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# PeopleSoft Financials/Supply Chain Management 9.2 In-Memory Real- Time Bottom Line Installation (through Update Image 15)

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**November 2015**

PeopleSoft Financials/Supply Chain Management 9.2 In-Memory Real-Time Bottom Line Installation (through Update Image 15)  
SKU irtbl92\_112015

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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

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This documentation is designed to direct you through your 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 at 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.

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

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## Audience

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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.
⇒ (line-continuation arrow)	A line-continuation arrow inserted at the end of a line of code indicates that the line of code has been wrapped at the page margin. The code should be viewed or entered as a continuous line of code, without the line-continuation arrow.
<b>Note.</b> Note text.	Text that begins with <i>Note</i> . indicates information that you should pay particular attention to as you work with your PeopleSoft system.



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

## Products

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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 Interaction Hub
- Oracle's PeopleSoft Staffing Front Office
- Oracle's PeopleSoft Supply Chain Management

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

## Related Information

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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 for your application and release, go to the PeopleSoft Online Help website:

[www.peoplesoftonlinehelp.com](http://www.peoplesoftonlinehelp.com)

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

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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](mailto: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.

# Installing PeopleSoft Real-Time Bottom Line

This chapter discusses:

- Understanding PeopleSoft Real-Time Bottom Line Installation
- Prerequisites
- Downloading and Installing the RTBL Schema Files
- Applying Updates for Container Databases
- Preparing to Install the RTBL Database Schema
- Installing the RTBL Database Schema After ChartField Configuration
- Installing the RTBL Database Schema Using Manual Steps
- Installing the RTBL Database Schema Using the Installer
- Installing RTBL Web, Application, and Process Scheduler Servers
- Creating a Folder for the TreeMover File Path
- Deleting Summary Trees for the System Database
- Verifying the RTBL Database Installation
- Changing the Default and Temporary Tablespaces for the RTBL Owner ID
- Updating the Databases to the Latest PeopleTools Release
- Completing Tablespace Setup
- Reviewing the Log Files
- Configuring Portal
- Completing Post-Installation Setup and Configuration

## **Understanding PeopleSoft Real-Time Bottom Line Installation**

This document is a technical guide for installers and system administrators who will implement and maintain Oracle's PeopleSoft Financials/Supply Chain Management 9.2 Real-Time Bottom Line (RTBL) product. This technical guide provides the steps necessary for installing PeopleSoft Real-Time Bottom Line 9.2.

PeopleSoft Real-Time Bottom Line 9.2 is intended to run on Oracle Exadata or Oracle SuperCluster hardware and has been certified on the Oracle platform.

## Prerequisites

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Ensure that you meet the following prerequisites before you install the PeopleSoft Financials/Supply Chain Management 9.2 In-Memory Real-Time Bottom Line schema:

- PeopleTools 8.54.11 or higher patch level.  
Both the PeopleSoft FSCM production schema and the PeopleSoft Real-Time Bottom Line schema must be at the same PeopleSoft PeopleTools release.
- PeopleSoft Financials/Supply Chain Management 9.2 application, with PeopleSoft General Ledger.  
See the PeopleTools installation guide for your PeopleTools release and database platform for information about completing database setup steps, if necessary.
- PeopleSoft Financials/Supply Chain Management Image 9.2.013 In-Memory Real-Time Bottom Line Schema Virtual CD (VCD).
- Ensure that you have applied updates to your PeopleSoft FSCM 9.2 production schema from PeopleSoft FSCM Image 9.2.015, as follows:
  - Create and apply a change package to get current on PeopleSoft General Ledger.
  - Create and apply a change package for bug 21776822 for the RTBL project.

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**Note.** After applying the two change packages listed above, DDDAUDIT may report TABLE-2, TABLE-2A, INDEX-1, or INDEX-1A exceptions for a few temporary tables or global temporary tables. You must recreate these temporary tables and global temporary tables using PeopleSoft Application Designer.

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See PeopleSoft Update Manager Home Page (My Oracle Support, Doc ID 1641843.2), select the PeopleSoft Update Image Home Pages tab, and then select the FSCM Update Image Home Page link.

## Task 1-1: Downloading and Installing the RTBL Schema Files

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Before beginning the installation, you must obtain the PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Real-Time Bottom Line Schema VCD installation software by downloading it from the Oracle Software Delivery Cloud portal. Use the documentation available on the Oracle Software Delivery Cloud portal to ensure that you obtain all of the files that are required for your environment.

To download and install the RTBL schema files:

1. Download the installation files from Oracle Software Delivery Cloud.  
See Oracle Software Delivery Cloud, <https://edelivery.oracle.com>.
2. Double-click the setup.sh file from your PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Real-Time Bottom Line Schema VCD to start the installer, Oracle's PeopleSoft InstallAnywhere.  
See the PeopleTools installation guide for Oracle for your PeopleTools release, Using the PeopleSoft Installer chapter, for instructions.

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**Note.** PeopleSoft Real-Time Bottom Line should be installed into its own *PS\_APP\_HOME* directory.

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## Task 1-2: Applying Updates for Container Databases

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You *only* need to complete this task if you are using a container database (CDB) with pluggable databases (PDBs). Otherwise, go to the next task.

If you are using a CDB, after downloading the RTBL schema files, you must create a change package for bug 21360079 to get Unit of Work 47128 from the most current PeopleSoft FSCM update image and apply it to your PeopleSoft FSCM 9.2.013 RTBL modeling *PS\_APP\_HOME* directory. This update provides files and the RTBL Installer that you will need to install the RTBL schema if you are using a CDB with a pluggable production database.

## Task 1-3: Preparing to Install the RTBL Database Schema

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This section discusses:

- Understanding the Pre-Installation Steps for RTBL
- Creating New Tablespaces
- Creating a TNS Entry for the New RTBL Schema
- Running DBSETUP
- Altering System Settings for Indexes
- Choosing a Method for Installing the RTBL Schema

### Understanding the Pre-Installation Steps for RTBL

PeopleSoft Real-Time Bottom Line (RTBL) requires a second schema within the same database instance as your production database. Through the use of synonyms and triggers, the RTBL schema will be able to access much of the production data in real time.

Before installing the RTBL schema, you need to complete the following tasks:

- Create new tablespaces.
- Create a new TNS entry for the new RTBL schema.
- Run DBSETUP to create the import script.
- Alter system settings for indexes.

### Task 1-3-1: Creating New Tablespaces

This section discusses:

- Understanding Creating New Tablespaces
- Creating New Tablespaces for RTBL
- Adding a New Temporary Tablespace for RTBL
- Adding a Default Tablespace for the RTBL Owner ID

## Understanding Creating New Tablespaces

Oracle strongly recommends that you do not share tablespaces between your production database schema and the RTBL schema. Ensure that you increase the temporary tablespace size to a minimum of 1200 MB.

PeopleSoft Data Mover provides the `set space` command to change the assigned tablespaces during import. Use this SET command to import data into a different tablespace than what is specified in the input file.

For example, you can modify your database import script by adding the following command:

```
SET SPACE old_tablespace AS new_space;
```

The new tablespaces must be created prior to running the import. After the RTBL installation has completed, you will need to add the new tablespaces to the PeopleSoft PeopleTools metadata to make them available for PeopleSoft Application Designer.

## Creating New Tablespaces for RTBL

In this step, you run a script to create new tablespaces for RTBL. If you modify the tablespace names here, you will also need to make similar modifications in your database import script and in the steps to update the PeopleTools metadata, in the task Completing Tablespace Setup, Adding New Tablespaces to the PeopleTools Metadata.

Following is an example of a script for creating the new tablespaces for tables:

```
set echo on
set timing on
spool rtt tablespaces_ts.log

REM *
CREATE BIGFILE TABLESPACE RTTABLE
DATAFILE '<PATH to datafile>' SIZE 720G AUTOEXTEND ON NEXT 4G MAXSIZE=>
  UNLIMITED
EXTENT MANAGEMENT LOCAL AUTOALLOCATE
SEGMENT SPACE MANAGEMENT AUTO
/
CREATE BIGFILE TABLESPACE RTINDEX
DATAFILE '<PATH to datafile>' SIZE 480G AUTOEXTEND ON NEXT 2G MAXSIZE=>
  UNLIMITED
EXTENT MANAGEMENT LOCAL AUTOALLOCATE
SEGMENT SPACE MANAGEMENT AUTO
/
CREATE BIGFILE TABLESPACE RTLEDGER
DATAFILE '<PATH to datafile>' SIZE 300G AUTOEXTEND ON NEXT 4G MAXSIZE=>
  UNLIMITED
EXTENT MANAGEMENT LOCAL AUTOALLOCATE
SEGMENT SPACE MANAGEMENT AUTO
/
CREATE BIGFILE TABLESPACE RTJLN
DATAFILE '<PATH to datafile>' SIZE 300G AUTOEXTEND ON NEXT 4G MAXSIZE=>
  UNLIMITED
EXTENT MANAGEMENT LOCAL AUTOALLOCATE
SEGMENT SPACE MANAGEMENT AUTO
```

/

## Adding a New Temporary Tablespace for RTBL

To create a new temporary tablespace for RTBL, edit the following syntax and run it:

```
set echo on
set timing on
spool rttemp_ts.log

REM * Create a temporary tablespace RTTEMP.
REM *
CREATE TEMPORARY TABLESPACE RTTEMP
TEMPFILE '<PATH to tempfile>' SIZE 24G AUTOEXTEND ON NEXT 4G MAXSIZE=>
UNLIMITED,
/
```

## Adding a Default Tablespace for the RTBL Owner ID

To add a default tablespace for the RTBL Owner ID, edit the following syntax and run it:

```
set echo on
set timing on
spool rtdefault_ts.log

REM * Create a tablespace RTDEFAULT for PSFT.
REM *
CREATE SMALLFILE TABLESPACE RTDEFAULT
DATAFILE '<PATH to datafile>' SIZE 24G AUTOEXTEND ON NEXT 1G MAXSIZE=>
UNLIMITED
EXTENT MANAGEMENT LOCAL AUTOALLOCATE
SEGMENT SPACE MANAGEMENT AUTO
/
```

## Task 1-3-2: Creating a TNS Entry for the New RTBL Schema

Before installing the RTBL database schema, you need to create a TNS entry for the new schema. It should be identical to the entry for your production database, with only the database name changed. Copy the TNS entry of the production database and replace the database name with a name to identify the RTBL schema. Keep the SID, or the Service Name if you are using a container database (CDB), the same for the RTBL schema as for the production schema.

In the following examples of the TNS entries for the production database and RTBL database, *Production DBNAME* is the existing production or demo database and *RTBL DBNAME* is the RTBL database to be created:

- *<Production DBNAME>* = (DESCRIPTION = (ADDRESS\_LIST = (ADDRESS = (PROTOCOL = TCP)(Host = *<SERVER>* )(Port = 1521))) ) (CONNECT\_DATA = (SERVICE\_NAME = *<Production DBNAME>*) )
- *<RTBL DBNAME>* = (DESCRIPTION = (ADDRESS\_LIST = (ADDRESS = (PROTOCOL = TCP)(Host = *<SERVER>* )(Port = 1521))) ) (CONNECT\_DATA = (SERVICE\_NAME = *<Production DBNAME>*) )

The *RTBL DBNAME* cannot be the same as the *Production DBNAME*. Update the following variables shown in the examples to reflect your environment:

- *Production DBNAME*
- *RTBL DBNAME*
- *SERVER*
- 1521 (Port)

The name that you enter for *RTBL DBNAME* in the TNS entry is the name that you will use in the next task, Running DBSETUP, to generate the import script.

### **Task 1-3-3: Running DBSETUP**

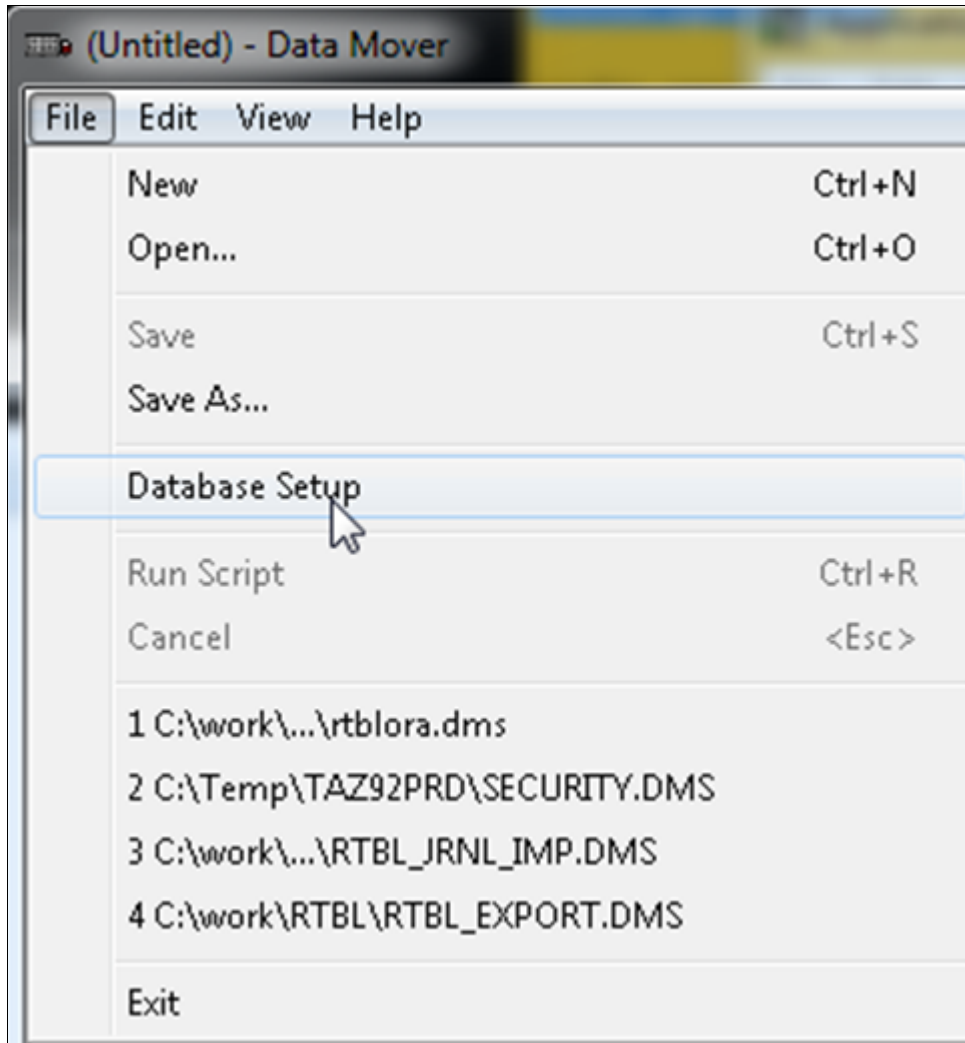
In this task, you run DBSETUP to generate the import script:

1. Launch PeopleSoft Data Mover using the NT client in bootstrap mode to connect to your existing database.  
This means that you need to connect using the database access ID, not the PeopleSoft user ID.



2. Select File, Database Setup to run DBSETUP.

For detailed instructions, see the PeopleTools installation guide for Oracle for your PeopleTools release.

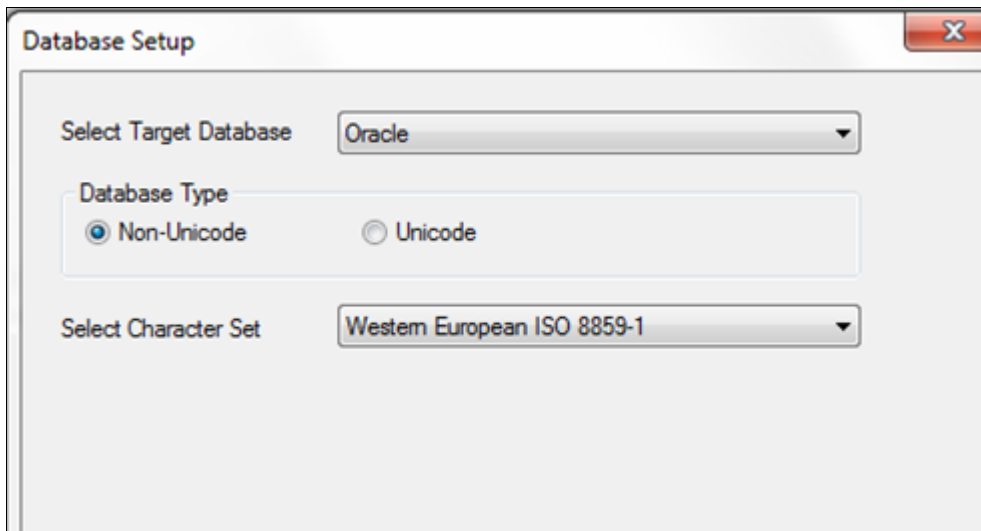


Data Mover window: File menu

3. In the Database Setup window, select values as follows:
  - a. For your target database, select *Oracle*.
  - b. Select your target database type (non-Unicode or Unicode) to match your existing production instance.

- c. Select your character set to match your existing production instance.

The following example shows the Database Setup window.

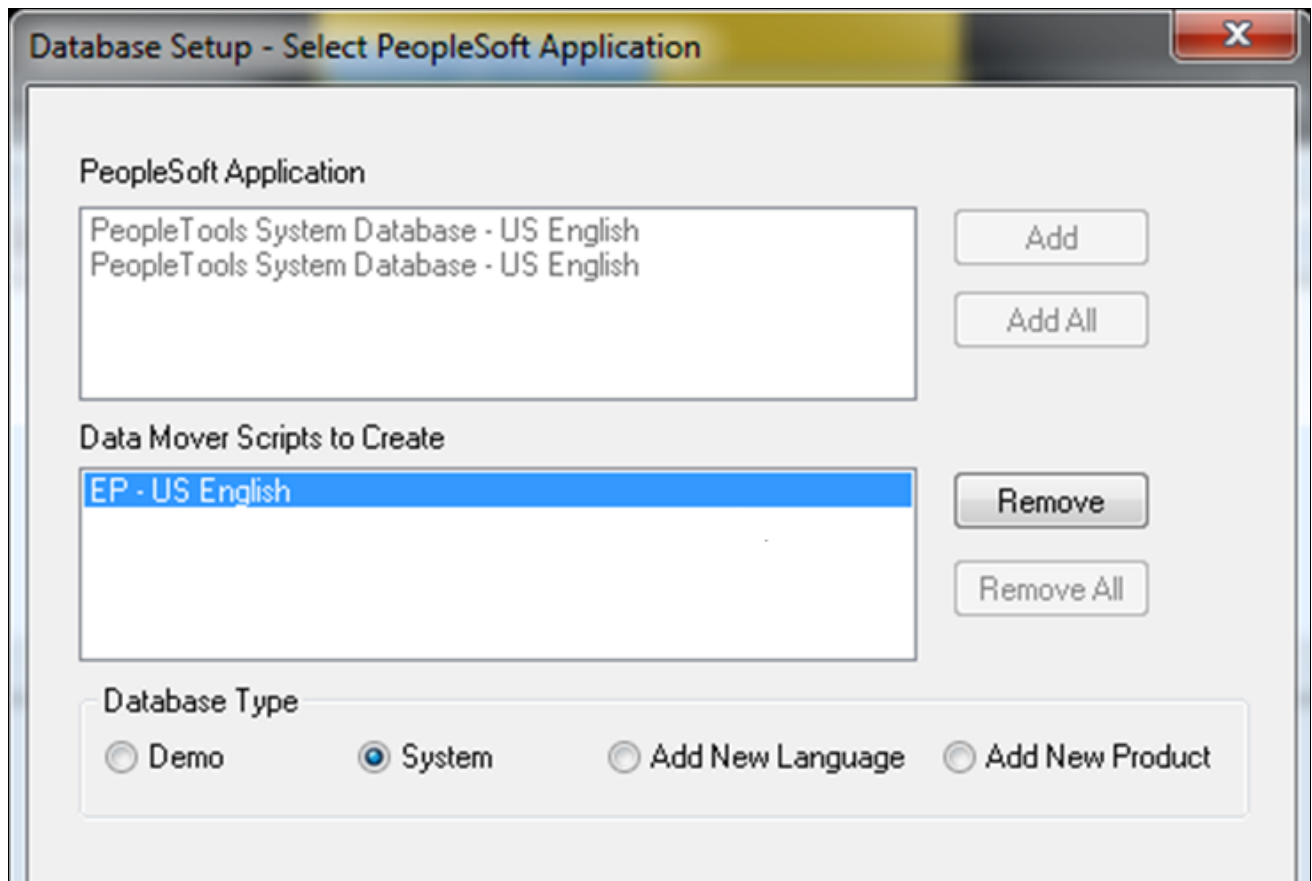


Database Setup window

4. Click Next.

The Database Setup - Select PeopleSoft Application window appears.

5. In the Data Mover Scripts to Create box, select the EP System database to be imported and click Add, as shown:



Database Setup - Select PeopleSoft Application window

6. Click Next.  
The Database Setup - Database Parameters window appears.

7. Enter the parameter values, as follows:

Database Parameters	
Database Name	TAZ92RT
Symbolic ID	SYSADM1
Access ID	RTBL
Access Password	••••
Connect ID	PEOPLE
Application Server ID	VP1
Application Server Password	•••
Web Server ID	PTWEBSERVER
Web Server Password	••••••••••
<input type="checkbox"/> Enable All Profiles	<input type="checkbox"/> Set Global Password
Global Password	

Database Setup - Database Parameters window

- Database Name: The RTBL database name that you used to create the TNS entry.
- Symbolic ID: The ID used in PeopleSoft PeopleTools behind the scenes to control access.
- Access ID: The RTBL database user (for example, SYSADM), which must be different than the database user of your production schema.
- Access Password: The password for the RTBL database user.
- Application Server ID and Application Server Password: The ID and password that will be used by your application servers when connecting to the RTBL schema.
- Web Server ID and Web Server Password: The ID and password that will be used by the web server.

For details, see the PeopleTools installation guide for Oracle for your PeopleTools release.

8. Click Finish.

DBSETUP will generate a script, `<dbname>ora.dms`, that will be used to import the db file.

9. In the DMS script that is generated, do the following:

- a. Verify the location and name of the database file to be imported.
- b. Locate and comment out the following final PeopleSoft Data Mover command to replace views:

```
REM REPLACE_VIEW *;
```

10. If you want to use our suggested tablespaces (as contained in this document), add the following statements to the database import.dms script prior to the import\* step in the DMS script, modifying the statements as needed if you have chosen different tablespace names:

---

**Note.** Complete this step only if you want to use our suggested tablespaces. Otherwise, you can skip this step if you choose to use the default tablespaces as delivered in the database image.

---

```
SET DDL INDEX * INPUT INDEXSPC AS RTINDEX;
SET DDL UNIQUE INDEX * INPUT INDEXSPC AS RTINDEX;
SET SPACE AMAPP AS RTTABLE;
SET SPACE AMARCH AS RTTABLE;
SET SPACE AMLARGE AS RTTABLE;
SET SPACE AMWORK AS RTTABLE;
SET SPACE APAPP AS RTTABLE;
SET SPACE APARCH AS RTTABLE;
SET SPACE APLARGE AS RTTABLE;
SET SPACE APWORK AS RTTABLE;
SET SPACE ARAPP AS RTTABLE;
SET SPACE ARARCH AS RTTABLE;
SET SPACE ARLARGE AS RTTABLE;
SET SPACE ARWORK AS RTTABLE;
SET SPACE AUCAPP AS RTTABLE;
SET SPACE BCAPP AS RTTABLE;
SET SPACE BDAPP AS RTTABLE;
SET SPACE BDLARGE AS RTTABLE;
SET SPACE BIAPP AS RTTABLE;
SET SPACE BILARGE AS RTTABLE;
SET SPACE BIWORK AS RTTABLE;
SET SPACE CAAPP AS RTTABLE;
SET SPACE CAWORK AS RTTABLE;
SET SPACE CPAPP AS RTTABLE;
SET SPACE CSAPP AS RTTABLE;
SET SPACE CSLARGE AS RTTABLE;
SET SPACE CSWORK AS RTTABLE;
SET SPACE CULARG3 AS RTTABLE;
SET SPACE CULARGE AS RTTABLE;
SET SPACE DIAPP AS RTTABLE;
SET SPACE DPAPP AS RTTABLE;
SET SPACE DPLARGE AS RTTABLE;
SET SPACE EOAPP AS RTTABLE;
SET SPACE EOBFAAPP AS RTTABLE;
SET SPACE EOCMAAPP AS RTTABLE;
SET SPACE EOCMWRK AS RTTABLE;
SET SPACE EOCULRG AS RTTABLE;
SET SPACE EODSAPP AS RTTABLE;
SET SPACE EOECAPP AS RTTABLE;
SET SPACE EOECULRG AS RTTABLE;
SET SPACE EOECWRK AS RTTABLE;
```

```
SET SPACE EOEIAPP AS RTTABLE;  
SET SPACE EOEPAPP AS RTTABLE;  
SET SPACE EOEPLRG AS RTTABLE;  
SET SPACE EOEPWRK AS RTTABLE;  
SET SPACE EOEWAPP AS RTTABLE;  
SET SPACE EOIUAPP AS RTTABLE;  
SET SPACE EOPPAPP AS RTTABLE;  
SET SPACE EOTPAPP AS RTTABLE;  
SET SPACE EOTPLRG AS RTTABLE;  
SET SPACE EXAPP AS RTTABLE;  
SET SPACE EXARCH AS RTTABLE;  
SET SPACE EXLARGE AS RTTABLE;  
SET SPACE EXWORK AS RTTABLE;  
SET SPACE FAAPP AS RTTABLE;  
SET SPACE FGAPP AS RTTABLE;  
SET SPACE FGLARGE AS RTTABLE;  
SET SPACE FGWORK AS RTTABLE;  
SET SPACE FIAPP AS RTTABLE;  
SET SPACE FOAPP AS RTTABLE;  
SET SPACE FOIMAGE AS RTTABLE;  
SET SPACE FOLARGE AS RTTABLE;  
SET SPACE FOWORK AS RTTABLE;  
SET SPACE FSAPP AS RTTABLE;  
SET SPACE FSAPP1 AS RTTABLE;  
SET SPACE FSLARGE AS RTTABLE;  
SET SPACE FSWORK AS RTTABLE;  
SET SPACE GLAPP AS RTTABLE;  
SET SPACE GLARCH AS RTTABLE;  
SET SPACE GLLARGE AS RTTABLE;  
SET SPACE GLWORK AS RTTABLE;  
SET SPACE GMAPP AS RTTABLE;  
SET SPACE HRAPP AS RTTABLE;  
SET SPACE HRLARGE AS RTTABLE;  
SET SPACE HTAPP AS RTTABLE;  
SET SPACE INAPP AS RTTABLE;  
SET SPACE INARCH AS RTTABLE;  
SET SPACE INLARGE AS RTTABLE;  
SET SPACE INWORK AS RTTABLE;  
SET SPACE LCAPP AS RTTABLE;  
SET SPACE LCLARGE AS RTTABLE;  
SET SPACE MGAPP AS RTTABLE;  
SET SPACE MGLARGE AS RTTABLE;  
SET SPACE MPAPP AS RTTABLE;  
SET SPACE OMAPP AS RTTABLE;  
SET SPACE OMLARGE AS RTTABLE;  
SET SPACE OMWORK AS RTTABLE;  
SET SPACE PBAPP AS RTTABLE;  
SET SPACE PBLARGE AS RTTABLE;  
SET SPACE PBWORK AS RTTABLE;  
SET SPACE PCAPP AS RTTABLE;  
SET SPACE PCARCH AS RTTABLE;  
SET SPACE PCLARGE AS RTTABLE;  
SET SPACE PGMAPP AS RTTABLE;
```

```

SET SPACE PGMLARGE AS RTTABLE;
SET SPACE PGMWORK AS RTTABLE;
SET SPACE PLAPP AS RTTABLE;
SET SPACE PLLARGE AS RTTABLE;
SET SPACE PLWORK AS RTTABLE;
SET SPACE POAPP AS RTTABLE;
SET SPACE POLARGE AS RTTABLE;
SET SPACE POWORK AS RTTABLE;
SET SPACE PSIMAGE AS RTTABLE;
SET SPACE PSIMAGE2 AS RTTABLE;
SET SPACE PTAMSG AS RTTABLE;
SET SPACE PTAPP AS RTTABLE;
SET SPACE PTAPPE AS RTTABLE;
SET SPACE PTAUDIT AS RTTABLE;
SET SPACE PTLOCK AS RTTABLE;
SET SPACE PTPRC AS RTTABLE;
SET SPACE PTPRJWK AS RTTABLE;
SET SPACE PTRPTS AS RTTABLE;
SET SPACE PTTBL AS RTTABLE;
SET SPACE PTTLRG AS RTTABLE;
SET SPACE PTTREE AS RTTABLE;
SET SPACE PTWORK AS RTTABLE;
SET SPACE PVAPP AS RTTABLE;
SET SPACE PYAPP AS RTTABLE;
SET SPACE REAPP AS RTTABLE;
SET SPACE RELARGE AS RTTABLE;
SET SPACE REWORK AS RTTABLE;
SET SPACE RSAPP AS RTTABLE;
SET SPACE RSLARGE AS RTTABLE;
SET SPACE SACAPP AS RTTABLE;
SET SPACE SPAPP AS RTTABLE;
SET SPACE SPLARGE AS RTTABLE;
SET SPACE TDAPP AS RTTABLE;
SET SPACE TDLARGE AS RTTABLE;
SET SPACE TDWORK AS RTTABLE;
SET SPACE TLAPP AS RTTABLE;
SET SPACE TLWORK AS RTTABLE;
SET SPACE TRAPP AS RTTABLE;
SET SPACE TRARCH AS RTTABLE;
SET SPACE TRIMAGE AS RTTABLE;
SET SPACE TRLARGE AS RTTABLE;
SET SPACE TRWORK AS RTTABLE;
SET SPACE WMAPP AS RTTABLE;
SET SPACE WMLARGE AS RTTABLE;
SET SPACE WMWORK AS RTTABLE;
SET SPACE WSAPP AS RTTABLE;

```

11. Create a directory on your UNIX or Linux system to be used for the installation.

This directory will be referred to as the *install dir* in the remaining steps in this document.

12. In the next screen, edit the script as follows:

- a. Change the path in all instances of SET LOG to *install dir*.

For example, change this script:

```
SET LOG c:\ptools\pt854ga\log\epengs.log;
```

To the following:

```
SET LOG <install dir>/epengs.log
```

- b. Change the input path to point to the location of the db file on your UNIX or Linux system:

For example, change this script:

```
SET INPUT c:\ptools\pt854ga\data\epengs.db;
```

To the following:

```
SET INPUT $PS_HOME/data/epengs.db
```

- c. Find REM - CREATE VIEWS and add the following REM lines, changing the path to the *install dir*:

```
REM SET LOG c:\ptools\pt854ga\log\views.log;
REM REPLACE_VIEW *;
```

13. Save the file and FTP it to the *install dir* that you created in step 11.

## Task 1-3-4: Altering System Settings for Indexes

In this task you run a command to alter system settings so the Oracle database will ignore the "descending" keyword on indexes so that they can be built properly on the global temporary tables.

To alter the system settings for indexes:

1. Connect to your database as sysdba.
2. Execute the following command:

```
alter system set "_ignore_desc_in_index"=TRUE scope=both;
```

---

**Note.** The setting `scope=both` means to set it in memory and save it in the SPFILE.

---

## Task 1-3-5: Choosing a Method for Installing the RTBL Schema

After completing the pre-installation steps, you are now ready to install the RTBL database schema. You can install the RTBL schema using either manual steps or the automated Installer, as follows:

- To use the manual steps, go to the section Installing the RTBL Database Schema Using Manual Steps and follow the instructions.

---

**Important!** If your production instance has already undergone ChartField configuration (renaming, resizing, and relabeling of ChartFields), you *must* install the RTBL schema using the manual steps and additional steps may be required. You cannot use the Installer to install the RTBL database schema. If ChartField configuration is already complete in your production instance, follow the special instructions in the next section, Installing the RTBL Database Schema After ChartField Configuration, to manually install the RTBL schema.

---

- To use the Installer, go to the section Installing the RTBL Database Schema Using the Installer and follow the instructions.



## Task 1-4: Installing the RTBL Database Schema After ChartField Configuration

---

If your production instance has already undergone ChartField configuration (renaming, resizing, and relabeling ChartFields), you must install your RTBL database schema using the manual steps and follow the installation steps in the exact order outlined in this task. The Installer cannot be used to install the RTBL database schema after ChartField configuration is complete in your production instance.

**Note.** The special installation instructions in this task *only* apply if your production instance has undergone ChartField configuration. The order of the steps in these instructions is important.

---

To install the RTBL database schema after ChartField configuration:

1. Complete steps 1 through 6 of the section Installing the RTBL Database Schema Using Manual Steps.
2. Connect to your new RTBL database using PeopleSoft Data Mover in bootstrap mode and run `replace_view.dms`.
3. Complete the following sections:

- Installing RTBL Web, Application, and Process Scheduler Servers
- Creating a Folder for the TreeMover File Path

4. Complete ChartField configuration in your RTBL schema to match the ChartField configuration in your production schema.

5. If you added any ChartFields during ChartField configuration, complete these additional steps:

- a. Create an entry for REC\_MAPPING\_TBL for the new ChartField.

Insert into PS\_REC\_MAPPING\_TBL (BASE\_RECNAME, REC\_MAPPING\_TYPE, RECNAME, and REC\_MAPPING\_ID fields) the appropriate values (<name of new ChartField table>, 'SYN', <rename for the synonym>, ").

**Note.** The rename for the synonym is a label that we will use as a pointer with which to access the production data in the same record. It must not be used as a name for existing records or views. PeopleSoft code will treat it as a rename. Do not use the prefix PS\_ for the record name for the synonym, as RTBL\_MAINT will use the prefix PS\_.

---

- b. Insert the new record into a project in PeopleSoft Application Designer.
- c. Run the RTBL\_MAINT Application Engine process against the project with 'B<ProjectName>' as the run control ID in PeopleSoft Application Designer.
- d. If the added ChartField table already has values in the production schema, then use PeopleSoft Data Mover to import the data into the RTBL schema.
6. Go back to the section Installing the RTBL Database Schema Using Manual Steps and complete steps 7 through 10.
7. Complete the section Deleting Summary Trees for the System Database and then continue with all subsequent sections.

## Task 1-5: Installing the RTBL Database Schema Using Manual Steps

---

If you want to install the RTBL database schema manually, follow the steps in this section. If you are using a container database (CDB) and your production database is pluggable (PDB), be sure to follow the CDB-specific instructions as noted in this task.

To install the RTBL schema manually:

1. Locate the scripts that you will use to run the installation, which you will find in `$PS_APP_HOME/scripts` after installation of the VCD.
2. If your production database is pluggable, go to step 8. Otherwise, continue with the next step.
3. Connect to the database (production SID) using SQL\*Plus, as system user.

For example:

```
system/<system password>@<production DB>
```

4. Run `cr8_rtbl_role.sql` to create a new RTBL role.
5. Connect to the database (production SID) using SQL\*Plus, as system user.

For example:

```
system/<system password>@<production DB>
```

6. Run `cr8_rtbl_user.sql` to create a new RTBL user.

At the following script prompts, enter the specified information:

- a. Enter name of PeopleSoft RTBL Owner ID (max. 8 characters):

For example, *rtbl*.

- b. Enter PeopleSoft RTBL Owner password (max. 8 characters):

For example, *rtbl*.

- c. Enter a desired default tablespace for this user:

For example, *RTDEFAULT*.

7. If your production database is not pluggable, go to step 14.
8. Connect to the pluggable production database using SQL\*Plus as system user.

For example:

```
sqlplus system/<system password>@<production PDB service name>
```

9. Run `cr8_role_cdb.sql` to create a new RTBL role.
10. Connect to the container database using "/" as sysdba.

For example:

```
sqlplus / as sysdba
```

11. Run `cr8_role_cdb2.sql`.
12. Connect to the pluggable production database using SQL\*Plus as system user.

For example:

```
sqlplus system/<system password>@<production PDB service name>
```

13. Run `cr8_rtbl_user.sql` to create a new RTBL user.

At the following script prompts, enter the specified information:

- a. Enter name of PeopleSoft RTBL Owner ID (max. 8 characters):

For example, *rtbl*.

- b. Enter PeopleSoft RTBL Owner password (max. 8 characters):

For example, *rtbl*.

- c. Enter a desired default tablespace for this user:

For example, *RTDEFAULT*.

14. Launch PeopleSoft Data Mover to import the database file using the database import script that you generated and modified in the task Preparing to Install the RTBL Database Schema, Running DBSETUP:

```
$PS_HOME/bin/psdmtx -CT ORACLE -CD <oracle_sid> -CO <rtbl_user> -CP <=>
rtbl_pswd> -CI people -CW people -FP <path/><dbname>ora.dms
```

15. Connect to your new RTBL schema, and update the PeopleTools metadata to assign temporary tables and regular tables to new tablespaces, using these SQL examples:

- a. Assign all regular tables to RTTABLE as follows:

```
update psrectblspc a set a.ddlspacename='RTTABLE' where exists =>
(select 'x' from psrecdefn B where B.rectype=0 AND A.RECNAME=>
B.RECNAME ) ;
```

- b. Assign RTBL\_JLN tables to RTJLN as follows:

```
update psrectblspc a set a.ddlspacename='RTJLN' where recname='RTBL_>
JLN';
```

- c. Assign RTBL\_LEDGER tables to RTLEDGER as follows:

```
update psrectblspc a set a.ddlspacename='RTLEDGER' where recname=>
'RTBL_LEDGER';
```

- d. Commit the changes.

```
commit;
```

16. Copy the following files from *\$PS\_APP\_HOME/scripts* to the *install dir* that you created in the task Running DBSETUP:

- *rtbl\_install.sh*
- *cr8\_grant.sql*
- *cr8\_gtt.sql*
- *cr8\_partitions.sql*
- *cr8\_rtbl\_role.sql*
- *cr8\_rtbl\_user.sql*
- *cr8\_sy2.sql*
- *cr8\_syn.sql*
- *cr8\_trigger.sql*
- *replace\_view.dms*
- *rtbl\_misc.sql*
- *rtbl\_sce\_partition.sql*

- cr8\_role\_cdb.sql (required only if you are using a CDB)
- cr8\_role\_cdb2.sql (required only if you are using a CDB)

17. From the *install dir*, run the shell script `rtbl_install.sh`.

The script will create a subdirectory with the same name as the RTBL DB name that you provided. Create the subdirectory on a specified location, such as *PS\_APP\_HOME*/rtblscripts, so it is not confused with the similar directory *PS\_APP\_HOME*/scripts. The log will be written into this subdirectory. It will execute several scripts to perform specific RTBL tasks.

This example of the `rtbl_install` script is written to be executed on Linux:

```
echo "Enter directory containing scripts: "
read SCRIPTSDIR
echo "Enter RTBL User:"
read RTBLID
echo "Enter RTBL user's Password:"
read RTBLPWD
echo "Enter Production DB User:"
read OWNER
echo "Enter Production user's Password:"
read PRD_OWNER_PWD
echo "Is Production DB a Pluggable DB?:"
read ISPDB
echo "Enter Production PDB service name:"
read DB
echo "Enter database SID:"
read DB
echo "Enter RTBL DB name:"
read RTBLDB
echo "Enter ORACLE_HOME:"
read ORACLE_HOME
echo "Enter Tools Release"
read TOOLS_REL
```

Enter parameter values according to the following descriptions:

- Enter directory containing scripts: This is the directory in which you put the install script and the files zipped with it. It must be writeable.
- Enter RTBL User: This is the user created earlier in this task.
- Enter Production DB User: This is the user for the regular FMS schema.
- Is Production DB a Pluggable DB?: This prompt will only appear if you chose to apply the CDB update in the earlier task Applying Updates for Container Databases. Depending on the user input for this prompt, one of the two prompts shown in bold in the example will follow. If your production database is pluggable and you enter *Y*, the next prompt will ask you to enter the Production PDB service name. If you enter *N*, the next prompt will ask you to enter the database SID.

18. Next, the following scripts will run automatically:

- `rtbl_misc.sql`
- `cr8_gtt.sql`
- `rtbl2_drop_gtt.sql` (created during installation)
- `rtbl3_build_gtt.sql` (created during installation)
- `rtbl4_indices.sql` (created during installation)

- `cr8_syn.sql`
- `rtbl5_build_syn.sql` (created during installation)
- `cr8_sy2.sql`
- `rtbl6_sy2.sql` (created during installation)
- `rtbl1_grant.sql` (created during installation)
- `cr8_trigger.sql`
- `rtbl8_triggers.sql` (created during installation)
- `rtbl_sce_partition.sql`
- `cr8_partitions.sql`
- `rtbl9_partitions.sql` (created during installation)

19. The following files will be generated and then run automatically:

- `RTBL_INSTALL.log`: Log of all the database activities.
- `OUTPUT.TXT`: Log of the installation progress.

20. Connect to your new RTBL database using PeopleSoft Data Mover and run `createtemptbl.dms` from `PS_HOME/scripts`.

21. Reconnect to your new RTBL database using PeopleSoft Data Mover in bootstrap mode and run `replace_view.dms`.

To verify that your RTBL installation was successful, continue with the tasks Installing RTBL Web, Application, and Process Scheduler Servers, Creating a Folder for the TreeMover File Path, Deleting Summary Trees for the System Database, and Verifying the RTBL Database Installation.

## Task 1-6: Installing the RTBL Database Schema Using the Installer

---

This section discusses:

- Understanding RTBL Installation Using the Installer
- Running the Installer in Console Mode

### Understanding RTBL Installation Using the Installer

Before running the Installer, you must run `DBSETUP` to prepare the database import script that will be used during the automated installation.

In this task, you will run the RTBL Installer. After installing the VCD, the RTBL Installer is located at `$PS_APP_HOME/setup/rtbl/<platform>/setup.bin`.

The installer will execute scripts in sequence to complete the following tasks:

- Create a user and schema for RTBL.
- Load the RTBL db file into the newly created schema.
- Build global temporary tables for the RTBL Application Engine processes.
- Create synonyms and triggers to allow RTBL to access production data.
- Create partitions for model Ledger and Project Resource tables.

## Task 1-6-1: Running the Installer in Console Mode

Before using the automated Installer, ensure that you have completed the task Running DBSETUP to generate the database import script. You are installing an EP system database.

To run the automated Installer in console mode:

1. Launch the Installer in console mode using the following command:

```
./setup.bin
```

The Installer will unpack itself and guide you through the steps to enter the necessary information, as shown in the following example:

```
Preparing to install...
Extracting the JRE from the installer archive...
Unpacking the JRE...
Extracting the installation resources from the installer archive...
Configuring the installer for this system's environment...

Launching installer...

=====
Peoplesoft RTBL Database Configuration (created with InstallAnywhere)
-----
```

```
Preparing CONSOLE Mode Installation...
```

2. Enter the installation folder location and press ENTER.

This should be a writeable temporary location that will hold the installation scripts and logs.

```
Choose Install Folder
-----
```

```
&Where would you like to install?
```

```
Default Install Folder:
```

```
ENTER AN ABSOLUTE PATH, OR PRESS <ENTER> TO ACCEPT THE DEFAULT:
```

```
You do not have write permissions to the chosen installation⇒
destination.
```

```
Please choose a different location for installation
```

```
ENTER AN ABSOLUTE PATH, OR PRESS <ENTER> TO ACCEPT THE DEFAULT: //ds1⇒
/home/oracle/eva/rt10
```

```
INSTALL FOLDER IS: /ds1/home/oracle/eva/rt10
IS THIS CORRECT? (Y/N): Y
```

3. Enter a value to indicate whether the production database is pluggable.

This prompt will only appear in the Installer if you chose to apply the CDB updates in the earlier task Applying Updates for Container Databases.

For example:

Is Production DB a Pluggable DB?

-----

Enter Y if the production DB is a pluggable DB. If not enter N.

Is Production DB a Pluggable DB (DEFAULT: Y): Y

=====

Is Production DB a Pluggable DB?

-----

you entered "Y" if this is correct, press 1 to continue.

If this is incorrect press 2 to return to previous step, or 3 to⇒  
cancel and  
exit.

- >1- Next
- 2- Previous
- 3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT: 1

If you entered *N* here, go to step 5. If you entered *Y*, continue with the next step.

4. Enter a connect string to connect to the pluggable production database using SQL\*Plus, as system user.

This prompt will only appear in the Installer if you chose to apply the CDB updates in the earlier task  
Applying Updates for Container Databases.

For example:

Connect String

-----

Enter requested information

Connect String (DEFAULT: user/pwd@PDBServiceName): system/system\_⇒  
password@TAZ92PRD

=====

Connect String

-----

you entered "system/system\_password@TAZ92PRD" if this is correct,⇒  
press 1 to continue.

If this is incorrect press 2 to return to previous step, or 3 to⇒  
cancel and  
exit.

- >1- Next
- 2- Previous
- 3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT: 1

After completing this step, go to step 6.

5. For a production database that is not pluggable, enter a connect string to connect to the database (production SID) using SQL\*Plus, as system user.

For example:

system/<system password>@<production DB>

Connect String

-----

Enter requested information

Connect String (DEFAULT: user/pwd@dbname): system/system\_password@  
TAZ92PRD

=====

Connect String

-----

you entered "system/system\_password@TAZ92PRD" if this is correct, press⇒  
1 to continue.

If this is incorrect press 2 to return to previous step, or 3 to cancel⇒  
and  
exit.

- >1- Next
- 2- Previous
- 3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

6. For the production database access ID, enter the owner ID for the production schema; for example, SYSADM.

Production DB Access ID

-----

Enter requested information

Production Schema Access ID (DEFAULT: SYSADM): SYSADM

=====

Production DB Access ID

-----

you entered "SYSADM"

if this is correct, press 1 to continue. If this is incorrect press 2 to  
return to previous step, or 3 to cancel and exit.



```

->1- Next
   2- Previous
   3- Cancel

```

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE DEFAULT:

7. For the production database access password, enter the owner password for the production schema.

```

Production DB Access PWD
-----

```

Enter requested information

Production DB Access PWD (DEFAULT: SYSADM):

```

=====
Production DB Access PWD
-----

```

you entered "SYSADM"

if this is correct, press 1 to continue. If this is incorrect press 2 to return to previous step, or 3 to cancel and exit.

```

->1- Next
   2- Previous
   3- Cancel

```

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE DEFAULT:

8. For the RTBL database name, enter the database name that you used when creating the TNS entry in the task Preparing to Install the RTBL Database Schema, Creating a TNS Entry for the New RTBL Schema.

```

RTBL Database Name
-----

```

Enter requested information

RTBL Database Name (DEFAULT: RTBL): RTBL

```

=====
RTBL Database Name
-----

```

you entered "RTBL"

if this is correct, press 1 to continue. If this is incorrect press 2 to return to previous step, or 3 to cancel and exit.

```

->1- Next
   2- Previous

```

3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

9. For the RTBL database access ID, enter the database user that you want to create for the new RTBL schema.

RTBL Database Access ID (database user)  
-----

Enter requested information

RTBL Database Access ID (database user) (DEFAULT: rtbl): rtbl

=====  
RTBL Database Access ID (database user)  
-----

you entered "rtbl"

if this is correct, press 1 to continue. If this is incorrect press 2 to  
return to previous step, or 3 to cancel and exit.

->1- Next  
2- Previous  
3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

10. For the RTBL database access password, enter the password for the database user.

RTBL Database Owner PWD  
-----

Enter requested information

RTBL Database Owner PWD (DEFAULT: rtbl): rtbl

=====  
RTBL DB Access PWD  
-----

you entered "rtbl"

if this is correct, press 1 to continue. If this is incorrect press 2 to  
return to previous step, or 3 to cancel and exit.

->1- Next  
2- Previous  
3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

11. Enter a value for the PeopleSoft default tablespace; for example, *RTDEFAULT* or any tablespace that you have created.

PeopleSoft Default Tablespace

-----

Enter requested information

PeopleSoft Default Tablespace (DEFAULT: PSDEFAULT): RTDEFAULT

=====

PeopleSoft Default Tablespace

-----

you entered "RTDEFAULT"

if this is correct, press 1 to continue. If this is incorrect press 2 to return to previous step, or 3 to cancel and exit.

- >1- Next
- 2- Previous
- 3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

12. Enter a value for the PeopleTools release; for example, 8.54.

Peopletools Release

-----

Enter requested information

PeopleTools Release (DEFAULT: 8.54): 8.54

=====

Peopletools Release

-----

you entered "8.54"

if this is correct, press 1 to continue. If this is incorrect press 2 to return to previous step, or 3 to cancel and exit.

- >1- Next
- 2- Previous
- 3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE

DEFAULT:

13. For the PeopleTools Home value, enter *PSHOME*, which will be used to run PeopleSoft Data Mover.

Peopletools Home  
-----

Enter requested information

Peopletools Home (DEFAULT: ): /PSHOME

=====  
Peopletools Home  
-----

you entered "PSHOME"

if this is correct, press 1 to continue. If this is incorrect press 2 to return to previous step, or 3 to cancel and exit.

->1- Next  
2- Previous  
3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

14. Enter a value for PS APP Home.

PS APP Home  
-----

Enter requested information

PS APP Home (DEFAULT: ): /APP\_HOME

=====  
PS APP Home  
-----

you entered "/APP\_HOME"

if this is correct, press 1 to continue. If this is incorrect press 2 to return to previous step, or 3 to cancel and exit.

->1- Next  
2- Previous  
3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

15. Enter a value for Oracle Home.

Oracle Home  
-----

Enter requested information

Oracle Home (DEFAULT: /usr/local/redhat/OracleProd/oracle10.2): /ORACLE\_ →  
HOME

=====

Oracle Home  
-----

you entered "/ORACLE\_HOME"

if this is correct, press 1 to continue. If this is incorrect press 2 to  
return to previous step, or 3 to cancel and exit.

->1- Next  
2- Previous  
3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

16. For the DBSETUP import script, enter the path and file name of the RTBL DBSETUP output file that will be  
used to import the database.

This file was created in the task Preparing to Install the RTBL Database Schema, Running DBSETUP.

DB Setup Import Script  
-----

Enter full path and filename of your <db name>ora.dms script.

DB Setup Import Script (DEFAULT: <path>/<dbname>ora.dms): /rtblldbora.dms

=====

DB Setup Import Script  
-----

you entered "/rtblldbora.dms"

if this is correct, press 1 to continue. If this is incorrect press 2 to  
return to previous step, or 3 to cancel and exit.

->1- Next  
2- Previous  
3- Cancel

ENTER THE NUMBER OF THE DESIRED CHOICE, OR PRESS <ENTER> TO ACCEPT THE  
DEFAULT:

17. Review the pre-installation summary information and then press ENTER to accept the installation

configuration.

Pre-Installation Summary

-----

Please Review the Following Before Continuing:

Product Name:

Peoplesoft RTBL Database Configuration

Install Folder:

/ds1/home/oracle/eva/rt10

Link Folder:

/tmp/install.dir.22881/Do\_Not\_Install

ORACLE\_HOME

/ORACLE\_HOME

RTBL Database Name

RTBL

RTBL AccessID

rtbl

RTBL Access Password

rtbl

Default Tablespace

RTDEFAULT

Production AccessID

SYSADM

Peopletools Home

/PSHOME

PS App Home

/APP\_Home

Connect string:

system/system\_password@TAZ92PRD

Disk Space Information (for Installation Target):

Required: 94,830,961 Bytes

Available: 153,298,321,408 Bytes

PRESS <ENTER> TO CONTINUE:

18. Press ENTER each time the Installer pauses to inform you of its progress after creating the user, after completing the database load, after completing the RTBL installation configuration scripts, prior to creating the views, prior to re-creating temporary tables and GTTs, and again at the end.

DB Load complete

-----

DB Load complete

PRESS <ENTER> TO CONTINUE:

```
=====
Beginning RTBL Setup
-----
```

Beginning RTBL Setup

PRESS <ENTER> TO CONTINUE:

```
=====
Creating Views
-----
```

Creating Views

PRESS <ENTER> TO CONTINUE:

```
=====
Re-creating Temporary Tables and GTTs
-----
```

Re-creating Temporary Tables and GTTs

PRESS <ENTER> TO CONTINUE:

19. When the installation is complete, press ENTER to exit the Installer.

Installation Complete

-----

Beginning RTBL setup

Congratulations. Peoplesoft RTBL Database Configuration has been⇒  
successfully installed to:  
/ds1/home/oracle/eva/rt10

PRESS <ENTER> TO EXIT THE INSTALLER:

To verify that your RTBL installation was successful, continue with the tasks Installing RTBL Web, Application, and Process Scheduler Servers, Creating a Folder for the TreeMover File Path, Deleting Summary Trees for the System Database, and Verifying the RTBL Database Installation.

## Task 1-7: Installing RTBL Web, Application, and Process Scheduler Servers

---

After installing the RTBL database schema, you must install web, application, and process scheduler servers for RTBL. Follow the same steps to set up the web, application, and process scheduler servers as for other PeopleSoft instances. For details, see the PeopleTools installation guide for Oracle for your PeopleTools release.

You also must add the JQuery libraries in the web server path. After installing the VCD, you will find the JQuery files in `$PS_APP_HOME/setup/rtbl`.

To add the JQuery libraries:

1. Shut down the web server.
2. Unzip the JQuery libraries in the following web server home path:

`web_home\applications\peoplesoft\PORTAL.war\`

You should have the following folders:

- `web_home\applications\peoplesoft\PORTAL.war\JQUERY\`
- `web_home\applications\peoplesoft\PORTAL.war\JQUERY\CSS`
- `web_home\applications\peoplesoft\PORTAL.war\JQUERY\JS`
- `web_home\applications\peoplesoft\PORTAL.war\JQUERY\CSS\Images`

3. Restart the web server.

## **Task 1-8: Creating a Folder for the TreeMover File Path**

---

Create a folder reserved for the TreeMover File Path at this point in the installation. This folder must be accessible from both the production process scheduler and the RTBL modeling process scheduler. The folder will be used on the page Real Time Bottom Line, System Configuration, Configure General Option, Configuration Options.

See the product documentation for PeopleSoft In-Memory Real-Time Bottom Line 9.2 for more information about configuring RTBL for tree deployment.

## **Task 1-9: Deleting Summary Trees for the System Database**

---

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

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

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

## **Task 1-10: Verifying the RTBL Database Installation**

---

In this task you run and review the SYSAUDIT and DDDAUDIT SQR reports to verify that your RTBL database installation is complete.

To verify the RTBL database installation:

1. After you have installed the code line into the new `PS_APP_HOME` directory, find the following files in `$PS_APP_HOME/sqr`:
  - `rt854aud.sqr`
  - `rt854ind.sqc`
  - `rt854tbl.sqc`
  - `rt854trg.sqc`



2. Rename the files as shown in this table:



Original File	Renamed File
rt854aud.sqr	dddaudit.sqr
rt854ind.sqc	dddindrt.sqc
rt854tbl.sqc	dddtblrt.sqc
rt854trg.sqc	dddtrgrt.sqc

3. Select PeopleTools, Process Scheduler, System Process Requests.  
 4. Create a new run control ID, or select an existing one.

The Process Scheduler Request page appears.

**Process Scheduler Request**

User ID: VP1      Run Control ID: EEK

Server Name:       Run Date: 11/22/2013   
 Recurrence:       Run Time: 12:46:00PM      [Reset to Current Date/Time](#)  
 Time Zone:  

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	COBOL Multi-process Job	3CBL	PSJob	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	Crystal Multi-process Job	3CRYSTAL	PSJob	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	SQR Multi-process Job	3SQR	PSJob	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	Simple AE test program	AEMINITEST	Application Engine	Web ▼	TXT ▼	Distribution
<input type="checkbox"/>	All Process Types	ALLTYPES	PSJob	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	Award Notification	AWD_MAIL	PSJob	(None) ▼	(None) ▼	Distribution
<input checked="" type="checkbox"/>	Data Designer/Database Audit	DDDAUDIT	SQR Report	Web ▼	PDF ▼	Distribution
<input type="checkbox"/>	eSettlements-PayCycle complete	EM_PAYFINISH	Application Engine	Web ▼	TXT ▼	Distribution
<input type="checkbox"/>	eSettlements-PayDate Increment	EM_PAYINCDAT	Application Engine	Web ▼	TXT ▼	Distribution
<input type="checkbox"/>	eSettlements External Payments	EM_PAY_XTRNL	Application Engine	Web ▼	TXT ▼	Distribution
<input checked="" type="checkbox"/>	Export User Tables	EXPRTUSR	Data Mover	Web ▼	TXT ▼	Distribution
<input type="checkbox"/>	FS_CF_BNKSQL	FS_CF_BNKSQL	Application Engine	Web ▼	TXT ▼	Distribution
<input type="checkbox"/>	Process Scheduler Server Clean	PRCSSRVCLN	Application Engine	Web ▼	TXT ▼	Distribution
<input type="checkbox"/>	System Audit01	SYSAUD01	SQR Report	Web ▼	PDF ▼	Distribution
<input checked="" type="checkbox"/>	System Audit	SYSAUDIT	SQR Report	Web ▼	PDF ▼	Distribution

Process Scheduler Request page

5. In the Process List table, select the check box in the rows for SQR reports for the following process names:
- DDDAUDIT
  - SYSAUDIT
6. Click Run.  
 7. Review the output.

The audits should be clean for SYSAUDIT. You can ignore the following audit exceptions for DDDAUDIT:

(INDEX-1) Index defined in the Application Designer  
and not found in the Database:

```
Record Name Index ID Ownerid
-----
```

```
RTBL_JLN _ FRTB
RTBL_LEDGER _ FRTB
RTBL_PROJ_RES _ FRTB
3 Total Rows
```

(TABLE-3) SQL Table defined in the Database and not  
found in the Application Designer:

```
SQL Table Name
-----
PS_INDEX_GTT
```

(TABLE-3) SQL Table defined in the Database and not  
found in the Application Designer:

```
SQL Table Name
-----
PS_RTBL_MAINT_LOG
1 Total Rows
```

Do not drop PS\_RTBL\_MAINT\_LOG, as the existence of this table will be used by PeopleSoft Update Manager to identify the model schema when applying SD fixes. If you are on Oracle 12c or higher, you can ignore the audits under (RTBL-8) and (RTBL-9).

## Task 1-11: Changing the Default and Temporary Tablespaces for the RTBL Owner ID

---

After you have created the temporary tablespace and default tablespace in previous steps, then run the following script to change the RTBL owner ID to use the RTDEFAULT and RTTEMP tablespaces:

```
set echo on
spool alter_psadmin.log
```

```
ACCEPT ADMIN CHAR FORMAT 'A8' -
PROMPT 'Enter name of RTBL Owner ID(max. 8 characters): '
PROMPT Enter a desired default tablespace for this user.
ACCEPT TSPACE CHAR PROMPT 'Enter desired default tablespace:'
PROMPT Enter a desired temporary tablespace for this user.
ACCEPT TEMP CHAR PROMPT 'Enter desired temporary tablespace:'
```

```
REMARK -- Alter PeopleSoft RTBL Administrator schema to use RTDEAFULT as⇒
default tablespace and RTTEMP as temporary tablespace.
```

```
alter user &ADMIN default tablespace &TSPACE
temporary tablespace &TEMP;
```

spool off

## Task 1-12: Updating the Databases to the Latest PeopleTools Release

---

After verifying the RTBL database installation, you must update both your production and modeling schemas to PeopleSoft PeopleTools 8.54.11. Follow the instructions in the delivered PeopleTools patch user documentation to apply the database changes.

## Task 1-13: Completing Tablespace Setup

---

This section discusses:

- Understanding Post-Installation Tablespace Setup
- Adding New Tablespaces to the PeopleTools Metadata
- Adding a New Tablespace for Indexes
- Rebuilding Indexes

### Understanding Post-Installation Tablespace Setup

After the installation of the RTBL database schema is complete and the application and web servers have been restarted, you will need to complete the tablespace setup for the new tablespaces that you created in the task Preparing to Install the RTBL Database Schema, Creating New Tablespaces.

### Task 1-13-1: Adding New Tablespaces to the PeopleTools Metadata

In this step, you add the new tablespaces to the PeopleSoft PeopleTools metadata. Perform this step only if you modified tablespaces during the database import.

---

**Note.** If you are adding a new tablespace just for indexes, you should follow the steps in Adding a New Tablespace for Indexes.

---

To add the new tablespaces to the PeopleSoft PeopleTools metadata:

1. Log on to your database through PeopleSoft Pure Internet Architecture and select PeopleTools, Utilities, Administration, Tablespace Utilities.
2. Add another row to the table and enter the following information:
  - Tablespace name
  - Database name
  - Type: Use *Regular*, *Large*, or *LOB* if you have CLOB or BLOB columns. For RTBL, use *Large*.
3. Click Save.

The new tablespaces should now appear in PeopleSoft Application Designer.

## Task 1-13-2: Adding a New Tablespace for Indexes

If you are adding a new tablespace just for indexes, do not add it to the list of tablespaces on the Tablespace Utilities page, as described in the step Adding New Tablespaces to the PeopleTools Metadata. Complete the following steps instead.

To add a new tablespace for indexes:

1. Have your database administrator create the RTINDEX tablespace.
2. Log on to your database through PeopleSoft Pure Internet Architecture.
3. Select PeopleTools, Utilities, Administration, DDL Model Defaults.
4. On the DDL Model Defaults page, change the DDL Model default for the Oracle platform as follows:

**DDL Model Defaults**

Platform ID: 2 Oracle Copy...

Sizing Set: 0

**DDL** Find | View All First 2 of 7 Last

Statement Type: Index + -

\*Model SQL: `CREATE [UNIQUE] **BITMAP** INDEX [IDXNAME] ON [TBNAME]  
([IXCOLLIST]) TABLESPACE **INDEXSPC** STORAGE (INITIAL **INIT**  
NEXT **NEXT** MAXEXTENTS **MAXEXT** PCTINCREASE **PCT**  
PCTFREE **PCTFREE** PARALLEL NOLOGGING`

Parameter Count: 7

DDL Parm	DDL Parameter Value		
BITMAP		<span>+</span>	<span>-</span>
INDEXSPC	RTINDEX	<span>+</span>	<span>-</span>
INIT	40000	<span>+</span>	<span>-</span>

Save Return to Search Notify Refresh

DDL Model Defaults page

- a. Click the arrow near the top right side of the page to go to page 2.
  - b. Under Parameters, in the row for the DDL Parm value *INDEXSPC*, change the default in the DDL Parameter Value column from *PSINDEX* to *RTINDEX* or to the name that you gave to your newly created index tablespace.
5. Click Save.

## Task 1-13-3: Rebuilding Indexes

Sign in to your new RTBL database in PeopleSoft Application Designer and rebuild the indexes for the following partitioned records:

- RTBL\_LEDGER
- RTBL\_JLN
- RTBL\_PROJ\_RES

## Task 1-14: Reviewing the Log Files

---

After the RTBL database schema installation has completed, review the logs output by PeopleSoft Data Mover during the database import step. These logs will be located in your *install\_dir* or your PeopleSoft Data Mover log directory, as specified in the RTBL database import script.

You should also review the logs that were generated by the install scripts *rtbl\_install.sh* and its descendants. These logs will also be located in your *install\_dir*. Detailed logs from the individual scripts are located in *install\_dir/\*.log*.

If you installed the RTBL database schema using the automated Installer, you should also review the additional logs from the Installer.

Review the following script output files in your *install\_dir*:

- *Rtbl\_install.log*
- *Rtbl\_ora.log*
- *Rtbl\_user.log*
- *Rtbl\_views.log*

Detailed logs from the individual scripts are located in *install\_dir/scripts/\*.log*.

The following summary logs are located in *install\_dir/scripts/<your db name>*:

- *Rtbl\_install.log*
- *Output.txt*

After you have reviewed the log files satisfactorily, you should delete the *install\_dir* and all of its contents as a security measure.

## Task 1-15: Configuring Portal

---

This section discusses:

- Understanding Portal Configuration
- Configuring the Production Instance
- Configuring the Modeling Instance
- Setting Folder Security for RTBL
- Verifying Single Portal Installation

## Understanding Portal Configuration

You will need to perform Portal configuration steps for the production instance and for the RTBL modeling instance.

In this task you will set up the following nodes:

- Default local node (for each instance)
- Portal host node, PSFT\_RTBL (for each instance)
- Remote node (for each instance, using the same named node as the default local node for the other instance)
- ERP node (modeling instance only)
- Trusted nodes for single signon (for each instance)

### Task 1-15-1: Configuring the Production Instance

To configure the production instance:

1. Select PeopleTools, Portal, Node Definitions.

- On the Node Definitions tab, set up the default local node.

Normally PSFT\_EP is the node name used for the default local node, as shown:

The screenshot shows the Oracle PeopleTools interface for the Node Definitions tab. The breadcrumb trail at the top is: Favorites > Main Menu > PeopleTools > Portal > Node Definitions. The Oracle logo is visible in the header. Below the breadcrumb trail, there are tabs for Node Definitions, Connectors, Portal, WS Security, and Routings. The Node Definitions tab is active. The form contains the following fields and options:

- Node Name:** PSFT\_EP
- \*Description:** Financials/Supply Chain
- \*Node Type:** PIA (dropdown menu)
- \*Authentication Option:** Password (dropdown menu)
- Node Password:** Masked with dots
- \*Default User ID:** VP1
- Hub Node:** Empty field
- Master Node:** Empty field
- Company ID:** Empty field
- IB Throttle Threshold:** Empty field
- Image Name:** Empty field
- Codeset Group Name:** Empty field

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

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

Buttons on the right include Copy Node, Rename Node, and Delete Node. At the bottom of the form, there are buttons for Save, Return to Search, and links for Contact/Notes and Properties. The footer of the form shows the breadcrumb trail: Node Definitions | Connectors | Portal | WS Security | Routings.

Node Definitions tab

- Set the authentication option.

Note that the same authentication option should be used when setting up the same named node in the modeling database later in the task Configuring the Modeling Instance.

4. On the Portal tab, check that the Content URI Text and Portal URI Text values have the correct URL for the production instance and are formatted to follow the examples shown above the URI text boxes.

Node Definitions | Connectors | **Portal** | WS Security | Routings

Node Name PSFT\_EP

**Details**

Description Financials/Supply Chain ☐ Local Node

Tools Release

Application Release

Content URI Text Example: http://someserver/psc/pshome/

Portal URI Text Example: http://someserver/psp/pshome/

☐ Portal Host Node

Network Node Name

Node Definitions | Connectors | Portal | WS Security | Routings

Portal tab

5. On the Node Definitions tab, set up the portal host node PSFT\_RTBL, as follows:
  - a. If this node does not exist, create it by copying from an existing node and then making changes.
  - b. Deselect the Local Node check box to set the PSFT\_RTBL node as a remote node.



c. Set the authentication option to *None*, as shown in the following example:

Node Definitions

Connectors

Portal

WS Security

Routings

Node Name

PSFT\_RTBL

Copy Node

\*Description

Portal Real Time Bottom Line

Rename Node

\*Node Type

PIA

☐ Default Local Node

☐ Local Node

☒ Active Node

☐ Non-Repudiation

☐ Segment Aware

\*Authentication Option

None

\*Default User ID

VP1

Hub Node

Master Node

Company ID

IB Throttle Threshold

Image Name

Codeset Group Name

Contact/Notes

Properties

Save

Return to Search

Node Definitions

Connectors

Portal

WS Security

Routings

Node Definitions tab

6. On the Portal tab, set the Content URI Text and Portal URI Text values to use the domain for the modeling instance, as follows:

The screenshot shows the 'Portal' tab configuration for a node named 'PSFT\_RTBL'. The 'Details' section is active. The 'Description' is 'Portal Real Time Bottom Line'. The 'Tools Release' is '8.54' and the 'Application Release' is 'Financials/SCM 9.20'. The 'Content URI Text' and 'Portal URI Text' fields are both set to 'http://server.us.example.com:8020/psc/ps/'. The 'Portal Host Node' checkbox is checked. The 'Network Node Name' field is empty. A 'Save' button is located at the bottom left, and a 'Return to Search' link is at the bottom left. The breadcrumb navigation at the bottom shows 'Node Definitions | Connectors | Portal | WS Security | Routings'.

#### Portal tab

- a. Set the Content URI Text field to `http://modelingserver/psc/pshome`.
  - b. Set the Portal URI Text field to `http://modelingserver/psp/pshome`.
  - c. Make sure that the Portal Host Node check box is selected.
7. On the Node Definitions tab, set up the remote node as follows:
- a. If the remote node does not exist, you can create it by copying from the PSFT\_RTBL node and then making changes.
  - b. Use the same name as the default local node for the modeling instance.
- Note that the default local nodes for the modeling instance and the production instance may be named the same, PSFT\_EP. In order to avoid conflict, the default local node in the modeling instance needs to be renamed in the next task, Configuring the Modeling Instance, step 3. You can assign a new node name in this step prior to doing the rename.

- c. Set the authentication option.

Note that the same authentication option should be used when setting up the same named node in the modeling database later in the task Configuring the Modeling Instance.

In the following example, the default local node in the modeling database is EP920MST, and the same node name is created here in the production database but set up as a remote node:

Node DefinitionsConnectorsPortalWS SecurityRoutings

Node Name

EP920MST

\*Description

Financials/Supply Chain Remote

\*Node Type

PIA

☐ Default Local Node

☐ Local Node

☒ Active Node

☐ Non-Repudiation

☐ Segment Aware

\*Authentication Option

Password

Node Password

.....

\*Default User ID

VP1

Hub Node

Master Node

Company ID

IB Throttle Threshold

Image Name

Codeset Group Name

Copy Node

Rename Node

Delete Node

Contact/Notes

Properties

Save

Return to Search

Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions tab

8. On the Portal tab, set the Content URI Text and Portal URI Text values to use the same domain as defined for the modeling instance in the PSFT\_RTBL node.

If you copied the node from PSFT\_RTBL, the URI text values should already reflect the correct values. Following is an example of the Portal tab:

The screenshot shows the 'Portal' tab of a configuration interface for node 'EP920MST'. At the top, there are five tabs: 'Node Definitions', 'Connectors', 'Portal' (selected), 'WS Security', and 'Routings'. Below the tabs, the 'Node Name' is 'EP920MST'. A 'Details' section is highlighted. The 'Description' is 'Financials/Supply Chain Remote' and there is a 'Local Node' checkbox which is unchecked. The 'Tools Release' is '3.5.4' and the 'Application Release' is 'Financials/SCM 9.20.'. The 'Content URI Text' field has an example 'http://someserver/psc/pshome/' and the value 'http:// server.us.example.com:8222/psc/RTBL/'. The 'Portal URI Text' field has an example 'http://someserver/psp/pshome/' and the value 'http:// server.us.example.com:8222/psp/RTBL/'. At the bottom, there are 'Save' and 'Return to Search' buttons, and a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Name EP920MST	
<b>Details</b>	
Description	Financials/Supply Chain Remote <input type="checkbox"/> Local Node
Tools Release	3.5.4
Application Release	Financials/SCM 9.20.
Content URI Text	Example: http://someserver/psc/pshome/ http:// server.us.example.com:8222/psc/RTBL/
Portal URI Text	Example: http://someserver/psp/pshome/ http:// server.us.example.com:8222/psp/RTBL/
<input type="button" value="Save"/>	
<input type="button" value="Return to Search"/>	
Node Definitions   Connectors   Portal   WS Security   Routings	

Portal tab

9. Select PeopleTools, Security, Security Objects, Single Signon.

The Single Signon page appears.

### Single Signon

Authentication Token expiration time

Expiration Time in minutes:  Valid values are 1 - 10,000

Trust Authentication Tokens issued by these Nodes

Message Node Name	Description	Local Node		
PSFT_EP	Financials/Supply Chain	1	+	-
EP920MST	Portal Real Time Bottom Line		+	-

Single Signon page

10. Set up trusted nodes for Single Signon by adding the remote node setup used in steps 7 and 8, which is the default local node in the modeling instance.

11. Select PeopleTools, Portal, Structure and Content, and then click the link for the Real Time Bottom Line folder.

The Structure and Content page appears.

[Root](#) > [Real Time Bottom Line](#)

## Structure and Content

\* Click the folder label to view the child folders and content references for that folder  
 \* Click the "Edit" link to edit the folder definition

▼ Folders				Personalize	Find	View All	First	1-6 of 6	Last
Label	Edit	Sequence number							
<a href="#">System Configuration</a>	<a href="#">Edit</a>	1000	<a href="#">-</a>						
<a href="#">Model Business Object</a>	<a href="#">Edit</a>	2000	<a href="#">-</a>						
<a href="#">Deploy Business Object</a>	<a href="#">Edit</a>	3000	<a href="#">-</a>						
<a href="#">Supplementary Configurations</a>	<a href="#">Edit</a>	4000	<a href="#">-</a>						
<a href="#">Hidden Pages</a>	<a href="#">Edit</a>	5000	<a href="#">-</a>						
<a href="#">RTBL Reports</a>	<a href="#">Edit</a>	7000	<a href="#">-</a>						

[Add Folder](#)

\* Click the "Edit" link to edit the content reference definition

▼ Content References							Personalize	Find	View All	First	1-4 of 4	Last
Link	Node Name	Label	Edit	Sequence number	Create Link	Number of links						
<input type="checkbox"/>	PSFT_RTBL	RTBL Dashboard	<a href="#">Edit</a>	10	<a href="#">Create Link</a>	0						<a href="#">-</a>
<input type="checkbox"/>	PSFT_RTBL	Ledger Scenario Inquiry Drill	<a href="#">Edit</a>	20	<a href="#">Create Link</a>	0						<a href="#">-</a>
<input type="checkbox"/>	PSFT_RTBL	Scenario Dashboard	<a href="#">Edit</a>	120	<a href="#">Create Link</a>	0						<a href="#">-</a>
<input type="checkbox"/>	PSFT_RTBL	Analyze Scenario and Deploy	<a href="#">Edit</a>	125	<a href="#">Create Link</a>	0						<a href="#">-</a>

[Add Content Reference](#) [Add Content Reference Link](#)

[Save](#) [Notify](#)

Structure and Content page

12. On the Structure and Content page, add the content reference attribute name *Location* with the attribute value *Remote* to the RTBL Dashboard and Scenario Activity Guide content references, as follows:
- To access the RTBL Dashboard content reference, click the Edit link in the row for the RTBL Dashboard.

- b. In the Content Reference Attributes section, enter *Location* in the Name field and *Remote* in the Attribute value field.

This example shows the Content Reference Attributes section of the Content Ref Administration page for the RTBL Dashboard:

The screenshot displays the Oracle Content Ref Administration page for the RTBL Dashboard. The page is divided into several sections:

- General Information:**
  - Name: RTBLDASHBOARD\_LINK
  - Label: RTBL Dashboard
  - Long Description: (254 Characters)
  - Product: CO
  - Sequence number: 10
  - Owner ID: FRTB (IM Real-Time Bottom Line)
  - Usage Type: Target
  - Storage Type: Remote by URL
  - Template Name: PTAL\_APP\_LANDING\_PAGE\_T
  - WorkCenter Page
- URL Information:**
  - Node Name: PSFT\_RTBL
  - URL Type: PeopleSoft Generic URL
  - \*Portal URL: s/WEBLIB\_PTAL.ISCRIPT1.FieldFormula.IScript\_PTAL\_DASHBOARD?tab=RTBLDASHBOARD
- Content Reference Attributes:** (Highlighted with a red oval)
  - Name: LOCATION
  - Label: (empty)
  - Attribute value: REMOTE
  - Translate checkbox: (unchecked)

Content Ref Administration page: Content Reference Attributes section

- c. Click Save.

**Note.** Make sure the Translate check box is deselected prior to saving the content reference, or you will not be able to save the changes.

- d. To access the Scenario Activity Guide content reference, click the Hidden Pages link, and then click the Edit link in the row for the Scenario Activity Guide and repeat steps 12b and 12c.

## Task 1-15-2: Configuring the Modeling Instance

To configure the modeling instance:

1. Select PeopleTools, Portal, Node Definitions.
2. On the Node Definitions tab, set up the default local node, as shown in the following example:

The screenshot displays the 'Node Definitions' tab in the PeopleTools interface. The configuration for a node named 'EP920MST' is shown. The 'Description' is 'Financials/Supply Chain' and the 'Node Type' is 'PIA'. The 'Authentication Option' is set to 'Password'. The 'Node Password' is masked with dots. The 'Default User ID' is 'VP1'. The 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', and 'Codeset Group Name' fields are empty. The 'Default Local Node', 'Local Node', and 'Active Node' checkboxes are checked, while 'Non-Repudiation' and 'Segment Aware' are unchecked. The 'Copy Node' and 'Rename Node' buttons are visible. The 'Save' button is at the bottom left. The 'Return to Search' button is at the bottom left. The 'Contact/Notes' and 'Properties' tabs are at the bottom right. The breadcrumb navigation at the bottom shows 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions tab

3. If the default local nodes for the modeling instance and the production instance are named the same, PSFT\_EP, rename the default local node for the modeling instance to the new name assigned in the previous task, Configuring the Production Instance, step 7b.

During the rename, if you see the error Node PSFT\_EP cannot be renamed. Node referenced in runtime tables. (158,2760), perform the following steps to clear live message data referencing the node:

- a. To deactivate all the domains in your messaging system, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
- b. Select the All Domains Inactive check box.



- c. Click Update.
- d. Click Force Reset.

The following example shows the Domain Status page:

**Domain Status**

**Domain Criteria**

Grace Period for all Domains (Minutes)

☐ All Domains Active ☒ All Domains Inactive

[Set Up Failover](#)  
[Master/Slave Load Balance](#)  
[Slave Templates](#)

**Domains** [Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Failover Group	Failover Priority	Machine Name	Application Server Path	Domain Status	Grace Period	Slave Indicator
		server1	/ds1/home/upgtest2/psft/pt/8.54/appserv/RTBL	Inactive		<a href="#">View Domain Queue Sets</a>

**Dispatcher Status** [Personalize](#) | [Find](#) | [First](#) | [1-3 of 3](#) | [Last](#)

Machine Name	Dispatcher Name	Application Server Path	Status String	Date/Time Stamp
server1	PSBRKDSP_dflt	/ds1/home/upgtest2/psft/pt/8.54/appserv/RTBL	INACT	
server1	PSPUBDSP_dflt	/ds1/home/upgtest2/psft/pt/8.54/appserv/RTBL	INACT	
server1	PSSUBDSP_dflt	/ds1/home/upgtest2/psft/pt/8.54/appserv/RTBL	INACT	

#### Domain Status page

- e. Using PeopleSoft Data Mover, run the AppMsgPurgeLive.dms and AppMsgPurgeAll.dms scripts. These scripts are located in *PS\_HOME/scripts*.
  - f. Log on through PeopleSoft Pure Internet Architecture, select PeopleTools, Portal, Node Definitions, and rename the default local node for the modeling instance to the new name assigned in the previous task, Configuring the Production Instance, step 7b.
  - g. Reboot the web server and delete the app server cache.
  - h. To reactivate the message domains, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
  - i. Select the All Domains Active check box.
  - j. Click Update.
4. Select PeopleTools, Portal, Node Definitions, and set the authentication option on the Node Definitions tab. Set the same authentication option as you specified for the same node name in the production instance.

5. On the Portal tab, check that the Content URI Text and Portal URI Text values have the correct URL for the modeling instance.

The following example shows the Portal tab:

The screenshot shows the 'Portal' tab selected in a configuration window. The 'Node Name' is 'EP920MST'. The 'Details' section is expanded, showing the 'Description' as 'Financials/Supply Chain' and the 'Local Node' checkbox checked. The 'Default Portal' is set to 'EMPLOYEE'. The 'Tools Release' is '8.54' and the 'Application Release' is 'Financials/SCM 9.20.'. The 'Content URI Text' and 'Portal URI Text' fields both contain the URL 'http://server.us.example.com:8222/psc/RTBL/'. Above each text field is an example URL: 'Example: http://someserver/psc/psphome/'. At the bottom, there are 'Save' and 'Return to Search' buttons, and a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Portal tab

6. On the Node Definitions tab, set up the portal host node PSFT\_RTBL, as follows:
  - a. If the node has not been created yet, you can copy from the default local node and make the changes.
  - b. Select the Local Node check box to set the PSFT\_RTBL node as a local node.

c. Set the authentication option to *None*, as shown in the following example:

Node DefinitionsConnectorsPortalWS SecurityRoutings

Node NamePSFT\_RTBL

\*DescriptionPortal Real Time Bottom Line

\*Node TypePIA

\*Authentication OptionNone

\*Default User IDVP1

Hub Node

Master Node

Company ID

IB Throttle Threshold

Image Name

Codeset Group Name

Copy Node

Rename Node

☐ Default Local Node

☒ Local Node

☒ Active Node

☐ Non-Repudiation

☐ Segment Aware

Contact/Notes

Properties

Save

Return to Search

Node Definitions tab

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7. On the Portal tab, set the Content URI Text and Portal URI Text values to use the domain for the modeling instance, as follows:

The screenshot shows the 'Portal' tab configuration for a node named 'PSFT\_RTBL'. The 'Details' section is active. The 'Description' is 'Portal Real Time Bottom Line' and the 'Local Node' checkbox is checked. The 'Default Portal' is set to a dropdown menu. The 'Tools Release' is '8.54' and the 'Application Release' is 'Financials/SCM 9.20.'. The 'Content URI Text' field contains 'http:// server.us.example.com :8020/psc/ps/' with an example above it: 'http://someserver/psc/pshome/'. The 'Portal URI Text' field contains 'http:// server.us.example.com :8020/psp/ps/' with an example above it: 'http://someserver/psp/pshome/'. The 'Portal Host Node' checkbox is checked. The 'Network Node Name' field is empty. A 'Save' button is located below the fields. At the bottom, there is a 'Return to Search' button and a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Portal tab

- a. Set the Content URI Text field to `http://modelingserver/psc/pshome`.
  - b. Set the Portal URI Text field to `http://modelingserver/psp/pshome`.
  - c. Make sure that the Portal Host Node check box is selected.
8. On the Node Definitions tab, set up the remote node as follows:
- a. Use the same name as the default local node for the production instance.

- b. Set the same authentication option as you specified for the same node name in the production instance.

In the example below, PSFT\_EP is the default local node in the production database, so the same named node is created in the modeling database.

Node Definitions		Connectors	Portal	WS Security	Routings
Node Name	PSFT_EP				
*Description	Financials/Supply Chain-REMOTE				
*Node Type	PIA	<input type="checkbox"/> Default Local Node <input type="checkbox"/> Local Node <input checked="" type="checkbox"/> Active Node <input type="checkbox"/> Non-Repudiation <input type="checkbox"/> Segment Aware			
*Authentication Option	Password				
Node Password	.....				
*Default User ID	VP1				
Hub Node					
Master Node					
Company ID					
IB Throttle Threshold					
Image Name					
Codeset Group Name					
		Contact/Notes	Properties		
		Save			
		Return to Search			
Node Definitions   Connectors   Portal   WS Security   Routings					

Node Definitions tab

9. On the Portal tab, set the Content URI Text and Portal URI Text values to use the domain for the production instance, as follows:

The screenshot shows the 'Portal' tab configuration for a node named 'PSFT\_EP'. The 'Details' section is active. The 'Description' is 'Financials/Supply Chain-REMOTE'. The 'Tools Release' is '8.54'. The 'Application Release' is 'Financials/SCM 9.20.'. The 'Content URI Text' field contains 'http:// server.us.example.com :8000/psc/ps/' with an example URL above it. The 'Portal URI Text' field contains 'http:// server.us.example.com :8000/psp/ps/' with an example URL above it. The 'Local Node' checkbox is checked. The 'Portal Host Node' checkbox is unchecked. The 'Network Node Name' field is empty. There are 'Save' and 'Return to Search' buttons at the bottom.

Portal tab

- Set the Content URI Text field to `http://productionserver/psc/pshome`.
  - Set the Portal URI Text field to `http://productionserver/psp/pshome`.
10. Set up the portal default on the Portal Definitions page, as follows:

- a. Log on to your database through PeopleSoft Pure Internet Architecture using a portal other than the EMPLOYEE portal and select PeopleTools, Portal, Portal Definitions.

The system will not allow you to change the "Hosted by this node" field value if you log in through the EMPLOYEE portal. In the following example, the PARTNER portal and host LOCAL\_NODE are used to log on with [http://modelingserver/psc/ps/PARTNER/LOCAL\\_NODE/?cmd=login](http://modelingserver/psc/ps/PARTNER/LOCAL_NODE/?cmd=login):

**Portal Definitions**

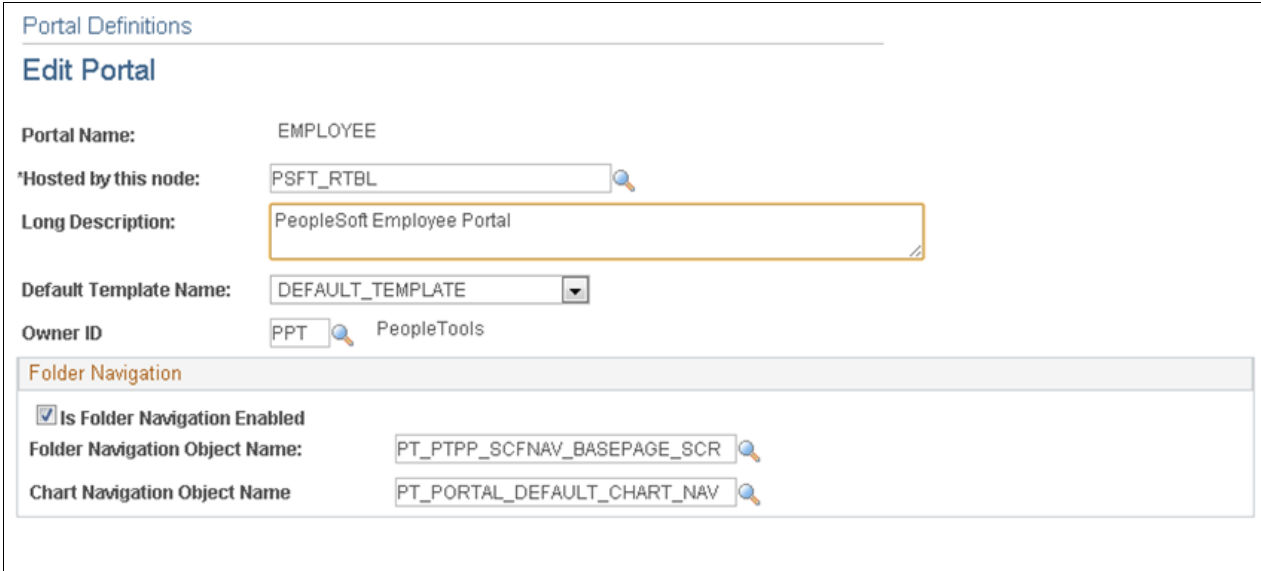
Current Portal: PARTNER

Portal Definitions				Personalize	Find	First	1-7 of 7	Last
Portal Type	Portal Name	Hosted by this node	Default	Edit	Add	Delete		
Local	CUSTOMER	ERP	<input type="checkbox"/>	Edit	Add	Delete		
Local	EMPLOYEE	ERP	<input checked="" type="checkbox"/>	Edit	Add	Delete		
Local	MOBILE	LOCAL_NODE	<input type="checkbox"/>	Edit	Add	Delete		
Local	PARTNER	LOCAL_NODE	<input type="checkbox"/>		Add			
Local	PORTAL	LOCAL_NODE	<input type="checkbox"/>	Edit	Add	Delete		
Local	PS_SITETEMPLATE	LOCAL_NODE	<input type="checkbox"/>		Add			
Local	SUPPLIER	ERP	<input type="checkbox"/>	Edit	Add	Delete		

Portal Definitions page

- b. On the Portal Definitions page, click the Edit button in the row for the EMPLOYEE portal.

- c. Change the "Hosted by this node" field value to *PSFT\_RTBL*, as shown in this example of the Edit Portal page:



Portal Definitions

### Edit Portal

Portal Name: EMPLOYEE

'Hosted by this node': PSFT\_RTBL

Long Description: PeopleSoft Employee Portal

Default Template Name: DEFAULT\_TEMPLATE

Owner ID: PPT PeopleTools

Folder Navigation

☒ Is Folder Navigation Enabled

Folder Navigation Object Name: PT\_PTPP\_SCFNAV\_BASEPAGE\_SCR

Chart Navigation Object Name: PT\_PORTAL\_DEFAULT\_CHART\_NAV

Edit Portal page

The Portal Definitions page will now display the value *PSFT\_RTBL* in the "Hosted by this node" column, as shown:



**Portal Definitions**

Current Portal: PARTNER

Portal Definitions				Personalize	Find	First	1-7 of 7	Last
Portal Type	Portal Name	Hosted by this node	Default	Edit	Add	Delete		
Local	CUSTOMER	ERP	<input type="checkbox"/>	Edit	Add	Delete		
Local	EMPLOYEE	PSFT_RTBL	<input checked="" type="checkbox"/>	Edit	Add	Delete		
Local	MOBILE	LOCAL_NODE	<input type="checkbox"/>	Edit	Add	Delete		
Local	PARTNER	LOCAL_NODE	<input type="checkbox"/>		Add			
Local	PORTAL	LOCAL_NODE	<input type="checkbox"/>	Edit	Add	Delete		
Local	PS_SITETEMPLATE	LOCAL_NODE	<input type="checkbox"/>		Add			
Local	SUPPLIER	ERP	<input type="checkbox"/>	Edit	Add	Delete		

Portal Definitions page

11. Select PeopleTools, Portal, Node Definitions.
12. On the Node Definitions tab, set up the ERP node similarly to the PSFT\_RTBL node, as follows:

- a. Select the Local Node check box to set the ERP node as a local node, as shown in the following example:

The screenshot displays the 'Node Definitions' tab in the PeopleSoft Real-Time Bottom Line interface. The form is configured for an ERP node. The 'Local Node' checkbox is checked, indicating it is a local node. Other fields include Node Name (ERP), Description (Portal Node - ERP), Node Type (PIA), Authentication Option (None), Default User ID (VP1), Hub Node, Master Node, Company ID, IB Throttle Threshold, Image Name, and Codeset Group Name. There are buttons for Copy Node, Save, and Return to Search, and a breadcrumb trail at the bottom.

Field	Value
Node Name	ERP
*Description	Portal Node - ERP
*Node Type	PIA
*Authentication Option	None
*Default User ID	VP1
Hub Node	
Master Node	
Company ID	
IB Throttle Threshold	
Image Name	
Codeset Group Name	

Checkboxes: ☐ Default Local Node, ☒ Local Node, ☒ Active Node, ☐ Non-Repudiation, ☐ Segment Aware

Buttons: Copy Node, Save, Return to Search

Breadcrumb: Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions tab

- b. Verify that the authentication option is set to *None*.

13. On the Portal tab, set the Content URI Text and Portal URI Text values to match the values for the PSFT\_RTBL node using the domain for the modeling instance, as shown in this example:

Node Name ERP

**Details**

Description Portal Node - ERP ☒ Local Node

Default Portal EMPLOYEE

Tools Release 8.54

Application Release Financials/SCM 9.20.

Content URI Text Example: http://someserver/psc/pshome/  
http://server.us.example.com:8020/psc/ps/

Portal URI Text Example: http://someserver/psp/pshome/  
http://server.us.example.com:8020/psp/ps/

☐ Portal Host Node

Network Node Name

Save

Return to Search

Node Definitions | Connectors | Portal | WS Security | Routings

#### Portal tab

- Set the Content URI Text field to `http://modelingserver/psc/pshome`.
- Set the Portal URI Text field to `http://modelingserver/psp/pshome`.

14. Select PeopleTools, Security, Security Objects, Single Signon.

The Single Signon page appears.

Message Node Name	Description	Local Node
E92RTD02	Financials/Supply Chain	1
EP920MST	Production default local node	

Single Signon page

15. Set up trusted nodes for Single Signon by adding the remote node name matching the default local node for the production instance.

### Task 1-15-3: Setting Folder Security for RTBL

In this task, you set the security for access to the Real Time Bottom Line folders in the production and modeling instances.

1. For both the production and modeling instances, do the following:
  - a. Purge the cache.
  - b. Reboot the web and application servers.
2. Set the folder security so that only appropriate users have access to the Real Time Bottom Line menu folder and subfolders in the production and modeling instances, as follows:
  - a. Select PeopleTools, Portal, Structure and Content.

- b. Click Edit in the row for the Real Time Bottom Line folder and then select the Folder Security tab, as shown:

Folder Administration | **Folder Security**

Root > Real Time Bottom Line

### Folder Security

Label: Real Time Bottom Line

☐ Public  
☐ Author Access

Security Authorizations					Personalize	Find	First	1 of 1	Last
Type	Name	Description	Cascade	View Definition					
Permission List	ALLPAGES	ALLPAGES	<input type="checkbox"/>	View Definition					

Inherited Security Authorizations				Personalize	Find	First	1 of 1	Last
Type	Name	Description	View Definition					
			View Definition					

Save Notify

Folder Administration | Folder Security

Folder Security tab

- c. Set the folder security for the Real Time Bottom Line folder.
- d. Optionally, set the security for each of the components under the Real Time Bottom Line folder, as appropriate.

## Task 1-15-4: Verifying Single Portal Installation

After you have completed the Portal configuration, you must verify the single portal installation.

To verify the single portal installation:

1. Log on to the production instance and navigate to the Real Time Bottom Line folder.

## 2. Select Real Time Bottom Line, System Configuration, Record Mapping.

Record Mappings

\*Record Mapping Type: TAO to GTT

Mapping Entries

Personalize | Find | First 1-80 of 80 Last

*Base Record Name	*Record Name	*Record Mapping Type	Record Mapping ID		
ALC_AMT_TAO	ALC_AMT_G	TAO to GTT		+	-
ALC_BASF_TAO	ALC_BASF_G	TAO to GTT		+	-
ALC_BASV_TAO	ALC_BASV_G	TAO to GTT		+	-
ALC_BASX_TAO	ALC_BASX_G	TAO to GTT		+	-
ALC_BULED_TAO	ALC_BULED_G	TAO to GTT		+	-
ALC_BU_TAO	ALC_BU_G	TAO to GTT		+	-
ALC_CLOG_TAO	ALC_CLOG_G	TAO to GTT		+	-
ALC_GL_BS_TAO	ALC_GL_BS_G	TAO to GTT		+	-
ALC_GL_B_TAO	ALC_GL_B_G	TAO to GTT		+	-
ALC_GL_OS_TAO	ALC_GL_OS_G	TAO to GTT		+	-
ALC_GL_O_TAO	ALC_GL_O_G	TAO to GTT		+	-
ALC_GL_P_TAO	ALC_GL_P_G	TAO to GTT		+	-
ALC_GL_TB_TAO	ALC_GL_TB_G	TAO to GTT		+	-
ALC_GL_TS_TAO	ALC_GL_TS_G	TAO to GTT		+	-
ALC_GL_TX_TAO	ALC_GL_TX_G	TAO to GTT		+	-

Save Notify

Record Mappings page

3. Select one of the menu items and press Ctrl + J (or equivalent key combination for your browser) and check that the database is the modeling database.

An example of a record mapping page follows:

Favorites ▾ Main Menu ▾ > Real Time Bottom Line ▾ > System Configuration ▾ > Record Mapping	
ORACLE	
Browser	IE/11.0
Operating System	WIN7
Browser Compression	ON (gzip)
Tools Release	8.54.11
Application Release	Financials/SCM 9.20.00.000
Service Pack	0
Page	RECNAME_MAPPING
Component	RECNAME_MAPPING
Menu	RTBL_PROCESSES
User ID	VP1
Database Name	RTBL
Database Type	ORACLE
Application Server	// server1
Component Buffer Size (KB)	52

Record Mapping page

4. Repeat step 3 for all the menu items, as necessary, to make sure the page is initiated at the modeling database.

If you see the message "Error 404 – Not Found...The server has not found anything matching the Request-URI," check that the Content URI Text and Portal URI Text values on the Portal tab of all related node definitions, (production database node, modeling database node, PSFT\_RTBL node, and ERP node) are correct and formatted to match the example shown on the Portal tab.

## Task 1-16: Completing Post-Installation Setup and Configuration

After you have verified your RTBL installation, you can continue with the PeopleSoft Integration Broker manual setup steps for RTBL tree deployment and RTBL post-installation configuration steps in the product documentation for PeopleSoft In-Memory Real-Time Bottom Line 9.2: Implementing PeopleSoft Real-Time Bottom Line.

You may choose to maintain effective dated ChartField rows (EDR) data in the production environment as well as the modeling environment. In addition, you can maintain the synchronization of EDR data between the production and modeling environments. When a ChartField is updated on the production schema, the EDR data on the modeling schema will be synchronized simultaneously. Similarly, when a ChartField is deployed from the modeling schema to the production schema, the EDR data on the production schema will be synchronized simultaneously. The synchronization process uses service operation messages to transfer the information. You must set up and activate these services.

See the product documentation for PeopleSoft In-Memory Real-Time Bottom Line 9.2 for information about setting up EDR synchronization for ChartFields.

