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PEOPLESOFT

PeopleSoft Human Capital Management 9.2 Installation

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

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

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 Capital Management
- 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/us/products/applications/peoplesoft-enterprise/index.html> for a list of PeopleSoft Enterprise products.

Related Information

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

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

To access PeopleSoft Online Help (PeopleBooks), go to My Oracle Support and search for the PeopleSoft Online Help (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 Online Help (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

Installing PeopleSoft HCM 9.2 Applications

This chapter discusses:

- Using the Oracle Software Delivery Cloud to Obtain Installation Files
- Preparing for the Installation
- Installing PeopleSoft HCM for Federal Government
- Installing PeopleSoft HCM for Education and Government
- Installing PeopleSoft HCM for the Military
- Installing PeopleSoft HCM for Japan
- Installing PeopleSoft HCM for Switzerland
- Installing PeopleSoft Time and Labor and Creating Time Zone Offsets
- Installing Absence Management and Global Payroll Core
- Installing PeopleSoft HCM Portal Pack
- Installing PeopleSoft Talent Acquisition Manager
- Installing PeopleSoft Global Payroll Country Extensions
- Installing PeopleSoft ePay Payslips for PeopleSoft Global Payroll
- Installing PeopleSoft HR and PeopleSoft Global Payroll PDF Form Files
- Installing Directory Interface
- Installing PeopleSoft PayBill Management
- Installing Service Handlers
- Configuring Global Search Using Oracle Secure Enterprise Search
- Installing Configurable Matrices and Metadata
- Installing PeopleSoft Human Resources for French Public Sector
- Verifying Desktop Integration is Enabled

Using the Oracle Software Delivery Cloud to Obtain Installation Files

Before beginning the installation, you should obtain the PeopleSoft Human Capital Management 9.2 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>

Preparing for the Installation

This section discusses:

- Verifying the PeopleSoft PeopleTools Version
- Verifying the Demo Database Size
- Installing Application Files to the PS_APP_HOME Location
- Running the HCINSSYS.DMS Script
- Verifying the EDM Pool Size for DB2 z/OS
- Modifying the PeopleSoft PeopleTools Install for DB2 z/OS

Verifying the PeopleSoft PeopleTools Version

To run PeopleSoft HCM 9.2, you must be using PeopleSoft PeopleTools 8.53.02 or higher.

Important! This document is *not* a standalone installation guide and does not contain PeopleSoft PeopleTools installation instructions. When installing PeopleSoft HCM, ensure that you use both the PeopleSoft PeopleTools Installation Guide for your database platform and these PeopleSoft HCM installation instructions. The PeopleSoft PeopleTools Installation Guide is available on My Oracle Support.

See *PeopleSoft PeopleTools Installation*, for your database platform and current PeopleTools release.

See My Oracle Support

Note. This chapter provides pre-installation considerations, installation notes and instructions specific to PeopleSoft HCM applications. Installation notes are tips about a specific issue in a product, whereas installation instructions are step-by-step instructions for the installation and configuration of PeopleSoft HCM products.

Verifying the Demo Database Size

The following table lists the minimum PeopleSoft HCM 9.2 Demo database size for each RDBMS platform:

RDBMS Platform	Approximate Database Size
Oracle — Non-Unicode/Unicode	17 GB
DB2/LUW Non-Unicode	26.5 GB

RDBMS Platform	Approximate Database Size
DB2/LUW — Unicode	41.4 GB
DB2 z/OS Non-Unicode	20.7 GB
DB2 z/OS Unicode	22.7 GB
Sybase Non-Unicode	15 GB
Informix Non-Unicode	18 GB
Microsoft SQL Server Non-Unicode	3.5 GB
Microsoft SQL Server Unicode	4.7 GB

Note. If you are using Informix, the sizing of databases in the preceding table is only an example size that holds the demo database tables with one language at installation. You may need to edit this demo database size for some Operating System platforms, based on the default page size.

Important! For more information regarding Sybase and Informix platforms please see Note: 1530919.1 on My Oracle Support.

Installing Application Files to the 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 PeopleSoft Online Help (PeopleBooks) web sites:

See *Oracle's PeopleSoft PeopleTools 8.52 Release Notes*.

See *PeopleSoft PeopleTools Installation*, for your database platform and current PeopleTools release.

See *PeopleTools: System and Server Administration*

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>*.

Running the HCINSSYS.DMS Script

Using PeopleSoft Data Mover, only run this script on the HCM SYS database. You can find the HCINSSYS.DMS script in *<PS_APP_HOME>\scripts*. After running this script, you must log off all clients and shut down and restart all application servers for the changes to take effect.

Verifying the EDM Pool Size for DB2 z/OS

The PeopleSoft installation procedure places all of the tables for the product that you are installing into multiple physical DB2 for z/OS databases, using a shared tablespace methodology. Depending on the application that you are installing, the DB2 subsystem should have a minimum EDM pool size of 6 MB for PeopleSoft HCM 9.2.

Modifying the PeopleSoft PeopleTools Install for DB2 z/OS

For DB2/zOS , when installing PeopleSoft HCM 9.2, the order of steps that you perform in the chapter "Creating a Database" of the PeopleSoft PeopleTools installation guide changes if you are installing a demo database.

See PeopleSoft PeopleTools Installation for DB2 UDB z/OS, "Creating a Database," for your current PeopleTools release.

Before you perform the task *Running PeopleSoft Data Mover Import Scripts*, you must edit the <DBNAME>dbo.dms script. Edit the script <DBNAME>dbo.dms and create two different PeopleSoft DMS scripts from the original.

Note. This modification is necessary because the PeopleSoft HCM 9.2 Demo database has some duplicate data definitions and indexes that you must create before loading the Demo database, to avoid duplicates.

To edit the <DBNAME>dbo.dms script:

1. In <DBNAME>dbo.dms, search for the key word `hcengl.log`.
2. Cut the portion of the script from the line that contains `hcengl.log` to the end of the script and paste it into a different script called <DBNAME>dbo_2.dms.
3. Save the original <DBNAME>dbo.dms script after removing the portion of script from the line that has the key word `hcengl.log` to the end of the script.
4. Verify that the original <DBNAME>dbo.dms script only contains the import from `hcengs.db` and that <DBNAME>dbo_2.dms contains the rest of the import and updates.
5. Run the <DBNAME>dbo.dms script in bootstrap mode.

Perform this step by following the instructions in the task "Running PeopleSoft Data Mover Import Scripts."

See PeopleSoft PeopleTools Installation Guide for DB2 z/OS , "Creating a Database," for your current PeopleTools release.

6. Use the instructions in the task "Creating Indexes" to run the step to create indexes.
7. Use the instructions in the task "Running PeopleSoft Data Mover Import Scripts" to run the <DBNAME>dbo_2.dms script.

Task 1-1: Installing PeopleSoft HCM for Federal Government

This section details the system data setup process that you should use when installing PeopleSoft HCM for the U.S. Federal Government to ensure proper installation of Federal functionality.

To install Federal functionality in a PeopleSoft HCM database:

Note. Run these steps against both the SYS and DMO databases.

1. Select Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Data Federalization.
2. Click the Federalize System Data button, to load the contents of the core tables that contain the Federal Data.
3. When you run the Federalization process, you introduce changes to the Installation Table. The following example shows the informational message that appears “The database was federalized at 2013-01-08-10.26.14.000000.”

Data Federalization Process

Set Federal Data

The database was federalized at 2013-01-08-10.26.14.000000.
You must restart the application server for certain values to take effect.

Set Commercial Data

By selecting this Button, all the data in the following list of tables will be reset to Commercial data.

Data Tables Personalize Find 1-11 of 11

Table Name	Description
ACTION_TBL	Action Setup Table
ACTN_REASON_TBL	Action/Reason Combinations
BAS_EVT_CLASS	Benefits Administration Event Classification Table
CITIZEN_STS_TBL	Citizen Status Table
COVRG_CD_TBL	Coverage Code Definition Table
COVRG_RULE_TBL	Coverage Code Rule Table
ERN_PROGRAM_TBL	Earnings Program Table Description
ETHNIC_GRP_TBL	Ethnic Group Code Table
INSTALLATION	Site-Specific Install Options
MAJOR_TBL	College Instructional Program Code Table
PSXLATITEM	Translate Value Items

Data Federalization Process page

4. Log off all clients, shut down all application servers, and delete application server cache. Restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.
5. Select Set Up HCM, Install, Installation Table, and then select the HCM Options tab to access the HCM Options page..

Ensure that the Federal values and settings are set as follows:

- On the HCM Options tab, verify that the Position Management Option radio button is set to *Full*.
- In the Compensation Rate Codes group box, verify that the Multi-Step Grade check box is selected.

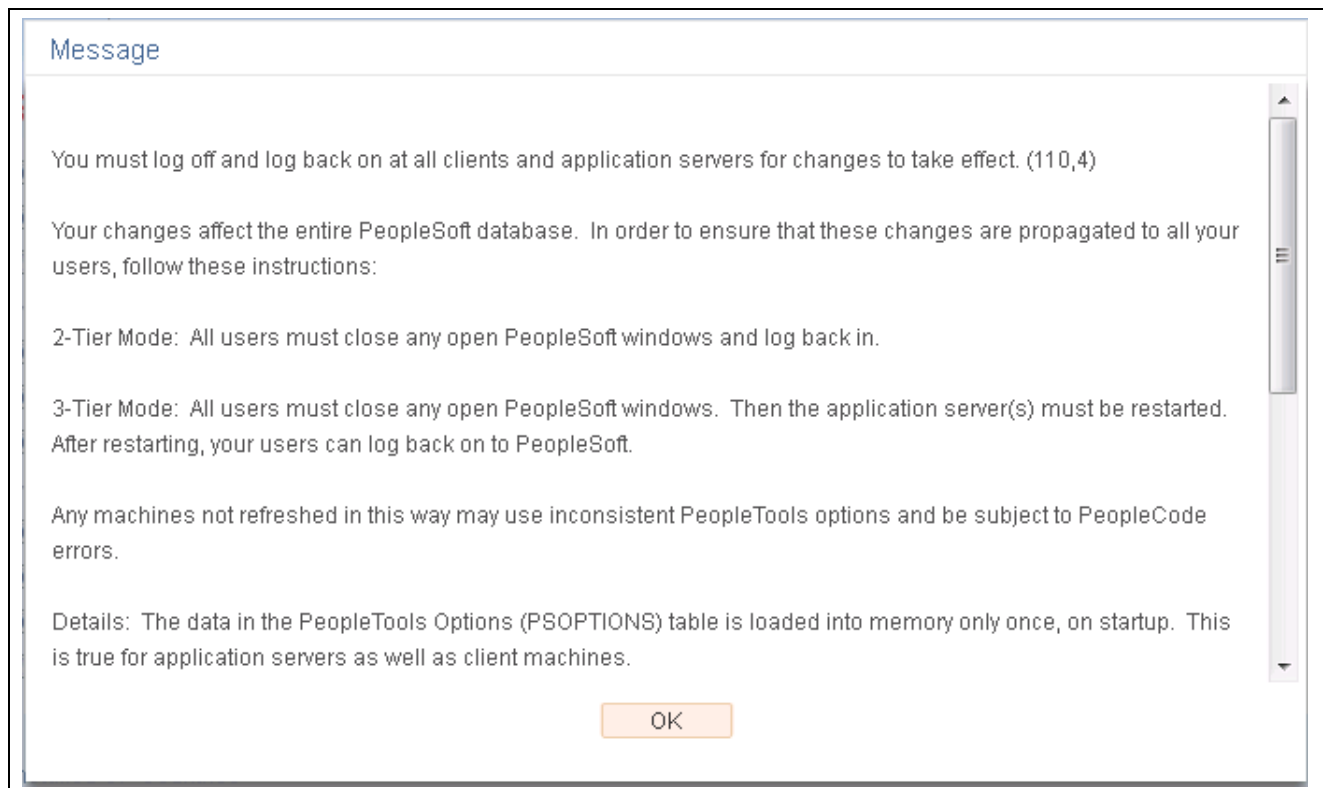
6. Select the Product Specific tab to access the Product Specific page.
7. On the Product Specific page, verify that the Default Pay Basis is set to *Per Annum*.

Task 1-2: Installing PeopleSoft HCM for Education and Government

If you use PeopleSoft Human Resources for Education and Government, verify that the Education and Government setting is enabled on the Installation Table. This enables access to specific Education and Government functionality.

To enable access to specific education and government functionality:

1. Select Set Up HCM, Install, Installation Table.
2. Verify that the Education and Government check box is selected
3. If any changes are necessary to the Installation Table, this informational message appears, “You must log off and log back on at all clients and application servers for changes to take effect”, as shown in the following example:



Informational Message

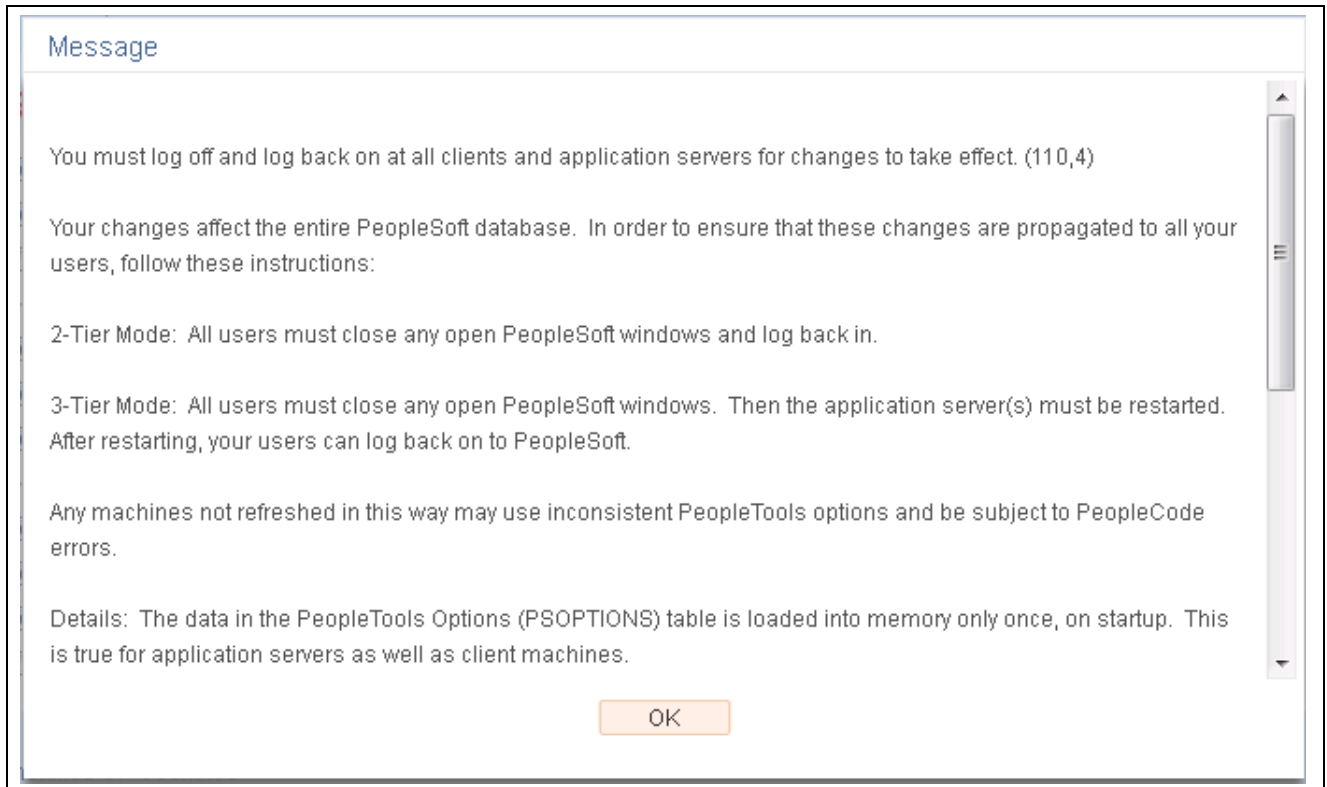
Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.

Task 1-3: Installing PeopleSoft HCM for the Military

If you use PeopleSoft Human Resources for the Military, verify that the Military option is enabled on the Installation Table to have access to specific Military Rank processing functionality.

To enable specific Military Rank processing functionality:

1. Select Set Up HCM, Install, Installation Table.
2. Verify that the Military check box is selected.
3. If any changes are necessary to the Installation Table, this informational message appears, “You must log off and log back on at all clients and application servers for changes to take effect”, as shown in the following example:



Informational Message

Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.

To ensure that the Military Specific fields show in the Search Dialogs, perform these steps:

1. In PeopleSoft Application Designer, open Record MIL_SRCH_SBR.
2. For each field in the record, do the following:
 - a. Double-click to open the Record Field Properties dialog.
 - b. Select the Alternate Search key check box.
 - c. Click OK.

The List Box Item check box is automatically selected.

3. Click Save.

Task 1-4: Installing PeopleSoft HCM for Japan

This section discusses:

- Search by Internal Employee ID
- Configuring Phone and FAX Number Fields
- Printing Japanese Characters on SQR Reports

Task 1-4-1: Search by Internal Employee ID

To enable the functionality to search by Other ID in the search views that Oracle delivers:

1. Access and open the subrecord SCRTY_FLD_SBR.
2. Double-click the OTHER_ID_JPN field.
3. Select the Alternate Search key check box.
4. Click OK.
5. Click Save.

Task 1-4-2: Configuring Phone and FAX Number Fields

Phone and fax number fields are custom format fields. If you enter a phone number without any hyphenation (for example: 9256944023), the system automatically reformats the number into the proper format (for example: 925/694-4023). This format feature works for phone numbers in the United States.

In Japan, a ten-digit phone number may be formatted in several ways. For example: 03-1234-5670, 045-123-4567, 0567-21-1234, and so on. Therefore, this format feature does not work for Japanese phone numbers.

To resolve this formatting issue for Japanese phone and FAX numbers, you can modify the definition of the phone number field to an ordinary string field. This stores the data as you entered it, without any automatic formatting. Enter the phone numbers with parentheses or dashes. For example, 03(4567)1234 or 03-4567-1234.

To configure phone and fax number fields by modifying the definition of the phone number field to an ordinary string field:

1. In PeopleSoft Application Designer, open the following fields:
 - FAX
 - HOME_PHONE
 - PHONE
 - PHONE1
 - PHONE2
 - POSITION_PHONE
 - PROXY_PHONE
 - WORK_PHONE
2. For each field in the Field Format group box, change the Format Type drop-down list from *Custom* to *Uppercase*.

3. Click Save.

Task 1-4-3: Printing Japanese Characters on SQR Reports

To print Japanese characters on SQR reports:

1. In `setenv.sqc`, uncomment the second line:

```
! Print Specific Language
!#define PRINT_JAPANESE
```

2. Depending on the settings on your operating system, additional changes to the configuration files may also be necessary.

To determine any additional changes,

See *PeopleTools: Global Technology*, "Using Global Reporting and Data Analysis Tools"

Task 1-5: Installing PeopleSoft HCM for Switzerland

This section details how to install Swiss address validation.

To import Swiss address data:

1. Using PeopleSoft Data Mover, sign on to the PeopleSoft HCM 9.2 application database.
2. Open the `CHE_ADDR.DMS` script at `<PS_APP_HOME>\scripts\CHE_ADDR.DMS`.

Note. If you are using a Unicode database, use the `CHE_ADDR_DBCS.DMS` file instead of the `CHE_ADDR.DMS` file. This imports the Swiss address data in a format that is compatible with the double-byte character set.

3. Run this script against the PeopleSoft HCM 9.2 application database.
4. Close PeopleSoft Data Mover.

Note. The accented characters in the address data are only visible on databases supporting either Unicode or the European character set.

Task 1-6: Installing PeopleSoft Time and Labor and Creating Time Zone Offsets

PeopleSoft PeopleTools stores time and date information in only one time zone—the "Base Time Zone"—that you select at the time of installation and should never change. The base time zone may be set to the time zone of the company headquarters or perhaps to Greenwich Mean Time (GMT)—also known as UTC (Coordinated Universal Time).

When employees enter the hours that they worked in PeopleSoft Time and Labor, they report time according to the local time zone and PeopleSoft PeopleTools stores the information in the base time zone. The Time Administration process then converts the base time back to the local time for rules processing.

To do this, the system must know the time zone “offsets,” or the differences between the local time and base time. The following steps detail how to select the base time zone and create time zone offsets.

To select the base time zone and create time zone offsets:

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.
2. On the PeopleSoft PeopleTools Options page, in the Base Time Zone field, browse to select the time zone in which you want all reported time to be stored.
3. Select PeopleTools, Utilities, International, Time Zones.
4. On the Time Zone Data page (and Daylight Savings page, if applicable), change the default settings.
The Time Zone Data page and Daylight Savings page display the default time zone settings that PeopleSoft PeopleTools delivers. You can change the settings on these pages to customize the information for your organization.
5. On the Time Zone Data page, create time zone offsets by clicking the Generate Query Offsets button to populate the time zone offsets table with values that represent the differences between the local and base time zones.
6. Enter the Start and End dates for the offset generation.
 - Specify Start Date: Determine 5 years prior to current date and use year begin date as Start Date.
 - Specify End Date: Determine 5 years in the future, from current date and use year end date as End Date.
7. Click OK.
8. Click Save.

Task 1-7: Installing Absence Management and Global Payroll Core

This section discusses:

- Verifying Installation Settings for PeopleSoft Absence Management
- Updating Process and Job Definitions for Packager

Task 1-7-1: Verifying Installation Settings for PeopleSoft Absence Management

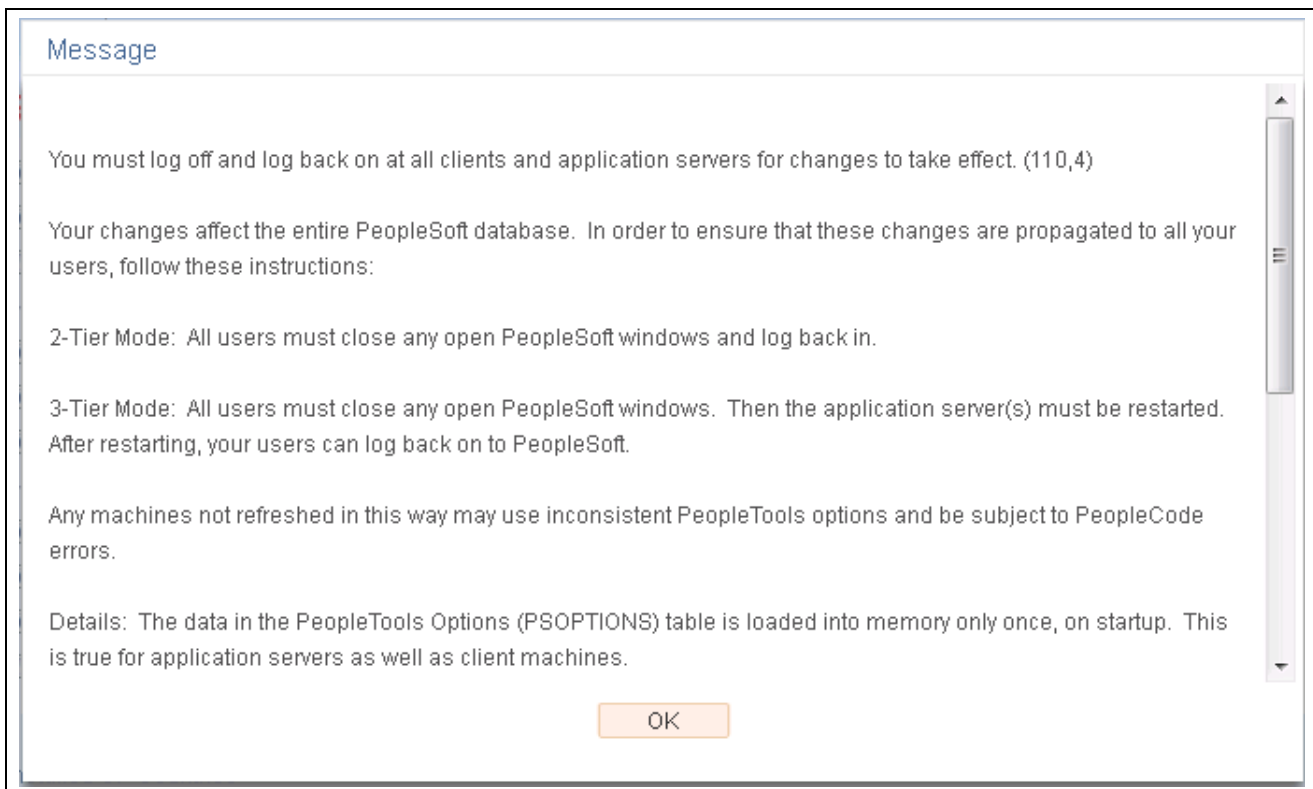
If you use PeopleSoft Absence Management, you should verify that Global Payroll Core is enabled on the Installation Table. This also applies when you are using PeopleSoft Absence Management as a stand alone product, or in combination with PeopleSoft Payroll for North America or Payroll Interface.

This step must be run against the SYS database and the DMO database.

If it was necessary to make any changes to the Installation Table, the informational message “You must log off and log back on at all clients and application servers for changes to take effect” appears, as shown in the following example:

1. Select Set Up HCM, Install, Installation Table.
2. Verify that the Global Payroll Core check box is selected.

3. If any changes are necessary to the Installation Table, this informational message appears, “You must log off and log back on at all clients and application servers for changes to take effect,” as shown in the following example:



Informational Message

Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.

Task 1-7-2: Updating Process and Job Definitions for Packager

This section discusses:

- Understanding Updates for Packager
- Updating Process Definitions for Packager
- Updating Job Definitions for Packager

Understanding Updates for Packager

If you have licensed either PeopleSoft Absence Management or PeopleSoft Global Payroll Core, you must perform this step.

The SQR GP00PK01 and the two PeopleSoft Data Mover processes (GP_EXP, GP_IMP) must be run on an NT Process Scheduler. With PeopleSoft HCM 9.2, job definitions that combine multiple Packager processes are delivered to help streamline the overall process. As a result, the job definitions that contain either the SQR Report or the PeopleSoft Data Mover processes must be scheduled to run on an NT Process Scheduler.

Updating Process Definitions for Packager

You must run these updates on both the SYS and DMO databases.

The following table lists the process definitions that you need to run on an NT Process Scheduler:

Process Type	Process Name
SQR Report	GP00PK01
Data Mover	GP_EXP
Data Mover	GP_IMP

To update the preceding Process Definitions:

1. Select the Processes component by selecting PeopleTools, Process Scheduler, Processes.
2. On the search page, click the Advanced Search link.
3. Open the component for each of the process types and process names in the preceding list.
4. Select the Process Definition Options tab.
5. In the Server Name field, select the value of the NT Process Scheduler set up at your installation.

Updating Job Definitions for Packager

You need to run the following job definitions on an NT Process Scheduler:

- GPCMPRPT — Rules Package Compare Report
- GPCMPRU — Compare & Upgrade with Report
- GPCRSCTE — Create Package & Scripts & Export
- GPEXP — Export Rule Packages
- GPICMP — Import Rule Package & Compare
- GPICMPRU — Import & Compare & Upgrade with Report
- GPICMPU — Import & Compare & Upgrade
- GPIMP — Import Rule Packages
- GPSCTE — Create Scripts & Export Package

To update the preceding Job Definitions:

1. Select the Jobs component by selecting PeopleTools, Process Scheduler, Jobs.
2. Open the component for each of the previously listed jobs.
3. Select the Job Definition Options tab.

The Server Name field contains the value *PSNT*.

4. In the Server Name field, select the value of the NT Process Scheduler that you set up at installation.

Task 1-8: Installing PeopleSoft HCM Portal Pack

This section details how to grant access to the homepage personalization.

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

To add the Portal User Role to the user IDs:

1. Using PeopleSoft Data Mover, sign in to the PeopleSoft HCM 9.2 application database.
2. Open the PeopleSoft Data Mover script `<PS_APP_HOME>\scripts\portal_add_role.dms`.
3. Run this script against the PeopleSoft HCM 9.2 application database.
4. Close PeopleSoft Data Mover.

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 1-9: Installing PeopleSoft Talent Acquisition Manager

This section details the installation steps for the PeopleSoft Resume Processing feature in PeopleSoft Talent Acquisition Manager.

PeopleSoft Resume Processing (RP) requires a working PeopleSoft HCM 9.2 database, PeopleSoft Application Server, PeopleSoft Process Scheduler, and a designated PeopleSoft Pure Internet Architecture web server. You can find detailed instructions to install these components in the appropriate PeopleSoft PeopleTools installation guide for your database platform.

See *PeopleSoft PeopleTools Installation*, for your database platform and current PeopleTools release.

See My Oracle Support

To install PeopleSoft Resume Processing functionality:

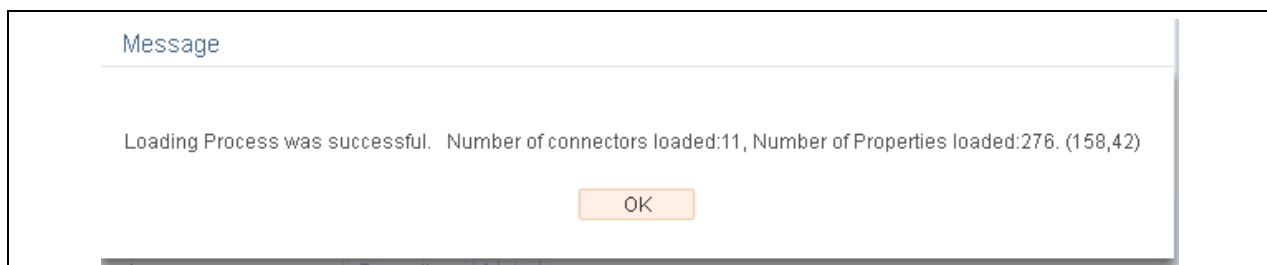
1. Configure the local Gateway as follows:
 - a. Select PeopleTools, Integration Broker, Configuration, Gateways.
 - b. Click the Search button and select the Default Local Gateway.
 - c. In the URL field, enter the following:

`http://<PIA_Webserver>:<Port Number>/PSIGW/PeopleSoftListeningConnector`

<PIA_Webserver> refers to the machine name of the web server hosting the gateway. This is usually the same machine that is used to run PeopleSoft Pure Internet Architecture (for example, `http://psftweb01.peoplesoft.com:8080/PSIGW/PeopleSoftListeningConnector`). The gateway uses the PeopleSoft listening connector to receive messages from an integration engine node or a remote gateway.

- d. Click the Load Gateway Connectors button.

An informational message appears “Loading Process was successful. Number of connectors loaded: 10; Number of Properties loaded: 257,” as shown in the following example:



IB Connectors - Loading Message

- e. Click OK.
 - f. Click Save.
2. Synchronize counters with your data.
 - a. Select Set Up HCM, Install, Product Specific, Recruiting Installation, and then select the Last Assigned IDs tab.
 - b. On the Last Assigned IDs page, click the Fix Counters button near the bottom of the page.
 - c. Click Save.

Task 1-10: Installing PeopleSoft Global Payroll Country Extensions

This section discusses:

- Understanding the PeopleSoft Global Payroll Country Extensions Installation
- Updating Installation Indicators
- Updating Stored Installation Indicators
- Copying HR Rate Codes from the HRDMO to the HRSYS Database
- Deploying Java Security Files

Understanding the PeopleSoft Global Payroll Country Extensions Installation

This section details the additional installation steps that are required to install PeopleSoft Global Payroll Country Extensions.

Note. Complete this section *only* if you are installing one or more PeopleSoft Global Payroll Country Extensions.

The following table lists the abbreviations and terms that are used in this section:

Abbreviation	PeopleSoft Global Payroll Terms
CE	Country Extension
GP	Global Payroll
HRDMO	HCM Demo database
HRSYS	HCM System database

Oracle delivers the objects, rules and data for the PeopleSoft Global Payroll Country Extensions as part of the HRSYS and HRDMO databases. The following steps walk you through additional country extension installation actions and requirements.

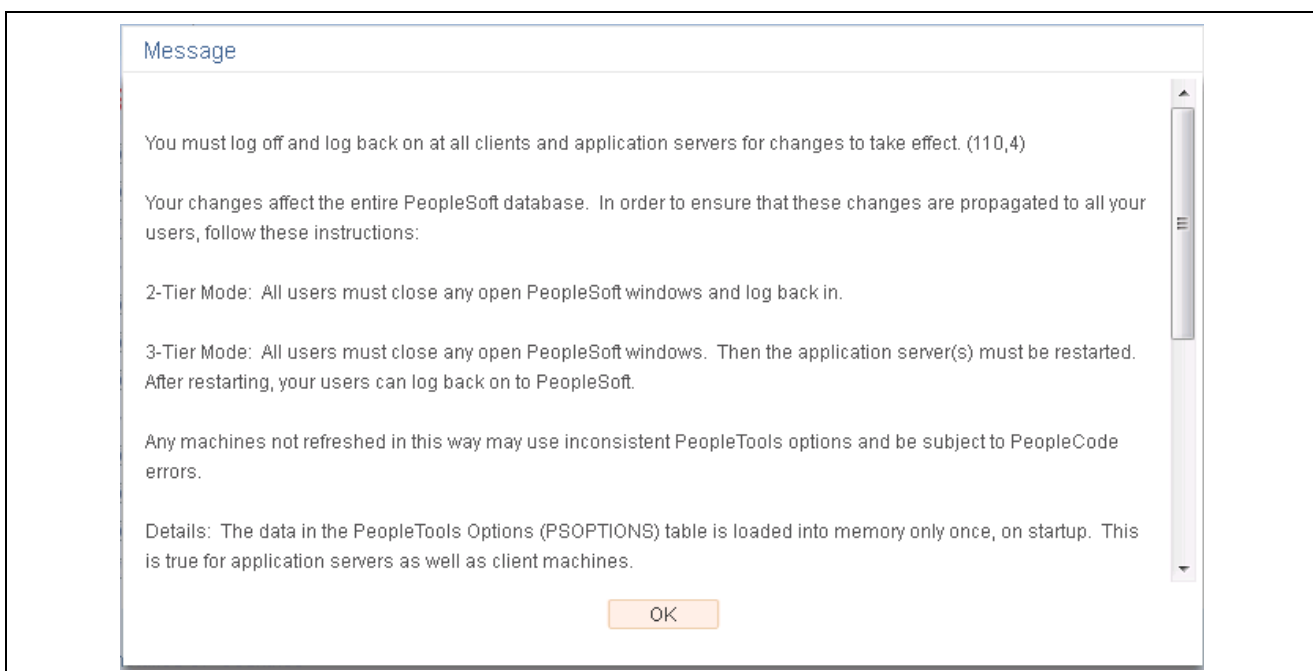
Task 1-10-1: Updating Installation Indicators

Oracle recommends that you update the PeopleSoft Global Payroll Country Extension indicators on the Installation page on both your HRSYS and HRDMO databases, so that only the Country Extensions that you have licensed are enabled.

1. Select Set Up HCM, Install, Installation Table.
2. On the Products page, select the Installed GP Countries link (at the bottom) to view a list of Countries.
3. Clear the check boxes for all of the Country Extensions that you have *not* licensed (so that the only check boxes selected are for those Country Extensions that you have licensed).

Note. This is important because these indicators are used later in this task to identify if additional updates should be made (they are conditional based according to the Country Extensions that you licensed).

4. If any changes are necessary to the Installation Table, this informational message appears “You must log off and log back on at all clients and application servers for changes to take effect,” as shown in the following example:



Informational Message

Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for this change to take effect.

Task 1-10-2: Updating Stored Installation Indicators

The gpcsys.dms script updates the store indicators for some elements and activates applicable trigger definitions, based on the Country Extensions that you have licensed.

If you use PeopleSoft Global Payroll, you should run this script as the updates are conditional based on the Installation Indicators.

Use PeopleSoft Data Mover to run the gpcsys.dms script against both the HRSYS and HRDMO databases. You can find the script in <PS_APP_HOME>\scripts.

Task 1-10-3: Copying HR Rate Codes from the HRDMO to the HRSYS Database

Oracle delivers the GP Rate Code Elements for Country Extensions in both the HRSYS and HRDMO databases. However, the HR Rate Codes that are referenced by these elements are only delivered in the HRDMO database. If you would like to copy the related HR Rate Code elements directly into your HRSYS database for the GP Country Extensions that you have licensed, you can do so by using the `gpccrate_exp.dms` and `gpccrate_imp.dms` scripts. These scripts have conditional export/import logic that is based on the Installation Indicators (as previously discussed) to only copy the referenced HR Rate Codes that are required for the GP Country Extensions that you have licensed.

After you install *both* the HRSYS and HRDMO databases, use PeopleSoft DataMover to run the `gpccrate_exp.dms` script, that you can find in your `<PS_APP_HOME>\scripts` directory, against your HRDMO database. You will then use PeopleSoft Data Mover in bootstrap mode to run the `gpccrate_imp.dms` script (that you can find in your `<PS_APP_HOME>\scripts` directory) against your HRSYS database (using the dat file that was just generated).

Note. For DB2 z/OS : Follow the instructions in the script `gpccrate_imp.dms` to alter it to work properly in your environment

Note. If you only want to copy HR Rate Codes for a subset of the PeopleSoft Country Extensions that you have licensed, you should modify the `gpccrate_exp.dms` script before running and comment out the export logic for the licensed PeopleSoft Country Extensions that you do not want to copy. By default, only those HR Rate Codes for your licensed PeopleSoft Country Extensions will be exported, based on your Installation Indicators.

Task 1-10-4: Deploying Java Security Files

This step applies to PeopleSoft GP Germany and GP Switzerland and details how to access, download and deploy the Java Security Policy Files.

To download and deploy Java Security Policy Files:

1. Access the Java website at: <http://www.oracle.com/technetwork/java/javase/downloads/index.html>
2. Download and deploy the following Java Security Policy Files:

You can find the download link under "Java Platform Technologies", Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files 7.0.

3. Follow the Instructions in the "readme.txt" file that is included in the JCE package download.

Note. You must install the new security policy into the same java installation to which you installed the peopletools PS_Home jre folder (`<PS_HOME>\jre\lib\security`).

Task 1-11: Installing PeopleSoft ePay Payslips for PeopleSoft Global Payroll

This section discusses:

- Understanding the PeopleSoft ePay Payslips Installation
- Installing the PeopleSoft ePay Payslips Functionality

- Installing Process Schedulers on z/OS Platforms
- Modifying the Sun JVM Configuration to Increase Heap Size

Understanding the PeopleSoft ePay Payslips Installation

This section details the installation steps for PeopleSoft ePay Payslips (for PeopleSoft Global Payroll).

Note. The Payslips process may throw a `java.lang.OutOfMemoryError` exception when the number of payees in a single payslip print run gets above 4,000. If this occurs, you can increase the amount of memory that you allocate to java.

See Modifying Sun JVM Configuration to Increase Heap Size.

Task 1-11-1: Installing the PeopleSoft ePay Payslips Functionality

To install PeopleSoft ePay Payslips for PeopleSoft Global Payroll:

Note. PeopleSoft ePay Payslips for PeopleSoft Global Payroll is dependent on a working FTP server. In the following example, the user ID and password used to log on to the FTP session is *PSLPUSER/PSLPUSER*.

1. Confirm the jar installation by verifying that the following two jar files are installed in your `<PS_APP_HOME>\class` directory:

Note. For a UNIX platform, the class files are in the `appserv\classes` directory.

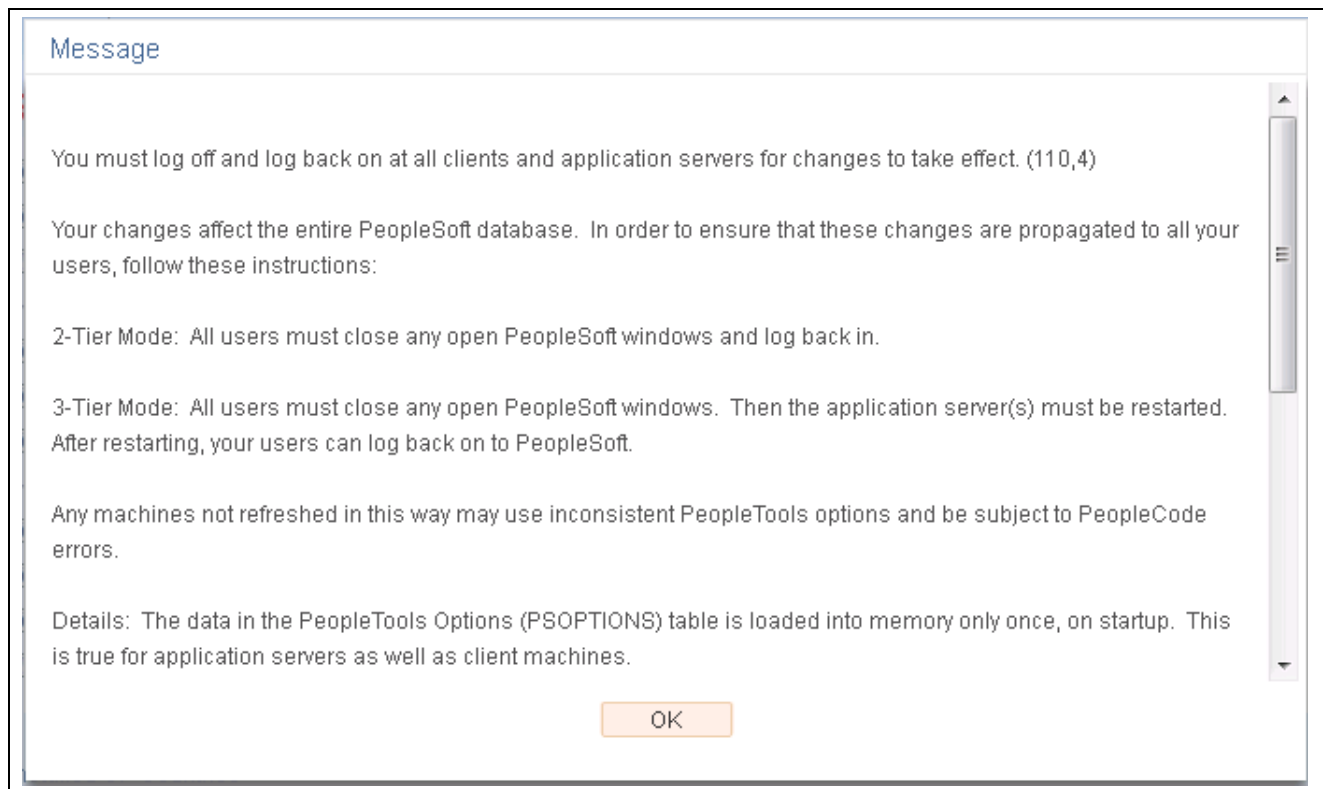
- `itext-1.4.7.jar`
 - `com.peoplesoft.hmcr.exceptions.jar`
2. Update URL IDs in the PeopleSoft system to point to the FTP site, as follows:
 The URL ID is pointing to a virtual directory on the FTP site. You can create this virtual directory “PAYSLEIPS” in the FTP root, however the PeopleSoft ePay process creates this folder if it did not previously exist. You can choose to create a directory by any name or structure (you are not limited to using “PAYSLEIPS”). If you create a different directory, you must ensure that you reference this directory in the URL ID.
 - a. Select PeopleTools, Utilities, Administration, URLs.
 - b. Select the following URL Identifier:
`GP_SS_PSLP_FTP`
 - c. Update this URL with your FTP payslip URL; for example:
`ftp://PSLPUSER:PSLPUSER@COMPUTERNAME/PAYSLEIPS/`
 3. Check the URL setting in Self Service Payslip Options, as follows:
 - a. Select Set Up HCM, Product Related, ePay, Self Service Payslip Options.
 - b. Search for the Global Payroll Country for which you are installing PeopleSoft ePay Payslips and ensure that the URL setting is the URL Identifier from the prior step.

Important! You may create your own URL ID and update this URL, instead of using GP_SS_PSLP_FTP. If you create your own URL ID you must update the Self Service Payslip Options to point to your new URL ID.

For more information regarding Payslip Options:

See *PeopleSoft HCM: ePay*, "Managing Pay Information for Global Payroll"

4. Check the PeopleSoft Installation Table Settings, as follows:
 - a. Select Set Up HCM, Install, Installation Table.
 - b. Select the ePay check box on the main Installation Table tab (Products).
 - c. If any changes are necessary to the Installation Table, this informational message appears "You must log off and log back on at all clients and application servers for changes to take effect," as shown in the following example:



Informational Message

Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your change to take effect.

Task 1-11-2: Installing Process Schedulers on z/OS Platforms

This section details additional instructions to install process schedulers on z/OS platforms.

To install process schedulers on z/OS platforms:

1. Execute this SQL statement:

```
SELECT COUNT(*) FROM PS_GP_SS_PSLP_INST
```

2. If the return value is 1 then run this SQL statement:

```
UPDATE PS_GP_SS_PSLP_INST SET GP_PSLP_XFERMETHOD = '0002'
```

3. If the return value is 0 then run this SQL statement:

```
INSERT INTO PS_GP_SS_PSLP_INST VALUES ('0002')
```

Task 1-11-3: Modifying the Sun JVM Configuration to Increase Heap Size

When you run the payslip report process, the PeopleSoft ePay Application Engine process caches the entire payslip report into memory. If Sun Java is not allocated for sufficient memory, the process abends with this error: `java.lang.OutOfMemoryError`. To increase the memory for Sun Java, edit the `psprcs.cfg` file of each process scheduler server that you intend to use for payslip report generation.

Under the [PSTOOLS] section in `psprcs.cfg`, modify the JVM configuration option to increase the memory allocated. `Xms` is the minimum and `Xmx` is the maximum memory that you would allocate for Java. If a memory error occurred in the payslip process, after you make the JVM changes, reboot the process scheduler. The abended payslip process can then be restarted.

Example of modified JVM configuration:

```
[PSTOOLS]
;=====
; General settings for PSTOOLS
;=====

;To pass java options to the jvm loaded via JNI, uncomment JavaVM Options=
;and set it equal to the list of parameters you would like to use.
;The options need to be a blank space separated list of valid java options.
;Consult your JRE vendor for valid java options.
;For example, JavaVM Options=-Xmx256m -Xms128m
JavaVM Options=-Xmx512m -Xms32m
```

Task 1-12: Installing PeopleSoft HR and PeopleSoft Global Payroll PDF Form Files

This section details how to load the PDF Form Files for use in the PeopleSoft Global Payroll Germany and Switzerland products. Complete this task if you have licensed the PeopleSoft Global Payroll Germany and Switzerland products.

Note. Before beginning this procedure, copy the files *.pdf from the PeopleSoft SQR directory to your local hard drive

To load the PDF Form Files for use with PeopleSoft Global Payroll Germany and Switzerland products:

1. Select the appropriate command for the PeopleSoft products that you installed, as follows:
 - For PeopleSoft Global Payroll Switzerland, select Set Up HCM, Product Related, Global Payroll and Absence Mgmt, Reports, Form Definition CHE.

- For PeopleSoft Global Payroll Germany, select Set Up HCM, Product Related, Global Payroll and Absence Mgmt, Reports, PDF Form Setup DEU, and then select the Correct History option.
2. Use the following table to select the Form IDs for your PeopleSoft product:

PeopleSoft Product	Form ID	Effdt	Filename
Global Payroll Switzerland	LAW-C1	01/01/2004	BETEILIGUNGEN.pdf
Global Payroll Switzerland	LAW-P1	01/01/2004	_11lohna_3-dfi_25-08-06.pdf
Global Payroll Switzerland	LAW-P1B	01/01/2004	_11lohna_3-dfi_25-08-06b.pdf
Global Payroll Switzerland	LAW-P1EDIT	01/01/2004	_11lohna_3-dfi_271208_edit.pdf
Global Payroll Switzerland	LAW-P2	01/01/2004	_11lohna_3-dfi_25-08-06_x.pdf
Global Payroll Germany	CT_ARBS	9/1/2007	ARBS092007.pdf
Global Payroll Germany	CT_ERGE	1/1/2006	ERGE012006.pdf
Global Payroll Germany	CT_KRGE	1/1/2006	KRGE012006.pdf
Global Payroll Germany	CT_MUGE	1/1/2006	MUGE112005.pdf
Global Payroll Germany	CT_WOGE	1/1/2006	WOGE112005.pdf

3. For each Form ID, click the Delete button; the Add button appears, as shown in the following example:

Form Definition CHE

Form ID: LAW-P1

Form Data Find View All First 1 of 1 Last

*Effective Date: 01/01/2004

End Date:

*Description: LAW Statement - Part 1

Comment:

Field Mapping Customize Find View All First 1 of 1 Last

	*Language Code	Default Language	Attached File	View	Delete	Details
1	German	<input checked="" type="checkbox"/>	_11lohna_3-dfi_25-08-06.pdf	View	Delete	Details

Save
 Return to Search
 Previous in List
 Next in List
 Notify
 Add
 Update/Display

Form Definition CHE page

4. Click Save.
5. Click Add.
6. Navigate to the PDF Form File, select the file and click the Upload button.

7. Click View to verify that the form is correctly loaded.

Task 1-13: Installing Directory Interface

This section discusses:

- Prerequisites
- Verifying the Installation Option for Directory Interface
- Backing up the Directory Server and Database
- Running PeopleSoft Data Mover Scripts

Prerequisites

PeopleSoft Directory Interface is dependent on an additional component LDAP-enabled directory server. If you have not already done so, install a supported LDAP-enabled directory server using the installation instructions provided by the vendor. Ensure that Oracle supports the directory server that you install.

If you already installed a LDAP-enabled directory server, verify that Oracle supports your directory server vendor and version.

Note. Novell NDS is no longer bundled with PeopleSoft applications. For the most current information on the directory servers that Oracle supports, refer to the PeopleSoft PeopleTools Hardware and Software Requirements Guide and the PeopleSoft Platforms site on the Certifications tab on My Oracle Support.

Task 1-13-1: Verifying the Installation Option for Directory Interface

If you are using PeopleSoft Directory Interface, verify that the Directory Interface setting is enabled on the Installation Table. This ensures access to Directory Interface functionality.

Select Set Up HCM, Install, Installation Table and verify that the Directory Interface check box is selected.

Task 1-13-2: Backing up the Directory Server and Database

Before you proceed with the installation, back up all servers and databases that you previously set up for the installation.

To ensure recovery to this point as necessary, do the following:

- Back up any changes that you made to the database server while setting up your PeopleSoft system.
- Back up any changes that you made to your directory server prior to this installation procedure.

Task 1-13-3: Running PeopleSoft Data Mover Scripts

In this section, you run multiple PeopleSoft Data Mover scripts (DMS) against your database.

The Directory Interface includes directory schema extensions and sample maps for publishing Human Resources data to the directory. This step details how to load the sample maps into your PeopleSoft database using PeopleSoft Data Mover.

In addition to the sample maps, you also run PeopleSoft Data Mover scripts that load messages, publish rules, and LDAP extensions into your database.

To run scripts to load sample maps, messages, publish rules and LDAP extensions into your database:

1. Launch PeopleSoft Data Mover on the Install Workstation.
2. Select File, Open.
3. Select the `\scripts` directory on the drive that contains the Directory Interface codeline installation.
For example, `<PS_APP_HOME>\scripts`.
4. Open and select File, Run Script to run the following PeopleSoft Data Mover scripts for PeopleSoft HCM:
disehr.dms
dimaphr.dms

Note. PeopleSoft Directory Interface includes directory schema extensions relevant to the PeopleSoft Human Resources application. The extensions add two Object Classes (psftPerson and psftJob) as well as several Attribute Types to your directory. You are not required to use the HR schema extensions. Nevertheless, the sample maps that Oracle provides assume that the HR schema extensions have been applied to the directory.

Task 1-14: Installing PeopleSoft PayBill Management

In this section, you activate the required service operations to integrate with the PeopleSoft FSCM 9.2 database. Oracle only supports the PeopleSoft PayBill Management product on the following database platforms:

- Oracle
- Microsoft SQL Server
- DB2 UDB for Linux, UNIX, and Microsoft Windows

Important! *For the Oracle platform only:* Run the following statement against the PeopleSoft HCM 9.2 database using SQL*PLUS before running the following script:

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

To activate the required service operations to integrate with the PeopleSoft FSCM 9.1 database:

1. Using a database query tool (such as iSQL, SQL*Plus, or DB2 Command Window), log on to the target PeopleSoft HCM database.
2. Run the following script from the `<PS_APP_HOME>/scripts` directory:

```
activate_all_hcm.sql
```

The script reads a project contained in your PeopleSoft HCM 9.2 database named `FO_MESSAGES`. Based on this, the script activates service operations, routings and handlers, starts queues and creates or activates Full Data Publish Rules.

Task 1-15: Installing Service Handlers

Some products contain service handlers that you must activate for the database to work properly.

See *PeopleTools: PeopleSoft Integration Broker*

This step is not performed by the installer but by the implementation team.

To install and activate service handlers:

1. Log on to the PeopleSoft Portal and select PeopleTools, Integration Broker, Integration Setup, Services.
2. For each of the products listed in the table that follows (that have Service Handlers that need to be activated), do the following:

Product	Contain Service Handlers That Must Be Activated
Absence Management	No
Benefits Administration	No
Candidate Gateway	No
Directory Interface	Yes
Ebenefits	No
eCompensation	Yes
eCompensationManager Desktop	Yes
eDevelopment	No
ePay	No
ePerformance	Optional
eProfile	No
Global Payroll — Argentina (listed as HR Core)	Yes
Global Payroll—Australia	No
Global Payroll—Brazil (listed as HR Core)	Yes
Global Payroll – China	No
Global Payroll—Core	Yes
Global Payroll—France	No
Global Payroll—Germany	No
Global Payroll—Hong Kong	No
Global Payroll—India	No
Global Payroll—Japan (listed as Benefits Administration)	Yes
Global Payroll—Malaysia	No
Global Payroll—Mexico (listed as HR Core)	Yes
Global Payroll—Netherlands	No
Global Payroll—New Zealand	No
Global Payroll—Singapore	No
Global Payroll—Spain	No
Global Payroll—Switzerland	Optional
Global Payroll – Thailand	No
Global Payroll—UK	No
Global Payroll—United States (HR Core)	Yes
HCM for the U.S. Federal Government	No

Product	Contain Service Handlers That Must Be Activated
HCM for Education and Government	Yes
Human Resources	Yes
Payroll for North America	Yes
Payroll Interface	No
Pension Administration	No
Stock Administration	Optional
Talent Acquisition Manager	No
Time and Labor	No
Workforce Compensation Solutions	No

- a. Get a list of the messages.
- b. Enter each message name in the Service Name field.
- c. Click Search for each.
3. On the Service details page, click the Service Operation link in the Existing Operations grid.
The Service Operation details page appears.
4. Select the Handlers tab, and verify that the Handlers Status is set to Active.

Task 1-16: Configuring Global Search Using Oracle Secure Enterprise Search

This section discusses:

- Understanding Configuring Global Search Using Oracle Secure Enterprise Search
- Defining New Roles for Global Search
- Configuring the Portal Node for PeopleSoft HCM
- Deploying and Indexing the Searches that Oracle Delivers

Understanding Configuring Global Search Using Oracle Secure Enterprise Search

PeopleSoft Search Framework is a PeopleTools owned indexed search technology that relies on the Oracle Secure Enterprise Search (SES) engine by way of PeopleSoft Integration Broker. PeopleSoft Integration Broker provides the interface between PeopleSoft Search Framework and the Oracle SES engine to deploy the search definitions, build the indexes, and return the search results.

Note. You should *only* perform these steps if you have completed the tasks discussed in the PeopleTools Installation, “Configuring Integration Between PeopleSoft PeopleTools and Oracle SES,” for your new release.

See PeopleSoft PeopleTools Installation, “Configuring Integration Between PeopleSoft PeopleTools and Oracle SES,” for your database platform.

For Oracle Secure Enterprise Search configuration for PeopleSoft:

See *PeopleTools: PeopleSoft Search Technology*

Task 1-16-1: Defining New Roles for Global Search

The following roles for Global Search and Search Pages are provided.

To enable search for a user, your PeopleSoft Security administrator should add these roles as follows:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. Add the following roles, as listed in this table:

Role	Permission List	Search
Search- Company Directory	HCCPSS3100	Person
Search- Career Plan	HCCPSS3101	Career Plan
Search- Succession Plan	HCCPSS3102	Succession Plan
Search- Compensation	HCCPSS2131	Compensation History, Total Rewards
Search- Time	HCCPSS2132	Time
Search- Absence	HCCPAMSS1S	Absence Request, Absence Balance
Search- Performance	HCCPEP2500	Performance
Search- JobPostings	HCCPRS1320	Job Postings
Search- AppIndex	HCCPRS1321	Applicant
Search-Job	HCCPHR3311	Job Data
Search-Payroll for NA	HCCPPY1001	General Deductions, Additional Pay, Garnishments

Task 1-16-2: Configuring the Portal Node for PeopleSoft HCM

To configure the Portal Node in your PeopleSoft HCM 9.2 environment:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the Portal node *HRMS*.
The Node Definitions page appears.
3. On the Node Definitions page, select the Portal tab to access the Portal page.
4. On the Portal page, in the Content URI Text field, verify that you have entered an address that corresponds to your PeopleSoft HCM environment.
For example: `http://<server>:<port>/psc/pshome/`
5. In the Portal URI Text field, verify that you have entered an address that corresponds to your PeopleSoft HCM environment.
For example: `http://<server>:<port>/psp/pshome/`
6. Click Save.
7. Click Return to Search (optional).

Task 1-16-3: Deploying and Indexing the Searches that Oracle Delivers

Oracle delivers PeopleSoft HCM search modules for which predefined Application and Search Page keyword searches are provided.

Note. Before you can deploy the search definitions, you must verify that the roles are assigned to the user.

To verify that the necessary roles are assigned to the user:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. Verify that the following roles are assigned to the user:
 - Search Query Administrator
 - Search Administrator

The following table lists the PeopleSoft HCM searches for which predefined *Global* and *SearchPage* keyword searches are provided:

Search	Search Type	Search Definition Name
1. Performance/Development Documents	Global Search	HC_EP_PERF_DEV
2. Absences Request	Global Search	HC_GP_ABS_RQST
3. Health Benefits	Both	HC_BEN_HEALTH_BENEFIT
4. Succession Planning	Global Search	HC_HR_SUCC_PLAN
5. Career Planning	Global Search	HC_HR_CAREER_PLAN
6. JOB Data*	Both	HC_HR_JOB_DATA
7. ELM*	Global Search	LS_LM_LEARNING
8. Person	Global Search	HC_HR_COMPANY_DIRECTORY1
9. Compensation History	Global Search	HC_COMP_COMPENSATION_HISTORY
10. Timesheets	Global Search	HC_TL_GBL_TIMESHEET
11. Total Rewards	Global Search	HC_COMP_TOTALREWARDS
12. Job Posting	Global Search	HC_HRS_JOB_POSTING
13. Applicant	Global Search	HC_HRS_APP_INDEX
14. Review Garnishment	Both	HC_HPY_REVW_GARN
15. Create General Deduction	Both	HC_HPY_GEN_DED
16. Create Additional Pay	Both	HC_HPY_CREATE_ADDL_PAY
17. Absence Balance	Global Search	HC_GP_ABS_SRCH_BAL

*National ID is available as advanced search field for Job Data search.

*The ELM Search definition should be imported from an ELM database using the following navigation: PeopleTools, Search Framework, Administration.

For each of the Search definitions that Oracle delivers, you need to complete the following tasks:

1. Deploy – Select PeopleTools, Search Framework, Administration, Deploy/Delete.

2. Index the Search Definitions – Run the process by selecting PeopleTools, Search Framework, Administration, Schedule Search Index.

Note. The ELM Search definition will only be available if an ELM database has been configured to use the same instance of Oracle SES. The task of deploying and indexing the ELM search definitions is optional.

Note. If the following error is encountered during indexing, update the statistics in your database, and rerun the Schedule Search Index process. This is specific to Oracle platform: *ORA-01652: unable to extend temp segment by 16 in tablespace PSTEMP*.

For more information and complete details:

See *PeopleSoft HCM: Application Fundamentals*, "Understanding and Setting Up PeopleSoft Search for HCM"

Task 1-17: Installing Configurable Matrices and Metadata

Configurable Matrices are a special type of lookup table that can be designed and populated by the Compensation Administrator. A matrix can be built to capture market pay information, calculate different pay rates based on employee data, and set increase criteria to be used in the calculation of group budgets.

Configurable Matrices are dependent on metadata definitions that in turn are dependent on the proper installation of Sun java classes. Confirm that the following two jar files are installed in the `<PS_HOME>`, or `<PS_APP_HOME>` for a decoupled environment:

Note. If you are using a decoupled environment, you can find these jar files in the `<PS_APP_HOME>\class` directory. If you are not using a decoupled environment, you can find these jar files in the `<PS_HOME>\class` directory. For UNIX installations, the class folder is `PS_APP_HOME\appserv\classes`.

Note. For UNIX installations, the class folder is `PS_APP_HOME\appserv\classes`.

- `jdom.jar`
- `com.peoplesoft.hmcr.exceptions.jar`

If there is a `<PS_APP_HOME>\class\OS390` directory, the preceding jar files should be there as well.

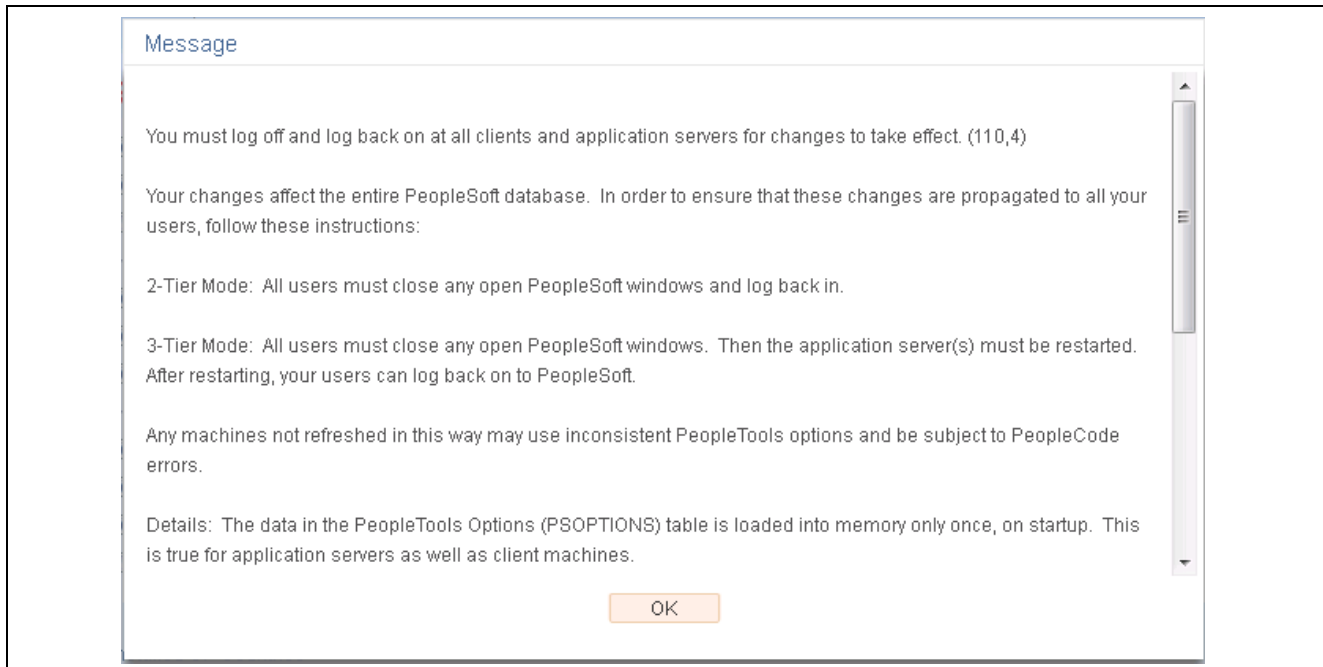
Task 1-18: Installing PeopleSoft Human Resources for French Public Sector

If you use PeopleSoft Human Resources for French Public Sector, you should verify that the French Public Sector setting is enabled on the Installation Table to ensure access to specific French Public Sector functionality.

1. Select Set Up HCM, Install, Installation Table, Products, and verify that the Human Resources and French Public Sector check-boxes are selected.

If they are not already selected, select them.

2. Go to the Country Specific page, select the Installed HR Countries link and verify that France is selected. If it is not selected, select it.
3. If it was necessary to make any changes to the Installation Table, you receive the message “You must log off and log back on at all clients and application servers for changes to take effect,” as shown in the following example:



Informational Message

4. Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.
5. Select Set Up HCM, Install, Product Specific, FPS Installation.
6. Select the FPS Installation Parameters 2 page and then click the Activate FPS Actions button, to use the existing action codes.

Task 1-19: Verifying Desktop Integration is Enabled

To confirm that the Desktop Integration feature is enabled, perform the following verification steps.

On the Server, confirm the following:

1. You can access PeopleSoft Pure Internet Architecture using a secure connection (https).
2. PeopleSoft Integration Broker is running on the application server that you are using.
3. The Role EODI_RemoteUser has been added to all PeopleSoft User Profiles who may be interacting with Desktop Integration.

On the Outlook Client, confirm the following:

1. Your Microsoft Outlook is either version 2007 or 2010.
2. You have loaded the PeopleSoft Menu add-in to your Outlook.

3. The PeopleSoft Settings and Options page in Outlook is populated correctly.

Note. If the certifications of SSL are not installed in the local browser, select Allow Untrusted Certificate in the server. This will integrate PSFT and Outlook even if the certifications of SSL are not installed in the local browser.

Note. On the server, identify the PSFT system by a unique System ID. Outlook client recognizes the PSFT system with this System ID. In Outlook client, select PeopleSoft Plug-in, Settings & Options, and verify that the online check box is selected for the System ID.

See *PeopleSoft HCM: Integration Interfaces*, "Using Desktop Integration"

See *PeopleSoft PeopleTools Installation*, for your database platform and current PeopleTools release.

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