobile application:

1. Start the Oracle Enterprise Manager.

   The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears, as shown in the following example:

2. On the Login page, enter your user name and password. Click Login.

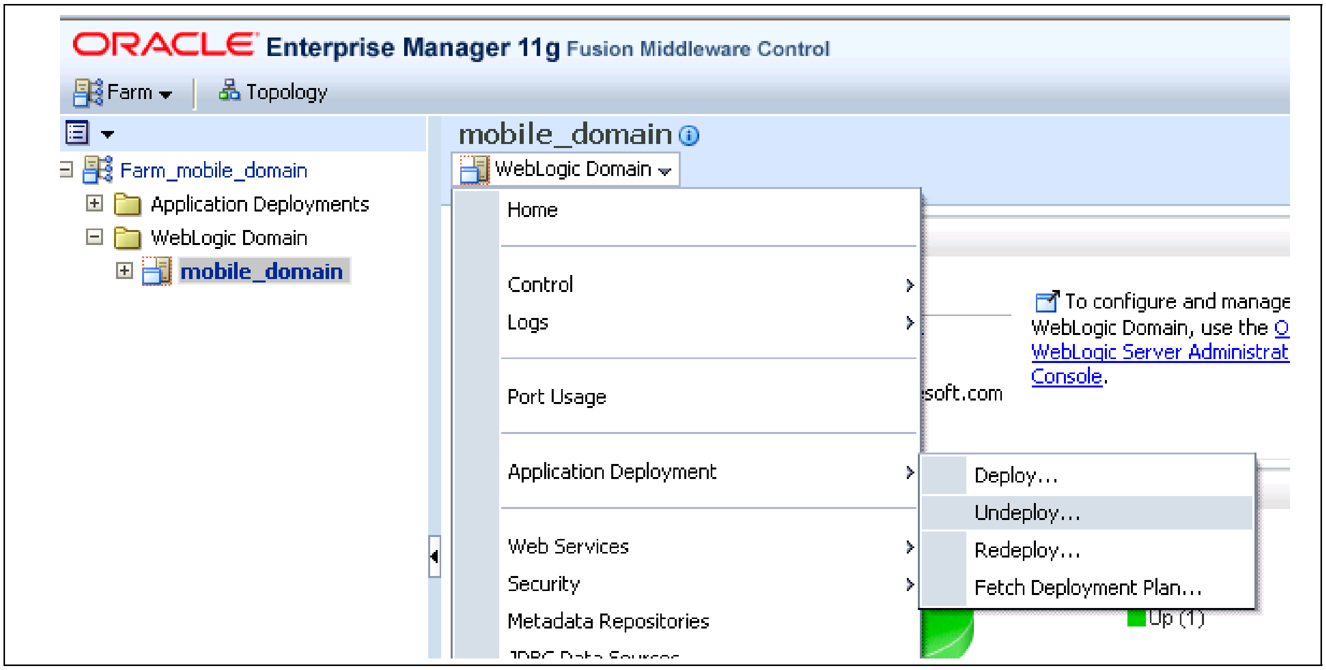


Oracle Enterprise Manager 11g Fusion Middleware Control - Login page

3. In the Farm tree under WebLogic Domain, select *mobile_domain*, and then select the server where you want the application to deploy.

   For example: *AdminServer*

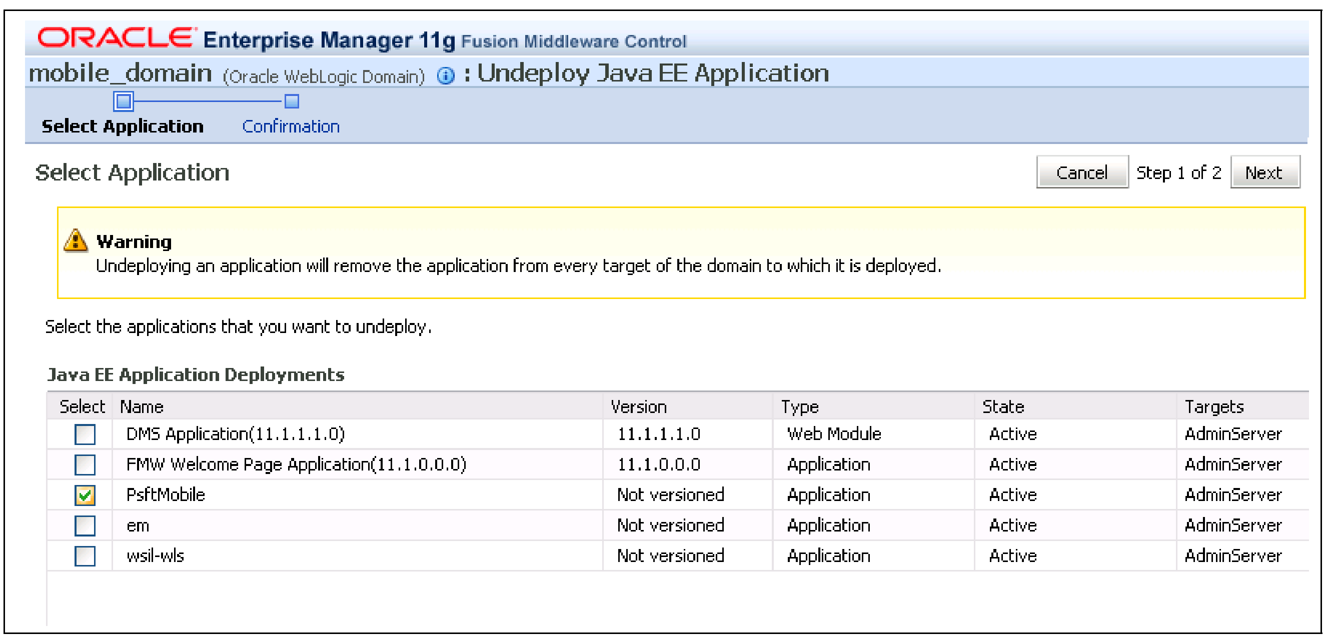
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm tree page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Farm tree

4. On the Farm Tree page, under the Server Name, select the WebLogic Server drop-down list menu, and then select Application Deployment, Undeploy.

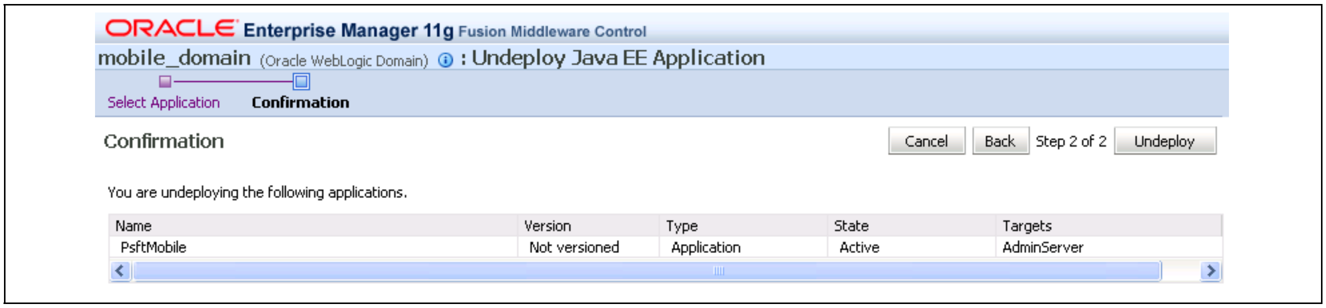
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Application page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Select Application page

5. On the Select Application page, select Application PsftMobile and click Next.

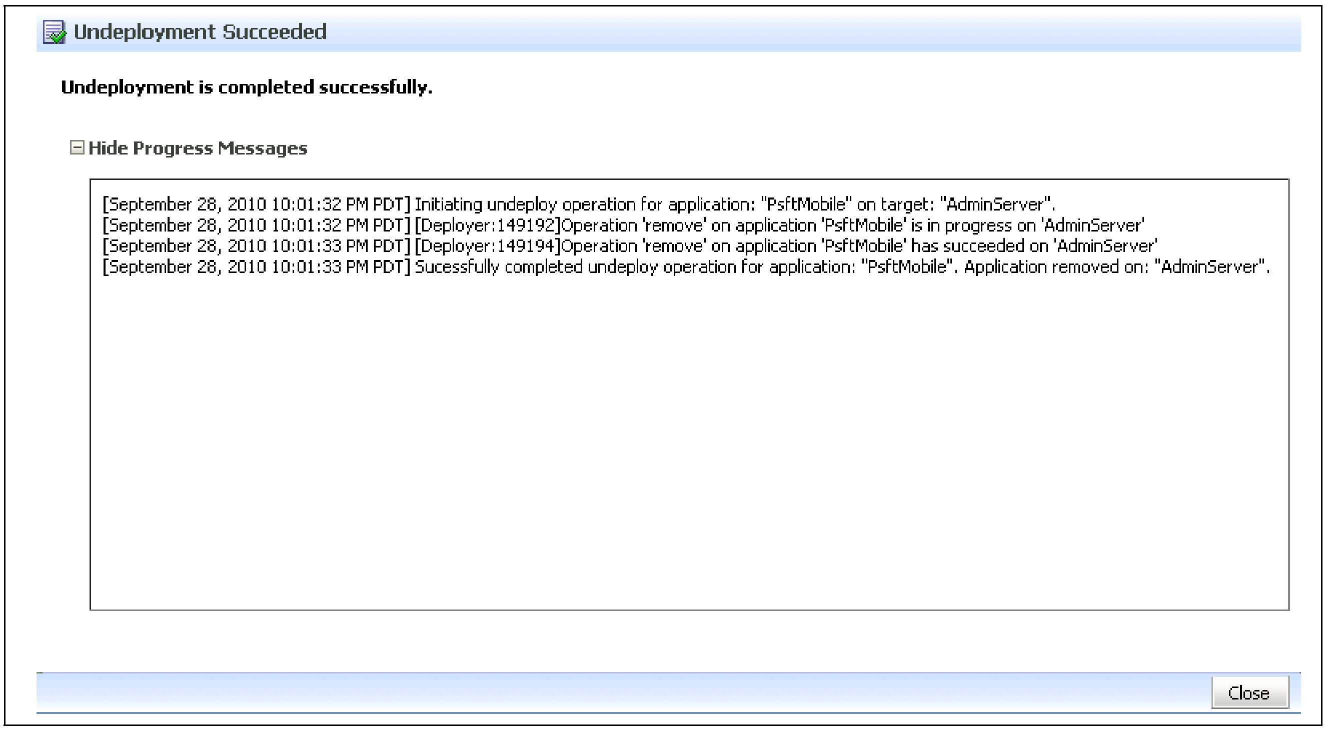
   The Oracle Enterprise Manager 11g Fusion Middleware Control - Confirmation page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Confirmation page

6. On the Confirmation page, click the Undeploy button.

   The Oracle Enterprise Manager 11g Fusion Middleware Control - Undeployment Succeeded page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Undeployment Succeeded page

7. Deploy the new EAR file by following the instructions in the task titled *"Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server."*

8. Restart the Oracle WebLogic Server.

CHAPTER 23

Configuring WS-Security for PeopleSoft Mobile Inventory Management

This chapter discusses:

- Understanding WS-Security
- Prerequisites
- Understanding the Configuration Process
- Configuring WS-Security for PeopleSoft Mobile Inventory Management

Understanding WS-Security

The PeopleSoft Mobile Inventory Management server communicates to the PeopleSoft Gateway using exposed Web Services from the PeopleSoft system. Generic installations do not secure these web services. It is acceptable for development and testing environments to use a generic installation. However, for a production system, this could pose a security risk. It is up to each installation team to determine if and how they plan to secure the web services that the PeopleSoft Mobile Inventory Management application uses. The application can run with or without applying WS-Security to the web service calls.

This chapter provides a *sample* installation of WS-Security using Security Assertion Markup Language (SAML). SAML is an XML-based open standard for communicating authentication and authorization data between secure domains and is certified with PeopleSoft PeopleTools 8.52.02 or higher.

This installation chapter does not cover the many options and alternatives available to implement WS-Security. Token encryption, SSL and non-SAML based WS-Security are options that you can add or substitute at your installation site as alternatives. To learn more about these alternatives:

See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook.*

Note. Oracle does not support a username token with clear text name and password when using the PeopleSoft Mobile Inventory Management application. Implementing WS-Security requires an x509 certificate to establish identity.

Prerequisites

Before you begin, ensure that you meet the following requirements:

- Installation and testing of the PeopleSoft 9.1 Mobile Inventory Management application is complete.

  You should not apply WS-Security to an unvalidated system.
- Administrative access to the PeopleSoft Mobile Inventory Management server.

- Administrative access to the PeopleSoft Web server.
- A PeopleSoft User ID that has permission to update security configuration information.
- An x.509 and root certificate from a trusted certificate authority.

Note. The steps in this installation chapter generate a self validating certificate, instead of a trusted certificate. Oracle does not recommend that you secure your production system with generated self-signed certificates. You should obtain an x.509 and root certificate from a trusted certificate authority.

- Download of the Oracle Repository Creation Utility is complete.

  To perform the WS-Security tasks in this chapter, you must use the Oracle Repository Creation Utility.

  To access the Oracle Repository Creation Utility (RCU), access the Oracle Technology Network at *http://www.oracle.com/technetwork/index.html*, select Downloads, SOA Suite, and then in the Oracle SOA Suite 11g Installations section (on that page) expand the “Prerequisites & Recommended Install Process” section and download the RCU.

Important! The Oracle Repository Creation Utility (RCU) must be run prior to installing the Oracle Web Service Manager (OWSM).

Understanding the Configuration Process

Several tasks are necessary to configure WS-Security for the PeopleSoft Mobile Inventory Management application. There may be dependencies between the steps. Therefore, Oracle recommends that you run the tasks in this chapter in the following order:

Note. The steps that follow detail the necessary tasks in the correct order.

---

1. Run the Oracle Repository Creation Utility (RCU) to create a metadata repository.

   Oracle Web Service Manager (OWSM) uses this repository to secure policies.
2. Install the Oracle Web Service Manager (OWSM), a prerequisite application that is part of Oracle Fusion Middleware.

   Using WS-Security client policies requires that you install OWSM on the PeopleSoft Mobile Inventory Management web server.

   WS-Security requires OWSM. The installation instructions for OWSM are only available in this chapter.
3. Configure the certificates between the Mobile server and the PeopleSoft server.
4. Create the keystore and credential store on the Mobile server.
5. Add the SAML definition information to the PeopleSoft system so that the system can validate and enable the identity of the Mobile server through WS-Security settings.

   Optionally, you can set policies on web services so that they cannot be called without the appropriate ws-security.
6. Update the connections.xml to enforce security policies.

   Oracle delivers the connections.xml file with the PeopleSoft Mobile Inventory Management application.

Task 23-1: Configuring WS-Security for PeopleSoft Mobile Inventory Management

This section discusses:

- Running the Oracle Repository Creation Utility
- Installing the Oracle Web Service Manager
- Configuring the Certificates
- Creating and Configuring the Keystore and Credential Store
- Adding the SAML Definition Information to the PeopleSoft System
- Updating the connections.xml to Enforce Security Policies

Important! There may be dependencies between the tasks necessary to configure WS-Security for the PeopleSoft Mobile Inventory Management application. Oracle recommends that you run the following tasks in the order provided.

Task 23-1-1: Running the Oracle Repository Creation Utility

You must run the Oracle Repository Creation Utility (RCU) prior to installing the Oracle Web Service Manager (OWSM).

To download and run the Oracle RCU:

1. Download the Oracle Repository Creation Utility (RCU) from the Oracle Technology Network.

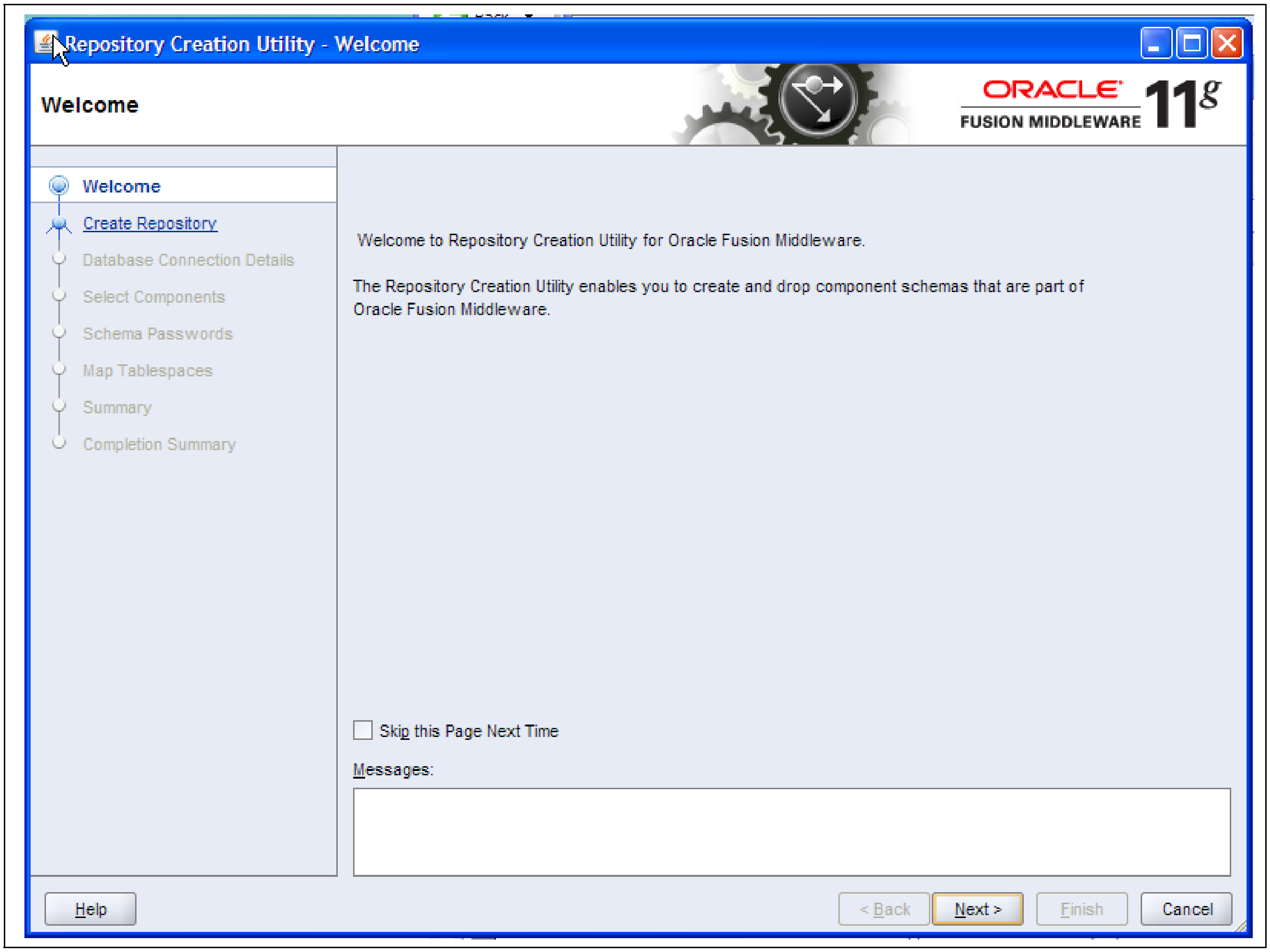
   Access the Oracle Technology Network at *http://www.oracle.com/technetwork/index.html*, select Downloads, SOA Suite, and then in the Oracle SOA Suite 11g Installations section (on that page) expand the Prerequisites & Recommended Install Process section and download the RCU.

   See the preceding “Prerequisites” section for this chapter.

2. Unzip the rcuHome.zip file into an accessible rcuHome drive.

3. Launch the rcu executable file /rcuHome/bin/rcu.exe.

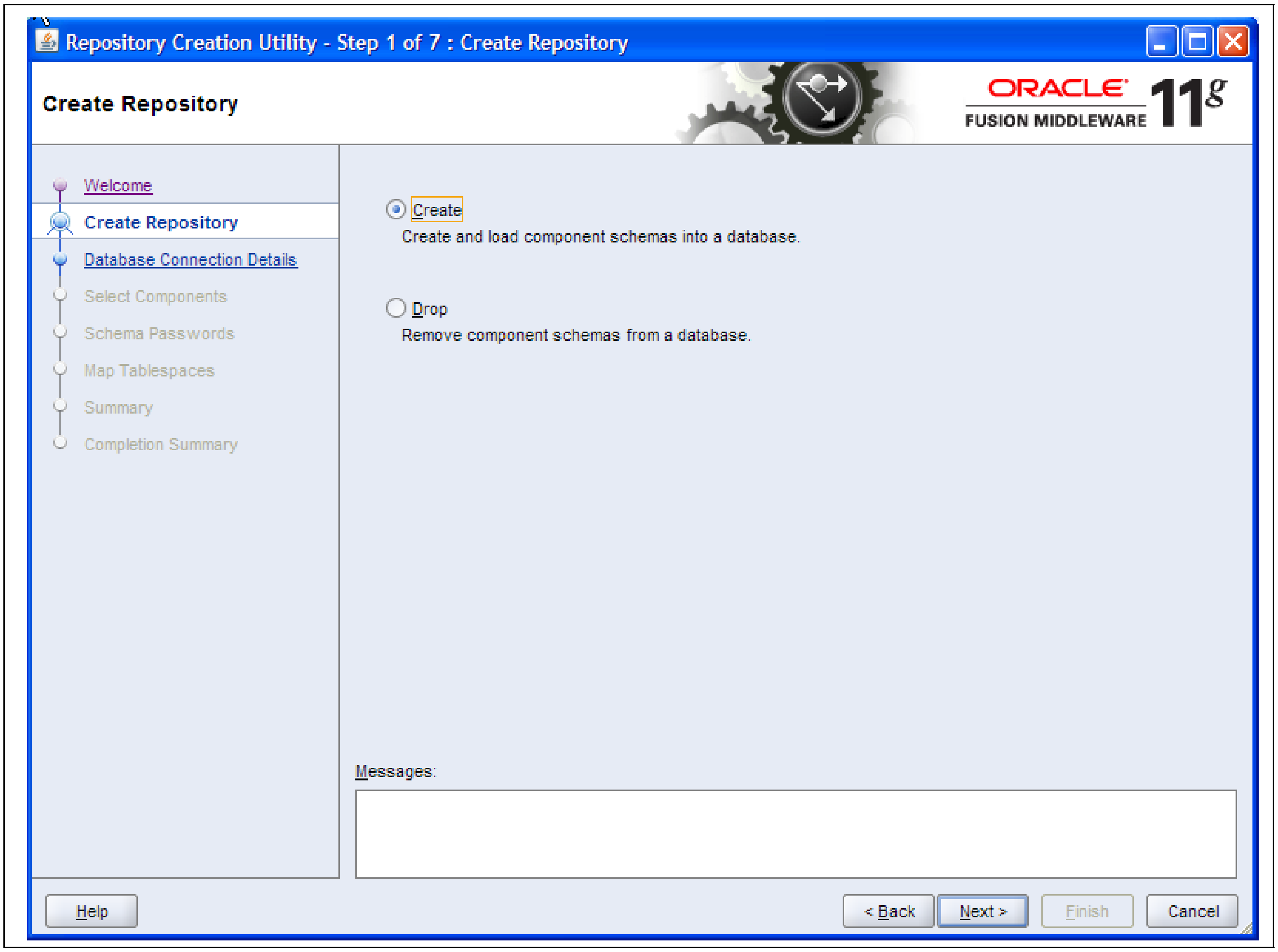
   The startup dialog box on the Welcome page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Welcome page

4. On the Repository Creation Utility Welcome page, click Next.

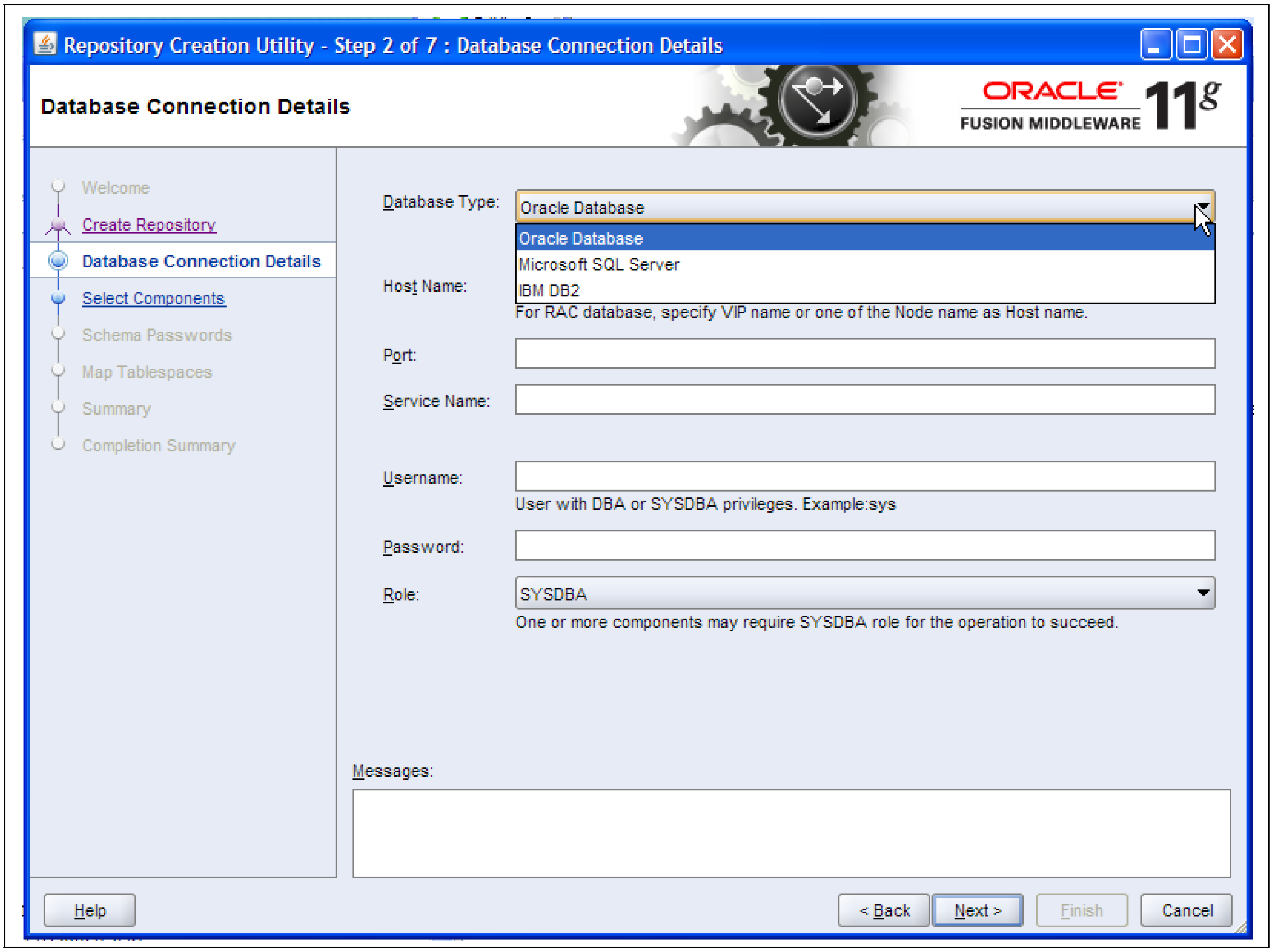
   The Repository Creation Utility - Create Repository page (Step 1 of 7) appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Create Repository page (Step 1 of 7)

5. On the Create Repository page (Step 1 of 7), select Create and then click Next.

   The Repository Creation Utility - Create Repository page (Step 2 of 7) appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Create Repository page (Step 2 of 7): Database Connection Details

6. On the Create Repository (Step 2 of 7) - Database Connection Details page, do the following:

   a. In the Database Type field, select the database type to store the metadata services repository from the drop-down list box.

      For example: *Oracle Database*

      This changes the database connection information that the utility requires (only Oracle connection information is shown).

      For most installations, you select the PeopleSoft database. However, you can choose a database other than the PeopleSoft database if you prefer. This database stores metadata for the OWSM system.

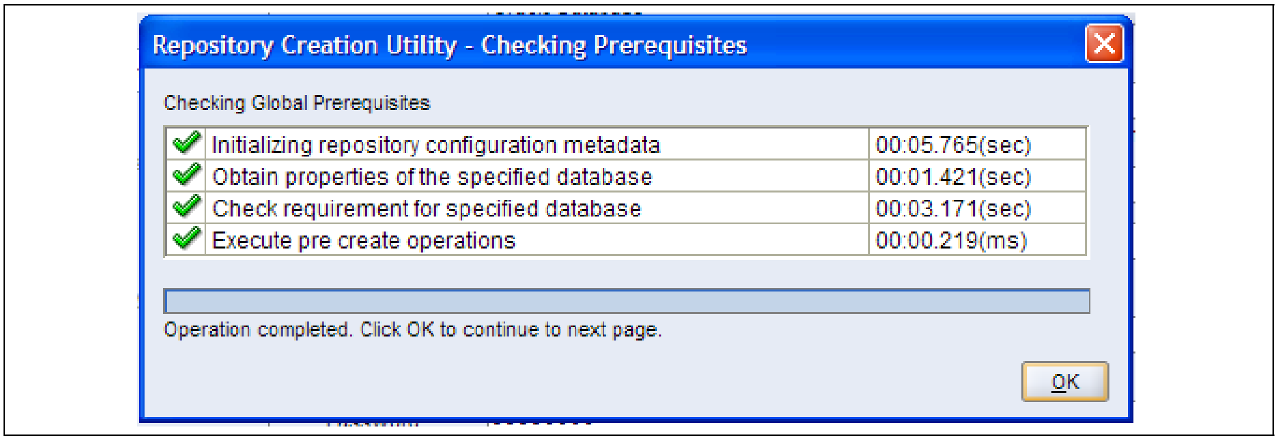
   b. Complete the database location and user information, based on the type of database that you select.

Note. The utility must create tables and table spaces. Therefore, the user ID and password that you enter must have DBA or SYSDBA privileges.

---

   c. Click Next.

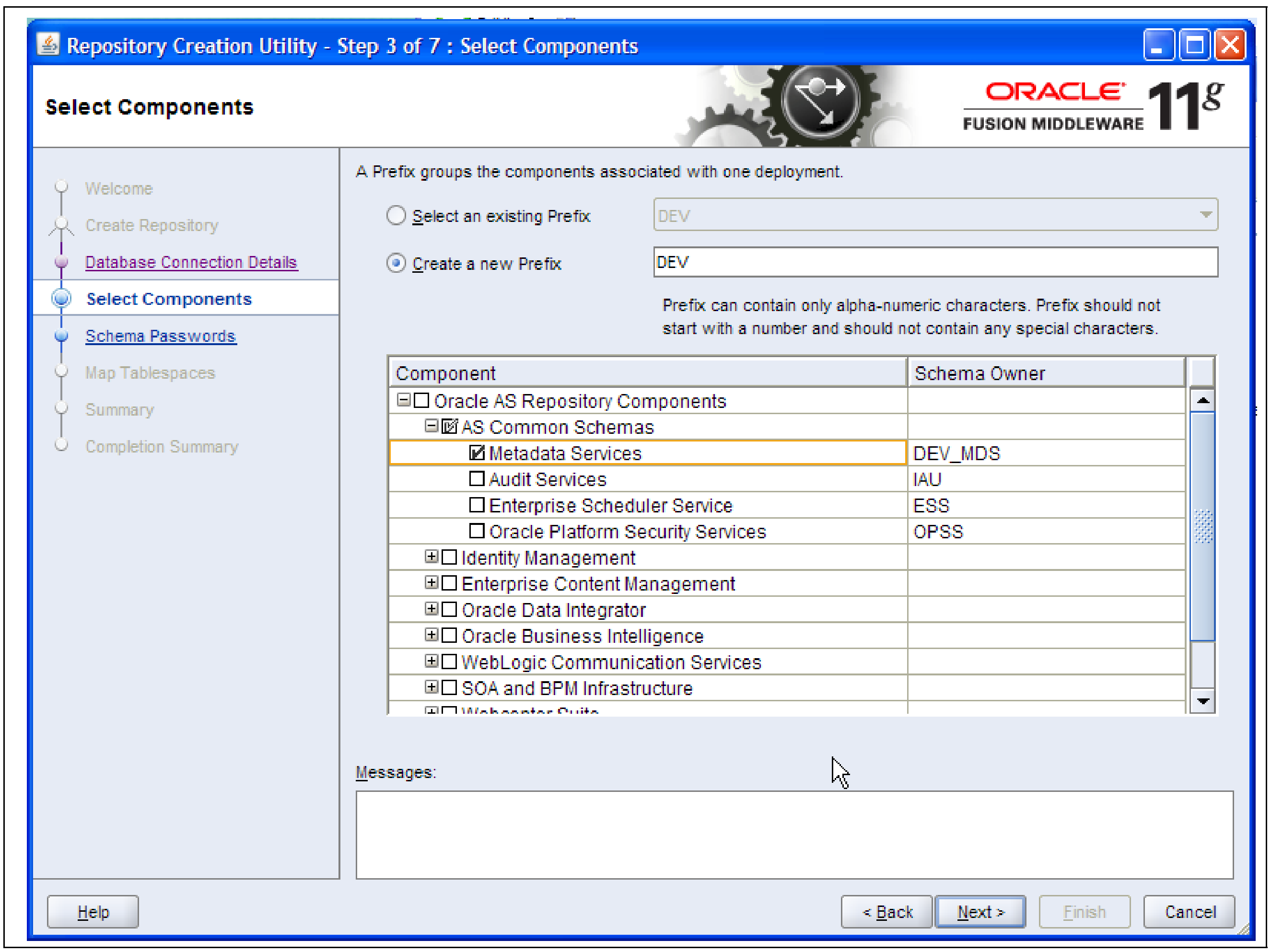
      The Repository Creation Utility - Checking Prerequisites page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Checking Prerequisites page

7. On the Repository Creation Utility - Checking Prerequisites page, the Oracle RCU determines if the database meets the minimum requirements to create the repository and connection. After this process completes, click OK.

   The Repository Creation Utility - Create Repository (Step 3 of 7) - Select Components page appears, as shown in the following example:

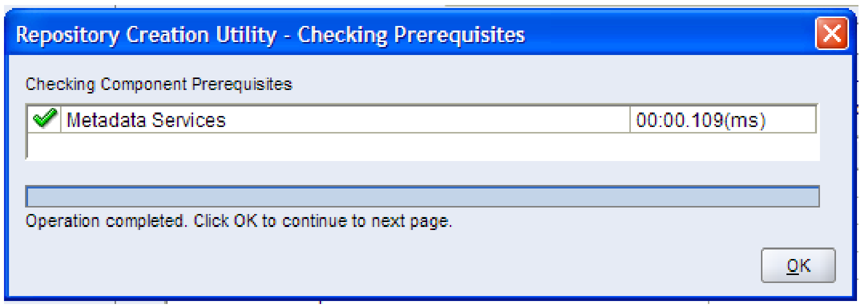


Oracle Fusion Middleware: Repository Creation Utility (Step 3 of 7) - Select Components page

8. On the Repository Creation Utility (Step 3 of 7) - Select Components page, select the option *Create a new Prefix,* and then enter *DEV* in the adjacent field.
9. In the Component section, expand the AS Common Schemas and select the Metadata Services check box.

   The Schema Owner column automatically populates. This is the only component that you need to create.
10. Click Next.

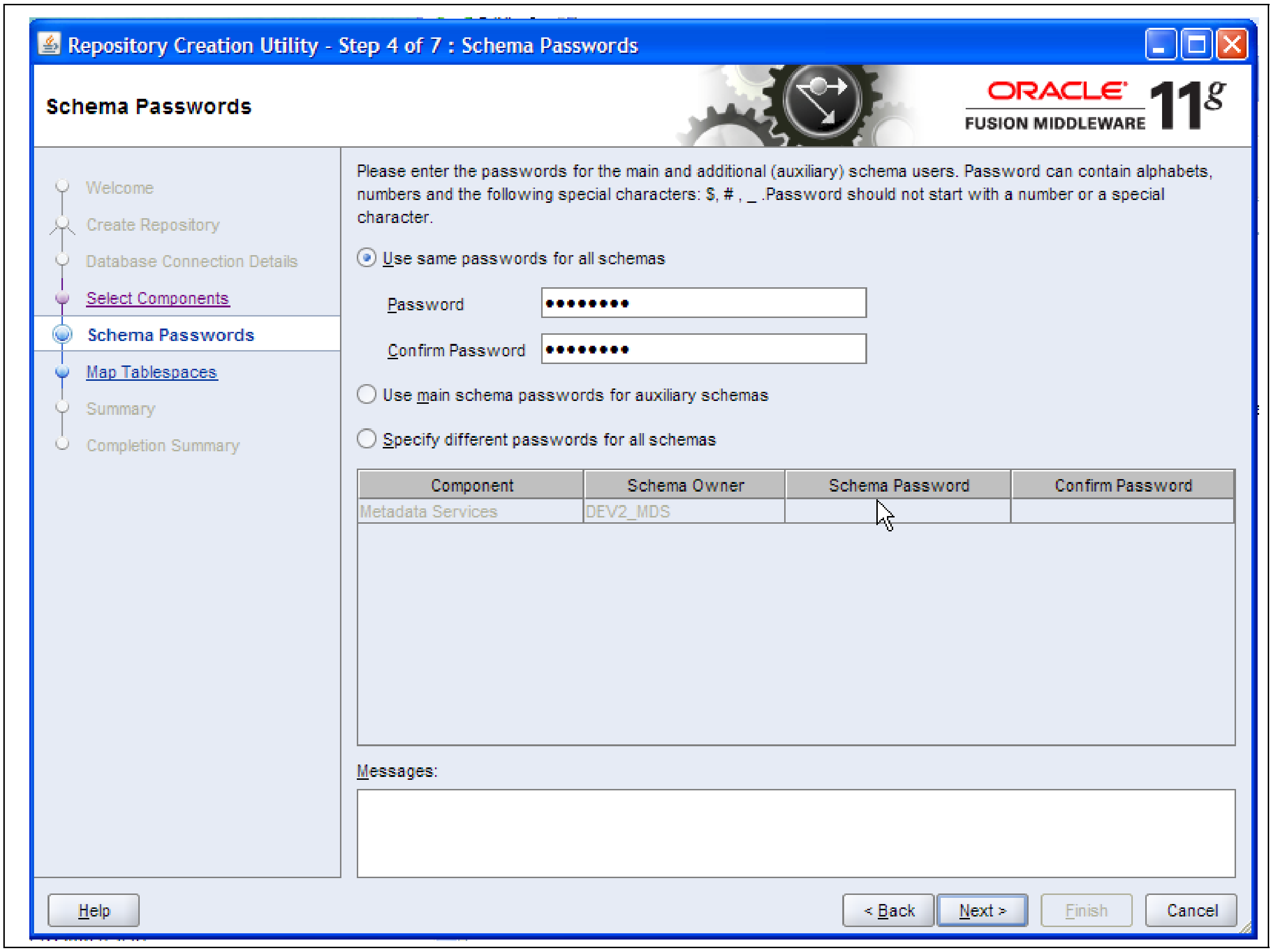
    The Repository Creation Utility - Checking Prerequisites page appears, as shown in the following example:



Repository Creation Utility - Checking Prerequisites page

11. On the Repository Creation Utility - Check Prerequisites page, the Oracle RCU validates that the database is capable of creating the components that you select. After this process completes, click OK.

    The Repository Creation Utility (Step 4 of 7) - Schema Passwords page appears, as shown in the following example:



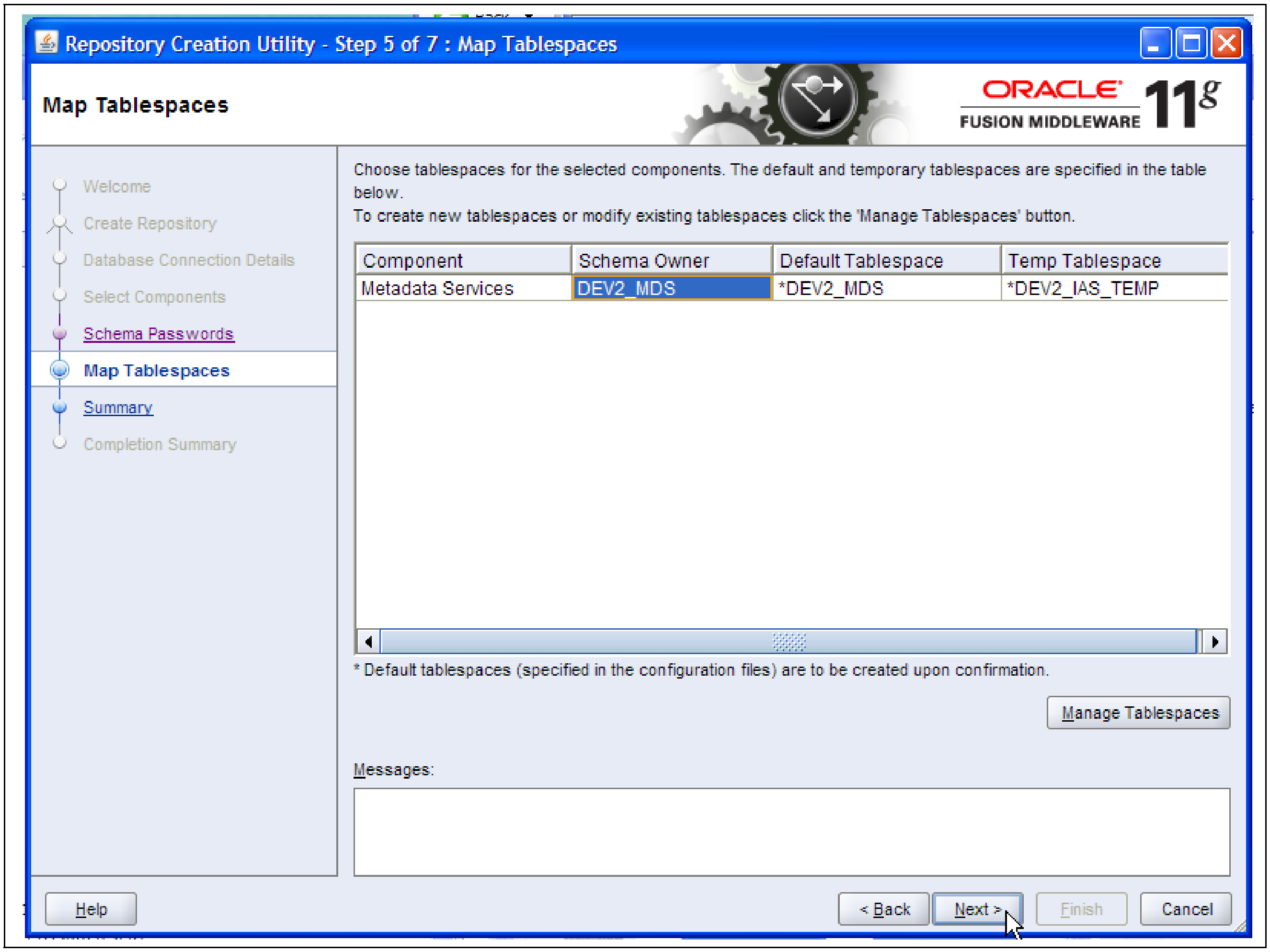
Oracle Fusion Middleware: Repository Creation Utility (Step 4 of 7) - Schema Passwords page

12. On the Repository Creation Utility (Step 4 of 7) - Schema Passwords page, accept the default option *Use same passwords for all schemas*, and then enter and confirm your password. The system uses this password in the next task when you install OWSM.

    Alternatively, you can select the options *Use main schema passwords for auxiliary schemas* or *Specify different passwords for all schemas*, and then enter and confirm your passwords accordingly.

13. Click Next.

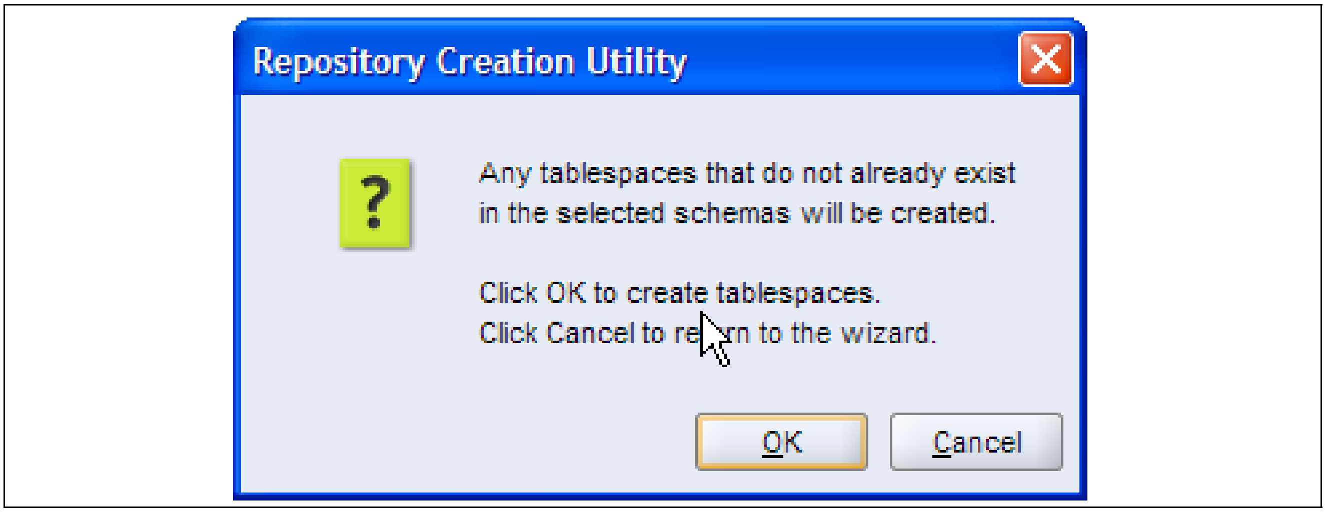
    The Repository Creation Utility (Step 5 of 7) - Map Tablespaces page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility (Step 5 of 7) - Map Tablespaces page

14. The Repository Creation Utility (Step 5 of 7) - Map Tablespaces page displays the default and temporary tablespaces that the system uses for the component that you are installing. Accept the defaults and click Next.

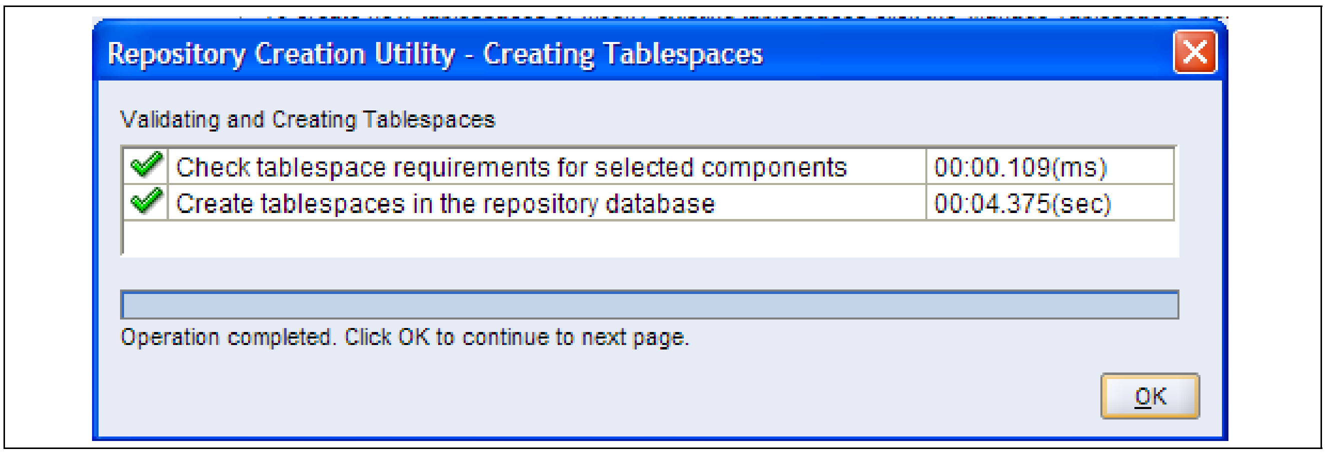
    A message box appears that states "Any tablespaces that do not already exist in the selected schemas will be created," as shown in the following example:



Repository Creation Utility - Message box

15. On the Repository Creation Utility message box, click OK to create the tablespaces.

    The Repository Creation Utility - Creating Tablespaces page appears, as shown in the following example:

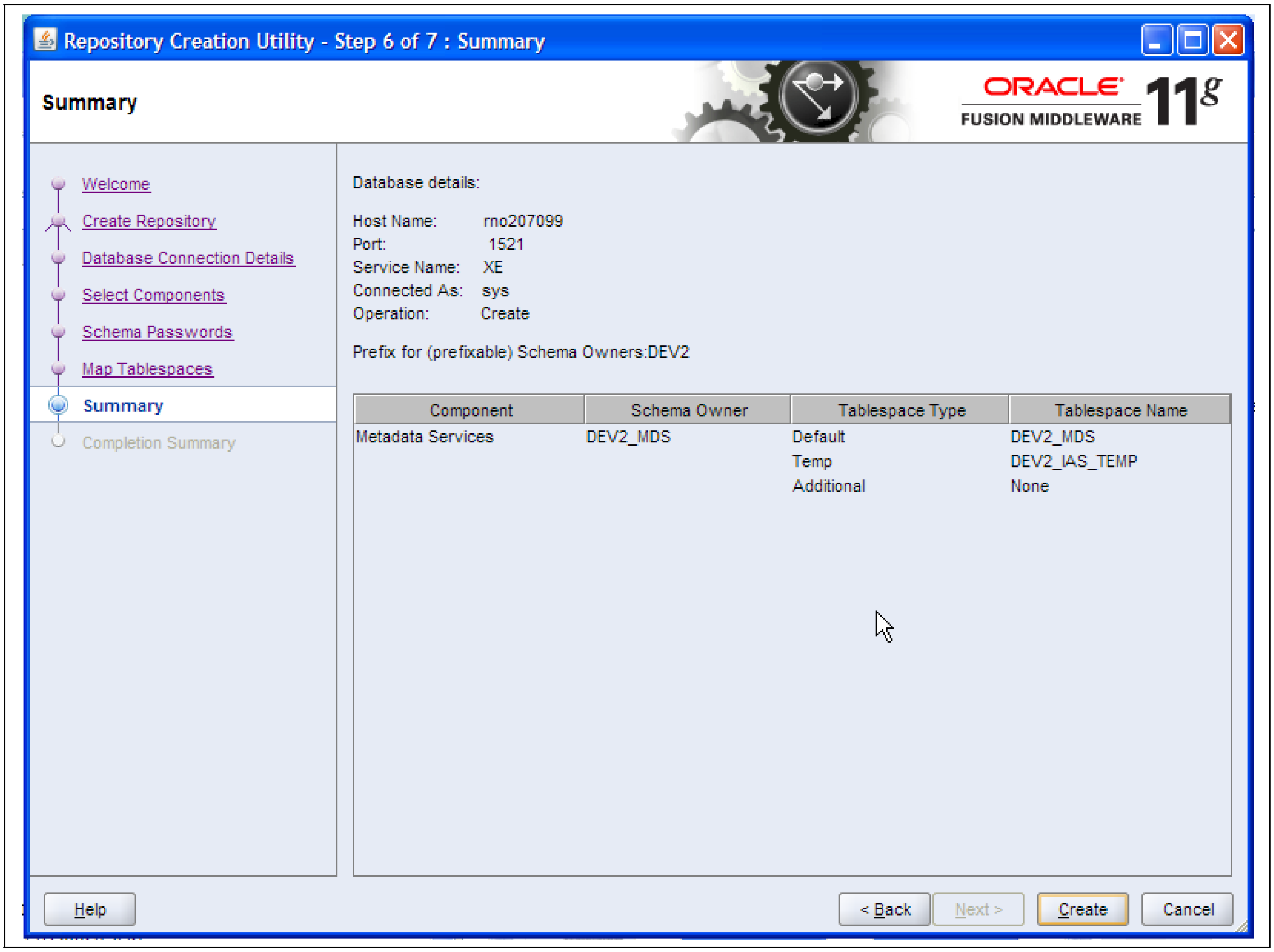


Repository Creation Utility - Creating Tablespaces page

16. On the Repository Creation Utility - Creating Tablespaces page, the Oracle RCU validates and executes the tablespace creation.

    After this process completes, click OK.

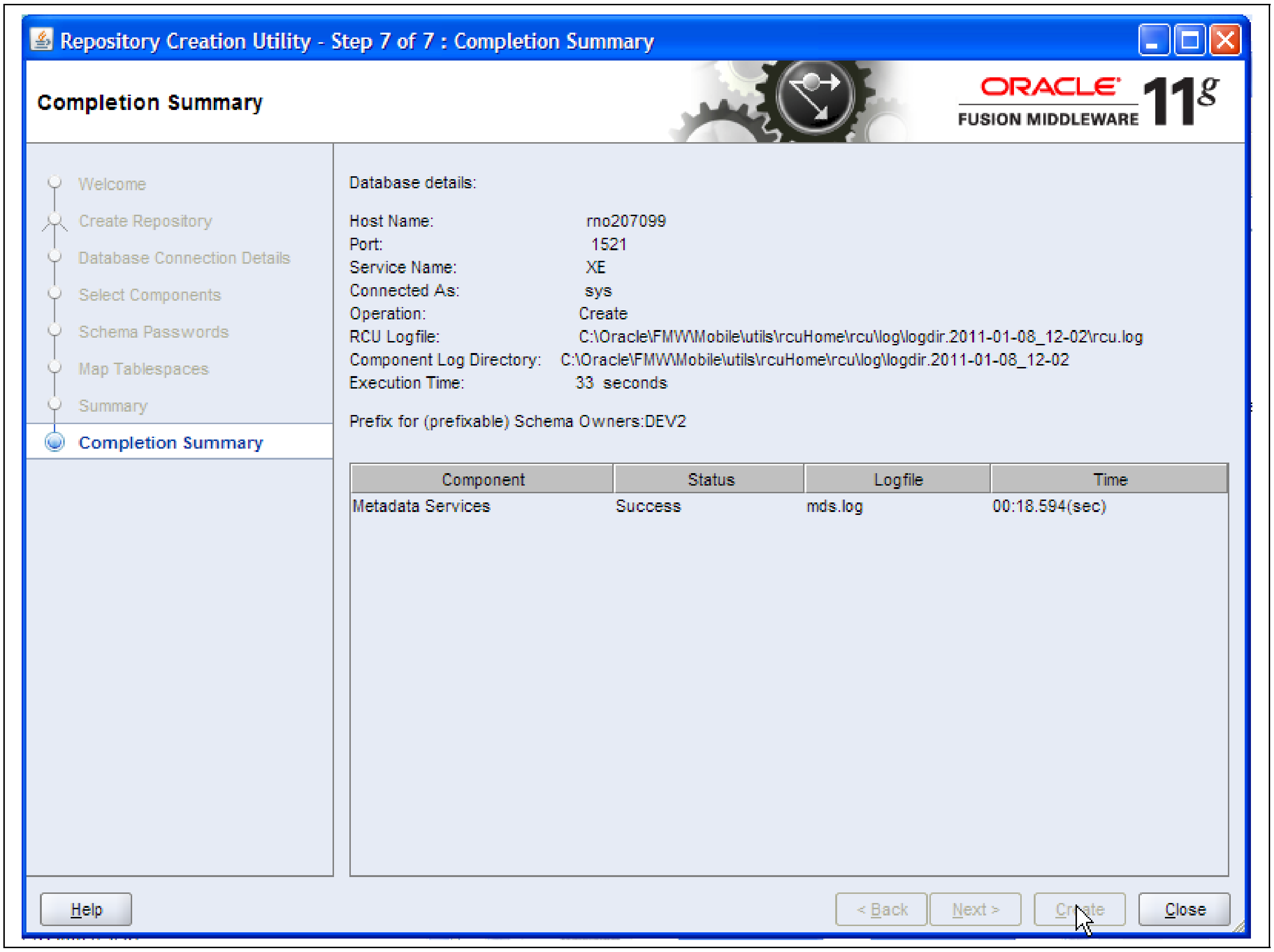
    The Repository Creation Utility (Step 6 of 7) - Summary page appears and displays the complete settings for the database and component that you are installing, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility (Step 6 of 7) - Summary page

17. On the Repository Creation Utility (Step 6 of 7) - Summary page, click Create to begin the repository creation process.

    The Repository Creation Utility (Step 7 of 7) - Completion Summary page appears and displays the metadata component’s successful installation, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility (Step 7 of 7) - Completion Summary page

18. On the Repository Creation Utility (Step 7 of 7) - Completion Summary page, click the Close button to complete and exit the installation.

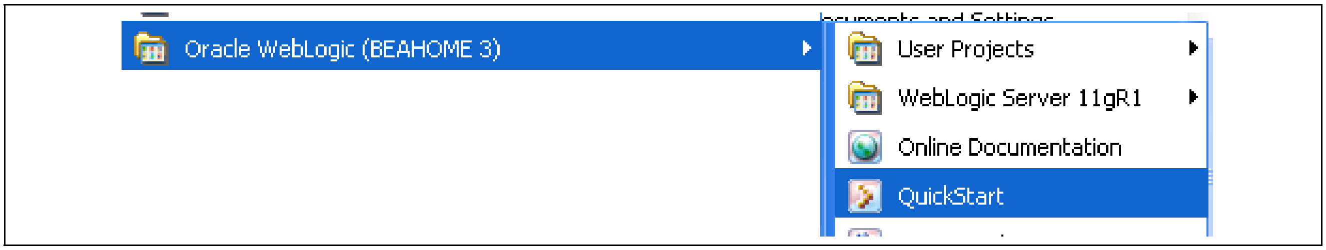
Task 23-1-2: Installing the Oracle Web Service Manager

The Oracle Web Service Manager (OWSM) applies client policies on the PeopleSoft Mobile Inventory Management application. OWSM requires access to a database and supports Oracle, SQL Server and DB/2. You can use any compatible database. Using the PeopleSoft database for OWSM is not a requirement, but is acceptable and does not impact the production system.

You can install OWSM from the Quick Start installation program that installs the Oracle Enterprise Manager.

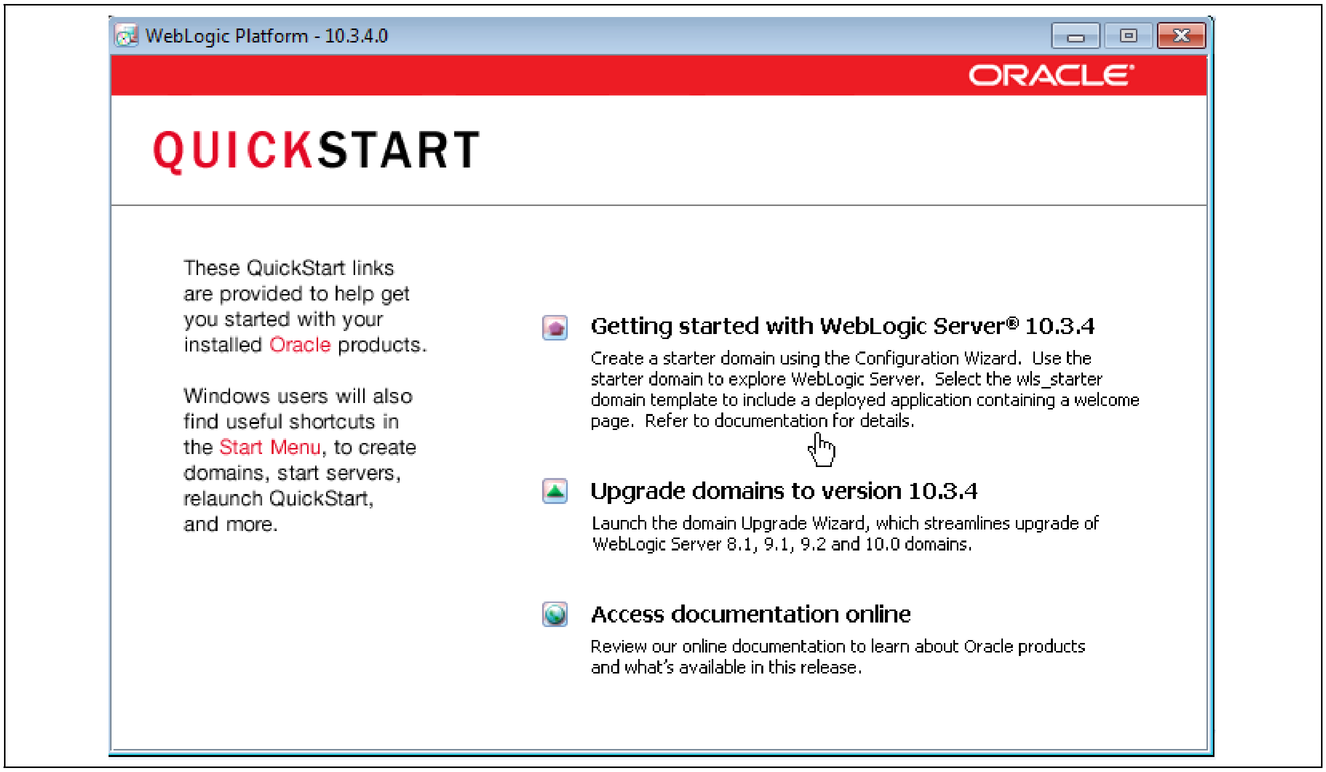
To install OWSM:

1. Use the menu options from the Program Group to select Oracle WebLogic, QuickStart, as shown in the following example:



Oracle WebLogic - Menu navigation from the Program Group to access QuickStart

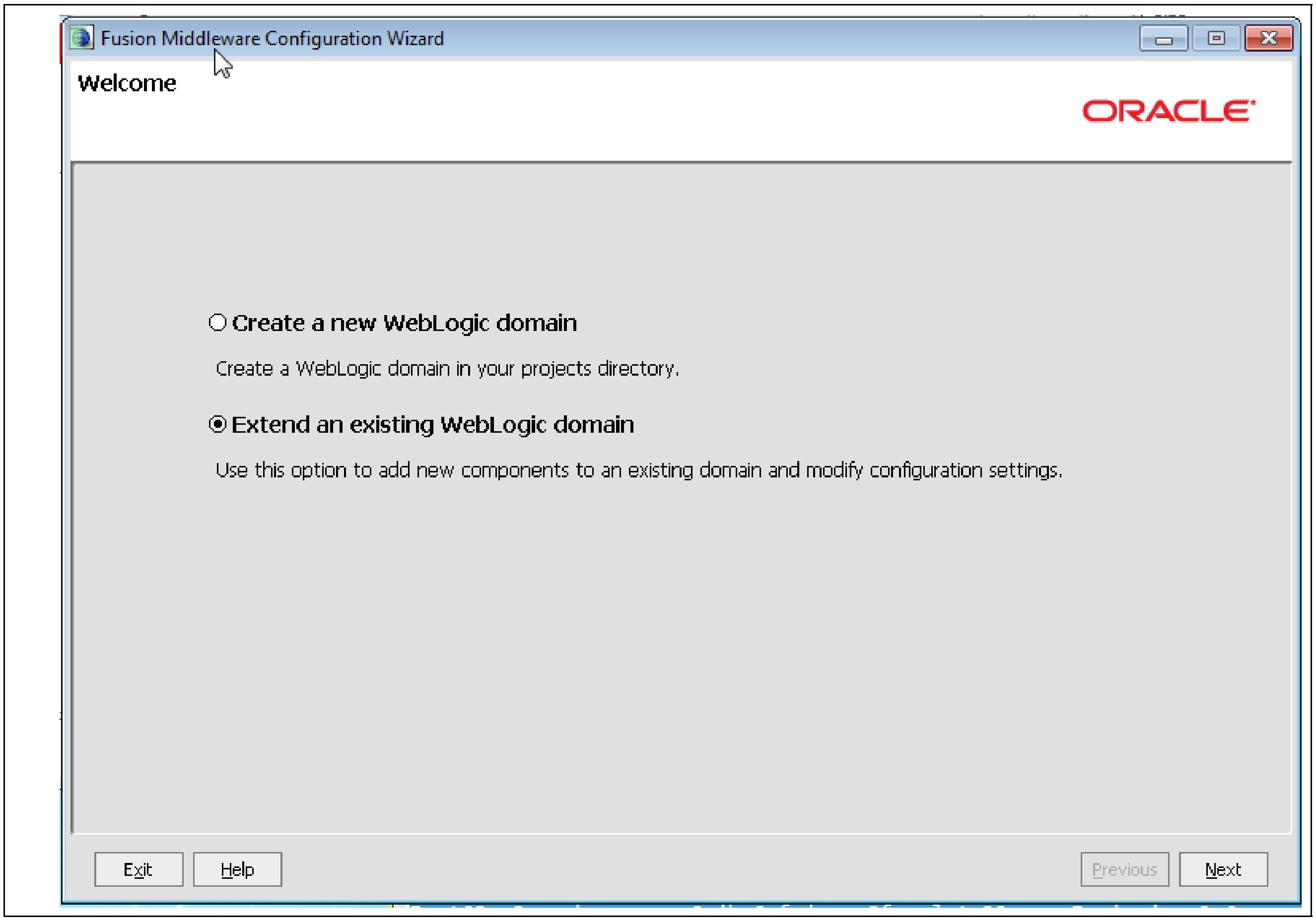
The WebLogic Platform - QuickStart page appears, as shown in the following example:



Oracle WebLogic Platform - QuickStart page

2. From the QuickStart Main Menu page, click the option *Getting started with WebLogic Server 10.3.4* (or higher).

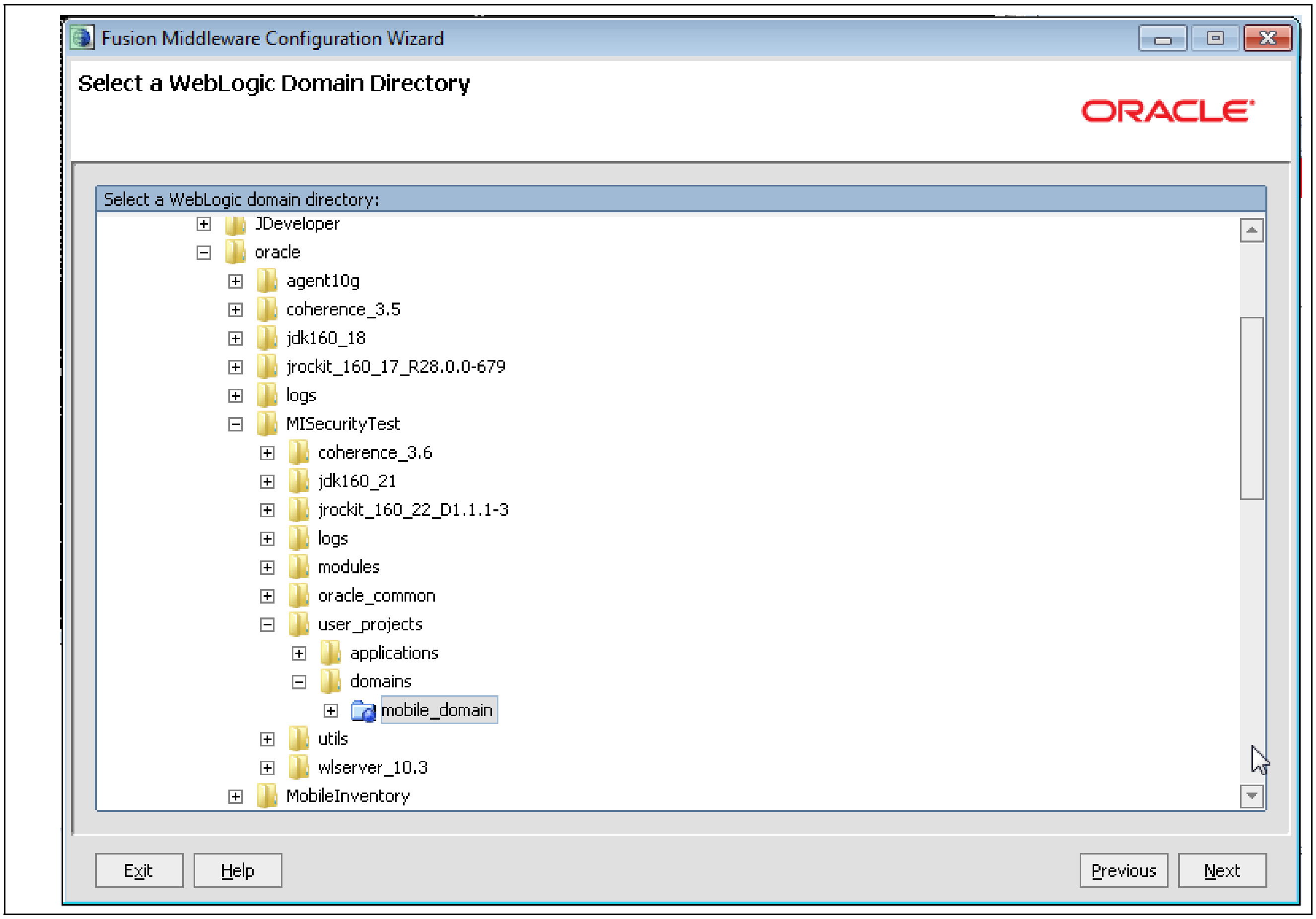
   The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Welcome page

3. On the Welcome page, select the option *Extend an existing WebLogic domain.*
4. Click Next.

   The Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page

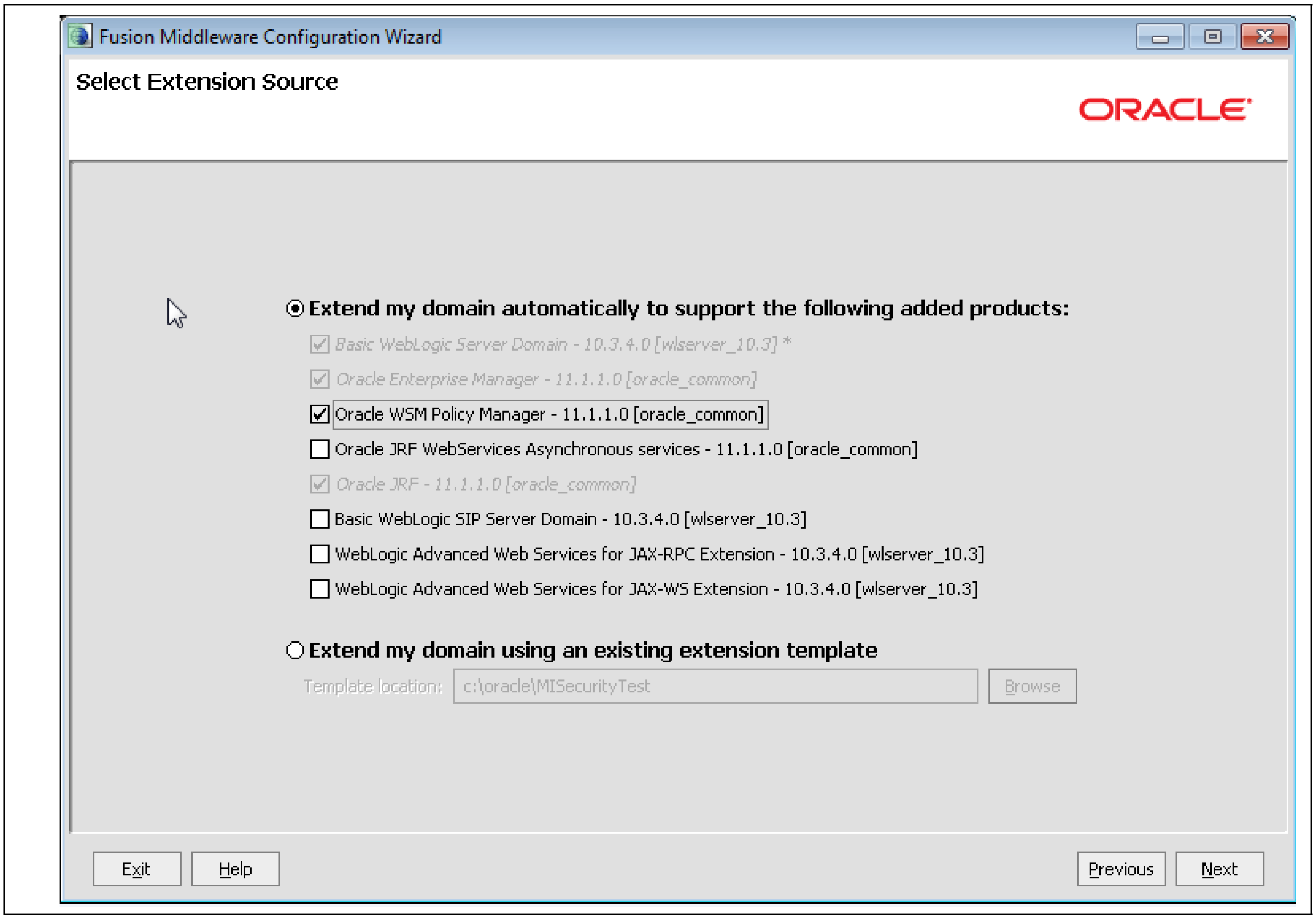
5. On the Select a WebLogic Domain Directory page, select the domain for your PeopleSoft Mobile Inventory Management application.

   The domain is under the directory that you created when performing step 4 of the task titled "Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management," discussed earlier in this installation guide (in the chapter titled "Installing PeopleSoft 9.1 Mobile Inventory Management").

   The domain name was entered in step 7 of the task titled "Starting the Configuration Wizard to Define a New Domain," discussed earlier in the chapter titled "Installing PeopleSoft 9.1 Mobile Inventory Management."

6. Click Next.

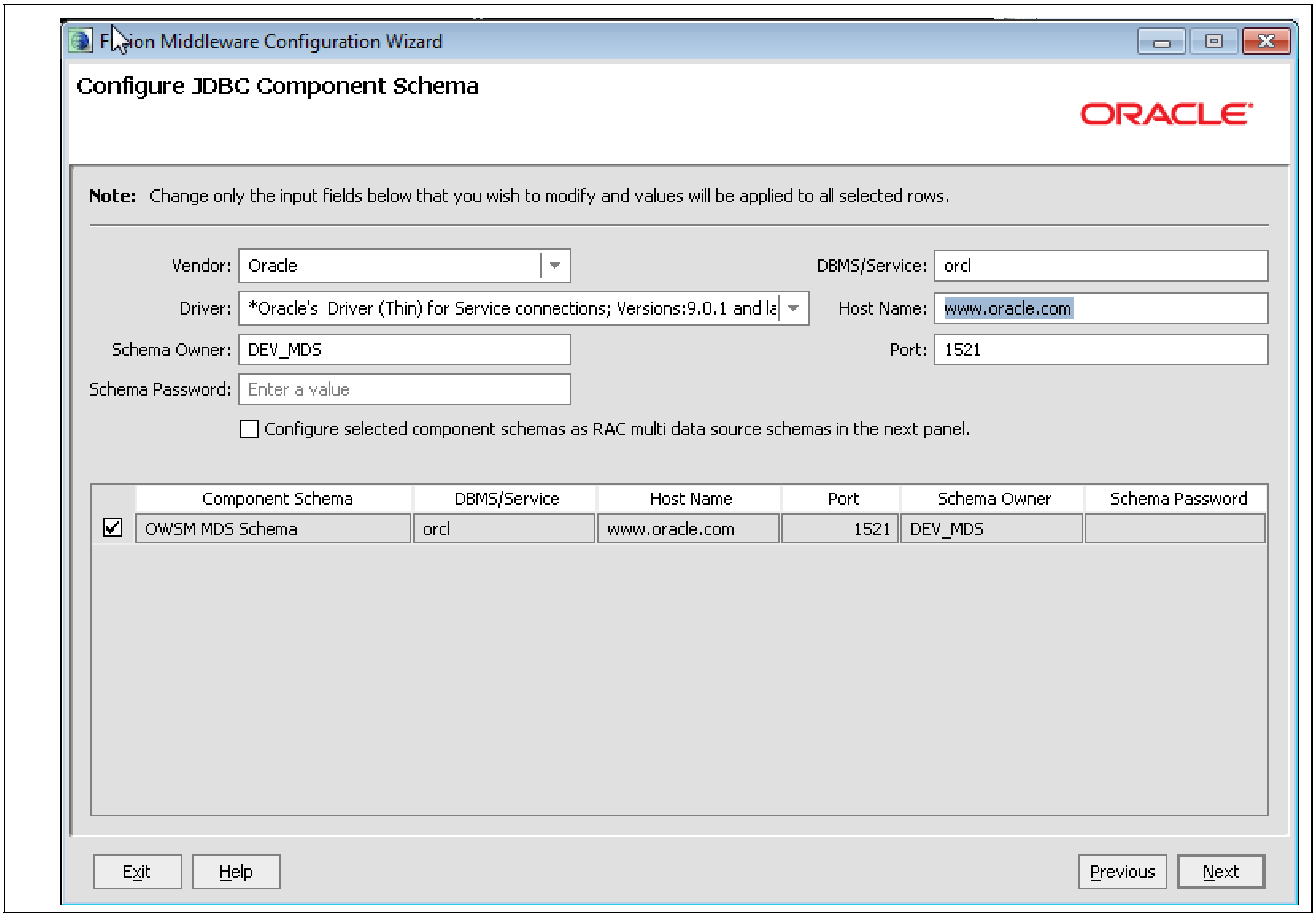
   The Fusion Middleware Configuration Wizard - Select Extension Source page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Extension Source page

7. On the Select Extension Source page, select the option *Extend my domain automatically to support the following added products*, and then select the check box for the *Oracle WSM Policy Manager – 121.1.1.0 (oracle_common)* product.
8. Click Next.

   The Fusion Middleware Configuration Wizard - Configure JDBC Component Schema page appears, as shown in the following example:

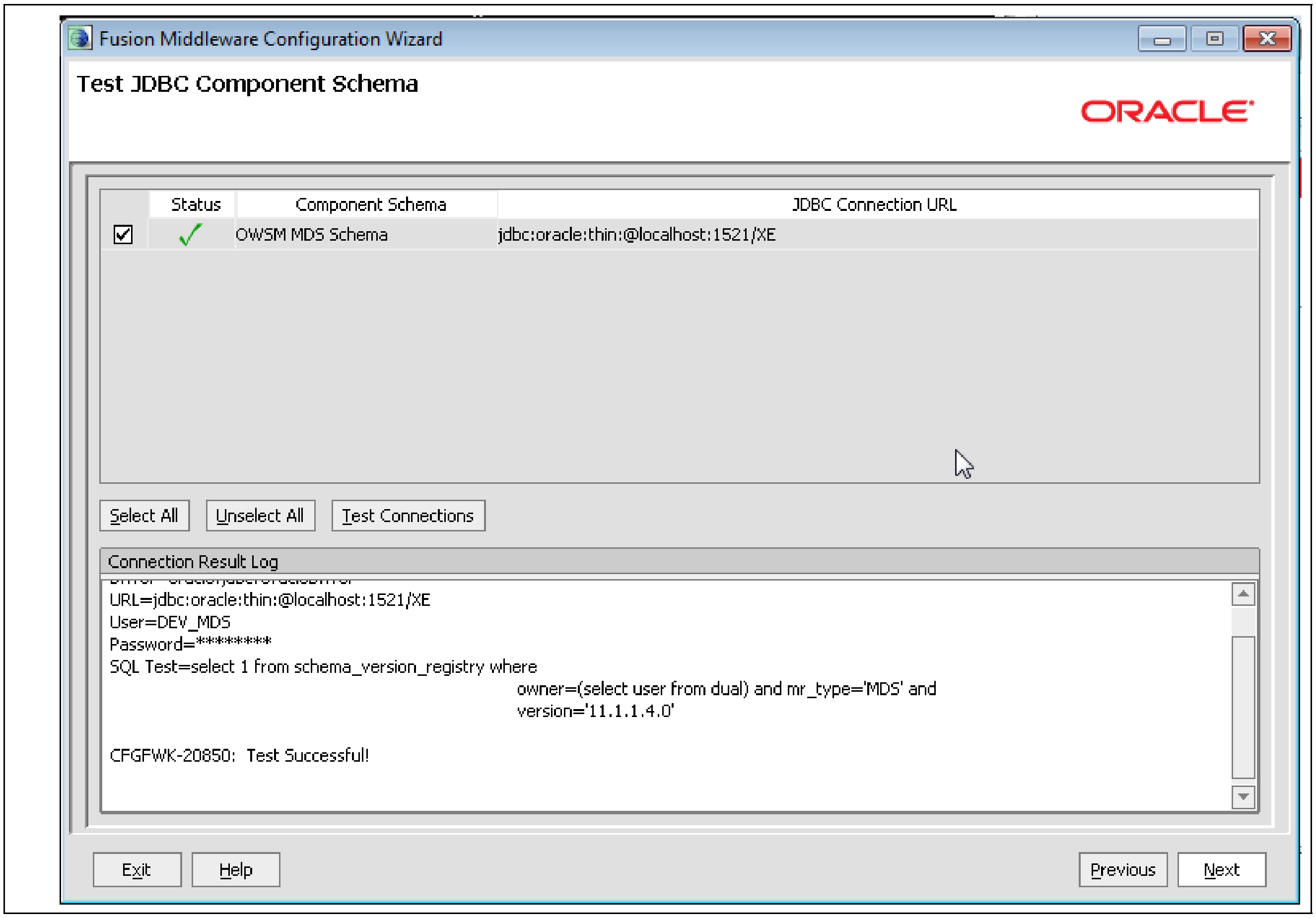


Fusion Middleware Configuration Wizard - Configure JDBC Component Schema page

9. On the Configure JDBC Component Schema page, the information that you enter must match the information in the preceding task titled “Running the Oracle Repository Creation Utility.”

10. Click Next.

    The Fusion Middleware Configuration Wizard - Test JDBC Component Schema page appears, as shown in the following example:

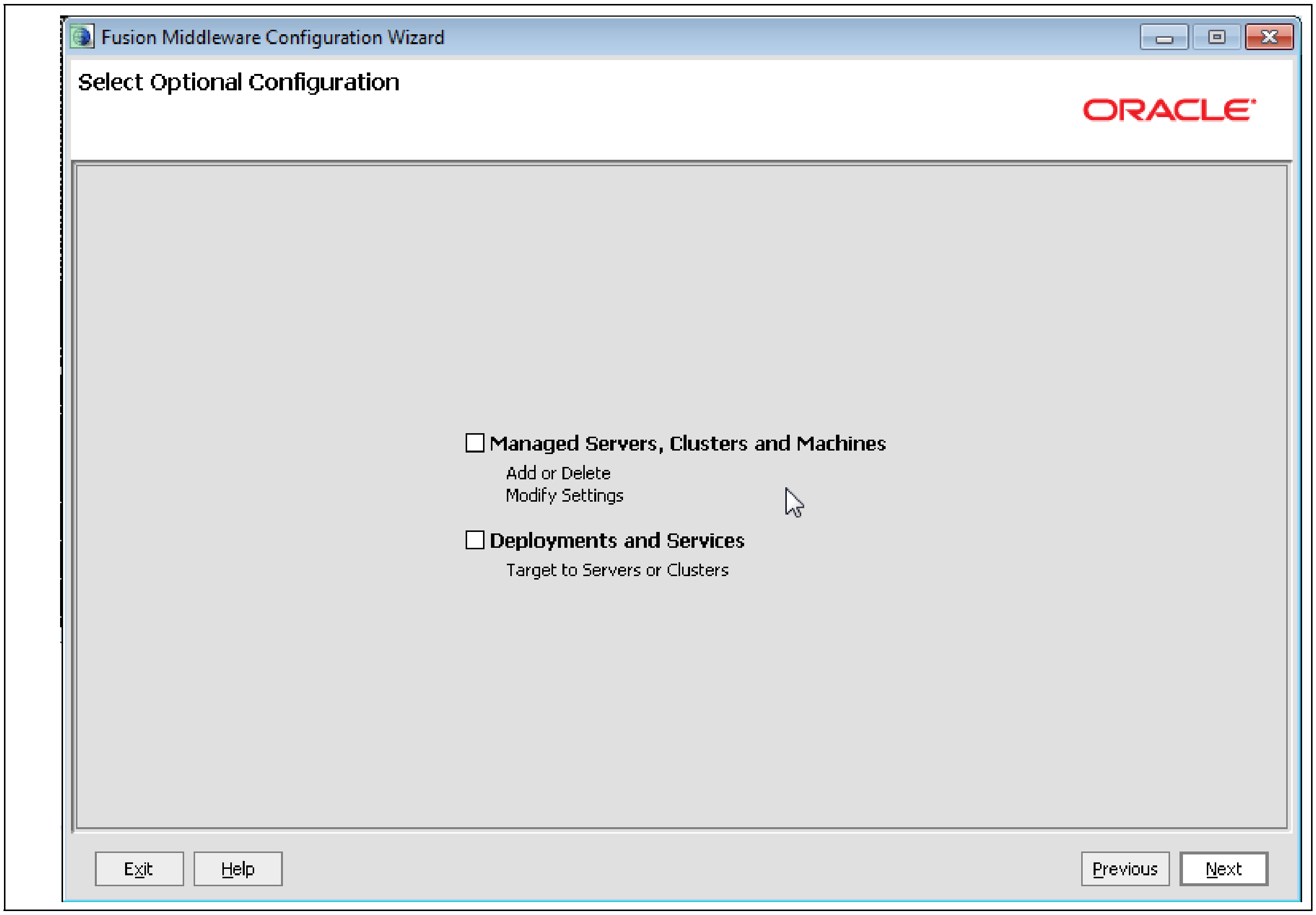


Fusion Middleware Configuration Wizard - Test JDBC Component Schema page

11. The Test JDBC Component Schema page requires no action. Click Next.

    The Test JCBC Component Schema page confirms that the information on the Configure JDBC Component Schema page is correct to use when installing the OWSM Policy Manager.

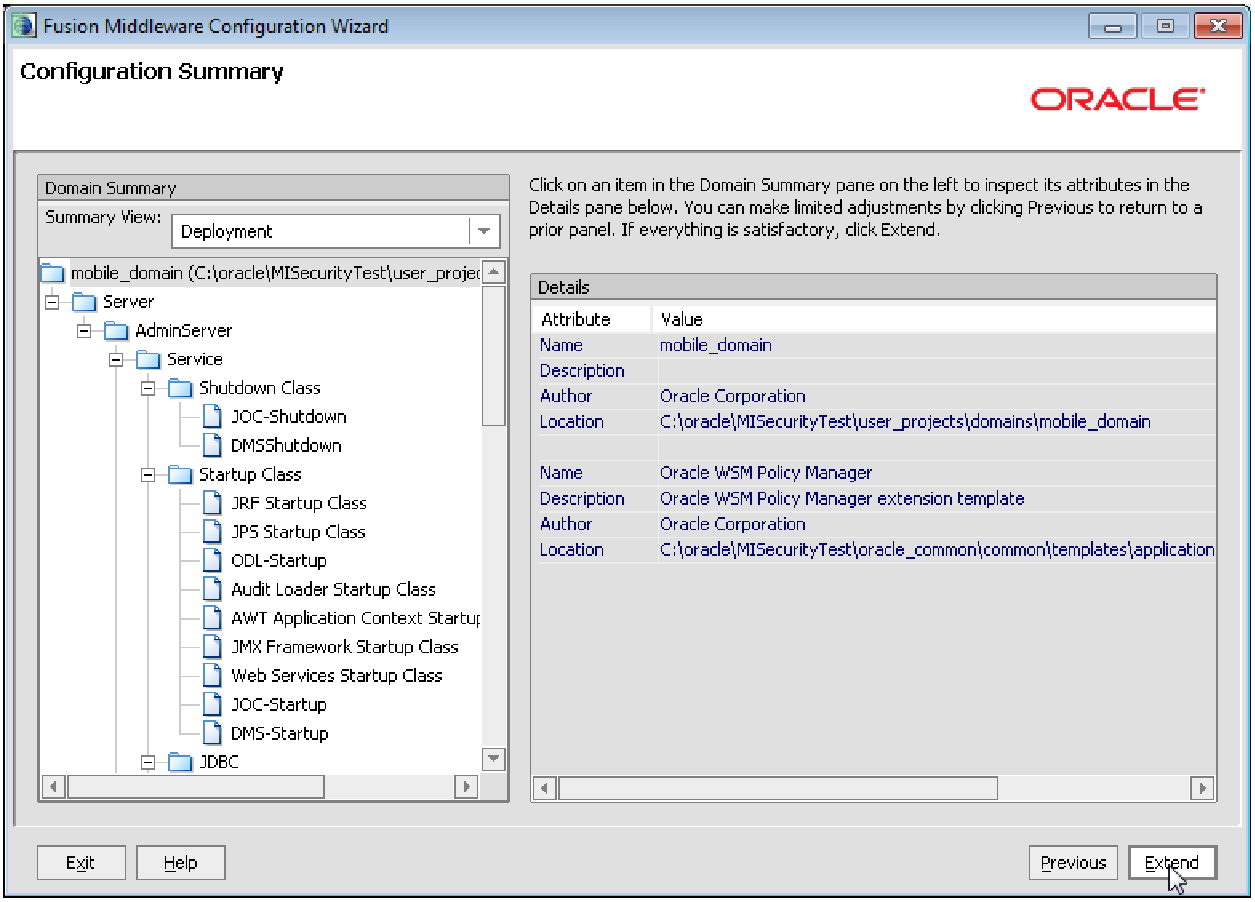
    The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

12. Leave the configuration check boxes clear (do not select) and click Next.

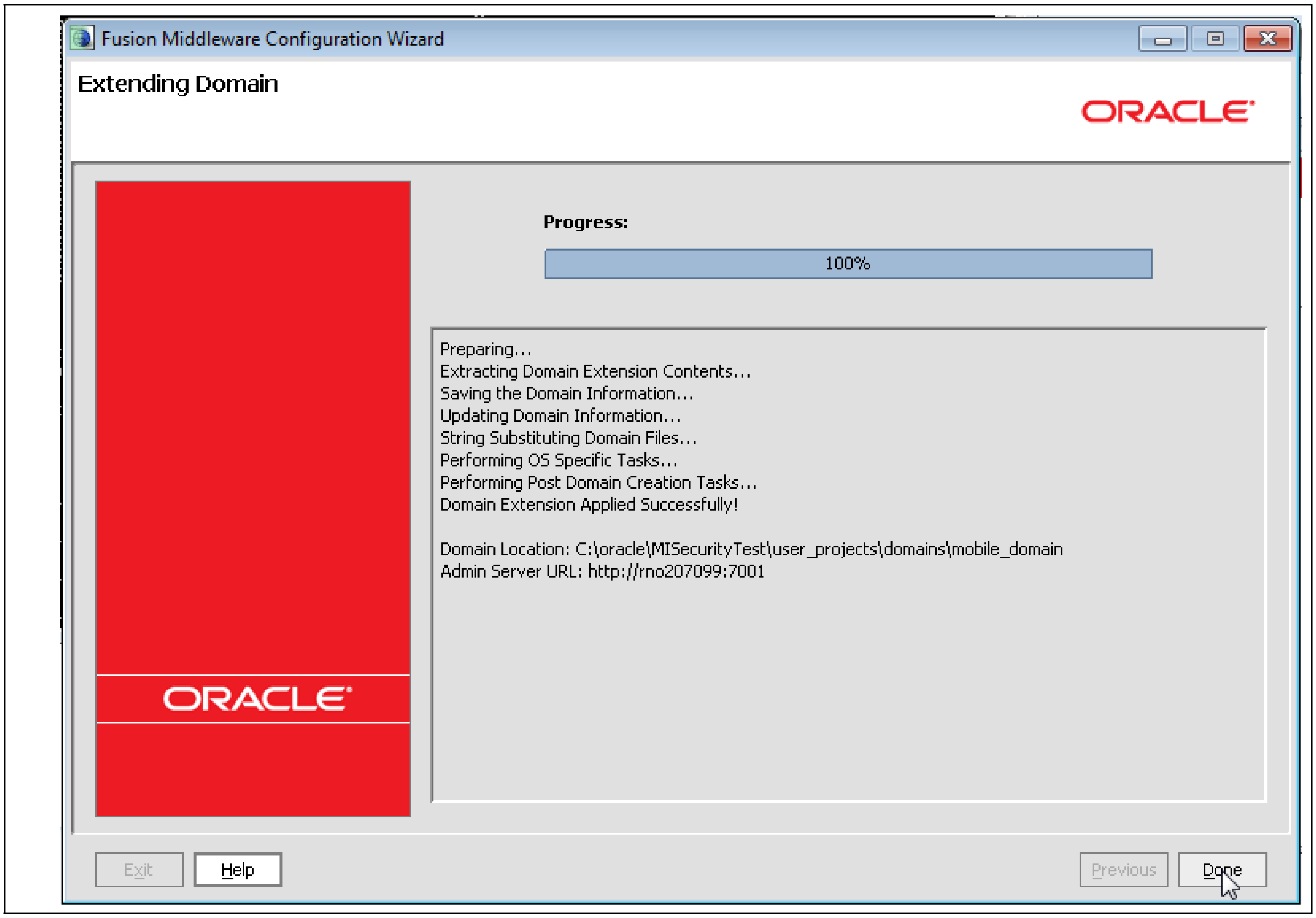
    The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configuration Summary page

13. On the Configuration Summary page, verify the details of the domain and components that you selected for installation, and then click the Extend button to continue the installation.

    The Fusion Middleware Configuration Wizard - Extending Domain Progress page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Extending Domain Progress page

The Extend Domain page shows the progress and details of the installation.

14. When the progress reaches 100%, click the Done button to complete the installation and exit the Configuration Wizard.

Task 23-1-3: Configuring the Certificates

Understanding Configuring the Certificates

Configuring the certificates between the PeopleSoft Mobile Inventory Management server and the PeopleSoft Integration Gateway involves populating keystores and generating public certificates that you copy between the servers.

Keytool is a utility that Oracle delivers with Java. The system uses this utility to manage the import and export of certificates from the keystores. You must have access to the Keytool utility from the Mobile Server Install and the PeopleSoft Install to continue with the installation.

Creating the default-keytsore.jks File on the Mobile Server

The mobile system looks for credentials in the default-keystore.jks file that is in the subdirectory mobile-domain\config\fmwconfig. The system creates this file when importing the keypair.

If you do not have an x.509 certificate, you can generate one using the Keytool utility.

Note. Oracle does not recommend that you secure your production system with generated self-signed certificates.

In the instructions that follow, Oracle provides an alias name of *mobileserv* to the certificate. The system uses this alias when importing the certificate to the keystore on the PeopleSoft Gateway and when configuring SAML in the PeopleSoft security system. You can change this alias, just be aware that these installation instructions refer to the alias as *mobileserv*.

Generating or Importing the Certificate to the Default-Keystore

To generate or import the certificate into the default-keystore:

1. Run this step on the PeopleSoft Mobile Inventory Management server on the command line in the subdirectory:

   mobile_domain\config\fmwcong

2. Do one of the following:

   - If you have a keypair certificate from a certificate authority, you do not need to create a certificate in this step. Simply import your keypair certificate into the default-keystore.jks file.
   - If you want to generate a self-signing certificate, run the following from the command line:

     Keytool –genkey –alias mobileserv –keyalg RSA –dname “CN=[machine name], OU=[Org Unit], O=[Org], L=[Location], ST=[2 letter abbreviation for state], C=[2 letter abbrevication for country]” –keypass [password] –keystore default-keystore.jks –storepass [password]

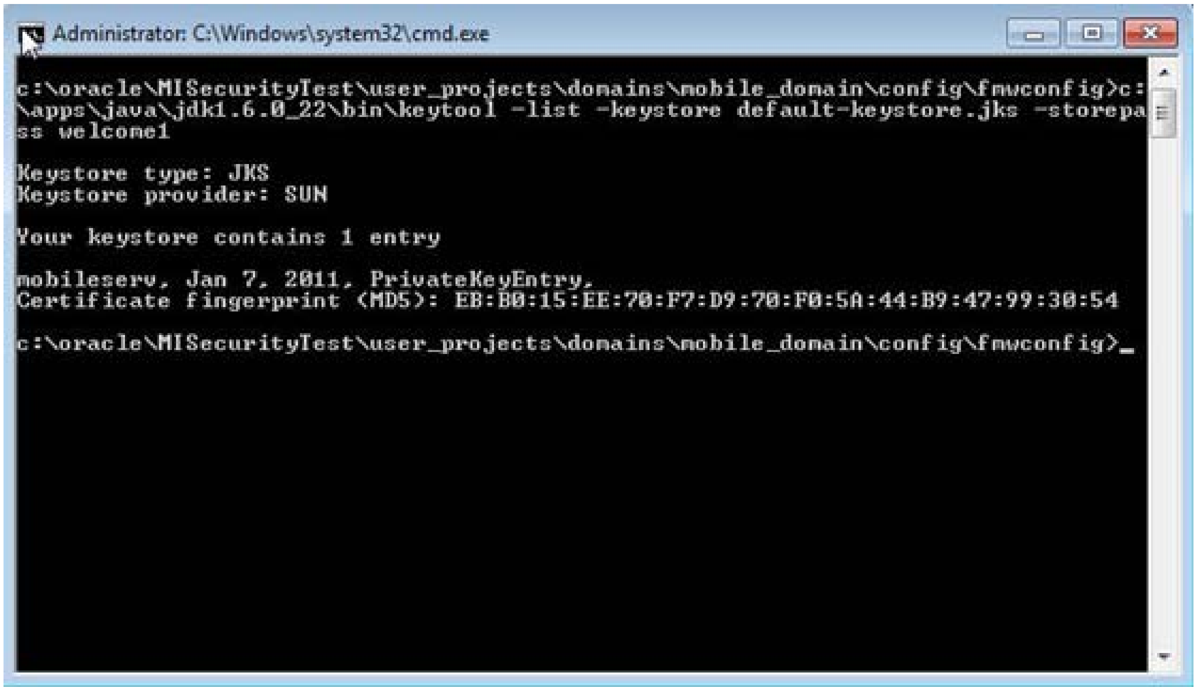
3. If you have a certificate, import your certificate into the default keystore using the *–import* option:

   Keytool –imoprtcert –alias mobileserv –file [certificate file] –keypass [password] default-keystore.jks –storepass [password]

   At this point in the installation, the system creates the default-keystore.jks file that contains the keypair certificate for the PeopleSoft Mobile Inventory Management server.

4. Verify that the keystore is set up correctly by running the list command to see the contents of the keystore.

   The following example shows the list command and the output identifying 1 entry, *mobileserv*:



Command Window - Default-keystore.jks list

Exporting the mobileserv Public Key Certificate

To export the *mobileserv* public key certificate:

1. Run this step on the PeopleSoft Mobile Inventory Management server on the command line in the following subdirectory:

   mobile_domain\config\fmwcong

2. To create the mobileserv.cer file, enter the following command:

   Keytool –exportcert –v –alias mobileserv –keystore default-keystore.jks –storepass [password] –rfc –file mobileserv.cer

3. Copy the mobileserv.cer file to the following subdirectory:

   PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

   This is the directory that contains the PeopleSoft keystore file *interop.jks* that Oracle delivers.

Importing the mobileserv Certificate to the Interop Keystore

To import the *mobileserv* certificate into the interop keystore:

1. Run this step from the command line in the following subdirectory:

   PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

2. Run the command to import the mobileserv certificate into the PeopleSoft keystore, interop.jks. The certificate should be in the file *mobileserv.cer* that you copied in step 3 of the preceding subtask (“Exporting the mobileserv Public Key Certificate”).

   Keytool –importcert –alias mobileserv –file mobileserv.cer –keypass [password] –keystore interop.jks –storepass interop Trust this certificate: yes

Generating the Encryption Keypair in the Interop Keystore

The encryption node keypair encrypts the public key information in the soap header. The alias name for the encryption key should be the same as the default local node for the PeopleSoft system.

To generate the encryption keypair in the interop keystore:

1. Run this step from the command line in the following subdirectory:

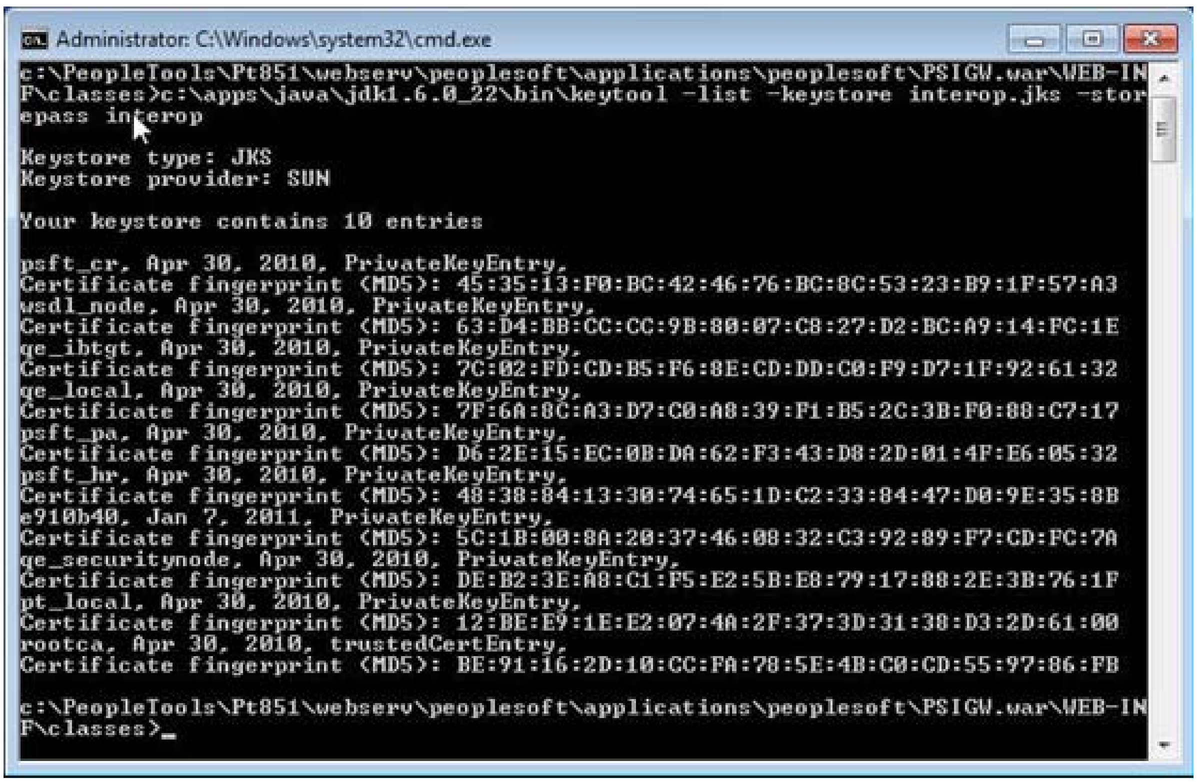
   PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

2. Run the following command:

   keytool -genkeypair -alias [default local node name] -keyalg RSA -dname “CN=[machine name], OU=[Org Unit], O=[Org], L=[Location], ST=[2 letter abbreviation for state], C=[2 letter abbrevication for country]” -keystore interop.jks -storepass interop

   At this point, the mobileserv and default local encryption certificates are in the interop.jks keystore.

3. Verify that the import was successful by running the keystore *–list* command, as shown in the following example:



Command Window - Keystore list command displaying the contentsof interop.jks

Exporting the Encryption and Root Node Certificates

To export the encryption and root node certificates:

1. Run this step from the command line in the following subdirectory:

   PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

2. Export the public key and root certificate for encryption from the interop.jks keystore using the keytool *–exportcert* command, as follows:

keytool -exportcert -v -alias rootca -keystore interop.jks -storepass interop -rfc -file rootca.cer

keytool -exportcert -v -alias [default local node name] -keystore interop.jks -storepass interop -rfc -file [default local node name].cer

Copying the Encryption and Root Certificate Files to the Mobile Server

To copy the encryption and root certificate files to the PeopleSoft Mobile Inventory Management server:

1. Run this step from the command line in the following subdirectory:

   PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

2. Copy the two certificate files to the following subdirectory:

   mobile-domain\config\fmwconfig

3. Run the steps that follow on the PeopleSoft Mobile Inventory Management server on the command line in the following subdirectory:

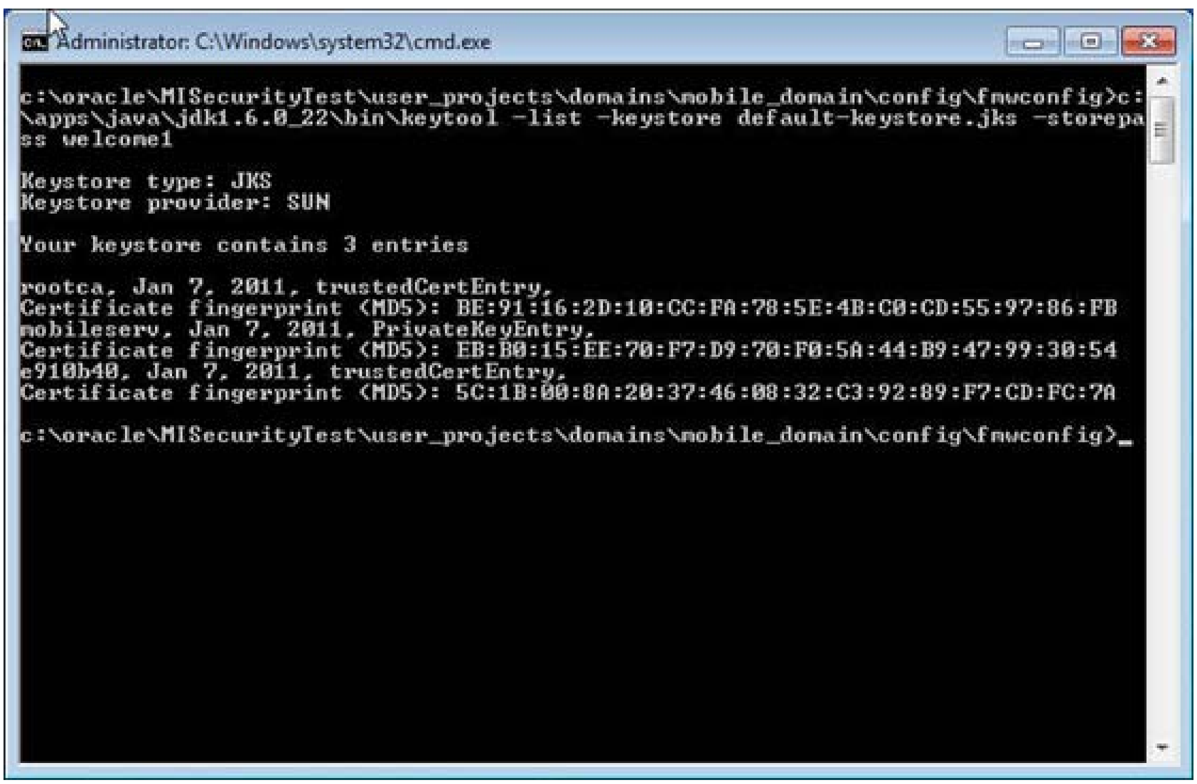
   mobile_domain\config\fmwcong

4. Run the following commands:

   keytool -importcert -alias rootca -file rootca.cer -keystore default-keystore.jks -storepass [password] Trust this certificate: yes

   keytool -importcert -alias [default local node name] -file [default local node name].cer -keystore default-keystore.jks -storepass [password] Trust this certificate: yes

5. Verify that the import was successful by running the keytool *–list* command, as shown in the following example:



Command Window - List view of the default-keystore.jks

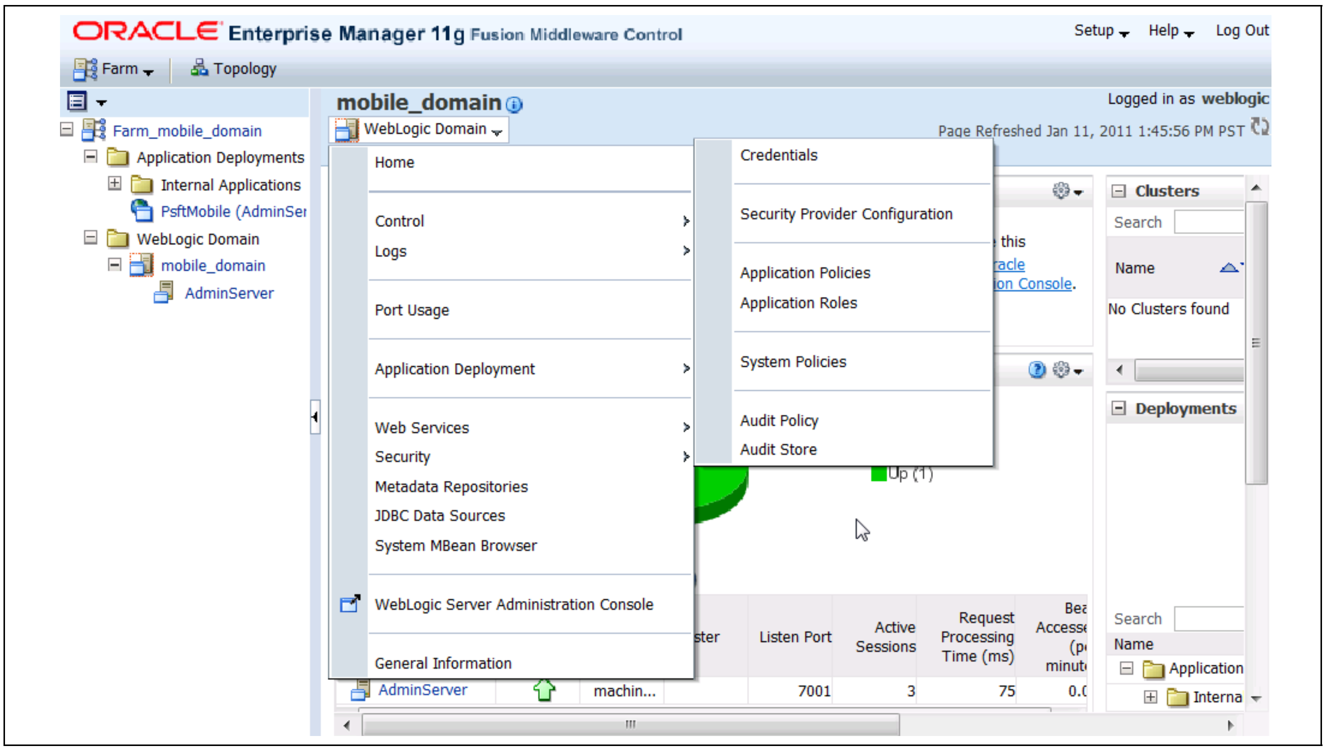
At this point, both keystores, the default-keystore.jks and interop.jks should contain the following three certificates:

- rootca
- mobileserv
- [default local node name]

Task 23-1-4: Creating and Configuring the Keystore and Credential Store

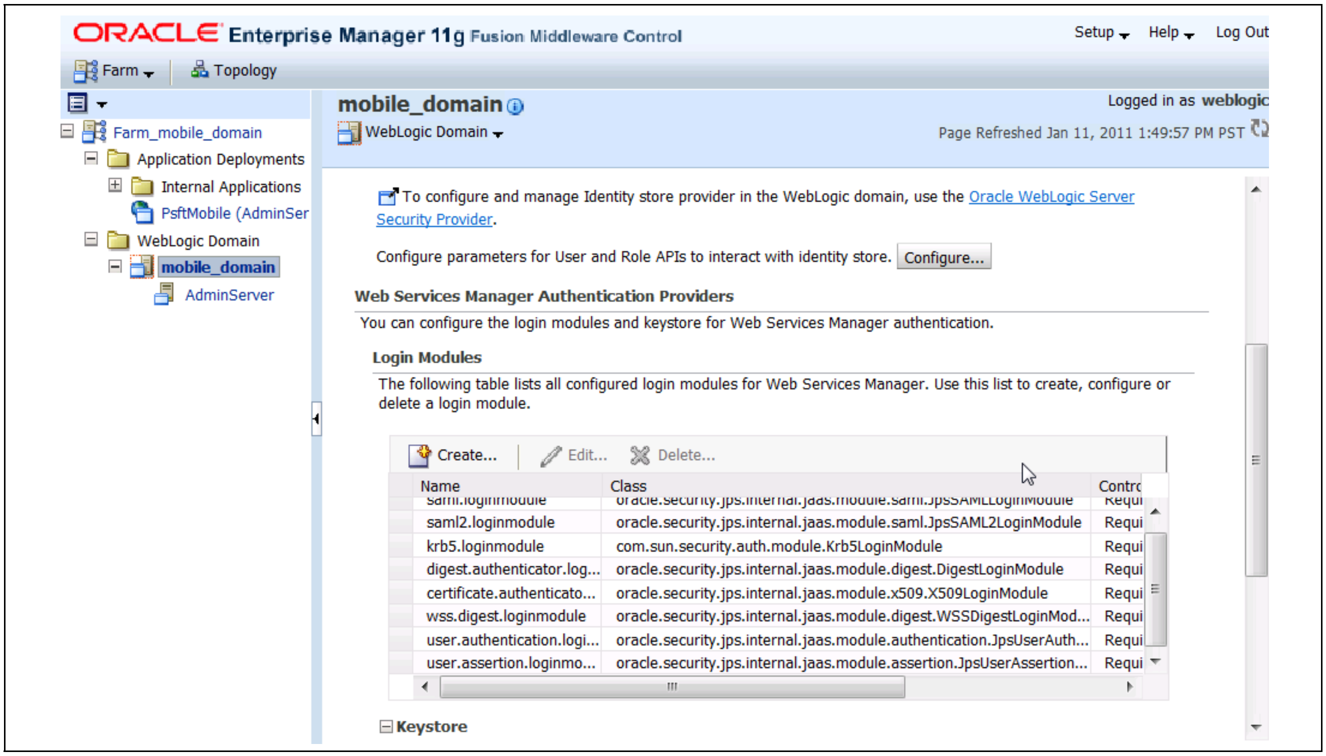
To create and configure the credential store on the PeopleSoft Mobile Inventory Management server:

1. Start the Oracle Enterprise Manager for the PeopleSoft Mobile Inventory Management server domain.
2. From the Oracle Enterprise Manager menu, select WebLogic Domain, Security, Security Provider to access the Security Provider Configuration page, as the navigation shows in the following example:



Oracle Enterprise Manager - Farm Tree menu navigation to access the Security Provider Configuration page

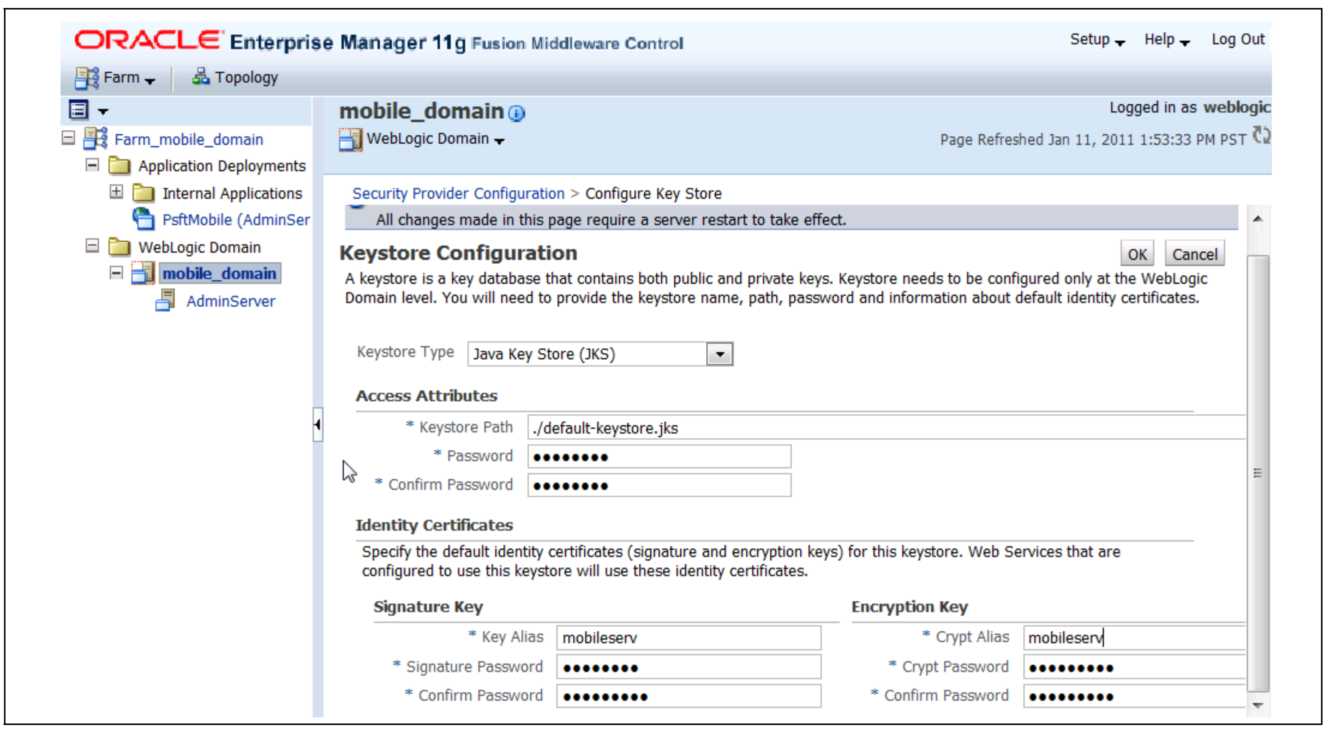
The Oracle Enterprise Manager - Security Provider Configuration page appears, as shown in the following example:



Oracle Enterprise Manager - Security Provider Configuration page

3. On the Security Provider Configuration page, expand the Keystore section and click the Configure button.

   The Oracle Enterprise Manager - Keystore Configuration page appears, as shown in the following example:



Oracle Enterprise Manager - Keystore Configuration page

4. On the Keystore Configuration page, do the following:

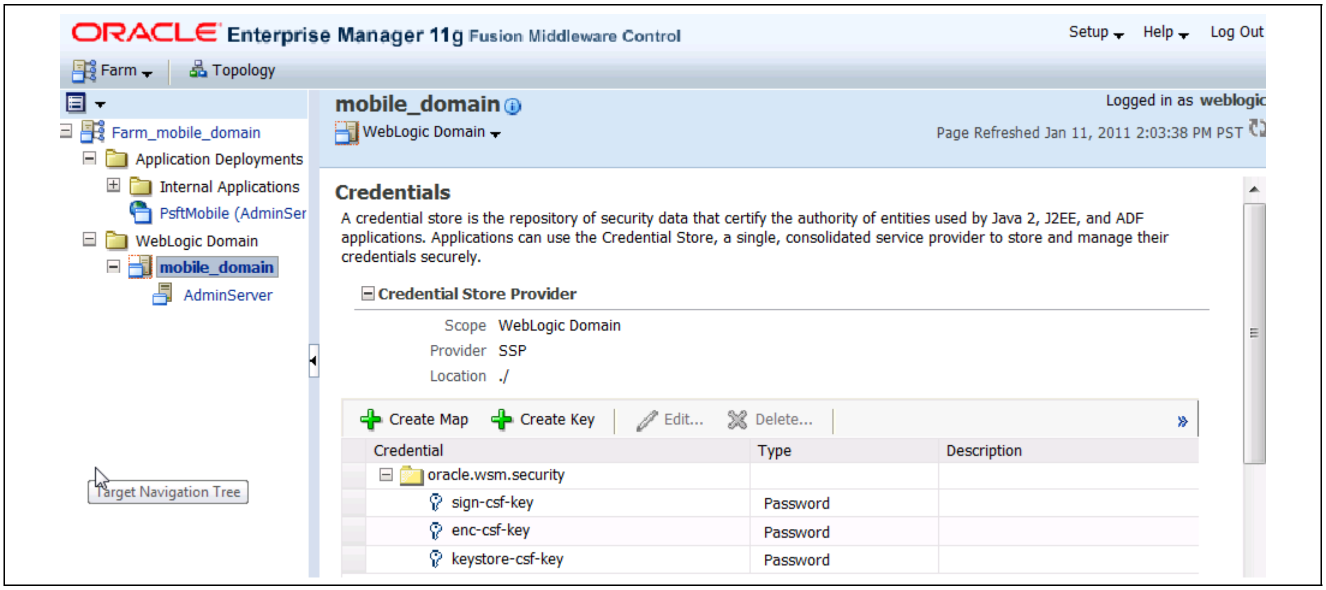
- In the Keystore Type field, select *Java Key Store (JKS)* from the drop-down list box.
- In the Keystore Path, enter *./default-keystore.jks*.

  The signature and encryption key should be *mobileserv*.
- In the Password field, enter the password to create the keystore in previous steps.

  The appropriate passwords used to import the certificates should be provided.

5. Access the Credentials page by selecting the domain, then from the menu select Security, Credential.

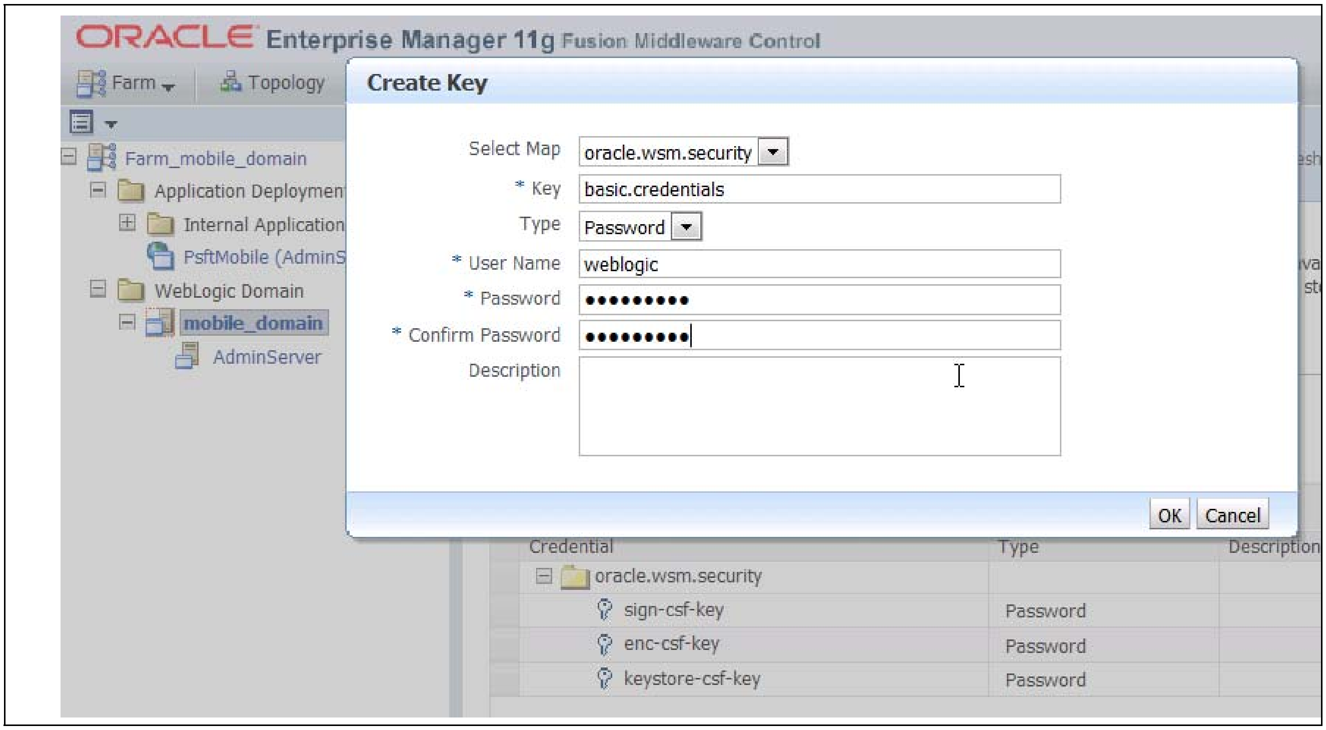
   The Oracle Enterprise Manager - Credentials page appears displaying the Credential Store information, as shown in the following example:



Oracle Enterprise Manager - Credentials page

6. On the Credentials Store page, notice that the oracle.wsm.security credential was created as part of the keystore configuration in the previous step.
7. Click the +Create Key button to create a new key.

   The Create Key dialog box appears, as shown in the following example:



Oracle Enterprise Manager - Credentials page: Create Key dialog box

8. In the Create Key dialog box, do the following:
   - In the Key field, enter *basic.credentials*.
   - In the User Name field, enter *weblogic*.
   - In the Password field, enter a password.
   - In the Confirm Password field, enter the password again for confirmation.
   - Click OK.
9. Restart the PeopleSoft Mobile Inventory Management server for your changes to take effect.

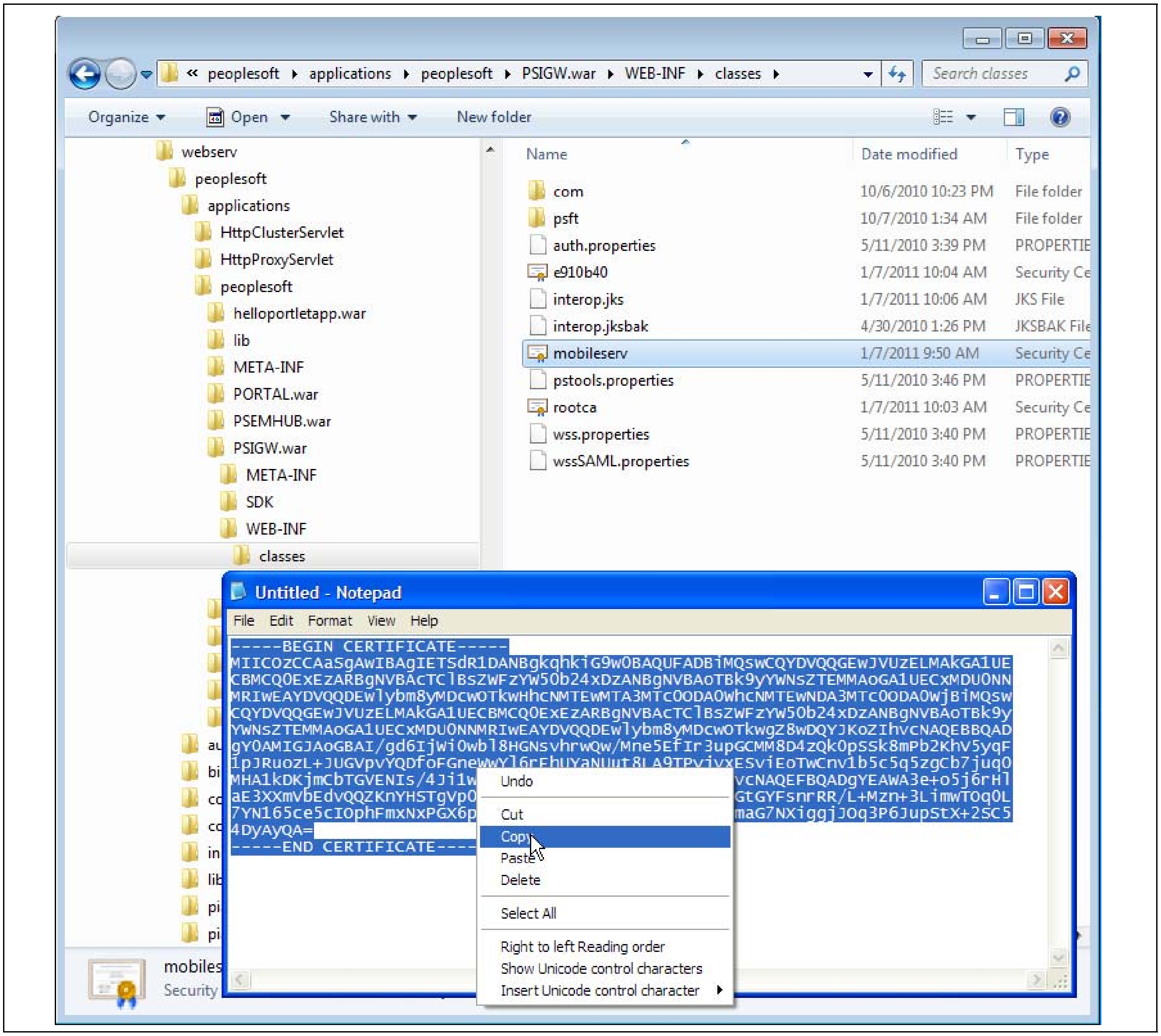
Task 23-1-5: Adding the SAML Definition Information to the PeopleSoft System

To add the SAML definition information to the PeopleSoft system:

1. Locate the mobileserv.cer file in the following subdirectory:

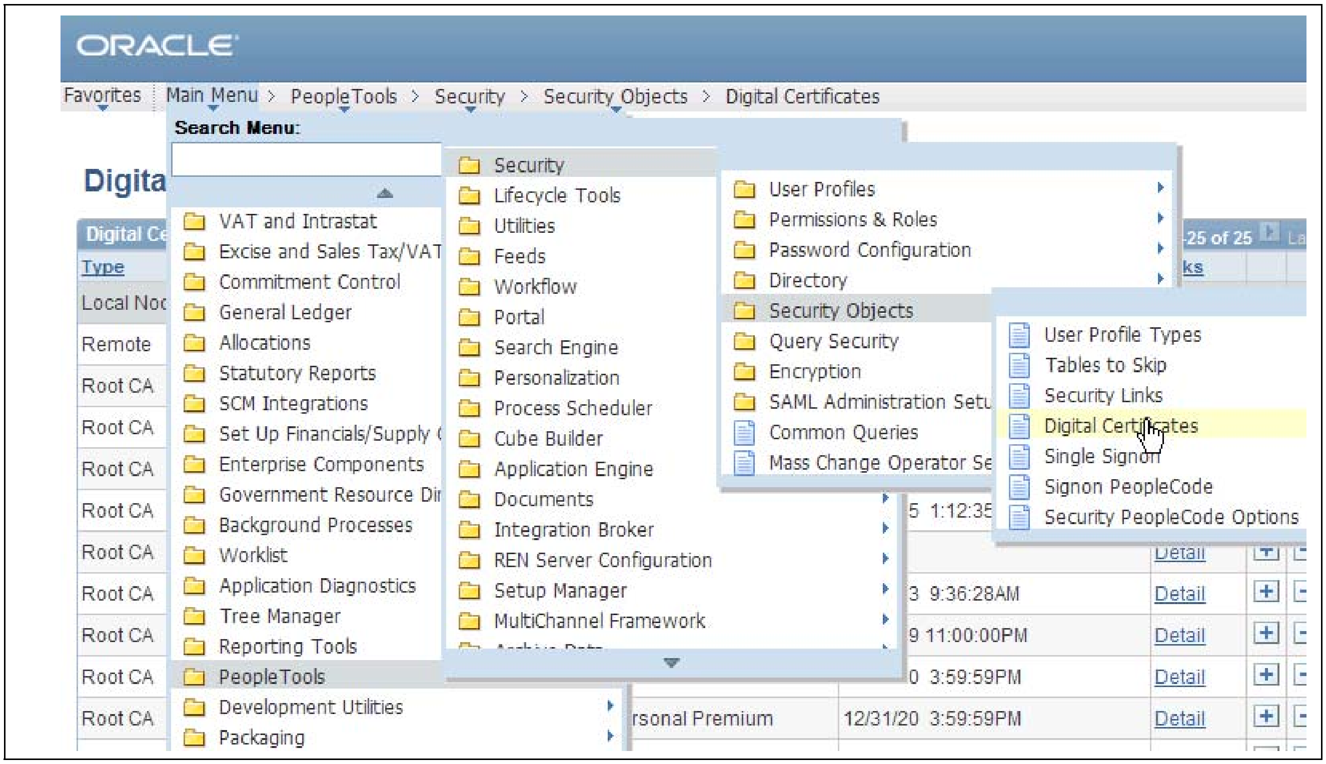
   PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

   For the next few steps, refer to the following example that shows the navigation to the mobileserv.cer file and the digital certificate in a text editor:



PeopleSoft - Navigation to mobileserv.cer file and digital certificate open and highlighted in text editor

2. Using a text editor, open the mobileserv.cer file.
3. In the text editor, highlight the certificate and copy it to the clipboard.
4. Log on to the PeopleSoft system and access the digital certificate page by selecting PeopleTools, Security, Security Objects, Digital Certificates, as shown in the following navigation example:



PeopleSoft system - Navigation to digital certificate

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

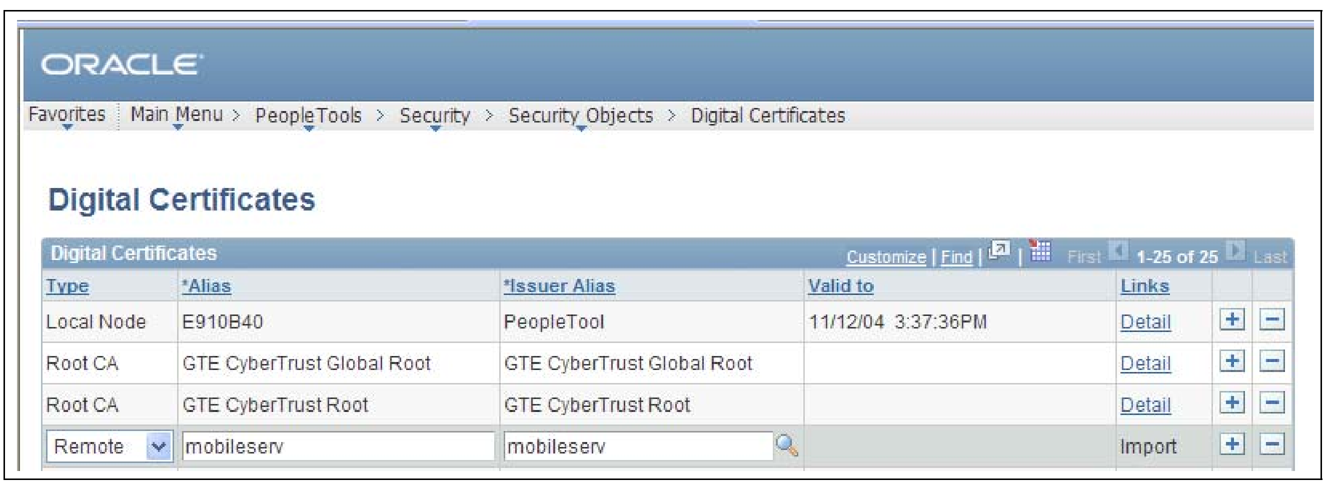
PeopleSoft Digital Certificates page

5. On the Digital Certificates page, click the Add (+) button to add a new certificate.
6. Add the mobileserv digital certificate RootCA.
7. Click the Add Root link to access the Add Root Certificate page, as shown in the following example:

PeopleSoft Digital Certificates - Add Root Certificate page

8. Paste the contents of the clipboard into the dialog area and click OK.
9. Click the Refresh button to save the entry.

   The system returns you to the Digital Certificates page, as shown in the following example:



PeopleSoft Digital Certificates page

10. On the Digital Certificates page, click the Add (+) button to add a new certificate.

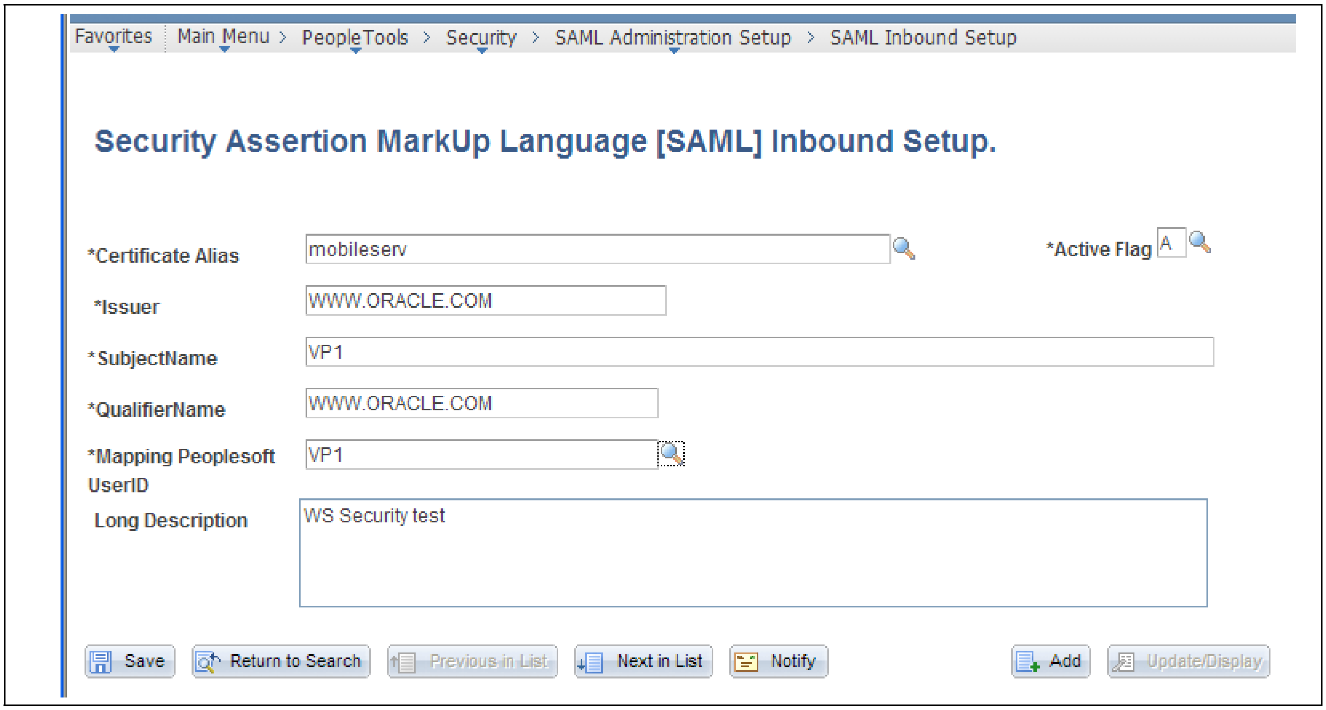
    This certificate will be remote.

11. Click the Detail link next to the remote certificate and copy the contents of the clipboard into the text area for the remote certificate.

    At this point, the PeopleSoft system identifies the remote certificate mobileserv and defines the RootCA as well.

    The example here assumes a self-signed certificate. If the certificate that you are using was issued by a certificate authority, then the RootCA should point to the appropriate root.

12. Select PeopleTools, Security, SAML Administation Setup, SAML Inbound Setup to access the Security Assertion Markup Language (SAML) Inbound Setup page, as shown in the following example:



PeopleSoft Security Assertion Markup Language (SAML) Inbound Setup page

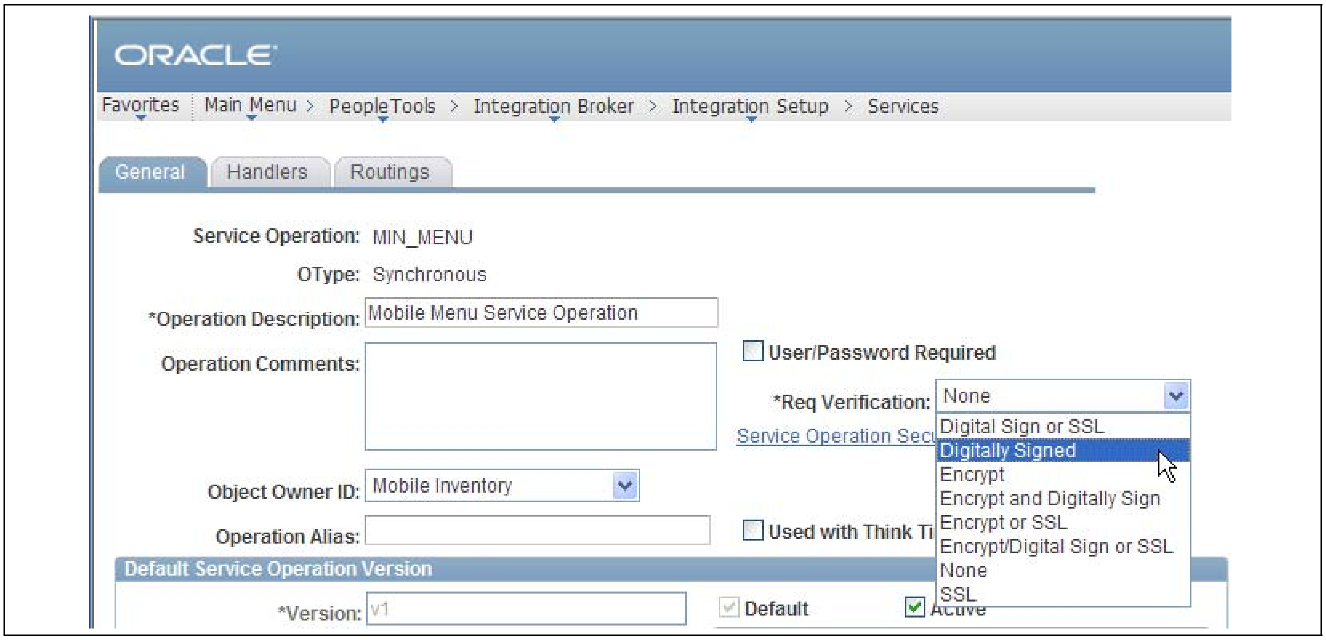
13. On the Security Assertion Markup Language (SAML) Inbound Setup page, add a new entry for the PeopleSoft Mobile Inventory Management server certificate. The issuer defaults on the PeopleSoft Mobile Inventory Management web server as www.oracle.com and did not change.

14. In the SubjectName field, enter a user of the Mobile system.

    You must add a new entry for each mobile user.

15. In the Mapping PeopleSoft UserID field, enter the same user of the Mobile system that you entered in the preceding step.

16. To enforce policies (optional), select PeopleTools, Integration Broker, Integration Setup, Services to access the Service Operations - General page, as shown in the following example:



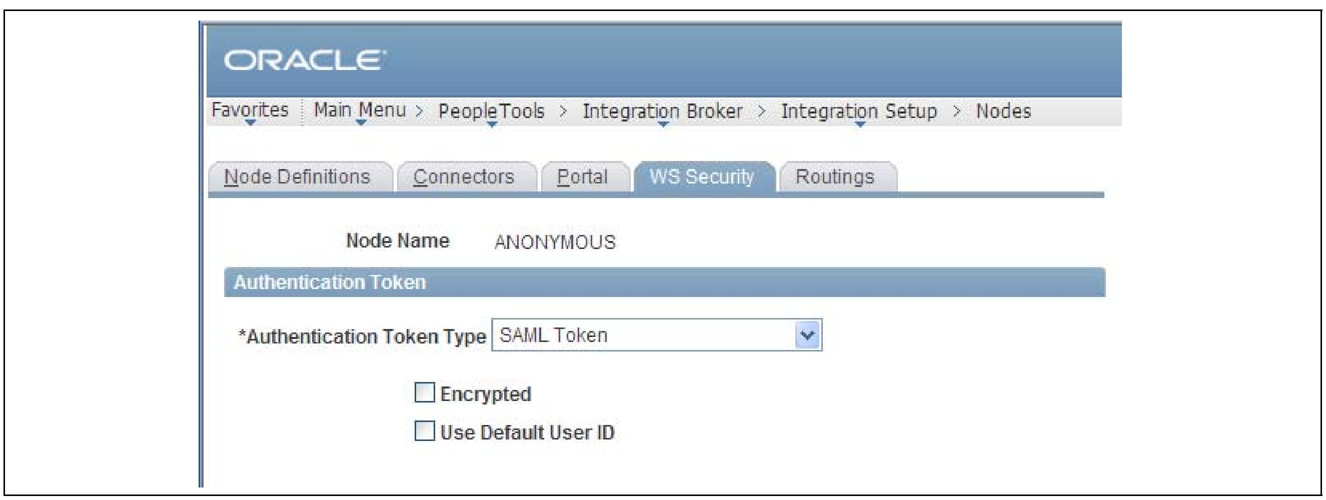
PeopleSoft Service Operations - General page

Enforcing policies on the PeopleSoft side is done at the service operation. This is an optional step that you can perform to better secure your environment.

17. Open the service operation and in the Req Verification field, select the appropriate policy enforcement from the drop-down list box.

    For example: *Digitally Signed*

18. Select PeopleTools, Integration Broker, Integration Setup, Nodes to access the WS Security page, as shown in the following example:



PeopleSoft Nodes - WS Security page

19. On the Nodes - WS Security page, select SAML Token from the Authentication Token Type drop-down list box. This changes the Anonymous Node to identify the SAML Token Authentication Type.

    This is applied to all web services. Alternatively, you can do this at the routing level for each web service with SAML Authentication Type.

20. Modify the wssSAML.properties file that is in the following subdirectory: PSHome\webserv\peoplesoft \applications\peoplesoft\PSIGW.war\WEB-INF\classes

Change the Issuer and subjectNameID.qualifier to www.oracle.com, as shown in the following example:

```
org.apache.ws.security.saml.issuerClass=com.peoplesoft.pt.security.wss.action.PSSAMLIssuerImpl
org.apache.ws.security.saml.issuer=www.oracle.com
org.apache.ws.security.saml.subjectNameId.qualifier=www.oracle.com
org.apache.ws.security.saml.authenticationMethod=password
org.apache.ws.security.saml.confirmationMethod=senderVouches
```

wssSAML.properties file

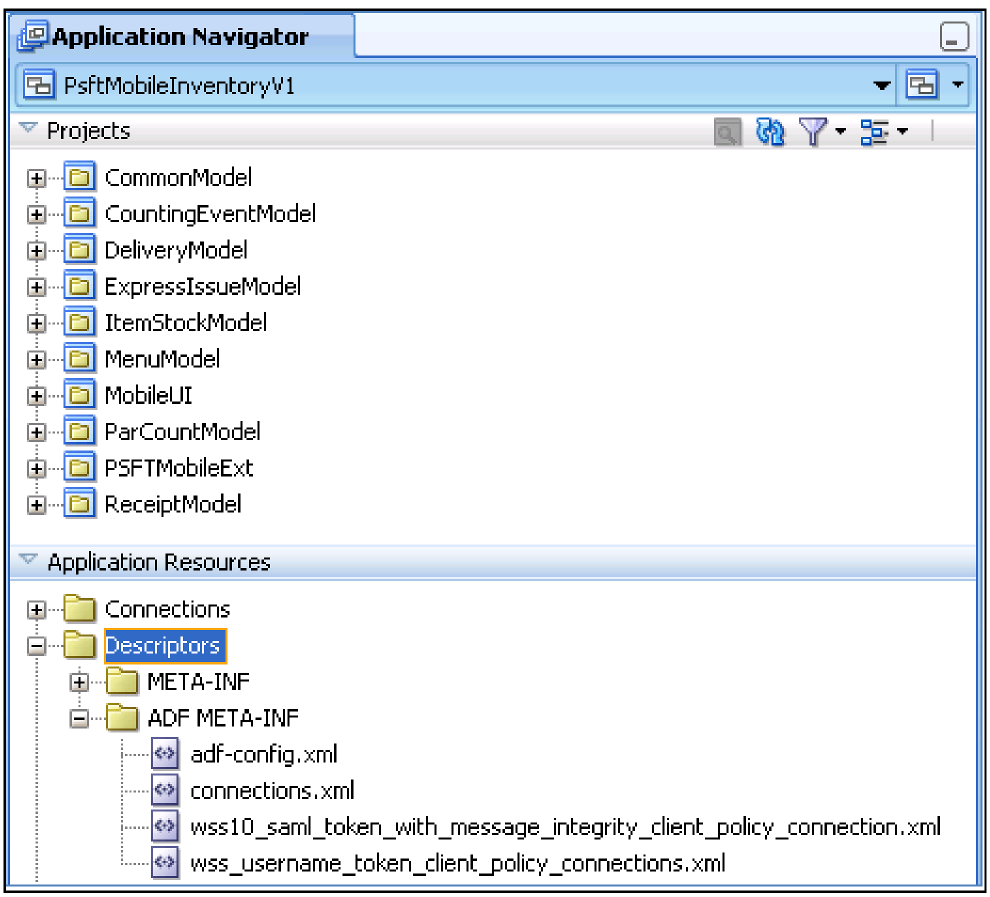
Task 23-1-6: Updating the connections.xml to Enforce Security Policies

You can only perform this step *after* you create a customization environment that you base on the source files that Oracle delivers. If you have not already done so, follow the instructions in the chapter titled “Creating and Deploying a Customization Environment” to create this environment, then return here and proceed with this step.

Oracle delivers the connections.xml file without any security policies. You can update the connections.xml file in the PeopleSoft Mobile Inventory Management application to include client security policies.

To update the connections.xml to enforce security policies:

1. Open the PeopleSoft Mobile Inventory Management application in JDeveloper, and then open the Application Resources section and expand the Descriptors and ADF META-INF sections, as shown in the following example:

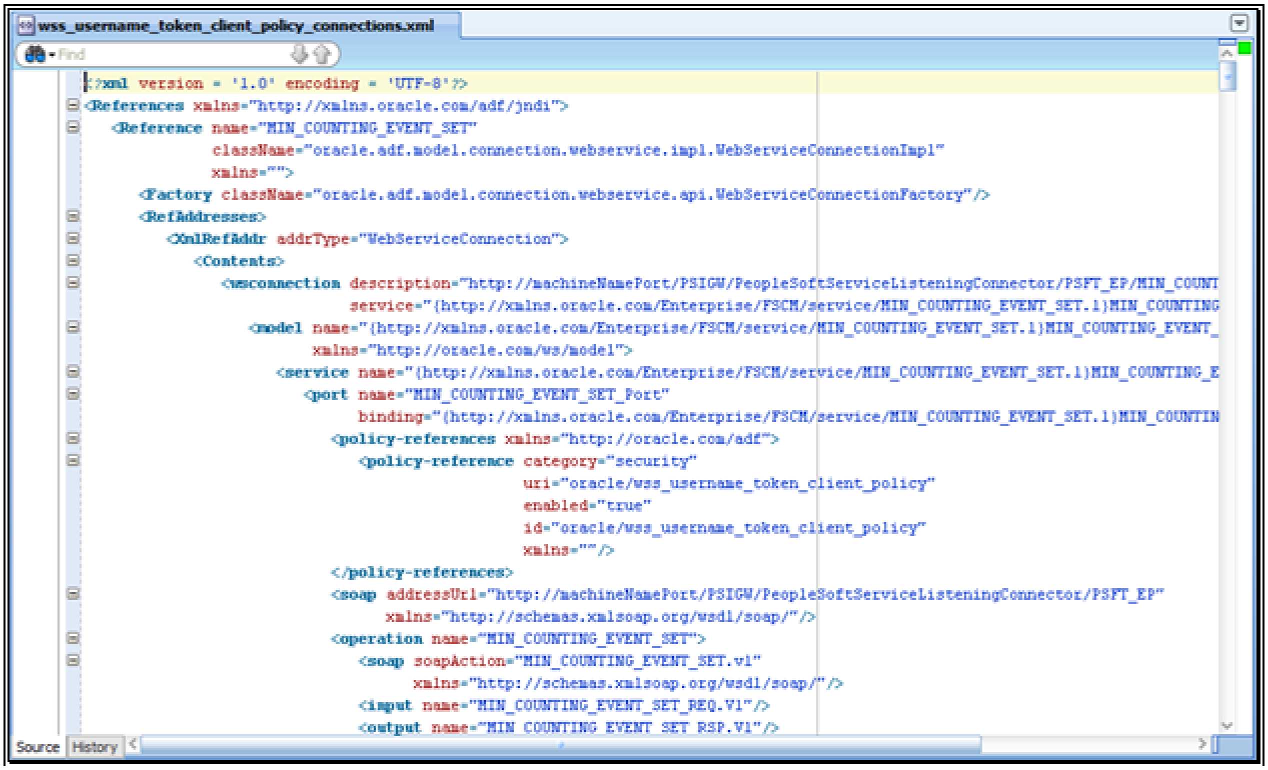


PeopleSoft Mobile Inventory Management - Navigation to locate the connections.xml file

To add WS-Security to the PeopleSoft Mobile Inventory Management application, you must attach a security policy to each service.

2. Determine which policy you want to use, then double-click the connections file to open.

   The file should open as shown in the following example:



Example of connections.xml file

3. Select the entire content of the file using Ctrl-A or Select All from the Edit menu. Then copy the content into the clipboard (Ctrl-C or Copy from the Edit menu).

4. Double-click the connections.xml file to open. Then select the entire content of the file (Ctrl-A or Select All from the Edit menu). Paste the content of the clipboard into this file, entirely replacing the content (Ctrl-V or Paste from the Edit menu).

5. Save the file.

6. After you make these changes, you must redeploy the PeopleSoft Mobile Inventory Management system to the web server that you previously configured in the installation.

Note. In the future, when you receive new source file updates, the connections.xml file may be overwritten. Repeat these steps to reinstate the correct security policy.

CHAPTER 24

Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management

This chapter discusses:

- Understanding the Customization Environment for PeopleSoft Mobile Inventory Management
- Prerequisites
- Creating a Customization Environment for PeopleSoft Mobile Inventory Management

Understanding the Customization Environment for PeopleSoft Mobile Inventory Management

The PeopleSoft Mobile Inventory Management application is built using Oracle Application Development Framework (ADF). Oracle ADF uses a customization methodology that you should follow when making customizations to the PeopleSoft Mobile Inventory Management application. Oracle's methodology implements customizations in a way that does not change the source files. Therefore, Oracle can deliver future updates to the original source files without requiring you to reapply the customizations.

Prerequisites

Before you begin, ensure that you meet the following requirements:

- You have access to the source files that Oracle delivers.

  These source files are in the file PsftMobileInvCustom.zip, in the <PS_APP_HOME>\setup\oracle\adf \MobileInventory directory.

- You have access to the latest version of Oracle JDeveloper 11gR1 (11.1.1.4 or higher, Oracle JDeveloper 11gR2 is not yet supported).

Task 24-1: Creating a Customization Environment for PeopleSoft Mobile Inventory Management

This section discusses:

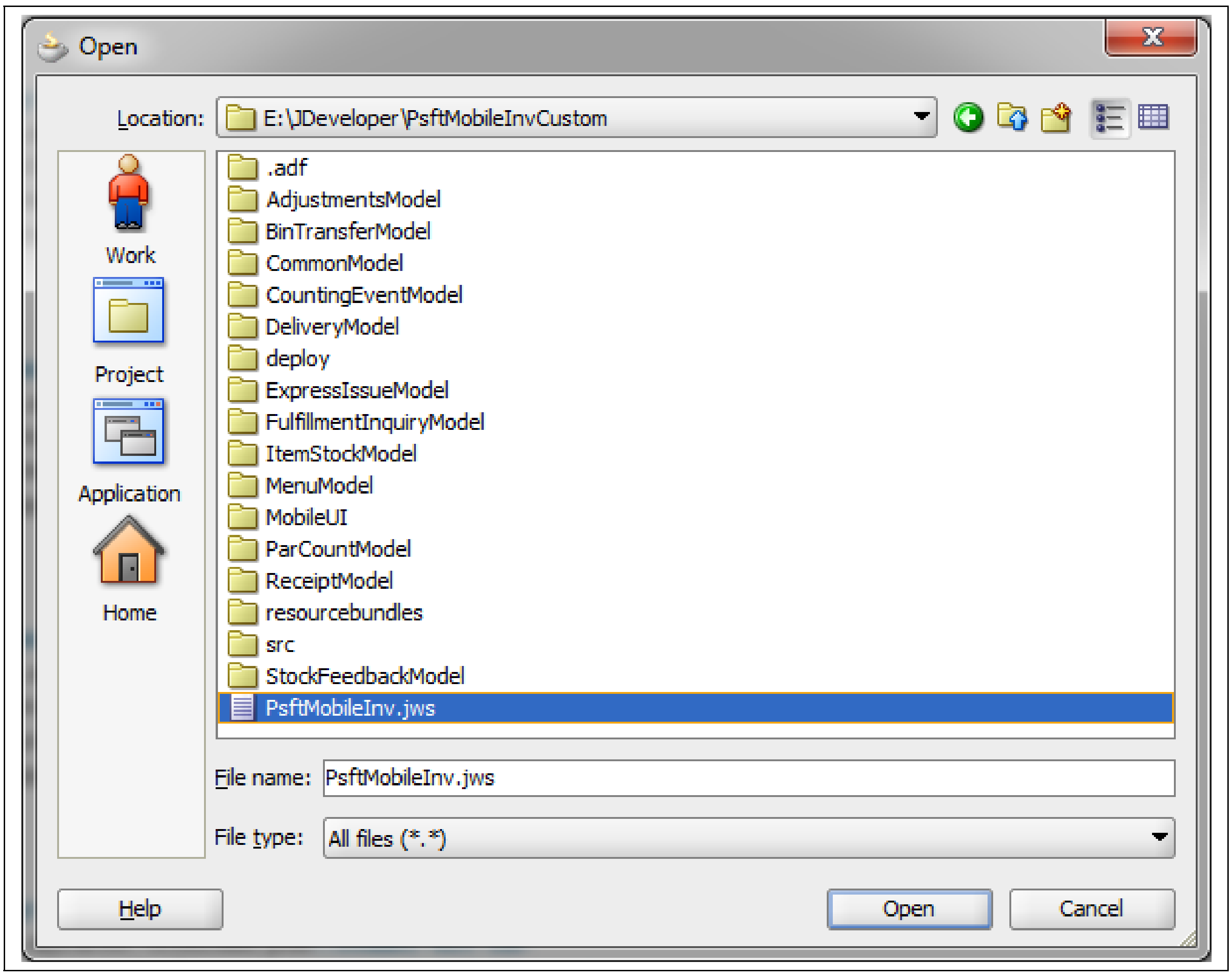
- Creating the Customization Environment
- Creating the Customization EAR File

Task 24-1-1: Creating the Customization Environment

To create an environment to customize, you must unzip the source files into a directory of your choice. After you unzip the source files, you can open the application in Oracle JDeveloper using the steps that follow.

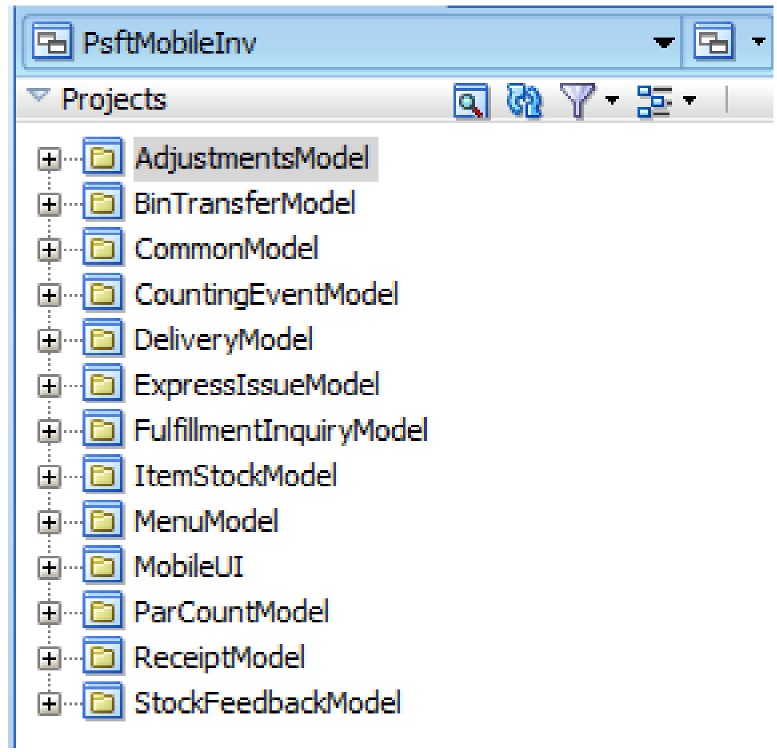
To create the customization environment:

1. In Oracle JDeveloper, select File, Open.
2. In the Open Applications dialog box, look for your source directory, open the PsftMobileInvCustom directory and select the PsftMobileInv.jws file, as shown in the following example:



Open Applications dialog box

The PeopleSoft Mobile Inventory Management application now appears in the Application Navigator, as shown in the following example:



Application Navigator

You can now use the connections.xml file to make customizations.

3. After you create the customization environment, the process changes slightly for subsequent source files that Oracle delivers. You still unzip the application files to the same directory; however, one of the files requires special treatment.

   Oracle delivers the connections.xml file without any security association. In an earlier step in the chapter titled "Installing PeopleSoft 9.1 Mobile Inventory Management" of this installation guide, you are instructed to replace the generic connections file with one that is specific to your security setup. When you unzip the source files after the initial setup, the specific connections file that you specified in that step is overwritten by the generic file. Therefore, you need to replace the generic file with the specific security file that you are using.

   Instructions that detail this procedure are in the chapter titled "Configuring WS-Security for PeopleSoft Mobile Inventory Management" of this installation guide.

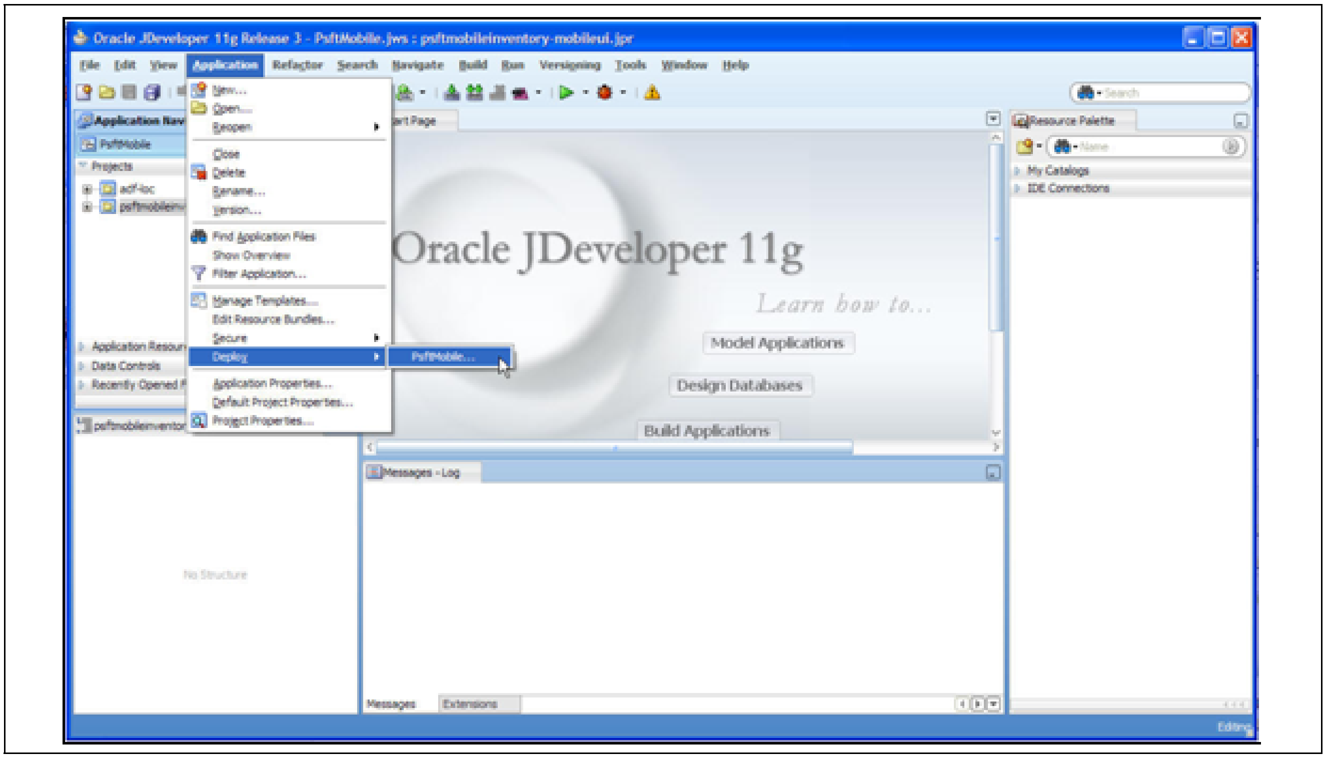
   See "Updating the connections.xml to Enforce Security Policies."

Task 24-1-2: Creating the Customization EAR File

After you make the changes in the previous step, you must redeploy the customizations for the changes to take effect. To deploy the customized version, you must create an EAR file of the custom application.

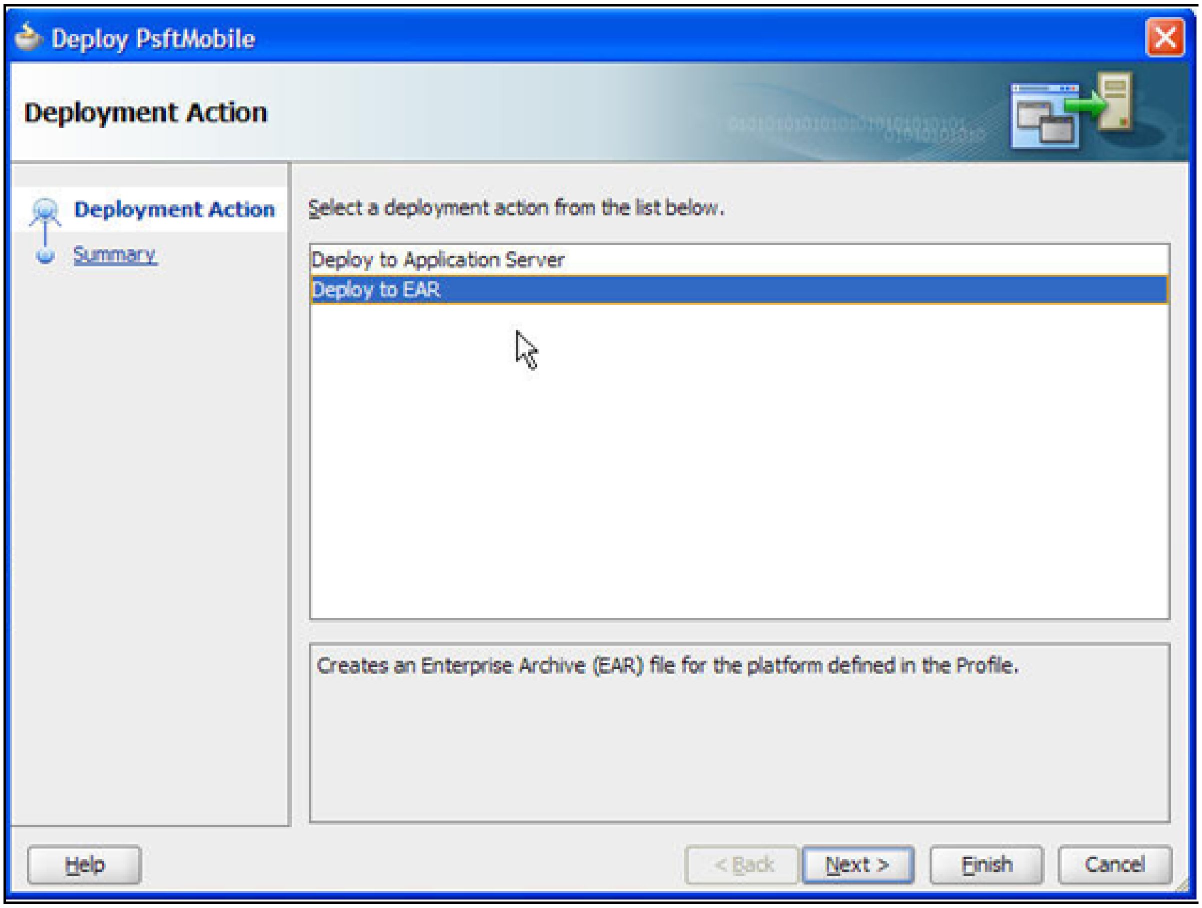
To create an EAR file of the custom application to deploy to the application server:

1. Start with the customized application open in Oracle JDeveloper.
2. From the Oracle JDeveloper menu, select Application, Deploy, as shown in the following example:



Oracle JDeveloper menu

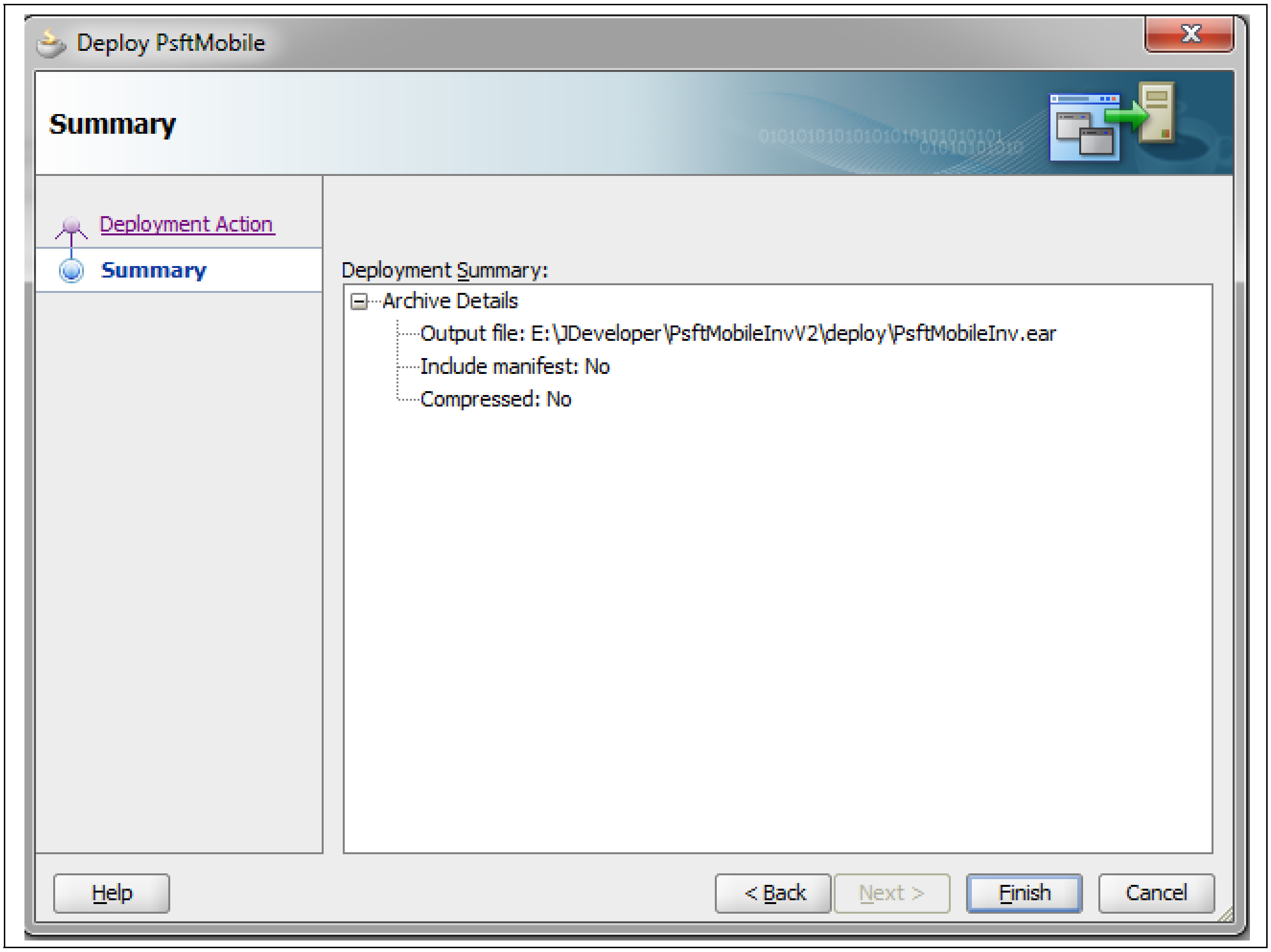
The Deployment Action page opens, as shown in the following example:



Oracle JDeveloper - Deployment Action page

3. On the Deployment Action page, select Deploy to EAR and then click Next.

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



Oracle JDeveloper - Summary page

On the Summary page, the final details of the deployment file are given and include the path and file name where the system creates the EAR file.

4. Click Finish to create the EAR file.

   You can now deploy and configure the file on the application server.

CHAPTER 25

Configuring eMail URLS in PeopleSoft SCM Applications

This chapter discusses:

- Understanding eMail Configuration in PeopleSoft SCM Applications
- Configuring eMail URLs for Item Loader Exceptions
- Configuring eMail URLs for Supplier Facing Applications
- Configuring eMail URLs for PeopleSoft eBill Payment

Understanding eMail Configuration in PeopleSoft SCM Applications

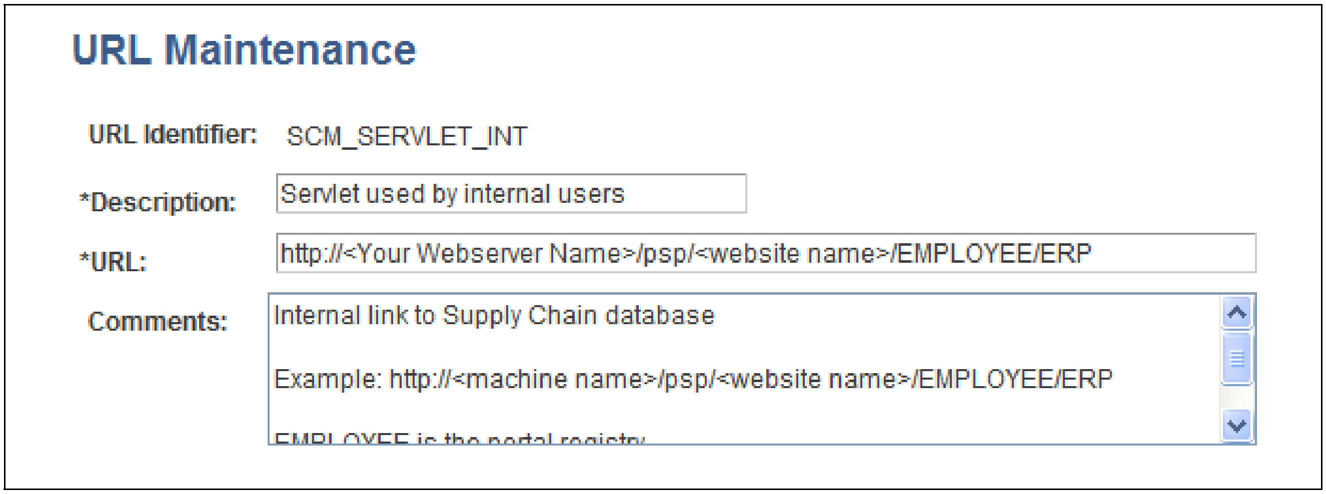
Some products in PeopleSoft Supply Chain Management (SCM) can send out email notifications containing web addresses (URLs) that enable your employees and external parties to link back to your website. For emails to contain the correct embedded URLs to PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft eProcurement pages, you must edit the URL discussed in this section.

Task 25-1: Configuring eMail URLs for Item Loader Exceptions

Modify SCM_SERVLET_INT to point to an internal server that is used to access the PeopleSoft SCM database. This URL is used to create standard PeopleSoft Internet Architecture links for internal users such as employees to access pertinent components and pages.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *SCM_SERVLET_INT*.
3. On the URL Maintenance page, in the URL field, edit the URL to point to an internal server to access the supply chain database, as shown in the following example:



URL Maintenance page for SCM_SERVLET_INT

4. Click Save.

Task 25-2: Configuring eMail URLs for Supplier Facing Applications

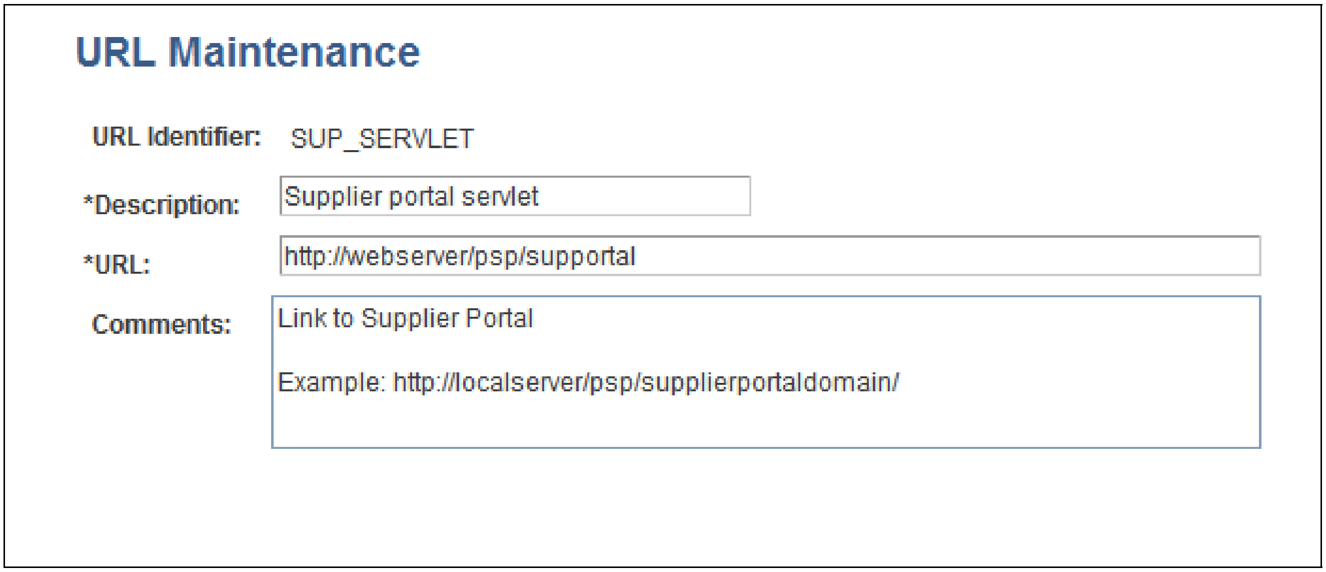
The information in this section applies to PeopleSoft eSupplier Connection, Collaborative Supply Management, Supplier Contract Management, Strategic Sourcing, and Services Procurement.

You need to modify EMP_SERVLET and SUP_SERVLET to point to the correct servers used to access the PeopleSoft SCM database. These are needed when not using an Enterprise Portal as there is no other way to identify the different web servers used for the Employee or Supplier side.

To set up these URLs:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *SUP_SERVLET*.
3. On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the supply chain database.

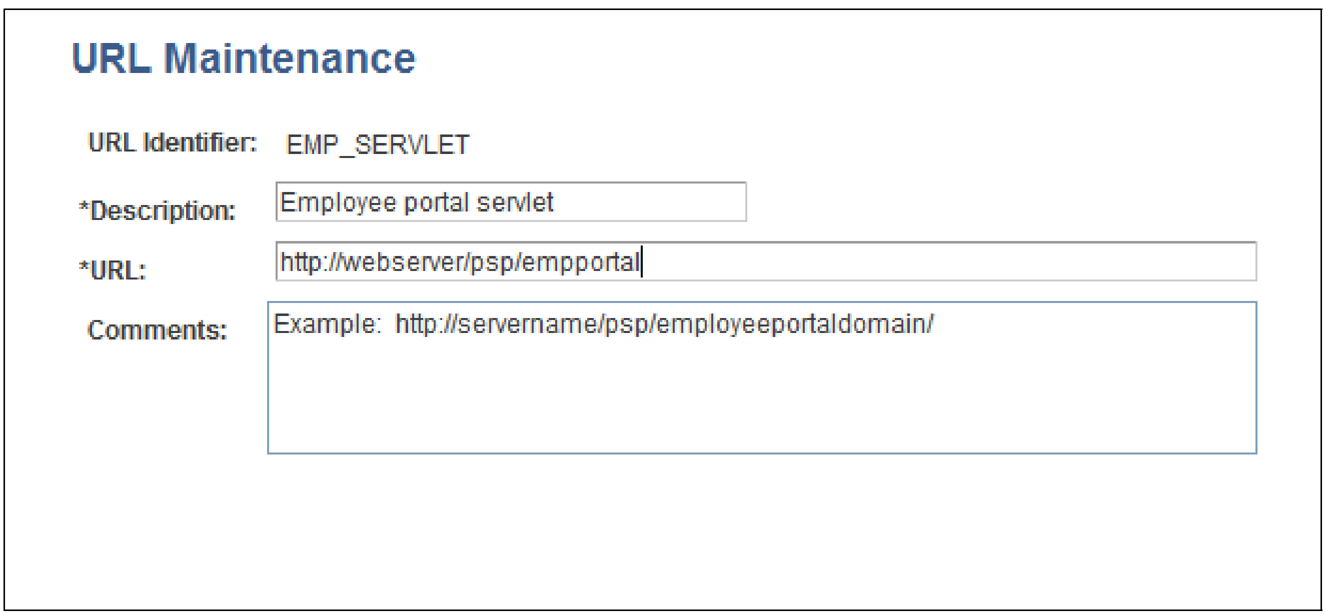
   That is, the server that the suppliers use to log on to the SUPPLIER registry, as shown in the following example:



URL Maintenance page for SUP_SERVLET

4. Click Save.
5. Click Return to Search.
6. On the URL search page, search for the URL identifier *EMP_SERVLET*.
7. On the URL Maintenance page, in the URL field, edit the URL to point to an INTERNAL server to access the supply chain database.

   That is, the server that the employees use to log on to the EMPLOYEE registry, as shown in the following example:



URL Maintenance page for EMP_SERVLET

8. Click Save.

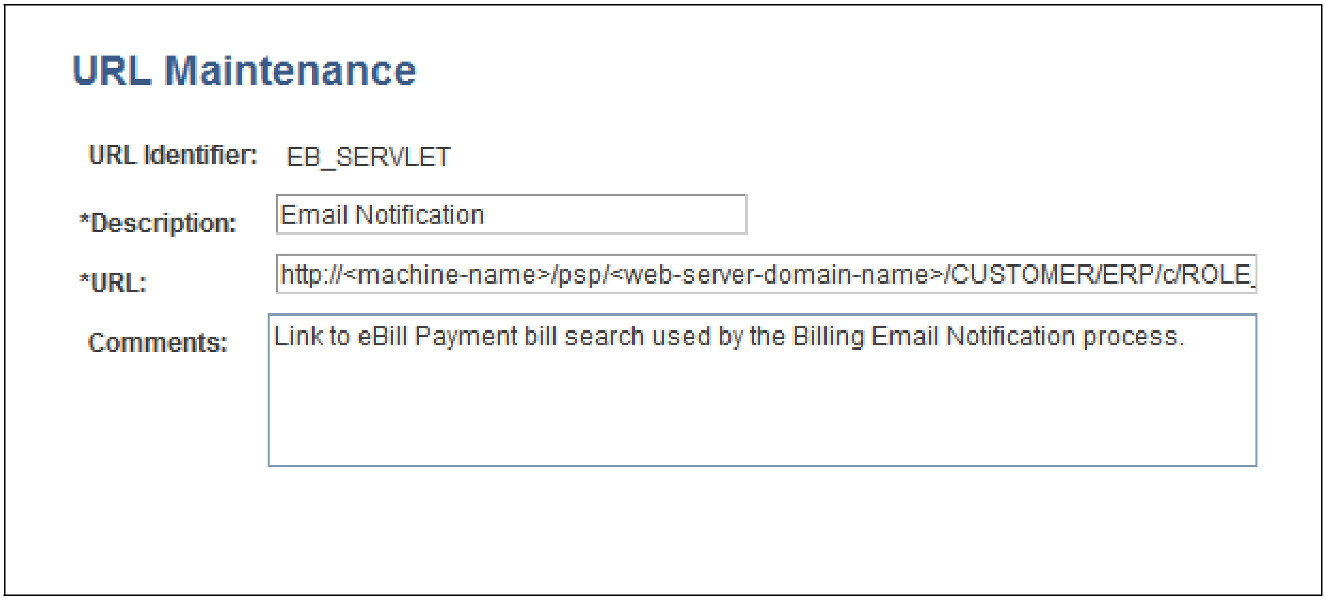
Task 25-3: Configuring eMail URLs for PeopleSoft eBill Payment

You need to modify the EB_SERVLET to point to the correct server used to access the PeopleSoft SCM database for the CUSTOMER registry. This is needed so that PeopleSoft Billing can generate the correct link to the eBill Payment components.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *EB_SERVLET*.
3. On the URL Maintenance page, in the URL field, edit the URL field to point to an EXTERNAL server to access the supply chain database.

   That is, the server that your customers use to log on to the CUSTOMER registry, as shown in the following example:



URL Maintenance page for EB_SERVLET

4. Click Save.

CHAPTER 26

Setting Up PeopleSoft 9.1 Supplier Contract Management

Understanding the PeopleSoft 9.1 Supplier Contract Management Setup

Only perform this task if you use PeopleSoft Supplier Contract Management. For complete installation of Supplier Contracts, refer to the PeopleSoft Supplier Contract Management PeopleBook.

To use PeopleSoft Supplier Contract Management you must set up a database or FTP file server and have Microsoft Word 2007 or higher installed on at least one client. Refer to the section “Setting Up Supplier Contract Attachment Servers and Directories” in the following reference.

See *PeopleSoft Supplier Contract Management 9.1 PeopleBook,* "Setting Up PeopleSoft Supplier Contract Management."

Further setup is detailed in the same chapter of the PeopleSoft Supplier Contract Management 9.1 PeopleBook for the following:

- Setup of a Microsoft Word template.

  See Defining Document Templates and Styles.

- Optional setup for individual clients to allow certain users to look up clauses and bind variables in the PeopleSoft database from within Microsoft Word 2007 using Microsoft Research task pane functionality.

  See Setting Up PeopleSoft Integration Broker and Microsoft Word Configuration Files, Installing and Configuring Microsoft Word Components on Workstations.

- Optional setup to allow users to do server side compares of Word documents, and optional dispatch of contracts to suppliers in a .doc or .pdf format (versus the default .xml format).

  See Defining Installation Options for Supplier Contract Management.

- Optional installation setup for Verity.

  See Defining Installation Options for Supplier Contract Management.

- Optional installation setup for workflow.

  See Defining Installation Options for Supplier Contract Management.

- Optional installation setup for Syndication.
- Optional setup that enables documents to use digital signatures (Adobe or Microsoft Word 2007 or higher).

  See Defining Installation Options for Supplier Contract Management.

Chapter 27

Setting Up PeopleSoft SCM Pagelets

This chapter discusses:

- Accessing Pagelets
- Enabling Pagelet Creation and Access with Portal Utilities

Task 27-1: Accessing Pagelets

You can access pagelets within the PeopleSoft 9.1 Supply Chain Management application databases. Scripts must be applied to your database to allow access to the pagelet configuration homepage.

Note. You must complete the following steps for both the System and Demo databases unless otherwise indicated.

To add, remove, or change the layout of the homepage, you must grant homepage personalization security access to all non-guest users. To update the homepage personalization permission list, use PeopleSoft Data Mover to run the `PORTAL_HP_PERS.DMS` script. To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the `PORTAL_ADD_ROLE.DMS` script. Both scripts are in <PS_APP_HOME>\scripts.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, you should manually remove the role PAPP_USER from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 27-2: Enabling Pagelet Creation and Access with Portal Utilities

Use PeopleSoft Data Mover to run the `EOPP_PORTAL_PACK.DMS` script in <PS_APP_HOME>\scripts. This script enables you to create and view pagelets using the Enterprise Components Portal Utilities.

Note. Only perform this task if you are licensed for the PeopleSoft Supply Chain Portal Pack or Enterprise Portal.

CHAPTER 28

Granting Access to Navigation Pages in PeopleSoft SCM

Task 28-1: Adding User Roles to All User IDs

To access the navigation pages, you must grant security to the Navigation Page IScripts to all users. To add the EOPP_USER role to all users, use PeopleSoft Data Mover to run the `EOPP_ADD_ROLE.DMS` script in <PS_APP_HOME>\scripts.

Note. When you create a new user ID, you should add the EOPP_USER role to the new user ID.

CHAPTER 29

Accessing PeopleSoft Financials, ESA, and SCM Applications in PeopleSoft 9.1 Portal Solutions

Task 29-1: Accessing PeopleSoft Applications

Only perform this task if you use the PeopleSoft Portal Solutions product and want to access your application from within the PeopleSoft Applications Portal database.

The installation phase of your PeopleSoft application should only entail setting up a single link to the PeopleSoft application content provider. To set up the single link and the single sign on, see the *PeopleSoft Portal Solutions 9.1 Installation* documentation on My Oracle Support. Chapter “Installing PeopleSoft Single Sign-On” discusses setting up single sign on to your application database. Chapter “Accessing PeopleSoft Content Providers” discusses accessing the PeopleSoft content providers. The appendix chapters discuss additional product-specific steps that you may need to perform for fully functional navigation within the PeopleSoft Applications Portal database.

See *PeopleSoft Portal Solutions 9.1 Installation.*

APPENDIX A

Configuring PeopleSoft 9.1 Asset Management with eCenterOne Space Management Solution

Use these values when integrating PeopleSoft Asset Management with eCenterOne Space Management.

The following table lists ECenterOne Connector Properties (N/A = Not Applicable):

*Property ID	*Property Name	Required	Value	Default
ECENTERONETARGET	eCenterOne URL	Y	N/A	Y
ECENTERONETARGET	Username	Y	N/A	Y
ECENTERONETARGET	Password	Y	N/A	Y
ECENTERONETARGET	Database	Y	N/A	Y
ECENTERONETARGET	Email	N	N/A	N
ECENTERONETARGET	Asynchronous	Y	true	Y
ECENTERONETARGET	Native	Y	false	Y
ECENTERONETARGET	Message Name	N	N/A	N
ECENTERONETARGET	XSLT File Name	N	N/A	N
HEADER	sendUncompressed	Y	N	Y

The following table lists the PeopleSoft-delivered NODE Transactions for PSFT_XOUTBND Node:

Transaction Type	Request Message	Request Message Version
OutAsync	ADD_EMP_PUB	VERSION_1
OutAsync	ADD_PROP_PUB	VERSION_1
OutAsync	SYN_DEPT_HIER_PUB	VERSION_1
OutAsync	SYN_EMP_PUB	VERSION_1
OutAsync	UPD_EMP_PUB	VERSION_1
OutAsync	UPD_PROPID_PUB	VERSION_1
OutSync	LST_DELETEDPROPS_REQ	VERSION_1
OutSync	LST_NEWPROPS_REQ	VERSION_1
OutSync	UPD_EMPLOC_REQ	VERSION_1
OutSync	UPD_PROP_REQ	VERSION_1

Note. The following properties *must* be configured for PSFT_XOUTBND Node Transaction Connector Properties, otherwise the integration does *not* work properly.

The following table lists Properties for Asynchronous Node Transactions:

*Property ID	*Property Name	Value
ECENTERONETARGET	Asynchronous	true
ECENTERONETARGET	Native	false
HEADER	sendUncompressed	Y

The following table lists Properties for Synchronous Node Transactions:

*Property ID	*Property Name	Value
ECENTERONETARGET	Asynchronous	false
ECENTERONETARGET	Native	false
HEADER	sendUncompressed	N

The following table lists the PeopleSoft-delivered Transactions for PSFT_XOUTBND RELATIONSHIP (N/A = Not Applicable):

Initial Node	Transaction Type	Request Message Name	Request Transformation	Response Transformation
PSFT_XOUTBND	OA	ADD_EMP_PUB	RE_HRADD_XFM	N/A
PSFT_XOUTBND	OA	ADD_PROP_PUB	RE_PRADD_XFM	N/A
PSFT_XOUTBND	OA	SYN_DEPT_HIER_PUB	RE_DEPT_XFM	N/A
PSFT_XOUTBND	OA	SYN_EMP_PUB	RE_HRSYN_XFM	N/A
PSFT_XOUTBND	OA	UPD_EMP_PUB	RE_HRUPD_XFM	N/A
PSFT_XOUTBND	OA	UPD_PROPID_PUB	RE_PRPID_XFM	N/A
PSFT_XOUTBND	OS	UPD_EMPLOC_REQ	RE_REQ_1_XFM	RE_RES_1_XFM
PSFT_XOUTBND	OS	UPD_PROP_REQ	RE_REQ_2_XFM	RE_RES_2_XFM
PSFT_XOUTBND	OS	LST_NEWPROPS_REQ	RE_REQ_3_XFM	RE_RES_3_XFM
PSFT_XOUTBND	OS	LST_DELETEDPROPS_REQ	RE_REQ_4_XFM	RE_RES_4_XFM

APPENDIX B

Configuring PeopleSoft 9.1 IT Asset Management with Network Discovery Systems

Use these values when integrating PeopleSoft 9.1 IT Asset Management with Network Discovery Systems.

The following table lists HTTPTARGET Connector Properties:

*Property ID	*Property Name	Required	Value	Default
HEADER	sendUncompressed	Y	Y	Y
HTTPPROPERTY	Method	Y	Post	Y
PRIMARYURL	URL	Y	http://<LocalHost> /<DiscoveredInventorySystem> /<ConnectorName>	N

The following table lists PeopleSoft-delivered routing definitions for PSFT_EP Node:

Routing Type	Request Message	Request Message Version
Async	GET_DISCOVERYDATA	VERSION_1
Async	GET_DISCOVERYDATA_LCL	VERSION_1
Async	GET_DISCOVERYDATA_ACK	VERSION_1
Async	GET_DISCOVERYDATA_STATUS_ACK	VERSION_1

Index

M

N

O

T

U

V

W