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PeopleSoft Enterprise Learning Management 9.2 (through Update Image 16) Installation

July 2017

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PeopleSoft Enterprise Learning Management 9.2 (through Update Image 16)
Installation
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About This Documentation

This preface discusses:

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

Understanding This Documentation

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

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

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

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

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

Audience

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

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

- SQL and SQL command syntax.
- PeopleSoft system navigation.
- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

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

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

Typographical Conventions

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

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

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

Products

This documentation may refer to these products and product families:

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

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Related Information

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

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

To access documentation on My Oracle Support, go to https://support.oracle.com.

To access PeopleSoft Online Help (PeopleBooks), go to the Oracle PeopleSoft Online Help site:

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

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

PSOFT-Infodev_US@oracle.com

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

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Chapter 1

Preparing for Installation of PeopleSoft Enterprise Learning Management 9.2

This chapter discusses:

- Prerequisites
- Using Fluid User Interface

Prerequisites

The following requirements must be met before you install PeopleSoft Enterprise Learning Management (ELM) 9.2:

- PeopleSoft PeopleTools version.

  To run PeopleSoft ELM 9.2, you must use PeopleSoft PeopleTools 8.56.01 or higher. PeopleSoft PeopleTools patches are available on My Oracle Support.

  See My Oracle Support.
- Space requirements for the PeopleSoft ELM 9.2 Demo database

  The following table lists the approximate PeopleSoft ELM 9.2 Demo database size for each platform:

Platform	Approximate Database Size for ANSI	Approximate Database Size for Unicode
DB2 UNIX	9 GB	12.5 GB
DB2 z/OS	7 GB *(EBCDIC)*	7 GB
Microsoft SQL Server	3.2 GB	4 GB
Oracle	8.7 GB	8.7 GB

- Elasticsearch engine

  Several features in PeopleSoft ELM make use of Elasticsearch, a search engine product that is delivered with PeopleSoft PeopleTools.

  For details and more information on the installation and configuration of Elasticsearch,

  See PeopleTools Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.

  See *PeopleTools: System and Server Administration*.

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Task 1-1: Using Fluid User Interface

When you sign in to your PeopleSoft application, you may see the PeopleSoft Fluid User Interface by default. To access the menu items, as seen in the classic user interface, from the PeopleSoft Fluid User Interface:

1. On the PeopleSoft Fluid User Interface, shown in this example, select (press) the NavBar button at the top right, which looks like a compass.

PeopleSoft Fluid User Interface home page

The Navigation bar (NavBar) side page appears.

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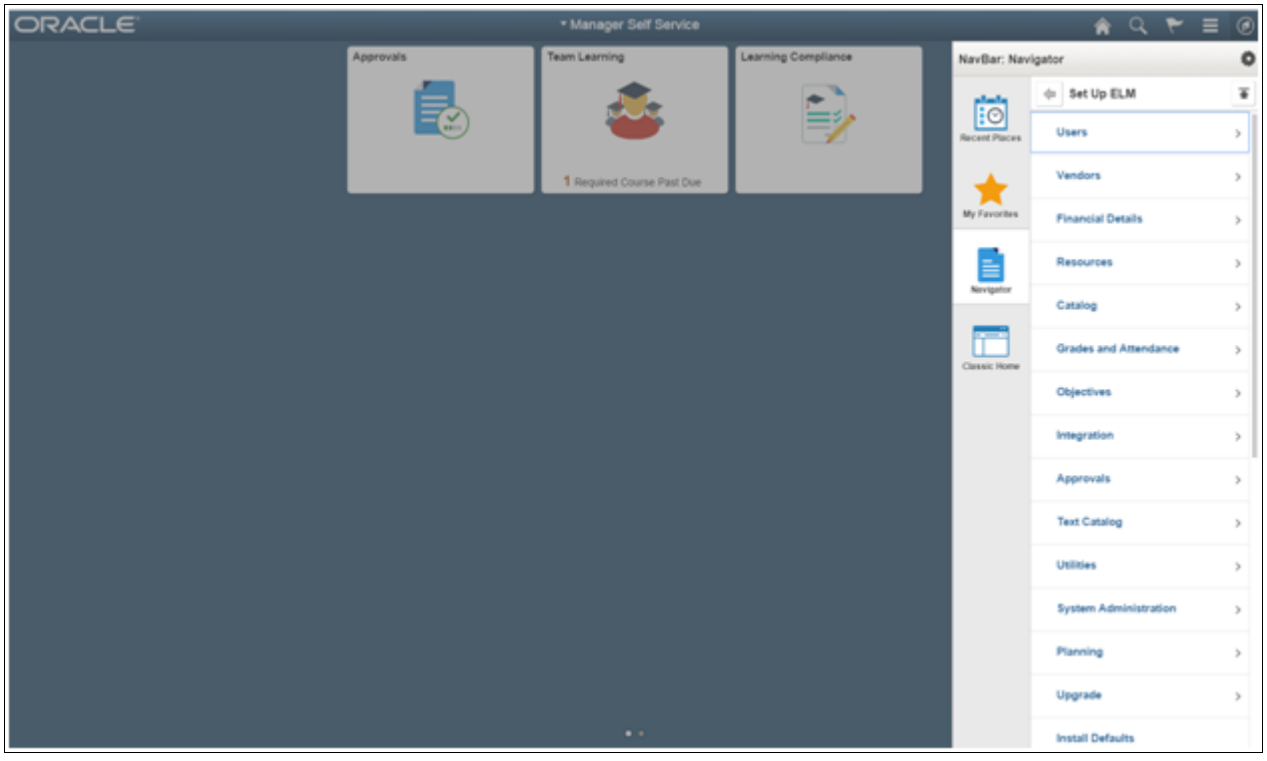
2. Select (press) Navigator.

NavBar side page

The menu structure appears.

3. Navigate to the desired item, such as Set Up ELM or PeopleTools.



Navigator side page with PeopleSoft menu items

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See PeopleTools: Applications User's Guide, Working With Fluid Homepages

See PeopleTools: Fluid User Interface Developer's Guide

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Chapter 2

Installing PeopleSoft Enterprise Learning Management 9.2

This chapter discusses:

- Installing PeopleSoft PeopleTools and PeopleSoft Application Software
- Configuring the System for File Attachments
- Configuring Enterprise Integration Points
- Running LMOPRD.DMS to Clear Sample User Profiles
- Configuring Global Search
- Accessing PeopleSoft Applications

Task 2-1: Installing PeopleSoft PeopleTools and PeopleSoft Application Software

PeopleSoft applications built on PeopleTools 8.56 are delivered as deployment packages (DPKs), which include the installation files for both the PeopleSoft 9.2 application and PeopleSoft PeopleTools 8.56.

For information on obtaining and installing PeopleSoft applications,

See PeopleSoft 9.2 Application Installation for your database platform and for the current PeopleSoft PeopleTools release.

Install PeopleSoft PeopleTools as described in the "PeopleSoft PeopleTools 8.56 Installation Guide" for your database platform, on My Oracle Support.

Note that the DPK setup supports only installations in which the PS_APP_HOME location, which contains the PeopleSoft application software, is not the same as the PS_HOME location, which contains the PeopleTools software.

See PeopleSoft Update Manager (PUM) Home Page, My Oracle Support, Doc ID 1641843.2.

See Oracle's PeopleSoft PeopleTools 8.56 Home Page, My Oracle Support, Doc ID 2259140.2.

Task 2-2: Configuring the System for File Attachments

The File Attachments feature allows you to store documents and other files in your database for users to download. If you are using multiple application servers to support file attachment functionality, you may need to modify the security configuration on your application servers to accommodate this feature. For more information on how to configure application servers to support file attachments, consult the PeopleSoft PeopleTools documentation.

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See *PeopleTools: PeopleCode Developer's Guide,* "Application Deployment and System Configuration Considerations."

Task 2-3: Configuring Enterprise Integration Points

The PeopleSoft Integration Broker and Enterprise Integration Points (EIP) provide a flexible and robust way for you to integrate multiple PeopleSoft databases or additional component systems. For a detailed technical discussion of the configuration and use of EIPs in PeopleSoft ELM, refer to *PeopleSoft ELM 9.2 Enterprise Learning Management,* available on My Oracle Support.

Task 2-4: Running LMOPRD.DMS to Clear Sample User Profiles

Running the LMOPRD.DMS script clears sample user profiles from the PeopleSoft PeopleTools security tables in preparation for live implementation. This is helpful for security reasons and also minimizes the maintenance of user profiles that are not in active use.

Warning! The LMOPRD.DMS script must only be run in the .SYS database, not in the .DMO database.

Use PeopleSoft Data Mover to run the following script, located in the <PS_APP_HOME>\scripts directory:

`LMOPRD.DMS`

Task 2-5: Configuring Global Search

This section discusses:

- Understanding Configuring Global Search
- Defining New Roles for Global Search
- Defining Search Group Display in Global Search Header
- Verifying the Portal Node for PeopleSoft ELM 9.2
- Deploying Searches
- Creating Search Indexes

Understanding Configuring Global Search

PeopleSoft Search Framework is a PeopleTools indexed search technology that relies on the use of a predefined search engine by way of PeopleSoft Integration Broker. It supports Elasticsearch as the Search Engine. PeopleSoft Integration Broker provides the interface between PeopleSoft Search Framework and Elasticsearch to deploy PeopleSoft Search, build the indexes, and return the search results.

Important! There are deployment and sizing considerations which should be determined prior to implementation of search. Review the document "Elasticsearch Homepage" (Document ID: 2205540.2) on My Oracle Support for more information. This page provide information regarding the essential hardware to help ensure capacity for peak concurrent usage of your PeopleSoft 9.2 environment. Failing to follow these recommendations can impact the performance and stability of your PeopleSoft 9.2 environment.

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See the PeopleSoft Search Framework information in the product documentation for PeopleTools: PeopleSoft Search Technology for your new release for details about configuring PeopleSoft Search.

Task 2-5-1: Defining New Roles for Global Search

The following roles for the Global Search and Search Pages are provided. Your PeopleSoft administrator needs to complete the steps below to add roles.

To add new roles for the Global Search:

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

Role	Permission List	Search
Search- Learning	LMLELM0810	Global Search

In addition, you can create roles for users who access the Search Definitions and are allowed to run and schedule the search indexes.

Create the following roles, as listed in this table:

Role	Permission List	Description
Search Administrator	PTPT3100	Search Admin

Task 2-5-2: Defining Search Group Display in Global Search Header

For the Search Group to display in the Global Search Header and drop-down list, you must add the Search Group to the Home Page Search Context, before you can enable the Global Search box in the header.

To add the Search Group to the Home Page Search Context:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand the Administration section, and select Define Search Context.
2. On the Define Search Context page, open the Search Context for Context Type "Home Page".
3. Verify the Search Groups as shown in this table.

   The following table lists the fields and values in the Define Search Context page, for example for Home Page:

Default	Sequence	Search Category Name	Description
Checked	1	LS_LM_LEARNING	Learning

To enable the Global Search box in the header:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand the Configuration section, and select Enable Global Search.

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2. Select Display Global Search in Header check box.
3. Click Save.

Task 2-5-3: Verifying the Portal Node for PeopleSoft ELM 9.2

In this step you will verify the setup of the Portal Node in your PeopleSoft ELM environment.

To verify the Portal Node in your PeopleSoft ELM 9.2 environment:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand the Configuration section, and select Setup Local Nodes.
2. On the Nodes search page, search for and select the Portal node ELM.

   The Node Definitions page appears.
3. On the Node Definitions page, select the Portal tab to access the Portal page.
4. On the Portal page, in the Content URI field, verify that you have entered an address that corresponds to your PeopleSoft ELM environment.

   For example: http://<server>:<port>/psc/pshome/
5. In the Portal URI field, verify that you have entered an address that corresponds to your PeopleSoft ELM environment.

   For example: http://<server>:<port>/psp/pshome/
6. Click Save.
7. Click Return to Search (optional).

Task 2-5-4: Deploying Searches

Oracle delivers PeopleSoft ELM search modules for which predefined global searches and search page keyword searches are provided.

Note. You must verify that the roles are assigned to the user, before you deploy a search definition.

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

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

   Search Query Administrator.

The following table lists the PeopleSoft ELM search modules for which predefined global searches and search page keyword searches are provided:

Search Module	Search Type	Category Name
ELM	Global Search	LS_LM_LEARNING

For each of the Search definitions that Oracle delivers:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand the Administration section, and select Deploy/Delete Object.

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2. Select Deploy Search Definition tab. This is the default tab when navigating to this page.
3. Select Deploy in the check box column for the following search definitions:
   - *LS_LM_ACT_CI* (Courses)
   - *LS_LM_OBJV* (Objectives)
   - *LS_LM_PRG* (Programs)
4. Click Deploy button. The column Deploy Status changes to *Deployed* for all the three search definitions.
5. Select Deploy Search Category tab.
6. Select the search category, *LS_LM_LEARNING* (Learning).
7. Select Deploy. The column Deploy Status changes to *Deployed* for *LS_LM_LEARNING* (Learning).

Note. The ELM Search will only be available from HCM database if an ELM database has been configured to use the same search instance (Elasticsearch).

Task 2-5-5: Creating Search Indexes

In this step you will create search indexes.

To create search indexes:

1. Select Enterprise Learning, Catalog, Rebuild Indexes.
2. Create a new run control ID.
3. Select Search Definition *LS_LM_ACT_CI.*
4. Select Full index on Indexing type.
5. Select Base Language on Language Option.
6. Click Run.
7. Select Search Index Feed Generation Process (PTSF_GENFEED).
8. Process must run to success.

Repeat steps 1 through 8 with Search Definitions *LS_LM_OBJV* and *LS_LM_PRG.*

Task 2-6: Accessing PeopleSoft Applications

Perform this task only if you use the PeopleSoft Portal Solutions product and want to access your application from within the PeopleSoft Interaction Hub database.

The installation phase of your PeopleSoft application should only entail setting up a single link to the PeopleSoft application content provider. To set up the single link and the single sign-on, see the latest release of *Portal Solutions 9.1* guide on My Oracle Support.

The chapter "Installing PeopleSoft Single Sign-On" discusses setting up single sign-on to your application database.

The chapter "Accessing PeopleSoft Content Providers" discusses accessing the PeopleSoft content providers.

The appendix chapters discuss additional product-specific steps that you may need to perform for fully functional navigation within the PeopleSoft Interaction Hub database.

See the latest release of Portal Solutions Installation guide.

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