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# PeopleSoft Financials/Supply Chain Management 9.2 (Through Update Image 25) Installation

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**September 2017**

PeopleSoft Financials/Supply Chain Management 9.2 (Through Update Image 25)

## 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

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

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

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

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

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

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

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See <http://www.oracle.com/applications/peoplesoft-enterprise.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 and on the Oracle PeopleSoft Online Help site:

- 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:

[http://docs.oracle.com/cd/E17566\\_01/epm91pbr0/eng/psbooks/psft\\_homepage.htm](http://docs.oracle.com/cd/E17566_01/epm91pbr0/eng/psbooks/psft_homepage.htm).

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 Online Help (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.

## Chapter 1

# Preparing for Installation

This chapter discusses:

- Understanding the Installation
- Installing PeopleSoft PeopleTools and PeopleSoft Application Software
- Reviewing the Demo Database Size
- Using the Fluid User Interface

## Understanding the Installation

---

This documentation includes pre-installation requirements, installation notes, and installation and configuration instructions specific to PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 applications. This documentation is organized into sections by PeopleSoft application products. This chapter includes prerequisite information for the PeopleSoft FSCM 9.2 installation.

## Task 1-1: 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.

See PeopleSoft PeopleTools 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.

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**Note.** Use of authentication domain in web profile is needed for Single Sign-On implementation.

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## Task 1-2: Reviewing the Demo Database Size

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The following table lists the approximate PeopleSoft FSCM 9.2 Demo database size for each RDBMS platform.

Platform	Approximate Database Size
Oracle — Unicode/ANSI	19 GB
DB2 LUW — ANSI	58 GB
DB2 LUW — Unicode	88 GB
DB2 z/OS — ANSI	41 GB
DB2 z/OS — Unicode	47 GB
Microsoft SQL Server — ANSI	8.55 GB
Microsoft SQL Server — Unicode	11.5 GB

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

---

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

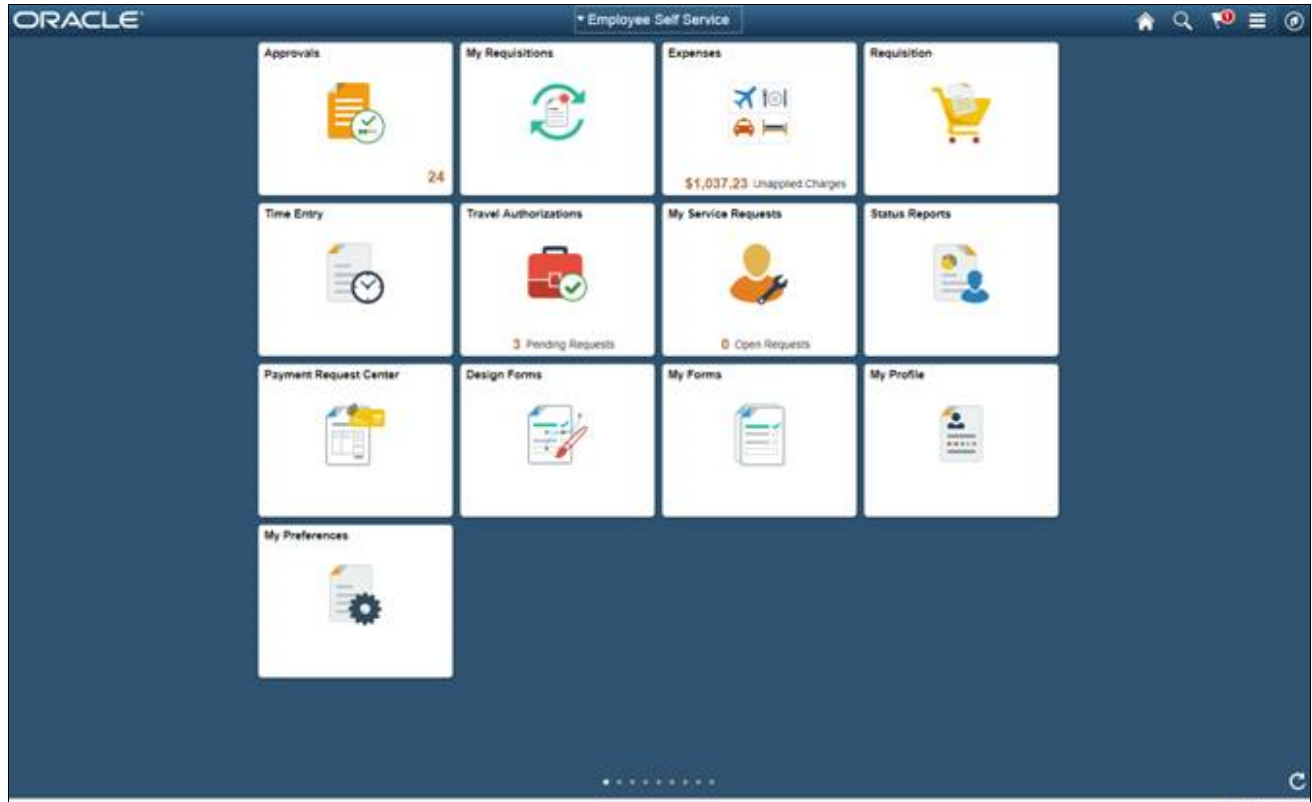
---

## Task 1-3: Using the 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:

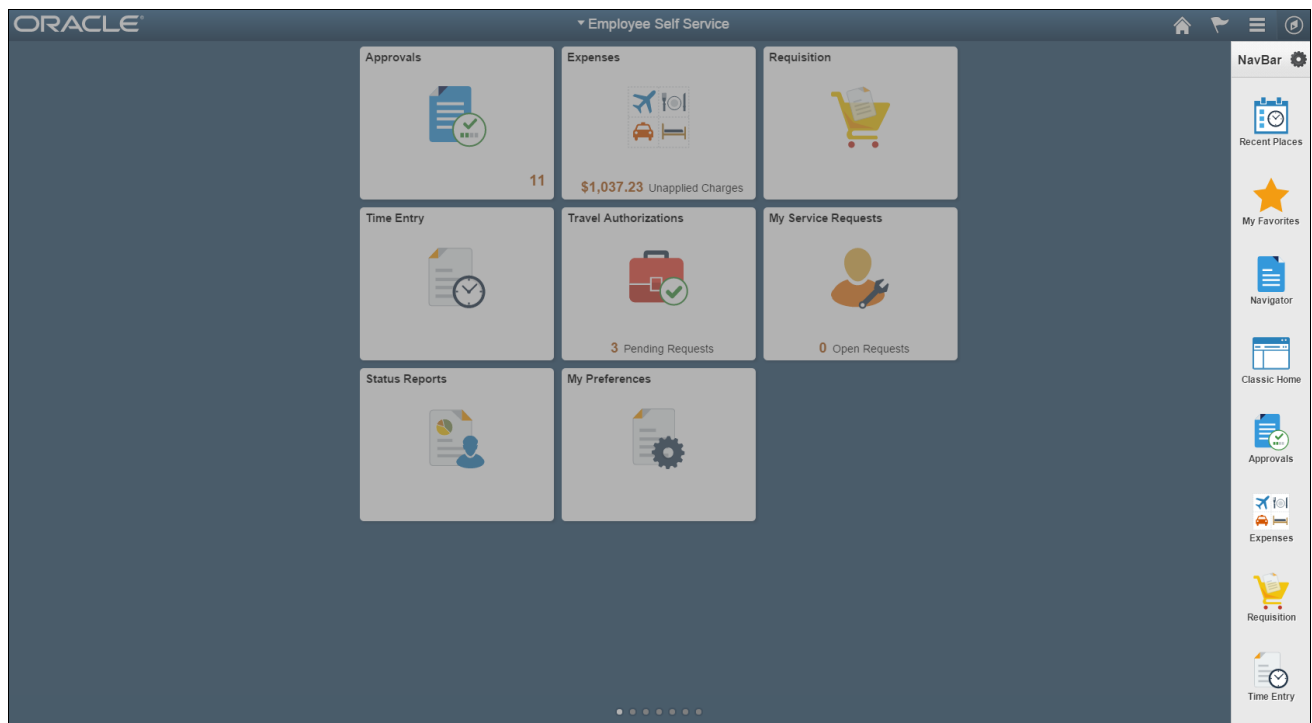
1. On the PeopleSoft Fluid User Interface, shown in this example, select (press) the NavBar button at the top right, which looks like a compass.



PeopleSoft Fluid User Interface home page

The Navigation bar (NavBar) side page appears.

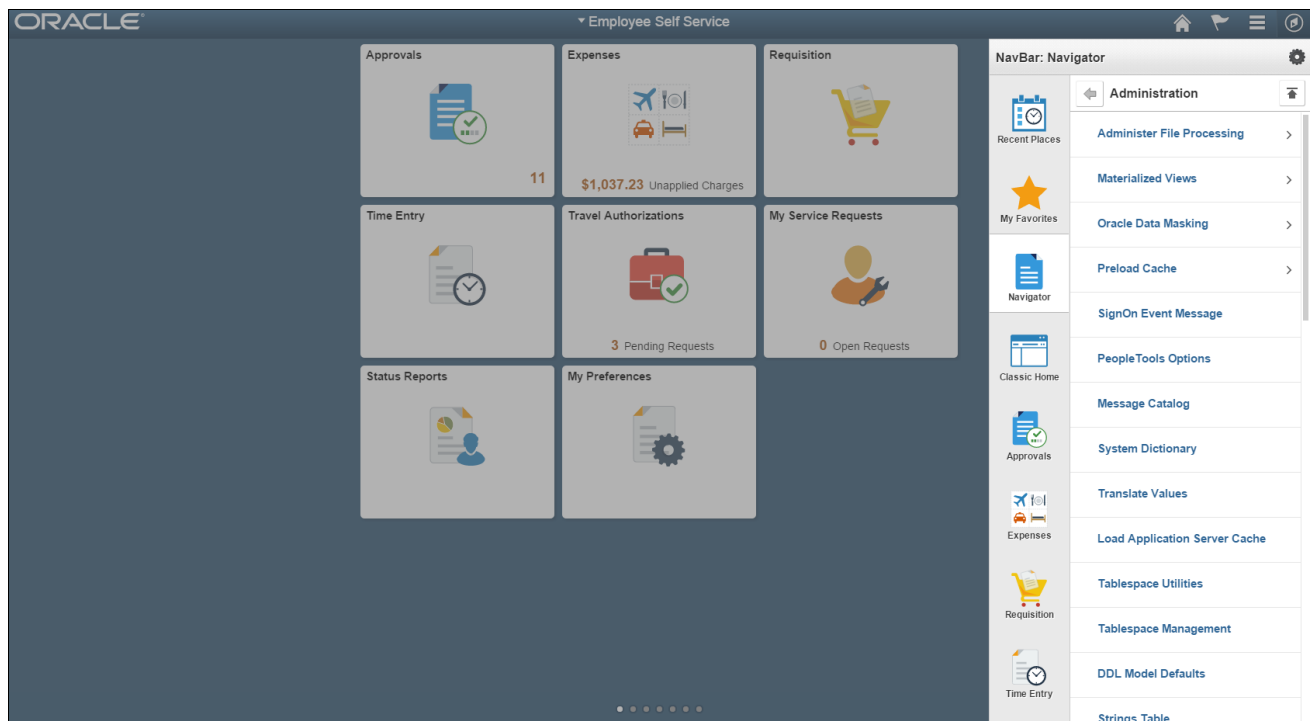
2. Select (press) Navigator.



Navigator side page with PeopleSoft menu items

The menu structure appears.

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



Navigator side page with PeopleSoft menu items

## See Also

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

*PeopleTools: Fluid User Interface Developer's Guide*





## Chapter 2

# Setting Up the PeopleSoft Financials/Supply Chain Management Database

This chapter discusses:

- Setting Up Installation Defaults for the System Database
- Deleting Summary Trees for the System Database
- Reviewing DB2 z/OS Requirements
- Setting Up the Database for the Chartfield Configuration Process
- Accessing FSCM Applications from PeopleSoft Portal Solutions

### **Task 2-1: Setting Up Installation Defaults for the System Database**

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

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

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

### **Task 2-2: 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. This only runs against the System (SYS) database.

### **Task 2-3: Reviewing DB2 z/OS Requirements**

This section discusses:

- Reviewing the EDM Pool Size
- Reviewing the Server Transfer Program Log

## Task 2-3-1: Reviewing the EDM Pool Size

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

## Task 2-3-2: Reviewing the Server Transfer Program Log

As a DB2 z/OS customer, you may see the following error message in the log file PSXFR.LOG that is generated when you run the PeopleSoft Server Transfer program:

```
501 Invalid data set name <name>. Use MVS Dsname conventions
```

---

**Note.** For details on PeopleSoft Server Transfer program, review the chapter "Setting Up the Batch Environment on z/OS" in PeopleTools Installation for DB2 for zOS for the current PeopleTools release found in My Oracle Support.

---

Ignore this error for the following files because they are not used in a DB2 z/OS environment:

- 853AUDRT.SQR
- 854AUDRT.SQR
- 853INDRT.SQC
- 853TBLRT.SQC
- 853TRGRT.SQC
- 854INDRT.SQC
- 854TBLRT.SQC
- 854TRGRT.SQC

## Task 2-4: Setting Up the Database for the Chartfield Configuration Process

---

This section discusses:

- Understanding Database Requirements for the ChartField Configuration Process
- Defining Settings for the ChartField Configuration Process

## Understanding Database Requirements for the ChartField Configuration Process

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

## Task 2-4-1: Defining Settings for the ChartField Configuration Process

### *DB2 LUW*

- Update the locking mode to share:

```
db2set DB2_RR_TO_RS=yes
```

---

**Note.** This parameter is depreciated from DB2 LUW version 10.1 onwards.

---

- Include the following command in the DBMCFG.SQL configuration file:

```
UPDATE DBM CFG USING QUERY_HEAP_SZ 64000
```

- Log file size (4KB): (LOGFILSIZ) = 24000
- Number of primary log files: (LOGPRIMARY) = 20
- Use the following minimum Tablespace sizes (you may need to increase these sizes):
  - BDAPP — 9720
  - BDAPPIDX — 2680
  - BDLARGE — 1191
  - FAAPP — 11312
  - FSLARGEIDX — 13568
  - LCAPP — 28572
  - LCAPPIDX — 2600
- Recycle the instance after changing the settings.

### *DB2 z/OS*

Oracle recommends no changes.

### *Microsoft SQL Server*

Oracle recommends no changes.

### *Oracle*

- Rollback or UNDO Tablespace = 1536MB
- Rollback Segment sizing: Initial Extent + (Next Extent \* Maxextents) = 1024 MB (approximate)
- dml\_locks = 1024 (set in init.ora)

Changing the dml\_locks setting requires that you recycle the instance.

## Task 2-5: Accessing FSCM Applications from PeopleSoft Portal Solutions

---

Only perform this task if you use the PeopleSoft Portal Solutions product and want to access your PeopleSoft Financials, ESA, or SCM application from within the PeopleSoft Portal Solutions 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 following sections of the PeopleSoft Portal Solutions installation documentation:

- "Installing PeopleSoft Single Sign-On"
  - "Accessing PeopleSoft Content Providers"
  - "Installing Services Procurement Navigation"
  - "Creating Content Provider Navigation Collections (Recommended)" discusses additional product-specific steps you may need to perform for fully functional navigation within the PeopleSoft Portal Solutions database.
- See PeopleSoft Portal Solutions Installation for the current PeopleTools release in My Oracle Support.

## Chapter 3

# Configuring Application SQRs and COBOL for the DB2 z/OS Server

This chapter discusses:

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

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

---

This section applies if you are running PeopleSoft FSCM 9.2 on the DB2 z/OS database platform and want to run SQR and COBOL processes on the z/OS server that require reading and writing of external files.

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

PeopleSoft General Ledger and PeopleSoft Cash Management both contain several of these special files in certain SQR processes. To accommodate these files, data sets must be pre-allocated on the z/OS file system, as well as modifications made to the JCL shells.

### Task 3-1: Allocating Data Sets on the z/OS File System

---

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

All like processes share the same JCL Shells. An invalid file disposition in the process can prevent that process and all the processes from executing successfully. For this reason Oracle recommends using DISP=SHR in the JCL Shells, as discussed later in this document. DISP=SHR presumes that the data set exists at the time a job execution is initiated. If the data set does not exist, a JCL error occurs. The PDS requires only the root data set, for if the individual member does not need to exist. If the member does not exist, it is automatically created by the z/OS file management system.

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

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

Refer to the table below for SQR LRECL definitions.

- The data set name type should be PDS (DSORG=PO).

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

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

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

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

<sup>1</sup> DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

<sup>2</sup> Random name uses a member name of A%INSTANCE%

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

PeopleSoft Inventory:

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

<sup>1</sup> DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

<sup>2</sup> Random name uses a member name of A%INSTANCE%

PeopleSoft Manufacturing:

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

<sup>1</sup> DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

<sup>2</sup> Random name uses a member name of A%INSTANCE%

## Task 3-2: Modifying the JCL Shells

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

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

The following is an example of the editing that is required in JCL shell SHELSQRF.JCL to accommodate special files that are referred to as INSQL1 and INSQL2 in the SQR programs (change shown in bold font):

```
// *CTTRANS DD DSN=&SQRHLQ..LINKLIB,DISP=SHR
//SQRDIR DD DSN=&SQRHLQ..ERRDAT,DISP=SHR
//SI DD DSN=&PSHLQ..SQRINC,DISP=SHR
//SYSTEM DD SYSOUT=*
//SYSOUT DD SYSOUT=*
//DBGLOG DD SYSOUT=*
//SYSTMPDB DD UNIT=WORK,SPACE=(TRK,25) VS1 ONLY
//SP DD DSN=&PSHLQ..SQRSRC(&SQRID),DISP=SHR
// * ADD DD STATEMENTS HERE FOR LIBRARY CONCATENATION
// *
//SYSTEM DD SYSOUT=*
// *
%SQROUT%
// *
//SQRPOST DD DSN=&SQRHLQ..DAT(POSTSCRI),DISP=SHR
//SYSERR DD SYSOUT=*
//SYSTSIN DD DSN=&PSHLQ..PARMLIB(NOPARMS),DISP=SHR
//SYSIN DD DSN=&PSHLQ..PARMLIB(&PRMID),DISP=SHR
//SQRINI DD DSN=&PSHLQ..SQRSRC(PSSQRINI),DISP=SHR
//INSQL1 DD DSN=&PSHLQ..INSQRPDS(A%INSTANCE%),DISP=SHR
//INSQL2 DD DSN=&PSHLQ..INSQRPDS(INFILE),DISP=SHR
// PEND
// *
```

```
//%PRCSNAME% EXEC SQRPROC,SQRID=%PRCSNAME%  
//SYSTSIN DD *  
DSN SYSTEM(%DB2SUB%)  
RUN PROG(SQR) -  
PLAN(SQRPLAN) -  
LIB('SYS5.SQR614B1.SQR.UNICODE.LOAD') -  
%SQRFLAGS%  
END  
/*  
//SYSIN DD *  
%SQRPARMS%  
/*
```

If you have already configured a process scheduler, the shells that your configuration uses can be found in:  
<PS\_CFG\_HOME>/appserv/prcs/<process scheduler name>/shelljcl.

---

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

---



## Chapter 4

# Configuring Global Search Using PeopleSoft Search Framework

This chapter discusses:

- Understanding Configuring Global Search Using PeopleSoft Search Framework
- Prerequisites
- Defining New Roles for Global Search
- Defining Search Group Display
- Verifying the Setup of Portal Node in PeopleSoft FSCM
- Identifying FSCM Search Definitions for Attachments
- Deploying and Indexing Delivered Search Definitions
- Upgrading File Attachments

## Understanding Configuring Global Search Using PeopleSoft Search Framework

---

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 provides information concerning configuration of the Elasticsearch environment. 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.

---

See *PeopleSoft FSCM: Applications Fundamentals*.

## Prerequisites

---

This section describes the required setup for Search Framework to enable the Global Search functionality within the Financial/Supply Chain Management product line.

---

**Important!** Elasticsearch configuration requires the installation of PeopleSoft PeopleTools 8.55.11 or higher.

---

**Important!** You should *only* perform these steps if you have completed the tasks discussed in the PeopleTools installation chapter, "Configuring Integration Between PeopleSoft PeopleTools and Search Framework," for your new release.

See the PeopleTools Installation guide for your database platform and current PeopleTools release, "Configuring Integration Between PeopleSoft PeopleTools and Search Framework."

## See Also

*PeopleTools: PeopleSoft Search Technology*

## Task 4-1: Defining New Roles for Global Search

Sample roles are provided for the Global Search and the Search Pages. You will need to determine which users will need access to these roles for searching. Your PeopleSoft administrator needs to complete the steps below to add roles.

To add the roles for search:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. In the grid, add the roles shown in the following table, appropriate to the user who can access the Global Search:

Global Search Category	ROLE	Permission List
Accounts Payable	Search Accounts Payable	EPSR1040
Asset Management	Search Asset Management	EPSR1030
Catalog Items	Search Catalog	EPSR1080
Expenses	Search Expenses	EPSR1050
General Ledger	Search General Ledger	EPSR1060
Procure to Pay	Search PtoP	EPSR1000
Purchasing/Procurement	Search Procurement	EPSR1020
Strategic Sourcing	Search Strategic Sourcing	EPSR1010
Supplier Information	Search Supplier Information	EPSR1080
Supplier Contracts Document	Search Authored Documents	EPSR1090

In addition there are several PeopleTools roles created for users who access the Search Definitions and are allowed to run and schedule the search indexes. These roles are:

- Search Server — required only for the user setup as the Callback user for the Search Instance

- Search Query Administrator — required to access Queries associated with all Search Definitions, this is required for the Callback user as well as for any user who will need to modify these queries.
- Search Administrator — required for any user who will be allowed to submit jobs for indexing.
- Search Developer — required for any user who will be granted access to the design of Search Definitions

See *PeopleTools: PeopleSoft Search Technology*.

## **Task 4-2: Defining Search Group Display**

---

This section discusses:

- Understanding Search Group Display
- Adding the Search Group to the Home Page Search Context
- Enabling the Global Search Box in the Page Header

### **Task 4-2-1: Understanding Search Group Display**

In order 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 and enable the global search box in the header.

### **Task 4-2-2: Adding the Search Group to the Home Page Search Context**

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 Administration section and select Define search context page.
2. On the Define Search Context search page, select *Home Page* from the Context Type drop-down list, and then click Search.

3. Add the Search Groups, as appropriate for your installation, and other values in the grid as needed.

This table lists names, sequence order, and descriptions for the fields and values in the Define Search Context page, for example for the Home Page:

Default	Sequence	Search Category Name	Description
Y	1	EP_PROCURE_TO_PAY	Procure to Pay
N	2	EP_SOURCING	Strategic Sourcing
N	3	EP PROCUREMENT	Purchasing/Procurement
N	4	EP_ASSETS	Asset Management
N	5	EP_PAYABLES	Accounts Payable
N	6	EP_EXPENSES	Expenses
N	7	EP_GENERAL_LEDGER	General Ledger
N	8	EP_VENDORS	Supplier Information
N	9	EP_CATALOG_ITEMS	Catalog Items
N	10	EP_CS_AUTHORED_DOC	Supplier Contract Documents
N	11	PTPORTALREGISTRY	Navigator
N	12	EOFD_FLUID_DISCUSSIONS	FSCM Discussions

4. Click Save.

### Task 4-2-3: Enabling the Global Search Box in the Page Header

To enable the Global Search box in the page header, perform the following steps:

1. Select PeopleTools, Portal, General Settings.
2. Select the Display Global Search in Header check box.
3. Click Save.

### Task 4-3: Verifying the Setup of Portal Node in PeopleSoft FSCM

To verify the Portal Node in the PeopleSoft FSCM environment:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the Portal node *PSFT\_EP*.

The Node Definitions page appears.

3. On the Node Definitions page, select the Portal tab.

- On the Portal page, in the Content URI field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.

For example: *http://<server>:<port>/psc/pshome/*

- In the Portal URI field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.

For example: *http://<server>:<port>/psp/pshome/*

- Click Save.
- Repeat steps 1 through 6 for the ERP Node.

See the product documentation for PeopleTools: PeopleSoft Integration Broker Administration for more information about Integration Broker setup.

## Task 4-4: Identifying FSCM Search Definitions for Attachments

This step contains details on FSCM search definitions that can search for attachments.

Search Attachments are documents that can be included in a Search Index. Depending on the application and setup, attachments can be stored on the FTP server, the SFTP server, or in the database. When attachments are to be included in a search index, they must be defined on the Attachment Properties tab of the Search Definition page. You can also find pre-defined attachments on the Search Definition page.

See the product documentation for PeopleTools: PeopleSoft Search Technology for more information on search definitions and attachments.

This table illustrates the Financials and Supply Chain search definitions that can search for attachments, along with the locations where they are used:

Search Definition	Description	Used In
EP_AM_ASSET	Assets	Global / Search Pages
EP_AP_VENDOR	Suppliers	Global / Search Pages
EP_AP_VOUCHERS	Vouchers	Global / Search Pages
EP_CS_DOC_ADHOC	Adhoc Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_CONTRACTS	Contract Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_PURCHORDRS	Purchase Order Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_SOURCING	Sourcing Event Documents	Search Content in Supplier Contract Mgmt
EP_PO_CONTRACTS	PO Contracts	Global / Search Pages
EP_PO_PURCHASE_ORDERS	Purchase Orders	Global / Search Pages

Search Definition	Description	Used In
EP_PO_REQUISITIONS	Requisitions	Global / Search Pages
EP_SS_EVENTS	Sourcing Events	Global / Search Pages

Before indexing, verify that the URLID list is not blank. Attachments will *not* be indexed if the URLID list is blank.

To verify:

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

On the Search Administration section, click Administration, and select the Attachment URLID List option to view the Attachments URLIDs page, as shown in the following example:

Search Administrator

Search Administration

Legend

Task Progress 0 21

Configuration

- Administration
  - Search Options
  - Search Instance Administration
  - Search Instance/User
  - Deploy/Delete Object
  - Schedule Search Index
  - Domain Status
  - Asynchronous Services
  - Define Search Context
  - View Search Contexts
  - Node In Network
  - Remote Search Groups
  - Attachment URLID List**
- Testing and Utilities

Search Administration Activity guide

Attachment URLIDs

URLID List used by Search Framework Attachments

URLID List	Personalize	Find	View All	First	1-4 of 4	Last
*URL Identifier						
1 EOFD_FILE_ATTACH						
2 PSSESATT_1						
3 PSSESATT_2						
4 PSSESATT_3						

Save

Attachments URLIDs List page

2. Verify that the attachment URL IDs defined in the File Attachment Architecture (SES URL Equivalent column), as shown in the following example, appear on this list:

**Administer File Attachments**

\*Pick Active Server 3 Add URL Server Add FTP Server Add Database Server

File Attachment Servers							Personalize   Find   View All	First  1-4 of 4  Last
ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	SES URL Equivalent	
1	FTP	ftpuser	.....	.....	10.244.0.253	FSCM91	PSSESATT_1	
2	FTP	ftpuser	.....	.....	pf-sun07	fscm90	PSSESATT_2	
3	DB				PV_ATT_DB_SRV		PSSESATT_3	
4	URL				COMMON_ATT_S_RE			

► Component Subdirectories

Save Notify

Verify Attachment URL IDs

If URL IDs are missing, add those.

See the task "Upgrading File Attachments" for instructions to add URL IDs and for information on File Attachment Architecture.

**Note.** The Attachments URLIDs list is used by the Search Framework to know which attachments will be available to Search Framework.

## Task 4-5: Deploying and Indexing Delivered Search Definitions

This section discusses:

- Deploying Indexes
- Building an Index

### Task 4-5-1: Deploying Indexes

After the indexes are defined, you need to deploy the search definition. You must also deploy the search categories that contain more than one index. Search categories with only one index, which have the same name as the search definitions, are automatically deployed.

**Warning!** The Deploy Search Definitions page also allows you to delete search definitions. Deleted search definitions are not reversible.

The process of deploying and building search definitions defined for Global Search also automatically enables the Keyword Search within Search Pages for the components associated on the Search Definition.

---

**Note.** If your environment does not contain licenses for all products within the Procure to Pay search category you will need to deploy the underlying indexes for the product. However, you do not need to build the indexes. As an alternative, you can customize the Procure to Pay Search Category to remove Search Definitions related to products that are not licensed.

---

To deploy a search definition:

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

In the Search Administration Activity guide, expand the Deploy\Delete Object section to display the Deploy Search Definitions page.

2. Select the check box in the left column.
3. Scroll to the bottom of the Deploy Search Definitions page, and click the Deploy button.
4. Select the Search Categories tab.

Confirm that the category with the same name as the search definition is automatically deployed.

5. Global Search Categories generally contain more than one search definition. As such, they must be deployed independently by following the same steps for a search definition except using the Search Categories tab to deploy. Deploying these search categories can occur before or after individual search definitions are indexed. For example, *EP\_PROCURE\_TO\_PAY* is a Search Category that contains multiple search definitions.

---

**Important!** It must be deployed from the Search Categories tab before it is available in the Global Search bar.

---

PeopleSoft delivers a sample user defined as a *callback user* called PSAPPS for use with Search Framework. A callback user is defined on the Search Framework Search Instance page. Before deploying Search Definitions, verify that the callback user assigned to the Search Instance has been assigned a minimum of the following three roles: Search Query Administrator, Search Server and Peoplesoft User.

---

**Note.** Different roles with equivalent permissions can also be used.

---

Failure to assign proper roles to the callback user will result in errors during search definition deploy and index build.

See *PeopleTools: PeopleSoft Search Technology*, "Administering Search Definitions and Search Categories."

## Task 4-5-2: Building an Index

In this section you use the Schedule Search Index page to build an index.

To build an index:

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

In the Search Administration Activity guide, expand the Schedule Search Index section to display the Schedule Search Index page.

2. Enter the Search Definition name in the Search Definition field.
3. Select Incremental or Full, type of Index Build.
4. Select Language depending on the database.
5. Click Run and enter a Process Scheduler.

See the product documentation for PeopleSoft FSCM: Applications Fundamentals for more information about the Build Search Index page.



## Task 4-6: Upgrading File Attachments

The file attachment architecture is enhanced to provide interfaces for existing legacy attachments for use in definition for PeopleTools Search Framework indexes. In order for attachments to work properly in Search Framework, the definitions for database and FTP or SFTP based file attachments are linked to a Tools URL definition. You can add links in the architecture to define what is required. You can follow the steps listed, to make the system ready for attachment processing in Search Indexes.

If your attachments are all stored within the database this procedure is not required. For any existing non-URL (FTP) based file attachment setup which is crawled, there is a URL definition created in the SES URL Equivalent column on the Administer File Attachment page. The corresponding URLs are automatically set up in PeopleSoft PeopleTools. You need to verify that the file attachments for FSCM are set up.

To set up special URLs for File Attachment Architecture:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments. The Administer File Attachments page appears as shown in the following example:

**Administer File Attachments**

\*Pick Active Server: 3    Add URL Server    Add FTP Server    Add Database Server

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	SES URL Equivalent
1	FTP	ftpuser	.....	.....	10.244.0.253	FSCM91	PSSESATT_1
2	FTP	ftpuser	.....	.....	pf-sun07	fscm90	PSSESATT_2
3	DB				PV_ATT_DB_SRV		PSSESATT_3
4	URL				COMMON_ATT_S_RE		

Component Subdirectories

Save    Notify

Administer File Attachments page

The page displays the definitions that you have created. Make some small change on the page, for example; change the active server or add a space to the end of the login name, and save it. If required, you can revert the change later.

**Note.** The SES URL Equivalent column is populated with the required URL values.

2. Select PeopleTools, Utilities, Administration, URLs, to create PeopleSoft URL definitions.

Verify that in the PeopleSoft URL definitions page, the URLs are created automatically. The following example shows a URL definition page:

**URL Maintenance**

URL Identifier: PSSESATT\_1

\*Description: SES URL from File Attachments

\*URLID: ftp://10.abc.xyz.dfh

Comments: This URL was automatically added from the File Attachments page in Fin/SCM. Do NOT modify this URL from this page. Go to Setup Financials/Supply Chain > Common Definitions > File Attachments > Administer File Attachments to change this URL

[URL Properties](#)

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

URL Maintenance page

These URLs are created with *PSSESATT\_<number>* prefix. The *<number>* corresponds to the ROW number on the URLs listed in Administer File Attachments page.

Verify the username and password are created under the URL Properties hyperlink and the URL path is correct. The following example shows URL Properties window:

**URL Maintenance**

URL Identifier: PSSESATT\_1

\*Description: SES URL from File Attachments

\*URLID: ftp://10.244.0.253/

Comments: This URL was automatically added from NOT modify this URL from this page. Go Common Definitions > File Attachments this URL

[URL Properties](#)

**URL Properties**

**Properties**

Property Name	Property Value		
PASSWORD	.....	+	-
USER	FTPUSER	+	-

**Password Encryption**

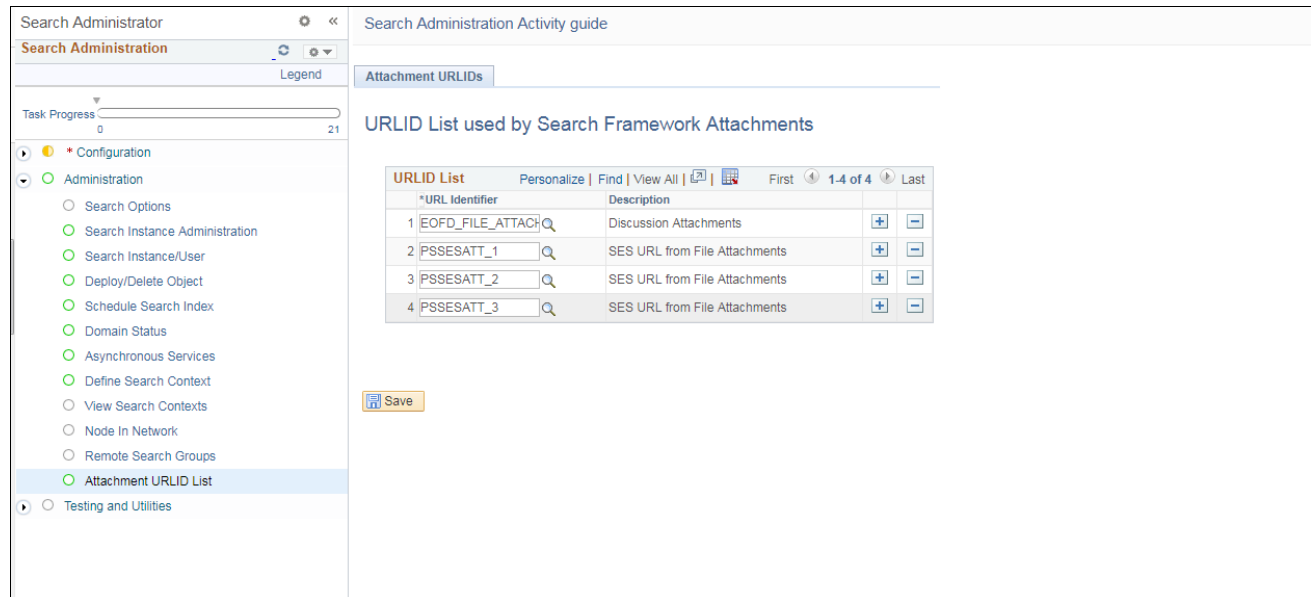
OK Cancel

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

URL Properties window

### 3. Select PeopleTools, Search Framework, Search Admin Activity Guide.

On the Search Administration section, click Administration, and select the Attachment URLID List option to view the Attachments URLIDs page, as shown in the following example:



URLID List Used by Search Framework Attachments page

Add the URLs created in step 2 to this list.

### 4. Click Save.

**Note.** You cannot delete a server after you save the row and quit the component. After you quit, the system assumes that attachments are stored on this server location.

See the product documentation for PeopleTools: Search Technology for more information about the Attachment URL ID list

**Note.** URLs for Search Framework are only created for servers that are *not* already defined as a URL type.

## Chapter 5

# Configuring Materialized Views for Operational Metrics

This chapter discusses:

- Understanding Materialized Views
- Enabling Materialized View
- Maintaining Materialized Views
- Analyzing the Tiles Used in Operation Metrics

## Understanding Materialized Views

---

When building SQL views or query views on an Oracle database, you have the option of implementing a materialized view. In contrast to a standard view, which has only a logical existence, a materialized view has a physical existence, and therefore it can be indexed, analyzed, and managed like other database tables. A materialized view takes the results of complex SELECT statements and saves the datasets to disk. The results are then readily available without the need to run the SQL each time.

Using materialized views can provide significant improvements in performance. The SELECT statements that typically define materialized views often contain sizable tables, complex joins, and summary functions that may take significant time and computing resources to complete. By running the SQL once and saving the results to a table that can be used and reused, a significant savings of CPU and memory consumption can be achieved. Like other PeopleSoft record definitions, materialized views are defined using Application Designer. The data is refreshed on a time period defined in the materialized view record definition.

Conceptually similar indexed views and summary tables are present in Microsoft SQL platform and materialized query tables are available in DB2/zOS platform.

The table below lists the products using materialized views for the Operation Metrics feature:

Product	PI Image	Documentation
Accounts Payable	24	See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Payables.

Product	PI Image	Documentation
Accounts Receivable	24	See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Receivables.
Billing	24	See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Billing.

## Task 5-1: Enabling Materialized View

---

This section discusses:

- Change Properties
- Creating Materialized View in App Designer

---

**Note.** The materialized views are disabled by default.

---

This section discussed the tasks to enable materialized views.

### Task 5-1-1: Change Properties

To change properties:

Navigate to PeopleTools, Utilities, Administration, Materialized Views, Change Properties.

---

**Note.** The Change Properties page allows you to select views to enable or disable materialized views.

---

<a href="#">Favorites ▾</a> <a href="#">Main Menu ▾</a> <a href="#">&gt; PeopleTools ▾</a> <a href="#">&gt; Utilities ▾</a> <a href="#">&gt; Administration ▾</a> <a href="#">&gt; Materialized Views ▾</a> <a href="#">&gt; Change Properties</a>						
Change Properties						
<div> <a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>       </div> <div> <a href="#">First</a>   <a href="#">1-10 of 41</a>   <a href="#">Last</a> </div>						
Enable ?	Disable ?	Materialized View	Status	Object Type	Stop Online Refresh	
1 <input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">APOD_APPCSUM_M</a>	Enabled	Normal View	<input type="checkbox"/>	
2 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOD_DELVCHR_M</a>	Disabled	Normal View	<input type="checkbox"/>	
3 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOD_HLDVCHR_M</a>	Disabled	Normal View	<input type="checkbox"/>	
4 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOD_INVCSUM_M</a>	Disabled	Normal View	<input type="checkbox"/>	
5 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOD_PYMTLAT_M</a>	Disabled	Normal View	<input type="checkbox"/>	
6 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOD_PYMTSUM_M</a>	Disabled	Normal View	<input type="checkbox"/>	
7 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOP_APPCSUM_M</a>	Disabled	Normal View	<input type="checkbox"/>	
8 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOP_APPRVCH_M</a>	Disabled	Normal View	<input type="checkbox"/>	
9 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOP_BSEPYMT_M</a>	Disabled	Normal View	<input type="checkbox"/>	
10 <input type="checkbox"/>	<input type="checkbox"/>	<a href="#">APOP_CANPYMT_M</a>	Disabled	Normal View	<input type="checkbox"/>	

### Change Properties: Materialized View

For more properties on this page,

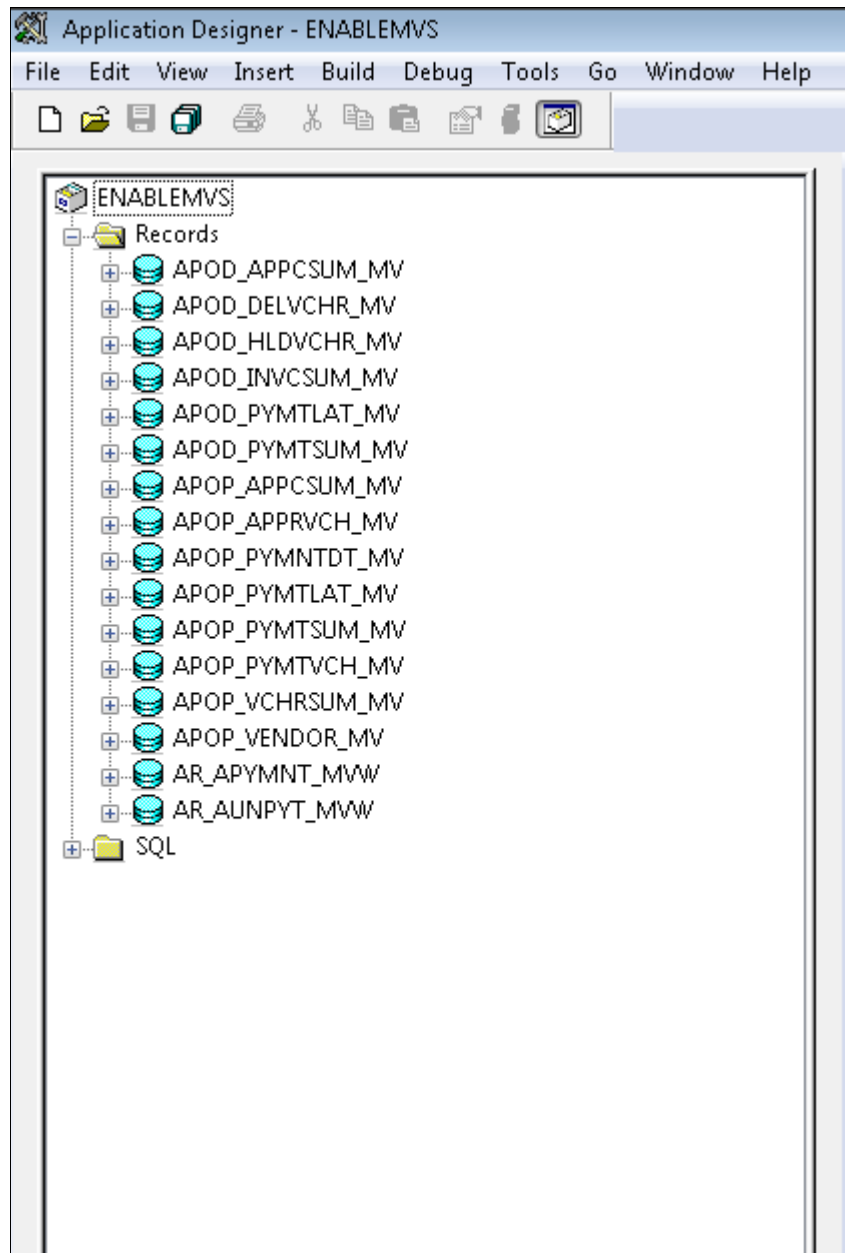
See PeopleSoft PeopleTools: Data Management, "Administering PeopleSoft Databases on Oracle", Using Materialized Views.

For specific information about views that can be converted into Materialized views, by product Receivables, Payables and Billing,

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," Using Operation Metrics.

## Task 5-1-2: Creating Materialized View in App Designer

Once the materialized views are enabled in the above task and saved, access Application Designer and open project ENABLEMVS consisting of all views enabled. Build this project so as to create materialized views.



Application Designer: All Views

## Task 5-2: Maintaining Materialized Views

For ongoing maintenance of materialized views, administrators can use the Materialized View Maintenance page (**PTMAT\_MAINT**). Administrators must have the Materialized View Administrator role and permission list to access this page. Access the Materialized View Maintenance run control page.



Navigate to PeopleTools, Utilities, Administration, Materialized Views, Materialized View Maintenance.

Materialized View Maintenance

Run Control ID SR

Report Manager Process Monitor

Run

☐ Select All Owner

Refresh ?	Materialized View Name	Materialized	Refresh Method	Refresh Mode	Build Mode	Refreshed	Refresh Interval [Seconds]	Automatic Refresh	Set Refresh Interval [Seconds]	Last Refresh Date	Staleness	
1 <input type="checkbox"/>	APOD_APPCSUM_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:49:55.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
2 <input type="checkbox"/>	APOD_DELVCHR_MV	<input type="checkbox"/> No	FAST	ONDEMAND	IMMEDIATE	No		Start/Stop			NOT MATERIALIZED	<input type="button" value="+"/> <input type="button" value="-"/>
3 <input type="checkbox"/>	APOD_HLDVCHR_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:49:57.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
4 <input type="checkbox"/>	APOD_INVCSUM_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:49:52.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
5 <input type="checkbox"/>	APOD_PYMTLAT_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:49:59.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
6 <input type="checkbox"/>	APOD_PYMTSUM_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:50:00.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
7 <input type="checkbox"/>	APOP_APPCSUM_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:49:57.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
8 <input type="checkbox"/>	APOP_APPRVCH_MV	<input checked="" type="checkbox"/> Yes	COMPLETE	ONDEMAND	IMMEDIATE	Yes		Start/Stop		08/15/2017 8:49:57.000000PM	FRESH	<input type="button" value="+"/> <input type="button" value="-"/>
9 <input type="checkbox"/>	APOP_BSEPYMT_MV	<input type="checkbox"/> No	FAST	ONDEMAND	IMMEDIATE	No		Start/Stop			NOT MATERIALIZED	<input type="button" value="+"/> <input type="button" value="-"/>
10 <input type="checkbox"/>	APOP_CANPYMT_MV	<input type="checkbox"/> No	COMPLETE	ONDEMAND	IMMEDIATE	No		Start/Stop			NOT MATERIALIZED	<input type="button" value="+"/> <input type="button" value="-"/>

Materialized View Maintenance

This page contains a grid that is populated with a list of the records in the materialized views table, *PSPTMATVWDEFN*.

See PeopleSoft PeopleTools: Data Management, "Administering PeopleSoft Databases on Oracle", Using Materialized Views.

When you click the Run button, the *PTMATREFVW* Application Engine program executes. It brings up the Process Scheduler Request page. Enter the appropriate server on the page and click the OK button to initiate the process.

Process Scheduler Request

User ID PTDOCLB

Run Control ID MATVW\_RUNCTRL\_01

Server Name

Run Date

Recurrence

Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Refreshes Materialized View	PTMATREFVW	Application Engine	Web	TXT	Distribution

Process Scheduler Request page

## Task 5-3: Analyzing the Tiles Used in Operation Metrics

---

This section discusses:

- Operation Metrics in Payables, Receivables and Billing
- Using Operation Metrics in Payables
- Using Operation Metrics in Receivables
- Using Operation Metrics in Billing

### Operation Metrics in Payables, Receivables and Billing

PeopleSoft enables its users with a method to evaluate and manage operational efficiency within Receivables, Payables, and Billing. Using these performance indicators, users can determine the productivity of the operations as a whole as well as individual performance. Performance can be measured in quantity/amount of vouchers currently pending or processed over a given period of time.

Before accessing data on tiles, user preferences have to be set for all products.

### Task 5-3-1: Using Operation Metrics in Payables

PeopleSoft Payables enables its users with a method to evaluate and manage operational efficiency within the Payables product. Using these indicators, you can determine the productivity of the Payables operations as a whole as well as individual performance.

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Payables.

To use operation metrics in payables:

1. Navigate to Fluid Home, Employee Self Service, Payables Operations Homepage.

---

**Note.** Users must be granted the appropriate permissions to access tiles and pages by assigning a permission list ID.

---

2. On the Credit to Cash Operations page, click Voucher Approval Cycle Time tile to view grid data retrieved from materialized views enabled in previous tasks.

---

**Note.** For all Payables tiles, click on the tile to view grid data retrieved from materialized views.

---

### Task 5-3-2: Using Operation Metrics in Receivables

PeopleSoft Receivables enables its users with a method to evaluate and manage operational efficiency within the PeopleSoft Receivables product. Using these indicators, you can determine the productivity of the Receivables operations as a whole as well as individual performance.

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Receivables.

To use operation metrics in receivables:

1. Navigate to Fluid Home, Employee Self Service, Credit to Cash Operations.

---

**Note.** Users must be granted the appropriate permissions to access tiles and pages by assigning a permission list ID.

---

2. On the Credit to Cash Operations page, click Unapplied Payments tile to view grid data retrieved from materialized views enabled in above tasks.
- 

**Note.** For all Receivables tiles, click on tile to view grid data retrieved from materialized views.

---

### Task 5-3-3: Using Operation Metrics in Billing

Users need a method to evaluate and manage operational efficiency within the PeopleSoft Billing product. Using these indicators, you can determine the productivity of the billing operations as a whole as well as individual performance. The performance can be measured in quantity/amount of invoices currently pending or processed over a given period of time.

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Billing.

To use operation metrics in billing:

1. Navigate to Fluid Home, Employee Self Service, Credit to Cash Operations.
- 

**Note.** Users must be granted the appropriate permissions to access tiles and pages by assigning a permission list ID.

---

2. On the Credit to Cash Operations page, click Invoices by Specialist tile to view grid data retrieved from materialized views enabled in above tasks.



## Chapter 6

# Installing PeopleSoft 9.2 General Ledger

This chapter discusses:

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

## Prerequisites

---

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

The following table lists the setup dependencies for the file import processes in this chapter:

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

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

---

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

To change the URL definition:

1. Select PeopleTools, Utilities, Administrations, URLs.
2. Open GL\_FILE\_IMPORT.
3. Change the URL definition to an FTP server location of your choice.

### See Also

*PeopleTools: PeopleCode Developer's Guide*

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

---

The system requires that you define an environmental variable, PS\_FILEDIR. This variable defines the temporary flat file location on the process scheduler that runs the file import process.

- If you are using a UNIX or DB2 z/OS process scheduler, edit the psconfig.sh file and specify the flat file location in the environment variable PS\_FILEDIR. For example:  

```
PS_FILEDIR="/data1";export PS_FILEDIR
```
- If you are using a Microsoft Windows process scheduler, from your Start menu select Programs, Control Panel, System. Select the Advanced Tab and click Environment Variables. Add or modify the system variable PS\_FILEDIR and specify its value. For example:

```
C:\TEMP
```

---

**Note.** For more technical information on this topic, see the information on `GetFile()` in the *PeopleTools: PeopleCode Language Reference* product documentation, or consult your system administrator.

---

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

---

This is a general reminder for those who run import processes. If the import process enables you to specify Character Set, select the Character Set appropriate to the flat file that you are importing. For example, you may select ISO\_8859-6 for Arabic, and JIS\_X\_0208 or Shift\_JIS for Japanese.

For those who are running the following specific import processes:

```
GL_F2_MAF  
GLFACTSI_MAF  
GL_GOALS_IMP
```

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





## Chapter 7

# Installing and Setting Up Forms Processing for PeopleSoft 9.2 Grants

This chapter discusses:

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

## **Understanding Forms Processing**

---

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

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

- **Grant Application (PHS 398)**  
This is the set of proposal application forms that the National Institutes of Health requires for funding requests. This form set is in the process of being superseded by SF-424 R&R submissions through Grants.gov.
- **Non-Competing Grant Progress Report (PHS 2590)**  
This is an interim progress report that the National Institutes of Health requires recipients to submit for funding. You typically submit this form on an annual basis.

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

---

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

- [http://grants.nih.gov/grants/funding/2590/2590\\_forms.pdf](http://grants.nih.gov/grants/funding/2590/2590_forms.pdf)  
Full Package of 2590 Reports that includes: Grant Progress Report, Form Page 1 - Continued, Detailed Budget for Next Budget Period – Direct Costs Only, Budget Justification/Current Budget Period, Progress Report Summary, Checklist, All Personnel Report, Next Budget Period, Targeted/Planned Enrollment Table,

Inclusion Enrollment Report, Trainee Diversity Report.

- [http://grants.nih.gov/grants/funding/phs398/398\\_forms.pdf](http://grants.nih.gov/grants/funding/phs398/398_forms.pdf)  
Grant Application.
- <http://grants.nih.gov/grants/funding/phs398/biosketch.pdf>  
Biographical Sketch.
- <http://grants.nih.gov/grants/funding/phs398/continuation.pdf>  
Continuation Format Page.
- <http://grants.nih.gov/grants/funding/phs398/fp4.pdf>  
Detailed Budget for Initial Budget Period Direct Costs Only.
- <http://grants.nih.gov/grants/funding/2590/enrollment.pdf>  
Targeted/Planned Enrollment Form.

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

See Setting Up the Forms URL Maintenance Area in PeopleSoft.

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

---

In this section you will set up the Forms URL Maintenance Area.

To set up the Forms URL Maintenance Area:

1. Select PeopleTools, Utilities, Administration, URLs.
2. On the URL search page, search for and select *GM\_FORMS\_LOCATION*.

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

**URL Maintenance**

URL Identifier: GM\_FORMS\_LOCATION

\*Description: Grants PDF templates

\*URLID: C:\FORMS\

Comments:

Save Return to Search Notify Add Update/Display

URL Maintenance page

3. In the URL field, enter the location where you placed the forms.

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

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

In this step you enter the names of the PDF templates. This step is optional.

To enter the PDF template names:

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

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

**Sponsor Forms**

SetID: SHARE      Form ID: PHS398

**Form Detail**      Find | View All      First 1 of 1 Last

\*Effective Date: 01/01/1900      \*Status: Active

\*Description: PHS 398 Grants Application

\*Short Description: PHS 398      File Name: 398\_forms.pdf

Comments: Includes pages AA-KK.

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

Sponsor Forms page

2. Search for and access the pages for the forms in the following table using an appropriate SETID value. Then ensure that the file names listed in the following table are reflected in the File Name field.

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

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

## Task 7-4: Printing the Forms (Optional)

In this step you print the forms. This step is optional.

To print the forms:

1. Select Grants, Proposal, Print Proposal.

The Print Proposal page appears, as shown in the following example:

Print Proposal page

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

The system displays the Process Scheduler Request page.

5. In the Server Name drop-down list box, select the server that you want to use, and then click OK.

## Task 7-5: Viewing Reports

You need Acrobat Reader 5.0 or higher to view reports.

To view reports:

1. Select Reporting Tools, Report Manager, Administration.

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

The screenshot displays the 'Administration' tab of the Report Manager. At the top, there are tabs for 'List', 'Explorer', 'Administration' (selected), and 'Archives'. Below these is a 'View Reports For' section with filters for 'User ID' (VP1), 'Type', 'Last' (1), 'Days', 'Status', 'Folder', and 'Instance' to 'to'. A 'Refresh' button is on the right. The main section is titled 'Report List' and includes a table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The table contains five rows of reports. Below the table are 'Select All' and 'Deselect All' checkboxes, a 'Delete' button, and a 'Save' button. A note states: 'Click the delete button to delete the selected report(s)'. At the bottom, there are navigation links: 'List | Explorer | Administration | Archives'.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	17633	75748	GM_ED1	03/04/2016 8:28:54AM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	17632	75743	Index Search Documents	03/04/2016 1:00:59AM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	17631	75742	BI Publisher empty dir clean	03/04/2016 1:00:59AM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	17630	75741	BI Publisher Archive	03/04/2016 1:00:59AM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	17629	75740	Process Scheduler System Purge	03/04/2016 1:00:42AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Report Manager page- Administration tab

2. On the Report Manager page- Administration tab, locate your process instance (the report description is GM\_ED1).

- Click the Details link in the GM\_EDI row to view a list of the files that relate to the proposal.  
The Report Detail page appears, as shown in the following example:

Report Detail

Report

Report ID 14714

Process Instance 36129

[Message Log](#)

Name GM\_EDI

Process Type Application Engine

Run Status Success

GM\_EDI

Distribution Details

Distribution Node HTTP

Expiration Date 12/22/2014

File List

Name	File Size (bytes)	Datetime Created
<a href="#">AE_GM_EDI_36129.stdout</a>	30,268	12/15/2014 8:02:09.015751PM PST
<a href="#">AE_GM_EDI_36129.trc</a>	188	12/15/2014 8:02:09.015751PM PST
<a href="#">AE_GM_EDI_36129_1215200153.AET</a>	60,664	12/15/2014 8:02:09.015751PM PST
<a href="#">PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.XML</a>	431	12/15/2014 8:02:09.015751PM PST
<a href="#">PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.xfdf</a>	660	12/15/2014 8:02:09.015751PM PST
<a href="#">PI-PRP001_V101_MAIN.XML</a>	7,357	12/15/2014 8:02:09.015751PM PST
<a href="#">PI-PRP001_V101_MAIN.xfdf</a>	10,614	12/15/2014 8:02:09.015751PM PST

Distribute To

Distribution ID Type

\*Distribution ID

User

VP1

+

-

OK

Cancel

Report Detail page

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

## Chapter 8

# Installing PeopleSoft 9.2 Expenses

This chapter discusses:

- Configuring PeopleSoft Integration Broker
- Configuring the Employee Portal Servlet URL

## **Task 8-1: Configuring PeopleSoft Integration Broker**

---

This section discusses:

- Understanding the PeopleSoft Integration Broker Configuration
- Setting Up Gateways
- Activating Queue Definitions
- Setting up Service and Handlers
- Verifying the Message Channel Status

## **Understanding the PeopleSoft Integration Broker Configuration**

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

### **Task 8-1-1: Setting Up Gateways**

To set up the local gateway and load balancer:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and examine the Nodes name
3. Look at the Default Local Node column and search for the "Y" listed row.

---

**Important!** Be sure to make note of your Node name. This information is required while configuring the Gateway Properties.

---

4. Set up a Gateway to begin configuring PeopleSoft Integration Broker.

See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateway for instructions to set up a gateway.

5. Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions to activate the local domain.

## Task 8-1-2: Activating Queue Definitions

You activate the queue definitions.

To activate:

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

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

**Queue Definitions**

Queue Name: EXPENSES

Description: Expenses Message Channel

Comments: This message is used for Approval and Workflow processes to submit and approve transactions.

☒ Archive ☒ Unordered

Queue Status: Run

Owner ID: Expenses

**Operations Assigned to Queue**

Service	Version
EX_APPROVAL	VERSION_1
INITIATE	V1

**Define Partitioning Fields**

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

Buttons: Save, Return to Search, Notify, Add, Update/Display

Queue Definitions page

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

## Task 8-1-3: Setting up Service and Handlers

You set up the service and handlers.

To set up service and handler:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.



- On the Service Operations search page, search for and select the service operation *EX\_APPROVAL*.  
The Service Operations - General page appears, as shown in the following example:

**General** | Handlers | Routings

Service Operation: EX\_APPROVAL  
 Operation Type: Asynchronous - One Way  
 \*Operation Description: Approval Process  
 Operation Comments:   
 Owner ID: Expenses  
 Operation Alias:   
☐ User/Password Required  
 \*Req Verification: None  
 Service Operation Security

**Default Service Operation Version**

\*Version: VERSION\_1  
 Version Description: Approval Process  
 Version Comments:   
☒ Default ☒ Active

**Runtime Schema Validation**

☐ Request Message  
☐ Non-Repudiation

**Routing Status**

Any-to-Local	Exists
Local-to-Local	Exists
Local-to-Atom	Does not exist.

**Routing Actions Upon Save**

☐ Regenerate Any-to-Local  
☐ Regenerate Local-to-Local  
 Warning: Regenerating sets all routing field values to their initial state.

**Message Information**

Type: Request  
 Message.Version: EX\_APPROVAL.VERSION\_1 [View Message](#)  
 \*Queue Name: EXPENSES [View Queue](#) [Add New Queue](#)

[Save](#) [Return to Service](#) [Add Version](#)

General | Handlers | Routings

Service Operations-General page

- On the General page, in the Default Service Operation Version group box, select the Active check box.
- Click Save.

5. Select the **Handlers** tab to access the Handlers page, as shown in the following example:

Service Operation EX\_APPROVAL  
Default Version VERSION\_1  
Operation Type Asynchronous - One Way

Handlers						Personalize	Find	View All	First	1 of 1	Last
*Name	*Type	Sequence	*Implementation	*Status							
1 EXApproval	On Notify		Application Class	Active	Details	+	-				

Service Operations - Handlers page

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

Service Operation EX\_APPROVAL  
Default Version VERSION\_1  
Routing Name

Routing Definitions								Personalize	Find	View All	First	1-2 of 2	Last	
Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results						
<input checked="" type="checkbox"/>	EX_APPROVAL	VERSION_1	Asynch	~~ANY~~	EP920MST	Inbound	Active							
<input type="checkbox"/>	EX_APPROVAL_LCL	VERSION_1	Asynch	EP920MST	EP920MST	Local	Active							

[Return to Service](#)

General | Handlers | Routings

Service Operation-Routings page

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

## Task 8-1-4: Verifying the Message Channel Status

Then, verify the message channel status.

To run the message channel:

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

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

Queue Name	Status	
EXPENSES	Running	Pause
FO_APP_HIRE	Running	Pause
FO_ASSIGNMENTS	Running	Pause
FO_MASS_CHANGES	Running	Pause

Queue Status page

2. On the Queue Status page, in the Status column, verify that the status for queue name EXPENSES is *Running*. If the status is *Paused*, click the Run button next Status column in the EXPENSES row.

## Task 8-2: Configuring the Employee Portal Servlet URL

To configure the URL for the Employee Portal Servlet (EMP\_SERVLET):

1. Select PeopleTools, Utilities, Administration, URLs.

2. On the URL search page, search for and select the URL identifier EMP\_SERVLET.

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

**URL Maintenance**

URL Identifier: EMP\_SERVLET

\*Description: Employee portal servlet

\*URLID: http://xyz.us.oracle.com:8000/abc/ep

Comments: Example: http://servername/psp/employeeportaldomain/

**URL Properties**

Save Return to Search Notify Add Update/Display

URL Maintenance page

3. On the URL Maintenance page, in the URLID field, enter the URL to your machine's server name and append /psp/<employeeportaldomain>/

For <employeeportaldomain> use the site name of your employee portal domain. For example, if the web server machine name is serverx, and the employee portal domain is empdb910, the URLID is http://serverx/psp/empdb910.

4. Click Save.

## Chapter 9

# Installing PeopleSoft 9.2 Pay/Bill Management

This chapter discusses:

- Understanding PeopleSoft 9.2 Pay/Bill Management
- Prerequisites
- Verifying Integration Points
- Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM

## Understanding PeopleSoft 9.2 Pay/Bill Management

---

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

See *PeopleSoft FSCM: Pay/Bill Management*

See *PeopleTools: Integration Broker Administration*, for your release.

## Prerequisites

---

You must install PeopleSoft Pay/Bill Management 9.2 for PeopleSoft HRMS before you can fully utilize the PeopleSoft Pay/Bill Management application. The complete installation instructions for PeopleSoft Pay/Bill Management for PeopleSoft HRMS are available on My Oracle Support.

See *PeopleSoft Human Capital Management Installation*

---

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

---

## Task 9-1: Verifying Integration Points

---

This section discusses:

- Understanding Integration Points Verification
- Setting Up Node Definitions for Single Signon
- Setting Up Portal Nodes

- Setting Up Single Signon
- Activating Queue Definitions
- Setting Up the PeopleSoft System-Delivered Service Operations

## Understanding Integration Points Verification

In this task, you verify integration points for the PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 and PeopleSoft Human Capital Management (HCM) 9.2 environments. Each environment contains both PSFT\_EP and PSFT\_HR message nodes. You must set both message nodes in both the PeopleSoft FSCM 9.2 and PeopleSoft HCM 9.2 environments.

PSFT\_EP is the default local node in PeopleSoft FSCM, but PSFT\_HR also exists in PeopleSoft FSCM. This section details how to set both nodes in the PeopleSoft FSCM environment.

PSFT\_HR is the default local node for PeopleSoft HCM, but PSFT\_EP also exists in PeopleSoft HCM. This section details how to set both nodes in the PeopleSoft HCM environment.

---

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

---

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

The PeopleSoft FSCM and PeopleSoft HCM environments contain both message nodes PSFT\_EP and PSFT\_HR. You must set both message nodes in both environments.

PSFT\_EP is the default local node in PeopleSoft FSCM. PSFT\_HR also exists in PeopleSoft FSCM and must be set.

PSFT\_HR is the default local node in PeopleSoft HCM. PSFT\_EP also exists in PeopleSoft HCM and must be set.

See the "Appendix: Applying Common Installation Instructions," Setting Up Message Node Definitions for instructions to set up node definitions.

### Task 9-1-2: Setting Up Portal Nodes

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

See the "Appendix: Applying Common Installation Instructions," Setting Up Portal Nodes for instructions to set up portal nodes.

### Task 9-1-3: Setting Up Single Signon

#### Setting Up Single Signon in PeopleSoft FSCM

To verify Single Signon in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Security, Security Objects, Single Signon. The Single Signon page appears, as shown in the following example:

**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	+	-
PSFT_HR	PS HCM - Human Capital Mgt		+	-

Save Refresh

Single Signon page

2. On the Single Signon page, in the *Trust Authentication Tokens issued by these Nodes* group box, specify the message nodes PSFT\_EP and PSFT\_HR, as shown in the preceding example.
3. Click Save.

## Setting Up Single Signon in PeopleSoft HCM

To verify Single Signon in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Security, Security Objects, Single Signon.
2. On the Single Signon page, in the *Trust Authentication Tokens issued by these Nodes* group box, specify the message nodes PSFT\_EP and PSFT\_HR, as shown in the preceding example.
3. Click Save.

Next, set up the Integration Gateways.

See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions.

Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

## Task 9-1-4: Activating Queue Definitions

### Understanding Queue Definition Activation

The following queue definitions must be active for PeopleSoft Pay/Bill Management:

ACTION\_REASON  
 ACTUAL\_TIME  
 COMPETENCY  
 CUSTOMER

ELAPSED\_TIME  
ENTERPRISE\_SETUP  
ESTIMATED\_TIME  
FO\_APP\_HIRE  
FO\_ASSIGNMENTS  
FO\_MASS\_CHANGES  
FO\_SETUP  
FO\_SYNC  
GL\_SETUP  
HR\_SETUP  
MARKET\_RATES  
MARKET\_RATE\_LOAD  
PAYGROUP\_SETUP  
PERSON\_DATA  
PERSON\_SETUP  
PROJECTS\_SETUP  
RATING\_MODEL  
TIME\_AND\_LABOR\_SETUP

## Activating Queue Definitions in PeopleSoft FSCM

To activate queue definitions in the PeopleSoft FSCM environment:



1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.

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

## Queues

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Search by: Queue Name begins with

[Search](#) [Advanced Search](#)

### Search Results

View All First 1-100 of 268 Last

Queue Name
<a href="#">ACTION_REASON</a>
<a href="#">ACTUAL_TIME</a>
<a href="#">ADVANCED_SHIPPING_NOTICE</a>
<a href="#">AIRLINE_TICKET_LOAD</a>
<a href="#">AM_SETUP</a>
<a href="#">AP_DCM_PROCESS</a>

Queue Search Page

- On the Queues search page, search for and select the queue name *ACTION\_REASON*.

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

**Queue Definitions**

Queue Name: ACTION\_REASON  
 Description: Action Reason Setup  
 Comments: Action Reason Setup

☒ Archive ☐ Unordered

Queue Status: Run  
 Owner ID: HR Core Objects

**Operations Assigned to Queue**

Service Operation	Version
ACTION_REASON_FULLSYNC	VERSION_1
ACTION_REASON_SYNC	VERSION_1

**Define Partitioning Fields**

Include	Field	Alias Name
<input type="checkbox"/>	ACTION	
<input type="checkbox"/>	ACTION_REASON	
<input type="checkbox"/>	EFFDT	
<input type="checkbox"/>	EFF_STATUS	
<input type="checkbox"/>	DESCR	
<input type="checkbox"/>	DESCRSHORT	
<input type="checkbox"/>	BEN_STATUS	
<input type="checkbox"/>	BAS_ACTION	
<input type="checkbox"/>	COBRA_ACTION	
<input type="checkbox"/>	ROE_REASON	

Buttons: Save, Add Field, Return to Search, Notify, Add, Update/Display

Queue Definitions page

- On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
- Click Save.
- Repeat the steps above for the remaining Queues listed in the beginning of this task.

## Activating Queue Definitions in PeopleSoft HCM

To activate queue definitions in the PeopleSoft HCM environment:

- In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.
- On the Queues search page, search for and select the queue name *ACTION\_REASON*.
- On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
- Click Save.
- Repeat the steps above for the remaining Queues listed in the beginning of this task.

## **Task 9-1-5: Setting Up the PeopleSoft System-Delivered Service Operations**

The PeopleSoft system-delivered service operations are meant to keep tables in sync between PeopleSoft FSCM 9.2 and PeopleSoft HCM 9.2. You must make decisions about how to implement the integration. These decisions determine your tasks in activating handlers and routings.

See *PeopleSoft FSCM: PeopleSoft Pay/Bill Management*, "Using Enterprise Integration Points."

## **Task 9-2: Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM**

---

This section discusses:

- Verifying the Installation Table for PeopleSoft HCM
- Verifying the Installation Table for PeopleSoft FSCM

### **Task 9-2-1: Verifying the Installation Table for PeopleSoft HCM**

In this step, you verify the selection of the Pay/Bill Management and Project Costing installation options in the Installation table.

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

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

**Products** | HCM Options | Product Specific | Country Specific | Last ID Assigned | Third Party/System | Alternate Character

**Installed Products**

<input checked="" type="checkbox"/> Human Resources	<input type="checkbox"/> Education and Government	<input type="checkbox"/> Enterprise Learning Management
<input checked="" type="checkbox"/> Benefits Administration	<input type="checkbox"/> Federal	
<input checked="" type="checkbox"/> Succession Planning	<input type="checkbox"/> Military	<input checked="" type="checkbox"/> Candidate Gateway
	<input type="checkbox"/> French Public Sector	<input checked="" type="checkbox"/> Talent Acquisition Management
<input checked="" type="checkbox"/> Pension Administration	<input type="checkbox"/> German Public Sector	
<input checked="" type="checkbox"/> Time and Labor		<input checked="" type="checkbox"/> eBenefits
<input checked="" type="checkbox"/> Labor Rules and Monitoring	<input checked="" type="checkbox"/> Currency Conversion Utility	<input checked="" type="checkbox"/> eDevelopment
	<input checked="" type="checkbox"/> Pay/Bill Management	<input checked="" type="checkbox"/> eCompensation
<input checked="" type="checkbox"/> Absence Management	<input checked="" type="checkbox"/> Directory Interface	<input checked="" type="checkbox"/> eCompensation Manager
<input checked="" type="checkbox"/> Payroll for North America		<input checked="" type="checkbox"/> ePay
<input checked="" type="checkbox"/> Payroll Interface	<input checked="" type="checkbox"/> HRMS Portal Pack	<input checked="" type="checkbox"/> ePerformance
<input checked="" type="checkbox"/> Global Payroll Core	<input type="checkbox"/> General Ledger	<input checked="" type="checkbox"/> eProfile
Installed GP Countries	<input type="checkbox"/> Project Costing	<input checked="" type="checkbox"/> eProfile Manager
Installed Integration Products	<input type="checkbox"/> Receivables	
	<input checked="" type="checkbox"/> Student Administration	

Save Notify

Products | HCM Options | Product Specific | Country Specific | Last ID Assigned | Third Party/System | Alternate Character

PeopleSoft HCM Installation Table - Products: Installed Products page

2. On the Products page, in the Installed Products group box, verify that Pay/Bill Management and Project Costing are selected.  
If they are not selected then select them.
3. Click Save.

## Task 9-2-2: Verifying the Installation Table for PeopleSoft FSCM

In this step, you verify the selection of the Pay/Bill Management for Contracts installation option in the Installation table.

1. In PeopleSoft FSCM, select Set Up Financials/Supply Chain, Install, Installation Options.

- On the Installation Options page, click the Contracts link to access the Contracts page, as shown in the following example:

Installation Options | **Contracts**

**Processing Options**

Currency Conversion Date Accounting Date

Processing Order Template

**Limit Options**

☒ Reduce by retainage first ☒ Summ. Limit for Govt Contracts

☒ Apply retainage upon release ☒ Split to Match Limit Exactly

**Other Installed Options**

☐ Pay/Bill Management Installed ☒ Federal Reimbursable Agreement

☐ Defer Line Attributes to Batch ☐ Agreement Amount Restricted

**Separate Options**

☐ Separate Fixed Billing and Revenue ☒ Separate As Incurred Billing and Revenue

**Revenue Forecast**

Calendar SetID SHARE

Detail Calendar MN

Summary Calendar Q2

**Accounting Definition Name**

Acctg Definition SetID SHARE

Acctg Definition Fix Fee CADEFN

Acctg Definition Projects CAPCDEFN

Acctg Definition TBP CATXNDEFN

Save Notify Refresh

Installation Options | Contracts

PeopleSoft FSCM Installation Options - Contracts page

- On the Contracts page, verify that Pay/Bill Management Installed is selected. If it is not selected then select it.
- Click Save.



## Chapter 10

# Installing PeopleSoft 9.2 ESA and FSCM Portal Packs

This chapter discusses:

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

### Task 10-1: Granting Access to Navigation Pages

---

To access the navigation pages, you must grant all users security to the Navigation Page IScripts. Using PeopleSoft Data Mover, run the EOPP\_ADD\_ROLE.DMS script that is in *PS\_APP\_HOME*\scripts.

**Note.** When you create a new user ID, you should add the EOPP\_USER role to the new user ID.

---

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

---

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

To update the homepage personalization permission list, use PeopleSoft Data Mover to run the PORTAL\_HP\_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL\_ADD\_ROLE.DMS script. You can find both scripts in <PS\_APP\_HOME>\scripts.

**Note.** You should grant the PAPP\_USER role to all new user IDs for access to the homepage personalization. After running this script, you should manually remove the role PAPP\_USER from any GUEST User ID because the GUEST user should not be personalizing the common homepage.

---

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

---

To enable pagelet creation and viewing using the Enterprise Components Portal Utilities, you can use PeopleSoft Data Mover to run the EOPP\_PORTAL\_PACK.DMS script in <PS\_APP\_HOME>\scripts.

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

---





## Chapter 11

# Integrating PeopleSoft 9.2 Project Costing and Program Management with Microsoft Project 2007, 2010, or 2013

This chapter discusses:

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

## **Understanding the PeopleSoft-Microsoft Project Integration**

---

The PeopleSoft-Microsoft Project Integrator is required if you are integrating PeopleSoft Project Costing or PeopleSoft Program Management with Microsoft Project 2007 (Microsoft Windows XP), Microsoft Project 2010, or Microsoft Project 2013. PeopleSoft-Microsoft Project Integrator must be installed and running on each file server that you plan to use as a point of integration.

---

**Note.** PeopleSoft-Microsoft Project Integrators must be installed on the machine that is configured with Microsoft Project 2007, Microsoft Project 2010, or Microsoft Project 2013. It is important that this machine is not used for any other purpose. The Integrator supports Windows Terminal Server which means that one machine can be used to run multiple Integrators.

---

---

**Note.** The supported browser for integrating PeopleSoft Project Costing with Microsoft Project is Internet Explorer (IE).

---

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

---

To install the project integrator:

1. Create a directory, referred to here as *<MSP\_HOME>*, for the PeopleSoft-Microsoft Project Integrator on the Microsoft Windows machine that you dedicate as the Microsoft Project Integrator.  
For example: C:\MSP\.
2. From your file server, copy the files in *<PS\_APP\_HOME>/src/vb/msp* to the *<MSP\_HOME>* directory.
3. To register any missing ActiveX controls in the Microsoft Windows machine that you dedicate as the Microsoft Project Integrator, check the Windows system installation directory (referred to here as *<WINDOWS\_INST>*), for example C:\WINNT\SYSTEM32 or C:\WINDOWS\SYSTEM32, for the following OCX files:
  - Richtx32.ocx

- TABCTL32.OCX
  - MSINET.OCX
4. If any of these files are missing, do the following:
- a. Copy the three files from <PS\_APP\_HOME>/src/vb/msp to <WINDOWS\_INST>.
  - b. Copy the file regmsp.bat from <PS\_APP\_HOME>/src/vb/msp to <WINDOWS\_INST>.
  - c. Run <WINDOWS\_INST>\regmsp.bat to register the OCXs.

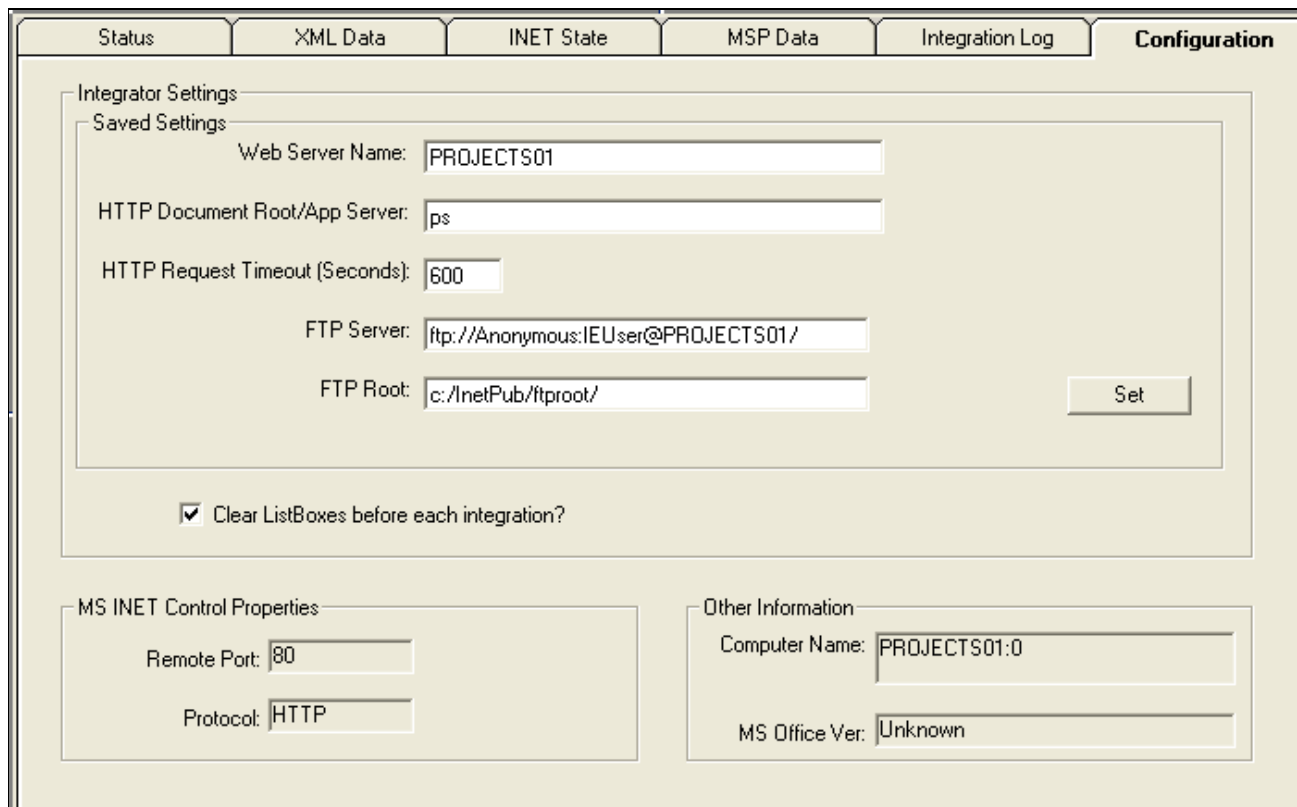
For example:

C:\WINNT\system32\regmsp.bat.

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

After the PeopleSoft-Microsoft Project Integrator begins running, you must configure it for your environment, as follows:

1. Launch <MSP\_HOME>\PC\_MSP2.EXE to start the Microsoft Project Integrator application.
2. Select the Configuration tab, as shown in the following example:



PeopleSoft-Microsoft Project Integrator - Configuration tab

3. Enter the following values:
  - In the Web Server Name field, enter the name of your web server.
  - In the HTTP Document Root/App Server field, enter the name of your application server.

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

For example:

`http://abc12345.us.oracle.com:4321/psp/e910p21x/?cmd=login`

In the preceding example, *abc12345.us.oracle.com:4321* is entered as the Web Server Name and *e910p21x* is entered as the HTTP Document Root/App Server.

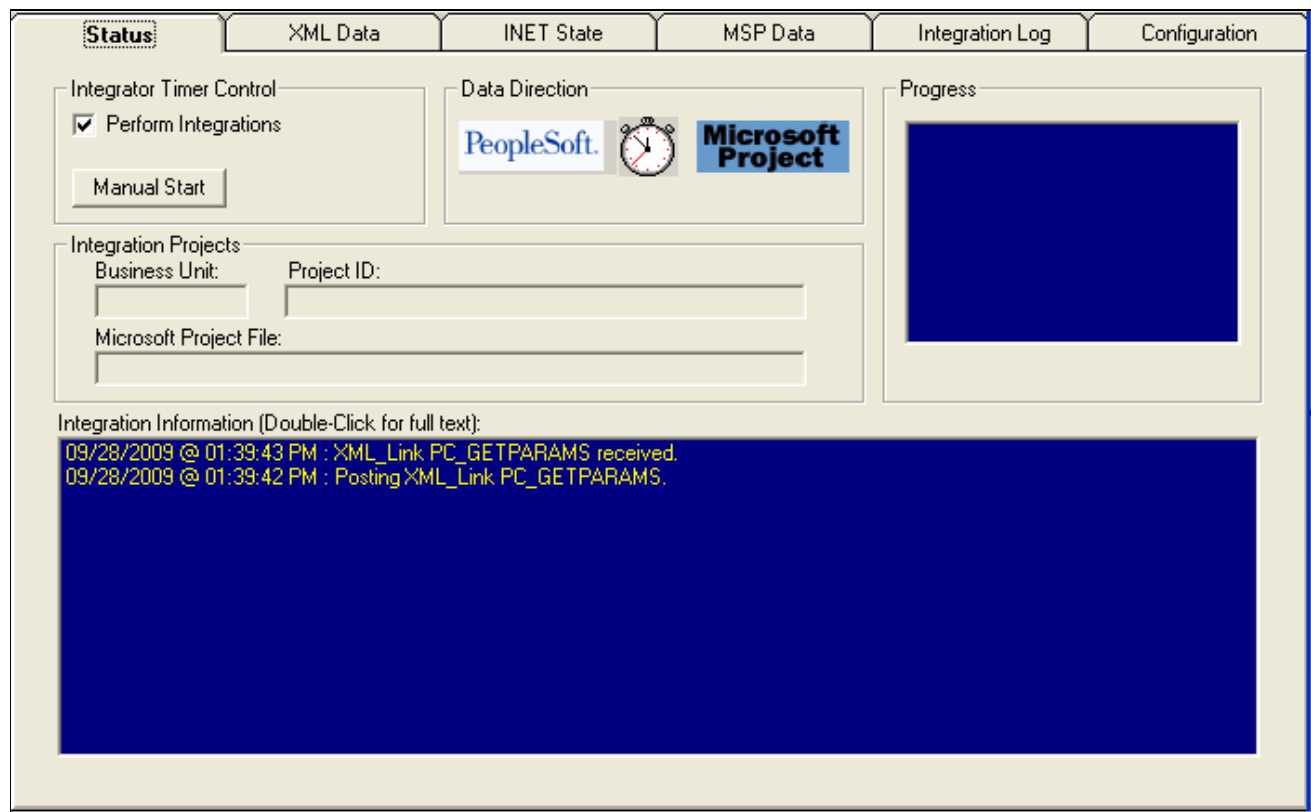
- In the FTP Server field, enter the FTP server that this integrator uses to direct the application server to send the .mpp files for integration.
  - In the FTP Root field, enter the Windows file path to the root location of the FTP server. This is the file path that Microsoft Project uses to find the .mpp files to integrate.
4. You can verify that the Microsoft Project Integrator is running successfully when you see a message such as this:

Example of Integration Information message when working properly:

01/07/2011@02:43:12PM:XML\_Link PC\_GETPARAMS received.

01/07/2011@02:43:12PM:PostingXML\_Link PC\_GETPARAMS.

This example shows the message in the Integration Information section of the Status page:



Microsoft Project Integrator page: Status tab showing Integration Information message

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

Do the following:

- Open a browser and run the following URL:

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

For example: <http://projects01.peoplesoft.com/xmllink/ps/>

- Then run the integrator again.

To launch the project integrator upon start up, create a shortcut to PC\_MSP2.EXE in the server's Startup folder to ensure it initiates upon start up.

## Chapter 12

# Defining an FTP Server for File Attachments in PeopleSoft 9.2 Project Costing

This chapter discusses:

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

## Understanding File Attachment Storage

---

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

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

---

To store file attachments on the database:

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

---

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

---

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

---

To store file attachments on a file server:

1. Verify that your FTP server has adequate disk storage to store the project and activity documents.
2. Select PeopleTools, Utilities, Administration, URLs.
3. On the URLs search page, search for and select the URL `PC_PROJECTS_DOC_ATTACHMENT`.

---

**Note.** PeopleSoft Project Costing delivers this URL.

---

4. On the URL Maintenance page, enter the URL path to the designated FTP server in the following format:

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

---

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

---

- In the User ID field, enter the user ID of the user account under which all users connect to the FTP server to add, update, view and delete documents.
- In the Password field, enter the password that is associated with the user account under which all users connect to the FTP server.
- In the Machine Name field, enter the machine name by which you physically identify the FTP server on the network.

If you create an optional directory for document storage on the server, include the directory name when you cite the path. You can also store attachments in the root directory of the FTP server.

5. Click Save.
6. On the Installation Options - Project Costing page, in the File Attachment Options section, select the *File Server* option and enter the home directory where you store the attachment files.
7. Click Save.

See the product documentation for PeopleTools: System and Server Administration, "Using PeopleTools Utilities," for more information on the PeopleSoft URL Maintenance page.

See the product documentation for PeopleSoft FSCM: Application Fundamentals, "Setting Installation Options for PeopleSoft Applications," for more information on the PeopleSoft Installation Options - Project Costing page.

## Chapter 13

# Setting Up PeopleSoft 9.2 Staffing Front Office

This chapter discusses:

- Setting Up Document Attachments
- Setting Up the PeopleSoft Search Framework
- Integrating Resume Parsing for PeopleSoft Staffing Front Office

## Task 13-1: Setting Up Document Attachments

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This section discusses:

- Understanding Document Attachments
- Setting Up the File Attachment Server

### Understanding Document Attachments

PeopleSoft Staffing Front Office 9.2 uses the standard file attachments functionality. Many PeopleSoft products and components use this functionality.

---

**Note.** Oracle supports PeopleSoft Staffing Front Office only on Microsoft SQL Server, Oracle, and DB2 LUW.

---

If you are planning to use file attachments for Applicants, Employees, Orders, Assignments, Customers, or Contacts, then you need to set up a File Attachments server. PeopleSoft Staffing Front Office supports any of the following file attachment server types:

- FTP (file transfer protocol server)
- DB (database server)
- URL (universal resource locator server)

### Task 13-1-1: Setting Up the File Attachment Server

The system stores and retrieves Attachments to PeopleSoft Staffing Front Office Orders and Assignments from the server locations that you define on the Administer File Attachments page. System administrators can configure one or more servers to store attachments, set up new servers, and identify the active server. Administrators can add or modify the FTP root folder for FTP servers. These servers can be FTP, URLs, or Database servers. This section describes how to configure a Database server.

**Note.** If you want to configure an FTP or URL server, you can find more information for setting up File Attachments in FSCM architecture in *PeopleSoft FSCM: Application Fundamentals*.

To set up a file attachment server for PeopleSoft Staffing Front Office:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.

The Administer File Attachments page appears, as shown in this example:

**Administer File Attachments**

\*Pick Active Server 3    Add URL Server    Add FTP Server    Add Database Server

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	SES URL Equivalent
1	FTP	ftpuser	.....	.....	10.244.0.253	FSCM91	PSSESATT_1
2	FTP	ftpuser	.....	.....	pf-sun07	fscm90	PSSESATT_2
3	DB				PV_ATT_DB_SRV		PSSESATT_3
4	URL				COMMON_ATT_S_RE		

▶ Component Subdirectories

Save    Notify

Administer File Attachments page

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

You can switch the active server at any time. All previously created attachments are still retrieved from the server where they were originally stored. The attachments keep a reference to the original server.

3. Click the Add Database Server button to insert a new row into the grid to define a new Database server for attachments.

The new row includes the following:

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

After you save the row and exit the component, you cannot change the server type.

4. In the Server/Record Name/URL Id field, accept the default record name, PV\_ATT\_DB\_SRV.
5. Click Save.

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

**Note.** The Component Subdirectories group box and fields are *not* applicable for PeopleSoft Staffing Front Office attachments.



## **Task 13-2: Setting Up the PeopleSoft Search Framework**

---

PeopleSoft Staffing Front Office 9.2 uses the PeopleSoft Search Framework to address its search needs. The search functionality is common between PeopleSoft Staffing and Resource Management.

You can deploy the Search Definitions in PeopleTools, Search Framework, Administration, Deploy/Delete Object.

See the product documentation for PeopleTools: PeopleSoft Search Technology, "Understanding PeopleSoft Search Framework," for more information about setting up PeopleSoft Search Framework.

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

---

This section discusses:

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

### **Understanding Resume Parsing for PeopleSoft Staffing Front Office**

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

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

### **Task 13-3-1: Setting Up Staffing Installation Options for Resume Parsing**

To set up PeopleSoft SFO installation options to use resume parsing:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.

2. Select the Staffing tab to access the Staffing Installation page, as shown in the following example:

Installation Options **Staffing**

### Staffing Installation

Country  United States

Last Emplid Used

Last History ID Assigned

Last Order ID Used

Last Mass Change Run

Role Name

PeopleSoft Domain

Map Selection

System Email Address

Email Event for History Log

Default Task Category

Installation Options - Staffing Installation page showing the PeopleSoft Domain

3. On the Staffing Installation page, in the PeopleSoft Domain field, enter or browse to select the PeopleSoft domain.  
For example: *PSFT*.

4. On the Staffing Installation page, in the 3rd Party Integrations group box, select the Resume Parsing Provider check box, as shown in the following example:

The screenshot shows the 'Staffing Installation' page with several sections. The 'Additional Job Options' section has checkboxes for 'Hourly Employees' and 'Salaried Employees', both of which are checked. The 'Recruiting Funnel Options' section has input fields for 'Express Assignment Event' (containing 'ASGN') and 'Hire Event' (containing 'HIRE'). The 'Organization Structure' section has input fields for 'Organization Unit Field' (containing 'DEPTID'), 'Organization Unit Record' (containing 'DEPT\_TBL'), 'Organization Unit Tree' (containing 'CONSULTING'), and 'Employee - Organization Record' (containing 'FO\_ORGEMPLBR'). The 'Apply Online' section has input fields for 'Department SetID' (containing 'SHARE'), 'Employee Self Service Deptid' (containing '10000'), and 'Default Attachment Type' (containing 'REFLT'). There are also dropdown menus for 'Candidate Registration' (set to 'Optional Registration') and 'After Update Status' (set to 'Applicant Pending'). At the bottom, there are buttons for 'Save', 'Notify', and 'Refresh'.

Installation Options - Staffing Installation page showing the Resume Parsing Provider

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

**Note.** After you complete your basic PeopleSoft FSCM 9.2 and PeopleSoft SFO installation, you can complete the remaining Staffing Installation options and fields on this page using the implementation instructions in the PeopleSoft 9.2 Staffing Front Office documentation.

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

This section discusses:

- (Optional) Adding the Proxy Settings
- Encrypting the Password for the secureKeystore

### (Optional) Adding the Proxy Settings

Before adding the proxy settings, you must activate the local domain and set up integration gateways.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions to activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions to set up integration gateway.

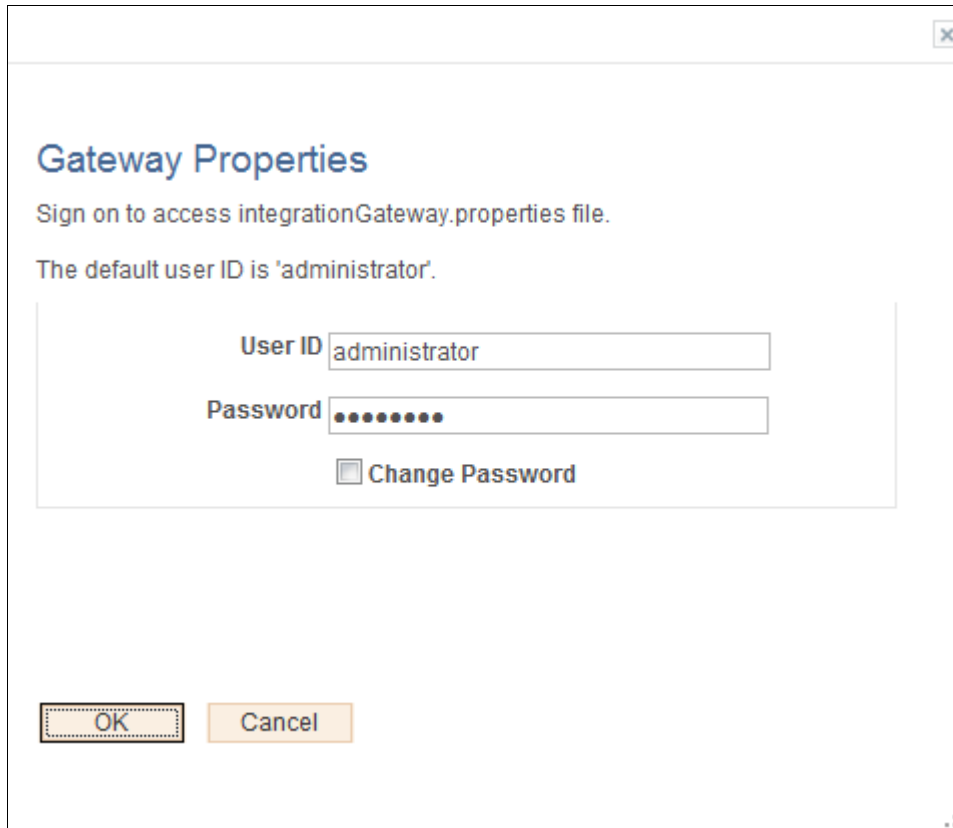
If your environment is behind a proxy server, perform these steps to add the proxy settings to the gateway. Adding proxy settings is optional, based on your server configuration. If you have no proxy settings to add, you can skip these steps and proceed to the next task.

To add proxy settings to the gateway:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways.

2. Click the Gateway Setup Properties link to access the Gateway Properties.

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



**Gateway Properties**

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

☐ Change Password

Gateway Properties signon page

3. On the Gateway Properties signon page, enter the User ID, administrator in the preceding example, and Password for the Integration Gateway.
- If you do not know the User ID and Password of the Integration Gateway, contact your system administrator.

## 4. Click OK.

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

PeopleSoft Node Configuration

URL:

**Gateway Default App. Server**

App Server URL:

User ID:

Password:

Tools Release:

Domain Password:

Virtual Server Node:

**PeopleSoft Nodes**

Personalize | Find | View All | First 1-2 of 2 Last

Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	//localhost:9000	VP1	...	8.56-901-R1	...	Ping Node + -
PSFT_HR	//localhost:9000	PS	...	8.56-901-R1	...	Ping Node + -

Advanced Properties Page

OK Cancel Save

PeopleSoft Node Configuration page

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

IB Gateway Properties

### Gateway Properties

URL `http://localhost/PSIGW/PeopleSoftListeningConnector`

#### Gateway Properties

```
## Proxy webserver section
#

# If the Integration Gateway is behind a proxy server, uncomment out the two lines
# containing variables below
# set "Proxy Host=" to the domain name of the proxy server (proxy.peoplesoft.com)
# set "Proxy Port=" to the port number of the proxy server (80)
#ig.proxyHost=proxy.corp.com
#ig.proxyPort=80

# nonProxyHosts lists hosts that should be accessed directly, instead of through the
# proxy server.
#ig.nonProxyHosts=

#
```

#### ▶ Password Encryption

OK Cancel

Gateways Properties page

## Encrypting the Password for the secureKeystore

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

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

**IB Gateway Properties**

**Gateway Properties**

URL `http://localhost/PSIGW/PeopleSoftListeningConnector`

**Gateway Properties**

```
secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==
#
## End of Integration Gateway CERTIFICATE Section
#
#
##Transformation Section Example :
#
ig.DefaultServer.LocalNode=QE_LOCAL
#ig.isGatewayTransformationEnabled=FALSE
#ig.transforms=1
```

**▼ Password Encryption**

**Password**

**Confirm Password**

**Encrypt**      **Encrypted Password** `{V1.1}7m4OtVwXFNyLc1j6pZG69Q==`

**OK**      **Cancel**

Gateway Properties page showing the Password Encryption utility

2. In the Password Encryption section, add the secure file keystore as follows:
  - In the Password field, enter *password*.
  - In the Confirm Password field, enter *password*.
  - Click the Encrypt button to encrypt the password.
3. After you encrypt the password, copy and paste it from the Encrypted Password field to the Gateway Properties (paste it after `secureFileKeystorePasswd=`).  
 For example: `secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==`
4. Click OK.

## Task 13-3-3: Setting Up Mapping

This section discusses:

- Understanding the Mapping Setup
- Configuring Static or Dynamic Mapping

### Understanding the Mapping Setup

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

The two types of mapping are described as follows:

- **Dynamic:** Use for XREF tables that change occasionally (add/update/delete).  
Use to map fields to values that will change occasionally and will need more maintenance in the future (such as degree codes, major codes, and so on).
- **Static:** Use for system codes (such as gender) that change rarely but that contain a different set of values for use by candidates.

Use to map fields (such as status fields, email type, and so on) whose values will change little in the future.

The following table lists several maps along with their type, elements, PSFT domain, and HRXML domain. You should create mappings for the items in the table according to the examples in the table for both mapping types:

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



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

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

## Configuring Static or Dynamic Mapping

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

To configure either static or dynamic mapping:

1. Select Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps.
2. Search and select a map.
3. On the Elements page, specify the field names, types, and lengths for all of the domains.

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

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

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

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

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

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

5. Repeat these steps for each map.

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

The screenshot displays the 'Elements' tab in the PeopleSoft interface. At the top, there are tabs for 'Elements' and 'Domains'. Below these, the 'Map Name' is 'PhoneTypeDVM' and the 'Type' is 'Static'. A text field for '\*Description' contains 'Phone Type DVM', and there is a 'Comments' text area. To the right of the description field is an 'Options' link. Below the description is a table titled 'Assign Elements to Maps' with columns: Order, \*Element Name, \*Data Type, Length, Required, and two empty columns with '+' and '-' icons. The table contains three rows of data:

Order	*Element Name	*Data Type	Length	Required		
1	UniqueGUID	String	36	<input checked="" type="checkbox"/>	+	-
2	PHONE_TYPE	String	4	<input checked="" type="checkbox"/>	+	-
3	PHONE_TP	String	20	<input checked="" type="checkbox"/>	+	-

Below the table are buttons for 'Export' and 'Delete'. At the bottom left are 'Save', 'Return to Search', and 'Notify' buttons. At the bottom right are 'Add' and 'Update/Display' buttons. The bottom of the page shows 'Elements | Domains'.

Example of a Static Map - Elements page

The preceding Static Map example of the Elements page contains the following fields and example values:

- Map Name: *PhoneTypeDVM*
- Description: Enter a description for this map name.  
For example: *Phone Type DVM*.
- Comments: For example, *Phone Type DVM*.

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

- Order: Enter the sequence order.  
For example: *1*.

- **Element Name:** Enter the name of the element.  
For example: *UniqueGUID*.
- **Data Type:** Select a data type from the drop-down list box.  
For example: *String*.
- **Length:** Enter the character length.  
For example: *36*.
- **Required:** Select or deselect the check box.  
This example shows the Required check box selected.
- **Add (+)/Delete (–) buttons** to add to or remove from the preceding line of values in the Assign Elements to Maps group box.

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

The screenshot displays the 'Domains' page for a static map named 'PhoneTypeDVM'. The page is organized into several sections:

- Map Information:** Map Name: PhoneTypeDVM, Type: Domain Value Map (static).
- Assign Domains to Value Maps:**
  - Domain Name: HRXML
  - Is Unique: ☒
- Assign Elements to the Domain (for HRXML):**
  - Element Name: PHONE\_TP
- Assign Domains to Value Maps:**
  - Domain Name: PSFT
  - Is Unique: ☒
- Assign Elements to the Domain (for PSFT):**
  - Element Name: PHONE\_TYPE
- Assign Domains to Value Maps:**
  - Domain Name: UniqueGUID
  - Is Unique: ☒
- Assign Elements to the Domain (for UniqueGUID):**
  - Element Name: UniqueGUID

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

Example of a Static Map - Domains page

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

- **Map Name:** *PhoneTypeDVM*
  - **Type:** *Domain Value Map (static)*
- The Assign Domains to Value Maps group box contains the following fields and example values:
- **Domain Name:** Enter the name of the domain.  
For example: *HRXML*.
  - **Is Unique:** Select or deselect this check box.  
This example shows the Is Unique check box selected.

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

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

- Element Name: Select an element name from the drop-down list box.  
For example: *PHONE\_TP*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.
- Domain Name: Enter the name of the domain.  
For example: *PSFT*.
- Is Unique: Select or deselect this check box.

This example shows the Is Unique check box selected.

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

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

- Element Name: Select an element name from the drop-down list box.  
For example: *PHONE\_TYPE*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

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

**Elements** | **Domains**

**Map Name** CountryCodeXREF **Type** Dynamic

**\*Description** Country Code XREF **Options**

**Comments**

Assign Elements to Maps					Personalize	Find	First	1-3 of 3	Last
Order	*Element Name	*Data Type	Length	Required					
1	UniqueGUID	String	36	<input checked="" type="checkbox"/>					
2	COUNTRY	String	3	<input checked="" type="checkbox"/>					
3	COUNTRYCODE	String	3	<input checked="" type="checkbox"/>					

**Export**

**Delete**

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

**Elements** | **Domains**

Example of a Dynamic Map - Elements page

The preceding Dynamic Map example of the Elements page contains the following fields and example values:

- Map Name: *CountryCodeXREF*

- Type: *Dynamic*
- Description: Enter a description for this map name.  
For example: *COUNTRYXREF*.
- Comments: *COUNTRYXREF*  
The Assign Elements to Maps group box contains the following fields and example values:
- Order Enter the sequence order.  
For example: *1*.
- Element Name: Enter the name of the element.  
For example: *UniqueGUID*.
- Data Type: Select from the drop-down list box.  
For example: *String*.
- Length: Enter the character length.  
For example: *36*.
- Required—select/clear the check box.  
This example shows the Required check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to Maps group box.

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

The screenshot displays the 'Domains' tab in the PeopleSoft interface. At the top, there are tabs for 'Elements' and 'Domains'. Below this, the 'Map Name' is 'CountryCodeXREF' and the 'Type' is 'Cross-reference (dynamic)'. The page shows three sections for assigning domains to value maps:

- Assign Domains to Value Maps:** This section has a 'Find | View 1' button and a pagination indicator '1-3 of 3'. It contains a text field for '\*Domain Name' with the value 'HRXML' and a checked 'Is Unique' checkbox. Below this is a sub-section 'Assign Elements to the Domain' with a 'Personalize | Find | View All' button and a pagination indicator '1 of 1'. It contains a table with one row: '1' | 'COUNTRYCODE'.
- Assign Domains to Value Maps:** This section has a 'Find | View All' button and a pagination indicator '1 of 1'. It contains a text field for '\*Domain Name' with the value 'PSFT' and a checked 'Is Unique' checkbox. Below this is a sub-section 'Assign Elements to the Domain' with a 'Personalize | Find | View All' button and a pagination indicator '1 of 1'. It contains a table with one row: '1' | 'COUNTRY'.
- Assign Domains to Value Maps:** This section has a 'Find | View All' button and a pagination indicator '1 of 1'. It contains a text field for 'Domain Name' with the value 'UniqueGUID' and a checked 'Is Unique' checkbox. Below this is a sub-section 'Assign Elements to the Domain' with a 'Personalize | Find | View All' button and a pagination indicator '1 of 1'. It contains a table with one row: '1' | 'UniqueGUID'.

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. The 'Elements | Domains' tabs are visible at the bottom left.

Example of a Dynamic Map - Domains page

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

- Map Name: *CountryCodeXREF*
- Type: *Cross-reference (dynamic)*

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

- Domain Name: Enter the name of the domain.  
For example: *HRXML*.
- Is Unique: Select or deselect this check box.  
This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Domains to Value Maps group box.

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

- Element Name: Select an element name from the drop-down list box.  
For example: *COUNTRYCODE*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

- **Domain Name:** Enter the name of the domain.  
For example: *PSFT*.
- **Is Unique:** Select/clear check box.  
This example shows the Is Unique check box selected.
- **Add (+)/Delete (–) buttons** to add to or remove from the values in the preceding Assign Elements to the Domain group box.  
The Assign Elements to the Domain group box contains the following fields and example values:
- **Element Name:** Select an element name from the drop-down list box.  
For example: *COUNTRY*.
- **Add (+)/Delete (–) buttons** to add to or remove from the values in the preceding Assign Elements to the Domain group box.

### Task 13-3-4: Assigning Mapping Setups

To assign mapping setups for all of the maps that you want PeopleSoft Staffing to use:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Setup.  
The Mapping Setup page appears.  
Search and select the values required in the Mapping Setup page, as shown in the following example:

Mapping Setup page

2. On the Mapping Setup page, in the Staffing Element field, select a staffing element from the drop-down list box.  
For example: *Country Code*.  
The staffing element is system data.
3. In the Map Name field, click the lookup button to search for and select the map name that you want to use.  
For example: *CountryCodeXREF*.  
In previous setup steps, you created the available map names.
4. In the Domain Name field, click the lookup button to search for and select the domain that you want to use.  
For example: *HRXML*.

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

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

## Task 13-3-5: Defining Mapping Values

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

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

The Mapping Setup Values page appears, as shown in the following example:

**Mapping Setup Values**

Map Name CountryCodeXREF Domain Name HRXML

**Mapping Values**

**Mapping Setup** Personalize | Find | View 100 | First 1-5 of 240 Last

	Select	Country	Description
1	Select	ABW	Aruba
2	Select	AFG	Afghanistan
3	Select	AGO	Angola
4	Select	AIA	Anguilla
5	Select	ALB	Albania

**Mapping Setup Values** Personalize | Find | View All | First 1 of 1 Last

Sequence Number	Country
1	

Save Return to Search Notify Refresh

Mapping Setup Values page

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

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

3. Edit the sequence and country.
4. Click Save.
5. Repeat the preceding steps to define mapping values for all of the maps that you want PeopleSoft Staffing to use.



---

**Note.** Before you can use the Resume Parsing feature, you must define the supplier at Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Supplier Integration Setup.

---

See the product documentation for PeopleSoft FSCM: Staffing Front Office for additional information on installation options, supplier setup, and mapping configuration.



## Chapter 14

# Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management

This chapter discusses:

- Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration
- Activating the Integration Queues
- Activating the Integration Services and Routings
- Transforming the Contract Transaction Service

## **Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration**

---

The following instructions detail the process to integrate PeopleSoft 9.2 Transaction Billing Processor (TBP) with the PeopleSoft 9.2 Customer Relationship Management (CRM) database. PeopleSoft Lease Administration (LA) also uses PeopleSoft TBP functionality; however, because it is in the same database, LA does not require any additional setup.

Only perform the following tasks if you want to integrate your PeopleSoft FSCM and PeopleSoft CRM databases.

### **Task 14-1: Activating the Integration Queues**

---

To turn on the integration queues (channels):

1. Sign in to PeopleSoft Pure Internet Architecture (PIA).
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.

3. On the Queues search page, search for and select the queue name *CONTRACT*.

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

### Queue Definitions

**Queue Name** CONTRACT

**Description**

**Comments**

☒ **Archive** ☐ **Unordered**

**Queue Status**

**Owner ID**

**Operations Assigned to Queue**

View All | First 1-5 of 5 Last

Service Operations	Version
CONTRACT_REQUEST	VERSION_1
CONTRACT_RESPONSE	VERSION_1
CONTRACT_TXN	VERSION_1
CONTRACT_TXN	VERSION_2
PENDING_ACTIVITY	VERSION_1

Save

**Define Partitioning Fields**

View All | First 1-3 of 3 Last

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	<input type="text"/>
<input type="checkbox"/>	PUBLISHER	<input type="text"/>
<input type="checkbox"/>	PUBPROC	<input type="text"/>

Add Field

Return to Search Notify

Add Update/Display

Queue Definitions page

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

## Task 14-2: Activating the Integration Services and Routings

This section discusses:

- Understanding Integration Service and Routing Activation
- Understanding New Routing Definition Creation
- Activating the Integration Services and Configuring the Routing Definition

### Understanding Integration Service and Routing Activation

You must activate the following four services:

- CONTRACT\_REQUEST (Asynchronous)
- CONTRACT\_RESPONSE (Asynchronous)
- CONTRACT\_TXN (VERSION\_2) (Asynchronous)
- PENDING\_ACTIVITY (Synchronous)

The PeopleSoft system delivers routings for each of these service operations. For example, the PeopleSoft system delivers a routing named CONTRACT\_REQUEST for the service operation CONTRACT\_REQUEST, with the default Sender node as PSFT\_CR and the default Receiver node as PSFT\_EP.

However, sender and receiver nodes are *only* editable when you are creating the new routing. After you create and save the routing, you cannot modify the sender and receiver nodes.

Therefore, you may need to create new routings to edit your sender and receiver nodes. You can create multiple routing instances with different names for the same service operation. In the example case in the steps that follow, CONTRACT\_REQUEST is one instance and CONTRACT\_REQUEST1 is another instance.

Because the routings that the PeopleSoft system delivers are already created and the nodes are no longer editable, you must configure your nodes. Use one of the following three methods described here:

- Configure the nodes PSFT\_CR and PSFT\_EP with the valid databases so that the Sender node PSFT\_CR and Receiver node PSFT\_EP are valid and functional.
- Delete the routing (CONTRACT\_REQUEST) that the PeopleSoft system supplies and then create a new instance of the service operation.
- Create a *new* routing instance of the service operation with a different name (CONTRACT\_REQUEST1 as shown in the steps that follow) and then supply the proper sender and receiver nodes (a prerequisite).

---

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

---

## Understanding New Routing Definition Creation

Use the information in this section to help you determine how to configure the new routing definition in the following section. Activating the Integration Services and Configuring the Routing Definition.

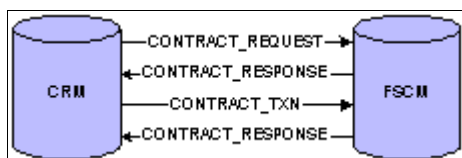
As a prerequisite, you must know which databases you are integrating. In the example of CONTRACT\_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT\_RESPONSE, the receiver node is the PeopleSoft CRM database.

The service operations (messages) flow is as follows:

1. PeopleSoft CRM sends CONTRACT\_REQUEST to PeopleSoft FSCM.
2. PeopleSoft FSCM sends CONTRACT\_RESPONSE to PeopleSoft CRM.

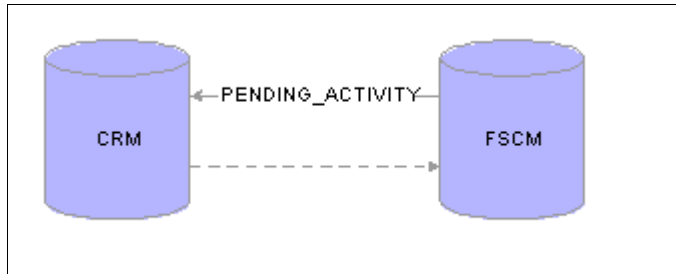
For Recurring and One-Time transactions, this message is sent only once. For On-Demand Transactions, the system sends this message for a second time, after the Contracts Billing Interface (CA\_BI\_INTFC) process completes, to provide the status of the transactions to PeopleSoft CRM.

3. PeopleSoft CRM sends CONTRACT\_TXN to PeopleSoft FSCM, as shown in the following database integration diagram:



Database Integration diagram

4. The `PENDING_ACTIVITY` service operation is sent from PeopleSoft FSCM to PeopleSoft CRM, where the system is configured for synchronous messages, as shown in the following pending activity diagram:



Pending Activity diagram

5. The message identifies whether any pending activities exist for a contract Revenue Plan or Billing Plan. When the status of a Billing Plan or Revenue Plan changes to Complete, the system triggers the message.

---

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

---

## Task 14-2-1: Activating the Integration Services and Configuring the Routing Definition

To activate the integration services (messages):

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Services.
3. On the Services search page, search for and select the service name *CONTRACT\_REQUEST*.
4. Open and activate the service operation by doing one of the following:

- a. Directly open a service operation.

Select PeopleTools, Integration Broker, Integration Setup, Service Operations. Search for *CONTRACT\_REQUEST*.


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

### Services - Search

▼ Search Criteria

Service





CONTRACT



Add a New Value

☐ REST Service

Search

Services		Personalize   Find   View All    		First  1-3 of 3  Last
Service	Service Alias	Object Owner ID	Description	
CONTRACT_REQUEST		Contracts	Contract Request	
CONTRACT_RESPONSE		Contracts	Contract Response	
CONTRACT_TXN		Contracts	Contract Transactions	

Services – Search page

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

Each service has a corresponding service operation that the PeopleSoft system delivers. For each of the service operations in the preceding list, you can open the service that has the same name.

Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service name *CONTRACT\_REQUEST*, as shown in the following example:

## Services

Service

CONTRACT\_REQUEST

☐ REST Service Type

\*Description

Contract Request

Comments

Service Alias

Owner ID

Contracts

\*Namespace

http://

[Link Existing Operations](#)
[View WSDL](#)
[Provide Web Service](#)

### Service Operations

Service Operation

Operation Type

Add

### Existing Operations

[Personalize](#) | [Find](#) | [View All](#) | |

First 1 of 1 Last

Operation	Message Links	
Operation.Default Version	Description	Active
CONTRACT_REQUEST.VERSION_1	Contract Request	<input type="checkbox"/>
		Asynch

Save

[Return to Search](#)

Add

Services – Service Operation Request page

Click the *CONTRACT\_REQUEST.VERSION\_1* link in the Operation tab of the Existing Operations grid that lists the Default Version. This link opens the service operation.

After you open a service operation using either of these options, you can activate and configure it.



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

**General** | Handlers | Routings

**Service Operation** CONTRACT\_REQUEST

**Operation Type** Asynchronous - One Way

**\*Operation Description** Contract Request

**Operation Comments**

**Owner ID** Contracts

**Operation Alias**

☐ User/Password Required

**\*Req Verification** None

[Service Operation Security](#)

**Default Service Operation Version**

**\*Version** VERSION\_1

**Version Description** Contract Request

**Version Comments**

**Runtime Schema Validation**

☐ Request Message

☐ Non-Repudiation

☒ Default ☒ Active

**Routing Status**

Any-to-Local	Exists
Local-to-Local	Does not exist
Local-to-Atom	Does not exist.

**Routing Actions Upon Save**

☐ Regenerate Any-to-Local

☐ Generate Local-to-Local

**Warning** Regenerating sets all routing field values to their initial state.

**Message Information**

**Type** Request

**Message.Version** CONTRACT\_REQUEST.VERSION\_1 [View Message](#)

**\*Queue Name** CONTRACT [View Queue](#) [Add New Queue](#)

[Save](#) [Return to Service](#) [Add Version](#)

[General](#) | [Handlers](#) | [Routings](#)

Service Operation page: General tab

6. Click Save.
7. Select the Handlers tab to access the Handlers page.

8. On the Handlers page, if any handlers are listed, select *Active* from the Status drop-down list box.

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

---

**Note.** CONTRACT\_REQUEST and CONTRACT\_TXN have handlers defined in PeopleSoft FSCM for Contracts.

---

General | **Handlers** | Routings

**Service Operation** CONTRACT\_REQUEST  
**Default Version** VERSION\_1  
**Operation Type** Asynchronous - One Way

Handlers						Personalize	Find	View All	First	1 of 1	Last
*Name	*Type	Sequence	*Implementation	*Status							
1 ContractRequest	On Notify		Application Class	Active	Details	+	-				

Save Return to Service

General | Handlers | Routings

Service Operation page: Handlers tab

9. Select the Routings tab to access the Routings page.
10. On the Routings page, in the Routing Name field, enter a value such as *CONTRACT\_REQUEST1*.

11. Click the Add (+) button to add the new routing.

The Routing Definitions page for the routing CONTRACT\_REQUEST1 appears, as shown in the following example:

The screenshot displays the 'Routing Definitions' page in a software interface. The page has tabs for 'General', 'Handlers', and 'Routings'. The 'Routings' tab is active, showing a table with columns 'Selected', 'Name', 'Version', and 'Operation Type'. Two rows are listed: 'CONTRACT\_REQUEST' (VERSION\_1, Asynch) and 'CONTRACT\_REQUEST\_CR' (VERSION\_1, Asynch). Below the table are buttons for 'Inactivate Selected Routings', 'Activate Selected Routings', 'Save', and 'Return to Service'. A pop-up window titled 'IB Routing Definitions' is overlaid on the page. It has tabs for 'Routing Definitions', 'Parameters', 'Connector Properties', and 'Routing Properties'. The 'Routing Definitions' tab is active, showing fields for 'Routing Name' (CONTRACT\_REQUEST1), 'Service Operation' (CONTRACT\_REQUEST), 'Version' (VERSION\_1), 'Description' (Contract Request), 'Comments', 'Sender Node' (PSFT\_CR), 'Receiver Node' (PSFT\_EP), 'Operation Type' (Asynchronous - One Way), and 'Owner ID' (Contracts). There are also checkboxes for 'Active' and 'System Generated', and 'Save' and 'Return' buttons at the bottom.

Routing Definitions page

12. Review the discussion and prerequisite details in the previous section, Understanding New Routing Definition Creation, *before* you configure the new routing definition in the next step.
13. Configure the new routing definition as follows:
- Select the Active check box.
  - In the Sender Node field, enter the correct sender node.
  - In the Receiver Node field, enter the correct receiver node.
  - In the Owner ID field, enter the correct object owner ID, if applicable.

---

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

---

- Click Save.
14. Repeat the preceding steps for the following service operations (messages):
- CONTRACT\_RESPONSE
  - CONTRACT\_TXN (VERSION\_2)
  - PENDING\_ACTIVITY

## Task 14-3: Transforming the Contract Transaction Service

PeopleSoft Contracts in PeopleSoft FSCM uses CONTRACT\_TXN version 2 for all of the processing that relates to the PeopleSoft Transaction Billing Processor. PeopleSoft CRM uses CONTRACT\_TXN version 1. The default version is version 1 in PeopleSoft CRM, whereas it is version 2 in PeopleSoft FSCM. Because of the difference in the versions of the same message, you must set up the transformation of incoming message version 1 from PeopleSoft CRM to version 2 in PeopleSoft FSCM.

You need to open the CONTRACT\_TXN Service Operation (Message) properties and activate the non-default version 1 of the message (you activated the default version 2 in earlier steps). Both versions must be active for the transformation to work correctly. The required steps are as follows:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations and search for service name *CONTRACT\_TXN*.

Alternatively, select PeopleTools, Integration Broker, Integration Setup, Services and search for service name *CONTRACT\_TXN*.

2. Click the CONTRACT\_TXN.VERSION\_2 link in the Operation tab of the Existing Operations section.

The Service Operation page for CONTRACT\_TXN appears, as shown in the following example:

The screenshot shows the 'Service Operation' page for 'CONTRACT\_TXN' in the 'General' tab. The page is divided into several sections:

- General Information:** Service Operation: CONTRACT\_TXN, Operation Type: Asynchronous - One Way, \*Operation Description: Contract Transactions, Operation Comments (text area), Owner ID: Contracts, Operation Alias (text field).
- Service Operation Security:** User/Password Required (checkbox), \*Req Verification: None (dropdown).
- Default Service Operation Version:** \*Version: VERSION\_2, Version Description: Contract Transactions, Version Comments (text area).
  - Runtime Schema Validation:** Request Message (checkbox), Non-Repudiation (checkbox).
  - Routing Status:** Any-to-Local: Exists, Local-to-Local: Does not exist, Local-to-Atom: Does not exist.
  - Routing Actions Upon Save:** Regenerate Any-to-Local (checkbox), Generate Local-to-Local (checkbox). Warning: Regenerating sets all routing field values to their initial state.
- Message Information:** Type: Request, Message.Version: CONTRACT\_TXN.VERSION\_2 (with search icon), \*Queue Name: CONTRACT (with search icon). Links: View Message, View Queue, Add New Queue.
- Non-Default Versions:** A table showing versions other than the default.

Version	Description	Active
VERSION_1	Contract Transactions	<input type="checkbox"/>

At the bottom, there are buttons: Save, Return to Service, and Add Version. Navigation links: General | Handlers | Routings.

Service Operation page: General tab

- On the Service Operation - General page, in the Non-Default Versions group box, click the VERSION\_1 link to open the Non-Default Version - VERSION\_1 page for CONTRACT\_TXN, as shown in the following example:

**Service Operation Version**

Service Operation: CONTRACT\_TXN

Service: CONTRACT\_TXN

Service Operation Version: VERSION\_1

Operation Type: Asynchronous - One Way

Description: Contract Transactions

Comments:

☐ Default ☒ Active

**Routing Actions Upon Save**

☐ Generate Any-to-Local

☐ Generate Local-to-Local

☐ Generate Local-to-Atom

**Runtime Schema Validation**

☐ Request Message

☐ Non-Repudiation

**Message Information**

Type: Request

Message Version: CONTRACT\_TXN.VERSION\_1 [View Message](#)

\*Queue Name: CONTRACT [View Queue](#) [Add New Queue](#)

**Service Operation Mappings**

Mappings to and from the default service operation version: VERSION\_2 Request Message

CONTRACT\_TXN.VERSION\_2

Transform To Default: CA\_TBP\_TXN

[Save](#) [Return](#)

[Notify](#)

[Service Operation Versions](#) | [Service Operation Versions](#)

Service Operation Version page

- Enter the values shown in the preceding example.
- Select the Active check box to activate the service operation.
- Select Save and then click Return.
- Select the Routings tab to access the Routings page.
- On the Routings page, click the routing link that you added or activated in the previous task.
- Select the Parameters tab to access the Parameters page.
- On the Parameters page, in the Application Engine name field, enter *CA\_TBP\_TXN* for Transform Program 1.
- In the External Alias field, enter *CONTRACT\_TXN.VERSION\_1*.
- In the Message.Ver into Transform 1 field, enter *CONTRACT\_TXN.VERSION\_1*.

13. In the Message.Ver out of Transforms field, enter *CONTRACT\_TXN.VERSION\_2*, as shown in the following example:

IB Routings Definitions page: Parameters tab

14. Click Save.  
15. Clear the Application Server and Web Server cache before you use the system.

---

**Note.** The installation of PeopleSoft Transaction Billing Processor 9.2 for PeopleSoft FMS is now complete.

---

## See Also

*PeopleSoft CRM: Services Foundation*, "Setting Up an Integration to the Transaction Billing Processor"

## Chapter 15

# Installing PeopleSoft 9.2 Maintenance Management with Microsoft Project 2007/2010

This chapter discusses:

- Understanding the Integration with Microsoft Project
- Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine
- Installing Microsoft Project 2007/2010
- Configuring the Microsoft Project Integration Process

## **Understanding the Integration with Microsoft Project**

---

This chapter describes the integration of PeopleSoft Maintenance Management with Microsoft Project 2007 or Microsoft Project 2010. The integration procedure includes the following tasks:

---

**Important!** It is important that you carry out these tasks in the order given in this chapter.

---

1. Set up a PeopleSoft Process Scheduler server on a Microsoft Windows machine to run against the PeopleSoft 9.2 Maintenance Management database.  
The integration with Microsoft Project 2007 or Microsoft Project 2010 uses a PeopleSoft Process Scheduler server to communicate with the Microsoft Project.
2. Install the Microsoft Project 2007 or Microsoft Project 2010 software on the PeopleSoft Process Scheduler server.
3. Configure the Integration process.

See the product documentation for PeopleSoft FSCM: Maintenance Management for more information about PeopleSoft Maintenance Management integration with Microsoft Project.

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

---

Follow the standard installation instruction to install PeopleSoft PeopleTools on a Microsoft Windows machine, and then configure that machine as a process scheduler to connect to the PeopleSoft 9.2 FSCM database where the PeopleSoft Maintenance Management product resides.

See the PeopleTools installation guide for your database platform, "Setting up Process Scheduler on Windows."

## **Task 15-2: Installing Microsoft Project 2007/2010**

---

Install Microsoft Project 2007 or Microsoft Project 2010 on the same Microsoft Windows machine where the PeopleSoft Process Scheduler server resides.

---

**Important!** You should not install the PeopleSoft-Microsoft Project Integrator on the PeopleSoft Process Scheduler that runs the PeopleSoft Maintenance Management's Microsoft Project integration.

---

## **Task 15-3: Configuring the Microsoft Project Integration Process**

---

To configure the integration process:

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Process Scheduler, Processes.
3. On the Process search page, search for and select process name *WM\_MSP*.  
The Process Definition page appears.
4. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.



5. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler server that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:

The screenshot displays the 'Process Definition Options' page for the process 'WM\_MSP'. The page is part of the 'Employee Self Service' application, under the 'Processes' section. The 'Process Definition Options' tab is selected, showing various configuration options. The 'Process Type' is 'Application Engine' and the 'Name' is 'WM\_MSP'. The 'Server Name' field is populated with 'PSNT' and the 'Recurrence Name' field is empty. The 'On File Creation' section includes a 'File Dependency' checkbox and a 'Wait For File' field. The 'System Recovery Process' section includes a 'Process Type' and a 'Process Name' field. The 'Process Security' section includes a 'Component' field and a 'Process Groups' field. The 'Component' field is populated with 'WM\_MSP' and the 'Process Groups' field is populated with 'WMALL'. The page also includes a 'Save' button, a 'Return to Search' button, a 'Notify' button, an 'Add' button, and an 'Update/Display' button. The bottom of the page shows a breadcrumb trail: 'Process Definition | Process Definition Options | Override Options | Destination | Page Transfer | Notification | Message | Runtime Parameters | OS390 Option | URL Links'.

Process Definition Options page for process name WM\_MSP

6. Click Save.
7. Select PeopleTools, Process Scheduler, Processes.  
The Process search page appears.
8. On the Process search page, search for and select process name *WM\_MSP\_IMP*.  
The Process Definition page appears.
9. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.

10. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler server that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:

The screenshot displays the 'Process Definition Options' page for the process 'WM\_MSP\_IMP'. The page is part of the 'Employee Self Service' application, under the 'Processes' section. The 'Process Definition Options' tab is active, showing fields for 'Process Type' (Application Engine), 'Name' (WM\_MSP\_IMP), 'Server Name' (PSNT), and 'Recurrence Name'. Below these are sections for 'On File Creation' (File Dependency, Wait For File, Time Out Max Minutes), 'System Recovery Process' (Process Type, Process Name), 'Process Security' (Component, Process Groups), and 'Process Groups' (WM\_MSP\_IMPORT, WMALL). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display', along with a breadcrumb trail.

Process Definition Options page for process name WM\_MSP\_IMP

11. Click Save.

## Chapter 16

# Installing PeopleSoft Maintenance Management 9.2 Work Order Attachment Print

This chapter discusses:

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

## Understanding PeopleSoft Work Order Attachment Print

---

PeopleSoft Maintenance Management Work Order Attachment Print utilizes the printing capabilities of many additional component (third-party) applications that support printing files from a command-line interface. A variety of documents that are created using Microsoft Office, such as Microsoft Word, Microsoft PowerPoint, Microsoft Excel, as well as other types of documents such as PDF, TXT, JPEG, GIF and BMP can be printed depending on the chosen additional component application.

## Prerequisites

---

Ensure that you meet the following requirements:

- You have installed an additional component application that allows you to print a list of files of various types to a network printer from a single command-line interface.
- You have installed the additional component application on the PeopleSoft Process Scheduler server that you use to print Work Order Attachments.  
This should be the same process scheduler server that you currently use to print the Work Order Task Details report.
- You are running PeopleSoft PeopleTools 8.55.05 or higher.

---

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

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

---

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

This section discusses:

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

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

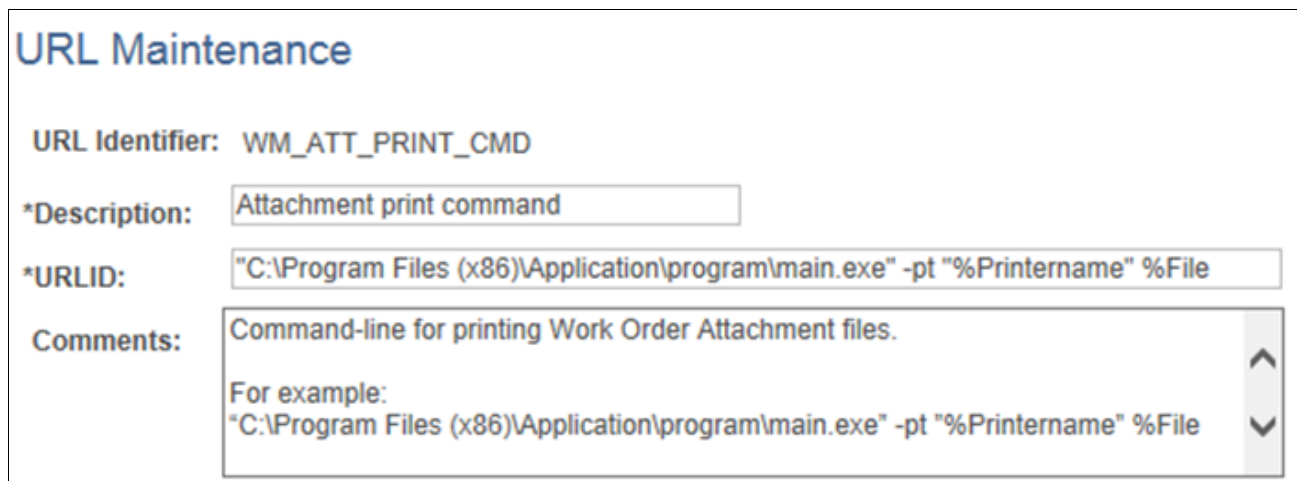
After you install the additional component application, you must update the URL that is used by the PeopleSoft Work Order Attachment Print feature to call the additional component application to print attachments.

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

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

1. Select PeopleTools, Utilities, Administration, URLs.

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



**URL Maintenance**

URL Identifier: WM\_ATT\_PRINT\_CMD

\*Description: Attachment print command

\*URLID: "C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File

Comments: Command-line for printing Work Order Attachment files.  
For example:  
"C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File

URL Maintenance page - Attachment print command

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

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

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

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

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

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

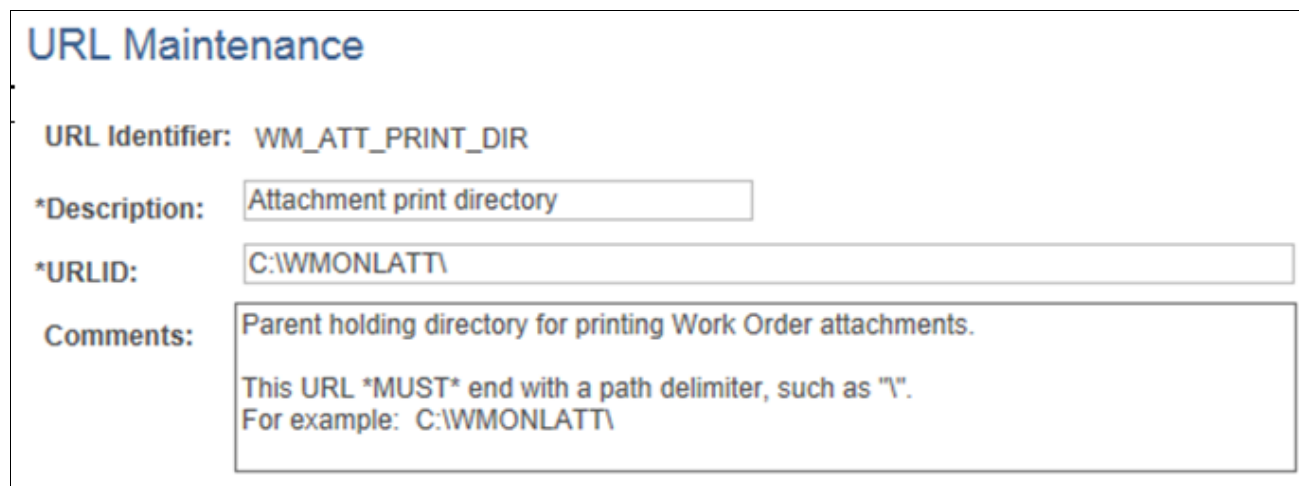
While printing Work Order Attachments, the PeopleSoft Work Order Attachment Print process temporarily downloads the attachments to the server in a holding directory, where they can then be passed on to the additional component application for printing. The URL WM\_ATT\_PRINT\_DIR determines the directory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

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

To use a different temporary download holding directory on your server:

1. Select PeopleTools, Utilities, Administration, URLs.

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



The screenshot shows the 'URL Maintenance' page. At the top, the title 'URL Maintenance' is displayed in blue. Below it, the 'URL Identifier' is set to 'WM\_ATT\_PRINT\_DIR'. The '\*Description\*' field contains 'Attachment print directory'. The '\*URLID\*' field contains 'C:\WMONLATT\'. The 'Comments' field contains the text: 'Parent holding directory for printing Work Order attachments. This URL \*MUST\* end with a path delimiter, such as "\". For example: C:\WMONLATT\'. The fields are represented by text boxes with a light blue border.

URL Maintenance page - Attachment print directory

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

---

**Note.** The slash ("/") path delimiter at the end of the Attachment print directory URL is required and must be entered.

---

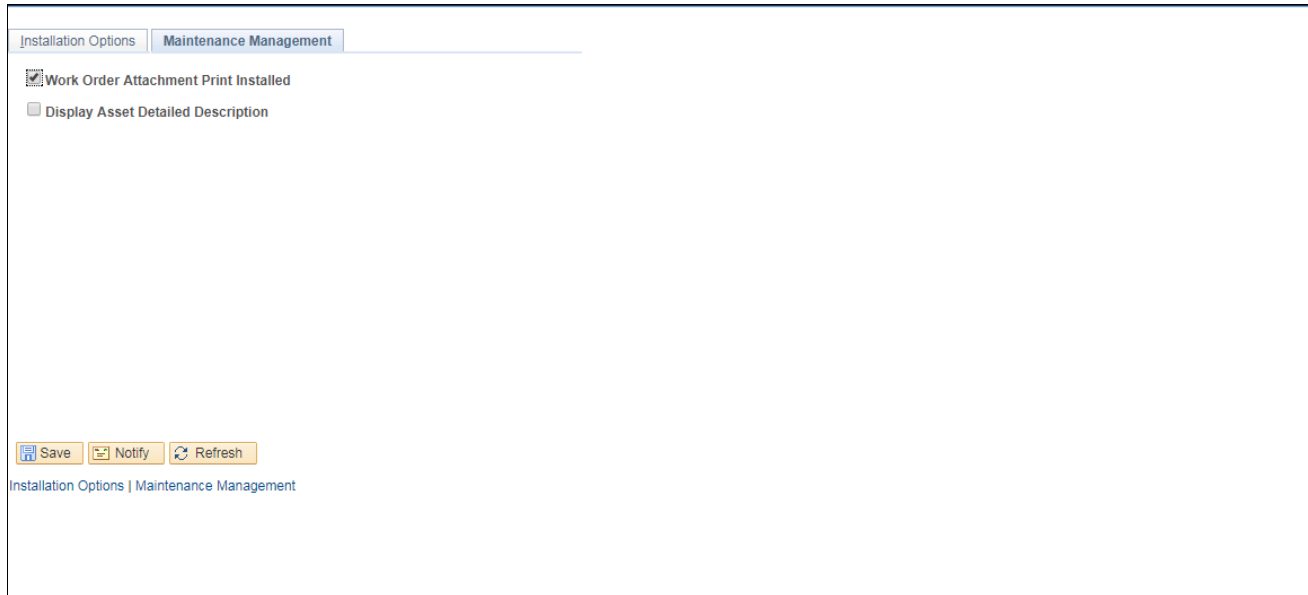
## Task 16-2: Enabling the PeopleSoft Work Order Attachment Print Features

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

To enable the Print Attachments feature:

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

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



Installation Options | Maintenance Management

Installation Options - Maintenance Management page

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

See the product documentation for PeopleSoft FSCM: Maintenance Management for user set up and implementation information.

## Chapter 17

# Integrating PeopleSoft 9.2 Asset Management and Physical Inventory Solutions

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory
- Configuring the Inbound Nodes
- Activating Service Operations
- Running Message Channel
- Activating the Domain for Asynchronous Messaging

## Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory

---

PeopleSoft 9.2 Asset Management integrates with additional component (third-party) Physical Inventory Solutions to provide the following functionality:

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

---

**Note.** In prior PeopleSoft releases, this feature was only available using flat files. If you do not implement the Physical Inventory feature, or you implement using flat files, the tasks in this chapter are optional.

---

## Task 17-1: Configuring the Inbound Nodes

---

Before configuring the nodes, you need to set up the Integration Gateway.

See "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions.

To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.

- On the Nodes search page, search for and select the node name *PSFT\_XINBND*.

The Node Definitions page for the PSFT\_XINBND node appears, as shown in the following example:

**Node Definitions** | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Node Name: PSFT\_XINBND Copy Node

\*Description: External Inbound node Rename Node

\*Node Type: External Default Local Node

\*Authentication Option: None Local Node

☐ Default Local Node

☐ Local Node

☒ Active Node Delete Node

☐ Non-Repudiation

☐ Segment Aware

\*Default User ID: VP1 WSIL URL

WSIL URL:

Hub Node:

Master Node:

Company ID:

IB Throttle Threshold:

Image Name:

Codeset Group Name:

External User ID:

External Password:

Confirm External Password:

External Version:

[Contact/Notes](#) [Properties](#)

Save

Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Node Definitions - PSFT\_XINBND page

- On the Node Definitions page, enter the ID of the Asset Management Inventory user in the Default User ID field.
- Click Save.
- Click Return to Search.
- On the Nodes search page, search for and select the node name *ANONYMOUS*.



7. On the Node Definitions page, in the Default User ID field, enter the value for Asset Management Inventory user. A Node Definition page is shown in the following example:

**Node Definitions** | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

**Node Name** ANONYMOUS Copy Node

**\*Description** Used internally by IB system. Rename Node

**\*Node Type** External Default Local Node

**\*Authentication Option** None Local Node

**\*Default User ID** VP1 Active Node

**WSIL URL** Non-Repudiation

**Hub Node** Segment Aware

**Master Node**

**Company ID**

**IB Throttle Threshold**

**Image Name**

**Codeset Group Name**

**External User ID**

**External Password**

**Confirm External Password**

**External Version**

Save Contact/Notes Properties

Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Node Definitions - Anonymous page

8. Click Save.

## Task 17-2: Activating Service Operations

To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

- On the Service Operations search page, search for and select the service operation *GET\_PIDATA*.  
The Service Operations - General page appears, as shown in the following example:

The screenshot displays the 'Service Operations - General' page. At the top, there are tabs for 'General', 'Handlers', and 'Routings'. The 'General' tab is active. The page contains the following fields and sections:

- Service Operation:** GET\_PIDATA
- Operation Type:** Asynchronous - One Way
- \*Operation Description:** AM Physical Inventory Request
- Operation Comments:** AM Physical Inventory Request Details
- Owner ID:** Asset Management
- Operation Alias:** (empty)
- Service Operation Security:**
  - ☐ User/Password Required
  - \*Req Verification:** None
- Default Service Operation Version:**
  - \*Version:** v1
  - Version Description:** AM Physical Inventory Request
  - Version Comments:** (empty)
  - ☒ Default
  - ☒ Active
- Runtime Schema Validation:**
  - ☐ Request Message
  - ☐ Non-Repudiation
- Routing Status:**

Any-to-Local	Does not exist
Local-to-Local	Does not exist
Local-to-Atom	Does not exist
- Routing Actions Upon Save:**
  - ☐ Generate Any-to-Local
  - ☐ Generate Local-to-Local
- Message Information:**

Type	Request
Message.Version	GET_PIDATA.VERSION_1
*Queue Name	ASSET_MANAGEMENT

Buttons: View Message, View Queue, Add New Queue

Service Operations - General page

- On the General page, select the Active check box, and then click Save.
- On the Save Message dialog box, click OK.

5. Select the Routings tab to access the Routings page, as shown in the following example:

General | Handlers | **Routings**

Service Operation GET\_PIDATA  
Default Version v1  
Routing Name

Routing Definitions								Personalize	Find	View All	First	1 of 1	Last
Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results					
<input type="checkbox"/>	GET_PIDATA	v1	Asynch	AM920DVL	PSFT_XOUTBND	Outbound	Inactive						

[Return to Service](#)

General | Handlers | Routings

Service Operations - Routings page

6. On the Routings page, select the check box for the routing GET\_PIDATA, as shown in the following example:

General | Handlers | **Routings**

Service Operation GET\_PIDATA  
Default Version v1  
Routing Name

Routing Definitions								Personalize	Find	View All	First	1 of 1	Last
Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results					
<input checked="" type="checkbox"/>	GET_PIDATA	v1	Asynch	AM920DVL	PSFT_XOUTBND	Outbound	Active	Success					

[Return to Service](#)

General | Handlers | Routings

Service Operations - Routings page with the routing definition selected

7. Click the Activate Selected Routings button.
8. Click Save to save Routing Definition.

9. On the Service Operations search page, search for and select the service operation *GET\_PIDATA\_ACK*.

The Service Operations - General page for *GET\_PIDATA\_ACK* appears, as shown in the following example:

**General** | Handlers | Routings

Service Operation: GET\_PIDATA\_ACK  
 Operation Type: Asynchronous - One Way  
 \*Operation Description: Get Physical Inv Data Response  
 Operation Comments: Get Physical Inventory Data Response from third party vendor  
 Owner ID: Asset Management  
 Operation Alias:   
☐ User/Password Required  
 \*Req Verification: None  
 Service Operation Security

**Default Service Operation Version**

\*Version: v1  
 Version Description: Get Physical Inv Data Response  
 Version Comments: Get Physical Inventory Data Response from third party vendor  
☒ Default ☒ Active

**Runtime Schema Validation**

☐ Request Message  
☐ Non-Repudiation

**Routing Status**

Any-to-Local	Does not exist
Local-to-Local	Does not exist
Local-to-Atom	Does not exist

**Routing Actions Upon Save**

☐ Generate Any-to-Local  
☐ Generate Local-to-Local

**Message Information**

Type	Request
Message.Version	GET_PIDATA_ACK.v1 <a href="#">View Message</a>
*Queue Name	ASSET_MANAGEMENT <a href="#">View Queue</a> <a href="#">Add New Queue</a>

[Save](#) [Return to Service](#) [Add Version](#)

[General](#) | [Handlers](#) | [Routings](#)

### Service Operations - General page

10. On the General page, select the Active check box and then click Save.
11. On the Save Message dialog box, click OK.

12. Select the **Handlers** tab to access the Handlers page, as shown in the following example:

General | **Handlers** | Routings

Service Operation GET\_PIDATA\_ACK  
 Default Version v1  
 Operation Type Asynchronous - One Way

Handlers					Personalize   Find   View All   [Grid Icon]   [Print Icon]	First   1 of 1   Last
*Name	*Type	Sequence	*Implementation	*Status		
1 Get_PIData_Ack	On Notify		Application Class	Active	Details	+ -

Save Return to Service

General | Handlers | Routings

Service Operations - Handlers page

13. Click Save.

14. Select the **Routings** tab to access the Routings page, as shown in the following example:

General | Handlers | **Routings**

Service Operation GET\_PIDATA\_ACK  
 Default Version v1  
 Routing Name  Add

Routing Definitions							Personalize   Find   View All   [Grid Icon]   [Print Icon]	First   1 of 1   Last
Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input checked="" type="checkbox"/>	GET_PIDATA_ACK	v1	Asynch	PSFT_XINBND	AM920DVL	Inbound	Inactive	

Inactivate Selected Routings Activate Selected Routings

Save Return to Service

General | Handlers | Routings

Service Operations - Routings page

15. On the Routings page, select the check box for the routing GET\_PIDATA\_ACK.

16. Click the Activate Selected Routings button.

17. Click Save.

## Task 17-3: Running Message Channel

To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.

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

## Queue Definitions

Queue Name

Description

Comments

☐ Purge Data ?

☒ Archive ☒ Unordered

Queue Status

Owner ID

Operations Assigned to Queue

Service Operations		View All   <span>1-21</span>	First	1-10 of 19	Last
Service Operation	Version				
ADD_ASSET_PUB	VERSION_1				
ADD_EMP_PUB	VERSION_1				
ADD_PROP_PUB	VERSION_1				
GET_DISCOVERYDATA	VERSION_1				
GET_DISCOVERYDATA_ACK	VERSION_1				
GET_DISCOVERYDATA_STATUS_ACK	VERSION_1				
GET_PIDATA	v1				
GET_PIDATA_ACK	v1				
IT_SYNC_ASSET_UPDATE	v1				
LST_DELETEDPROPS_REQ	VERSION_1				

Define Partitioning Fields

Common Fields			View All   <span>1-21</span>	First	1-3 of 3	Last
Include	Field	Alias Name				
<input type="checkbox"/>	OPERATIONNAME	<input type="text"/>				
<input type="checkbox"/>	PUBLISHER	<input type="text"/>				
<input type="checkbox"/>	PUBPROC	<input type="text"/>				

Queue Definitions page

3. On the Queue Definitions page, verify that the Queue Status is set to *Run*.
4. If the Queue Status is Paused, select *Run* from the Queue Status drop-down list box.
5. Click Save.
6. When the Queue Saved Message dialog box appears, click OK.

## Task 17-4: Activating the Domain for Asynchronous Messaging

To enable message handler and dispatcher:

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

```

Quick-configure menu -- domain: TEST
=====
Features                               Settings
=====
1> Pub/Sub Servers      : Yes   17> DBNAME       : [TEST ]
2> Quick Server        : No    18> DBTYPE       : [ORACLE]
3> Query Servers       : No    19> UserId       : [QEDMO]
4> Jolt                : Yes   20> UserPswd    : [ ]
5> Jolt Relay          : No    21> DomainID    : [TESTSERV]
6> WSL                 : No    22> AddToPATH   : [C:\oracle\product\11.2.0\client_
1\bin]
7> PC Debugger         : Yes   23> ConnectID   : [people ]
8> Event Notification : Yes   24> ConnectPswd: [ ]
9> MCF Servers         : No    25> DomainConnectPswd: [ ]
10> Perf Collator      : No    26> WSL Port    : [7000]
11> Analytic Servers   : Yes   27> JSL Port    : [9000]
12> Domains Gateway    : No    28> JRAD Port   : [9100]
13> Push Notifications : No

Actions
=====
14> Load config as shown
15> Custom configuration
16> Edit environment settings
h> Help for this menu
q> Return to previous menu

```

PSADMIN Quick-configure menu

**Note.** PSADMIN configuration supports asynchronous messaging. After you start your application server, you see two new processes—one for Message Handler, and one for Message Dispatcher. After you configure your application server, you need to activate your domain through PeopleSoft Pure Internet Architecture, to ensure that the Handler and Dispatcher pick up your asynchronous messages.

Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

This completes the set up for PeopleSoft Asset Management Physical Inventory Web Services.

See the product documentation for PeopleSoft FSCM: Asset Management, "Performing Asset Physical Inventory," for more information about the PeopleSoft Asset Management Physical Inventory cycle where you can utilize service operations.





## Chapter 18

# Integrating PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems
- Reviewing Configuration Values for IT Asset Management
- Configuring the Inbound Nodes
- Activating Service Operations
- Managing Queue Status
- Activating the Domain for Asynchronous Messaging

## Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

---

PeopleSoft 9.2 IT Asset Management integrates with additional component (third-party) Network Inventory Discovery Systems to provide the following functionality:

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

## Reviewing Configuration Values for IT Asset Management

---

Use these values when integrating PeopleSoft 9.2 IT Asset Management with additional component (third-party) Network Discovery Systems.

The following table lists the HTTPTARGET Connector Properties:

*Property ID	*Property Name	Required	Value	Default
HEADER	sendUncompressed	Yes	Y	Y

*Property ID	*Property Name	Required	Value	Default
HTTPPROPERTY	Method	Yes	Post	Y
PRIMARYURL	URL	Yes	http://<LocalHost>/<DiscoveredInventorySystem>/<ConnectorName>	N

The following table lists the routing definitions for the PSFT\_EP node that Oracle delivers:

Routing Type	Request Message	Request Message Version
Async	GET_DISCOVERYDATA	VERSION_1
Async	GET_DISCOVERYDATA_LCL	VERSION_1
Async	GET_DISCOVERYDATA_ACK	VERSION_1
Async	GET_DISCOVERYDATA_STATUS_ACK	VERSION_1

Next, set up the integration gateways.

See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions to set up integration gateway.

## Task 18-1: Configuring the Inbound Nodes

---

To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT\_XINBND*.

- On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS\_DISCOVERYDATA Service Operation into ITAM for the PSFT\_XINBND node, as shown in the following example:

The screenshot displays the 'Node Definitions' page for the node 'PSFT\_XINBND'. The page is organized into a tabbed interface with 'Node Definitions' selected. The form includes the following fields and options:

- Node Name:** PSFT\_XINBND
- \*Description:** External Inbound node
- \*Node Type:** External (dropdown menu)
- \*Authentication Option:** None (dropdown menu)
- \*Default User ID:** VP1
- WSIL URL:** (empty text field)
- Hub Node:** (empty text field)
- Master Node:** (empty text field)
- Company ID:** (empty text field)
- IB Throttle Threshold:** (empty text field)
- Image Name:** (empty text field)
- Codeset Group Name:** (empty text field)
- External User ID:** (empty text field)
- External Password:** (empty text field)
- Confirm External Password:** (empty text field)
- External Version:** (empty text field)

On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the form, there are links for 'Contact/Notes' and 'Properties', a 'Save' button, and a 'Return to Search' button. At the bottom, there is a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions page for PSFT\_XINBND

- Click Save.
- Click Return to Search.
- On the Nodes search page, search for and select the node name *ANONYMOUS*.

7. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS\_DISCOVERYDATA Service Operation into ITAM for the ANONYMOUS node, as shown in the following example:

The screenshot displays the 'Node Definitions' page for the 'ANONYMOUS' node. The page has a tabbed interface with 'Node Definitions' selected. The configuration fields are as follows:

- Node Name:** ANONYMOUS
- \*Description:** Used internally by IB system.
- \*Node Type:** External (dropdown)
- \*Authentication Option:** None (dropdown)
- \*Default User ID:** VP1
- WSIL URL:** (empty text field)
- Hub Node:** (empty text field)
- Master Node:** (empty text field)
- Company ID:** (empty text field)
- IB Throttle Threshold:** (empty text field)
- Image Name:** (empty text field)
- Codeset Group Name:** (empty text field)
- External User ID:** (empty text field)
- External Password:** (empty text field)
- Confirm External Password:** (empty text field)
- External Version:** (empty text field)

On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the main fields, there are checkboxes for 'Default Local Node', 'Local Node', 'Active Node', 'Non-Repudiation', and 'Segment Aware'. The 'Active Node' and 'Segment Aware' checkboxes are checked. At the bottom, there are tabs for 'Contact/Notes' and 'Properties', a 'Save' button, and a 'Return to Search' button. A breadcrumb trail at the bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions page for ANONYMOUS

8. Click Save.

## Task 18-2: Activating Service Operations

To activate service operations:

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

*PROCESS\_DISCOVERYDATA.*

- On the Service Operations - General page, verify that the Active check box is selected, as shown in the following example:

The screenshot displays the 'General' tab of the Service Operations configuration page for 'PROCESS\_DISCOVERYDATA'. The 'Active' checkbox is selected.

**Service Operation:** PROCESS\_DISCOVERYDATA  
**Operation Type:** Asynchronous - One Way  
**\*Operation Description:** ITAM Process Discovery Data  
**Operation Comments:** ITAM integration of Discovery Data.  
**Owner ID:** Asset Management  
**Operation Alias:**   
**\*Req Verification:** None  
**User/Password Required:** ☐  
**Service Operation Security:** [Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** v1  
**Version Description:** Version 1  
**Version Comments:** Version 1 of PROCESS\_DISCOVERYDATA.  
**Runtime Schema Validation:** ☐ Request Message ☐ Non-Repudiation  
**Routing Status:** ☒ Default ☒ Active  

Any-to-Local	Does not exist
Local-to-Local	Does not exist
Local-to-Atom	Does not exist

**Routing Actions Upon Save:** ☐ Generate Any-to-Local ☐ Generate Local-to-Local

**Message Information**

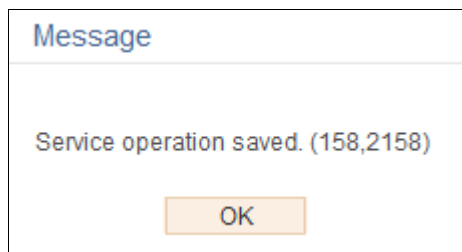
**Type:** Request  
**Message.Version:** PROCESS\_DISCOVERYDATA.v1 [View Message](#)  
**\*Queue Name:** ASSET\_MANAGEMENT [View Queue](#) [Add New Queue](#)

**Buttons:** Save, Return to Service, Add Version  
**Navigation:** General | Handlers | Routings

Service Operations: General page

- Click Save.

5. The message "Service operation saved" displays, as shown in the following example:



Service Operation: Saved Message page

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

*Name	*Type	Sequence	*Implementation	*Status	
1 IT_INTEGRATIONS	On Notify		Application Class	Active	Details

Service Operations: Handlers page

8. On the Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box.
9. Click Save.

10. Select the Routings tab and access the Routings page, as shown in the following example:

General | Handlers | **Routings**

Service Operation PROCESS\_DISCOVERYDATA  
Default Version v1  
Routing Name

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input checked="" type="checkbox"/>	PROCESS_DISCOVERYDATA	v1	Asynch	PSFT_XINBND	AM920DVL	Inbound	Inactive	

[Return to Service](#)

General | Handlers | Routings

Service Operations: Routings page

11. On the Routings page, select the check box for the routing.

12. Click the Activate Selected Routings button.

13. Click Save.

## Task 18-3: Managing Queue Status

To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name *ASSET\_MANAGEMENT*.
3. On the Queue Definitions page, in the Queue Status field, verify that Run is selected.

4. If the Queue Status is paused, select *Run* from the Queue Status drop-down list box, as shown in the following example:

**Queue Definitions**

Queue Name: ASSET\_MANAGEMENT  
 Description: Channel for Asset/IT Assets  
 Comments:   
☐ Purge Data

☒ Archive ☒ Unordered  
 Queue Status: Run  
 Owner ID: Asset Management

**Operations Assigned to Queue**

Service Operation	Version
ADD_ASSET_PUB	VERSION_1
ADD_EMP_PUB	VERSION_1
ADD_PROP_PUB	VERSION_1
GET_DISCOVERYDATA	VERSION_1
GET_DISCOVERYDATA_ACK	VERSION_1
GET_DISCOVERYDATA_STATUS_ACK	VERSION_1
GET_PIDATA	v1
GET_PIDATA_ACK	v1
IT_SYNC_ASSET_UPDATE	v1
LST_DELETEDPROPS_REQ	VERSION_1

**Define Partitioning Fields**

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

Buttons: Save, Add Field, Return to Search, Notify, Add, Update/Display

Queue Definition

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

**Message**

Queue Saved. (158,2137)

OK

Queue Saved Message

7. Click OK.

## Task 18-4: Activating the Domain for Asynchronous Messaging

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



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

```

Quick-configure menu -- domain: TEST

=====
Features                               Settings
=====
1> Pub/Sub Servers      : Yes    17> DBNAME       : [TEST ]
2> Quick Server        : No     18> DBTYPE       : [ORACLE]
3> Query Servers       : No     19> UserId      : [QEDMO ]
4> Jolt                : Yes    20> UserPswd   : [ ]
5> Jolt Relay          : No     21> DomainID   : [TESTSERV]
6> WSL                 : No     22> AddToPATH  : [C:\oracle\product\11.2.0\client_
1\bin]
7> PC Debugger         : Yes    23> ConnectID  : [people ]
8> Event Notification : Yes    24> ConnectPswd:[ ]
9> MCF Servers         : No     25> DomainConnectPswd:[ ]
10> Perf Collator      : No     26> WSL Port   : [7000 ]
11> Analytic Servers   : Yes    27> JSL Port   : [9000 ]
12> Domains Gateway    : No     28> JRAD Port  : [9100 ]
13> Push Notifications : No

=====
Actions
=====
14> Load config as shown
15> Custom configuration
16> Edit environment settings
h> Help for this menu
q> Return to previous menu

```

PSADMIN page

**Note.** PSADMIN configuration supports asynchronous messaging. After you start your application server you see two new processes—one for Message Handler, and one for Message Dispatcher.

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

Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

This completes the setup for PeopleSoft Asset Management with Network Inventory Discovery Systems.

See the product documentation for PeopleSoft FSCM: Asset Management, "Working with the IT Asset Inventory Tool," for more information about this integration.



## Chapter 19

# Installing PeopleSoft 9.2 Mobile Inventory Management

This chapter discusses:

- Understanding the PeopleSoft 9.2 Mobile Inventory Management Product
- Prerequisites
- Accessing Installation Files
- Installing the Oracle WebLogic Server for Mobile
- Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Applying the PeopleSoft Mobile Inventory Management Authentication Provider
- Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management
- Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server
- Undeploying the Mobile Application

## Understanding the PeopleSoft 9.2 Mobile Inventory Management Product

---

The PeopleSoft Mobile Inventory Management product provides tools that integrate handheld bar code data collection devices with the PeopleSoft Supply Chain Management system, improving efficiency and cost savings.

**Note.** From this release, Mobile Inventory transactions coexist in both Oracle Application Developer Framework (ADF) and PeopleSoft Fluid User Interface Architecture.

---

Oracle Application Developer Framework Mobile (ADF Mobile) uses the PeopleSoft Integration Broker and PeopleSoft Component Interfaces (CIs) to enable this process. The Oracle ADF Mobile software is part of Oracle Fusion Middleware. PeopleSoft CIs are PeopleTools components that enable exposure of a PeopleSoft component for synchronous access from another application, and they act as a web service in the PeopleTools Integration Broker. The system then publishes web services through the PeopleSoft Integration Broker to pass transaction data between PeopleSoft applications and additional component (third-party) applications.

For more information about setting up PeopleSoft application servers and web services, refer to the topic "Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management" later in this chapter as well as the following product documentation:

See *PeopleTools: System and Server Administration*.

See *PeopleSoft FSCM: Mobile Inventory Management*.

PeopleSoft Fluid User Interface Architecture *does not use* Integration Broker or the ADF Mobile platform as it is fully integrated with PIA, and is built on PeopleTools technology.

For now, seventeen PeopleSoft Mobile Inventory transactions use the PeopleSoft Fluid User Interface. To find these transactions, in the PIA, select Fluid Home, Mobile Inventory, as shown in the following example:



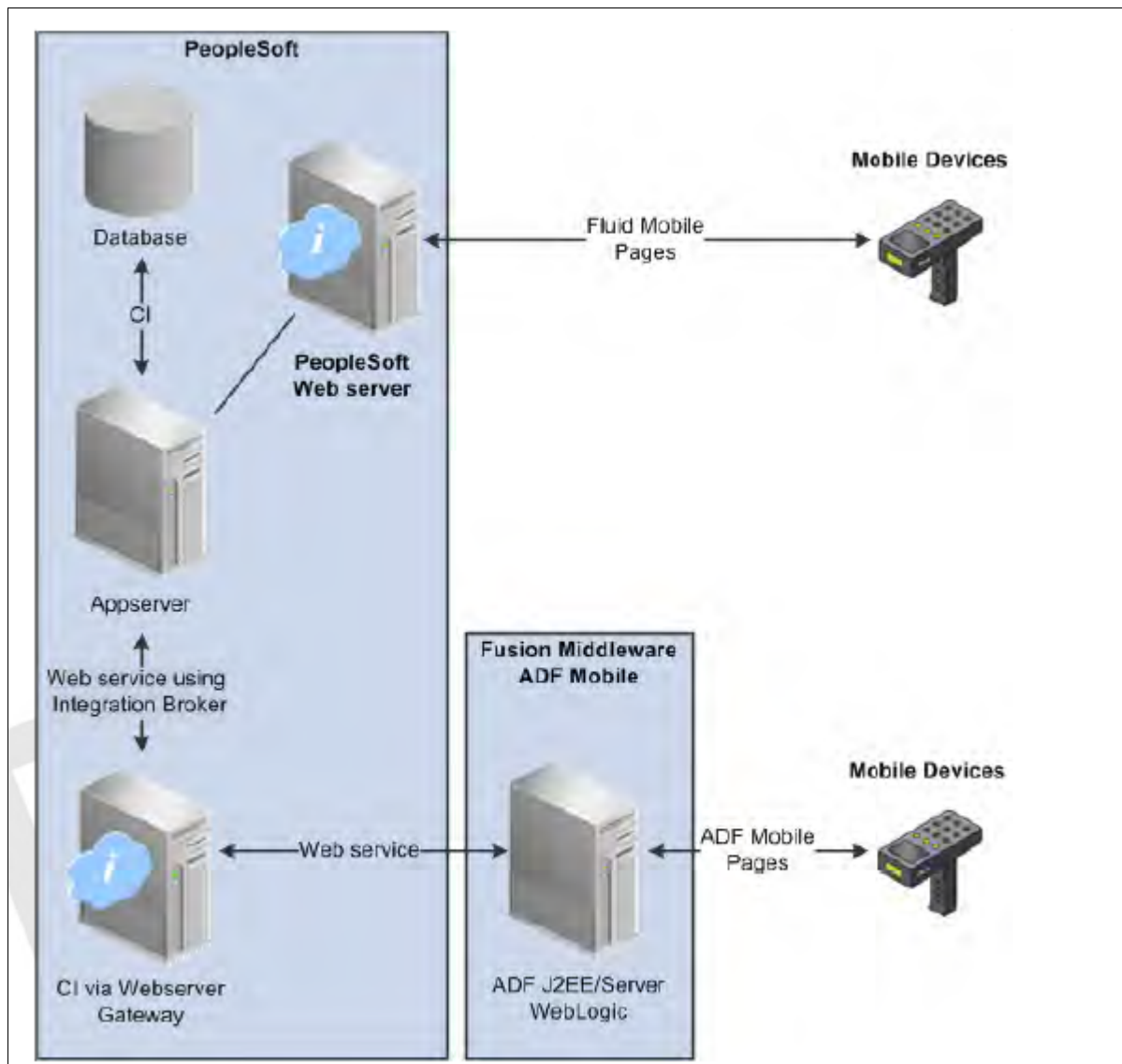
Example of Mobile Inventory transactions available in Fluid User Interface

---

**Note.** No additional installation steps are required for PeopleSoft Fluid User Interface based Mobile Inventory transactions. The installation steps in the subsequent tasks in this chapter are required if you are using ADF Mobile platform.

---

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



Overview of the interface between PeopleSoft and mobile devices

## Prerequisites

The following requirements must be met before you install and run the PeopleSoft 9.2 Mobile Inventory Management product:

- PeopleSoft PeopleTools release

PeopleSoft PeopleTools 8.55.05 or higher is the minimum requirement to run PeopleSoft Mobile Inventory Management 9.2 with PeopleSoft Financials/Supply Chain Management 9.2.

See *PeopleSoft PeopleTools 8.55 Installation* for your database platform.

- Required at Install updates

Before proceeding with your installation, check My Oracle Support, Oracle Software Delivery Cloud (formerly Oracle E-Delivery), and Oracle Technology Network to ensure that you have the most current

Required at Install updates and documentation for the products that you are installing.

See <http://support.oracle.com>.

See <http://edelivery.oracle.com>.

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

- PeopleSoft PeopleTools patches and updates

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

See <http://edelivery.oracle.com>.

See <http://support.oracle.com>.

- PeopleSoft Financials/Supply Chain Management 9.2 Application

To run PeopleSoft 9.2 Mobile Inventory Management, you must be using PeopleSoft Financials/SupplyChain Management 9.2.

- Java

Verify that you have the current 64-bit Java 7 if you are installing on a 64-bit server.

Go to [www.java.com](http://www.java.com) to download the current 64-bit Java 7 to use with the PeopleSoft Mobile Inventory Management installation.

- Oracle Application Developer 11gR1 (11.1.1.6 or 11.1.1.7)

---

**Note.** Oracle Application Developer 11gR2 is not yet supported.

---

Before you install PeopleSoft Mobile Inventory Management 9.2, you must complete the installation of Oracle Application Development Runtime 11.1.1.6 on an Oracle WebLogic 10.3.6 Server instance. You can access the complete Oracle Application Developer 11.1.1.6 Installation guide and the complete Oracle WebLogic 10.3.6 Installation guide from the Oracle Fusion Middleware Documentation Library at: [http://docs.oracle.com/cd/E23943\\_01/index.htm](http://docs.oracle.com/cd/E23943_01/index.htm)

See *Oracle Application Developer 11.1.1.6 Installation*.

See *Oracle WebLogic 10.3.6 Installation*.

- PeopleSoft Inventory 9.2

Before you install PeopleSoft Mobile Inventory Management 9.2, you must complete the installation and setup of PeopleSoft Inventory 9.2.

- PeopleSoft Purchasing 9.2

Before you install PeopleSoft Mobile Inventory Management 9.2, you must complete the installation and setup of PeopleSoft Purchasing 9.2 *only* if you plan to use receiving and delivery.

- Audit reports to clean your target databases

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

## See Also

My Oracle Support, Certifications for PeopleSoft PeopleTools hardware and software requirements

*PeopleSoft Financials/Supply Chain Management Hardware and Software Requirements*, "Defining PeopleSoft Mobile Inventory Management Hardware and Software Requirements."

*Oracle Application Development Framework 11.1.1.6 Hardware and Software Requirements*.

## Task 19-1: Accessing Installation Files

---

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

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

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

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

See <http://edelivery.oracle.com>.

See <http://support.oracle.com>.

## Task 19-2: Installing the Oracle WebLogic Server for Mobile

---

This section discusses:

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

### Understanding the Oracle WebLogic Server Installation for Mobile

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

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

### Task 19-2-1: Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management

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

---

**Note.** You can access the complete installation guide for the Oracle WebLogic Server 10.3.6 from the Oracle Fusion Middleware Documentation Library at:  
<http://www.oracle.com/technetwork/middleware/ias/downloads/wls-main-097127.html>.

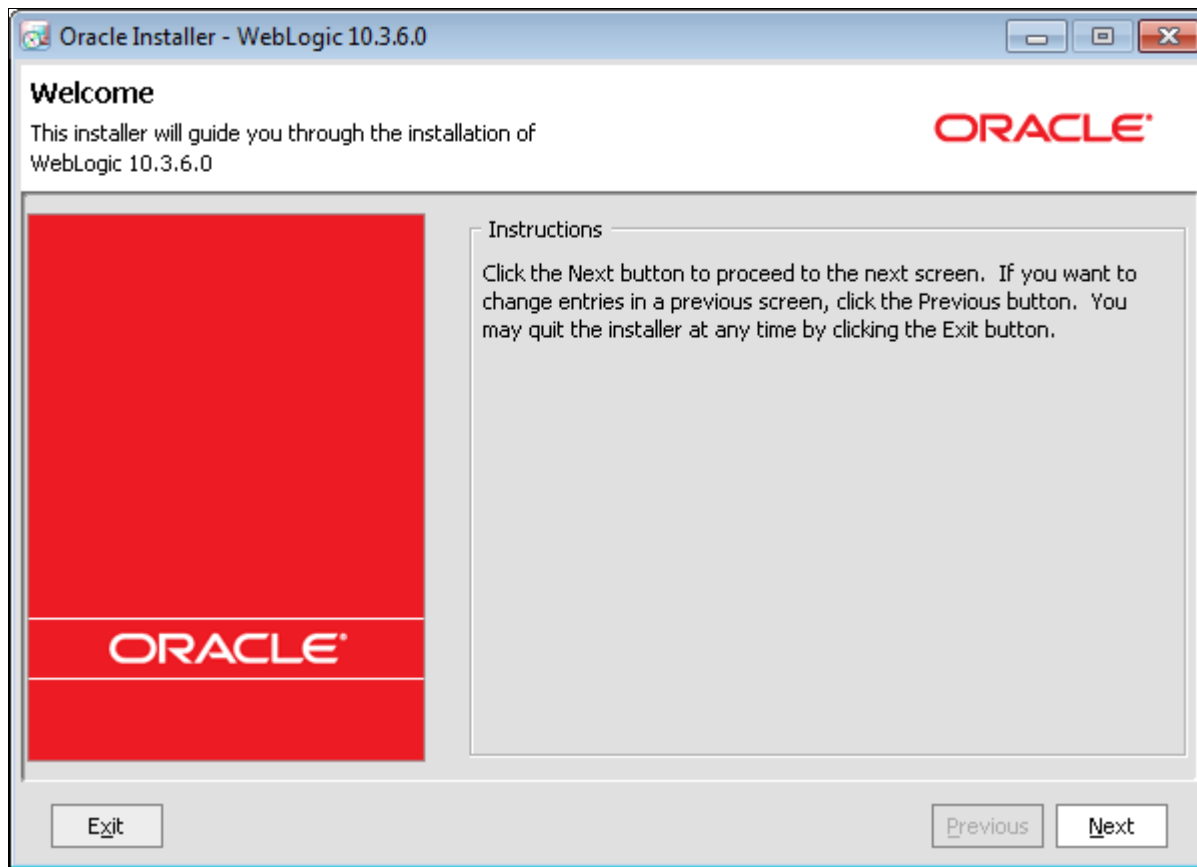
---

1. Download the Oracle WebLogic Server installation files from the Oracle Technology Network.  
See the section Accessing Installation Files earlier in this chapter.

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

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

The Oracle Installer - WebLogic 10.3.6 - Welcome page appears, as shown in the following example:

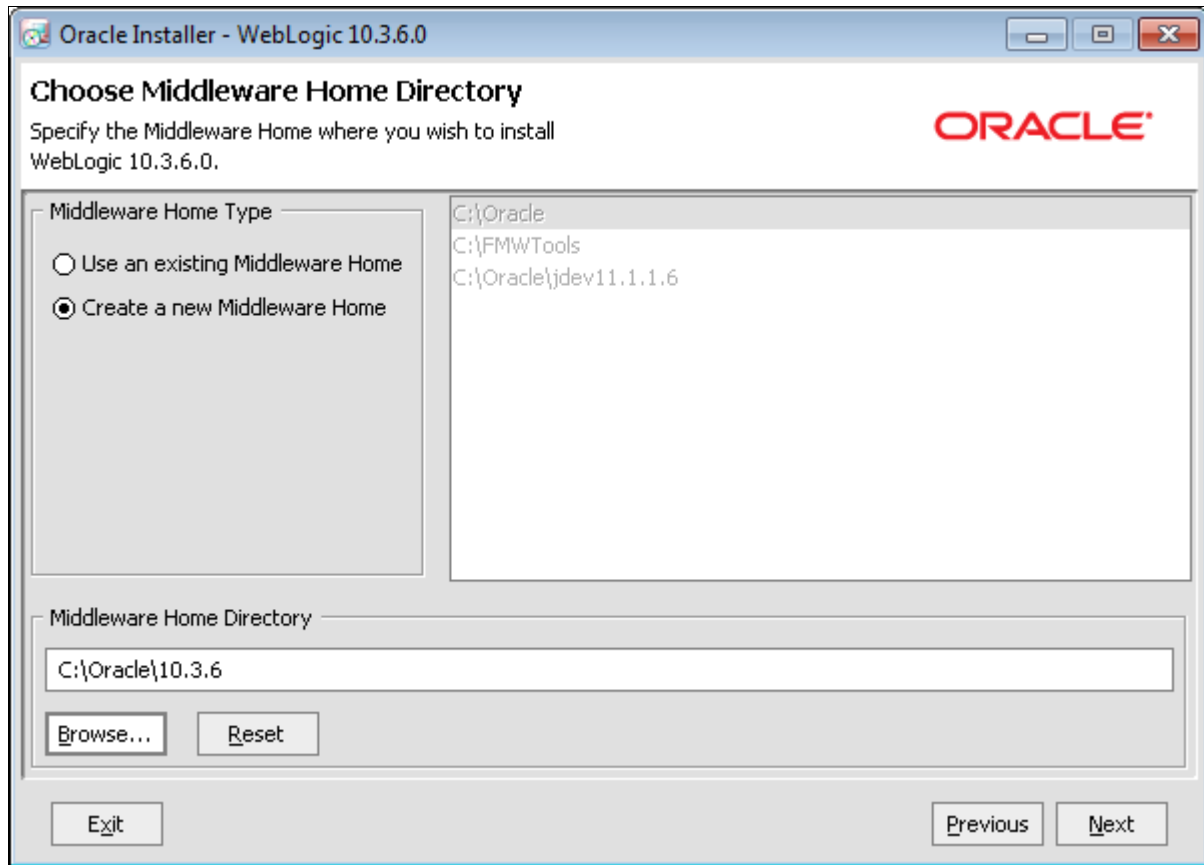


Oracle Installer - WebLogic 10.3.6.0 - Welcome page



3. On the Welcome page, click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Choose Middleware Home Directory page appears, as shown in the following example:

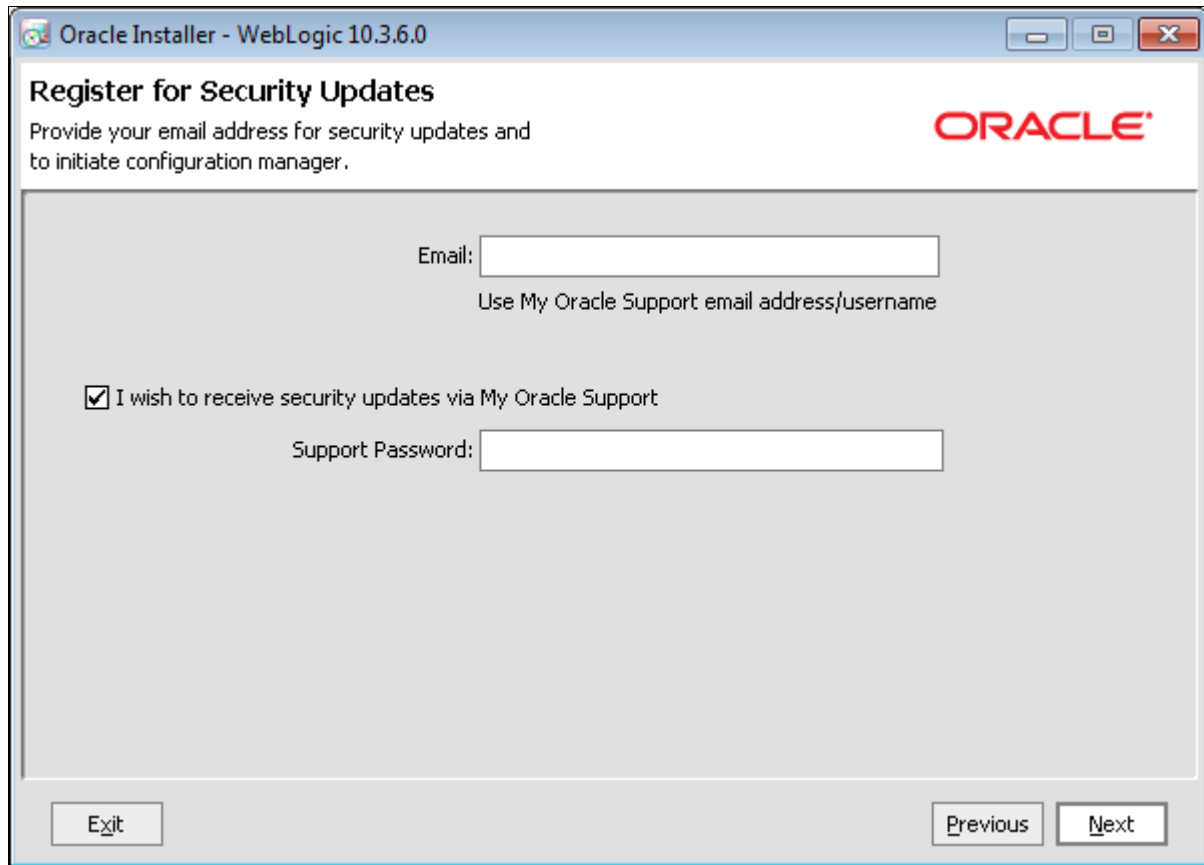


Oracle Installer - WebLogic 10.3.6.0 - Choose Middleware Home Directory page

4. On the Choose Middleware Home Directory page, do the following:
  - Select the option Create a new Middleware Home.
  - In the Middleware Home Directory field, enter a value.  
For example: *C:\Oracle\10.3.6*.

5. Click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Register for Security Updates page appears, as shown in the following example:

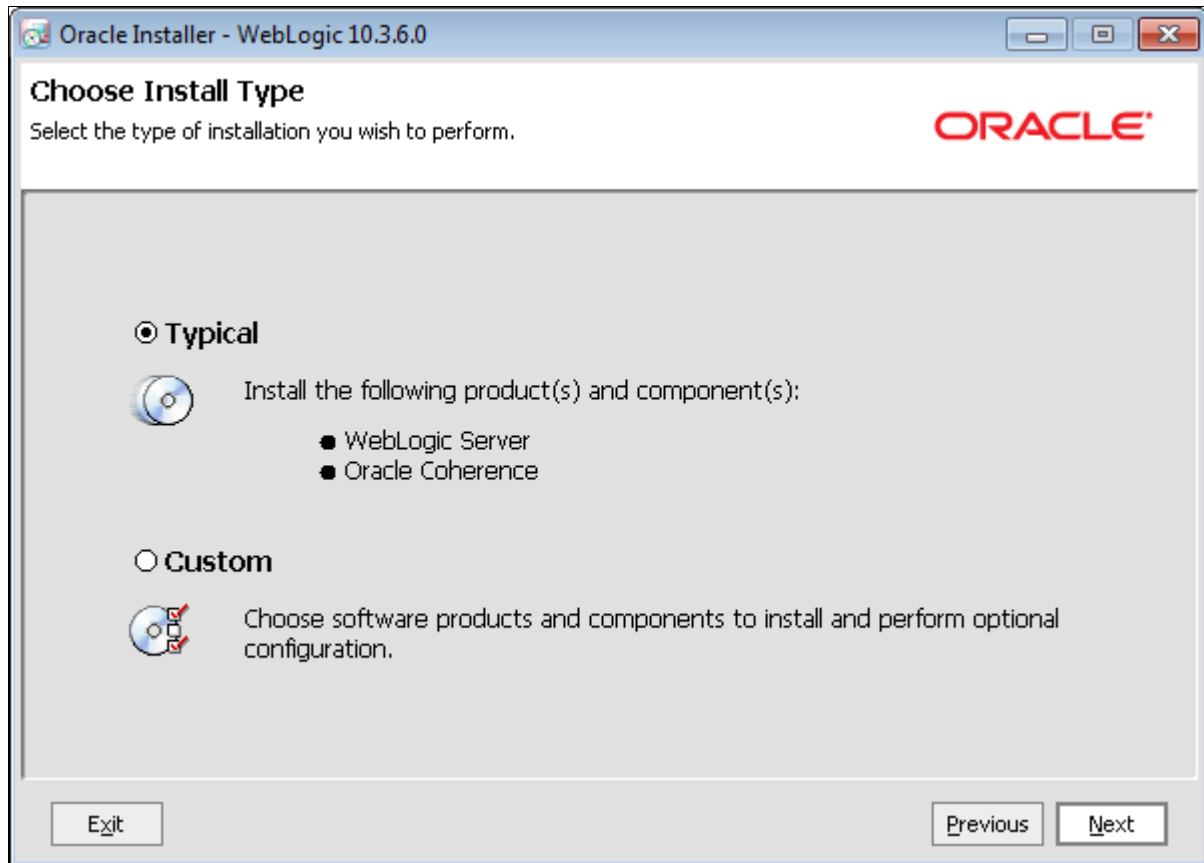


The screenshot shows a window titled "Oracle Installer - WebLogic 10.3.6.0". The main heading is "Register for Security Updates". Below the heading, it says "Provide your email address for security updates and to initiate configuration manager." The Oracle logo is in the top right corner. There is an "Email:" label followed by a text input field. Below the input field, it says "Use My Oracle Support email address/username". There is a checkbox labeled "I wish to receive security updates via My Oracle Support" which is checked. Below the checkbox, there is a "Support Password:" label followed by a text input field. At the bottom left is an "Exit" button. At the bottom right are "Previous" and "Next" buttons.

Oracle Installer - WebLogic 10.3.6.0 - Register for Security Updates page

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

The Oracle Installer - WebLogic 10.3.6.0 - Choose Install Type page appears, as shown in the following example:



Oracle Installer - WebLogic 10.3.6.0 - Choose Install Type page

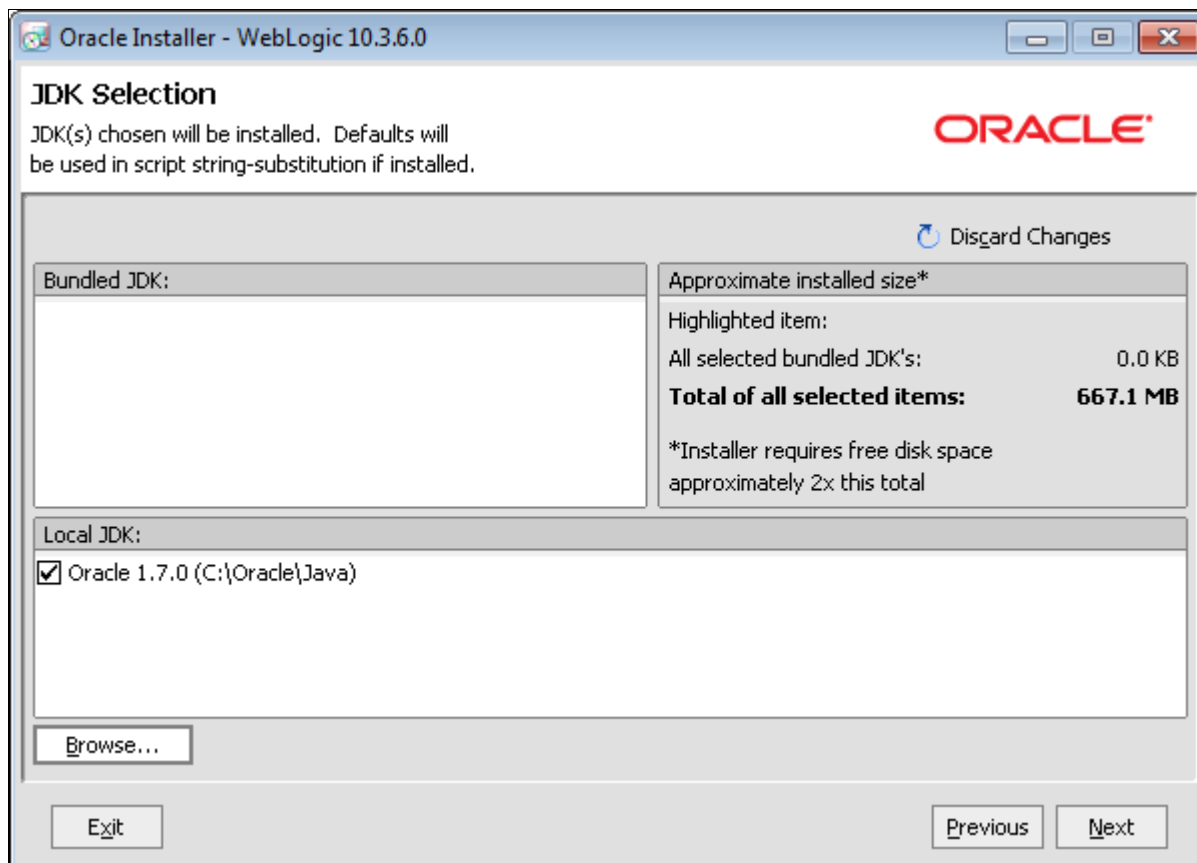
7. On the Choose Install Type page, select the Typical option and then click Next.

The JDK Selection page appears.

The mobile server for PeopleSoft FSCM 9.2 requires JDK7 to support the required Java version for PeopleSoft PeopleTools. Select JDK7 from the JDK Selection window.

JDK7 can be downloaded from the following URL:

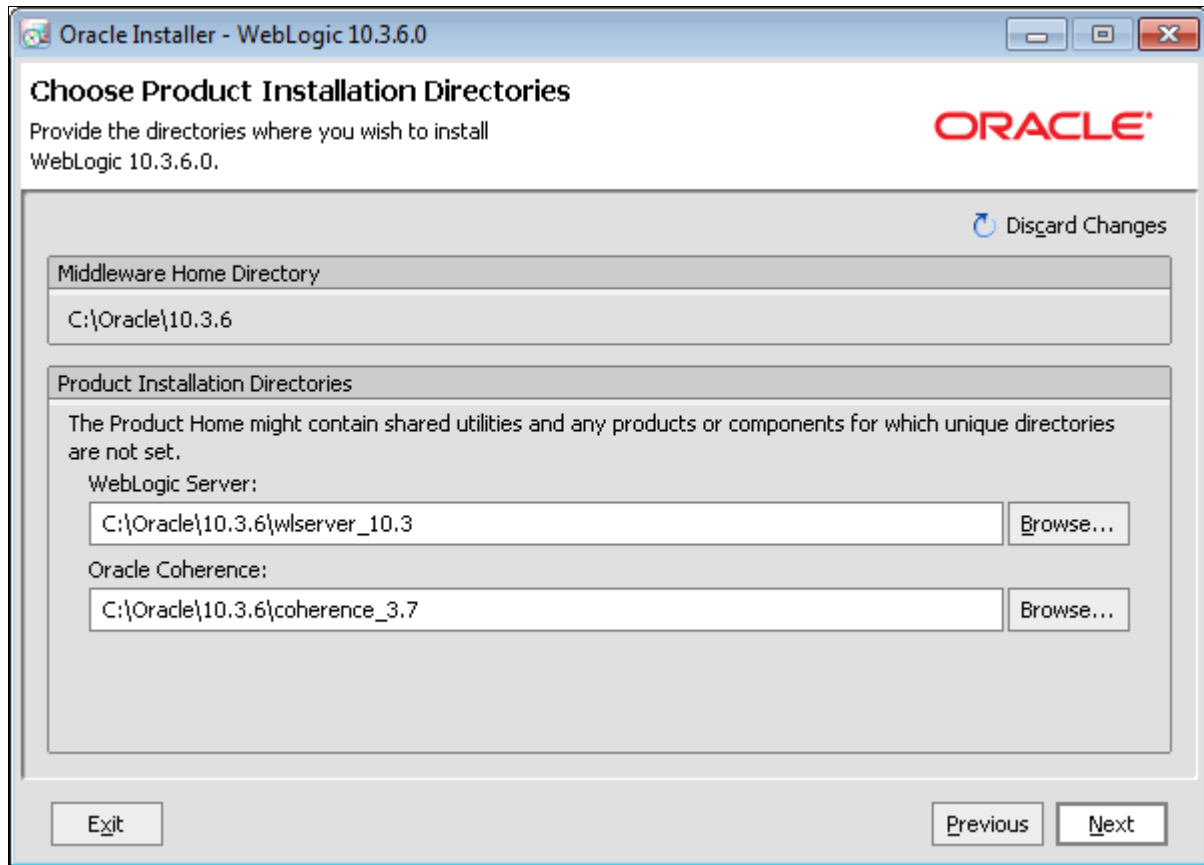
<http://www.oracle.com/technetwork/java/javase/downloads/java-se-jdk-7-download-432154.html>.



Oracle Installer - WebLogic 10.3.6.0 - JDK Selection page

8. After selecting JDK7 in the JDK Selection window, click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Choose Product Installation Directories page appears, as shown in the following example:



Oracle Installer - WebLogic 10.3.6.0 - Choose Product Installation Directories page

9. On the Choose Product Installation Directories page, in the WebLogic Server field, browse to the directories where you want to install Oracle WebLogic and then click Next.

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

---

**Note.** For more information and details about Oracle Coherence and the Oracle WebLogic Server installation, access the complete *Oracle WebLogic Server 10.3.6 Installation* guide from the Oracle Fusion Middleware Documentation Library at: [http://download.oracle.com/docs/cd/E12839\\_01/index.htm](http://download.oracle.com/docs/cd/E12839_01/index.htm).

---

## Task 19-2-2: Starting the Configuration Wizard to Define a New Domain

To start the Configuration Wizard to define a new domain:

1. After installation, you can launch QuickStart (Graphical Interface Only) as follows:  
On Microsoft Windows systems, select Start, Programs, Oracle WebLogic, QuickStart.  
On UNIX systems, do the following:
  - a. Log in to the target UNIX system.
  - b. Go to the /common/bin subdirectory of your installation.

For example: `cd /MW_HOME/wlserver_10.3/common/quickstart.`

- c. Enter the command `sh quickstart.sh`.
- d. For console mode on UNIX, use the Oracle WebLogic Scripting Tool (WLST) to create a Domain.  
See *Oracle WebLogic Server Installation* guide from the Oracle Fusion Middleware Documentation Library at: [http://download.oracle.com/docs/cd/E12839\\_01/index.htm](http://download.oracle.com/docs/cd/E12839_01/index.htm).

---

**Note.** This PeopleSoft Mobile Inventory Management installation chapter only covers the graphical interface.

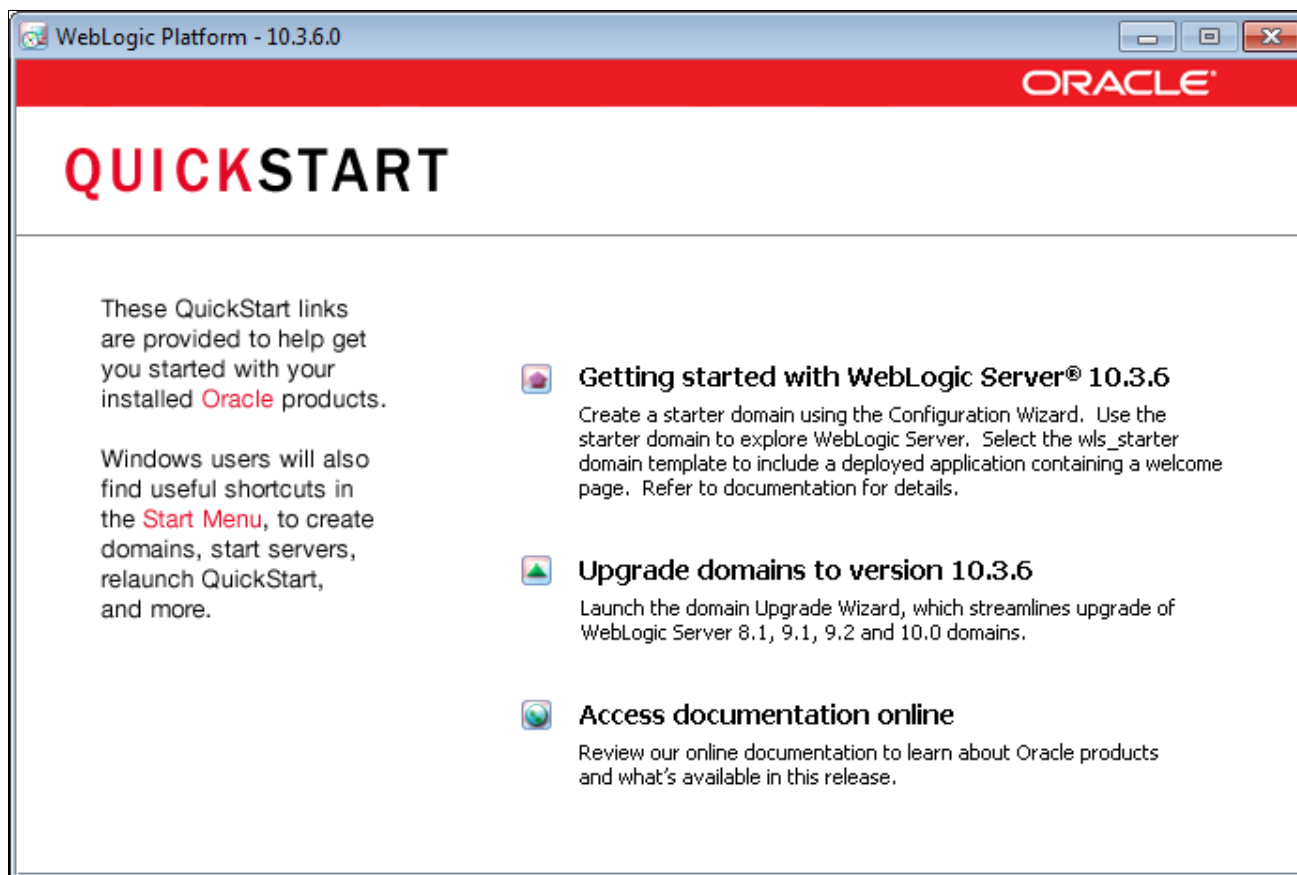
---

2. Use the menu options from the Program Group to select Oracle WebLogic, QuickStart, as shown in the following example:



Accessing Quick Start from Start Menu under Oracle WebLogic

The WebLogic Platform - 10.3.6.0 - QuickStart page appears, as shown in the following example:



WebLogic Platform - 10.3.6.0 - Quick Start page

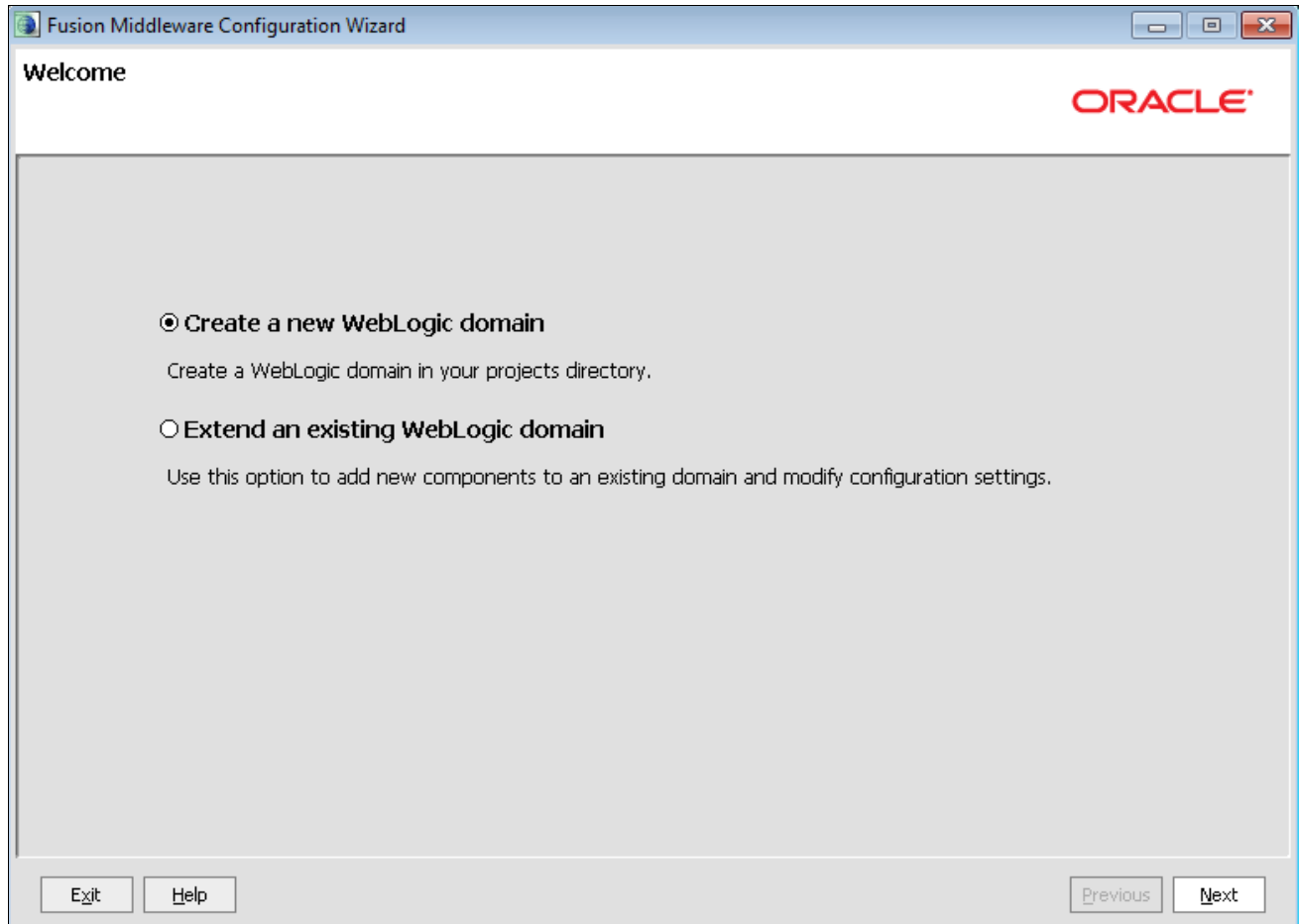
3. On the WebLogic QuickStart page, click the option Getting Started with WebLogic Server 10.3.6 to run the QuickStart Configuration Wizard to define a New Domain, *database\_domain*.

---

**Note.** If you plan to run multiple domains, you can use *database* as part of the name when you define your domain name.

---

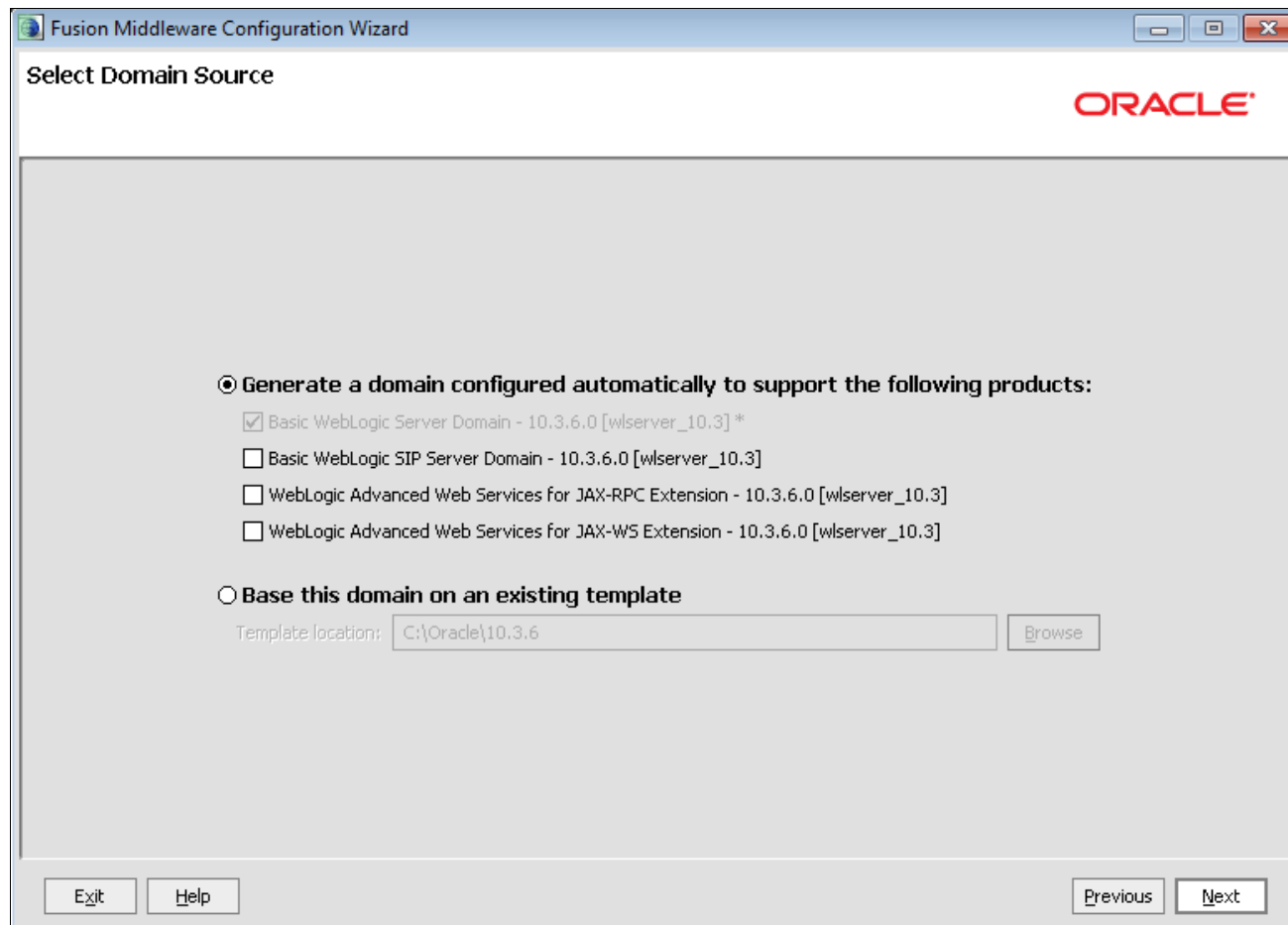
The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Welcome page

4. On the Welcome page, select the option Create a new WebLogic domain. Click Next.

The Fusion Middleware Configuration Wizard - Select Domain Source page appears, as shown in the following example:



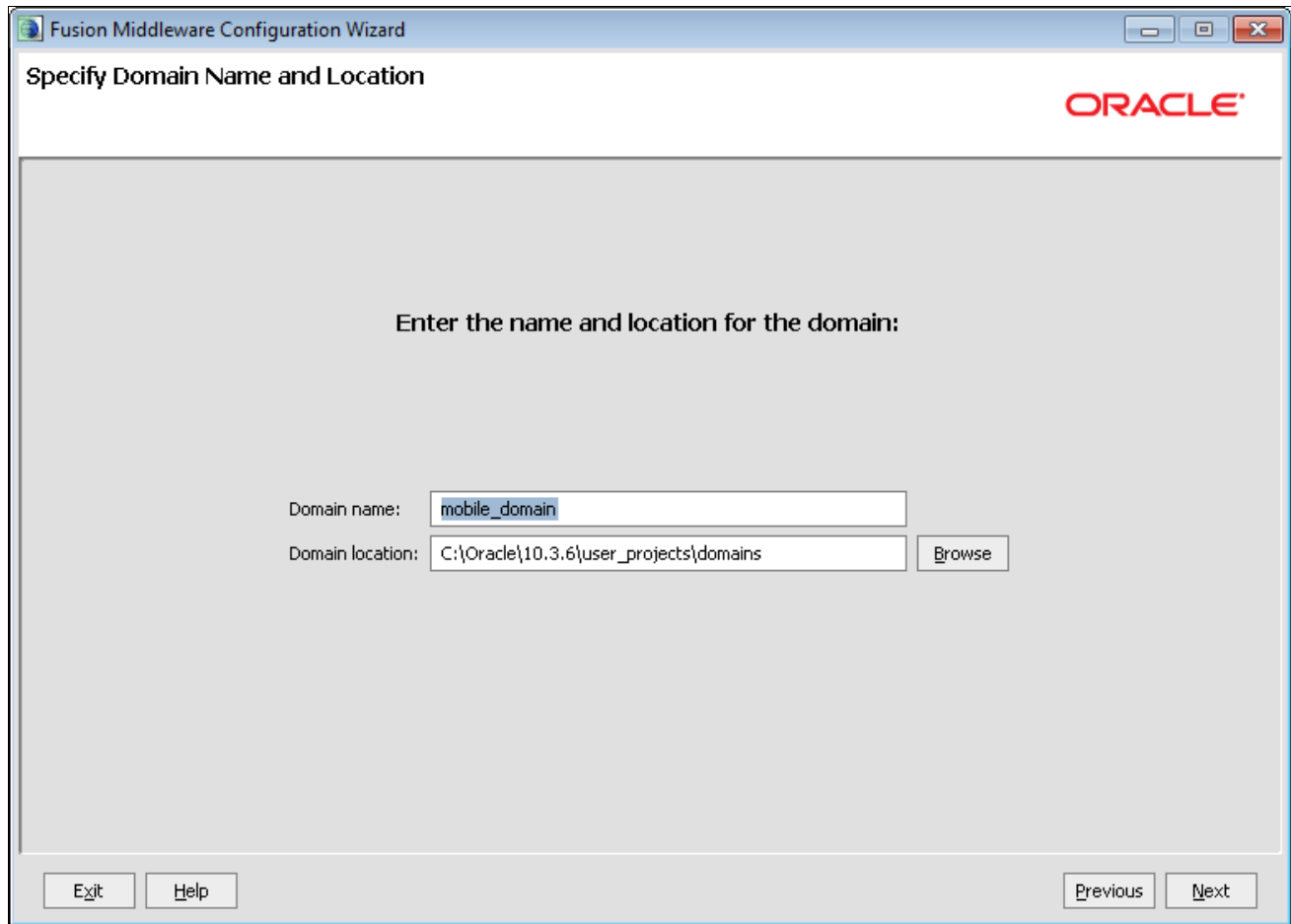
Fusion Middleware Configuration Wizard - Select Domain Source page

5. On the Select Domain Source page, do the following:
- Select the option Generate a domain configured automatically to support the following products.
  - Select the option Basic WebLogic SIP Server Domain - 10.3.6 [wlserver\_10.3].



6. Click Next.

The Fusion Middleware Configuration Wizard - Specify Domain Name and Location page appears, as shown in the following example:



The screenshot shows a window titled "Fusion Middleware Configuration Wizard" with a subtitle "Specify Domain Name and Location". The Oracle logo is in the top right corner. The main area contains the instruction "Enter the name and location for the domain:". Below this, there are two input fields: "Domain name:" with the text "mobile\_domain" and "Domain location:" with the text "C:\Oracle\10.3.6\user\_projects\domains". A "Browse" button is next to the domain location field. At the bottom, there are four buttons: "Exit", "Help", "Previous", and "Next".

Fusion Middleware Configuration Wizard - Specify Domain Name and Location page

7. On the Specify Domain Name and Location page, change the default domain name and location to specify *your* domain name and location. Click Next.

---

**Important!** Be sure to make note of your domain name and location. This information is required in later steps.

---

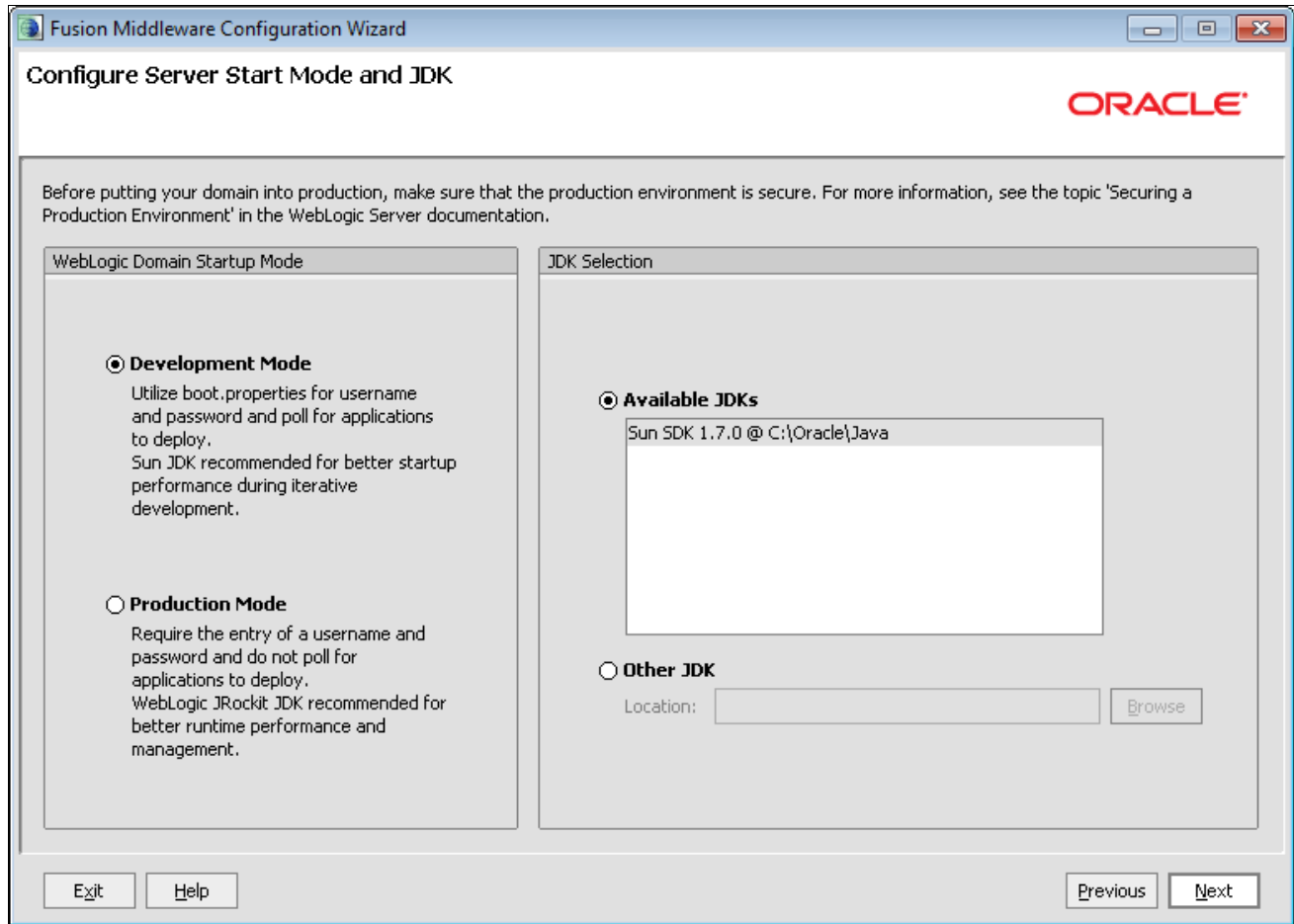
The Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page appears, as shown in the following example:

The screenshot shows a window titled "Fusion Middleware Configuration Wizard" with a sub-header "Configure Administrator User Name and Password" and the Oracle logo. A "Discard Changes" button is in the top left. The main area contains four input fields: "\*Name:" with the value "weblogic", "\*User password:" with masked text "\*\*\*\*\*", "\*Confirm user password:" with masked text "\*\*\*\*\*", and "Description:" with the text "This user is the default administrator.". At the bottom are buttons for "Exit", "Help", "Previous", and "Next".

Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page

8. On the Configure Administrator User Name and Password page, enter your user name and password. Click Next.

The Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page

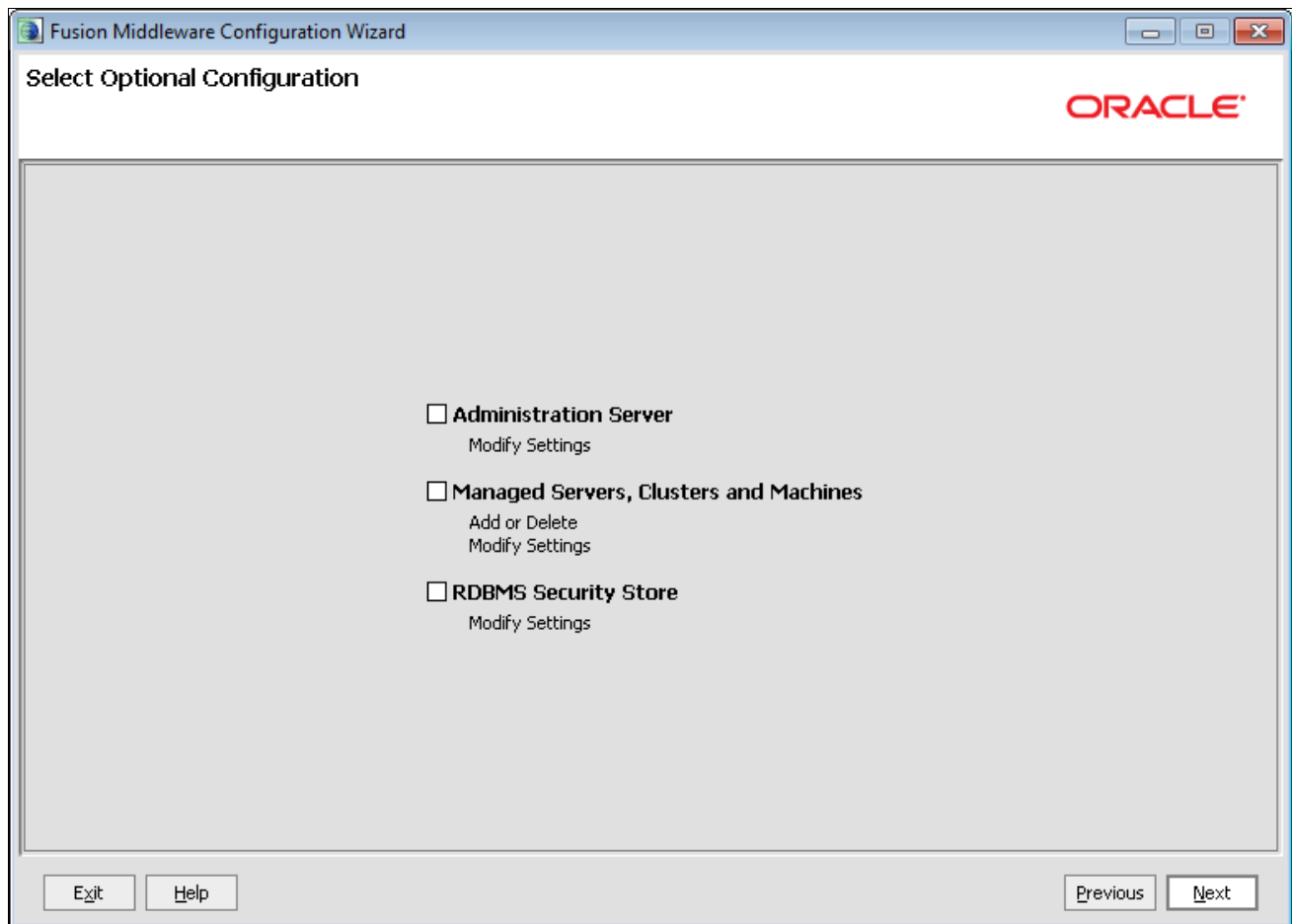
---

**Note.** Make sure you select JDK7 during the mobile server domain creation. PeopleTools requires JDK7 for mobile authentication security. If JDK7 is not selected, then users cannot log in to mobile application after the deployment. The tools will fail to authenticate the user at the time of login.

---

9. On the Configure Server Start Mode and JDK page, accept the default options Development Mode and Available JDKs, and click Next.

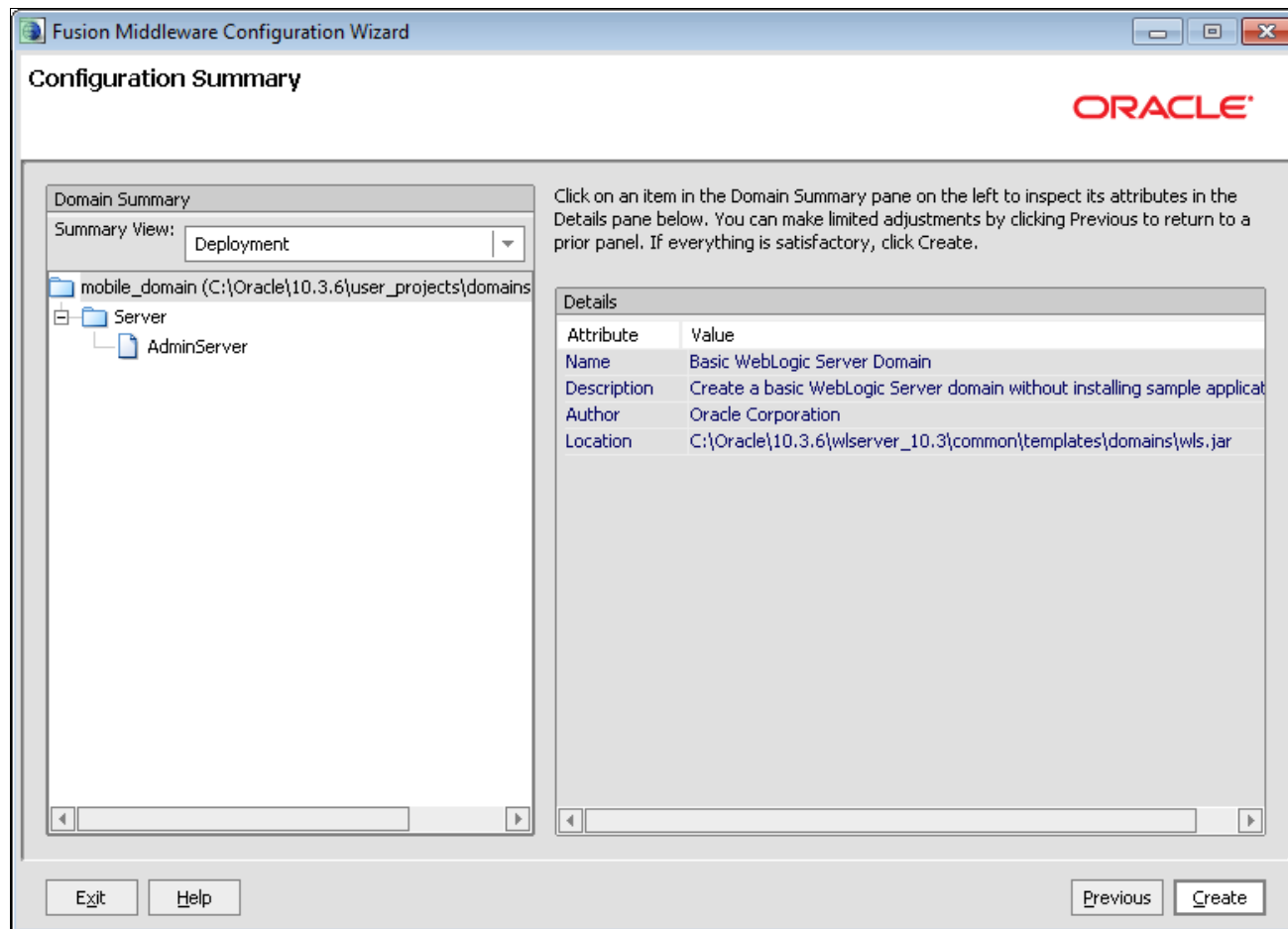
The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

10. The Select Optional Configuration page requires no action. Click Next.

Click Next until you reach the Fusion Middleware Configuration Wizard - Configuration Summary page, as shown in the following example:



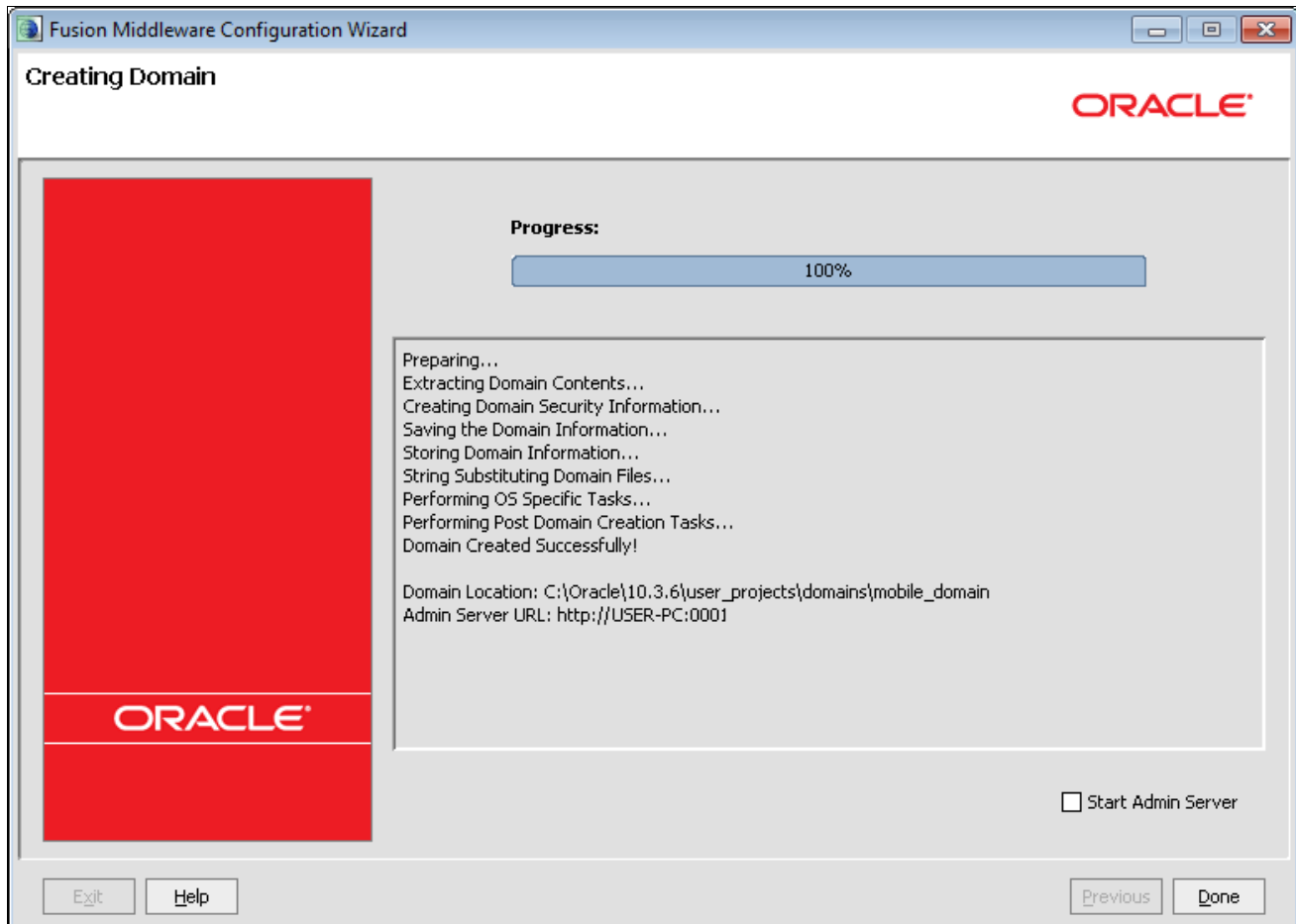
Fusion Middleware Configuration Wizard - Configuration Summary page

11. On the Configuration Summary page, click an item in the Domain Summary pane on the left to review your configuration details.

If you need to make corrections, click the Previous button and modify your details.

12. After you confirm and adjust the configuration details, click the Create button.

The Fusion Middleware Configuration Wizard - Creating Domain page appears showing the domain creation progress, as shown in the following example:



Fusion Middleware Configuration Wizard - Creating Domain progress page

13. On the Creating Domain progress page, when the domain creation progress reaches 100%, click the Done button.

## Task 19-3: Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

---

This section discusses:

- Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Installing the Oracle Application Development Runtime Installer
- Configuring Components Using the Configuration Wizard
- Starting the Administration Server

## Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

This task discusses the Oracle Application Development Runtime Installer for use with PeopleSoft Mobile Inventory Management. You must configure and activate the Oracle WebLogic Server to pass data between PeopleSoft and mobile devices.

See Installing the Oracle WebLogic Server for Mobile.

---

**Note.** Oracle Application Development Runtime Installer requires a graphical environment. To run the installation program in graphical mode, the console attached to the machine on which you are installing the software must support a Java-based GUI. All consoles for Microsoft Windows systems support Java-based GUIs, but not all consoles for UNIX systems do.

---

The system requires a Java-enabled web server to extend the PeopleSoft architecture to the internet and intranet. When you install the PeopleSoft Pure Internet Architecture on the web server, you install a collection of PeopleSoft Java servlets that handle a wide range of PeopleSoft transactions originating from the internet or intranet. PeopleSoft PeopleTools provides and supports the Oracle WebLogic Server for use within your PeopleSoft implementation.

Oracle WebLogic is a server software application that runs on a middle-tier between back-end databases (in this case, the PeopleSoft database) and related applications and browser-based thin clients (in this case, mobile devices). The Oracle WebLogic Server supports the Oracle Application Development Runtime and the Application Developer Mobile browser that extends Oracle Application Development Runtime to browsers running on mobile devices. The following steps detail a *general* installation of the Oracle Application Development Runtime for PeopleSoft Mobile Inventory Management.

---

**Note.** You only install the Oracle Application Development Runtime one time per Oracle WebLogic Server installation.

---

### Task 19-3-1: Installing the Oracle Application Development Runtime Installer

To install the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management:

---

**Note.** You can access the complete installation guide for the Oracle Application Developer 11.1.1.6 or 11.1.1.7 from the Oracle Fusion Middleware Documentation Library at:

[http://download.oracle.com/docs/cd/E12839\\_01/index.htm](http://download.oracle.com/docs/cd/E12839_01/index.htm)

---

1. Download the Oracle Application Development Runtime Installer from the Oracle Technology Network as described previously.

See the section Accessing Installation Files earlier in this chapter.

2. Start the installer by going to the directory where you unpacked the archive file and switch to the Disk1 directory.

- On UNIX operating systems:

```
cd unpacked_archive_directory/Disk1 ./runInstaller -jreLoc JRE_LOCATION
```

- On Microsoft Windows operating systems:

```
cd unpacked_archive_directory\Disk1 setup.exe -jreLoc JRE_LOCATION
```

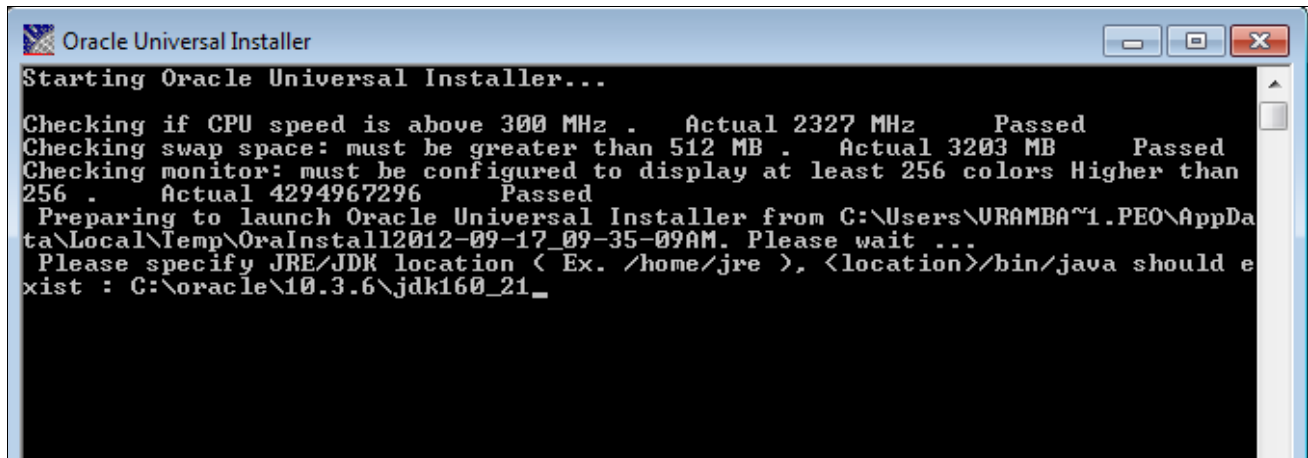
This starts the Installation Wizard, and the Oracle Universal Installer command window appears.

3. In the command window, enter your JDK directory (if you did not use the `-jreLoc` parameter when launching the installer).

For example: `C:\Oracle\10.3.6\jdk170_13`.

**Note.** If you are installing on a 64-bit server, you must download and install the appropriate 64-bit Java from [www.java.com](http://www.java.com) before you proceed with this installation. Refer the section titled Prerequisites at the beginning of this chapter.

The following example shows the Oracle Universal Installer command window with the JDK directory:

A screenshot of a Windows command window titled "Oracle Universal Installer". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The command prompt shows the following text:

```
Starting Oracle Universal Installer...

Checking if CPU speed is above 300 MHz .   Actual 2327 MHz       Passed
Checking swap space: must be greater than 512 MB .   Actual 3203 MB       Passed
Checking monitor: must be configured to display at least 256 colors Higher than
256 .   Actual 4294967296       Passed
Preparing to launch Oracle Universal Installer from C:\Users\URAMBA~1\PEO\AppData
ta\Local\Temp\OraInstall2012-09-17_09-35-09AM. Please wait ...
Please specify JRE/JDK location < Ex. /home/jre >, <location>/bin/java should e
xist : C:\oracle\10.3.6\jdk160_21_
```

Oracle Universal Installer command window with JDK directory

The Oracle Fusion Middleware 11g Application Developer Installation - Welcome page appears (Step 1 of 8), as shown in the following example:





Oracle Fusion Middleware 11g Application Developer Installation: Welcome page

4. On the Welcome page, click Next.

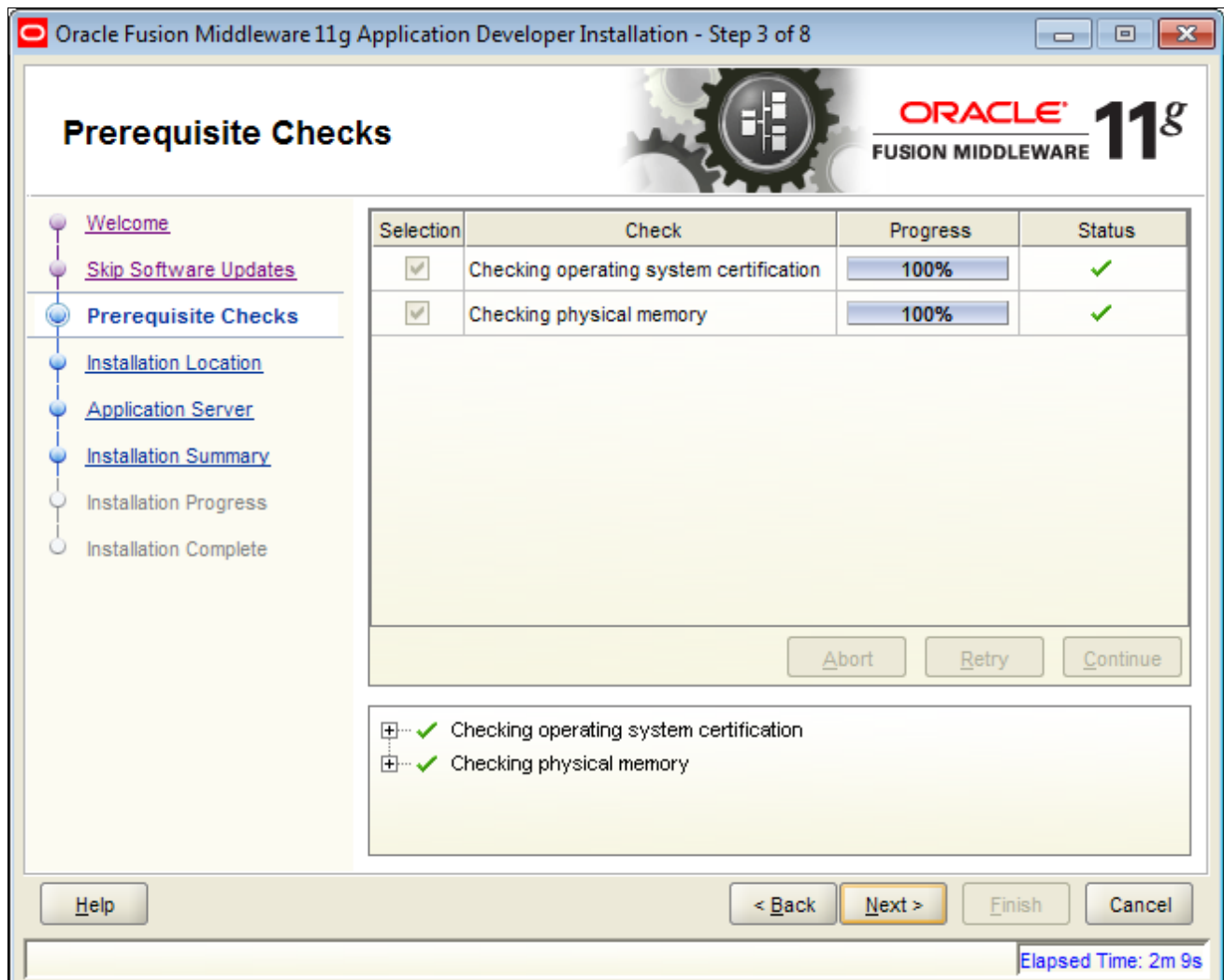
The Oracle Fusion Middleware Application Developer Installation - Install Software Updates page (Step 2 of 8) appears, as shown in the following example:

The screenshot shows a window titled "Oracle Fusion Middleware 11g Application Developer Installation - Step 2 of 8". The main heading is "Install Software Updates". On the left is a navigation pane with a vertical list of steps: Welcome, Skip Software Updates (highlighted with a blue circle), Prerequisite Checks, Installation Location, Application Server, Installation Summary, Installation Progress, and Installation Complete. The main content area has three radio button options: "Skip Software Updates" (selected), "Search My Oracle Support for Updates", and "Search Local Directory for Updates". Under "Search My Oracle Support for Updates" are fields for "User Name:" and "Password:", and buttons for "Proxy Settings" and "Test Connection". Under "Search Local Directory for Updates" is a "Local Directory:" field with a "Browse" button and a "Search For Updates" button. At the bottom are buttons for "Help", "< Back", "Next >", "Finish", and "Cancel". A status bar at the bottom right shows "Elapsed Time: 1m 34s".

Oracle Fusion Middleware 11g Application Developer Installation: Install Software Updates page

5. On the Install Software Updates page, select the option Skip Software Updates. Click Next.

The Oracle Fusion Middleware Application Developer Installation - Prerequisite Checks page (Step 3 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Prerequisite Checks page

6. On the Prerequisite Checks page, click Next.

The Oracle Fusion Middleware Application Developer Installation - Specify Installation Location page (Step 4 of 8) appears, as shown in the following example:

The screenshot shows the 'Specify Installation Location' window for Oracle Fusion Middleware 11g Application Developer Installation, Step 4 of 8. The window has a title bar with the Oracle logo and the text 'Oracle Fusion Middleware 11g Application Developer Installation - Step 4 of 8'. The main content area is divided into two sections. The left section contains a vertical navigation pane with links: 'Welcome', 'Skip Software Updates', 'Prerequisite Checks', 'Installation Location' (highlighted with a blue circle), 'Application Server', 'Installation Summary', 'Installation Progress', and 'Installation Complete'. The right section contains the main configuration area. It has a heading 'Specify Installation Location' and the Oracle 11g logo. Below the heading, there are two input fields: 'Oracle Middleware Home:' with a text box containing 'C:\Oracle\10.3.6' and a 'Browse' button, and 'Oracle Home Directory:' with a text box containing 'oracle\_common'. Below these fields, there is a text box with the message: 'The Oracle home will be created under the Oracle Middleware Home location with the given name.' At the bottom of the window, there is a navigation bar with buttons: 'Help', '< Back', 'Next >', 'Finish', and 'Cancel'. In the bottom right corner, there is a status bar showing 'Elapsed Time: 2m 44s'.

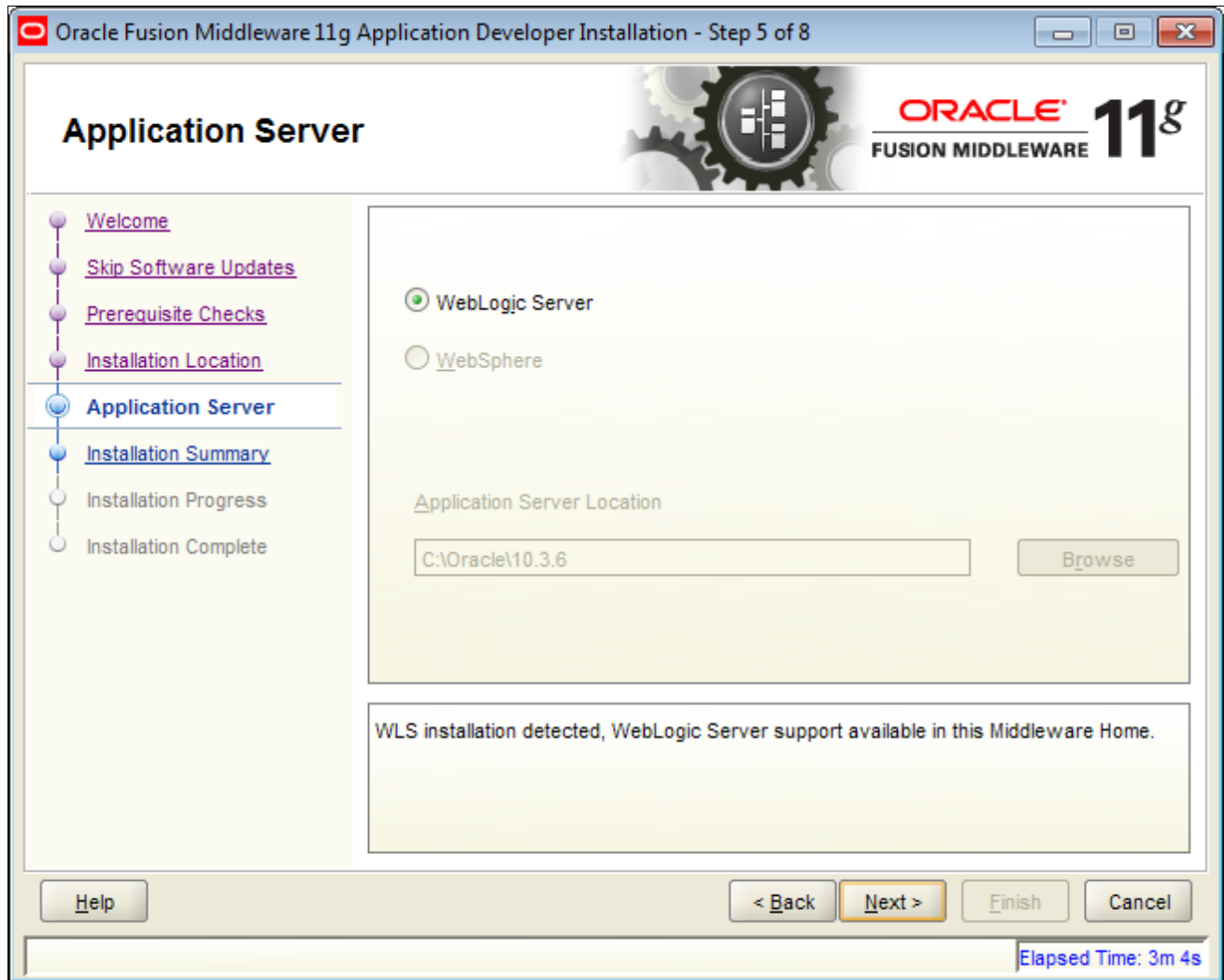
Oracle Fusion Middleware 11g Application Developer Installation: Specify Installation Location page

7. On the Specify Installation Location page, in the Oracle Middleware Home field, enter your Middleware Home location where the Oracle WebLogic Server is installed.

For example: *C:\Oracle\10.3.6*

## 8. Click Next.

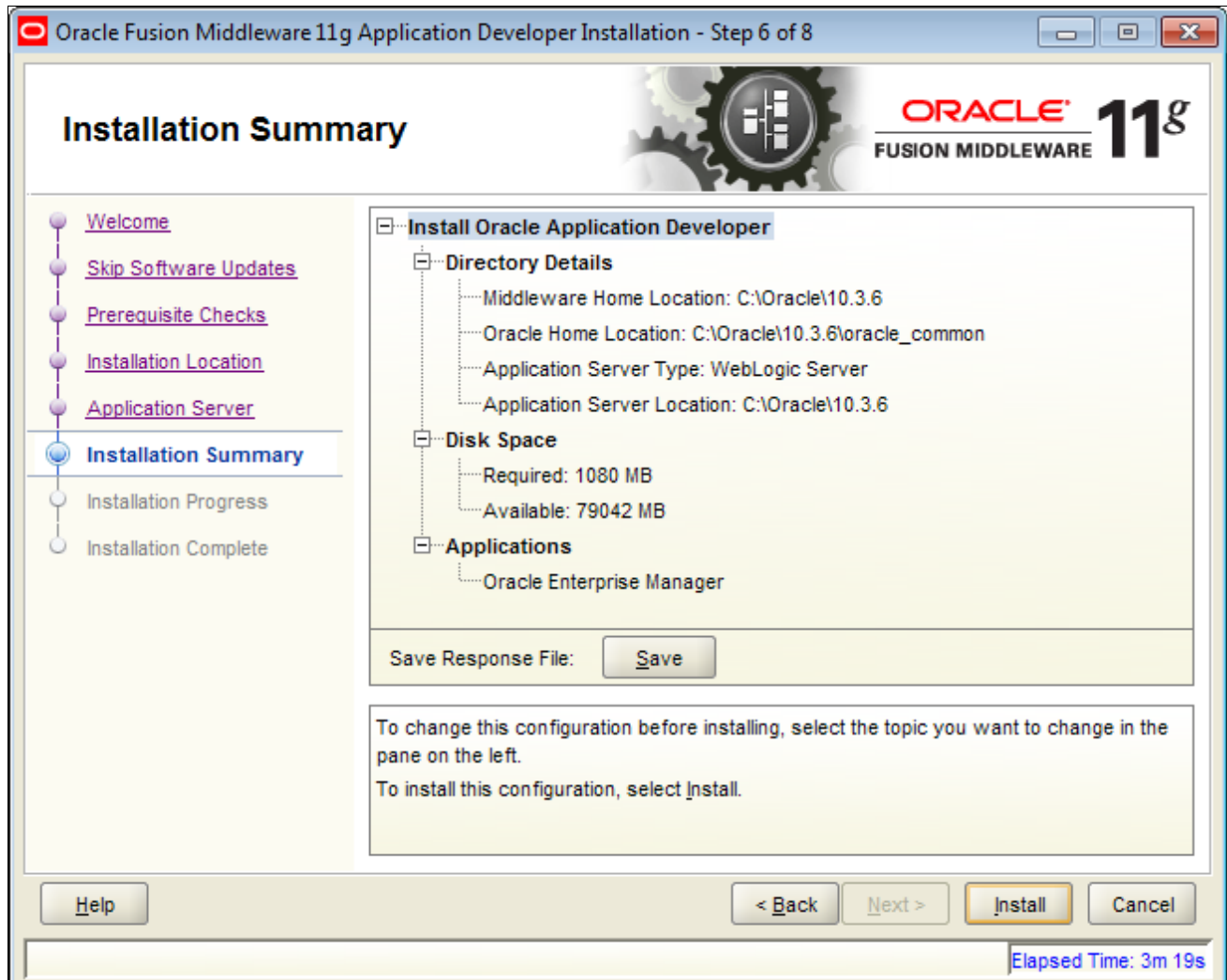
The Oracle Fusion Middleware Application Developer Installation - Application Server page (Step 5 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Application Server page

9. On the Application Server page, click Next.

The Oracle Fusion Middleware Application Developer Installation - Installation Summary page (Step 6 of 8) appears, as shown in the following example:

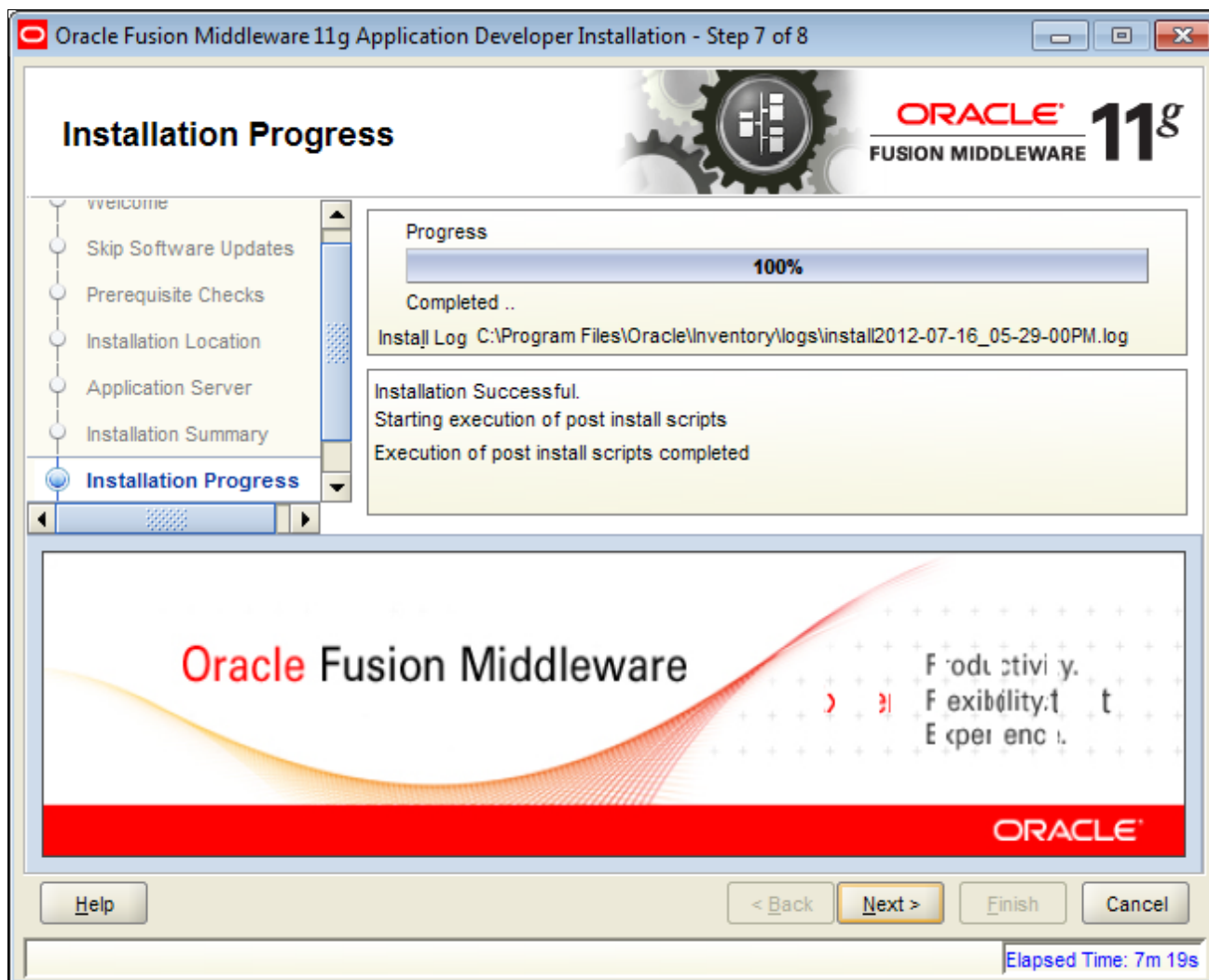


Oracle Fusion Middleware 11g Application Developer Installation: Installation Summary page

10. On the Installation Summary page, review your installation details and then click the Install button.

If you need to make a correction, click the Back button and modify your details.

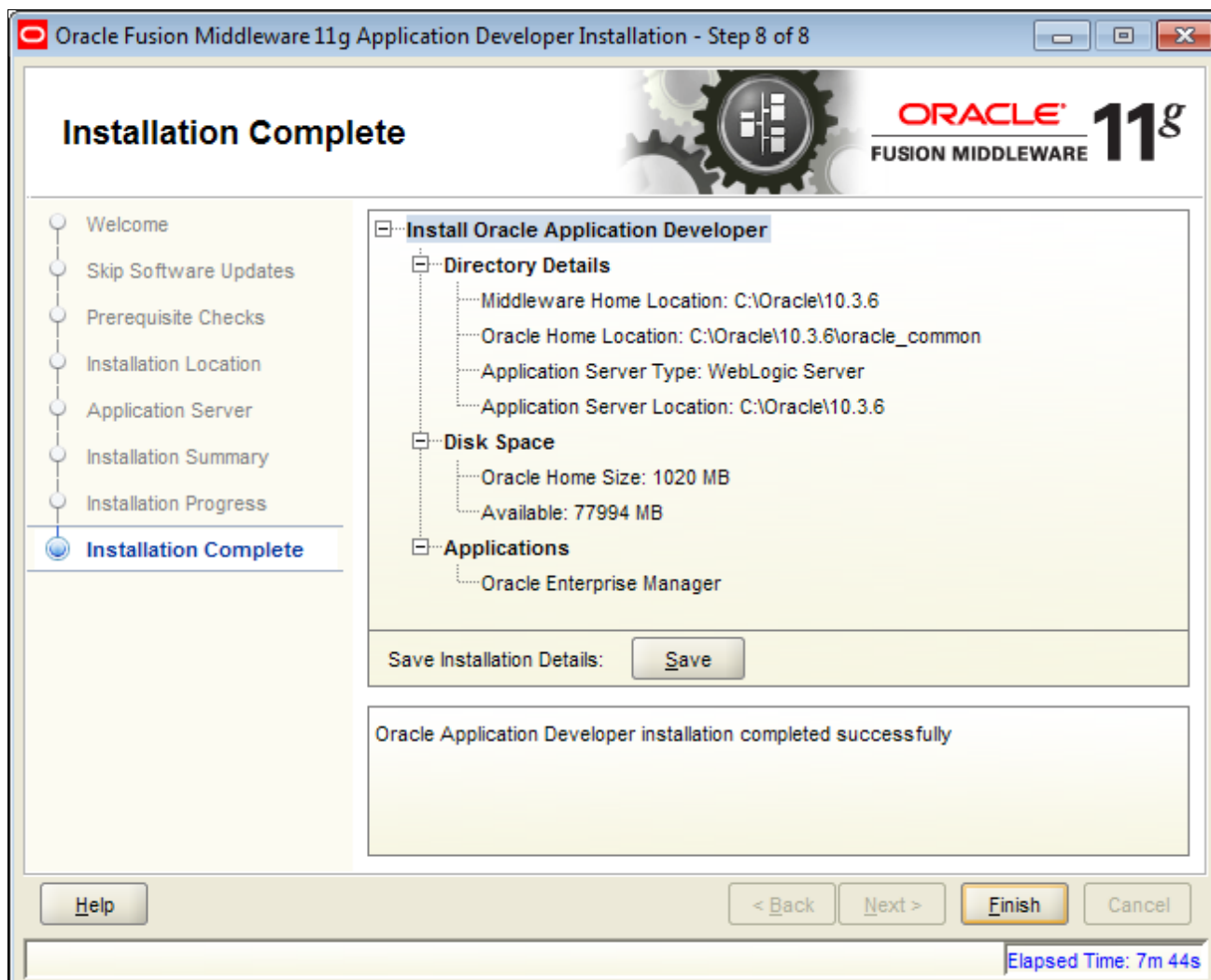
The Oracle Fusion Middleware Application Developer Installation - Installation Progress page (Step 7 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Installation Progress page

11. When the installation progress reaches 100%, click the Next button.

12. Click Next until the Oracle Fusion Middleware Application Developer Installation - Installation Complete page (Step 8 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Installation Complete page

13. On the Installation Complete page, click Finish.

### Task 19-3-2: Configuring Components Using the Configuration Wizard

After the installation is complete, you can configure the components using the Fusion Middleware Configuration Wizard. The Configuration Wizard is located in the common/bin directory inside the product Oracle home.

To configure components using the Fusion Middleware Configuration Wizard:



1. Start the Configuration Wizard by navigating to the directory as follows:

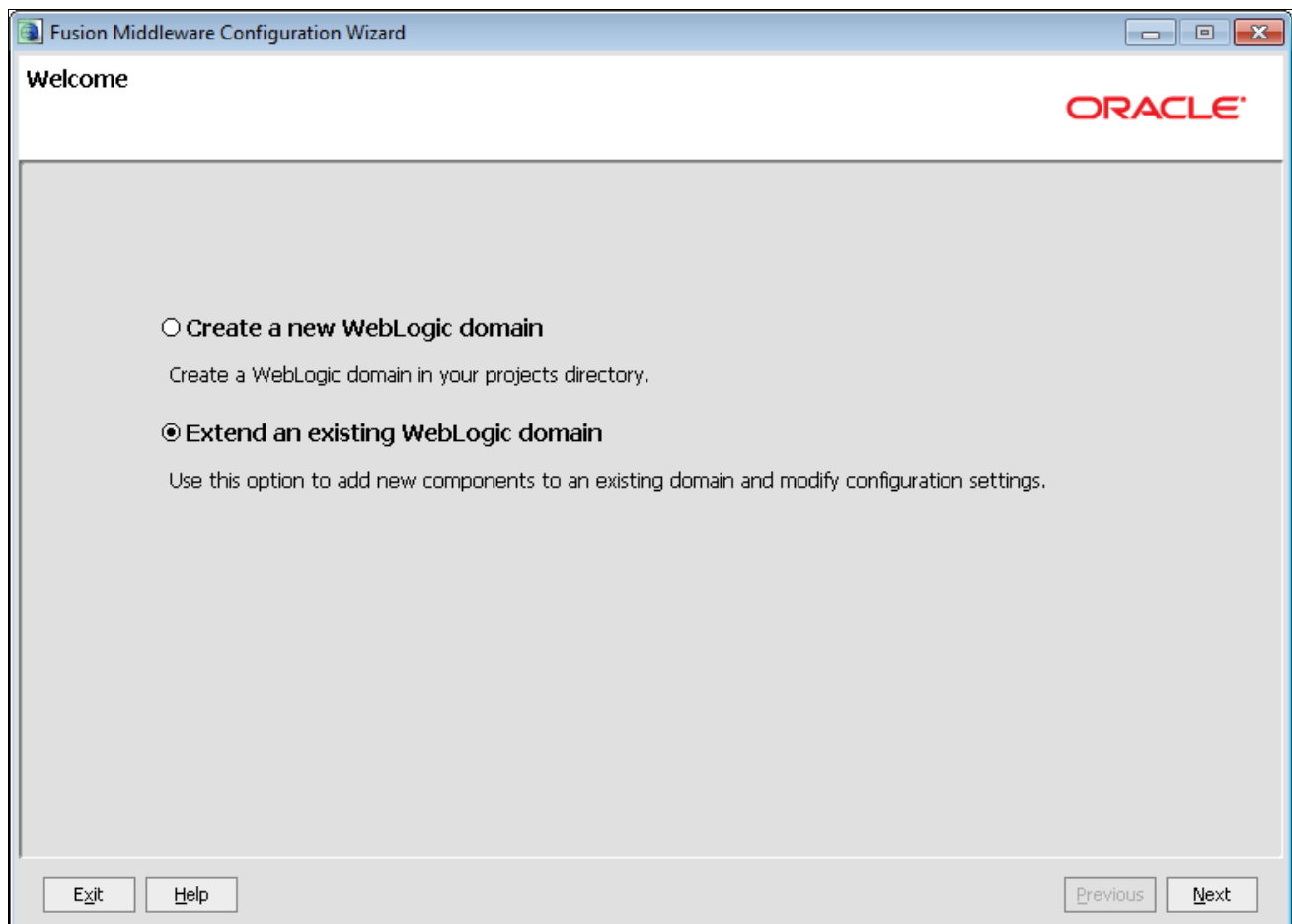
On UNIX operating systems:

```
cd MW_HOME/oracle_common/common/bin  
  
. config.sh
```

On Microsoft Windows operating systems:

```
cd MW_HOME\oracle_common\common\bin  
  
config.cmd
```

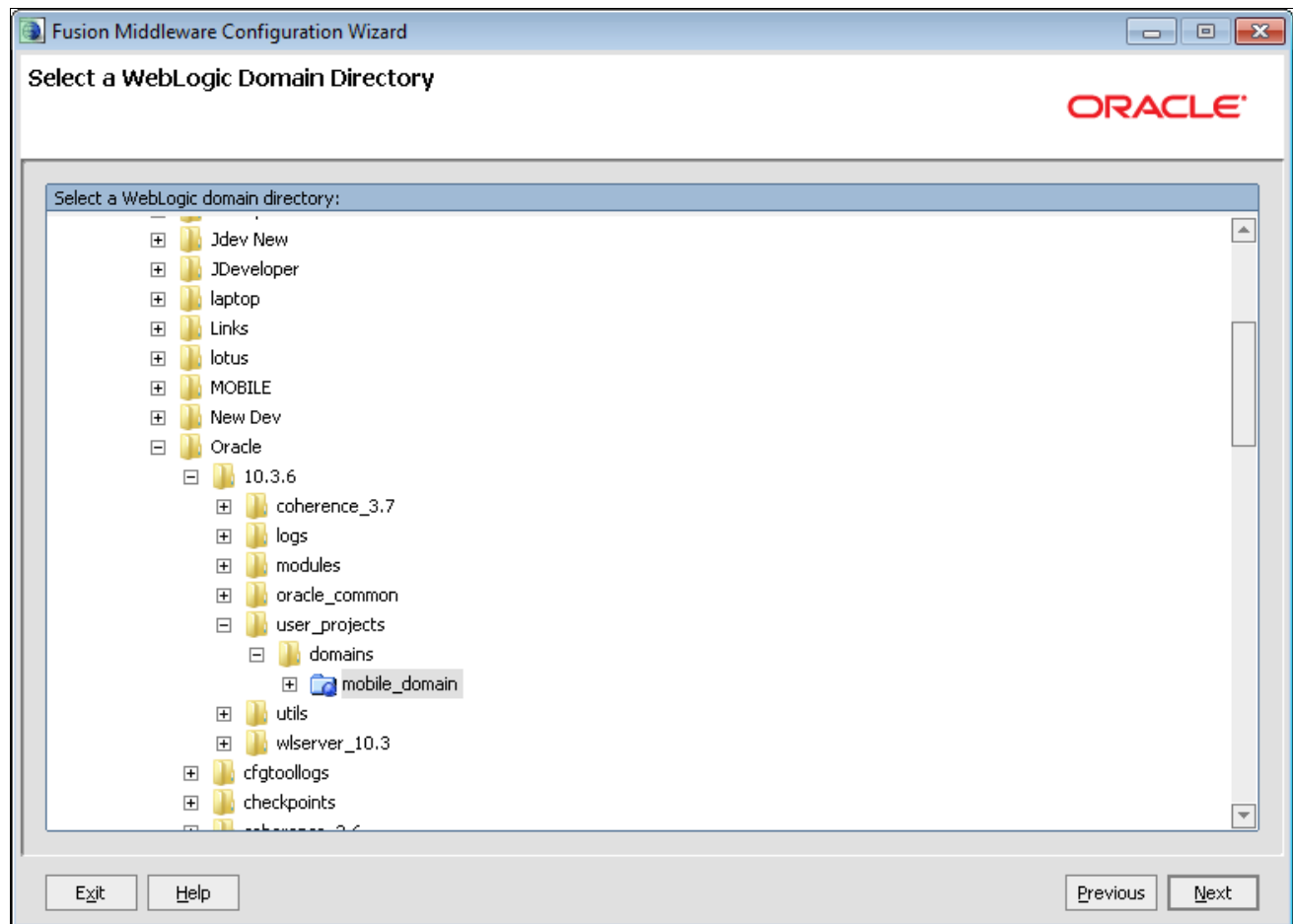
The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Welcome page

2. On the Welcome page, select the option Extend an existing WebLogic domain and click Next.

The Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page appears, as shown in the following example:



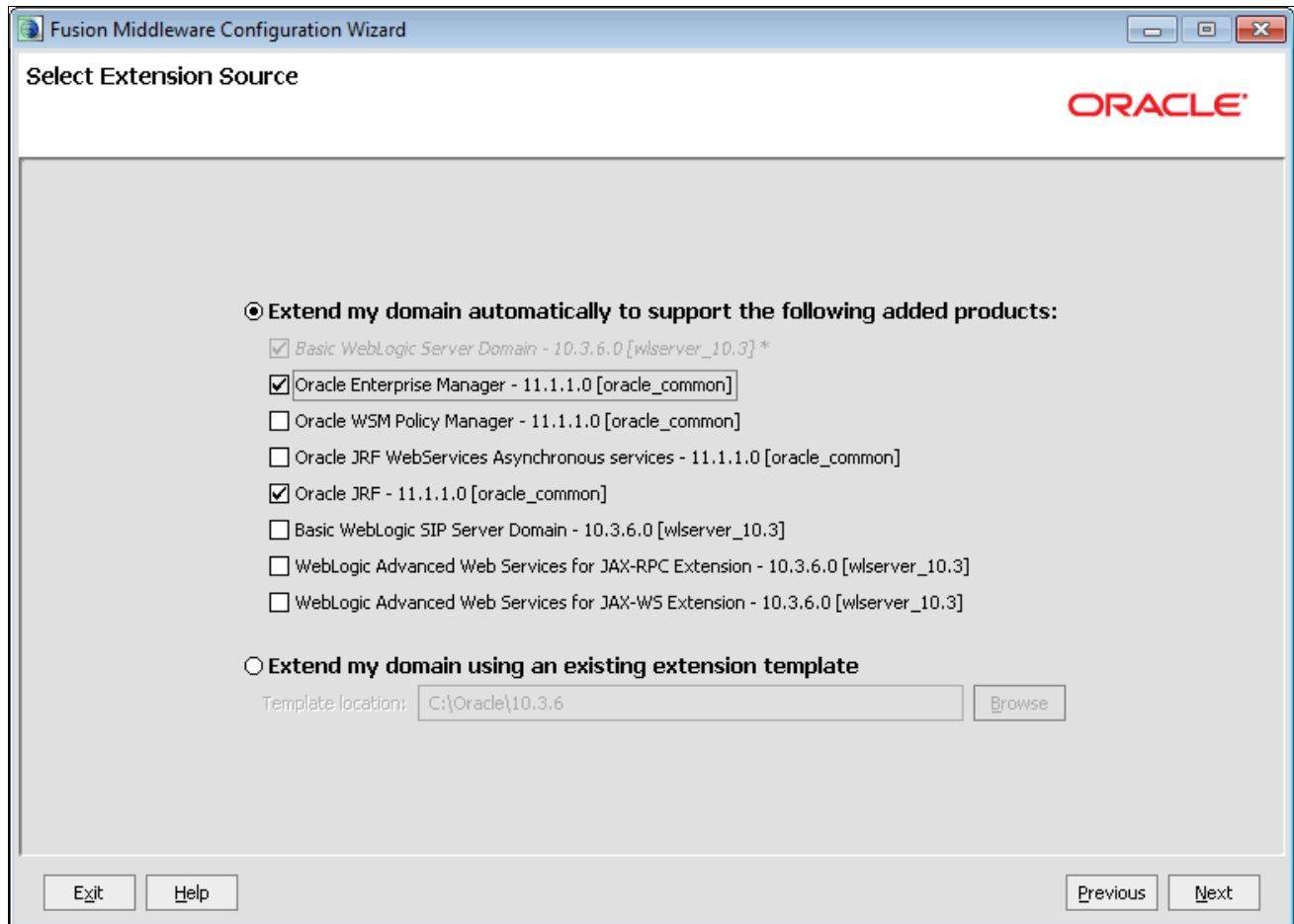
Fusion Middleware Configuration Wizard: Select a Weblogic Domain Directory page

3. On the Select a WebLogic Domain Directory page, select your Target Domain.

For example: Mobile\_Domain.

## 4. Click Next.

The Fusion Middleware Configuration Wizard - Select Extension Source page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Select Extension Source page

## 5. On the Select Extension Source page, do the following:

- Select the option Extend my domain automatically to support the following added products.
- Select the Oracle Enterprise Manager - 11.1.1.0 [oracle\_common] check box.
- Select the Oracle JRF - 11.1.1.0 [oracle\_common] check box.

6. Click Next.

The Fusion Middleware Configuration Wizard - Specify Domain Name and Location page appears, as shown in the following example:

The screenshot shows a window titled "Fusion Middleware Configuration Wizard" with a subtitle "Specify Domain Name and Location". The Oracle logo is in the top right corner. The main area contains the instruction "Enter the application location for the selected domain:". Below this, there are three input fields: "Domain name:" with the value "mobile\_domain", "Domain location:" with the value "C:\Oracle\10. mobile\_domain s\domains", and "Application location:" with the value "C:\Oracle\10.3.6\user\_projects\applications". A "Browse" button is next to the "Application location" field. At the bottom, there are "Exit", "Help", "Previous", and "Next" buttons.

Fusion Middleware Configuration Wizard

Specify Domain Name and Location

ORACLE

Enter the application location for the selected domain:

Domain name: mobile\_domain

Domain location: C:\Oracle\10. mobile\_domain s\domains

Application location: C:\Oracle\10.3.6\user\_projects\applications Browse

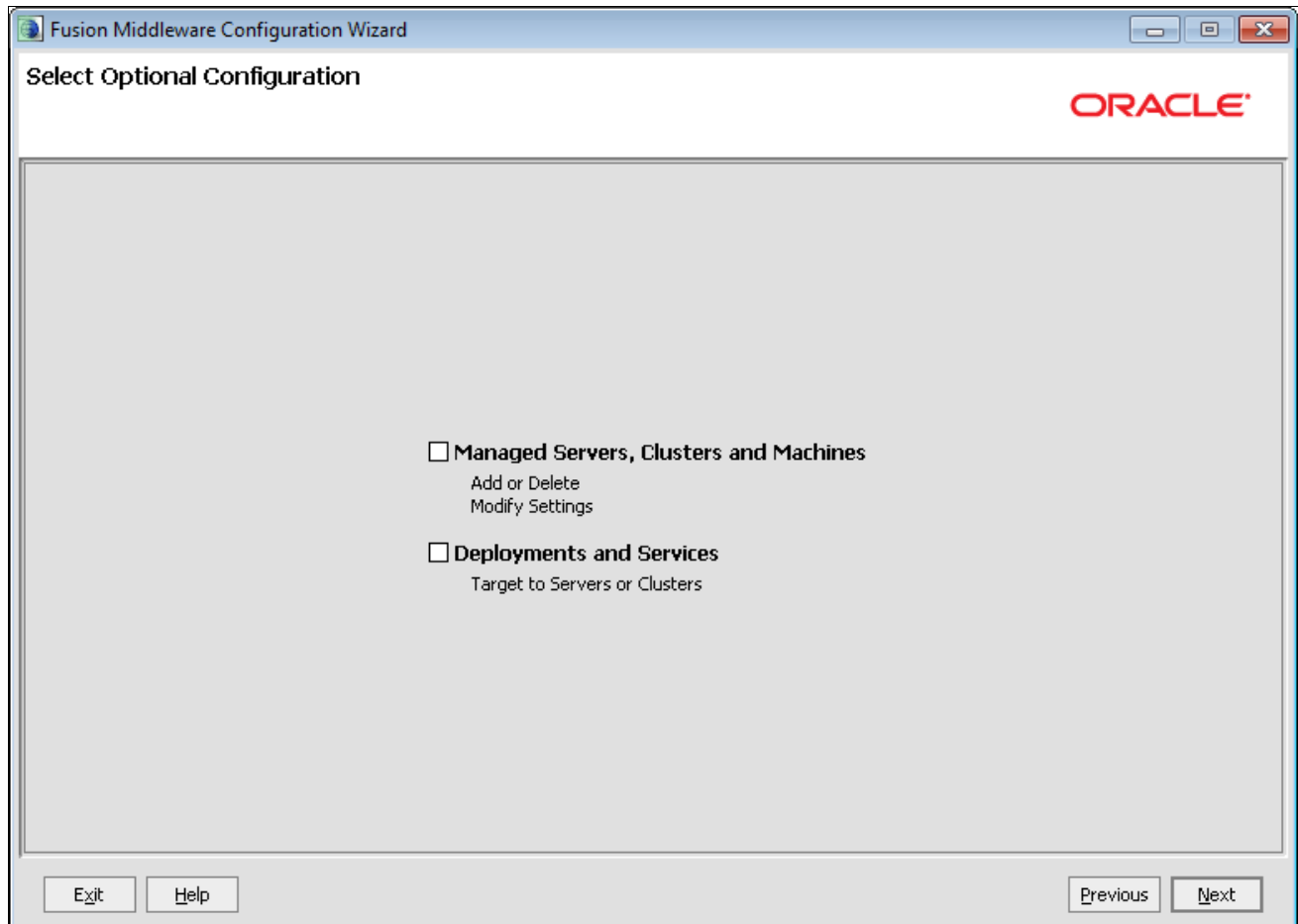
Exit Help Previous Next

Fusion Middleware Configuration Wizard: Specify Domain Name and Location page

7. On the Specify Domain Name and Location page, click Next.

In an earlier step, you specified the domain name and the location that now populate these fields.

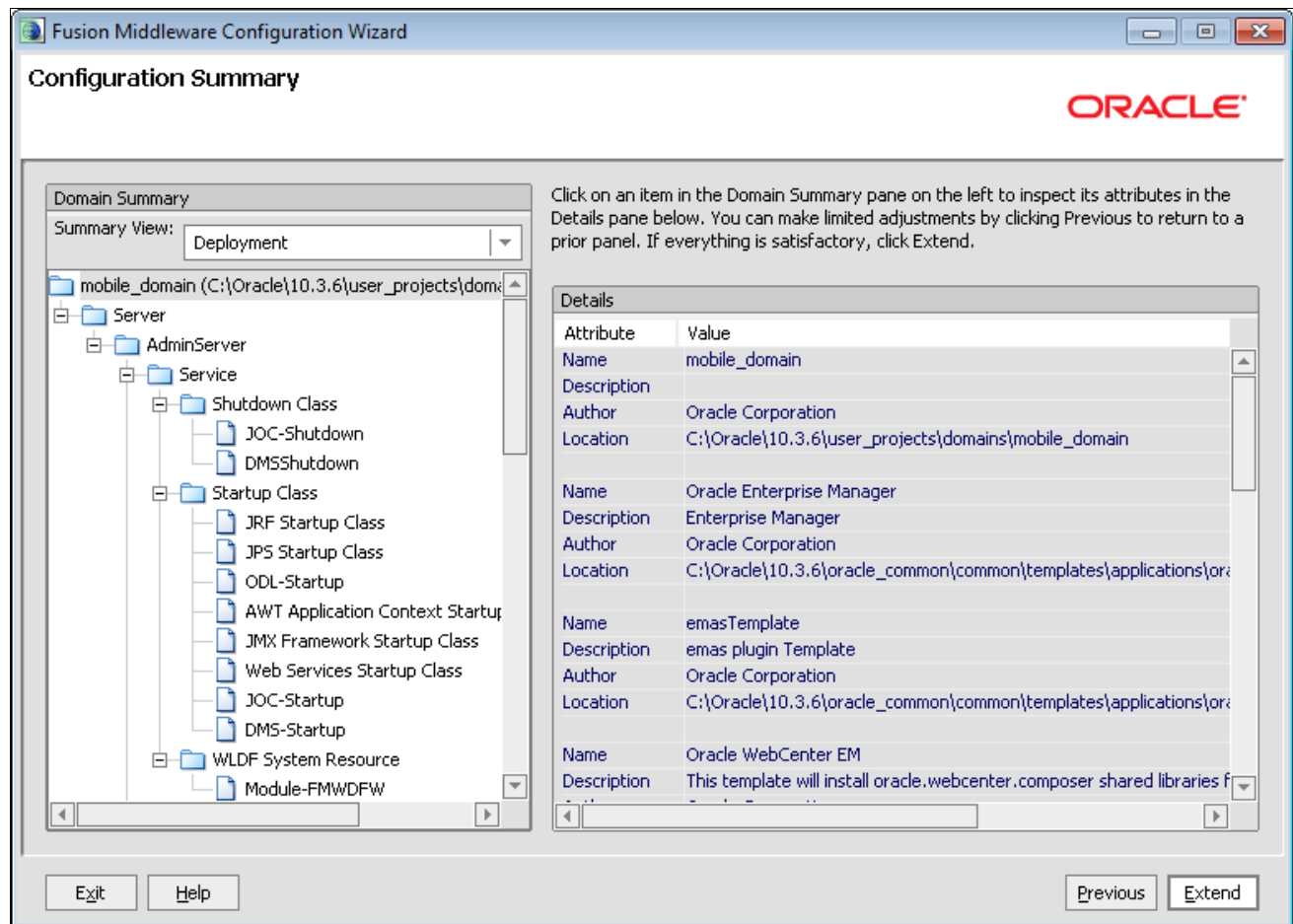
The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Select Optional Configuration page

8. The Select Optional Configuration page requires no action. Click Next.

The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:

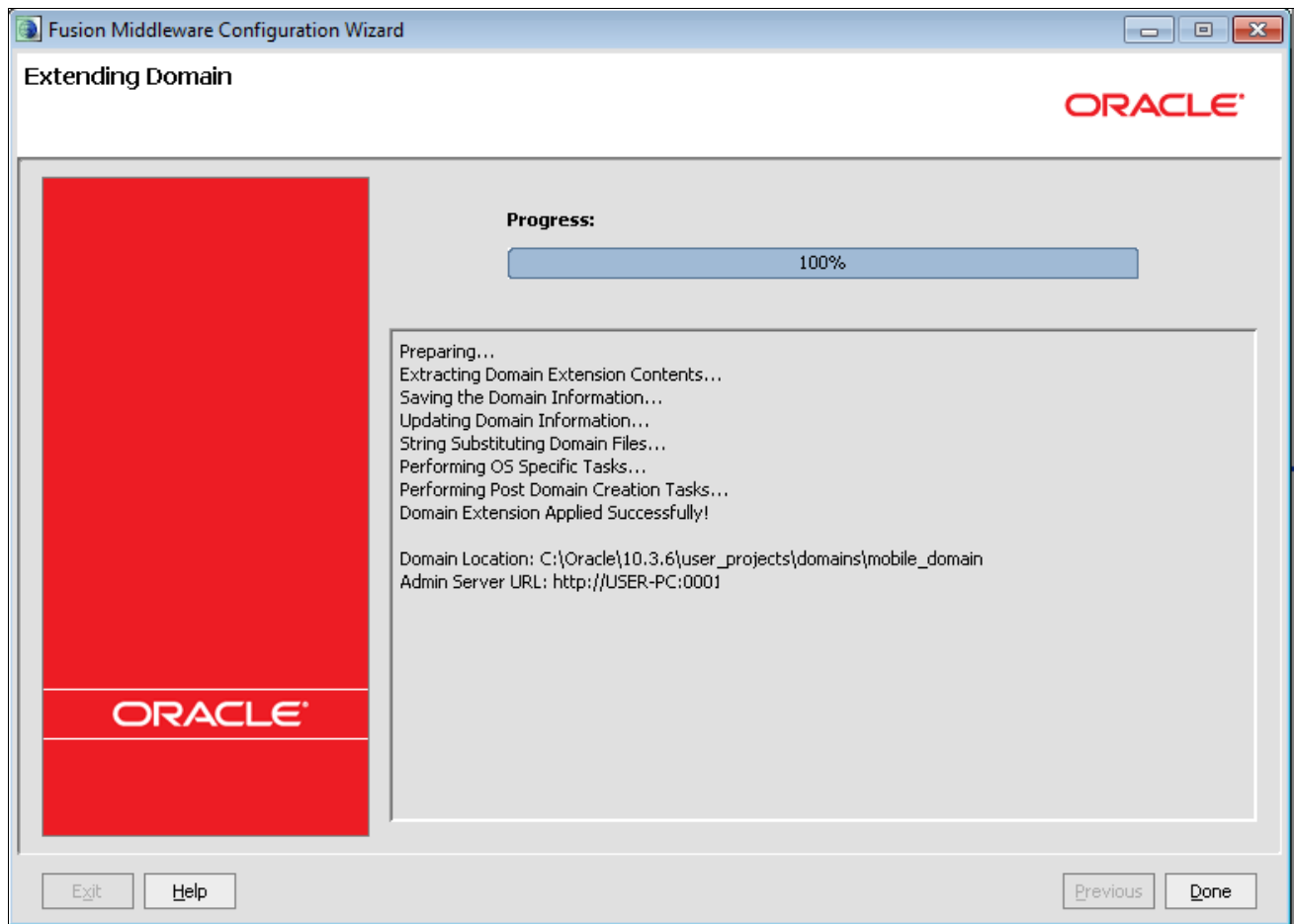


Fusion Middleware Configuration Wizard: Configuration Summary page

9. On the Configuration Summary page, review your configuration details and then click the Extend button.

If you need to make corrections, click the Previous button to go back and modify your details.

The Fusion Middleware Configuration Wizard - Extending Domain page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Extending Domain page

10. On the Extending Domain page, click the Done button.

To create additional domains:

1. Refer to the task Installing the Oracle Application Development Runtime Installer earlier in this chapter.
2. On the Welcome page, select the option Create a new WebLogic domain instead of Extend a WebLogic domain.
3. For the remainder of the options, use the same selections as previously described.
4. Repeat steps 2 and 3 for each additional domain.

### Task 19-3-3: Starting the Administration Server

To get your deployments up and running, you must start the Administration Server. You can do this by running the startWebLogic.sh script (on UNIX operating systems) or the startWebLogic.cmd script (on Microsoft Windows operating systems) in the directory where you created your new domain.

To start the Administration Server, navigate to and run the appropriate script, as follows:

- On UNIX systems:  
DOMAIN\_HOME/startWebLogic.sh
- On Microsoft Windows systems:  
DOMAIN\_HOME\startWebLogic.cmd

You entered the domain name and location on the Specify Domain Name and Location screen in the Configuration Wizard.

## Task 19-4: Applying the PeopleSoft Mobile Inventory Management Authentication Provider

---

This section discusses:

- Understanding the PeopleSoft Authentication Provider
- Prerequisites
- Copying the wLPSFTSecurityProviders.jar File
- Copying the PeopleSoft psjoa.jar File
- Adding the PeopleSoft Authentication Provider to the Active Security Realm

### Understanding the PeopleSoft Authentication Provider

The PeopleSoft Authentication Provider authenticates a user name and password by connecting to a PeopleSoft Application Server. With successful authentication, the system creates a Principal and Subject, identifying the authorized use of a secure web server session. The system can use this subject to run a secure web session and provide WS-Security parameters for subsequent calls to the PeopleSoft system.

To apply the PeopleSoft Mobile Inventory Management Authentication Provider, you must perform the procedures in this section, for either Microsoft Windows or UNIX, to copy the necessary .jar files and then add the authentication provider to the security realm.

### Prerequisites

Before you begin, verify that you meet the following requirements:

- Access to the wLPSFTSecurityProviders.jar file.

The file location is in *PS\_APP\_HOME*\setup\oracle\adf\MobileInventory.

The wLPSFTSecurityProviders.jar file can be found in the preceding directory location *after* you complete the Bundle 16 installation instructions that include the task titled Installing PeopleSoft Mobile Inventory Management.

- Access to the psjoa.jar file.

Oracle delivers the psjoa.jar file as part of PeopleSoft PeopleTools. This file must come from the version of PeopleTools that is running your application server.

For Microsoft Windows installations, this file is in the *PS\_HOME*\web\psjoa\ subdirectory.

For UNIX installations, this file is in the *PS\_HOME*\appserv\classes\ subdirectory.



## Task 19-4-1: Copying the wPSFTSecurityProviders.jar File

The PSFTSecurityProviders.jar file is a Managed Bean (Mbean). The Mbeans contain meta information that the Oracle WebLogic Server understands. All Mbeans that Oracle WebLogic uses are in the %WL\_HOME%\server\lib\mbeantypes directory.

---

**Note.** The %WL\_HOME% referred to here is <installation directory>+wlserver\_10.3 directory, *not* the parent installation directory <installation directory>.

For example, c:\bea1036\wlserver\_10.3.

---

For Microsoft Windows:

Copy wPSFTSecurityProviders.jar to %WL\_HOME%\server\lib\mbeantypes.

For UNIX:

Copy wPSFTSecurityProviders.jar to \${WL\_HOME}/server/lib/mbeantypes.

---

## Task 19-4-2: Copying the PeopleSoft psjoa.jar File

The PeopleSoft PeopleTools library file psjoa.jar must be accessible to the mobile application that is running on the Oracle WebLogic Server. The file psjoa is release dependent and *must* be the same PeopleSoft PeopleTools release as the version that you are running on the application server.

You must copy this jar file from your *PS\_HOME* to the Mobile Inventory Oracle WebLogic Server and place it in the *WL\_HOME*\server\lib\PeopleSoft\ directory.

---

**Important!** Each time you apply maintenance, you must also replace the psjoa.jar file. For example, if the PeopleSoft PeopleTools release changes from 8.55.05 to 8.55.xx, you must copy a new version of the psjoa.jar file to the Oracle WebLogic Server.

---

To copy the PeopleSoft the psjoa.jar file to the %WL\_HOME%\server\lib\PeopleSoft\ directory, perform the following steps specific to Microsoft Windows or UNIX:

1. If you are running on Microsoft Windows, complete the following steps to copy the psjoa.jar file to the *WL\_HOME*\server\lib\PeopleSoft\ directory:
  - a. Access your Mobile Inventory Oracle WebLogic Server.
  - b. Create a PeopleSoft directory under %WL\_HOME%\server\lib\.
  - c. Copy the psjoa.jar file from your *PS\_HOME*\web\psjoa to %WL\_HOME%\server\lib\PeopleSoft\.
2. If you are running on UNIX, complete the following steps to copy the psjoa.jar file to the *WL\_HOME*/server/lib/PeopleSoft/ directory:
 

(*PS\_HOME* should be from a UNIX PeopleTools install.)

  - a. Access your Oracle WebLogic Server for Mobile Inventory.
  - b. Create a PeopleSoft directory under %WL\_HOME%/server/lib.
  - c. Copy the psjoa.jar file from your *PS\_HOME*/appserv/classes to \${WL\_HOME}/server/lib/PeopleSoft/.
3. Update the Weblogic classpath.

Do this for the *entire* Oracle WebLogic install or for the *specific* domain where PeopleSoft Mobile Inventory is installed. For Microsoft Windows, you update the file ending in .cmd; for UNIX, you update the file ending in .sh.

For Microsoft Windows, update the file ending in .cmd:

- Entire Oracle WebLogic installation: Update the file %WL\_HOME%\common\bin\commEnv.cmd and prepend the following to the WEBLOGIC\_CLASSPATH environment variable:  
`%WL_HOME%\server\lib\PeopleSoft\psjoa.jar;`
- Specific Domain: Update the file domain\_path\bin\setDomainEnv.cmd and prepend the preceding to the PRE\_CLASSPATH environment variable:

The psjoa.jar file must be a fully qualified path.

---

**Note.** If there is no PRE\_CLASSPATH variable, add it to the file.

For example, set PRE\_CLASSPATH=%WL\_HOME%\server\lib\PeopleSoft\psjoa.jar.

---

For UNIX, update the file ending in .sh:

- Entire Oracle WebLogic installation: Update the file %WL\_HOME%/common/bin/commEnv.sh and prepend the following to the WEBLOGIC\_CLASSPATH environment variable.  
`${WL_HOME}/server/lib/PeopleSoft/psjoa.jar${CLASSPATHSEP}`

---

**Important!** For UNIX installations, be sure to update the file that ends in .sh and ensure that you prepend the WEBLOGIC\_CLASSPATH environment variable, {CLASSPATHSEP}, as shown in the preceding example. Failure to do so will result in login failure when accessing the PeopleSoft system.

---

- Specific Domain: Update the file domain\_path/bin/setDomainEnv.sh and prepend the preceding to the PRE\_CLASSPATH environment variable.
4. Restart the Oracle WebLogic Server and your domain for the changes to take effect.

### Task 19-4-3: Adding the PeopleSoft Authentication Provider to the Active Security Realm

To add the PeopleSoft Authentication Provider to the active Security Realm:

1. Log in to the Oracle WebLogic Server Administration Console.

- a. In the browser instance, enter the location of the local host to start the Administration Console.

For example: `http://localhost:7001/console`.

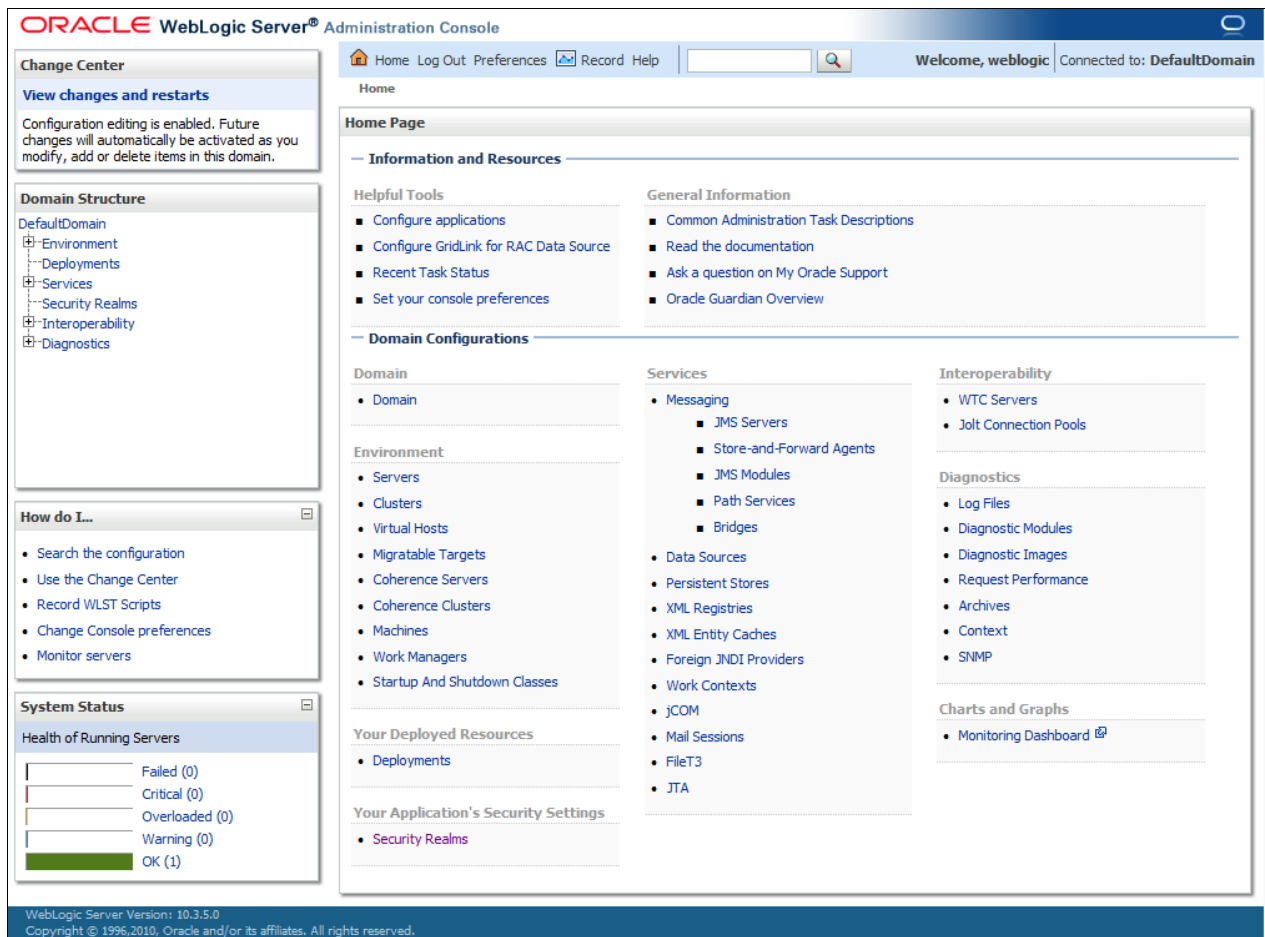
The Oracle WebLogic Server 11g Administration Console - Welcome and login page appears, as shown in the following example:



Oracle WebLogic Server Administration Console: Welcome and login page

- b. On the Welcome and login page, enter your user name and password and click login.

The Oracle WebLogic Server Administration Console - Home page appears, as shown in the following example:



Oracle WebLogic Server Administration Console: Home page

2. On the Home page, click the Security Realms link under the section Your Application's Security Settings.

The Oracle WebLogic Server Administration Console - Summary of Security Realms page appears, as shown in the following example:

The screenshot displays the Oracle WebLogic Server Administration Console interface. At the top, there is a navigation bar with links: Home, Log Out, Preferences, Record, and Help. A search bar is also present. The user is logged in as 'weblogic' and is connected to 'DefaultDomain'. The breadcrumb trail indicates the current location: Home > Summary of Security Realms.

The main content area is titled 'Summary of Security Realms'. It contains two paragraphs of explanatory text:

A security realm is a container for the mechanisms—including users, groups, security roles, security policies, and security providers—that are used to protect WebLogic resources. You can have multiple security realms in a WebLogic Server domain, but only one can be set as the default (active) realm.

This Security Realms page lists each security realm that has been configured in this WebLogic Server domain. Click the name of the realm to explore and configure that realm.

Below the text, there is a link to 'Customize this table'.

The table is titled 'Realms (Filtered - More Columns Exist)'. It has two columns: 'Name' and 'Default Realm'. The table contains one row with the name 'myrealm' and the value 'true'.

At the bottom of the table, there are 'New' and 'Delete' buttons, and a pagination indicator showing 'Showing 1 to 1 of 1' with 'Previous' and 'Next' links.

Name	Default Realm
myrealm	true

Oracle WebLogic Server Administration Console: Summary of Security Realms page

- On the Summary of Security Realms page, click the myrealm link to open the default security realm.

The Oracle WebLogic Server Administration Console - Authentication Providers page appears, as shown in the following example:

Home > Summary of Security Realms > myrealm > Providers

**Settings for myrealm**

Configuration | Users and Groups | Roles and Policies | Credential Mappings | **Providers** | Migration

**Authentication** | Password Validation | Authorization | Adjudication | Role Mapping | Auditing | Credential Mapping

Certification Path | Keystores

An Authentication provider allows WebLogic Server to establish trust by validating a user. You must have one Authentication provider in a security realm, and you can configure multiple Authentication providers in a security realm. Different types of Authentication providers are designed to access different data stores, such as LDAP servers or DBMS. You can also configure a Realm Adapter Authentication provider that allows you to work with users and groups from previous releases of WebLogic Server.

[Customize this table](#)

**Authentication Providers**

New | Delete | Reorder | Showing 1 to 2 of 2 | Previous | Next

<input type="checkbox"/>	Name	Description	Version
<input type="checkbox"/>	DefaultAuthenticator	WebLogic Authentication Provider	1.0
<input type="checkbox"/>	DefaultIdentityAsserter	WebLogic Identity Assertion provider	1.0

New | Delete | Reorder | Showing 1 to 2 of 2 | Previous | Next

Oracle WebLogic Server Administration Console: Settings for myrealm page

- On the Authentication Providers page, select the Providers tab to access the Providers page and options.

5. On the Providers page, select the Authentication tab and then click the New button in the Authentication Providers table.

The Oracle WebLogic Server Administration Console - Create a New Authentication Provider page appears, as shown in the following example:

Oracle WebLogic Server Administration Console: Create a New Authentication Provider page

6. On the Create a New Authentication Provider page, do the following:
  - a. In the Name field, enter a name for the PeopleSoft Provider.  
For example: *PSFT Provider*.  
This name is for identification purposes only and does not need to match any specific value.
  - b. In the Type field, select *SimplePSFTAuthenticator* from the drop-down list box.  
If *SimplePSFTAuthenticator* is not available for selection, return to the first step and verify that the file *wlPSFTSecurityProviders.jar* is in the correct subdirectory.

- c. Click OK.

The system returns you to the Authentication Providers page.

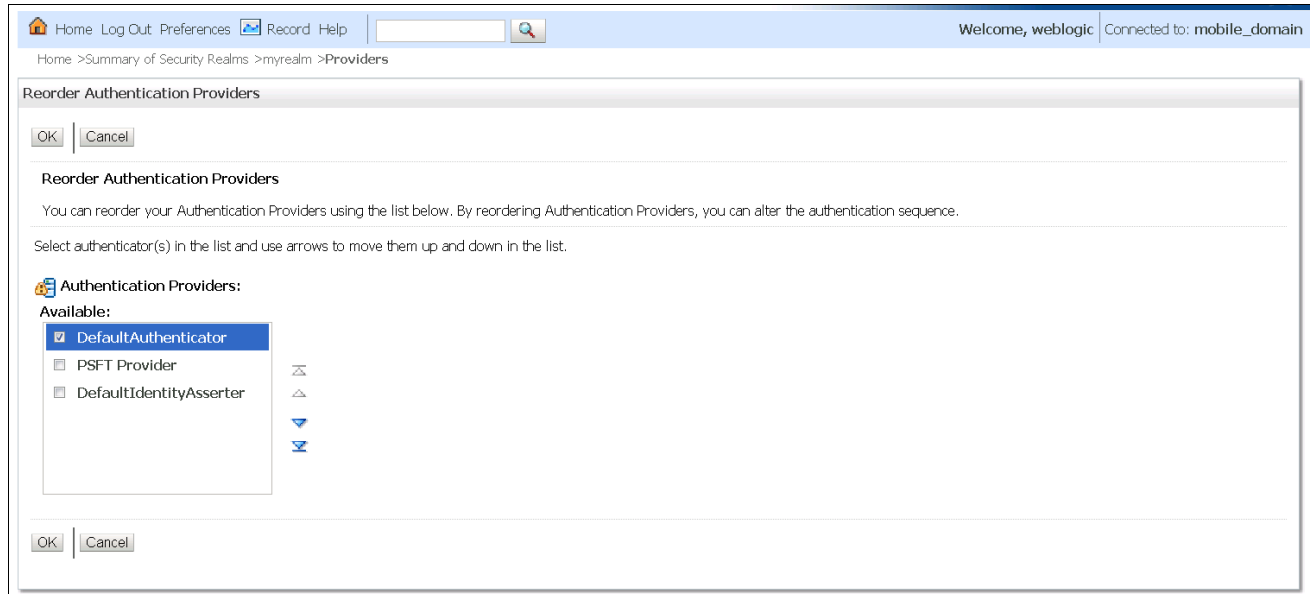
Alternatively, you can click the Providers link in the navigation at the top of the screen.

Authentication Providers			
<input type="button" value="New"/>		<input type="button" value="Delete"/>	<input type="button" value="Reorder"/>
		Showing 1 to 3 of 3 Previous   Next	
<input type="checkbox"/>	Name	Description	Version
<input type="checkbox"/>	DefaultAuthenticator	WebLogic Authentication Provider	1.0
<input type="checkbox"/>	DefaultIdentityAsserter	WebLogic Identity Assertion provider	1.0
<input type="checkbox"/>	PSFT Provider	WebLogic Simple PSFT Authentication Provider	1.0
<input type="button" value="New"/>		<input type="button" value="Delete"/>	<input type="button" value="Reorder"/>
		Showing 1 to 3 of 3 Previous   Next	

Oracle WebLogic Server Administration Console: Authentication Providers page displaying the newly created PSFT Provider



7. On the Authentication Providers page, click the Reorder button to access the Reorder Authentication Providers page, as shown in the following example:



Oracle WebLogic Server Administration Console: Reorder Authentication Providers page

8. On the Reorder Authentication Providers page, do the following:
- Select the DefaultAuthenticator check box and use the arrows to move the DefaultAuthenticator to the top of the list.
  - After the DefaultAuthenticator reaches the top of the list, click OK to save the order.

9. On the Authentication Providers page, click the link for the PSFT provider that you just added (for example PSFT Provider) to access the properties for that provider.

The Oracle WebLogic Server Administration Console - Settings for PSFT Provider page appears, as shown in the following example:

Home Log Out Preferences Record Help Welcome, weblogic Connected to: DefaultDomain

Home > Summary of Security Realms > myrealm > Providers > PSFT Provider

### Settings for PSFT Provider

**Configuration**

**Common** Provider Specific

Save

This page allows you to define the general configuration of this provider.

**Name:** PSFT Provider

**Description:** WebLogic Simple PSFT Authentication Provider

**Version:** 1.0

**Control Flag:** SUFFICIENT

Save

Oracle WebLogic Server Administration Console: Settings for PSFT Provider page

10. On the Settings for PSFT Provider - Configuration: Common page, select *SUFFICIENT* from the Control Flag drop-down list box for the PeopleSoft Provider, and then click Save.

This action specifies that a logon of true from the PSFT Provider is enough authentication to allow an application to run on the server.

11. Select the Provider Specific tab to access and configure the Provider Specific settings for the PSFT Authentication Provider.

The Oracle WebLogic Server Administration Console - Settings for PSFT Provider: Provider Specific page appears, as shown in the following example:

Oracle WebLogic Server Administration Console - Settings for PSFT Provider: Provider Specific page

12. On the Settings for PSFT Provider - Provider Specific page, do the following:

- Select the Show Login Messages In Log check box to help debug the login issues. It will print the connection type and the PeopleSoft Application Server information in the log file.
- In the People Soft Domain Password field, enter the App server domain password that was specified in PeopleSoft gateway properties.
- In the People Soft App Server field, enter the machine name and port number (the jolt port number) for your PeopleSoft Application Server.
- If your application servers are set up for *failover*, you can enter more than one application server and port number delimited by a coma or a colon.

---

**Important!** Your application server *must* be the same PeopleSoft PeopleTools version as the psjoa.jar file that you previously copied to your web server.

---

See the section Copying the PeopleSoft psjoa.jar File earlier in this chapter.

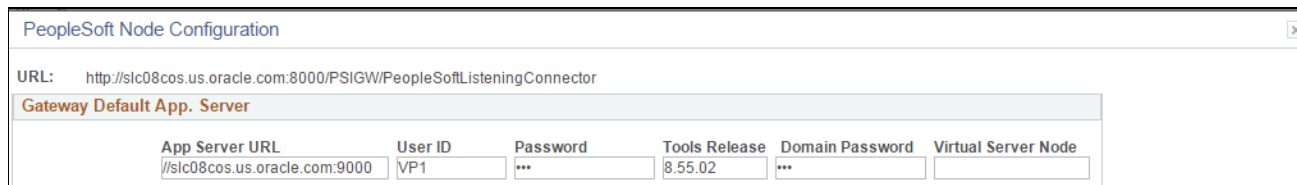
- In Peopletools Base Version, enter the major PeopleSoft PeopleTools release version number, for

example, 8.55.

- If you are unsure of your application server and port number, you can find that information in the integration.properties file under the Jolt Connect section or online on the Advanced Gateway Settings page for the Gateway Default App. Server.

13. Click Save.

The following example shows where you can locate your application server and port number on the Advanced Gateway Settings page for the Gateway Default App. Server:



The screenshot shows the 'PeopleSoft Node Configuration' window. At the top, the URL is 'http://slc08cos.us.oracle.com:8000/PSIGW/PeopleSoftListeningConnector'. Below this is a section titled 'Gateway Default App. Server'. Inside this section is a table with the following fields:

App Server URL	User ID	Password	Tools Release	Domain Password	Virtual Server Node
//slc08cos.us.oracle.com:9000	VP1	***	8.55.02	***	

PeopleSoft Node Configuration page

14. Click the Providers link in the navigation at the top of the screen to return to the Authentication Providers page.

15. On the Authentication Providers page, click the Default Authenticator link to access and configure the settings for the Default Authenticator.

The Oracle WebLogic Server Administration Console - Settings for DefaultAuthenticator page appears, as shown in the following example:

Home Log Out Preferences Record Help Welcome, weblogic Connected to: DefaultDomain

Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator

**Messages**

- ✓ Settings updated successfully.
- ✓ All changes have been activated. However 1 items must be restarted for the changes to take effect.

**Settings for DefaultAuthenticator**

Configuration Performance Migration

Common Provider Specific

Save

This page displays basic information about this WebLogic Authentication provider. You can also use this page to set the JAAS Control Flag to control how this provider is used in the login sequence.

	<b>Name:</b>	DefaultAuthenticator	The name of this WebLogic Authentication provider. <a href="#">More Info...</a>
	<b>Description:</b>	WebLogic Authentication Provider	A short description of the Authentication provider. <a href="#">More Info...</a>
	<b>Version:</b>	1.0	The version number of the Authentication provider. <a href="#">More Info...</a>
	<b>Control Flag:</b>	SUFFICIENT	Returns how the login sequence uses the Authentication provider. <a href="#">More Info...</a>

Save

Oracle WebLogic Server Administration Console: Settings for DefaultAuthenticator page

16. On the Settings for DefaultAuthenticator - Configuration: Common page, select *SUFFICIENT* from the Control Flag drop-down list box for the Default Provider, and then click Save.

This selection specifies that a logon of true from the Default Provider is enough authentication to allow an application to run on the server. The Default Authenticator is set to *REQUIRED*. If you do not change this default setting, applications will not run unless the Default Authenticator validates the session.

17. Click the myrealm link in the navigation at the top of the screen to return to the myRealm page.

18. On the Settings for the myRealm page, select the Providers tab and then select the Password Validation tab, as shown in the following example:

The screenshot displays the Oracle WebLogic Server Administration Console interface. At the top, there is a navigation bar with links for Home, Log Out, Preferences, Record, and Help. A search bar and a welcome message 'Welcome, weblogic' are also present. Below the navigation bar, a breadcrumb trail indicates the current location: Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator > Providers.

The main content area is titled 'Settings for myrealm'. It features a series of tabs: Configuration, Users and Groups, Roles and Policies, Credential Mappings, **Providers**, and Migration. Under the 'Providers' tab, there are sub-tabs: Authentication, **Password Validation**, Authorization, Adjudication, Role Mapping, Auditing, and Credential Mapping. Below these sub-tabs are 'Certification Path' and 'Keystores' sections.

A descriptive paragraph explains the Password Validation provider: 'The Password Validation provider manages and enforces a set of configurable password composition rules. When configured in a security realm, the Password Validation provider is automatically invoked by a supported authentication provider whenever a password is created or updated for a user in the realm. The Password Validation provider then performs a check to determine whether the password meets the criteria established by the composition rules, and the password is accepted or rejected as appropriate.'

Below the description is a link to 'Customize this table'. The main section is titled 'Password Validation Providers'. It includes a toolbar with 'New', 'Delete', and 'Reorder' buttons. A status indicator shows 'Showing 1 to 1 of 1' with 'Previous' and 'Next' links. The table below lists the providers:

<input type="checkbox"/>	Name	Description	Version
<input type="checkbox"/>	SystemPasswordValidator	Password composition checks	1.0

At the bottom of the table, there is another set of 'New', 'Delete', and 'Reorder' buttons, and a status indicator showing 'Showing 1 to 1 of 1' with 'Previous' and 'Next' links.

Oracle WebLogic Server Administration Console: Settings for myrealm page

19. On the Settings for myrealm - Password Validation page, click the SystemPasswordValidator link to access the properties for that validator.

The Oracle WebLogic Server Administration Console - Settings for SystemPasswordValidator page appears, as shown in the following example:

**Configuration**

Common **Provider Specific**

Save

This page allows you to configure additional attributes for this System Password Validation provider.

**Note:** If the Default Authentication provider is configured in the realm, make sure that the setting for the minimum password length is consistent with the setting c

**User Name Policies**

☐ Reject if Password Contains the User Name

☐ Reject if Password Contains the User Name Reversed

**Password Length Policies**

Minimum Password Length: 2

Maximum Password Length: 0

**Character Policies**

Maximum Instances of Any Character: 0

Maximum Consecutive Characters: 0

Minimum Number of Alphabetic Characters: 0

Minimum Number of Numeric Characters: 0

Minimum Number of Lower Case Characters: 0

Minimum Number of Upper Case Characters: 0

Minimum Number of Non-Alphanumeric Characters: 0

Oracle WebLogic Server Administration Console: Settings for SystemPasswordValidator page

20. On the Settings for SystemPasswordValidator page, select the Provider Specific tab and modify the properties as follows:
- In the Minimum Password Length field, enter a value of 2.
  - In the Minimum Number of Non-Alphanumeric Characters field, enter a value of 0.
  - Click Save.
21. (Optional) To verify that the Jolt Connection is set up and working properly, add a Security Audit Log by performing the following steps.

**Note.** Setting up a Security Audit Log is *optional* and not required to run PeopleSoft Mobile Inventory Management; however, it could be useful in tracking down connection errors, particularly after PeopleSoft PeopleTools upgrades.

- a. From the Provider's page, select the Auditing tab to access the Auditing Providers page, as shown in the following example:

Home Log Out Preferences Record Help Welcome, weblogic Connected to: DefaultDomain

Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator > Providers > SystemPasswordValidator > Providers

**Settings for myrealm**

Configuration Users and Groups Roles and Policies Credential Mappings **Providers** Migration

Authentication Password Validation Authorization Adjudication Role Mapping **Auditing** Credential Mapping Certification Path

Keystores

An Auditing provider collects, stores, and distributes information about operating requests and the outcome of those requests for the purposes of non-repudiation. An Auditing provider can also handle information about configuration changes for auditing purposes. You can configure multiple Auditing providers in a security realm, but none are required. The default security realm does not include an Auditing provider.

[Customize this table](#)

**Auditing Providers**

New Delete Reorder Showing 0 to 0 of 0 Previous | Next

<input type="checkbox"/>	Name	Description	Version
There are no items to display			

New Delete Reorder Showing 0 to 0 of 0 Previous | Next

Oracle WebLogic Server Administration Console: Auditing Providers page



- b. On the Auditing Providers page, click the New button to access the Create a New Auditing Provider setup page, as shown in the following example:

Home Log Out Preferences Record Help Welcome, weblogic | Connected to: DefaultDomain

Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator > Providers > SystemPasswordValidator > Providers

### Create a New Auditing Provider

OK Cancel

**Create a new Auditing Provider**

The following properties will be used to identify your new Auditing Provider.  
\* Indicates required fields

The name of the Auditing Provider.

\* Name: DefaultAuditor

This is the type of auditing provider you wish to create.

Type: DefaultAuditor ▼

OK Cancel

Create a New Auditing Provider page

- c. On the Create a New Auditing Provider page, in the Name field enter *Default Auditor*, and in the Type field select *Default Auditor* from the drop-down list box.
- d. Click OK.

- e. On the Provider Specific page for the Default Auditor that you just created, in the Severity field select *Failure* from the drop-down list box, as shown in the following example:

Settings for DefaultAuditor page

Selecting a severity level of *Failure* logs any failure to connect from the Authentication Provider to the PeopleSoft Application Server using the Jolt Connection.

- f. Click Save.
22. Log out and cycle the Oracle WebLogic Server instance.  
This enables the PSFT Authentication Provider to install properly.
23. Restart the Oracle WebLogic Server instance.

## Task 19-5: Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management

This section discusses:

- Understanding the PeopleSoft Database Setup for PeopleSoft Mobile Inventory Management
- Setting Up Integration with the PeopleSoft System
- Reviewing the Setup of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker

- Granting Security to PeopleSoft Mobile Inventory Management Objects
- Rebooting the PeopleSoft Application Server
- Verifying PeopleSoft Integration Broker is Web Service Enabled
- Setting Installation Options

## Understanding the PeopleSoft Database Setup for PeopleSoft Mobile Inventory Management

To use PeopleSoft Mobile Inventory Management, you must complete the setup steps within your PeopleSoft environment. These steps customize PeopleSoft Mobile Inventory Management to your specific needs by setting up servers; identifying users, default values, and mobile screen settings; and activating the integration points.

For more information on setting up PeopleSoft application servers and web services, refer to the following product documentation:

See *PeopleTools: System and Server Administration*.

See the PeopleTools installation guide for your database platform and current PeopleTools release.

See *PeopleSoft FSCM: Mobile Inventory Management*.

## Task 19-5-1: Setting Up Integration with the PeopleSoft System

This section discusses:

- Configuring the PeopleSoft Integration Broker for the Gateway
- Configuring the PeopleSoft Integration Broker for Web Services
- Configuring the PeopleSoft Integration Broker Domain
- Activating GETWSDL Service Operation Routing
- Configuring the ANONYMOUS Node With a Valid User

### Configuring the PeopleSoft Integration Broker for the Gateway

You must update the PeopleSoft Integration Broker Gateway to recognize your PeopleSoft application server.

To configure the PeopleSoft Integration Broker for the Gateway:

1. Log in to your PeopleSoft application.

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

The Integration Broker Gateways page appears, as shown in the following example:

**Gateways**

Gateway ID LOCAL

☒ Local Gateway ☐ Load Balancer

URL  [Ping Gateway](#)

[Inbound Gateways](#)  
[JMS Administration](#)

**Gateway Setup Properties**

[Load Gateway Connectors](#)

Connectors			Personalize   Find	First	1-14 of 14	Last
*Connector ID	Description	*Connector Class Name				
1 APNS_TARGETCONNECT		APNTargetConnector	Properties	+	-	
2 AS2TARGET		AS2TargetConnector	Properties	+	-	
3 EXAMPLETARGETCONN		ExampleTargetConnector	Properties	+	-	
4 FILEOUTPUT		SimpleFileTargetConnector	Properties	+	-	
5 FTPTARGET		FTPTargetConnector	Properties	+	-	
6 GETFILE		GetFileTargetConnector	Properties	+	-	
7 GETMAILTARGET		GetMailTargetConnector	Properties	+	-	
8 HTTPTARGET		HttpTargetConnector	Properties	+	-	
9 JMSTARGET		JMSTargetConnector	Properties	+	-	
10 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+	-	
11 PSFTTARGET		PeopleSoftTargetConnector	Properties	+	-	
12 RIDCTARGET		RIDCTargetConnector	Properties	+	-	
13 SFTPTARGET		SFTPTargetConnector	Properties	+	-	
14 SMTPTARGET		SMTPTargetConnector	Properties	+	-	

[Delete Gateway](#)

[Save](#) [Return to Search](#)

Gateways page

3. Complete the URL by entering a valid gateway and webserver name and port.  
For example: http://machineNamePort/PSIGW/PeopleSoftListeningConnector.

4. Click Save.

5. Click OK when the following message appears:

"The Gateway URL has changed. Connector information will be refreshed."

6. Click the Ping Gateway button.

The PeopleSoft Integration Gateway page should appear in a new browser window. Close the window.

7. Click the Advanced Gateway Setup link to open the Gateways page.

The Gateways page appears.

8. On the Gateways page, click the Gateway Setup Properties link.

The system prompts you to enter a user ID and password.

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

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

PeopleSoft Node Configuration

URL: http://slc08cos.us.oracle.com:8000/PSIGW/PeopleSoftListeningConnector

**Gateway Default App. Server**

App Server URL	User ID	Password	Tools Release	Domain Password	Virtual Server Node
//<machine name>:<port>	VP1	***	8.55.02	***	

**PeopleSoft Nodes** Personalize | Find | View All | First 1 of 1 Last

Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	//<machine name>:<port>	VP1	***	8.55.02	***	Ping Node

Advanced Properties Page

OK Cancel Save

PeopleSoft Node Configuration page

10. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server section, do the following:
  - a. In the App Server URL field, enter your application server name and port.
  - b. In the User ID and Password fields, enter the user ID and password of a Super User in your system (typically *VP1/VP1*).
  - c. In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.  
For example: 8.55.
11. In the PeopleSoft Nodes section, in the Node Name field, enter the local node name.  
For example: *PSFT\_EP*
12. Configure the remaining fields for the local node as follows:
  - a. In the App Server URL field, enter your application server name and port.
  - b. In the User ID and Password fields, enter the user ID and password of a Super User in your system (typically *VP1/VP1*).
  - c. In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.  
For example: 8.55
13. Click Save.
14. Click the Ping Node button on the Local Node and verify that it returns a response of Success.

The Ping Node Results page appears as follows, showing Success in the Message Text column:

Ping Node Results

**Node Information**

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Return

Ping Node Results page

## Configuring the PeopleSoft Integration Broker for Web Services

To configure the PeopleSoft Integration Broker for web services:

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

The Integration Broker Service Configuration page appears:

The screenshot shows the 'Service Configuration' page of the PeopleSoft Integration Broker. The page has a tabbed interface with four tabs: 'Service Configuration' (selected), 'UDDI Configuration', 'Restricted Services', and 'Exclude PSFT Auth Token'. The 'Service Configuration' tab contains the following fields and controls:

- \*Service Namespace:** A text field containing the value `http://xmlns.oracle.com/Enterprise/Tools/services`.
- \*Schema Namespace:** A text field containing the value `http://xmlns.oracle.com/Enterprise/Tools/schemas`.
- \*Service System Status:** A dropdown menu with 'Development' selected.
- Enable Multi-queue:** An unchecked checkbox.
- \*WSDL Generation Alias Check:** A dropdown menu with 'None' selected.
- \*Target Location(s) Required for Web Services:** A section with a link labeled 'Setup Target Locations'.
- Last Updated:** A label with the value 'VP1'.
- Last Update Date/Time:** A label with the value '03/07/2016 5:48:35PM'.

At the bottom left of the form is a 'Save' button with a floppy disk icon. Below the form is a breadcrumb trail: 'Service Configuration | UDDI Configuration | Restricted Services | Exclude PSFT Auth Token'.

Service Configuration page

- On the Service Configuration page, click the Setup Target Locations link to access the Target Locations page. The Target Location page appears:

**Target Locations**

**Web Services Target Locations**

\*Target Location

Example http://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector

Alternate Example http://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector/<defaultlocalnode>

Secure Target Location

Example https://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector

Alternate Example https://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector/<defaultlocalnode>

**REST Target Locations**

Target Location

Example http://<machine>:<port>/PSIGW/RESTListeningConnector

Alternate Example http://<machine>:<port>/PSIGW/RESTListeningConnector/<defaultlocalnode>

Secure Target Location

Example https://<machine>:<port>/PSIGW/RESTListeningConnector

Alternate Example https://<machine>:<port>/PSIGW/RESTListeningConnector/<defaultlocalnode>

OK Cancel

Target Locations page

- On the Target Locations page, complete the Target Location URL by replacing the *<machine>:<port>* tokens with your Gateway name and port. In addition, replace the *<defaultlocalnode>* with the default local node.

Then edit the following:

- Enter the machine name where your PeopleSoft PeopleTools installation resides.
- Enter the HTTP port number for the web server.
- Append the default local node to the end (PSFT\_EP is the default value).

The following example uses ui-sun10, 8000 and PSFT\_EP:

http://ui-sun10:8000/PSIGW/PeopleSoftServiceListeningConnector/PSFT\_EP

You will use this URL and port during the deployment step of PeopleSoft Mobile Inventory Management.

- If the system prompts you to update UDDI servers, click Yes.

## Configuring the PeopleSoft Integration Broker Domain

To process synchronous messages, one application server domain must be active. When you configure the application server, ensure that the Pub/Sub feature is set to *On*.

Before you can use the Pub/Sub system, you must activate the domain on which a Pub/Sub server resides.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

## Activating GETWSDL Service Operation Routing

To activate the GETWSDL service operation routing:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.  
The Service Operations - Search page appears.
2. On the Service Operations - Search page, in the Service Operation field, enter *GETWSDL*.
3. In the search results grid, click the GETWSDL link to access the GETWSDL service operation of the IB\_UTILITY service, as shown in the following example:

### Service Operations - Search

▼ Search Criteria

Service:

Add a New Value

Service Operation:

Operation Type:  ▼

Operation Alias:

Search

Service Operations				Personalize	Find	View All			First	1 of 1	Last
Service	Service Operation	Operation Type	Operation Alias								
IB_UTILITY	<a href="#">GETWSDL</a>	Synchronous									

Service Operations - Search page



- On the Service Operations General page for GETWSDL, select the Routings tab to access the Routings page for GETWSDL, as shown in the following example:

Service Operation GETWSDL  
Default Version V1  
☐ User Exception

Note This user exception status is applicable only if an outbound routing cannot be determined. If a valid outbound routing can be determined then the user exception status on the actual routing will be used.

Routing Name

Routing Definitions								Personalize	Find	View All	First	1-2 of 2	Last
Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results					
<input type="checkbox"/>	GETWSDL	V1	Synch	~~ANY~~	EP920MST	Inbound	Inactive						
<input type="checkbox"/>	~GENERATED~36836	V1	Synch	~~ANY~~	EP920MST	Inbound	Active						

[Return to Service](#)

General | Handlers | Routings

Service Operations page: Routings tab for GETWSDL

- On the Routings page, in the Routing Definitions group box, select the check box next to the required Sender Node to activate the Inbound routing (if it does not already show a status of Active).

**Important!** Only one routing should be active, if more than one is present. In the preceding example of the Service Operations - Routings page, you can see GETWSDL and GENERATED 36836 in the Routing Definitions Name column. This view makes GETWSDL and GENERATED 36836 look different, when in fact they are duplicates and the same routing as service operation. Therefore, be careful when you select one to activate and make sure that you do not mistakenly activate both. Otherwise, your Integration Broker test will fail because only one routing can be active.

- Click the Activate Selected Routing button.
- Click Save.

## Configuring the ANONYMOUS Node With a Valid User

You must provide a valid PeopleSoft user for the ANONYMOUS node.

To configure the ANONYMOUS node with a valid user:

- Log in to your PeopleSoft application.

2. Select PeopleTools, Integration Broker, Integration Setup, Nodes and then search for and select ANONYMOUS.

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

The screenshot displays the 'Node Definitions' page for the 'ANONYMOUS' node. The form includes the following fields and options:

- Node Name:** ANONYMOUS
- \*Description:** Used internally by IB system.
- \*Node Type:** External (dropdown)
- \*Authentication Option:** None (dropdown)
- \*Default User ID:** PSEM (with lookup icon)
- WSIL URL:** (empty field)
- Hub Node:** (empty field with lookup icon)
- Master Node:** (empty field with lookup icon)
- Company ID:** (empty field)
- IB Throttle Threshold:** (empty field)
- Image Name:** (empty field with lookup icon)
- Codeset Group Name:** (empty field with lookup icon)
- External User ID:** VP1
- External Password:** (masked with dots)
- External Version:** (empty field)
- Options:**
  - ☐ Default Local Node
  - ☐ Local Node
  - ☒ Active Node
  - ☐ Non-Repudiation
  - ☒ Segment Aware
- Action Buttons:** Copy Node, Rename Node, Delete Node, Save, Return to Search.
- Navigation:** Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions page

3. On the Node Definitions page, in the Default User ID field, click the lookup icon to select a valid PeopleSoft user.

**Note.** This does not need to be a Super User ID.

4. Click Save.

## Task 19-5-2: Reviewing the Setup of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker

The integration between PeopleSoft and the mobile device involves the use of service operations within the PeopleSoft Integration Broker. The following table lists the services that PeopleSoft Mobile Inventory Management uses, along with their corresponding description, task flow, and component interface:

Service	Description	Used by Task Flows	Component Interface
MIN_ADJUSTMENT	Adjustments for Mobile	Adjustments	ADJUSTMENT_INV
MIN_ALT_TYPES_GET	Alternate Item Type for Mobile	All	N/A
MIN_BIN_TRANSFER	Bin to Bin Transfer for Mobile	Bin to Bin Transfer	N/A
MIN_CART_COUNT_GET	Get Par Locations for Mobile	Par Count	CART_COUNT_INV
MIN_CART_COUNT_GET	Get Par Locations for Mobile	Par Count Ad Hoc	CART_COUNT_INV
MIN_CART_COUNT_SAVE	Save Par Locations for Mobile	Par Count	CART_COUNT_INV
MIN_CART_COUNT_SAVE	Save Par Locations for Mobile	Par Count Ad Hoc	CART_COUNT_INV
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Guided Count	N/A
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Count By Item	N/A
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Count By Location	N/A
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Manual Count	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Guided Count	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Count By Item	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Count By Location	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Manual Count	N/A

Service	Description	Used by Task Flows	Component Interface
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Guided Count	COUNT_INV_CI
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Count By Item	COUNT_INV_CI
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Count By Location	COUNT_INV_CI
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Manual Count	COUNT_INV_INF
MIN_EXPRESS_ISSUE	Express Issue for Mobile	Express Issue	EXPRESS_ISSUE_INV_CI
MIN_EXPRESS_ISSUE_VALIDATE	Express Issue for Mobile Validation	Express Issue	N/A
MIN_FUL_INQ_INV_DTL	Fulfillment Inquiry for detail information	Fulfillment Inquiry	MIN_FUL_INQ_INV_CI
MIN_FUL_INQ_INV_HDR	Fulfillment Inquiry for header information	Fulfillment Inquiry	MIN_FUL_INQ_INV_CI
MIN_ITEM_STK_INQ	Item Stock Inquiry for Mobile	Item Stock Inquiry	PUTAWAY_INQ_INV
MIN_LOOKUP_GENERIC_GET	Generic Lookup for Mobile	All	N/A
MIN_MENU	Mobile Menu Service	All	N/A
MIN_NPRCPT_SAVE	Mobile Non-PO Receipt Service	Receiving	MIN_NPO_RECV_CI
MIN_NPRCPT_SAVE	Mobile Non-PO Receipt Service	Receiving Ad Hoc	MIN_NPO_RECV_CI
MIN_OPTIONS	Mobile Inventory Options	All	N/A
MIN_PICK_FDB_SRCH_HDR	Picking Feedback Search	Picking Feedback	MIN_DMD_PICK_INV
MIN_PICK_FDB_SRC2_HDR	Picking Feedback Search	Picking Feedback	MIN_DMD_PICK_INV
MIN_PICK_SAVE	Picking Feedback Save	Picking Feedback	MIN_DMD_PICK_INV
MIN_PROMPT_EDIT	Prompt table Edit Service	Adjustments	N/A

Service	Description	Used by Task Flows	Component Interface
MIN_PROMPT_EDIT	Prompt table Edit Service	Bin to Bin Transfer	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Receiving PO	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Receiving Ad Hoc	N/A
MIN_RCPT_CNTR_GET	Mobile Receiving Get	Receiving PO	PO_RECEIPT_CI
MIN_RCPT_CNTR_SAVE	Mobile Receiving Save	Receiving PO	MIN_PO_RECV_CI
MIN_RECV_DELIVERY	Mobile Delivery Get	Delivery	RECV_DELIVERY_CI
MIN_RECV_DELIVERY_SAVE	Mobile Delivery Save	Delivery	RECV_DELIVERY_CI
MIN_STCK_FEEDBK_FIND	Stockroom Feedback Find	Stockroom Feedback	PUTAWAY_FEEDBK_MBL
MIN_STCK_FEEDBK_GET	Stockroom Feedback Get	Stockroom Feedback	PUTAWAY_FEEDBK_MBL
MIN_STCK_FEEDBK_SAVE	Stockroom Feedback Save	Stockroom Feedback	PUTAWAY_FEEDBK_MBL

---

**Note.** Oracle delivers fully configured service operations for PeopleSoft Mobile Inventory Management. Therefore, the following steps are required only if any service operations are not active.

---

To activate the synchronous service operations for PeopleSoft Mobile Inventory Management, complete the following steps in the PeopleSoft Integration Broker for each service in the preceding table:

1. Activate the service operation:

- a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

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

Service Operations page - General tab

- b. On the Service Operations - General page, in the Default Service Operation Version group box, select the Active check box for the applicable service operation version.

For example: *v1*.

- c. If the version that you want is not the default version for the service operation, you must also activate the default version.

2. Activate the service operation handlers:

- a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

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

General | **Handlers** | Routings

Service Operation MIN\_CART\_COUNT\_GET  
 Default Version v1  
 Operation Type Synchronous

**Handlers** Personalize | Find | View All | First 1 of 1 Last

*Name	*Type	Sequence	*Implementation	*Status
1 REQUESTHDLR	On Request		Application Class	Active

Save Return to Service

General | Handlers | Routings

Service Operations page - Handlers tab

- b. On the Service Operations - Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box for all handlers that the system requires.
  - c. For inbound synchronous service operations, activate the OnRequest handler.
3. Activate the service operation routings:
    - a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

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

General | Handlers | **Routings**

Service Operation MIN\_CART\_COUNT\_GET  
 Default Version v1  
☐ User Exception

Note This user exception status is applicable only if an outbound routing cannot be determined. If a valid outbound routing can be determined then the user exception status on the actual routing will be used.

Routing Name  Add

**Routing Definitions** Personalize | Find | View All | First 1 of 1 Last

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input checked="" type="checkbox"/>	~GENERATED~79679860	v1	Synch	~ANY~	OM920DVL	Inbound	Active	

Inactivate Selected Routings Activate Selected Routings

Save Return to Service

General | Handlers | Routings

Service Operations page - Routings tab

- b. On the Service Operations - Routings page, activate a routing definition for each node that sends or receives data.

To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. You must activate at least one routing if the data is being sent in an XML format.

- c. Activate an inbound routing to receive data into PeopleSoft.

See *PeopleTools: PeopleSoft Integration Broker*.

## Task 19-5-3: Granting Security to PeopleSoft Mobile Inventory Management Objects

This section discusses:

- Understanding How to Grant Security to PeopleSoft Mobile Inventory Management Objects
- Granting Security to PeopleSoft Mobile Inventory Management Objects

### Understanding How to Grant Security to PeopleSoft Mobile Inventory Management Objects

Use the Portal Security Sync from PeopleSoft Pure Internet Architecture to grant security to PeopleSoft Mobile Inventory Management 9.2 objects to any custom Roles or Permission Lists that you maintain. Oracle delivers the Roles and Permission Lists that are set up to run all transactions.

Oracle delivers the following Roles and Permission Lists:

- Roles
  - MIN Administrator - Gives Administrators full access to all Mobile pages.
  - MIN User - Gives User access to Mobile pages but no Mobile setup pages.
- Permission Lists
  - EPMIN1000 - For use by MIN Administrator Role.
  - EPMIN1100 - For use by MIN User Role.

### Granting Security to PeopleSoft Mobile Inventory Management Objects

To grant security to PeopleSoft Mobile Inventory Management objects:

1. Select PeopleTools, Portal, Portal Security Sync.
2. Select Run Control ID PORTAL\_CSS.  
If this run control ID is not already present, select the Add a new value tab and add this run control value.
3. Select the Delete invalid security check box.
4. Click Run.
5. Click OK.

## Task 19-5-4: Rebooting the PeopleSoft Application Server

After you complete the PeopleSoft Mobile Inventory Management 9.2 installation, you must shut down the PeopleSoft Application Server, clear the cache, and then restart the server.



## Task 19-5-5: Verifying PeopleSoft Integration Broker is Web Service Enabled

After you complete the PeopleSoft Mobile Inventory Management 9.2 installation, verify that PeopleSoft Integration Broker is configured for Web Services. Web Services Description Language (WSDL) requires Web Services to communicate between PeopleSoft and the Mobile Inventory Web Server. Details on how to configure PeopleSoft Integration Broker and Web Services are in the PeopleTools installation guide for your database platform product documentation, available on My Oracle Support.

The following example shows a quick test for the PeopleSoft Integration Broker.

If the PeopleSoft Integration Broker is configured properly, the following URL should produce output similar to the example that follows:

[http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT\\_EP/MIN\\_OPTIONS.1.wSDL](http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP/MIN_OPTIONS.1.wSDL)

```
<?xml version="1.0" ?>
- <wsdl:definitions name="MIN_OPTIONS.1" targetNamespace="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:MIN_OPTIONS_REQ.V1="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:MIN_OPTIONS_RSP.V1="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:tns="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/" xmlns:wsp="http://schemas.xmlsoap.org/ws/2003/05/policy" xmlns:xsd="http://www.w3.org/2001/XMLSchema" />
- <wsp:UsagePolicy wsdl:Required="true" />
- <wsp:partnerLinkType name="MIN_OPTIONS_PartnerLinkType">
- <wsp:role name="MIN_OPTIONS_Provider">
- <wsp:portType name="tns:MIN_OPTIONS_PortType" />
- <wsp:partnerLinkType />
- <wsdl:types>
- <wsdl:schema elementFormDefault="qualified" xmlns:xsd="http://www.w3.org/2001/XMLSchema" />
- <wsdl:import namespace="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_REQ.V1" schemaLocation="MIN_OPTIONS_REQ.V1.xsd" />
- <wsdl:import namespace="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_RSP.V1" schemaLocation="MIN_OPTIONS_RSP.V1.xsd" />
- <wsdl:schema />
- <wsdl:types>
- <wsdl:message name="MIN_OPTIONS_REQ.V1">
- <wsdl:documentation>Mobile Inventory Option Req</wsdl:documentation>
- <wsdl:part element="MIN_OPTIONS_REQ.V1:MIN_OPTIONS_REQ" name="parameter" />
- <wsdl:message />
- <wsdl:message name="MIN_OPTIONS_RSP.V1">
- <wsdl:documentation>Mobile Inventory Option Rsp</wsdl:documentation>
- <wsdl:part element="MIN_OPTIONS_RSP.V1:MIN_OPTIONS_RSP" name="parameter" />
- <wsdl:message />
- <wsdl:portType name="MIN_OPTIONS_PortType">
- <wsdl:operation name="MIN_OPTIONS">
- <wsdl:documentation>Mobile Inventory Options</wsdl:documentation>
- <wsdl:input message="tns:MIN_OPTIONS_REQ.V1" name="MIN_OPTIONS_REQ.V1" />
- <wsdl:output message="tns:MIN_OPTIONS_RSP.V1" name="MIN_OPTIONS_RSP.V1" />
- <wsdl:operation />
- <wsdl:portType />
- <wsdl:binding name="MIN_OPTIONS_Binding" type="tns:MIN_OPTIONS_PortType">
- <wsdl:binding style="document" transport="http://schemas.xmlsoap.org/soap/http" />
- <wsdl:operation name="MIN_OPTIONS">
- <wsdl:operation soapAction="MIN_OPTIONS.v1" style="document" />
- <wsdl:policy wsu:Id="UsernameTokenSecurityPolicyPasswordOptional" xmlns:wsu="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-utility-1.0.xsd">
- <wsp:ExactlyOne>
- <wsp:All>
- <wsse:SecurityToken wsp:Usage="wsp:Required" xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
- <wsse:TokenType>wsse:UsernameToken</wsse:TokenType>
- <Claims>
- <SubjectName MatchType="wsse:Exact" />
- <UsePassword wsp:Usage="wsp:Optional" />
- </Claims>
- </wsse:SecurityToken>
- </wsp:All>
- </wsp:ExactlyOne>
- </wsp:Policy>
- <wsdl:input name="MIN_OPTIONS_REQ.V1">
- <wsdl:body encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" use="literal" />
- </wsdl:input>
- <wsdl:output name="MIN_OPTIONS_RSP.V1">
- <wsdl:body encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" use="literal" />
- </wsdl:output>
- </wsdl:operation>
```

Example of URL output produced from properly configured PeopleSoft Integration Broker

See *PeopleTools: PeopleSoft Integration Broker*.

## Task 19-5-6: Setting Installation Options

Oracle recommends that you update the PeopleSoft Mobile Inventory Management indicator on the Installation page.

To set installation options:

1. From the Main menu, select Set Up Financials/Supply Chain, Install, Installation Options.
2. On the Products page, click the Mobile Inventory link to indicate that Mobile Inventory Management is installed.
3. Click Save.

If changes to the Installation table are needed, an informational message appears stating that you must log off and log back on to all clients and application servers for the changes to take effect. To comply, log off all clients, shut down, and restart all application servers, and then log back on to PeopleSoft FSCM for your changes to take effect.

See the product documentation for PeopleSoft FSCM: Mobile Inventory Management for more information and to set user preferences.

Note that the barcode parsing fields are moved from business unit level (Inventory Business Unit Definition page) to installation level (Installation Options page), as shown in the following example:

The screenshot shows the 'Installation Options' page for 'Mobile Inventory'. The 'System Options' section includes the following fields and checkboxes:

- Key Concatenation Separator: [Empty text box]
- Role Name: MIN User [Search icon]
- ☐ Delivery Signature Required
- ☐ Use Barcode Symbolology ID
- ☐ Parse Barcode to Multi-Fields

The 'Task Options' section includes the following fields and checkboxes:

- Task Flow: Par Count [Dropdown arrow]
- Rows Displayed: 10 [Text box]
- \*Initial Display Mode: All Items [Dropdown arrow]
- Alternate Item Display: Item Only [Dropdown arrow]
- ☒ Expert Mode
- ☒ Display Lookups
- ☒ Display Description
- ☒ Collapse Header
- ☒ Display Filter Related Fields
- ☒ Display Prior Entry Caption
- ☒ Display Show/Hide in tables
- ☒ Suppress Unique Compartments
- ☒ Display Par/Max Qty
- ☐ Filter All Alternate Items
- ☐ Allow Interim Save

At the bottom of the page, there are buttons for 'Save', 'Notify', and 'Refresh'. The breadcrumb trail at the bottom reads 'Installation Options | Mobile Inventory'.

Barcode Parsing

## Task 19-6: Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server

To deploy the mobile application to Oracle Application Developer for an Oracle WebLogic Server:

1. Start the Oracle Enterprise Manager.

For example, enter the following URL in a browser:

`http://localhost:7001/em`

The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears, as shown in the following example:

**ORACLE**  
**Enterprise Manager 11g**  
 Fusion Middleware Control

**Login to Oracle Fusion Middleware Control**

Farm: Farm\_mobile\_domain

\* User Name:

\* Password:

**Enhanced User Experience**

- Menu Based Navigation  
Finding a feature in Enterprise Manager is now easy with menus. Well-designed menu navigation makes the product easy to learn and remember.
- Interactive Correlation Charts
- Dynamic Context Menu
- Context Sensitive Help

**New Features**

- SOA Management  
You can manage, monitor and diagnose the SOA infrastructure, as well as the composite applications you deploy. You can configure service engines such as BPEL, Mediator, Human Work Flow and can deploy and manage SCA composite applications.
- Identity Management
- WebCenter Management
- Complete Security and Audit Management
- Configure Logging and Search Log Files

**Did you know...**

**Manage SOA/MDS/ADF Applications**

You can deploy and manage SOA, MDS, ADF applications. The rich set of metrics and monitor information allows you to proactively manage the application and diagnose performance bottlenecks.

Oracle Enterprise Manager 11g Fusion Middleware Control - Login page

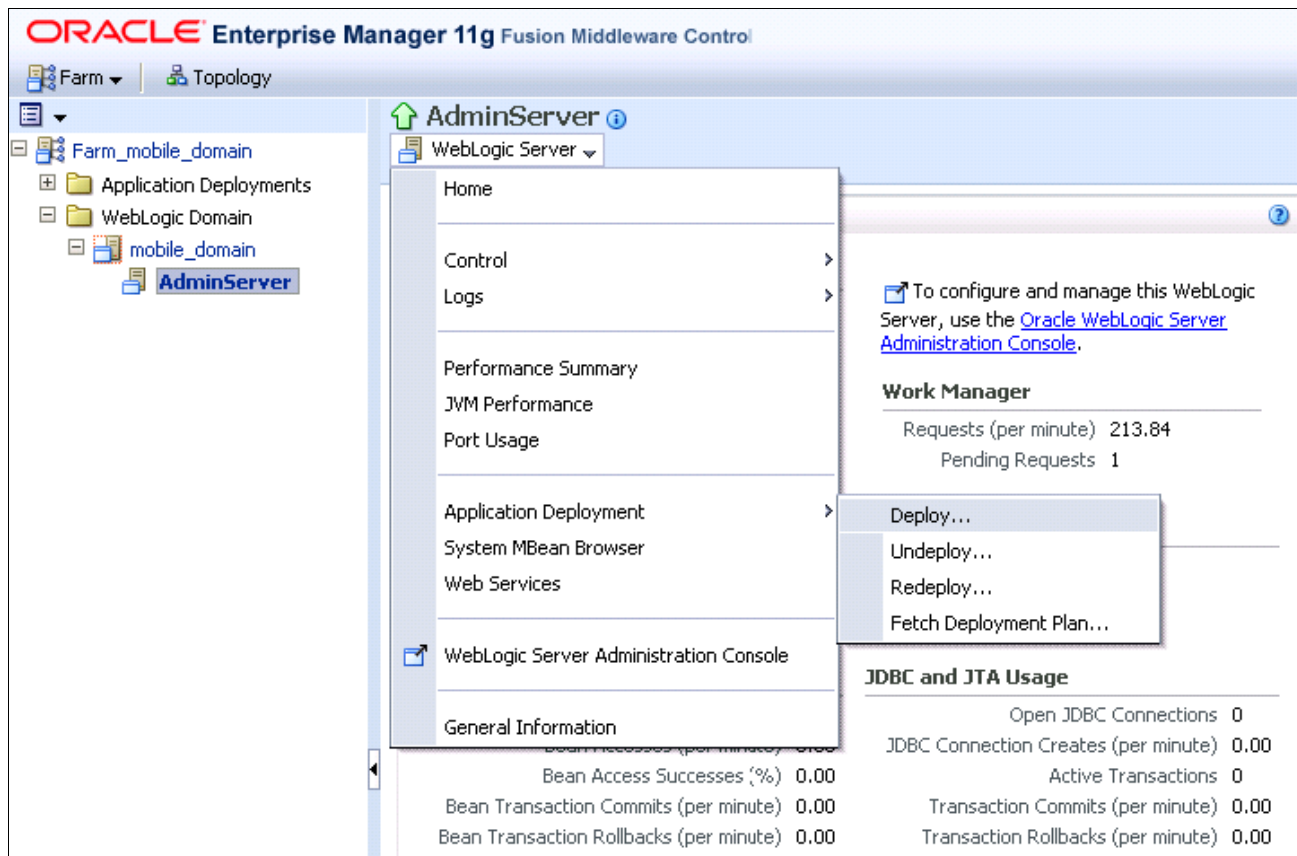
2. On the Login page, enter your user name and password and then click Login.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears.

3. In the Farm tree under WebLogic Domain, select *mobile\_domain* and then select the server where you want the application to deploy.

For example: AdminServer.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page

4. Select the WebLogic Domain drop-down list menu, and then select Application Deployment, Deploy.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Archive page appears, as shown in the following example:

Oracle Enterprise Manager 11g Fusion Middleware Control - Select Archive page

5. On the Select Archive page, click Browse to select the EAR file (either method works), and then click Next.

The EAR file is in `<PS_APP_HOME>\setup\oracle\adf\MobileInventory` directory.

For example: `c:\pt852\setup\oracle\adf\MobileInventory\PsfMobileInv.ear`

The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Target page appears, as shown in the following example:

Select	Name	Type	Deployed Applications
<input checked="" type="checkbox"/>	AdminServer	Oracle WebLogic Server	DMS Application(11.1.1.1.0), FMW Welcome Page Application(11.1.0.0.0), em, wsl-wls

Oracle Enterprise Manager 11g Fusion Middleware Control - Select Target page

6. On the Select Target page, select your Target Server and click Next.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Application Attributes page appears, as shown in the following example:

**ORACLE Enterprise Manager 11g Fusion Middleware Control**

AdminServer (Oracle WebLogic Server) : Deploy Java EE Application

Select Archive Select Target **Application Attributes** Deployment Settings

**Application Attributes** ?

Archive Type Java EE Application (EAR file)  
 Archive Location PsftMobileInvV2.ear  
 Deployment Plan Create a new plan  
 Deployment Target AdminServer

\* Application Name PsftMobileInvV2

**Context Root of Web Modules**

Web Module	Context Root
PsftMobileInv-MobileUI.war	PsftMobile

**Distribution**

☒ Distribute and start application (servicing all requests)  
☐ Distribute and start application in administration mode (servicing only administration requests)  
☐ Distribute only

Oracle Enterprise Manager 11g Fusion Middleware Control - Application Attributes page

7. On the Application Attributes page, click Next.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Settings page appears, as shown in the following example:

**ORACLE Enterprise Manager 11g Fusion Middleware Control**

AdminServer (Oracle WebLogic Server) : Deploy Java EE Application

Select Archive Select Target Application Attributes **Deployment Settings**

**Deployment Settings**

Archive Type Java EE Application (EAR file) Application Name PsftMobileInvV2  
 Archive Location PsftMobileInvV2.ear Version Not versioned  
 Deployment Plan Create a new plan Context Root PsftMobile  
 Deployment Target AdminServer Deployment Mode Distribute and start application (servicing all requests)

**Deployment Tasks**

The table below lists common tasks that you may wish to do before deploying the application.

Name	Go To Task	Description
Configure Web Modules		Configure the web modules in your application.
Configure Application Security		Configure application policy migration, credential migration and other security behavior.
Configure ADF Connections		Configure the ADF connections defined in connections.xml in this application.

Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Settings page

8. On the Deployment Settings page, click Go to Task (the pencil/edit icon) to select the *Configure ADF (Application Developer Framework) Connections* option to change the WSDL Endpoint URLs.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page appears, as shown in the following example:

**ORACLE Enterprise Manager 11g Fusion Middleware Control** Help ▾

AdminServer (Oracle WebLogic Server) : Deploy Java EE Application

Deployment Settings **Configure ADF Connections** Deployment Settings

**Configure ADF Connections** Cancel Step 1 of 1 Apply

**ADF Connections**

Configure the ADF connections defined in connections.xml in this application.

Connection Type	Name	Description	Edit
Web Service	MIN_ADJUSTMENT	Web service connection	
Web Service	MIN_ALT_TYPES_GET	Web service connection	
Web Service	MIN_BIN_TRANSFER	Web service connection	
Web Service	MIN_CART_COUNT_GET	Web service connection	
Web Service	MIN_CART_COUNT_SAVE	Web service connection	
Web Service	MIN_COUNTING_EVENT_GET	Web service connection	
Web Service	MIN_COUNTING_EVENT_SET	Web service connection	
Web Service	MIN_COUNTING_EVENT_VALIDATE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE_VALIDATE	Web service connection	
Web Service	MIN_FUL_INQ_INV_HDR	Web service connection	
Web Service	MIN_ITEM_STK_INQ	Web service connection	
Web Service	MIN_LOOKUP_GENERIC_GET	Web service connection	
Web Service	MIN_MENU	Web service connection	
Web Service	MIN_NPRCPT_SAVE	Web service connection	
Web Service	MIN_OPTIONS	Web service connection	
Web Service	MIN_PROMPT_EDIT	Web service connection	
Web Service	MIN_RCPT_CNTR_GET	Web service connection	
Web Service	MIN_RCPT_CNTR_SAVE	Web service connection	
Web Service	MIN_RECV_DELIVERY	Web service connection	
Web Service	MIN_RECV_DELIVERY_SAVE	Web service connection	
Web Service	MIN_STCK_FEEDBK_GET	Web service connection	
Web Service	MIN_STCK_FEEDBK_SAVE	Web service connection	

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page



- On the Configure ADF Connections page, edit *each* Web Service and change to the appropriate PeopleSoft server.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Configure Web Service Connection page appears, as shown in the following example:

**Configure Web Service Connection**

Connection Type: Web Service  
 Name: MIN\_MENU  
 Description: Web service connection

**Connection Details**

WSDL URL:

**Ports**

Port Name	URL	Proxy Host	Proxy Port
Service: MIN_MENU			
MIN_MENU_Port	http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/MIN_MENU.1.ws		

OK Cancel

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure Web Service Connection page

10. On the Configure Web Service Connection page, change both the WSDL URL and the URL in the Ports section.

**Important!** For both URLs, you must replace machineNamePort with your Gateway URL. In addition, if you changed the name of your LocalNode, you must change or add PSFT\_EP to the new local node name. PSFT\_EP is the default name for the local node.

For example: [http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT\\_EP](http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP).

A green dot appears next to any Web Service that has been modified, as shown in the following example. After you perform this step, all of the Web Services should display green dots (repeat for all connections).

**Configure ADF Connections** Cancel Step 1 of 1 Apply

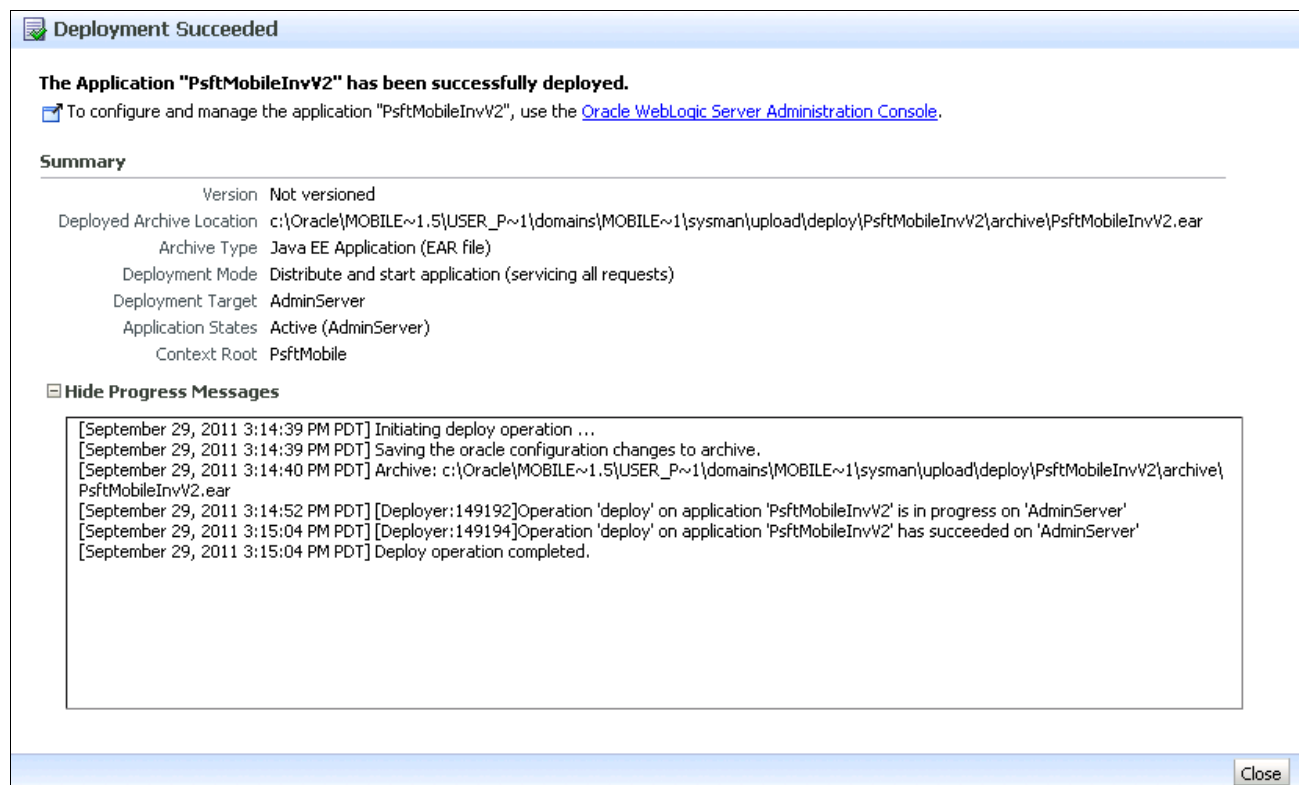
**ADF Connections**  
Configure the ADF connections defined in connections.xml in this application.

Connection Type	Name	Description	Edit
Web Service	MIN_ADJUSTMENT	Web service connection	
Web Service	MIN_ALT_TYPES_GET	Web service connection	
Web Service	MIN_BIN_TRANSFER	Web service connection	
Web Service	MIN_CART_COUNT_GET	Web service connection	
Web Service	MIN_CART_COUNT_SAVE	Web service connection	
Web Service	MIN_COUNTING_EVENT_GET	Web service connection	
Web Service	MIN_COUNTING_EVENT_SET	Web service connection	
Web Service	MIN_COUNTING_EVENT_VALIDATE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE_VALIDATE	Web service connection	
Web Service	MIN_FUL_INQ_INV_HDR	Web service connection	
Web Service	MIN_ITEM_STK_INQ	Web service connection	
Web Service	MIN_LOOKUP_GENERIC_GET	Web service connection	
Web Service	MIN_MENU	Web service connection	
Web Service	MIN_NPRCPT_SAVE	Web service connection	
Web Service	MIN_OPTIONS	Web service connection	
Web Service	MIN_PROMPT_EDIT	Web service connection	
Web Service	MIN_RCPT_CNTR_GET	Web service connection	
Web Service	MIN_RCPT_CNTR_SAVE	Web service connection	
Web Service	MIN_RECV_DELIVERY	Web service connection	
Web Service	MIN_RECV_DELIVERY_SAVE	Web service connection	
Web Service	MIN_STCK_FEEDBK_GET	Web service connection	
Web Service	MIN_STCK_FEEDBK_SAVE	Web service connection	

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page

11. When you are done, click the Apply button, and then click the Deploy button.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Succeeded page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Succeeded page

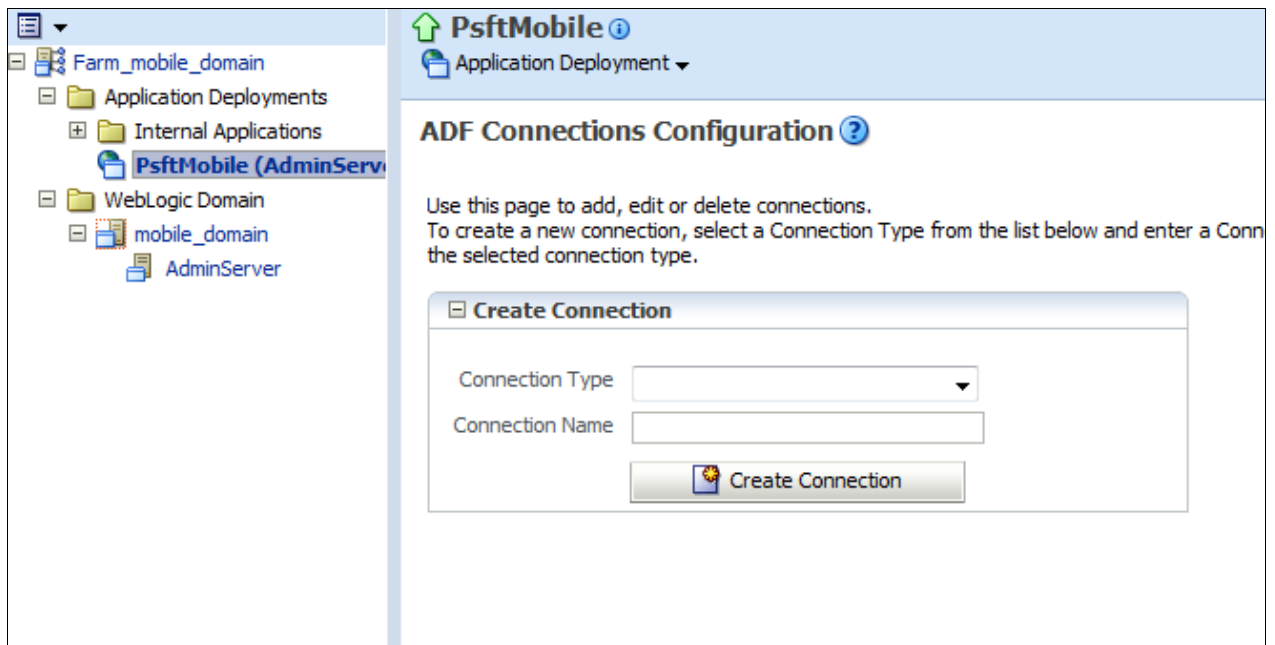
When you complete the deployment correctly, the message "The application PSFTMobile has been successfully Deployed" appears on the screen.

12. Click the Close button.
13. Stop and restart the WebServer.
14. (Optional) Verify the ADF connections .

You can use the Oracle Enterprise Manager to access and view the ADF connections that you used during deployment as follows:

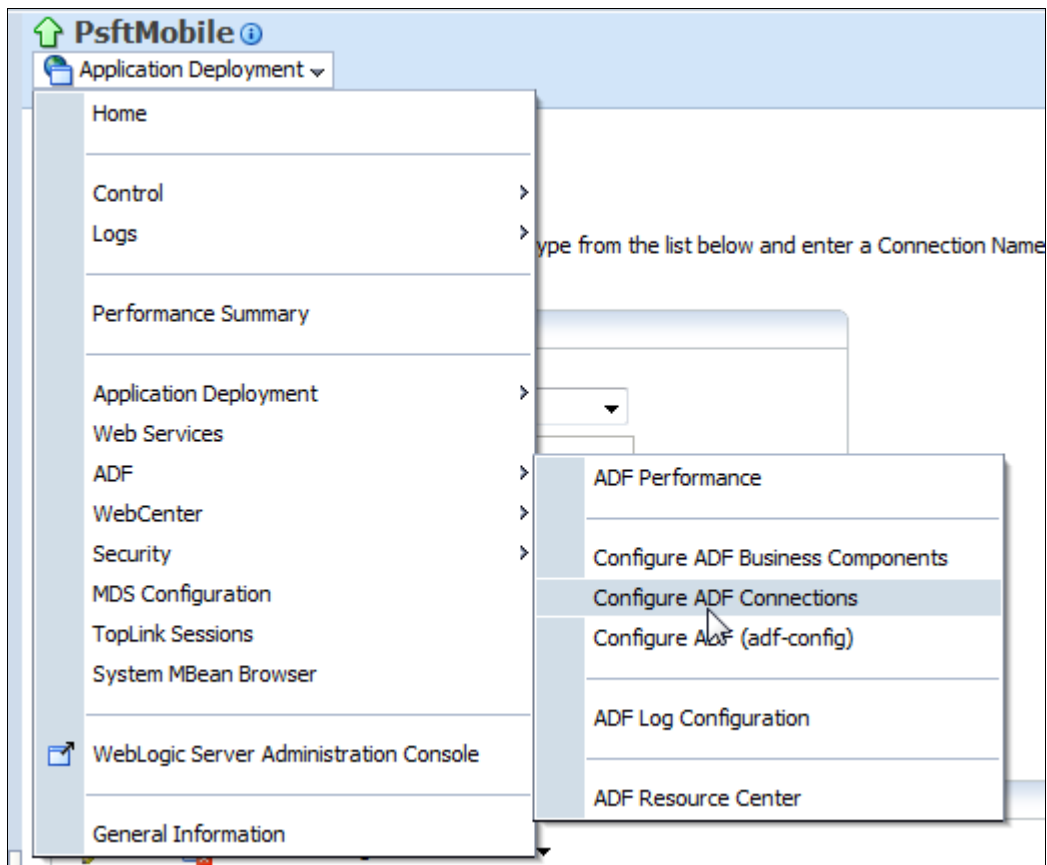
- a. From the Application Deployment tree in the left pane, select PsftMobile.

- b. When you select PsftMobile, the Application Development drop-down list menu becomes available in the right pane.



Oracle Enterprise Manager - PsftMobile: Application Deployment tree page

- c. From the Application Development drop-down list menu, select *ADF, Configure ADF Connections*, as shown in the following example:



Oracle Enterprise Manager menu navigation

The Oracle Enterprise Manager - Application Deployment: ADF Connections Configuration page appears, as shown in the following example:



Oracle Enterprise Manager - Application Deployment: ADF Connections Configuration page

15. To test deployment, log in to the mobile application from a desktop browser.

For example:

<http://localhost:7001/PsftMobileInv/faces/Login>

See the product documentation for PeopleSoft FSCM: Mobile Inventory Management for more details and instructions on how to configure mobile devices for PeopleSoft Mobile Inventory Management and other implementation instructions.

---

**Important!** You may have to re-deploy a Mobile Inventory web service, if the SOAP message sent by the web service is incorrect. For more information on re-deploying Mobile Inventory web services, refer Appendix: "Redeploying Mobile Inventory Web Service."

---

## Task 19-7: Undeploying the Mobile Application

---

To undeploy the mobile application:

1. Start the Oracle Enterprise Manager.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears, as shown in the following example.

2. On the Login page, enter your user name and password and then click Login.

**ORACLE**  
**Enterprise Manager 11g**  
Fusion Middleware Control

**Login to Oracle Fusion Middleware Control**

Farm Farm\_mobile\_domain

\* User Name weblogic

\* Password .....

Login

**Enhanced User Experience**

- Menu Based Navigation  
Finding a feature in Enterprise Manager is now easy with menus. Well-designed menu navigation makes the product easy to learn and remember.
- Interactive Correlation Charts
- Dynamic Context Menu
- Context Sensitive Help

**New Features**

- SOA Management  
You can manage, monitor and diagnose the SOA infrastructure, as well as the composite applications you deploy. You can configure service engines such as BPEL, Mediator, Human Work Flow and can deploy and manage SCA composite applications.
- Identity Management
- WebCenter Management
- Complete Security and Audit Management
- Configure Logging and Search Log Files

**Did you know...**

**Manage SOA/MDS/ADF Applications**

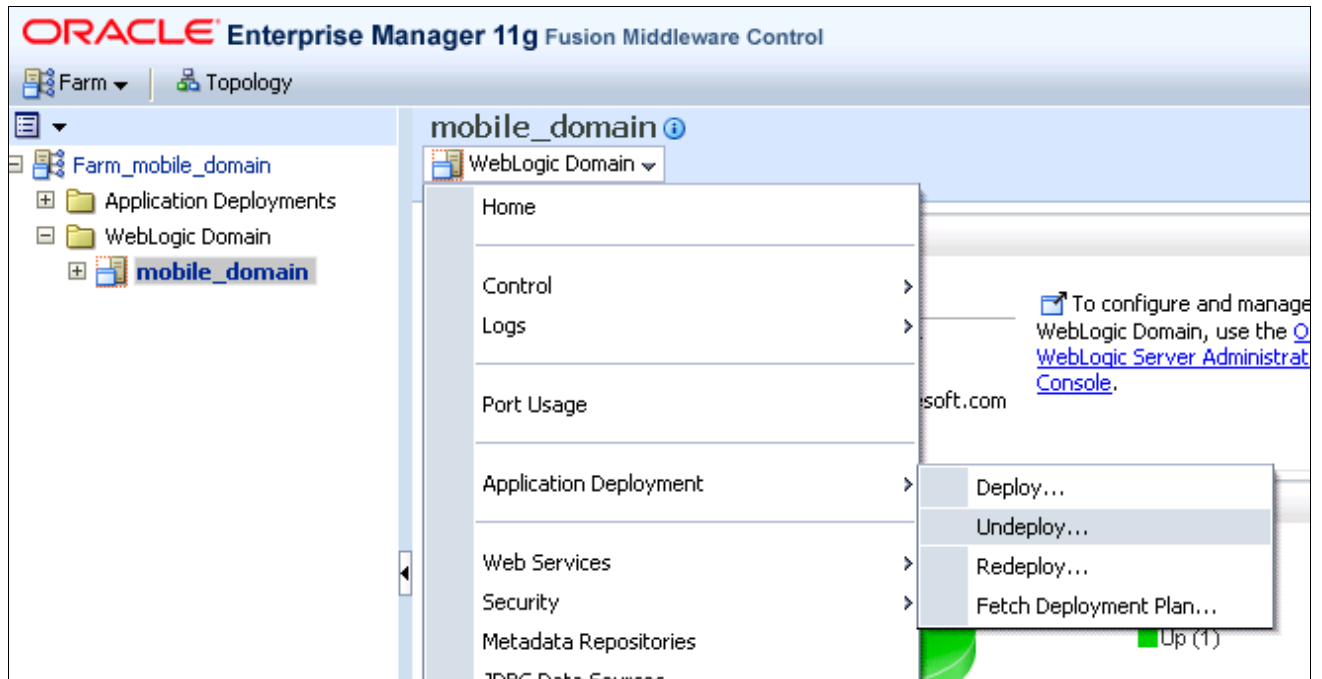
You can deploy and manage SOA, MDS, ADF applications. The rich set of metrics and monitor information allows you to proactively manage the application and diagnose performance bottlenecks.

Oracle Enterprise Manager 11g Fusion Middleware Control - Login page

3. In the Farm tree under WebLogic Domain, select *mobile\_domain* and then select the server where you want the application to deploy.

For example: *AdminServer*.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm tree page appears, as shown in the following example:

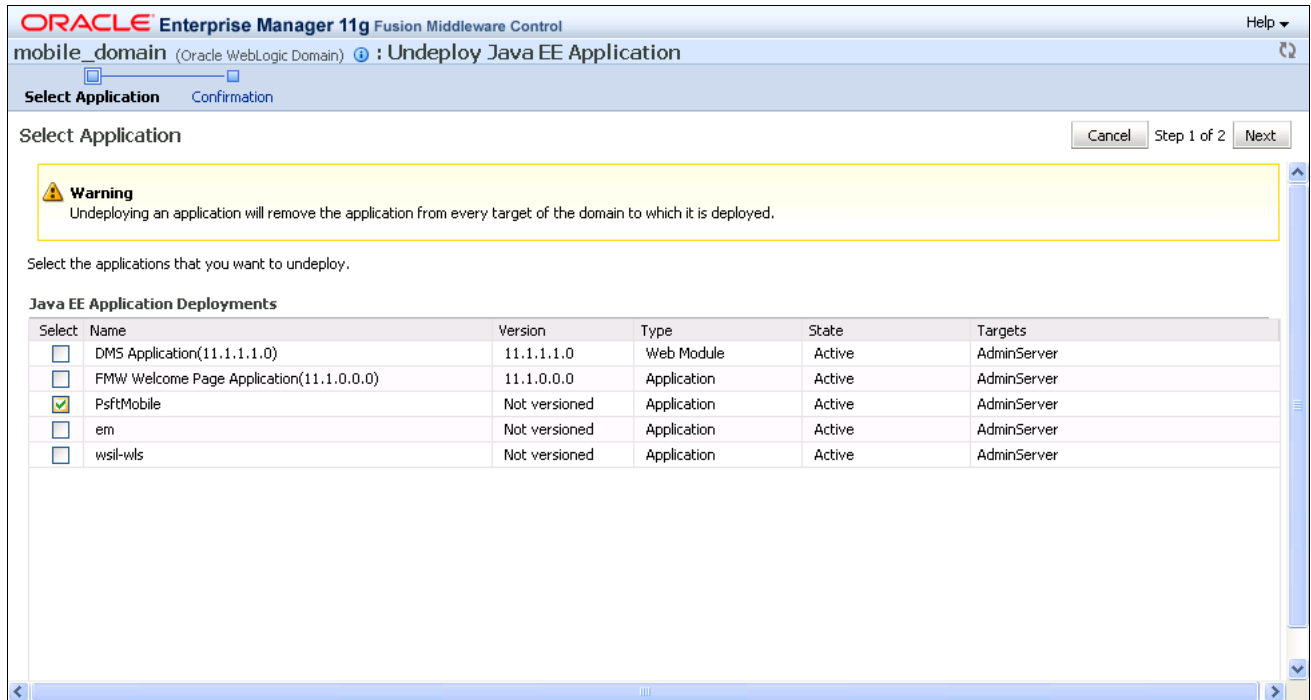


Oracle Enterprise Manager 11g Fusion Middleware Control - Farm tree



- On the Farm Tree page, under the Server Name, select the WebLogic Server drop-down list menu, and then select *Application Deployment, Undeploy*.

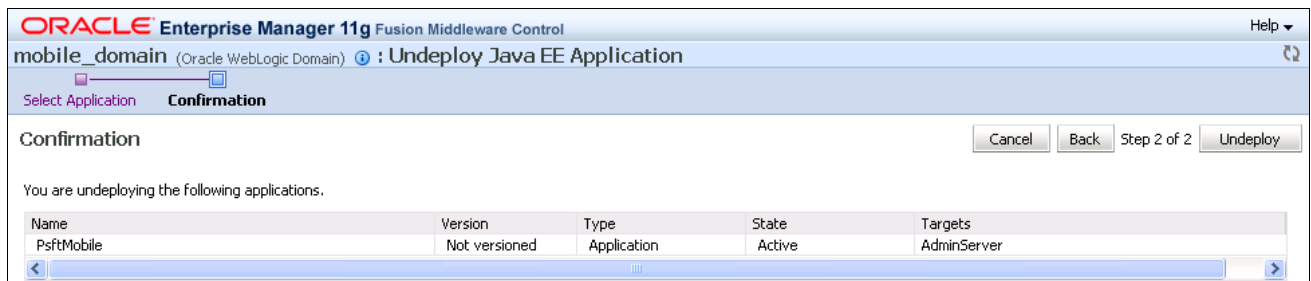
The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Application page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Select Application page

- On the Select Application page, select Application PsftMobile and click Next.

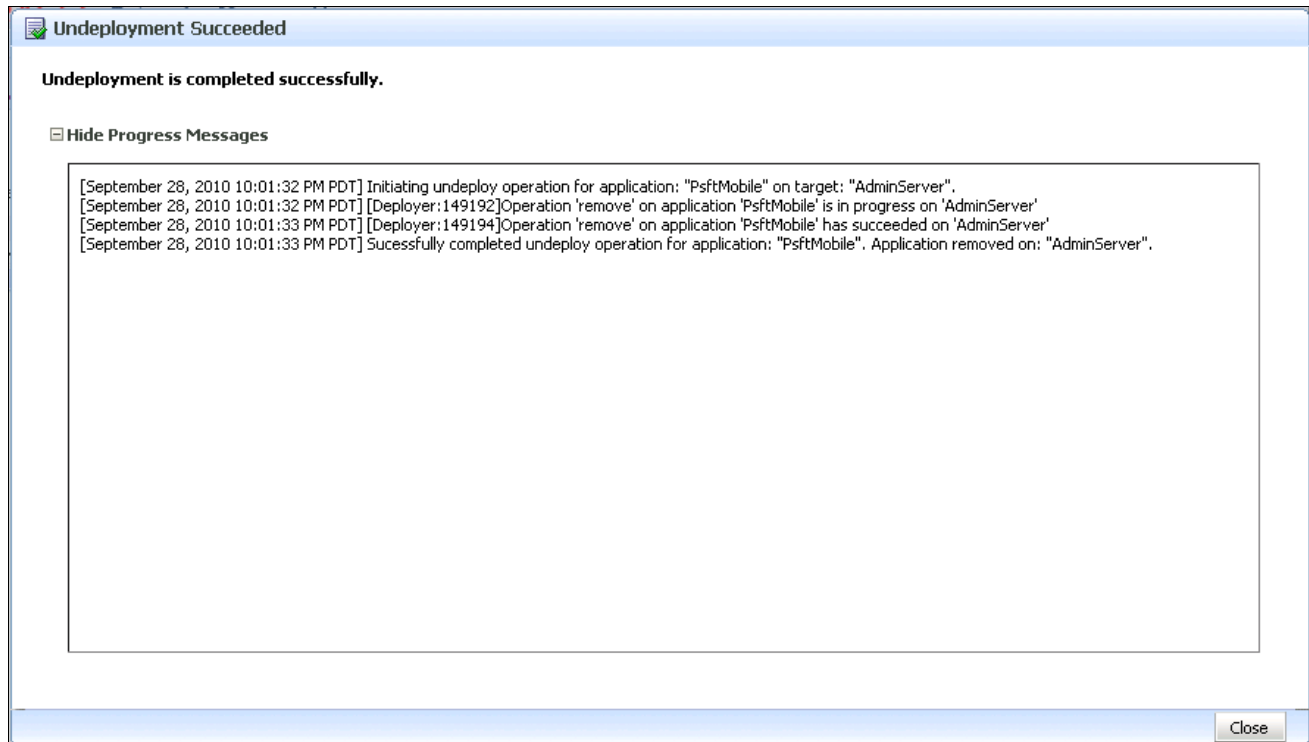
The Oracle Enterprise Manager 11g Fusion Middleware Control - Confirmation page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Confirmation page

6. On the Confirmation page, click the Undeploy button.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Undeployment Succeeded page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Undeployment Succeeded page

7. Deploy the new EAR file by following the instructions in the task titled Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server.
8. Restart the Oracle WebLogic Server.

## Chapter 20

# Configuring WS-Security for PeopleSoft Mobile Inventory Management

This chapter discusses:

- Understanding WS-Security
- Prerequisites
- Understanding the Configuration Process
- Configuring WS-Security for PeopleSoft Mobile Inventory Management

## Understanding WS-Security

---

The PeopleSoft Mobile Inventory Management server communicates to the PeopleSoft Gateway using exposed Web Services from the PeopleSoft system. Generic installations do not secure these web services. It is acceptable for development and testing environments to use a generic installation. However, for a production system, this could pose a security risk. It is up to each installation team to determine if and how they plan to secure the web services that the PeopleSoft Mobile Inventory Management application uses. The application can run with or without applying WS-Security to the web service calls.

This chapter provides a *sample* installation of WS-Security using Security Assertion Markup Language (SAML). SAML is an XML-based open standard for communicating authentication and authorization data between secure domains and is certified with PeopleSoft PeopleTools 8.55.

This installation chapter does not cover the many options and alternatives available to implement WS-Security. Token encryption, SSL and non-SAML based WS-Security are options that you can add or substitute at your installation site as alternatives. To learn more about these alternatives, see the Integration Broker documentation.

See *PeopleTools: PeopleSoft Integration Broker*.

---

**Note.** Oracle does not support a username token with clear text name and password when using the PeopleSoft Mobile Inventory Management application. Implementing WS-Security requires an x509 certificate to establish identity.

---

## Prerequisites

---

Before you begin, ensure that you meet the following requirements:

- Installation and testing of the PeopleSoft 9.2 Mobile Inventory Management application is complete.  
You should not apply WS-Security to an unvalidated system.
- Administrative access to the PeopleSoft Mobile Inventory Management server.

- Administrative access to the PeopleSoft Web server.
- A PeopleSoft User ID that has permission to update security configuration information.
- An x.509 and root certificate from a trusted certificate authority.

---

**Note.** The steps in this installation chapter generate a self-validating certificate, instead of a trusted certificate. Oracle does not recommend that you secure your production system with generated self-signed certificates. You should obtain an x.509 and root certificate from a trusted certificate authority.

---

- Download of the Oracle Repository Creation Utility (RCU) is complete.

To perform the WS-Security tasks in this chapter, you must use RCU. RCU must be run prior to installing the Oracle Web Services Manager (OWSM).

To access RCU:

1. Access the Oracle Technology Network at this URL:  
<http://www.oracle.com/technetwork/index.html>
2. Select Downloads, SOA Suite
3. In the Oracle SOA Suite 11g Installations section (on that page) expand the "Prerequisites & Recommended Install Process" section.
4. Download RCU.

## Understanding the Configuration Process

---

Several tasks are necessary to configure WS-Security for the PeopleSoft Mobile Inventory Management application. There may be dependencies between the steps. Therefore, Oracle recommends that you run the tasks in this chapter in the following order.

---

**Note.** These steps are described in detail and in the correct order in the following section, Configuring WS-Security for PeopleSoft Mobile Inventory Management.

---

1. Run RCU to create a metadata repository.  
OWSM uses this repository to secure policies.
2. Install OWSM, a prerequisite application that is part of Oracle Fusion Middleware.  
Using WS-Security client policies requires that you install OWSM on the PeopleSoft Mobile Inventory Management web server. The installation instructions for OWSM are available in this chapter.
3. Configure the certificates between the Mobile server and the PeopleSoft server.
4. Create the keystore and credential store on the Mobile server.
5. Add the SAML definition information to the PeopleSoft system so that the system can validate and enable the identity of the Mobile server through WS-Security settings.  
Optionally, you can set policies on web services so that they cannot be called without the appropriate WS-Security.
6. Update the connections.xml file to enforce security policies.  
Oracle delivers the connections.xml file with the PeopleSoft Mobile Inventory Management application.

## Task 20-1: Configuring WS-Security for PeopleSoft Mobile Inventory Management

---

This section discusses:

- Running the Oracle Repository Creation Utility
  - Installing the Oracle Web Services Manager
  - Configuring the Certificates
  - Creating and Configuring the Keystore and Credential Store
  - Adding the SAML Definition Information to the PeopleSoft System
  - Updating the connections.xml to Enforce Security Policies
- 

**Important!** There may be dependencies between the tasks necessary to configure WS-Security for the PeopleSoft Mobile Inventory Management application. Oracle recommends that you run the following tasks in the order provided.

---

### Task 20-1-1: Running the Oracle Repository Creation Utility

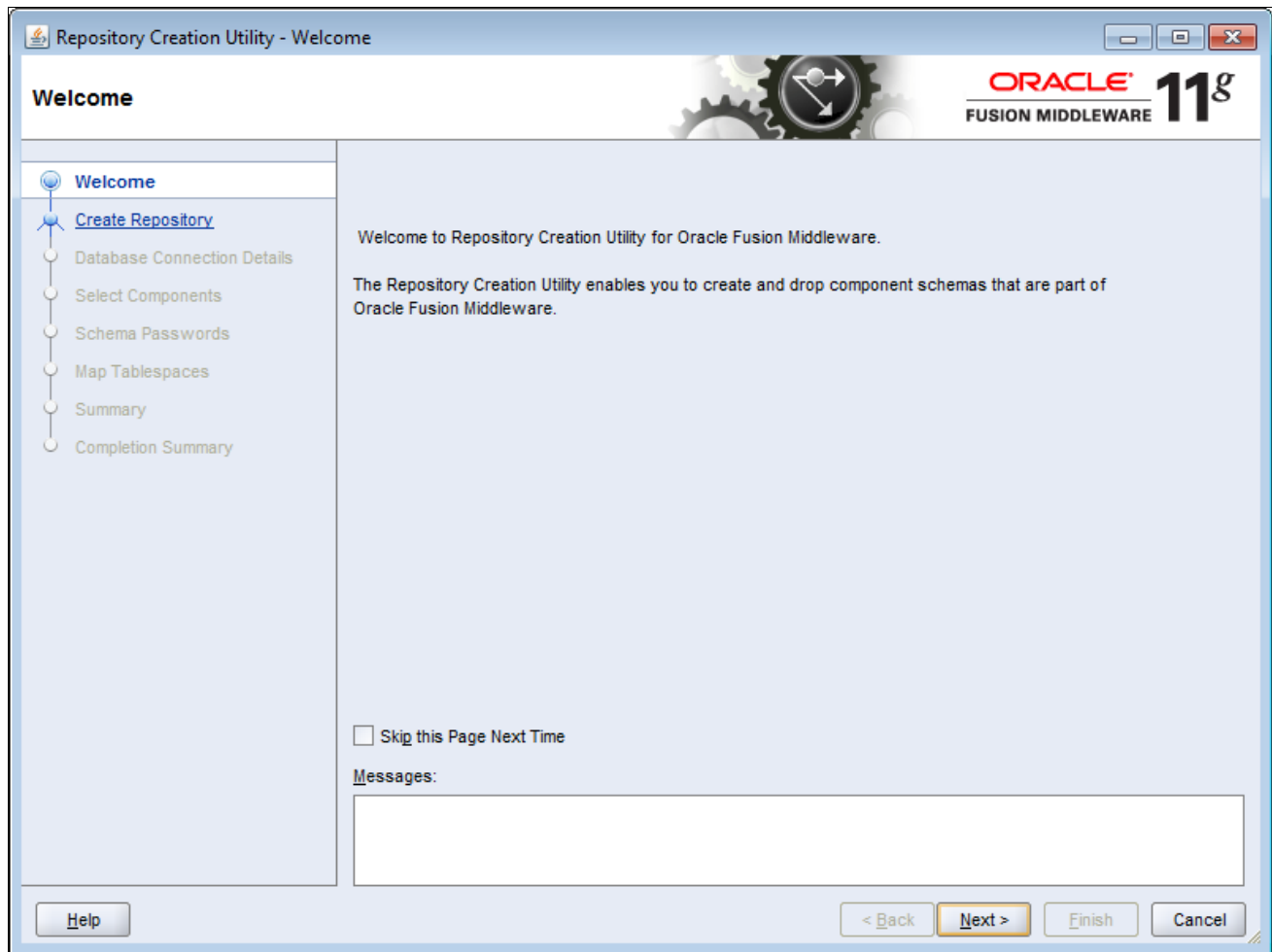
You must run RCU prior to installing the OWSM.

To download and run RCU:

1. Download RCU from the Oracle Technology Network as previously described.  
See Prerequisites.
2. Unzip the rcuHome.zip file into an accessible rcuHome drive.

3. Launch the RCU executable file `/rcuHome/bin/rcu.bat`.

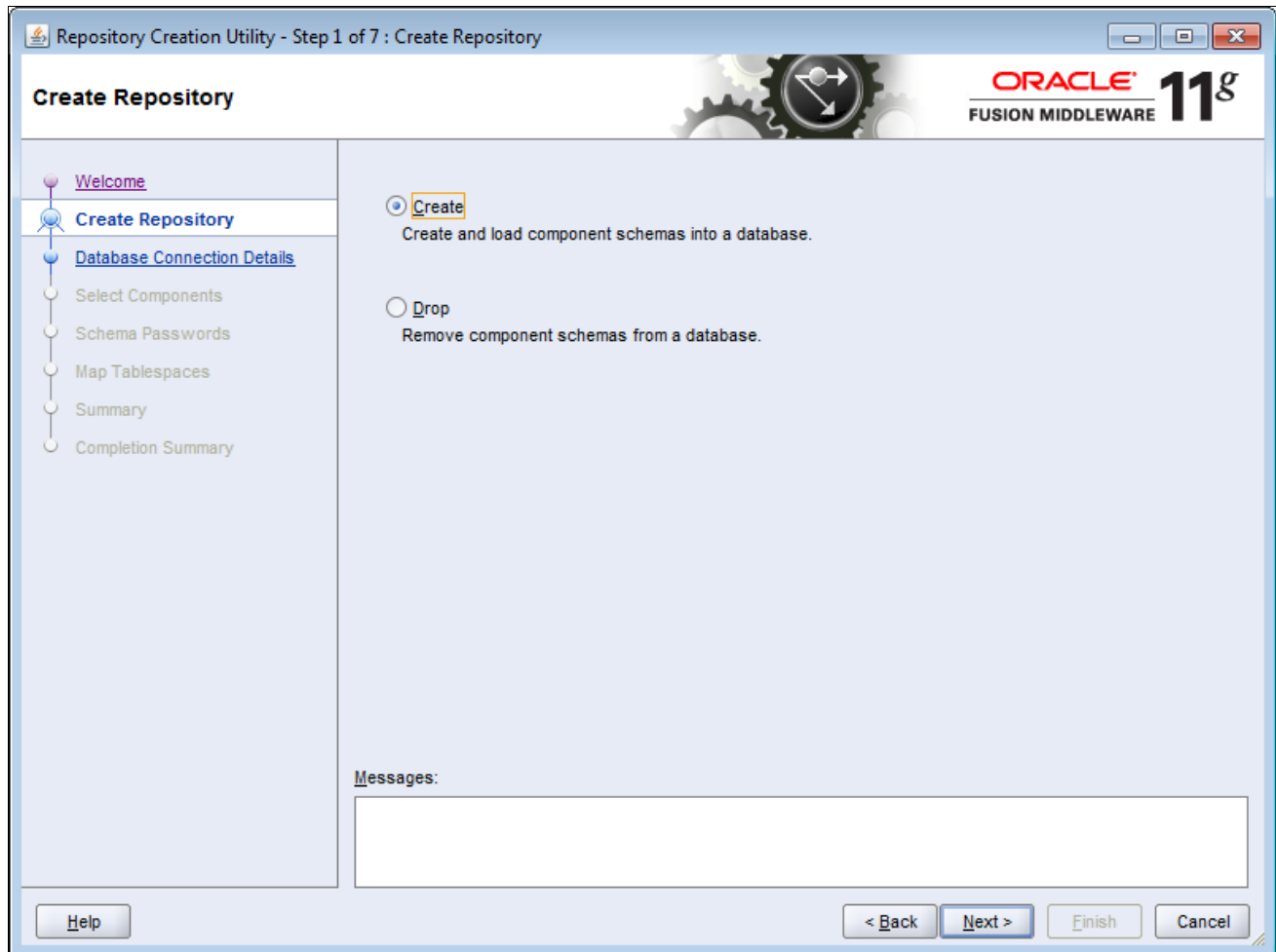
The startup dialog box on the Welcome page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Welcome page

4. On the Repository Creation Utility Welcome page, click Next.

The Repository Creation Utility - Create Repository page (Step 1 of 7) appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Create Repository page (Step 1 of 7)

5. On the Create Repository page (Step 1 of 7), select Create and then click Next.

The Repository Creation Utility - Create Repository page (Step 2 of 7) appears, as shown in the following example:

The screenshot displays the 'Database Connection Details' window of the Oracle Fusion Middleware Repository Creation Utility. The window title is 'Repository Creation Utility - Step 2 of 7 : Database Connection Details'. The Oracle 11g Fusion Middleware logo is in the top right. On the left, a vertical navigation pane shows the progress: Welcome, Create Repository, Database Connection Details (highlighted), Select Components, Schema Passwords, Map Tablespaces, Summary, and Completion Summary. The main content area has the following fields:
 

- Database Type:** A dropdown menu set to 'Oracle Database'.
- Host Name:** A text box containing 'username-pc'. Below it, a note states: 'For RAC database, specify VIP name or one of the Node name as Host name. For SCAN enabled RAC database, specify SCAN host as Host name.'
- Port:** A text box containing '1522'.
- Service Name:** A text box containing 'XE'.
- Username:** A text box containing 'SYS'. Below it, a note states: 'User with DBA or SYSDBA privileges. Example:sys'.
- Password:** A text box with masked characters (dots).
- Role:** A dropdown menu set to 'SYSDBA'. Below it, a note states: 'One or more components may require SYSDBA role for the operation to succeed.'
- Messages:** An empty text area for displaying messages.

 At the bottom, there is a 'Help' button on the left and a group of navigation buttons on the right: '< Back', 'Next >', 'Finish', and 'Cancel'.

Oracle Fusion Middleware: Repository Creation Utility - Create Repository page (Step 2 of 7): Database Connection Details

6. On the Create Repository (Step 2 of 7) - Database Connection Details page, do the following:
- In the Database Type field, select the database type to store the metadata services repository from the drop-down list box.

For example: *Oracle Database*

This changes the database connection information that the utility requires (only Oracle connection information is shown).

For most installations, you select the PeopleSoft database. However, you can choose a database other than the PeopleSoft database if you prefer. This database stores metadata for the OWSM system.

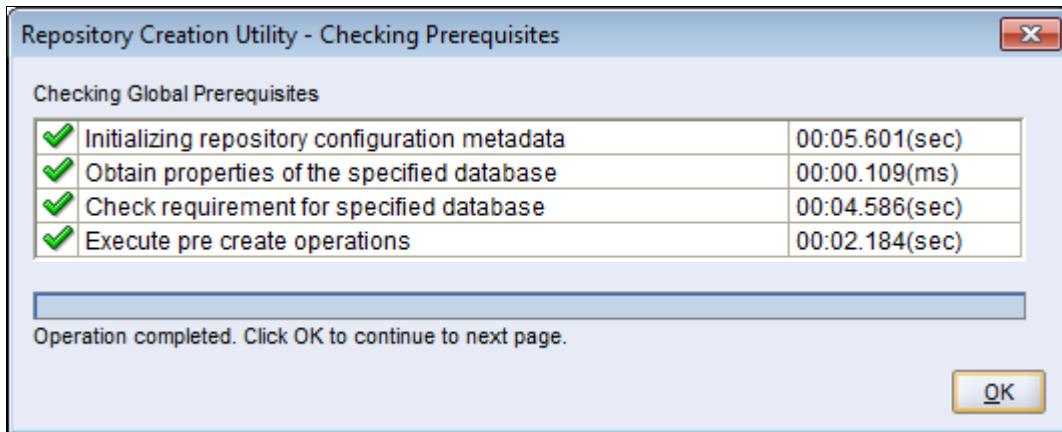
- Complete the database location and user information, based on the type of database that you select.

**Note.** The utility must create tables and table spaces. Therefore, the user ID and password that you enter must have DBA or SYSDBA privileges.



- c. Click Next.

The Repository Creation Utility - Checking Prerequisites page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Checking Prerequisites page

7. On the Repository Creation Utility - Checking Prerequisites page, RCU determines if the database meets the minimum requirements to create the repository and connection. After this process completes, click OK.

The Repository Creation Utility - Create Repository (Step 3 of 7) - Select Components page appears, as shown in the following example:

Repository Creation Utility - Step 3 of 7: Select Components

**Select Components**

A Prefix groups the components associated with one deployment.

☐ Select an existing Prefix

☒ Create a new Prefix

DEV

Prefix can contain only alpha-numeric characters. Prefix should not start with a number and should not contain any special characters.

Component	Schema Owner
<input type="checkbox"/> Oracle AS Repository Components	
<input checked="" type="checkbox"/> AS Common Schemas	
<input checked="" type="checkbox"/> Metadata Services	DEV_MDS
<input type="checkbox"/> Audit Services	IAU
<input type="checkbox"/> Audit Services For OES	IAUOES
<input type="checkbox"/> Enterprise Scheduler Service	ESS
<input type="checkbox"/> Oracle Platform Security Services	OPSS
<input checked="" type="checkbox"/> Identity Management	
<input checked="" type="checkbox"/> WebCenter Content	
<input checked="" type="checkbox"/> Oracle Data Integrator	
<input checked="" type="checkbox"/> Oracle Business Intelligence	
<input checked="" type="checkbox"/> WebLogic Communication Services	

Messages:

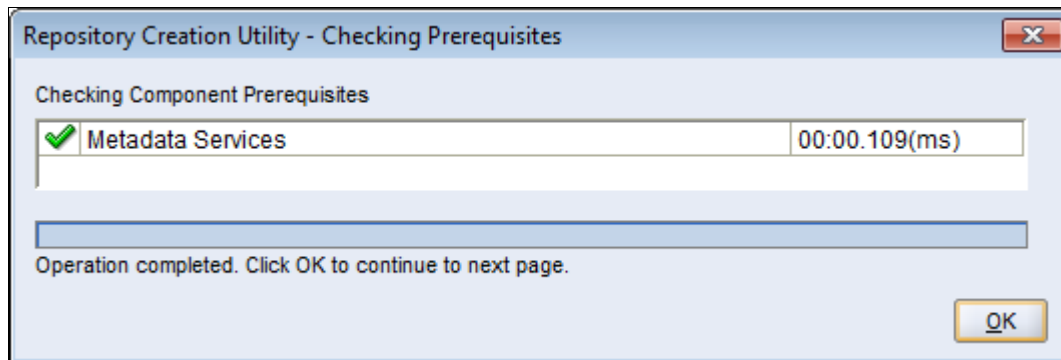
Help < Back Next > Finish Cancel

Oracle Fusion Middleware: Repository Creation Utility (Step 3 of 7) - Select Components page

8. On the Repository Creation Utility (Step 3 of 7) - Select Components page, select the option *Create a new Prefix*, and then enter *DEV* in the adjacent field.
9. In the Component section, expand the AS Common Schemas and select the Metadata Services check box. The Schema Owner column automatically populates. This is the only component that you need to create.

## 10. Click Next.

The Repository Creation Utility - Checking Prerequisites page appears, as shown in the following example:



Repository Creation Utility - Checking Prerequisites page

11. On the Repository Creation Utility - Check Prerequisites page, RCU validates that the database is capable of creating the components that you select. After this process completes, click OK.

The Repository Creation Utility (Step 4 of 7) - Schema Passwords page appears, as shown in the following example:

**Schema Passwords**

Please enter the passwords for the main and additional (auxiliary) schema users. Password can contain alphabets, numbers and the following special characters: \$, #, \_ . Password should not start with a number or a special character.

☒ Use same passwords for all schemas

    Password:

    Confirm Password:

☐ Use main schema passwords for auxiliary schemas

☐ Specify different passwords for all schemas

Component	Schema Owner	Schema Password	Confirm Password
Metadata Services	DEV_MDS		

Messages:

Help      < Back    Next >    Finish    Cancel

Oracle Fusion Middleware: Repository Creation Utility (Step 4 of 7) - Schema Passwords page

12. On the Repository Creation Utility (Step 4 of 7) - Schema Passwords page, accept the default option *Use same passwords for all schemas*, and then enter and confirm your password. The system uses this password in the next task when you install OWSM.

Alternatively, you can select the options *Use main schema passwords for auxiliary schemas* or *Specify different passwords for all schemas*, and then enter and confirm your passwords accordingly.

## 13. Click Next.

The Repository Creation Utility (Step 5 of 7) - Map Tablespaces page appears, as shown in the following example:

**Repository Creation Utility - Step 5 of 7 : Map Tablespaces**

**Map Tablespaces**

Welcome  
Create Repository  
Database Connection Details  
Select Components  
Schema Passwords  
**Map Tablespaces**  
Summary  
Completion Summary

Choose tablespaces for the selected components. The default and temporary tablespaces are specified in the table below.  
To create new tablespaces or modify existing tablespaces click the 'Manage Tablespaces' button.

Component	Schema Owner	Default Tablespace	Temp Tablespace
Metadata Services	DEV_MDS	*DEV_MDS	*DEV_IAS_TEMP

\* Default tablespaces (specified in the configuration files) are to be created upon confirmation.

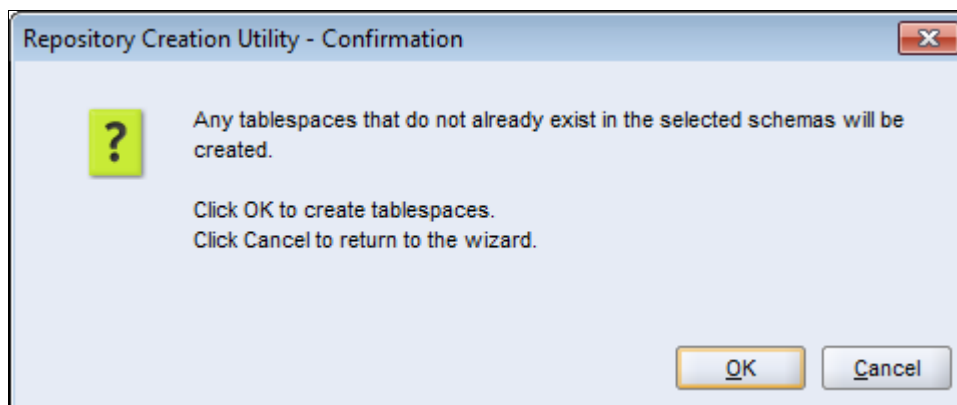
[Manage Tablespaces](#)

Messages:

[Help](#) [< Back](#) [Next >](#) [Finish](#) [Cancel](#)

Oracle Fusion Middleware: Repository Creation Utility (Step 5 of 7) - Map Tablespaces page

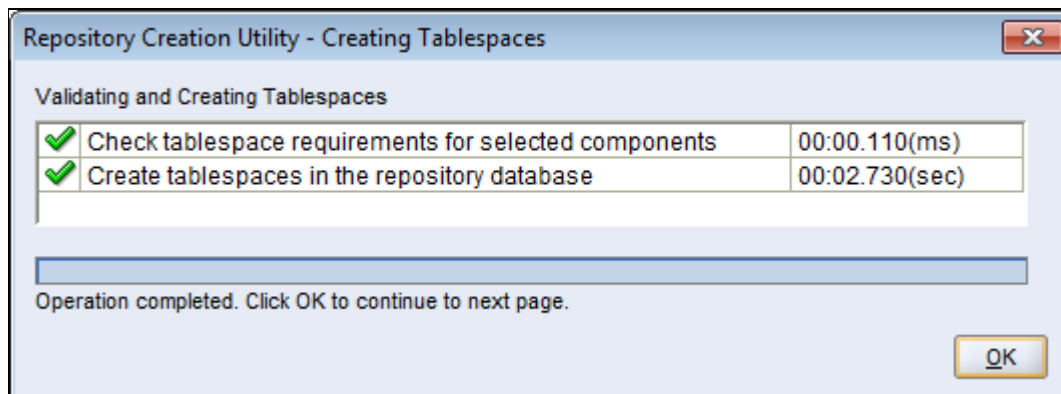
14. The Repository Creation Utility (Step 5 of 7) - Map Tablespaces page displays the default and temporary tablespaces that the system uses for the component that you are installing. Accept the defaults and click Next. A message box appears that states "Any tablespaces that do not already exist in the selected schemas will be created," as shown in the following example:



Repository Creation Utility - Message box

15. On the Repository Creation Utility message box, click OK to create the tablespaces.

The Repository Creation Utility - Creating Tablespaces page appears, as shown in the following example:



Repository Creation Utility - Creating Tablespaces page

16. On the Repository Creation Utility - Creating Tablespaces page, the Oracle RCU validates and executes the tablespace creation.

After this process completes, click OK.

The Repository Creation Utility (Step 6 of 7) - Summary page appears and displays the complete settings for the database and component that you are installing, as shown in the following example:

**Summary**

Database details:

Host Name: username-pc  
Port: 1522  
Service Name: XE  
Connected As: SYS  
Operation: Create

Prefix for (prefixable) Schema Owners:DEV

Component	Schema Owner	Tablespace Type	Tablespace Name
Metadata Services	DEV_MDS	Default	DEV_MDS
		Temp	DEV_IAS_TEMP
		Additional	None

Buttons: Help, < Back, Next >, Create, Cancel

Oracle Fusion Middleware: Repository Creation Utility (Step 6 of 7) - Summary page

17. On the Repository Creation Utility (Step 6 of 7) - Summary page, click Create to begin the repository creation process.

The Repository Creation Utility (Step 7 of 7) - Completion Summary page appears and displays the metadata component's successful installation, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility (Step 7 of 7) - Completion Summary page

18. On the Repository Creation Utility (Step 7 of 7) - Completion Summary page, click the Close button to complete and exit the installation.

## Task 20-1-2: Installing the Oracle Web Services Manager

The Oracle Web Services Manager (OWSM) applies client policies on the PeopleSoft Mobile Inventory Management application. OWSM requires access to a database and supports Oracle, Microsoft SQL Server, DB2 z/OS or DB2 LUW. You can use any compatible database. Using the PeopleSoft database for OWSM is not a requirement, but is acceptable and does not impact the production system.

You can install OWSM from the Quick Start installation program that installs the Oracle Enterprise Manager.

To install OWSM:

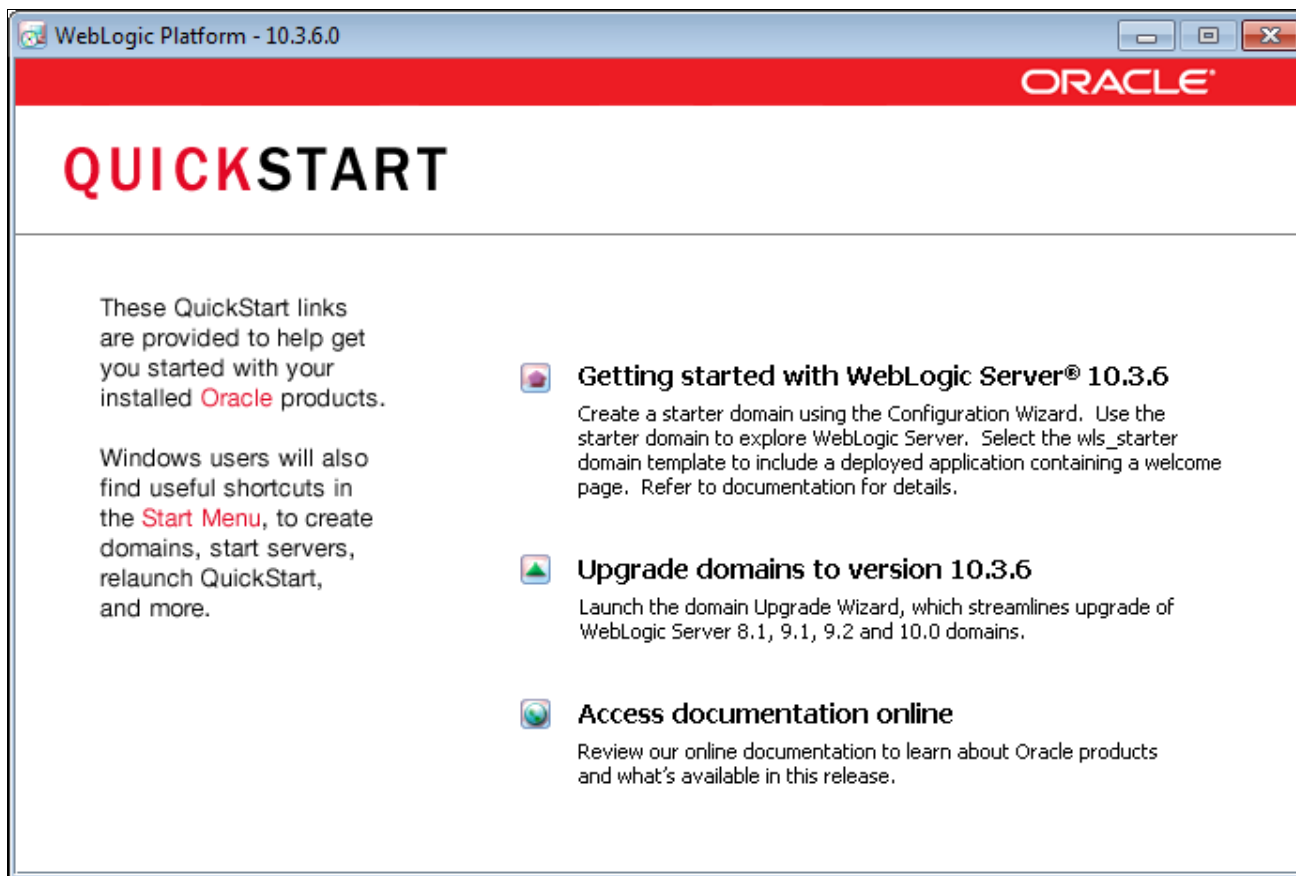


1. Use the menu options from the Program Group to select Oracle WebLogic, QuickStart, as shown in the following example:



Oracle WebLogic - Menu navigation from the Program Group to access QuickStart

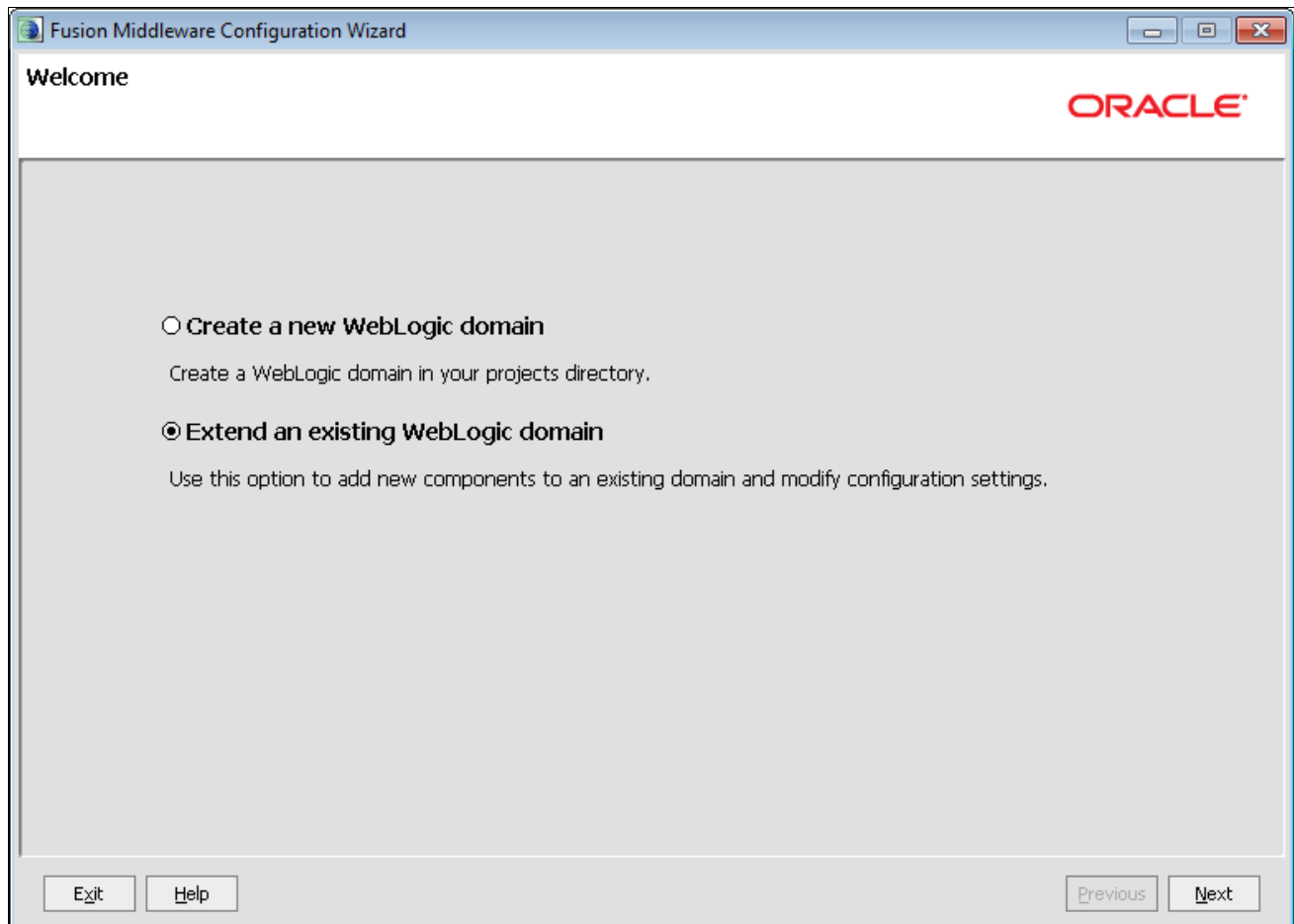
The WebLogic Platform - QuickStart page appears, as shown in the following example:



WebLogic Platform - QuickStart page

2. From the QuickStart Main Menu page, click the option *Getting started with WebLogic Server 10.3.6*.

The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:

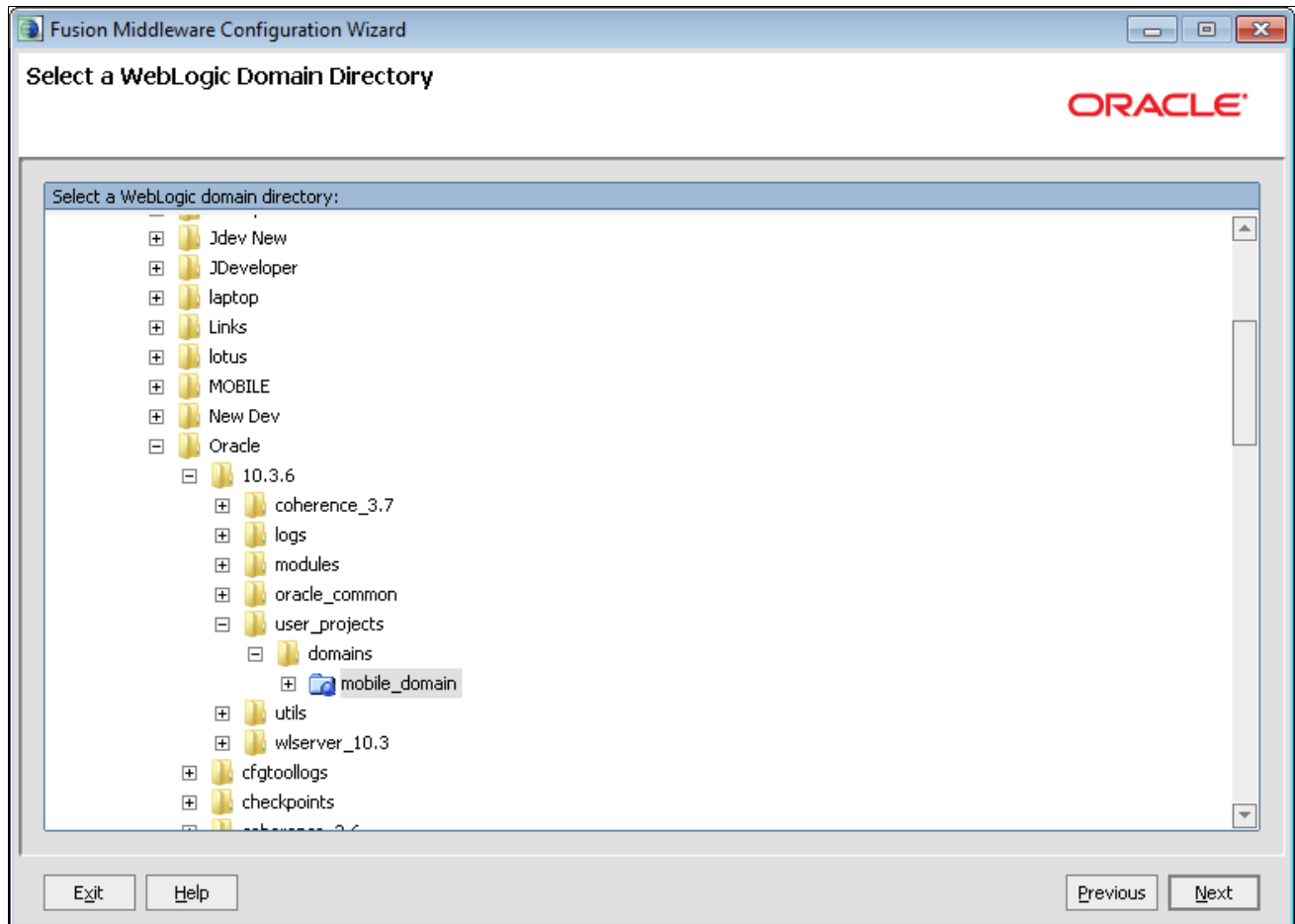


Fusion Middleware Configuration Wizard - Welcome page

3. On the Welcome page, select the option *Extend an existing WebLogic domain*.

4. Click Next.

The Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page

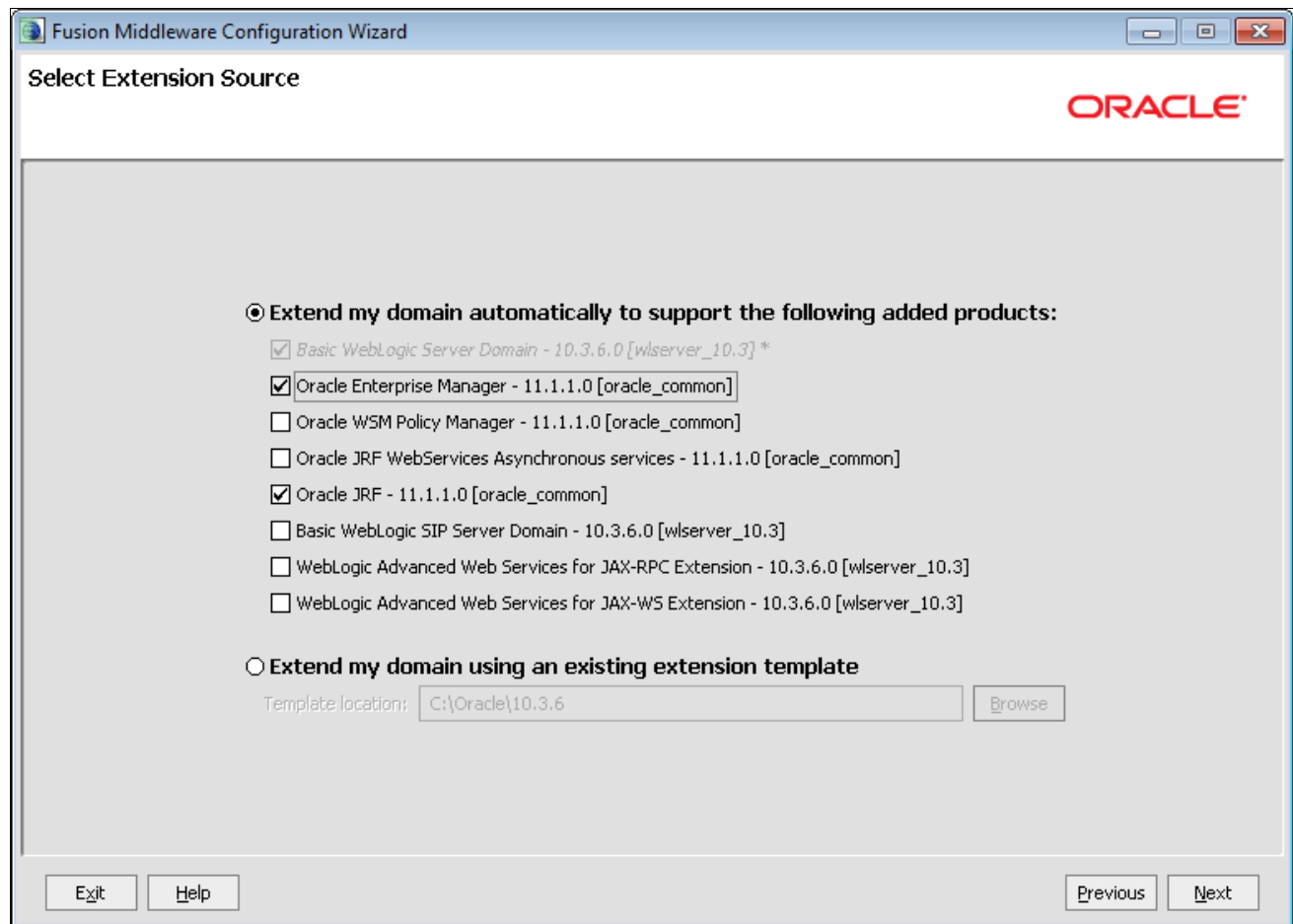
5. On the Select a WebLogic Domain Directory page, select the domain for your PeopleSoft Mobile Inventory Management application.

The domain is under the directory that you created when performing step 4 of the task titled "Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management," discussed earlier in the chapter titled "Installing PeopleSoft 9.2 Mobile Inventory Management".

The domain name was entered in step 7 of the task titled "Starting the Configuration Wizard to Define a New Domain," discussed earlier in the chapter titled "Installing PeopleSoft 9.2 Mobile Inventory Management."

## 6. Click Next.

The Fusion Middleware Configuration Wizard - Select Extension Source page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Extension Source page

7. On the Select Extension Source page, select the option *Extend my domain automatically to support the following added products*, and then select the check box for the *Oracle WSM Policy Manager – 11.1.1.0 (oracle\_common)* product.

## 8. Click Next.

The Fusion Middleware Configuration Wizard - Configure JDBC Component Schema page appears, as shown in the following example:

**Note:** Change only the input fields below that you wish to modify and values will be applied to all selected rows.

Vendor:  DBMS/Service:

Driver:  Host Name:

Schema Owner:  Port:

Schema Password:

RAC configuration for component schemas:

☐ Convert to GridLink ☐ Convert to RAC multi data source ☐ Don't convert

	Component Schema	DBMS/Service	Host Name	Port	Schema Owner	Schema Password
<input checked="" type="checkbox"/>	OWSM MDS Schema	XEXDB	USERNAME-PC.people	1522	DEV_MDS	*****

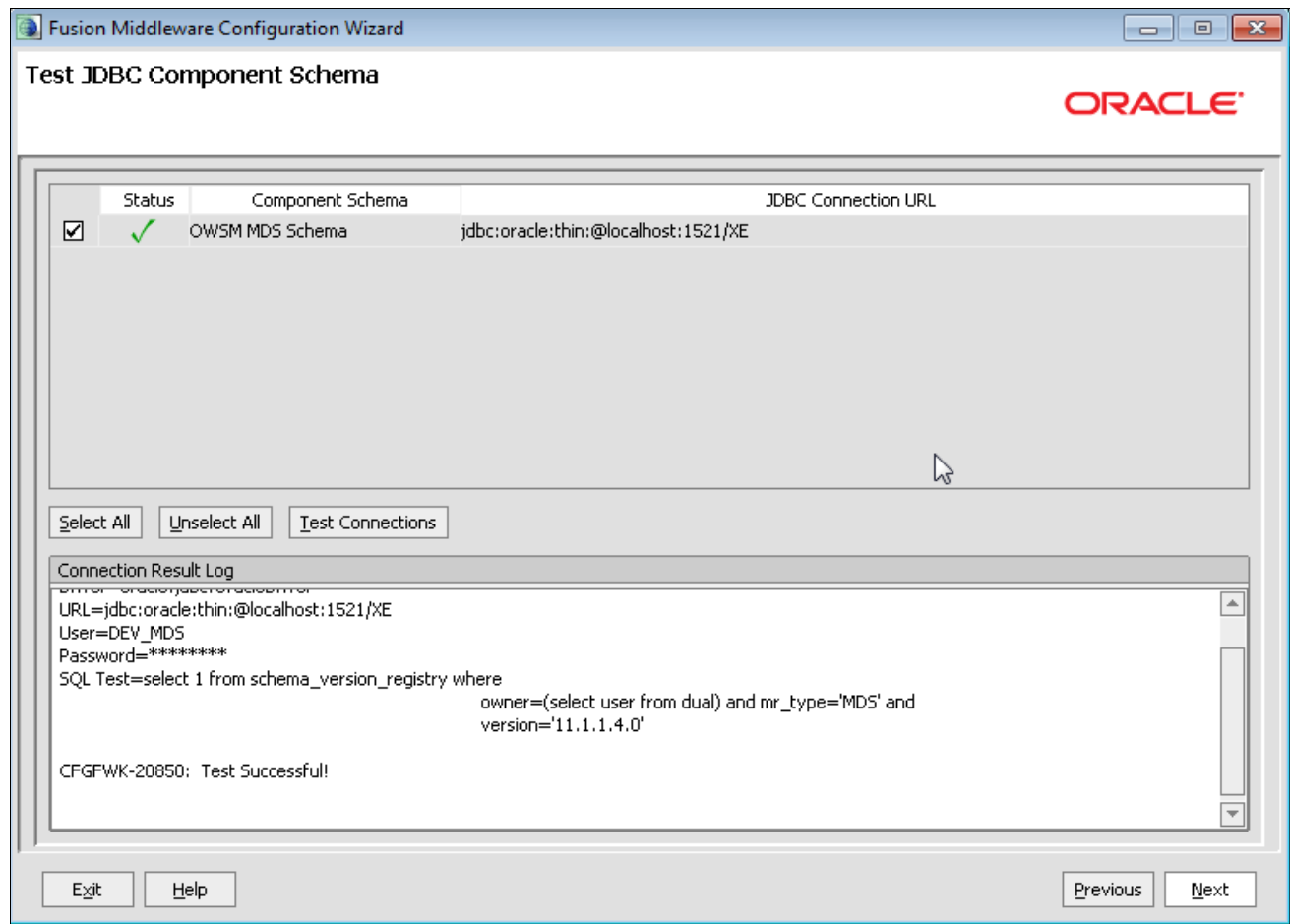
Exit Help Previous Next

Fusion Middleware Configuration Wizard - Configure JDBC Component Schema page

9. On the Configure JDBC Component Schema page, the information that you enter must match the information in the preceding task titled "Running the Oracle Repository Creation Utility."

## 10. Click Next.

The Fusion Middleware Configuration Wizard - Test JDBC Component Schema page appears, as shown in the following example:

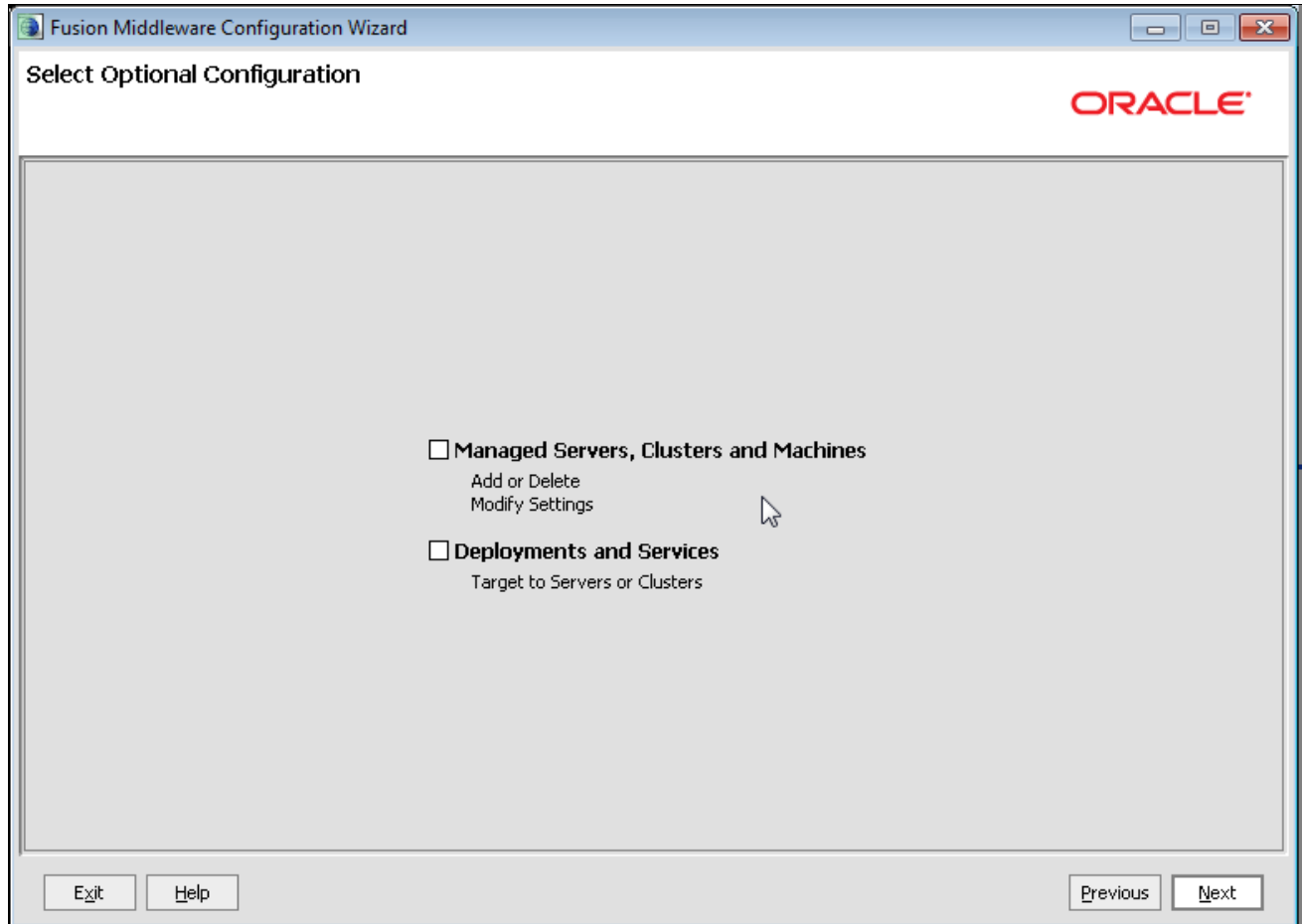


Fusion Middleware Configuration Wizard - Test JDBC Component Schema page

11. The Test JDBC Component Schema page requires no action. Click Next.

The Test JCBC Component Schema page confirms that the information on the Configure JDBC Component Schema page is correct to use when installing the OWSM Policy Manager.

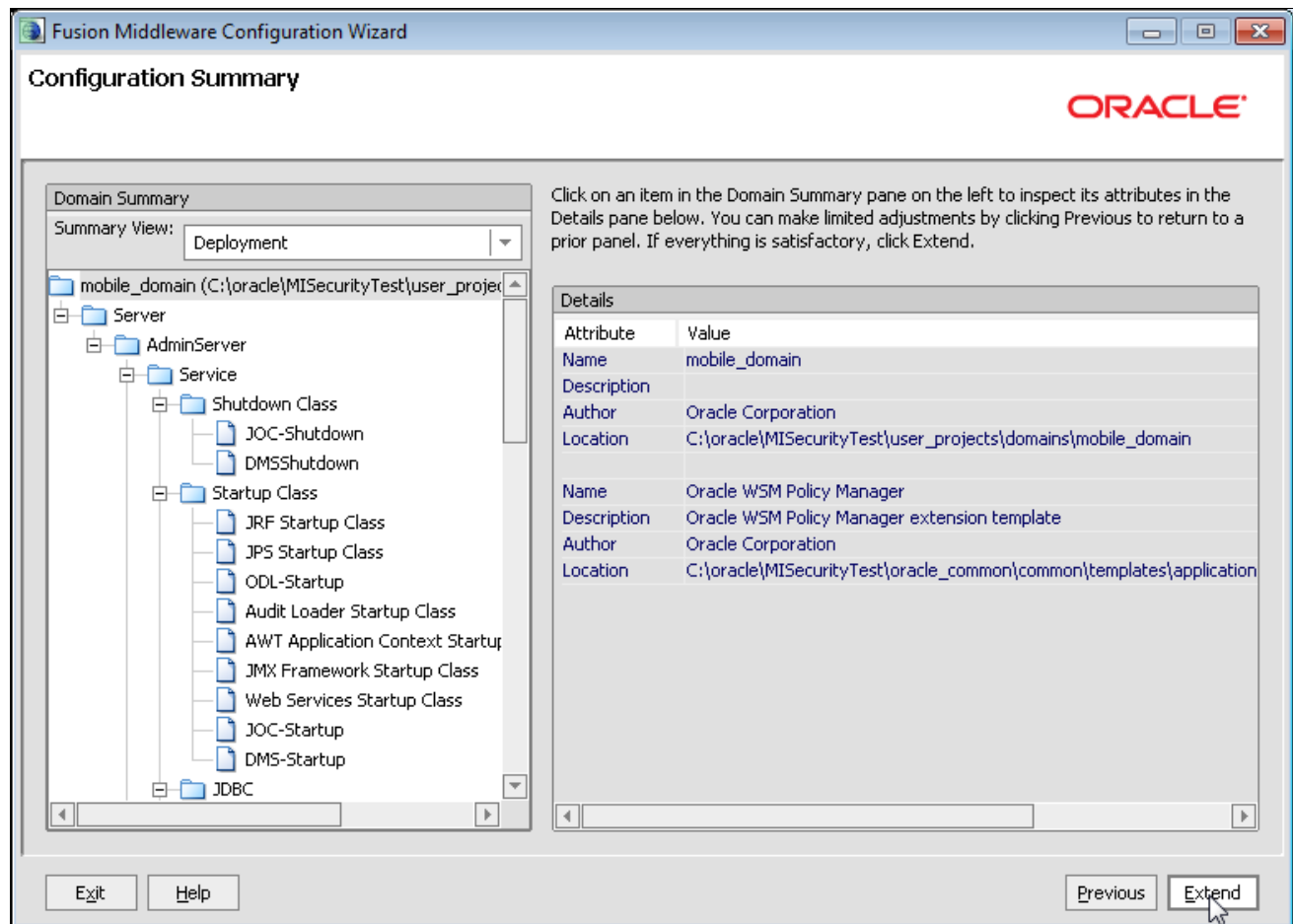
The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

12. Leave the configuration check boxes clear (do not select) and click Next.

The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:

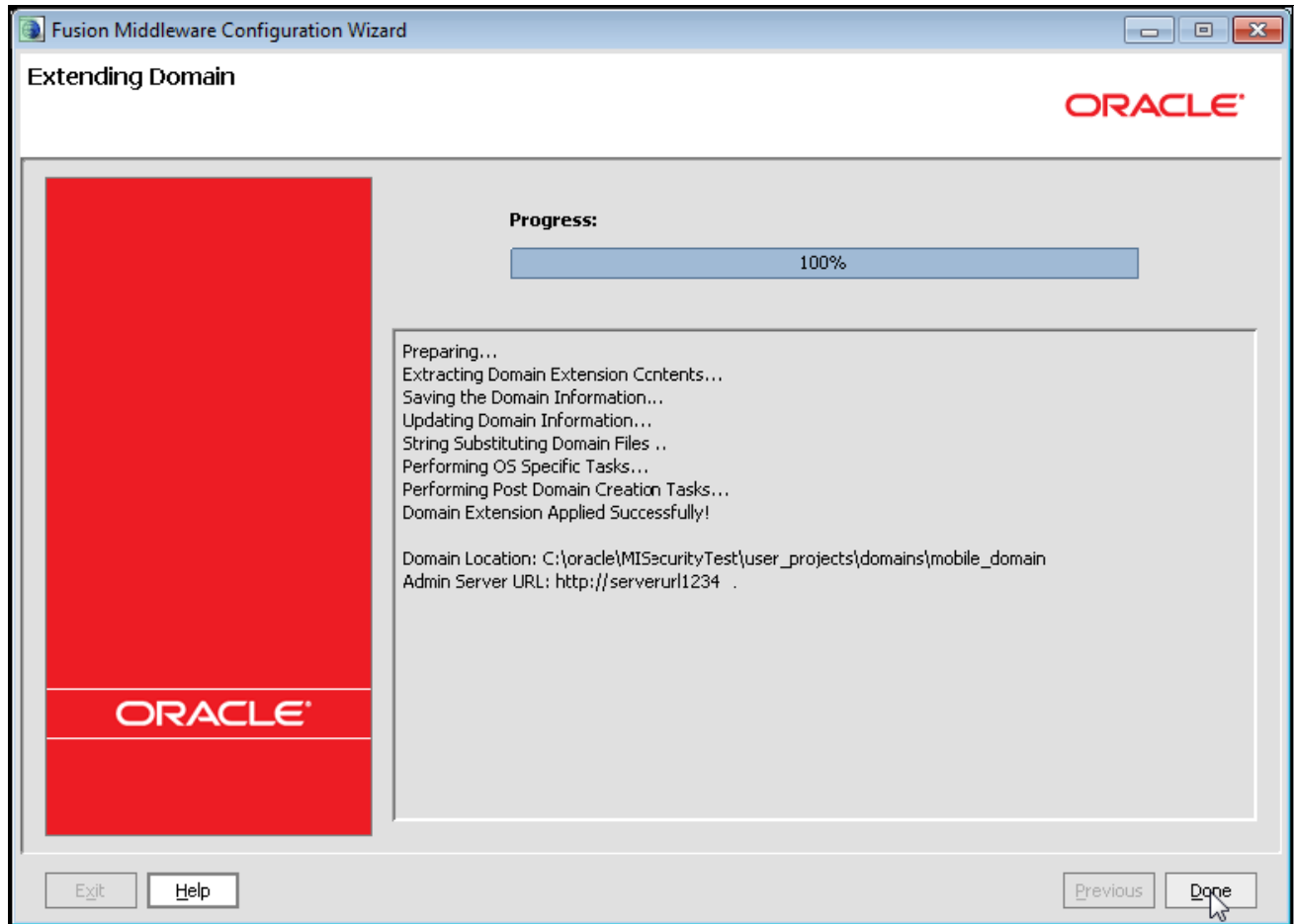


Fusion Middleware Configuration Wizard - Configuration Summary page



13. On the Configuration Summary page, verify the details of the domain and components that you selected for installation, and then click the Extend button to continue the installation.

The Fusion Middleware Configuration Wizard - Extending Domain Progress page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Extending Domain Progress page

The Extend Domain page shows the progress and details of the installation.

14. When the progress reaches 100%, click the Done button to complete the installation and exit the Configuration Wizard.

### Task 20-1-3: Configuring the Certificates

This section discusses:

- Understanding Configuring the Certificates
- Creating the default-keystore.jks File on the Mobile Server
- Generating or Importing the Certificate into the Default-Keystore
- Exporting the mobileserv Public Key Certificate
- Importing the mobileserv Certificate into the Interop Keystore
- Generating the Encryption Keypair in the Interop Keystore

- Exporting the Encryption and Root Node Certificates
- Copying the Encryption and Root Certificate Files to the Mobile Server

## Understanding Configuring the Certificates

Configuring the certificates between the PeopleSoft Mobile Inventory Management server and the PeopleSoft Integration Gateway involves populating keystores and generating public certificates that you copy between the servers.

Keytool is a utility that Oracle delivers with Java. The system uses this utility to manage the import and export of certificates from the keystores. You must have access to the Keytool utility from the Mobile Server Install and the PeopleSoft Install to continue with the installation.

## Creating the default-keystore.jks File on the Mobile Server

The mobile system looks for credentials in the default-keystore.jks file that is in the subdirectory mobile-domain\config\fmwconfig. The system creates this file when importing the keypair.

If you do not have an x.509 certificate, you can generate one using the Keytool utility.

---

**Note.** Oracle does not recommend that you secure your production system with generated self-signed certificates.

---

In the instructions that follow, Oracle provides an alias name of *mobileserv* to the certificate. The system uses this alias when importing the certificate to the keystore on the PeopleSoft Gateway and when configuring SAML in the PeopleSoft security system. You can change this alias, just be aware that these installation instructions refer to the alias as *mobileserv*.

## Generating or Importing the Certificate into the Default-Keystore

To generate or import the certificate into the default-keystore:

1. Run this step on the PeopleSoft Mobile Inventory Management server on the command line in the subdirectory:  
mobile\_domain\config\fmwcong
2. Do one of the following:
  - If you have a keypair certificate from a certificate authority, you do not need to create a certificate in this step. Simply import your keypair certificate into the default-keystore.jks file.
  - If you want to generate a self-signing certificate, run the following from the command line:  

```
Keytool -genkey -alias mobileserv -keyalg RSA -dname"CN=[machine name],
OU=[Org Unit], O=[Org], L=[Location],ST=[2 letter abbreviation for
state], C=[2 letter abbrevication for country]" -keypass [password] -
keystore default-keystore.jks -storepass [password]
```
3. If you have a certificate, import your certificate into the default keystore using the *-import* option:  

```
Keytool -imoprtcert -alias mobileserv -file [certificate file] -keypass
[password] default-keystore.jks -storepass [password]
```

At this point in the installation, the system creates the default-keystore.jks file that contains the keypair certificate for the PeopleSoft Mobile Inventory Management server.

4. Verify that the keystore is set up correctly by running the list command to see the contents of the keystore.

The following example shows the list command and the output identifying 1 entry, *mobileserv*:

```

C:\windows\system32\cmd.exe

C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>C:\Oracle\
Java\bin\keytool -list -keystore default-keystore.jks -storepass welcome1

Keystore type: JKS
Keystore provider: SUN

Your keystore contains 3 entries

rootca, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): 05:58:F8:FF:43:EA:74:48:9A:44:24:4A:9E:5C:72:19:
93:51:91:9C
mobileserv, Sep 25, 2012, PrivateKeyEntry,
Certificate fingerprint (SHA1): 3C:88:C4:64:6F:CE:42:70:91:DA:3F:A0:43:BA:CB:DA:
9A:69:49:4B
om920dul, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): DF:DA:7F:50:65:75:24:74:E6:AD:80:5F:BB:9E:77:3B:
64:9D:36:71

C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>_

```

Command Window - Default-keystore.jks list

## Exporting the mobileserv Public Key Certificate

To export the *mobileserv* public key certificate:

1. Run this step on the PeopleSoft Mobile Inventory Management server on the command line in the following subdirectory:  
mobile\_domain\config\fmwcong
2. To create the mobileserv.cer file, enter the following command:  
Keytool -exportcert -v -alias mobileserv -keystore default-keystore.jks -storepass [password] -rfc -file mobileserv.cer
3. Copy the mobileserv.cer file to the following subdirectory:  
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes  
This is the directory that contains the PeopleSoft keystore file *interop.jks* that Oracle delivers.

## Importing the mobileserv Certificate into the Interop Keystore

To import the *mobileserv* certificate into the interop keystore:

1. Run this step from the command line in the following subdirectory:  
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
2. Run the command to import the mobileserv certificate into the PeopleSoft keystore, interop.jks. The certificate should be in the file *mobileserv.cer* that you copied in step 3 of the preceding subtask ("Exporting the mobileserv Public Key Certificate").

```
Keytool -importcert -alias mobileserv -file mobileserv.cer -keystore  
[password]-keystore interop.jks -storepass interop
```

3. Click *Yes* to trust the certificate.

## Generating the Encryption Keypair in the Interop Keystore

The encryption node keypair encrypts the public key information in the soap header. The alias name for the encryption key should be the same as the default local node for the PeopleSoft system.

To generate the encryption keypair in the interop keystore:

1. Run this step from the command line in the following subdirectory:

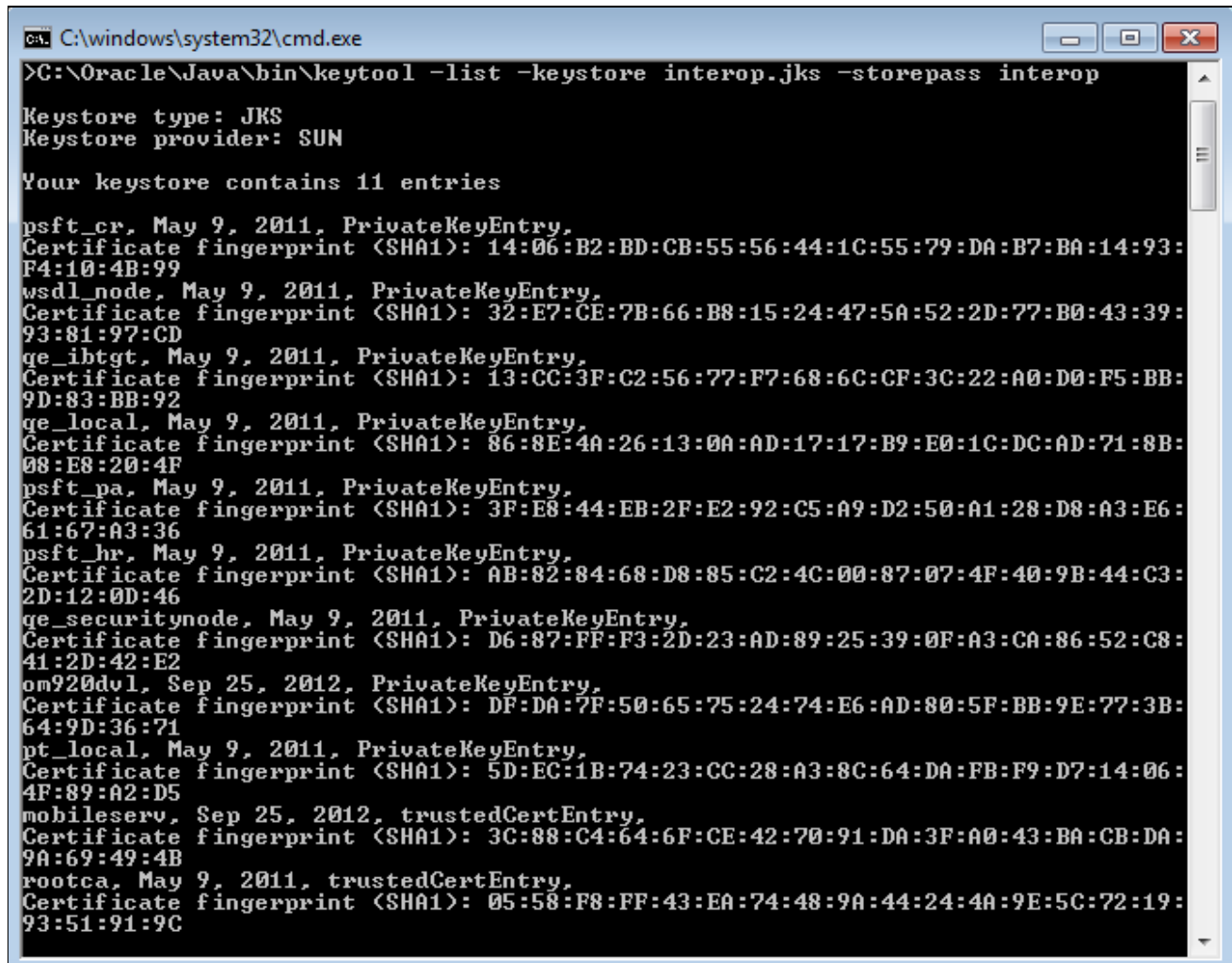
```
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
```

2. Run the following command:

```
keytool -genkeypair -alias [default local node name] -keyalg RSA -dname  
"CN=[machine name], OU=[Org Unit], O=[Org], L=[Location], ST=[2 letter  
abbreviation for state], C=[2 letter abbrevication for country]" -keystore  
interop.jks -storepass interop
```

At this point, the mobileserv and default local encryption certificates are in the interop.jks keystore.

3. Verify that the import was successful by running the keystore `-list` command, as shown in the following example:



```

C:\windows\system32\cmd.exe
>C:\Oracle\Java\bin\keytool -list -keystore interop.jks -storepass interop

Keystore type: JKS
Keystore provider: SUN

Your keystore contains 11 entries

psft_cr, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 14:06:B2:BD:CB:55:56:44:1C:55:79:DA:B7:BA:14:93:
F4:10:4B:99
wsdl_node, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 32:E7:CE:7B:66:B8:15:24:47:5A:52:2D:77:B0:43:39:
93:81:97:CD
qe_ibtgt, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 13:CC:3F:C2:56:77:F7:68:6C:CF:3C:22:A0:D0:F5:BB:
9D:83:BB:92
qe_local, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 86:8E:4A:26:13:0A:AD:17:17:B9:E0:1C:DC:AD:71:8B:
08:E8:20:4F
psft_pa, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 3F:E8:44:EB:2F:E2:92:C5:A9:D2:50:A1:28:D8:A3:E6:
61:67:A3:36
psft_hr, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): AB:82:84:68:D8:85:C2:4C:00:87:07:4F:40:9B:44:C3:
2D:12:0D:46
qe_securitynode, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): D6:87:FF:F3:2D:23:AD:89:25:39:0F:A3:CA:86:52:C8:
41:2D:42:E2
om920dul, Sep 25, 2012, PrivateKeyEntry,
Certificate fingerprint (SHA1): DF:DA:7F:50:65:75:24:74:E6:AD:80:5F:BB:9E:77:3B:
64:9D:36:71
pt_local, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 5D:EC:1B:74:23:CC:28:A3:8C:64:DA:FB:F9:D7:14:06:
4F:89:A2:D5
mobileserv, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): 3C:88:C4:64:6F:CE:42:70:91:DA:3F:A0:43:BA:CB:DA:
9A:69:49:4B
rootca, May 9, 2011, trustedCertEntry,
Certificate fingerprint (SHA1): 05:58:F8:FF:43:EA:74:48:9A:44:24:4A:9E:5C:72:19:
93:51:91:9C
  
```

Command Window - Keystore list command displaying the contents of interop.jks

## Exporting the Encryption and Root Node Certificates

To export the encryption and root node certificates:

1. Run this step from the command line in the following subdirectory:

```
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
```

2. Export the public key and root certificate for encryption from the interop.jks keystore using the keytool `-exportcert` command, as follows:

```
keytool -exportcert -v -alias rootca -keystore interop.jks -storepass
interop -rfc -file rootca.cer
```

```
keytool -exportcert -v -alias [default local node name] -keystore
interop.jks -storepass interop -rfc -file [default local node name].cer
```

## Copying the Encryption and Root Certificate Files to the Mobile Server

To copy the encryption and root certificate files to the PeopleSoft Mobile Inventory Management server:

1. Run this step from the command line in the following subdirectory:  
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
2. Copy the two certificate files to the following subdirectory:  
mobile-domain\config\fmwconfig
3. Run the steps that follow on the PeopleSoft Mobile Inventory Management server on the command line in the following subdirectory:  
mobile\_domain\config\fmwcong
4. Run the following commands:  

```
keytool -importcert -alias rootca -file rootca.cer-keystore default-keystore.jks -storepass [password]
```

Click *Yes* to trust this certificate.

```
keytool -importcert -alias [default local node name] -file [default local node name].cer -keystore default-keystore.jks -storepass [password]
```

Click *Yes* to trust this certificate.
5. Verify that the import was successful by running the `keytool -list` command, as shown in the following example:

```
C:\windows\system32\cmd.exe

C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>C:\Oracle\Java\bin\keytool -list -keystore default-keystore.jks -storepass welcome1

Keystore type: JKS
Keystore provider: SUN

Your keystore contains 3 entries
rootca, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): 05:58:F8:FF:43:EA:74:48:9A:44:24:4A:9E:5C:72:19:
93:51:91:9C
mobilesrv, Sep 25, 2012, PrivateKeyEntry,
Certificate fingerprint (SHA1): 3C:88:C4:64:6F:CE:42:70:91:DA:3F:A0:43:BA:CB:DA:
9A:69:49:4B
om920dvl, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): DF:DA:7F:50:65:75:24:74:E6:AD:80:5F:BB:9E:77:3B:
64:9D:36:71

C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>
```

Command Window - List view of the default-keystore.jks

At this point, both keystores, the default-keystore.jks and interop.jks should contain the following three certificates:

- rootca

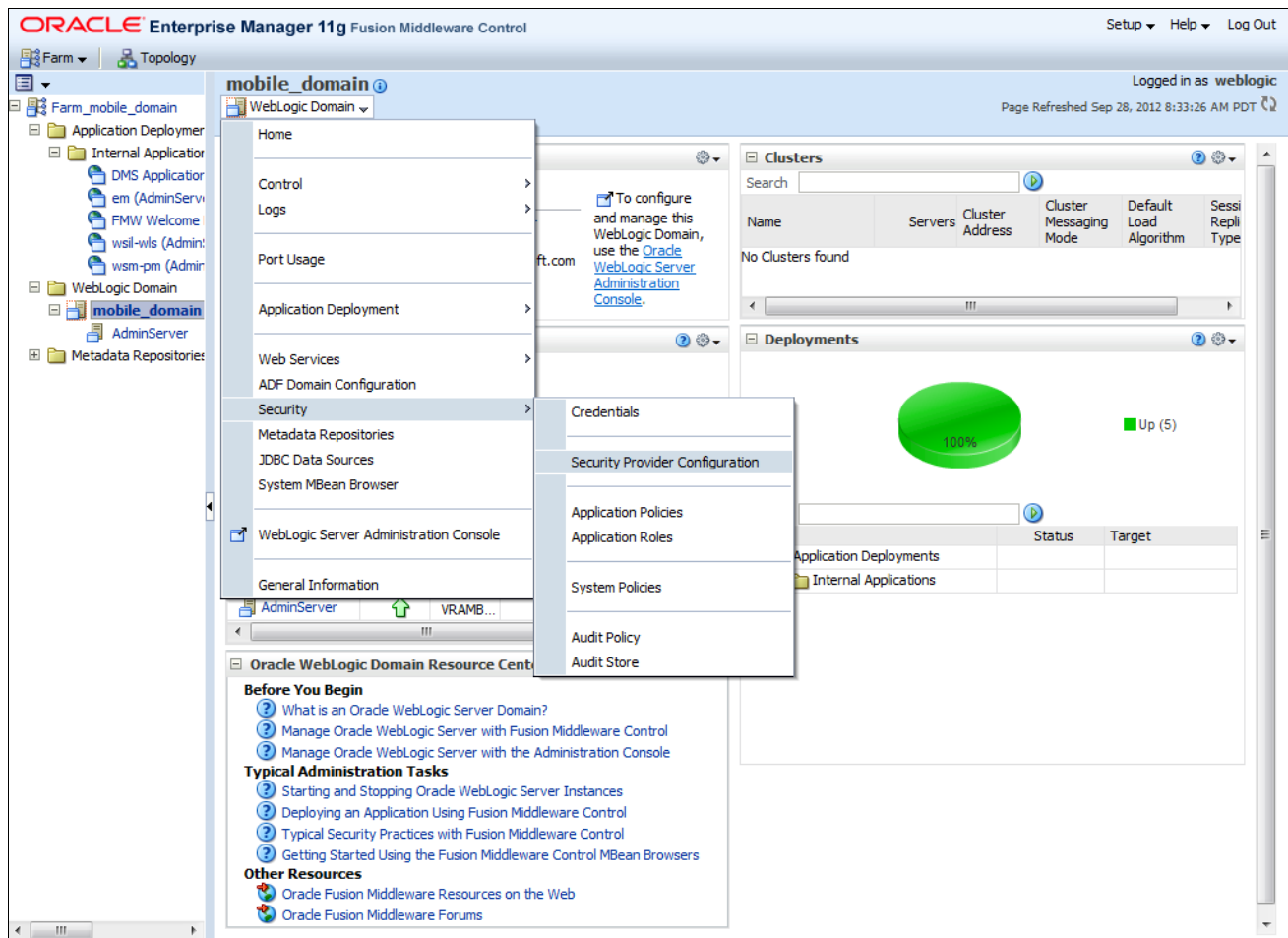
- mobileserv
- [default local node name]

### **Task 20-1-4: Creating and Configuring the Keystore and Credential Store**

To create and configure the credential store on the PeopleSoft Mobile Inventory Management server:

1. Start the Oracle Enterprise Manager for the PeopleSoft Mobile Inventory Management server domain.

- From the Oracle Enterprise Manager menu, select WebLogic Domain, Security, Security Provider to access the Security Provider Configuration page, as the navigation shows in the following example:



Oracle Enterprise Manager - Farm Tree menu navigation to access the Security Provider Configuration page

The Oracle Enterprise Manager - Security Provider Configuration page appears, as shown in the following example:



**ORACLE Enterprise Manager 11g Fusion Middleware Control** Setup Help Log Out

Farm Topology

mobile\_domain WebLogic Domain

Logged in as weblogic  
Page Refreshed Sep 28, 2012 8:37:06 AM PDT

### Security Provider Configuration

Use this page to configure global management domain policy and credential store providers, keystore and login modules used by Web Services Manager.

#### Security Stores

Current policy and credential store providers are shown below. To migrate the current policy and credential providers use the Change Store Type button.

Change Store Type Edit

Name	Store Type	Location
Policy Store		system-jazn-data.xml
Credential Store	File	cwallet.sso
Keystore		keystores.xml

#### Identity Store Provider

#### Web Services Manager Authentication Providers

You can configure the login modules and keystore for Web Services Manager authentication.

#### Login Modules

The following table lists all configured login modules for Web Services Manager. Use this list to create, configure or delete a login module.

Create... Edit... Delete...

Name	Class	Control Flag	Description
saml.loginmodule	oracle.security.jps.internal.jaas.module.saml.JpsSAMLLoginMod...	Required	SAML Login Module
saml2.loginmodule	oracle.security.jps.internal.jaas.module.saml.JpsSAML2LoginMo...	Required	SAML2 Login Module
krb5.loginmodule	com.sun.security.auth.module.Krb5LoginModule	Required	Kerberos Login Module
digest.authenticator.l...	oracle.security.jps.internal.jaas.module.digest.DigestLoginMod...	Required	Digest Authenticator Lo...
certificate.authenticat...	oracle.security.jps.internal.jaas.module.x509.X509LoginModule	Required	X509 Certificate Login M...
wss.digest.loginmodule	oracle.security.jps.internal.jaas.module.digest.WSSDigestLogin...	Required	WSS Digest Login Module
user.authentication.lo...	oracle.security.jps.internal.jaas.module.authentication.JpsUser...	Required	User Authentication Logi...
user.assertion.loginm...	oracle.security.jps.internal.jaas.module.assertion.JpsUserAsse...	Required	User Assertion Login Mo...

#### Keystore

Use this section to specify the keystore used to store public and private keys for all secure connections within the WebLogic Domain. Configure...

Type JKS  
Path ./default-keystore.jks

#### Single Sign-On Provider

#### Advanced Properties

Oracle Enterprise Manager - Security Provider Configuration page

3. On the Security Provider Configuration page, expand the Keystore section and click the Configure button. The Oracle Enterprise Manager - Keystore Configuration page appears, as shown in the following example:

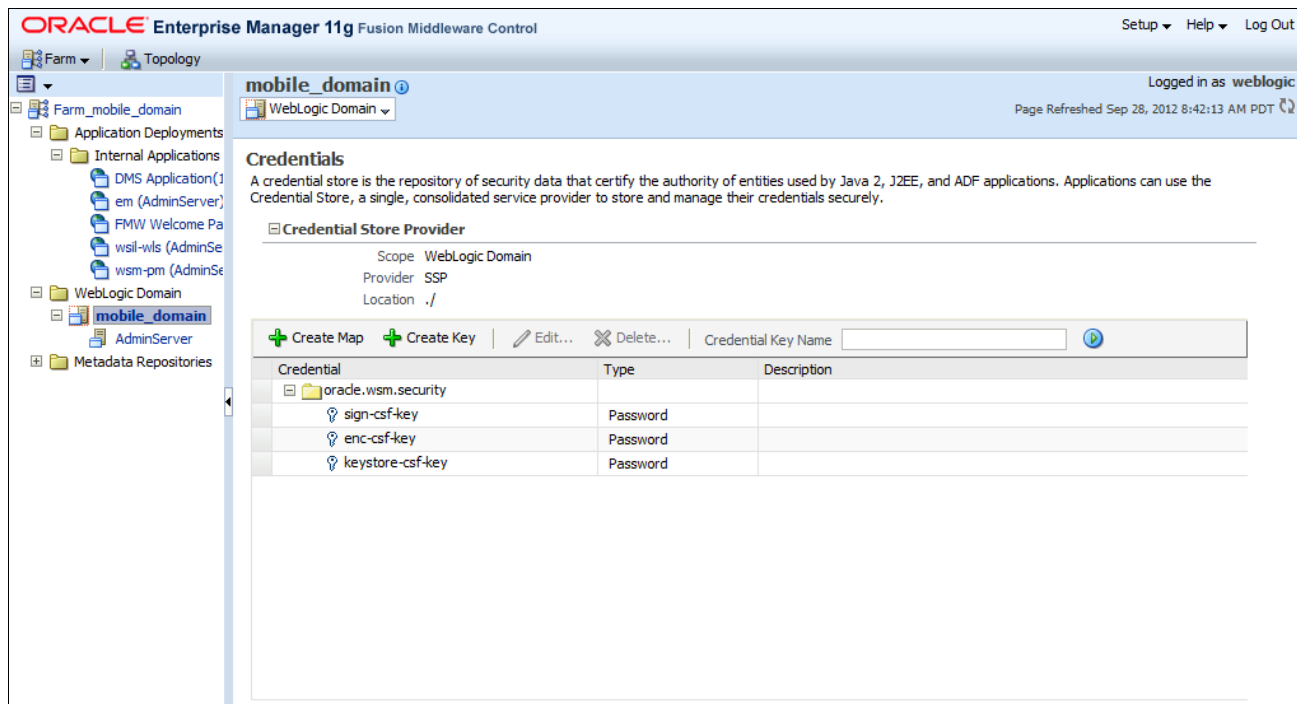
The screenshot displays the Oracle Enterprise Manager 11g Fusion Middleware Control interface. The left-hand tree view shows the hierarchy: Farm > mobile\_domain > WebLogic Domain > mobile\_domain. The main content area is titled 'mobile\_domain' and 'WebLogic Domain'. The breadcrumb trail indicates 'Security Provider Configuration > Configure Key Store'. An information banner states: 'All changes made in this page require a server restart to take effect.' The 'Keystore Configuration' section includes a 'Keystore Type' dropdown set to 'Java Key Store (JKS)'. The 'Access Attributes' section contains fields for 'Keystore Path' (set to './default-keystore.jks'), 'Password', and 'Confirm Password'. The 'Identity Certificates' section is divided into 'Signature Key' and 'Encryption Key' sections, each with fields for 'Key Alias' (set to 'mobileserv'), 'Password', and 'Confirm Password'.

Oracle Enterprise Manager - Keystore Configuration page

4. On the Keystore Configuration page, do the following:
- In the Keystore Type field, select *Java Key Store (JKS)* from the drop-down list box.
  - In the Keystore Path, enter *./default-keystore.jks*.  
The signature and encryption key should be *mobileserv*.
  - In the Password field, enter the password to create the keystore in previous steps.  
The appropriate passwords used to import the certificates should be provided.

5. Access the Credentials page by selecting the domain, then from the menu select Security, Credential.

The Oracle Enterprise Manager - Credentials page appears displaying the Credential Store information, as shown in the following example:

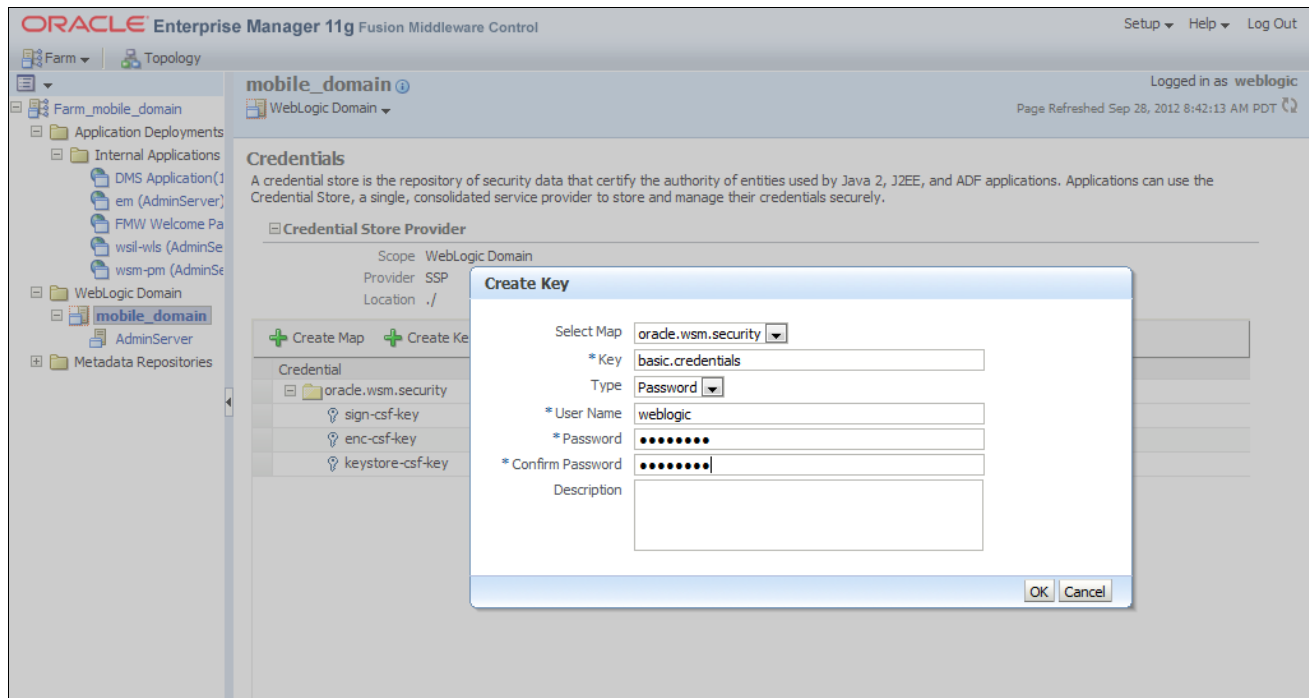


Oracle Enterprise Manager - Credentials page

6. On the Credentials Store page, notice that the oracle.wsm.security credential was created as part of the keystore configuration in the previous step.

7. Click the +Create Key button to create a new key.

The Create Key dialog box appears, as shown in the following example:



Oracle Enterprise Manager - Credentials page: Create Key dialog box

8. In the Create Key dialog box, do the following:
  - In the Key field, enter *basic.credentials*.
  - In the User Name field, enter *weblogic*.
  - In the Password field, enter a password.
  - In the Confirm Password field, enter the password again for confirmation.
  - Click OK.
9. Restart the PeopleSoft Mobile Inventory Management server for your changes to take effect.

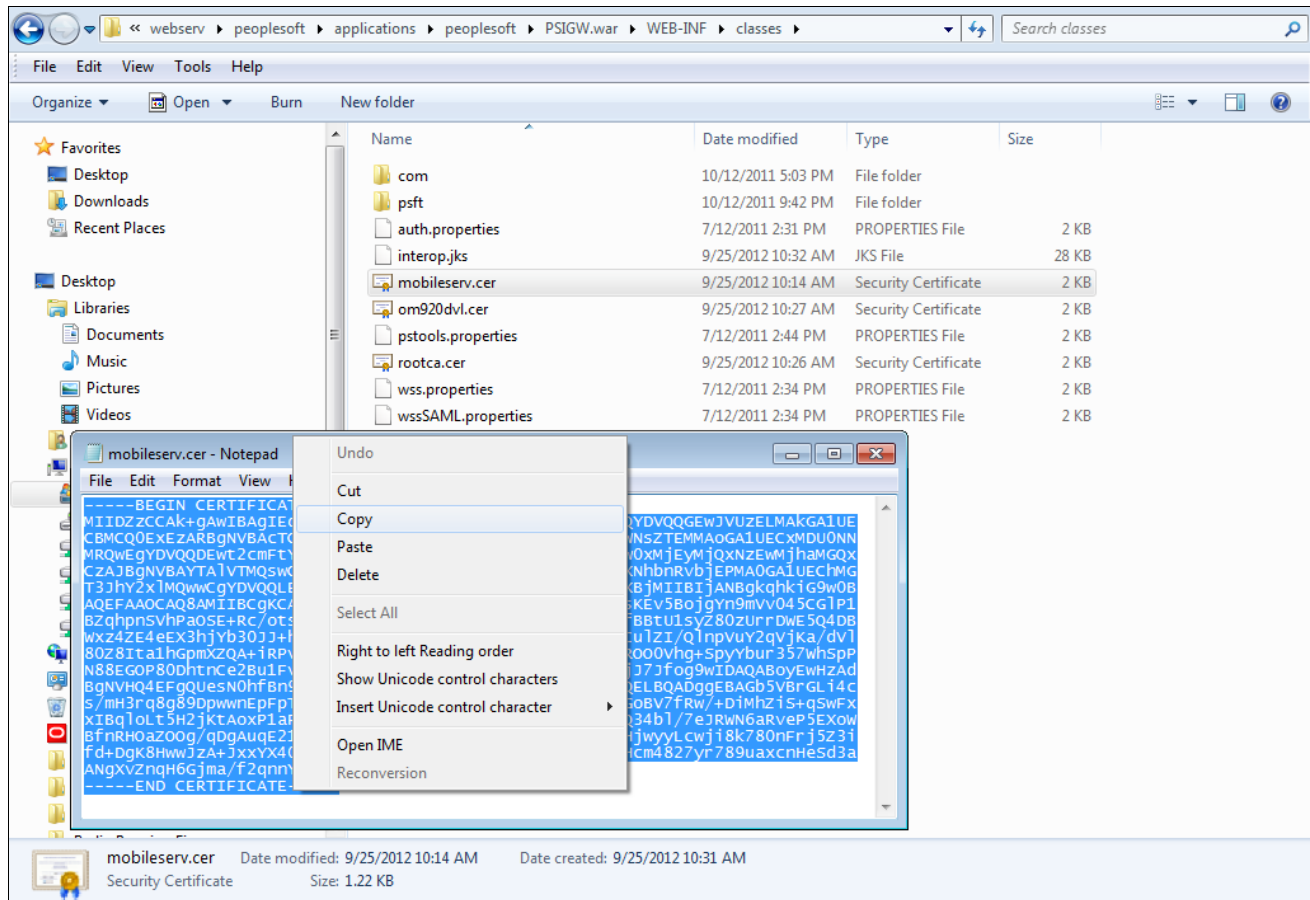
## Task 20-1-5: Adding the SAML Definition Information to the PeopleSoft System

To add the SAML definition information to the PeopleSoft system:

1. Locate the mobileserv.cer file in the following subdirectory:

PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

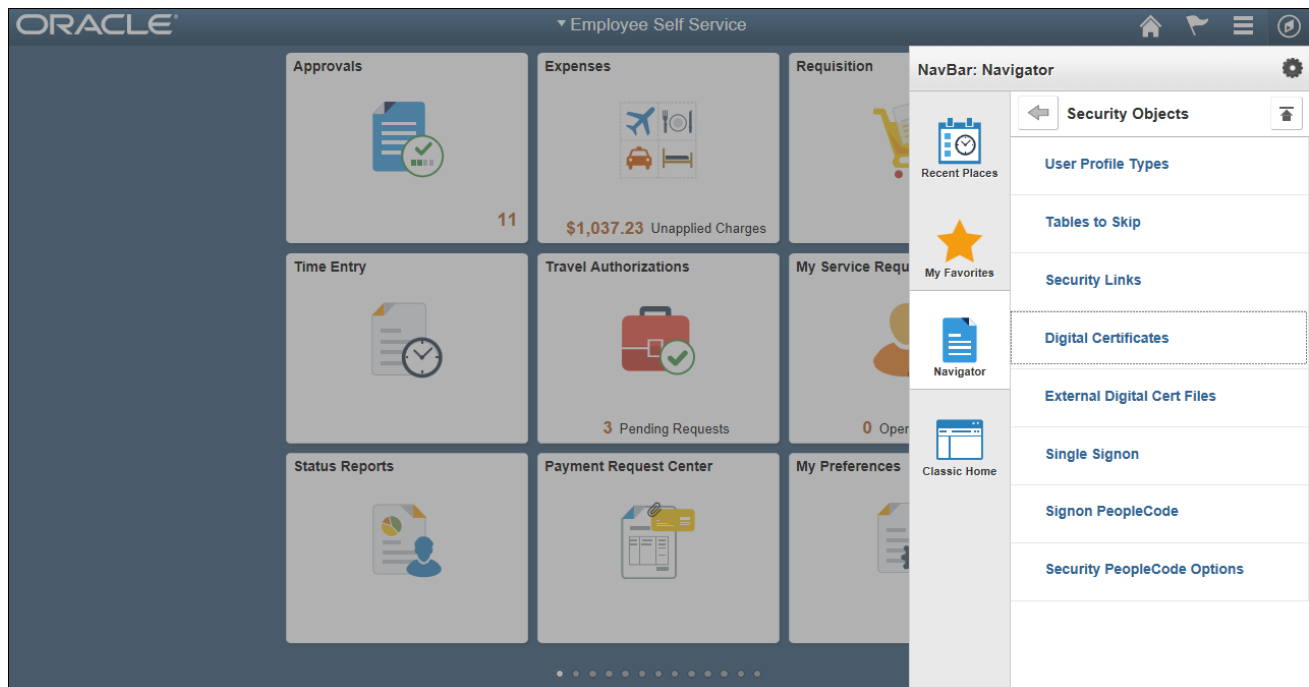
For the next few steps, refer to the following example that shows the navigation to the mobileserv.cer file and the digital certificate in a text editor:



PeopleSoft - Navigation to mobileserv.cer file and digital certificate open and highlighted in text editor



2. Using a text editor, open the mobileserv.cer file.
3. In the text editor, highlight the certificate and copy it to the clipboard.

4. Log on to the PeopleSoft system and access the digital certificate page by selecting PeopleTools, Security, Security Objects, Digital Certificates, as shown in the following navigation example:



PeopleSoft system - Navigation to digital certificate

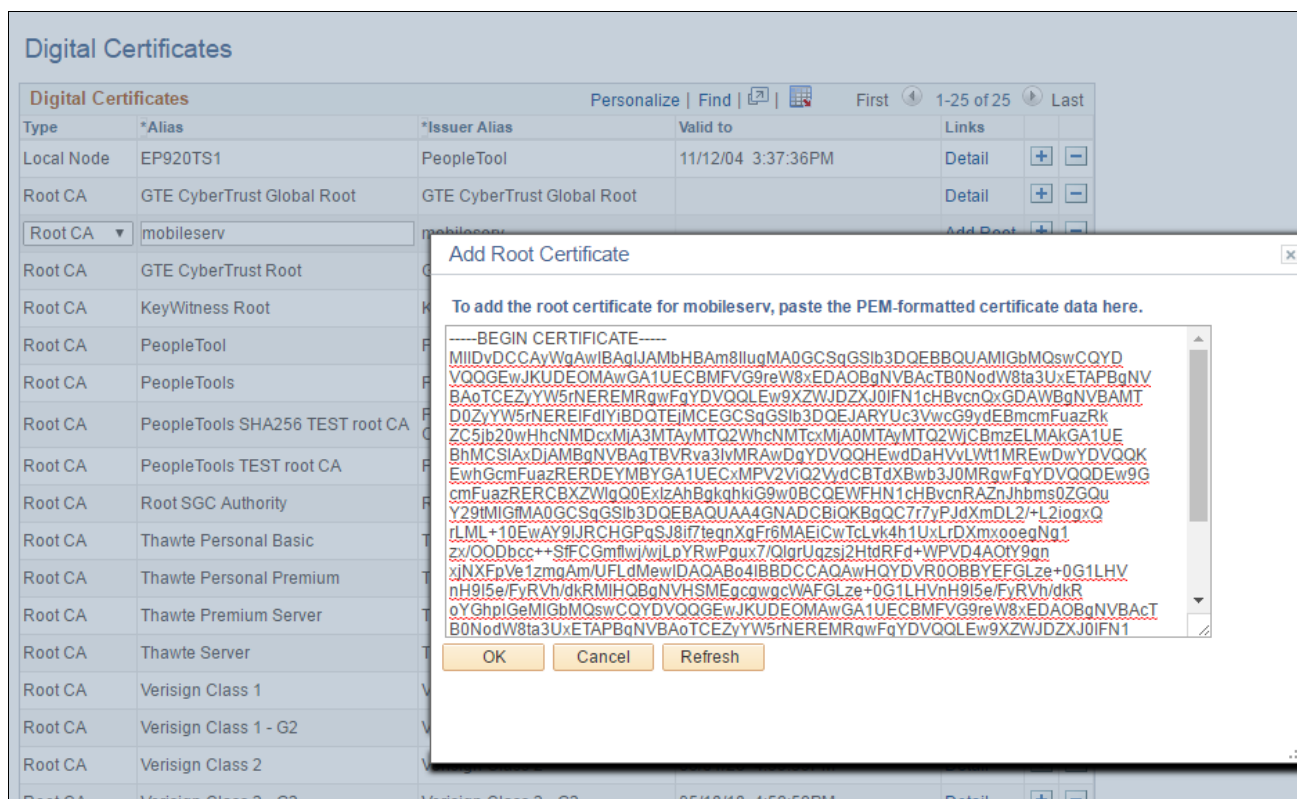
The PeopleSoft Digital Certificates page appears, as shown in the following example:

Digital Certificates					
Digital Certificates			Personalize   Find      	First 	1-24 of 24  Last
Type	*Alias	*Issuer Alias	Valid to	Links	
Local Node	EP920MST	PeopleTool	11/12/04 3:37:36PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	GTE CyberTrust Global Root	GTE CyberTrust Global Root		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA ▼	<input type="text" value="mobileserv"/>	mobileserv		<a href="#">Add Root</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	GTE CyberTrust Root	GTE CyberTrust Root		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	KeyWitness Root	KeyWitness Root		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	PeopleTool	PeopleTool	03/10/05 1:12:35PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	PeopleTools	PeopleTools		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>

PeopleSoft Digital Certificates page

- On the Digital Certificates page, click the Add (+) button to add a new certificate.
- Add the mobileserv digital certificate RootCA.

7. Click the Add Root link to access the Add Root Certificate page, as shown in the following example:







PeopleSoft Digital Certificates - Add Root Certificate page


8. Paste the contents of the clipboard into the dialog area and click OK.



9. Click the Refresh button to save the entry.

The system returns you to the Digital Certificates page, as shown in the following example:

Digital Certificates					
Digital Certificates			Personalize   Find    	First 	1-25 of 25  Last
Type	*Alias	*Issuer Alias	Valid to	Links	
Local Node	EP920TS1	PeopleTool	11/12/04 3:37:36PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	GTE CyberTrust Global Root	GTE CyberTrust Global Root		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	GTE CyberTrust Root	GTE CyberTrust Root		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	KeyWitness Root	KeyWitness Root		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	PeopleTool	PeopleTool	03/10/05 1:12:35PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	PeopleTools	PeopleTools		<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	PeopleTools SHA256 TEST root CA	PeopleTools SHA256 TEST root CA	05/14/35 10:18:37AM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	PeopleTools TEST root CA	PeopleTools TEST root CA	11/20/23 9:36:28AM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Root SGC Authority	Root SGC Authority	12/31/09 11:00:00PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Thawte Personal Basic	Thawte Personal Basic	12/31/20 3:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Thawte Personal Premium	Thawte Personal Premium	12/31/20 3:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Thawte Premium Server	Thawte Premium Server	12/31/20 3:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Thawte Server	Thawte Server	12/31/20 3:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 1	Verisign Class 1	01/07/20 3:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 1 - G2	Verisign Class 1 - G2	05/18/20 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 2	Verisign Class 2	08/01/28 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 2 - G2	Verisign Class 2 - G2	05/18/18 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 3	Verisign Class 3	08/01/28 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 3 - G3	Verisign Class 3 - G3	05/18/18 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 3 Public Primary CA	Verisign Class 3 Public Primary CA	08/01/28 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 4	Verisign Class 4	05/18/18 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign Class 4 - G4	Verisign Class 4 - G4	08/01/28 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	Verisign/RSA Secure Server CA	Verisign/RSA Secure Server CA	01/07/10 4:59:59PM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	eScout Root	eScout Root	11/05/06 6:20:52AM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>
Root CA	mobileserv	mobileserv	12/04/17 2:21:46AM	<a href="#">Detail</a>	<a href="#">+</a> <a href="#">-</a>

 Refresh

PeopleSoft Digital Certificates page

10. On the Digital Certificates page, click the Add (+) button to add a new certificate.

This certificate will be remote.

11. Click the Detail link next to the remote certificate and copy the contents of the clipboard into the text area for the remote certificate.

At this point, the PeopleSoft system identifies the remote certificate mobileserv and defines the RootCA as well.

The example here assumes a self-signed certificate. If the certificate that you are using was issued by a

certificate authority, then the RootCA should point to the appropriate root.

12. Select PeopleTools, Security, SAML Administration Setup, SAML Inbound Setup to access the Security Assertion Markup Language (SAML) Inbound Setup page, as shown in the following example:

**Security Assertion Markup Language [SAML] Inbound Setup.**

\*Certificate Alias:

\*Active Flag:

\*Issuer:

\*SubjectName:

\*QualifierName:

\*Mapping Peoplesoft UserID:

Long Description:

Save Notify Add Update/Display

PeopleSoft Security Assertion Markup Language (SAML) Inbound Setup page

13. On the Security Assertion Markup Language (SAML) Inbound Setup page, add a new entry for the PeopleSoft Mobile Inventory Management server certificate.

The issuer defaults on the PeopleSoft Mobile Inventory Management web server as `www.oracle.com` and did not change.

14. In the SubjectName field, enter a user of the Mobile system.

You must add a new entry for each mobile user.

15. In the Mapping PeopleSoft UserID field, enter the same user of the Mobile system that you entered in the preceding step.

16. To enforce policies (optional), select PeopleTools, Integration Broker, Integration Setup, Services to access the Service Operations - General page, as shown in the following example:

The screenshot displays the 'General' tab of the 'Service Operations' configuration page. Key elements include:

- Service Operation:** MIN\_MENU
- Operation Type:** Synchronous
- \*Operation Description:** Mobile Menu Service Operation
- Operation Comments:** (Empty text area)
- Owner ID:** Mobile Inventory
- Operation Alias:** (Empty text field)
- \*Req Verification:** A dropdown menu is open, showing 'Digitally Signed' as the selected option. Other options include 'None', 'Digital Sign or SSL', 'Encrypt', 'Encrypt and Digitally Sign', 'Encrypt or SSL', 'Encrypt/Digital Sign or SSL', and 'SSL'.
- Service Operation Security:** Includes checkboxes for 'User/Password Required', 'Used with Think Time Met', and 'Conditional Navigation'.
- Default Service Operation Version:**
  - \*Version:** v1
  - Version Description:** Mobile Menu Service Operation
  - Version Comments:** (Empty text area)
  - Runtime Schema Validation:** Includes checkboxes for 'Request Message', 'Response Message', and 'Non-Repudiation'.
  - Routing Status:** A table showing 'Any-to-Local' and 'Local-to-Local' both with a status of 'Exists'.
  - Routing Actions Upon Save:** Includes checkboxes for 'Regenerate Any-to-Local', 'Regenerate Local-to-Local', and 'Transactional'. A warning message states: 'Warning: Regenerating sets all routing field values to their initial state.'
- Message Information:**
  - Type:** Request
  - Message.Version:** MIN\_MNU\_REQ\_CNTR.VERSION\_1
  - Type:** Response
  - Message.Version:** MIN\_MNU\_RSP\_CNTR.VERSION\_1
- Buttons:** 'Add Fault Type', 'Save', 'Return to Service', and 'Add Version'.
- Navigation:** 'General | Handlers | Routings' at the bottom.

### PeopleSoft Service Operations - General page

Enforcing policies on the PeopleSoft side is done at the service operation. This is an optional step that you can perform to better secure your environment.

17. Open the service operation and in the Req Verification field, select the appropriate policy enforcement from the drop-down list box.

For example: *Digitally Signed*

18. Select PeopleTools, Integration Broker, Integration Setup, Nodes to access the WS Security page, as shown in the following example:

PeopleSoft Nodes - WS Security page

19. On the Nodes - WS Security page, select SAML Token from the Authentication Token Type drop-down list box.

This changes the Anonymous Node to identify the SAML Token Authentication Type. This is applied to all web services. Alternatively, you can do this at the routing level for each web service with SAML Authentication Type.

20. Modify the wssSAML.properties file that is in the following subdirectory:  
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

Change the Issuer and subjectNameID.qualifier to www.oracle.com, as shown in the following example:

```
org.apache.ws.security.saml.issuerclass=com.peoplesoft.pt.security.wss.action.PSSAMLIssuerImpl
org.apache.ws.security.saml.issuer=www.oracle.com
org.apache.ws.security.saml.subjectNameID.qualifier=www.oracle.com
org.apache.ws.security.saml.authenticationMethod=password
org.apache.ws.security.saml.confirmationMethod=sendervouches
```

wssSAML.properties file

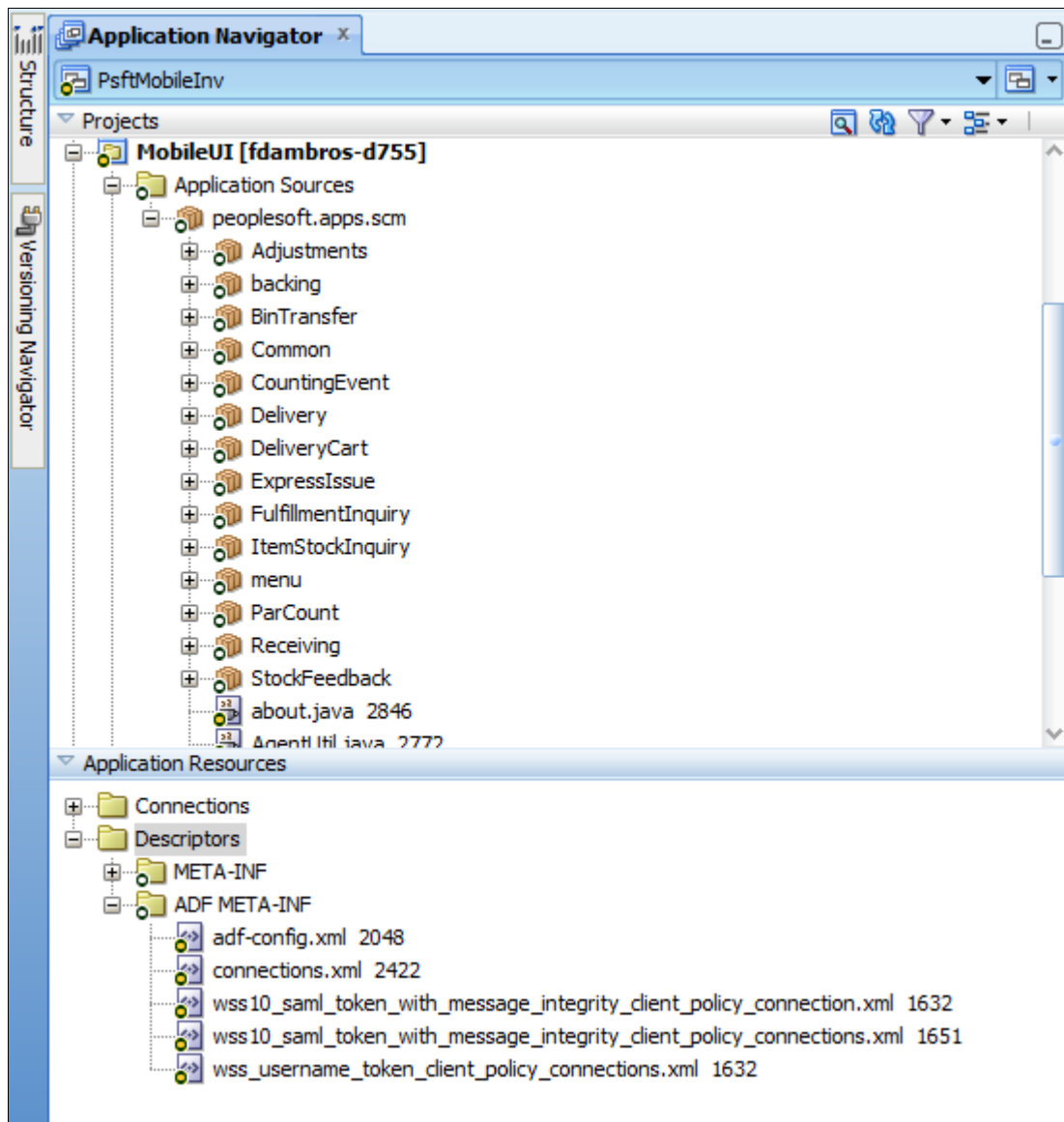
## **Task 20-1-6: Updating the connections.xml to Enforce Security Policies**

You can only perform this step *after* you create a customization environment that you base on the source files that Oracle delivers. If you have not already done so, follow the instructions in the chapter titled "Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management" to create this environment, then return here and proceed with this step.

Oracle delivers the connections.xml file without any security policies. You can update the connections.xml file in the PeopleSoft Mobile Inventory Management application to include client security policies.

To update the connections.xml to enforce security policies:

1. Open the PeopleSoft Mobile Inventory Management application in JDeveloper, and then open the Application Resources section and expand the Descriptors and ADF META-INF sections, as shown in the following example:

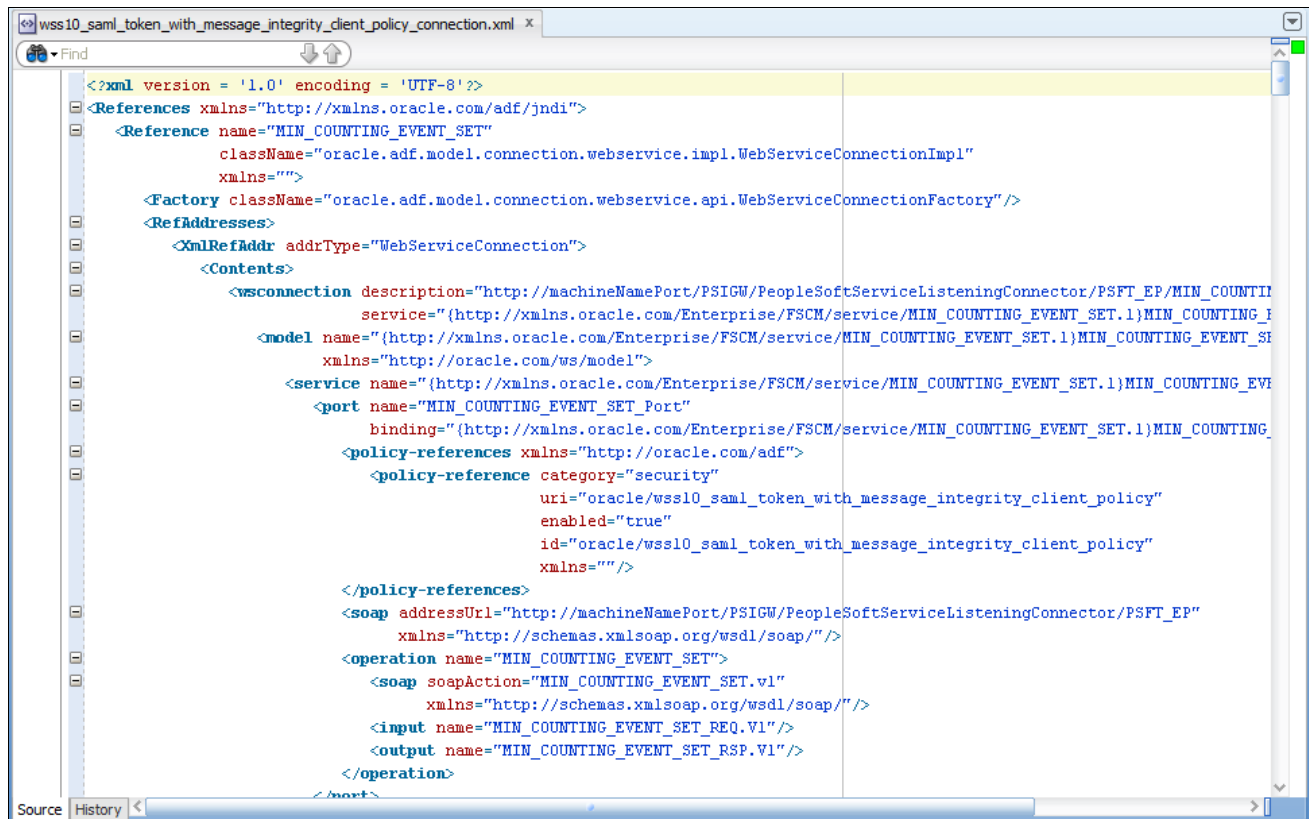


PeopleSoft Mobile Inventory Management - Navigation to locate the connections.xml file

To add WS-Security to the PeopleSoft Mobile Inventory Management application, you must attach a security policy to each service.

- Determine which policy you want to use, then double-click the connections file to open.

The file should open as shown in the following example:



Example of connections.xml file

- Select the entire content of the file using Ctrl-A or Select All from the Edit menu. Then copy the content into the clipboard (Ctrl-C or Copy from the Edit menu).
- Double-click the connections.xml file to open. Then select the entire content of the file (Ctrl-A or Select All from the Edit menu). Paste the content of the clipboard into this file, entirely replacing the content (Ctrl-V or Paste from the Edit menu).
- Save the file.
- After you make these changes, you must redeploy the PeopleSoft Mobile Inventory Management system to the web server that you previously configured in the installation.

**Note.** In the future, when you receive new source file updates, the connections.xml file may be overwritten. Repeat these steps to reinstate the correct security policy.





## Chapter 21

# Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management

This chapter discusses:

- Understanding the Customization Environment for PeopleSoft Mobile Inventory Management
- Prerequisites
- Creating a Customization Environment for PeopleSoft Mobile Inventory Management

## Understanding the Customization Environment for PeopleSoft Mobile Inventory Management

---

The PeopleSoft Mobile Inventory Management application is built using Oracle Application Development Framework (ADF). Oracle ADF uses a customization methodology that you should follow when making customizations to the PeopleSoft Mobile Inventory Management application. Oracle's methodology implements customizations in a way that does not change the source files. Therefore, Oracle can deliver future updates to the original source files without requiring you to reapply the customizations.

## Prerequisites

---

Before you begin, ensure that you meet the following requirements:

- You have access to the source files that Oracle delivers. These source files are in the file PsftMobileInvCustom.zip.

This file is in the directory *PS\_APP\_HOME*\setup\oracle\adf\MobileInventory.

- You have access to the latest version of Oracle JDeveloper 11gR1 (11.1.1.6 or 11.1.1.7)

---

**Note.** Oracle JDeveloper 11gR2 is not yet supported.

---

## Task 21-1: Creating a Customization Environment for PeopleSoft Mobile Inventory Management

---

This section discusses:

- Creating the Customization Environment

- Creating the Customization EAR File

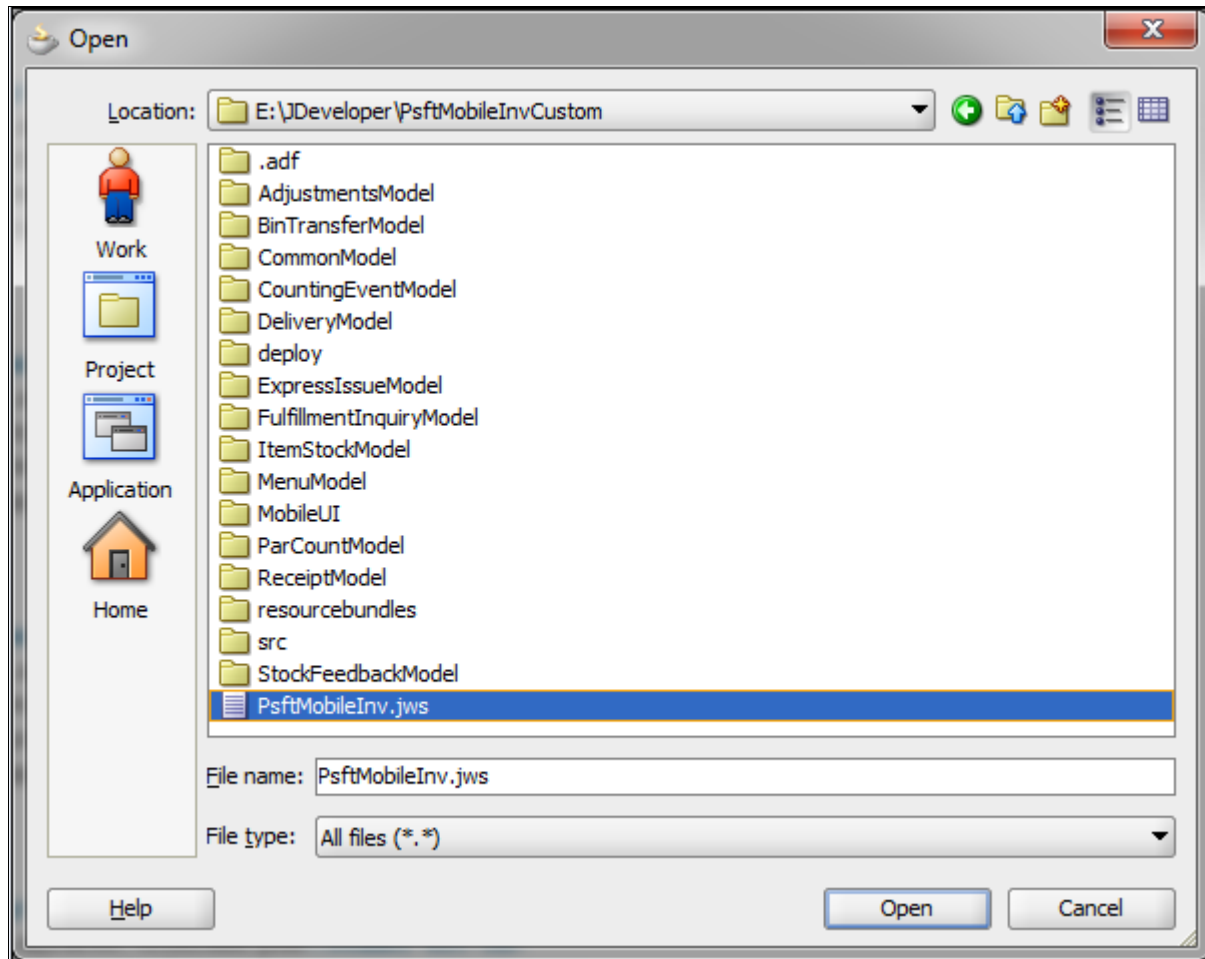
## **Task 21-1-1: Creating the Customization Environment**

To create an environment to customize, you must unzip the source files into a directory of your choice. After you unzip the source files, you can open the application in Oracle JDeveloper using the steps that follow.

To create the customization environment:

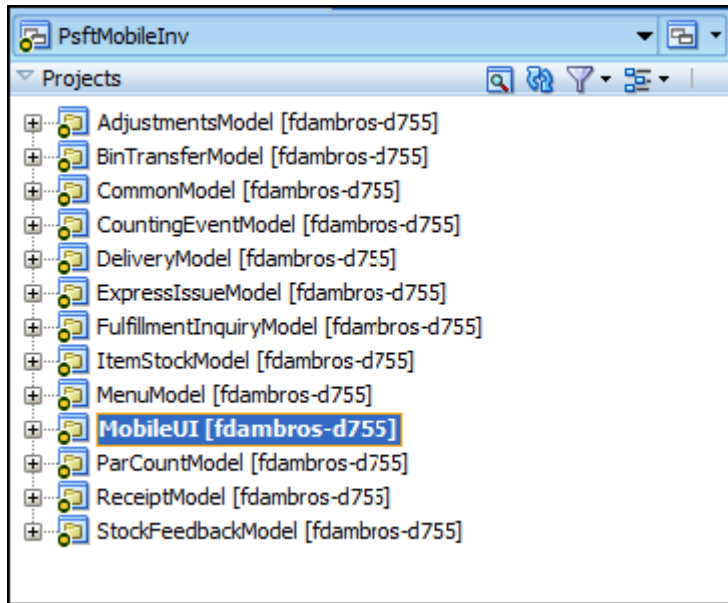
1. In Oracle JDeveloper, select File, Open.

2. In the Open Applications dialog box, look for your source directory, open the PsftMobileInvCustom directory and select the PsftMobileInv.jws file, as shown in the following example:



Open Applications dialog box

The PeopleSoft Mobile Inventory Management application now appears in the Application Navigator, as shown in the following example:



Application Navigator

You can now use the connections.xml file to make customizations.

3. After you create the customization environment, the process changes slightly for subsequent source files that Oracle delivers. You still unzip the application files to the same directory; however, one of the files requires special treatment.

Oracle delivers the connections.xml file without any security association. In an earlier step in the chapter titled "Installing PeopleSoft 9.2 Mobile Inventory Management" of this installation guide, you are instructed to replace the generic connections file with one that is specific to your security setup. When you unzip the source files after the initial setup, the specific connections file that you specified in that step is overwritten by the generic file. Therefore, you need to replace the generic file with the specific security file that you are using.

The detailed instructions for this procedure are in the chapter titled "Configuring WS-Security for PeopleSoft Mobile Inventory Management" of this installation guide.

See the section Updating the connections.xml to Enforce Security Policies in the chapter "Configuring WS-Security for PeopleSoft Mobile Inventory Management."

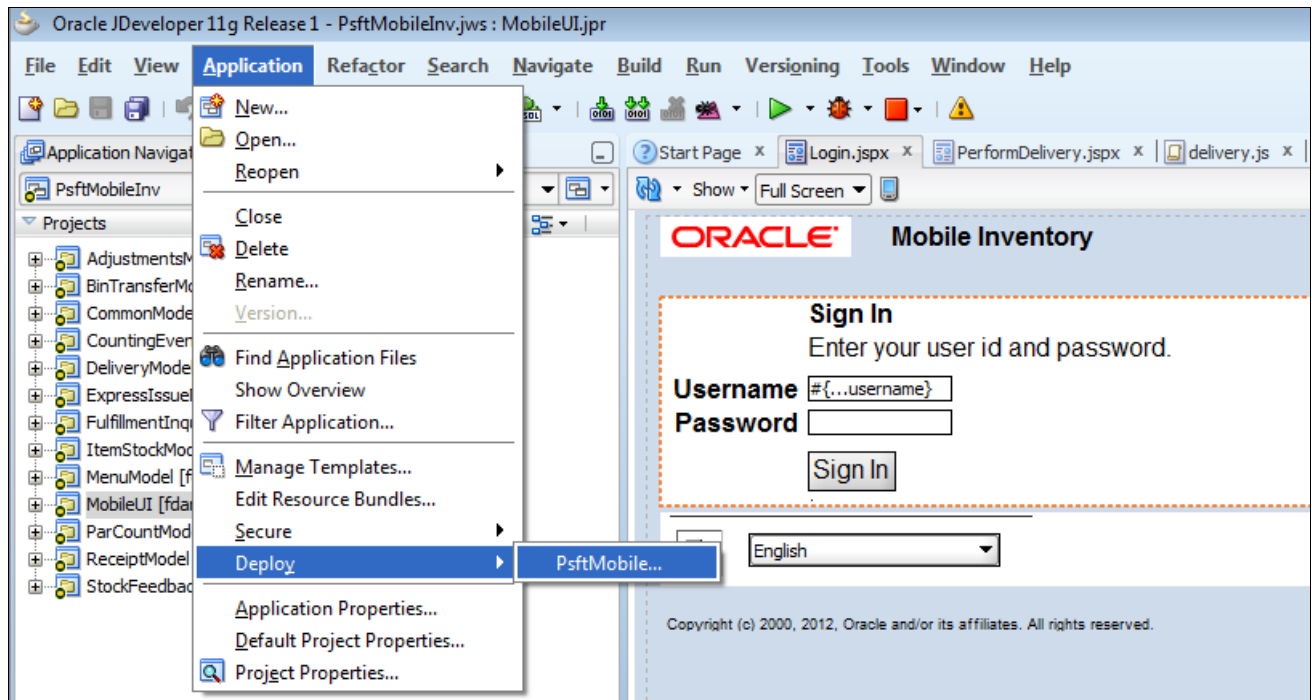
## Task 21-1-2: Creating the Customization EAR File

After you make the changes in the previous step, you must redeploy the customizations for the changes to take effect. To deploy the customized version, you must create an EAR file of the custom application.

To create an EAR file of the custom application for deploying to the application server:

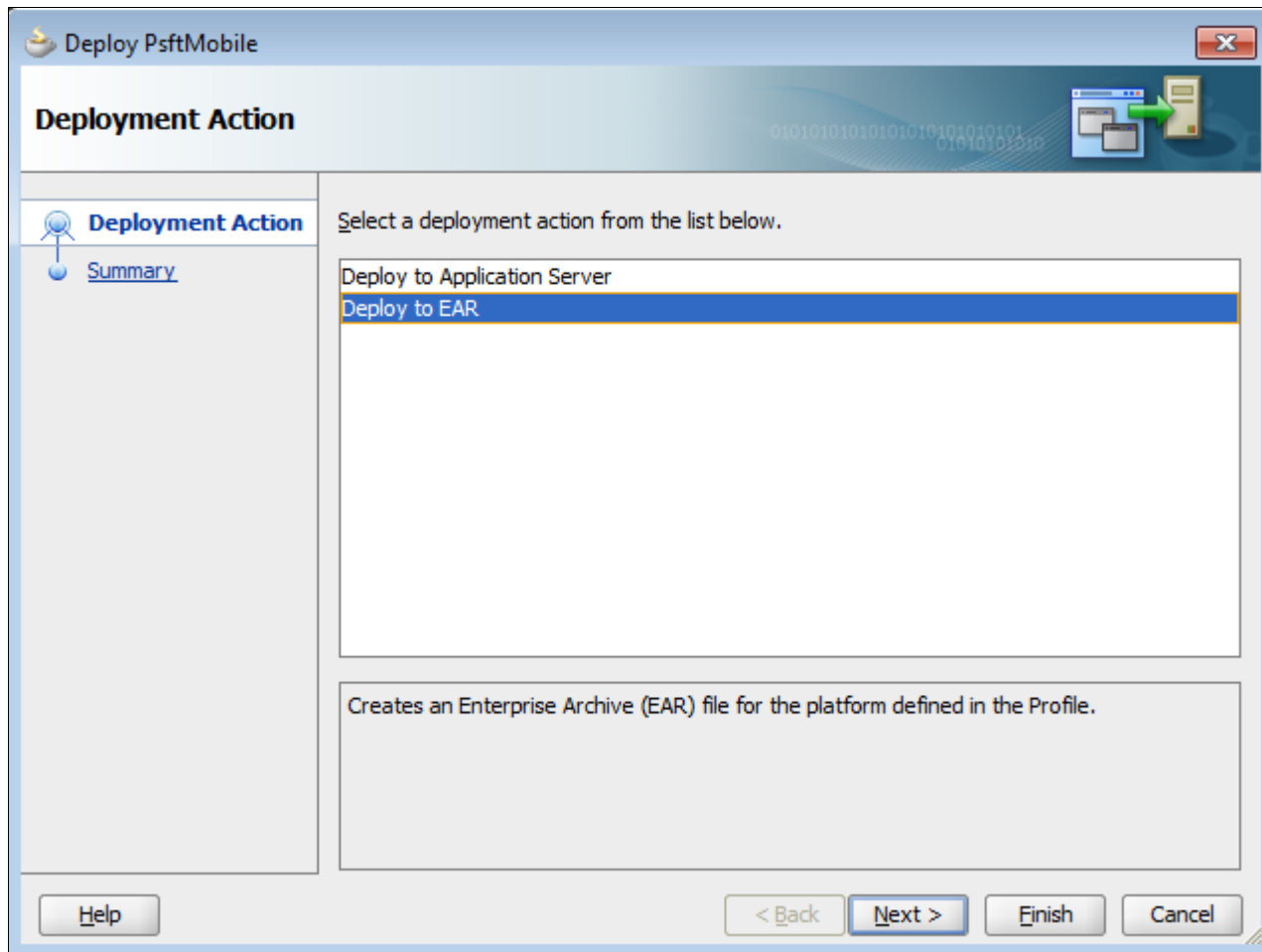
1. Start with the customized application open in Oracle JDeveloper.

2. From the Oracle JDeveloper menu, select Application, Deploy, as shown in the following example:



Oracle JDeveloper menu

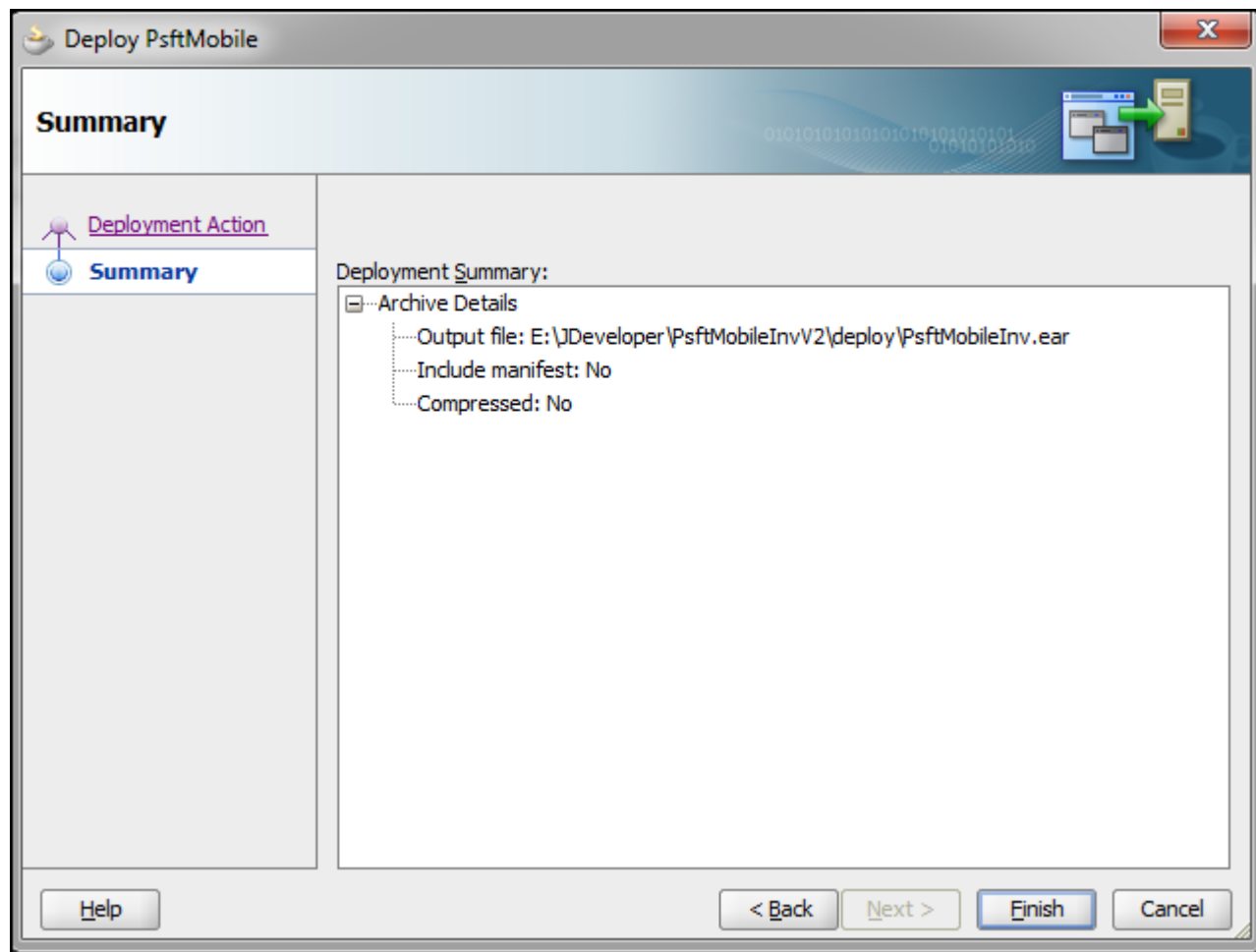
The Deployment Action page opens, as shown in the following example:



Oracle JDeveloper - Deployment Action page

3. On the Deployment Action page, select Deploy to EAR and then click Next.

The Summary page appears, as shown in the following example:



Oracle JDeveloper - Summary page

On the Summary page, the final details of the deployment file are given and include the path and file name where the system creates the EAR file.

4. Click Finish to create the EAR file.

You can now deploy and configure the file on the application server.





## Chapter 22

# Configuring eMail URLs in PeopleSoft SCM Applications

This chapter discusses:

- Configuring eMail URLs
- Setting Up Pagelets
- Granting Access to Navigation Pages

## Task 22-1: Configuring eMail URLs

---

This section discusses:

- Understanding eMail Configuration
- Configuring eMail URLs for Item Loader Exceptions
- Configuring eMail URLs for Supplier Facing Applications
- Configuring eMail URLs for PeopleSoft eBill Payment

### Understanding eMail Configuration

Some products in PeopleSoft Supply Chain Management (SCM) can send out email notifications containing web addresses (URLs) that enable your employees and external parties to link back to your website. For emails to contain the correct embedded URLs to PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft eProcurement pages, you must edit the URL as discussed in this section.

### Task 22-1-1: Configuring eMail URLs for Item Loader Exceptions

You must modify `SCM_SERVLET_INT` to point to an internal server that you use to access the PeopleSoft SCM database. This URL creates standard PeopleSoft Internet Architecture links for internal users, such as employees, to access pertinent components and pages.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier `SCM_SERVLET_INT`.

- On the URL Maintenance page, in the URL field, edit the URL to point to an internal server to access the PeopleSoft Supply Chain Management database, as shown in the following example:

**URL Maintenance**

URL Identifier: SCM\_SERVLET\_INT

\*Description: Servlet used by internal users

\*URLID: http://

Comments: Internal link to Supply Chain database  
Example: http://<machine name>/psp/<website name>/EMPLOYEE/ERP  
EMPLOYEE is the portal registry

URL Properties

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

URL Maintenance page for SCM\_SERVLET\_INT

- Click Save.

## Task 22-1-2: Configuring eMail URLs for Supplier Facing Applications

The information in this section applies to PeopleSoft eSupplier Connection, PeopleSoft Collaborative Supply Management, PeopleSoft Supplier Contract Management, PeopleSoft Strategic Sourcing, PeopleSoft Services Procurement, and PeopleSoft Supplier Registration.

You must modify EMP\_SERVLET, SUP\_SERVLET, and SUP\_OB\_INVITE to point to the correct servers that you plan to use to access the PeopleSoft SCM database. These URLs are a requirement when you are not using an Enterprise Portal, as there is no other way to identify the different web servers used for the Employee or Supplier side.

To set up these URLs:

- Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
- On the URL search page, search for the URL identifier *SUP\_SERVLET*.

3. On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

That is, the server that the suppliers use to sign in to the SUPPLIER registry, as shown in the following example:

**URL Maintenance**

URL Identifier: SUP\_SERVLET

\*Description: Supplier portal servlet

\*URLID: http://webserver/psp/supportal/

Comments: Link to Supplier Portal  
Example: http://localhost/psp/supplierportaldomain/

**URL Properties**

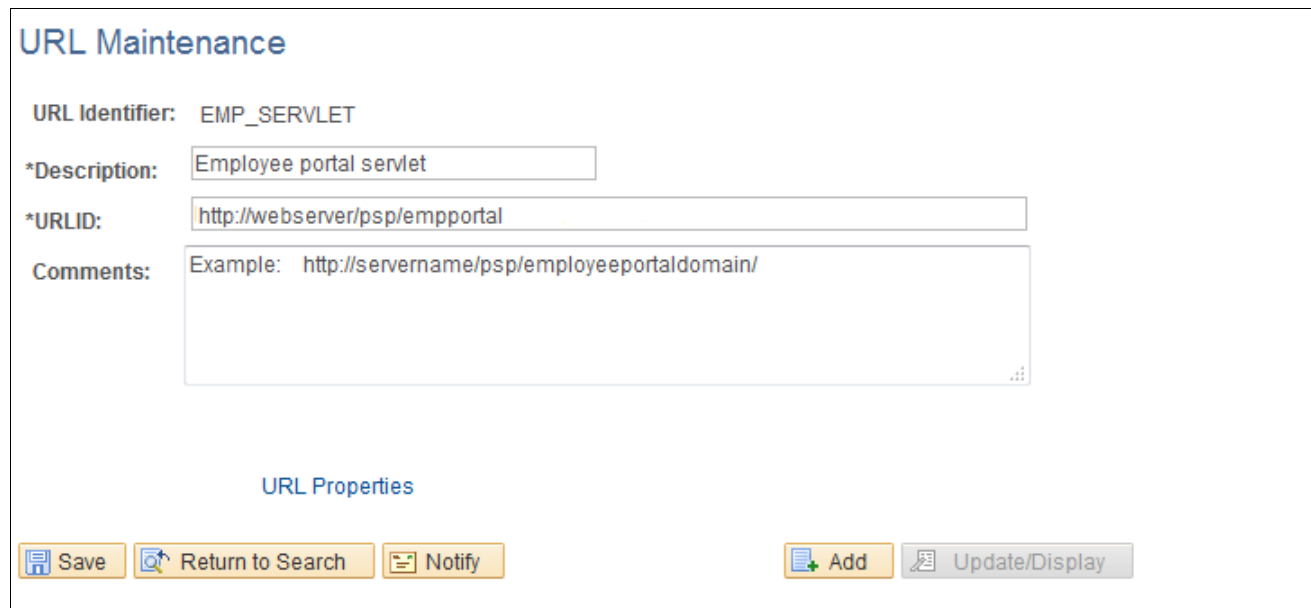
Save Return to Search Notify Add Update/Display

URL Maintenance page for SUP\_SERVLET

4. Click Save.
5. Click Return to Search.
6. On the URL search page, search for the URL identifier *EMP\_SERVLET*.

7. On the URL Maintenance page, in the URL field, edit the URL to point to an INTERNAL server to access the PeopleSoft Supply Chain Management database.

That is, the server that the employees use to sign in to the EMPLOYEE registry, as shown in the following example:



The screenshot shows the 'URL Maintenance' page for the identifier 'EMP\_SERVLET'. It contains the following fields and values:

- URL Identifier:** EMP\_SERVLET
- \*Description:** Employee portal servlet
- \*URLID:** http://webserver/psp/empportal
- Comments:** Example: http://servername/psp/employeeportaldomain/

Below the fields is a section titled 'URL Properties'. At the bottom of the page are five buttons: 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

URL Maintenance page for EMP\_SERVLET

8. Click Save.
9. Click Return to Search.
10. On the URL search page, search for the URL identifier *SUP\_OB\_INVITE*.

11. On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

That is, the server that the potential suppliers use to sign in to the SUPPLIER registry, as shown in the following example:

**URL Maintenance**

URL Identifier: SUP\_OB\_INVITE

\*Description:

\*URLID:

Comments:

**URL Properties**

URL Maintenance page for SUP\_OB\_INVITE

12. Click Save.

### Task 22-1-3: Configuring eMail URLs for PeopleSoft eBill Payment

You must modify the EB\_SERVLET to point to the correct server that you plan to use to access the PeopleSoft SCM database for the CUSTOMER registry. This is necessary to enable PeopleSoft Billing to generate the correct link to the PeopleSoft eBill Payment components.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *EB\_SERVLET*.

- On the URL Maintenance page, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

That is, the server that your customers use to sign in to the CUSTOMER registry, as shown in the following example:

**URL Maintenance**

URL Identifier: EMP\_SERVLET

\*Description: Employee portal servlet

\*URLID: http://<machine-name>/psp/<web-server domain-name>/

Comments: Example: http://servername/psp/employeeportaldomain/

URL Properties

Save Return to Search Notify Add Update/Display

URL Maintenance page for EB\_SERVLET

- Click Save.

## Task 22-2: Setting Up Pagelets

This section discusses:

- Accessing Pagelets
- Enabling Pagelet Creation and Access with Portal Utilities

### Task 22-2-1: Accessing Pagelets

You can access pagelets within the PeopleSoft 9.2 Supply Chain Management application databases. Use these instructions to apply scripts to your database to allow access to the pagelet configuration homepage.

**Note.** You must complete the following steps for both the System (SYS) and Demo (DMO) databases, unless otherwise indicated.

To add, remove, or change the layout of the homepage, you must grant the homepage personalization security access to all non-guest users. To update the homepage personalization permission list, use PeopleSoft Data Mover to run the PORTAL\_HP\_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL\_ADD\_ROLE.DMS script. You can find both scripts in PS\_APP\_HOME\scripts.

---

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

---

## Task 22-2-2: Enabling Pagelet Creation and Access with Portal Utilities

Perform this task only if you are licensed for PeopleSoft Supply Chain Portal Pack or PeopleSoft Portal Solutions.

Use PeopleSoft Data Mover to run the EOPP\_PORTAL\_PACK.DMS script in *PS\_APP\_HOME*\scripts. This script enables the creation and viewing of pagelets using the Enterprise Components Portal Utilities.

## Task 22-3: Granting Access to Navigation Pages

---

To access the navigation pages, you must grant security to the Navigation Page IScripts to all users. To add the EOPP\_USER role to all users, use PeopleSoft Data Mover to run the EOPP\_ADD\_ROLE.DMS script in *PS\_APP\_HOME*\scripts.

---

**Note.** When you create a new user ID, you should add the EOPP\_USER role to the new user ID.

---





## Chapter 23

# Setting Up PeopleSoft Supplier Relationship Management Applications

This chapter discusses:

- Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup
- Granting Security in PeopleSoft Fluid Requisition
- Setting Up the PeopleSoft Search Framework Search Engine in Fluid Requisition

## Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup

---

This section applies to PeopleSoft Supplier Contract Management. To use PeopleSoft Supplier Contract Management, you must set up a database or FTP file attachment server as documented in the task Upgrading File Attachment, and have Microsoft Word 2007 or higher installed.

Review the following setup tasks:

- Setup of a Microsoft Word template.
- Optional setup for individual clients to allow certain users to look up clauses and bind variables in the PeopleSoft database from within Microsoft Word using Microsoft Research task pane functionality.
- Optional setup to allow users to perform server side compares of Microsoft Word documents, and optional dispatch of contracts to suppliers in a .doc or .pdf format (versus the default .xml format).
- Optional installation setup for PeopleSoft Search Framework.
- Optional installation setup for workflow.
- Optional installation setup for contract syndication
- Optional setup that enables documents to use digital signatures like Adobe or Microsoft Word 2007 or higher versions.

See the product documentation for PeopleSoft FSCM: Supplier Contract Management for more information about the setup tasks.

## **Task 23-1: Granting Security in PeopleSoft Fluid Requisition**

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### **Understanding PeopleSoft Fluid Requisition**

The PeopleSoft Fluid Requisition is based on Fluid Architecture and combined with a Component Interface. Fluid Architecture builds the front end display and the Component Interface handles the bulk of the business logic at the back end.

Use the Permission List EPPV1000 from PeopleSoft Pure Internet Architecture to grant security to PeopleSoft Fluid Requisition 9.2 objects.

Permission lists are tied to roles. Users are then tied to those roles so by granting permission to an object in a permission list, any user assigned to a role that is tied to that permission list is granted permission.

### **Task 23-1-1: Granting Access to Component Interfaces**

To grant permission to permission lists, navigate to the PeopleTools Permission Lists component:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. Select the Component Interfaces tab.

Fluid Requisition requires the use of Component Interface PV\_PROCURE\_REQ\_V3\_CI.

4. Select Edit for Component Interface PV\_PROCURE\_REQ\_V3\_CI in the Component Interfaces tab as shown in the following example:

General | Pages | PeopleTools | Process | Sign-on Times | **Component Interfaces** | Web Libraries |

Permission List EPPV1000

Description ePro Requisitions

Component Interfaces		Personalize	Find			First	1-6 of 6	Last
Name	Edit							
PV_PROCURE_REQ_V2_CI	<a href="#">Edit</a>							
PV_PROCURE_REQ_V3_CI	<a href="#">Edit</a>							
PV_REQ_CANCEL	<a href="#">Edit</a>							
PV_WF_REQ_APPR_CI	<a href="#">Edit</a>							
USER_PROFILE	<a href="#">Edit</a>							
WORKLISTENTRY	<a href="#">Edit</a>							

Save
 Return to Search
 Add
 Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | Web Libraries | Web Services | Personalizations |

Permission Lists page: Component Interfaces tab for PV\_PROCURE\_REQ\_V3\_CI

5. Grant Full access for all the methods in the list as shown in the following example:

Component Interface Permissions

PV\_PROCURE\_REQ\_V3\_CI

Component Interface Permission Personalize Find 1-16 of 16 First Last

Method	*Method Access
AddItem	Full Access
Cancel	Full Access
ChangeShipTo	Full Access
Create	Full Access
Find	Full Access
Get	Full Access
GetAuthorizedCatalogs	Full Access
GetDirectConnectList	Full Access
GetRestrictInventoryRoleView	Full Access
GetSubstituteItemRoleView	Full Access
GetViewAllVendorsRoleView	Full Access
Save	Full Access
SaveRequisition	Full Access
SaveRequisitionforLater	Full Access
GetAllComments	Full Access
DeleteBufferRow	Full Access

Full Access (All)

No Access (All)

OK Cancel

Component Interface Permissions page for PV\_PROCURE\_REQ\_V3\_CI

6. Click OK.

## Task 23-1-2: Granting Access to Web Libraries (IScript Functions)

Fluid Requisition also requires the use of various IScript functions which are present inside Web Libraries. IScript functions are PeopleSoft records that start with prefix IScript\_.

To grant permission to Web Libraries:

1. Navigate to PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. On the Permission Lists page, select the Web Libraries tab.

4. Select the Edit link for the WEBLIB\_PV record as shown in the following example:

Permission List  
 Description ePro Requisitions

**Web Libraries**   Personalize | Find | |   First 1-8 of 8 Last

Web Library Name	Edit		
WEBLIB_ART	<u>Edit</u>		
WEBLIB_EOAW	Edit		
WEBLIB_PTAF	Edit		
WEBLIB_PV	Edit		
WEBLIB_PVMOBILE	Edit		
WEBLIB_PV_DC	Edit		
WEBLIB_PV_EMAIL	Edit		
WEBLIB_PV_VVML	Edit		

Save   Return to Search   Add   Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | Web Libraries | Web Services | Personalization

Permission Lists page: Web Libraries tab for WEBLIB\_PV

**Note.** Once one of these records is added to the Web Libraries tab of the Permission List component, all functions that contain the prefix in any field is automatically displayed in the Web Library permissions secondary page.

5. Grant full access to all the IScript functions as shown in the following example:

WebLib Permissions

WEBLIB\_PV

**Web Library Permission** Personalize | Find | 1-39 of 39 First Last

Full Access (All) No Access (All)

Function	*Access Permissions	View Content References for this Script
ISCRIP1.FieldFormula.IScript_PVShopCart_Template	Full Access ▼	View
ISCRIP1.FieldFormula.IScript_WFDesignerDeleteRow	Full Access ▼	View
ISCRIP1.FieldFormula.IScript_WFHomePageRedirect	Full Access ▼	View
PV_CATALOG_SELECT.FieldFormula.IScript_SelectCatalogs	Full Access ▼	View
PV_CONTEXT_LINKS.FieldFormula.IScript_TransactionLinks	Full Access ▼	View
PV_FRAMEBREAKER.FieldFormula.IScript_Frame_Breaker	Full Access ▼	View
PV_INFO_POPUP.FieldFormula.IScript_ChunkChangeConfirm	Full Access ▼	View
PV_INFO_POPUP.FieldFormula.IScript_ChunkChangeFinish	Full Access ▼	View
PV_INFO_POPUP.FieldFormula.IScript_CloseWindow	Full Access ▼	View
PV_INFO_POPUP.FieldFormula.IScript_PurchasePriceBreaks	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_Fullsite	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCart	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCartJ	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCartJson	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_Order	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_PVMsrch	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_Submit	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartrefresh	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartupdate	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartvalidate	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_eprohome	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_myorders	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_setoption	Full Access ▼	View
PV_ITEM_SEARCH.FieldFormula.IScript_shipaddress	Full Access ▼	View
PV_ITM_IMAGE_VIEW.FieldFormula.IScript_ViewWtmImageFullSize	Full Access ▼	View
PV_ITM_IMAGE_VIEW.FieldFormula.IScript_ViewWtmImageFullSize2	Full Access ▼	View
PV_PRINT_REQ.FieldFormula.IScript_PVPrintHeader	Full Access ▼	View
PV_PRINT_REQ.FieldFormula.IScript_PVPrintReq	Full Access ▼	View
PV_RULE_STATUS.FieldFormula.IScript_Adhoc_Approver_Insert	Full Access ▼	View
PV_RULE_STATUS.FieldFormula.IScript_Delete_Adhoc_Approver	Full Access ▼	View
PV_RULE_STATUS.FieldFormula.IScript_Insert_Adhoc_Approver	Full Access ▼	View

WebLib Permissions page for WEBLIB\_PV

6. Repeat steps 1–5 for Web Library WEBLIB\_PVMOBILE.

Grant Full Access to the following:

- PV\_ISCRIP1\_LIB.FieldFormula.IScript\_AjaxText
- PV\_ISCRIP1\_LIB.FieldFormula.IScript\_ChangeRequestInfo

7. Repeat steps 1–5 for Web Library WEBLIB\_PV\_DC.

Grant Full Access to the following:

- PV\_ISCRIP1\_LIB.FieldFormula.IScript\_DCCatcher

- PV\_ISCRIPT\_LIB.FieldFormula.IScript\_DirectConnect

### Task 23-1-3: Granting Access to Users

The Fluid Requisition component and its Permission List EPPV1000 has already been assigned to roles ePro Requester and ePro Novice Requester in order to access the Fluid Requisition application.

You can also assign the Permission List EPPV1000 to any roles that would grant Fluid Requisition permissions to any user belonging to the assigned roles. The following example shows that the Permission List EPPV1000 is assigned to the role ePro Requester:

General | **Permission Lists** | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit

Role Name: ePro Requester  
Description: eProcurement Requester

Permission Lists		Personalize	Find	View All	First	1 of 1	Last
*Permission List	Description	View Definition					
EPPV1000	ePro Requisitions	View Definition					

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

General | Permission Lists | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit

Roles page: Permission Lists tab for Role ePro Requester

You can navigate to the User Profiles page to see the various roles to which the user belongs, as shown in the following example:

The screenshot displays the 'User Profiles' page with the 'Roles' tab selected. The user ID is 'VP1' and the description is 'Kenneth Schumacher'. The 'Dynamic Role Rule' section on the left includes buttons for 'Execute on Server', 'Test Rule(s)', 'Refresh', 'Execute Rule(s)', 'Process Monitor', and 'Service Monitor'. The main table, titled 'User Roles', lists the roles assigned to the user. The table has columns for 'Role Name', 'Description', 'Dynamic', and 'View Definition'. The roles listed are UPG\_ALLPNLS, UPG\_APPSRVR, VICE PRESIDENT, VMI Manager, XMLP Power User, XMLP Report Developer, ePro Admin, ePro Buyer, and ePro Requester. Each role has a 'Route Control' checkbox and a 'View Definition' link. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'.

Role Name	Description	Dynamic	View Definition
UPG_ALLPNLS		<input type="checkbox"/>	Route Control
UPG_APPSRVR	Can start application server	<input type="checkbox"/>	Route Control
VICE PRESIDENT	Vice President	<input type="checkbox"/>	Route Control
VMI Manager	VMI Manager	<input type="checkbox"/>	Route Control
XMLP Power User	BIP Power User	<input type="checkbox"/>	Route Control
XMLP Report Developer	BIP Report Developer	<input type="checkbox"/>	Route Control
ePro Admin	ePro Administrator	<input type="checkbox"/>	Route Control
ePro Buyer	ePro Buyer	<input type="checkbox"/>	Route Control
ePro Requester	eProcurement Requester	<input type="checkbox"/>	Route Control

User Profiles page: Roles tab

## Task 23-1-4: Granting Access to Menu and Components

To grant permission to permission list, navigate to the PeopleTools Permission Lists component:

1. Select PeopleTools, Security, Permission & Roles, Permission Lists.
2. Search for and select the Permission List *EPPV1000*.
3. Select the Pages tab Fluid Requisition requires the use of Menu PV\_MOB\_MENU.

























4. Select Edit Components hyperlink for Menu PV\_MOB\_MENU on Pages tab as shown in the following example:

General **Pages** PeopleTools Process Sign-on Times Component Interfaces

Permission List **EPPV1000**

Description ePro Requisitions

[Mobile Page Permissions](#)

Menus		Personalize   Find   View All    	First	1-10 of 10	Last
Menu Name	Menu Label	Edit Components			
EOAW_APPROVAL_WORKFLOW	Eoaw Approval Workflow	Edit Components			
EOEN_MAIN_MENU	Eoen Main Menu	Edit Components			
MANAGE_COMMITMENT_CONTROL	Manage Commitment Control	Edit Components			
MANAGE_PURCHASE_ORDERS	Manage Purchase Orders	Edit Components			
PTAF_APPROVAL_WORKFLOW	Sac Approval Workflow	Edit Components			
PV_MAINPAGE_MENU	eProcurement Home	Edit Components			
PV_MAIN_MENU	Main Menu	Edit Components			
PV_MOB_MENU	eProcurement Mobile Menu	Edit Components			
PV_WORKLIST	Worklist	Edit Components			
WORKFLOW_ADMINISTRATOR	Workflow Administrator	Edit Components			

Permission Lists page: Pages tab for PV\_MOB\_MENU Menu

5. Select Edit Pages hyperlink for Component Name PV\_MOB\_855\_CMP as shown in the following example:

**Component Permissions**

eProcurement Mobile Menu

Components					Personalize	Find	First	1-5 of 5	Last	Select All
Authorized?	Component Name	Item Label	Edit Pages	View Content References for this Component						
<input checked="" type="checkbox"/>	PV_MOB_855_CMP	Mobile Requisition 855	<a href="#">Edit Pages</a>	<a href="#">View</a>						
<input checked="" type="checkbox"/>	PV_MOB_855_MNG	My Requisitions	<a href="#">Edit Pages</a>	<a href="#">View</a>						
<input type="checkbox"/>	PV_MOB_CMP	Mobile Requisitions	<a href="#">Edit Pages</a>	<a href="#">View</a>						
<input checked="" type="checkbox"/>	PV_MOB_PREF_FL	My Preferences	<a href="#">Edit Pages</a>	<a href="#">View</a>						
<input checked="" type="checkbox"/>	PV_RECV_PO_FL	ePro Receiving	<a href="#">Edit Pages</a>	<a href="#">View</a>						

OK Cancel

Deselect All

Component Permissions: Component Name PV\_MOB\_855\_CMP

6. Select All Actions as Authorized for the Pages in the List as shown in the following example:

Page Permissions

PV\_MOB\_MENU / Use / Mobile Requisition 855

Pages

Personalize | Find |

First 1-16 of 16 Last

Panel Item Name	Authorized?	Display Only
Side 1 page - Requisitions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Search Select	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cart	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Search Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Checkout	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Search Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pv Mob 855 Puchout	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Save Confirmation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Search Footer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approvals	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Requisition	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Browse Catalogs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Recently Ordered Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Special Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Actions

☐ Add  
☒ Update/Display  
☐ Update/Display All  
☐ Correction

Select All

Deselect All

Page Permission: Authorized

7. Click OK.

8. Repeat Steps 5-7 to select Edit Pages hyperlink for Component Name PV\_MOB\_855\_MNG and Select All Actions.

**Page Permissions**

PV\_MOB\_MENU / Use / My Requisitions

Panel Item Name	Authorized?	Display Only
My Requisitions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pv Myord Schd Scf2	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Actions**

☐ Add

☒ Update/Display

☐ Update/Display All

☒ Correction

Select All

Deselect All

OK Cancel



Page Permissions: Component Name PV\_MOB\_855\_MNG



9. Repeat Steps 5-7 to select Edit Pages hyperlink for Component Name PV\_MOB\_PREF\_FL and Select All Actions.

Page Permissions

PV\_MOB\_MENU / Use / My Preferences

Pages

Personalize | Find |  | 

First  1-2 of 2  Last

Panel Item Name	Authorized?	Display Only
My Preferences	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Footer	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Actions

☐ Add

☒ Update/Display

☐ Update/Display All

☐ Correction

Select All

Deselect All

OK

Cancel

Page Permissions: Component Name PV\_MOB\_PREF\_FL

10. Repeat Steps 5-7 to select Edit Pages hyperlink for Component Name PV\_RECV\_PO\_FL and Select All Actions.

**Page Permissions**

PV\_MOB\_MENU / Use / ePro Receiving

Pages	Personalize	Find	First	1-13 of 13	Last	Actions
Panel Item Name	Authorized?	Display Only				
Search	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Update/Display <input type="checkbox"/> Update/Display All <input type="checkbox"/> Correction  Select All Deselect All			
Receive Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Receive Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Receive Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Reject Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Receive Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Recv Header Wk FI	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Recv Routing Wk FI	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Bu Attrib Wrk FI	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Pv Po Itm Descr FI	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Pv Recv Wpo CI FI	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Recv Wpo Dist Wk F	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Recv Putaway FI	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

OK Cancel

Page Permissions: Component Name PV\_RECV\_PO\_FL

11. Click OK.
12. Click Save, to save Permission List page.

## Task 23-2: Setting Up the PeopleSoft Search Framework Search Engine in Fluid Requisition

This section discusses:

- Understanding PeopleSoft Search Framework
- Indexing and Deploying Search Definitions
- Application Searching (Global Search) Security

## Understanding PeopleSoft Search Framework

Review the chapter "Configuring Global Search Using PeopleSoft Search Framework" for setup of Search Framework search engines which need to be completely installed and operational prior to Fluid Requisition object deployment and indexing.

See *PeopleTools: Search Technology*, "Understanding PeopleSoft Search Framework."

### Task 23-2-1: Indexing and Deploying Search Definitions

Fluid Requisition uses the following three Search Definitions:

- EP\_PV\_MASTERITEM\_SD
- EP\_PV\_MASTERITEMVENDOR\_SD
- EP\_PV\_EXPRESSITEMS\_SD

All search definitions for eProcurement must be deployed. In addition to the preceding search definitions, search category EP\_PV\_MASTERITEMVENDOR\_CAT must be deployed.

To deploy the search definitions and the search category:

1. Select PeopleTools, Search Framework, Administration, Deploy/Delete Object to display the Deploy Search Definitions page.
2. Select the three search definitions for eProcurement EP\_PV\_EXPRESSITEMS\_SD, EP\_PV\_MASTERITEMVENDOR\_SD, and EP\_PV\_MASTERITEM\_SD, and click the Deploy button.  
Search definitions must be deployed prior to indexing.
3. Select the Deploy Search Category tab to display the Display Search Category page.
4. Select the search category EP\_PV\_MASTERITEMVENDOR\_CAT, and click the Deploy button.

---

**Note.** For global search, search category EP\_CATALOG\_ITEMS should also be deployed.

---

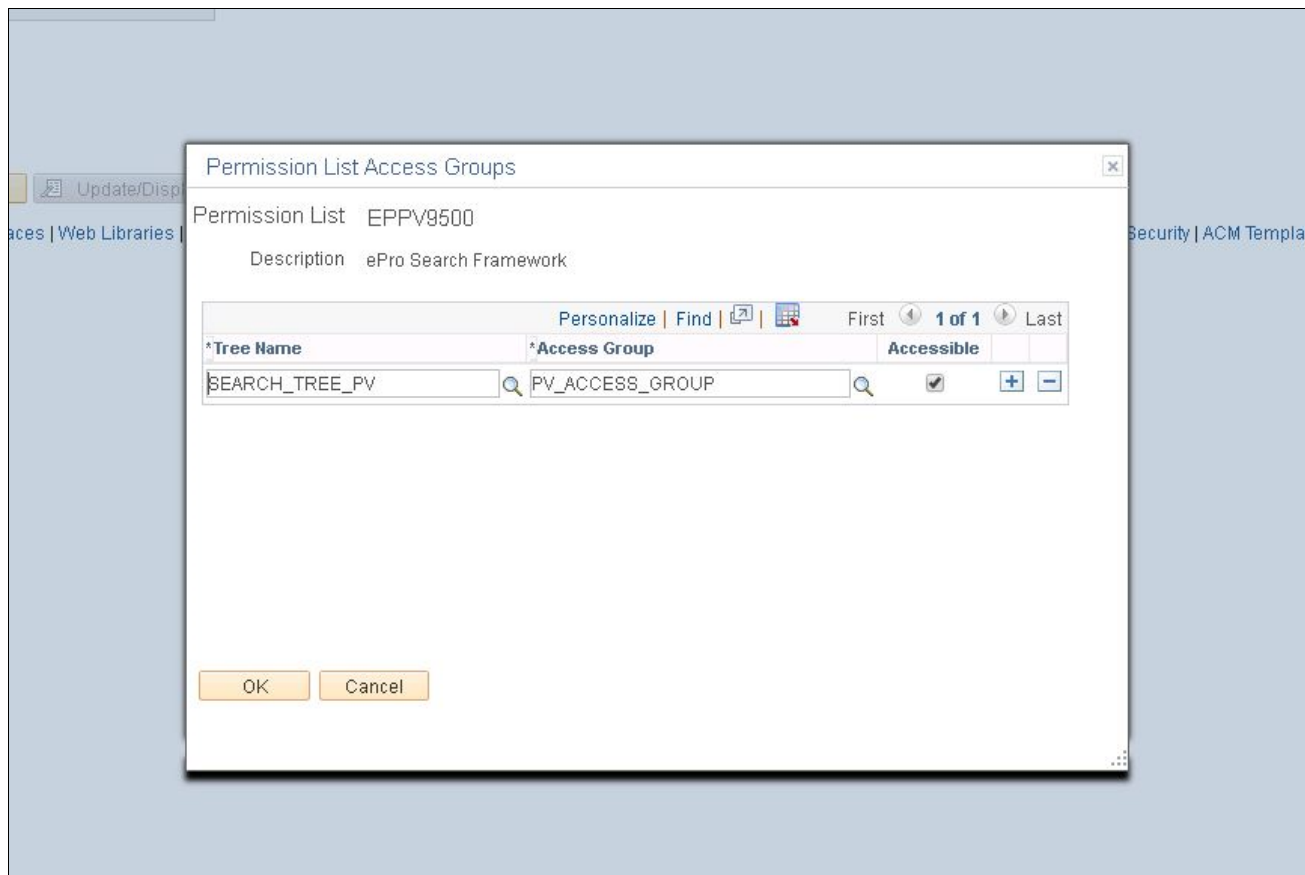
Before indexing the search definitions, verify that the user has been assigned to the Permission List EPPV9500.

This permission list is delivered with the role Search Query Administrator.

To verify:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV9500.
3. Select the Query tab.
4. Select the Access Group Permissions link.

- The Permission List is connected to the access group PV\_ACCESS\_GROUP, which is a part of Query Access Tree SEARCH\_TREE\_PV, as shown in the following example:



Permission List Access Groups page for EPPV9500

---

**Note.** PV\_ACCESS\_GROUP contains all the views that are used by PeopleSoft Query in order to extract data in Oracle SES indexing.

---

To index the eProcurement search definitions:

- Select PeopleTools, Search Framework, Administration, Schedule Search Index.
- Create a new run control ID.
- Select Search Definition *EP\_PV\_MASTERITEMVENDOR\_SD*.
- Select Full Index as the type of index, for the initial run.
- Select Base Language as the language option. If multi-language for database is enabled, then select All Languages to index multiple languages.
- Click Run to start the process.
- On the Process Scheduler Request page, click OK.
- On the Process Monitor page, verify that the process runs to success.

Repeat steps 1 through 8 for the search definitions *EP\_PV\_EXPRESSITEMS\_SD* and *EP\_PV\_MASTERITEM\_SD*.



To enable Search Framework for Fluid Requisition, select eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options, and select Catalog Search Type based on the search engine you have selected, as shown in the following example:

**Note.** Do not select *Structured Query Language* as the Catalog Search Type. If *Structured Query Language* is the only option available in the list, then it indicates that the Search Framework is not configured properly.

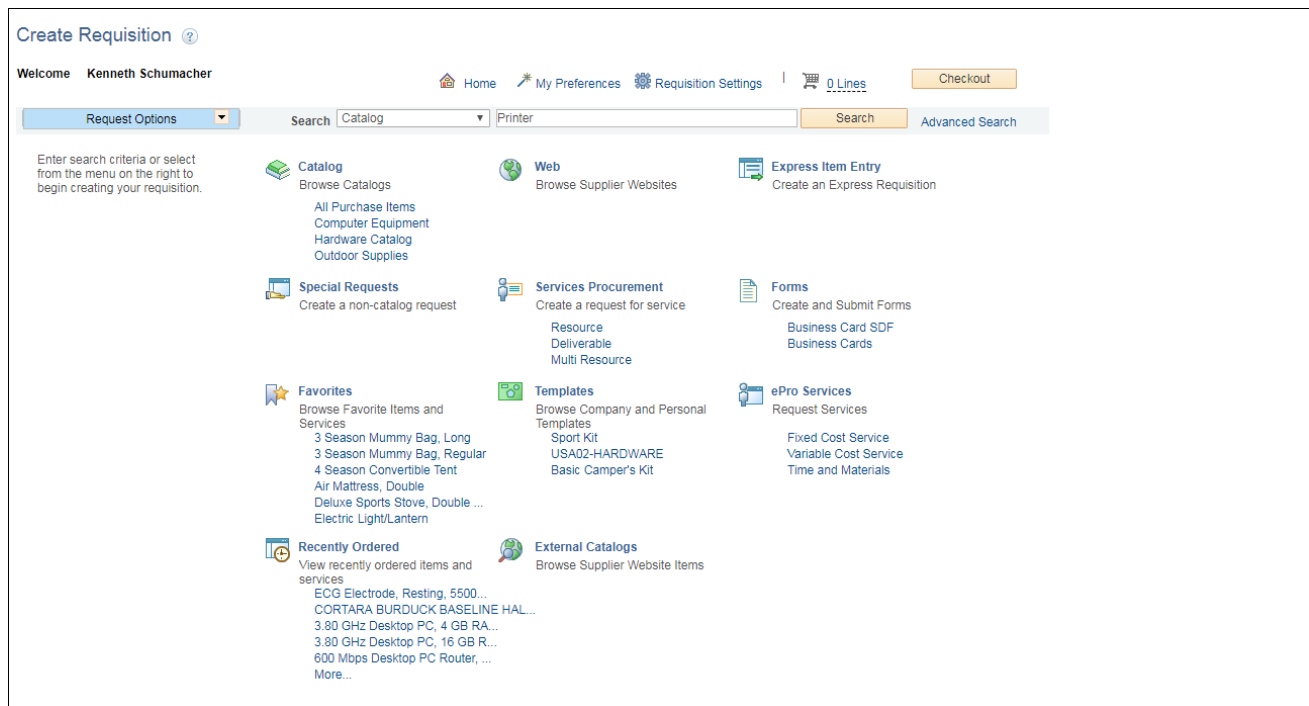
The screenshot displays the 'eProcurement Installation Options' page. At the top, there's a section for '\*sProcurement Installation Option' with a dropdown menu set to 'eProcurement with sProcurement'. Below this, there are checkboxes for 'eProcurement Connect' and 'Multi Image'. The 'Item Catalog Options' section includes an '\*Item Source Option' dropdown set to 'Master Items Only' and a checkbox for 'Catalog Management as eProcurement Item Source'. The 'Requisition Catalog Search' section features a '\*Catalog Search Type' dropdown set to 'Elastic Search', a 'Search Settings' link, and checkboxes for 'Non Dynamic Range', 'Override Existing Categories with Item Ranges', 'Allow Transparent Punchout Items', and 'Consolidate Marketplace Items in Search Results and Facets'. There's also a 'BU Catalog Control' input field set to 'N' and a 'Customize Search Results' link. The 'Requisition Display Options' section has checkboxes for 'Suppress trailing zeros for Quantity field' and 'Suppress trailing zeros up to the currency decimal position for Price field'. The 'Allow Saving Items in Favorites, Templates and Recently Ordered From' section includes checkboxes for 'Direct Connect' (checked) and 'Transparent Punchout'. The 'Max Rows To Retrieve For' section has input fields for 'Search Results' (50), 'Approval Monitor' (5), and 'Transparent Punchout' (25), along with a 'Requisition' input field (20). At the bottom, there's a checkbox for 'Display Approval Chunking' and two links: 'Return to Maintain Overall System Options' and 'Return to Administer Procurement'.

### eProcurement Installation Options page

To verify that the search engine is working:

1. Select eProcurement, Requisition.

2. In the search bar, select the search type as Catalog, and enter a suitable text to search, for example, *Printer*, as shown in the following example:



Requisition Page: Verify Search Type

3. Click Search. The Catalog Search Results page opens with the search results.  
In this page, the search results are displayed on the right panel, and the details pertaining to each search result are displayed on the left panel.

## Task 23-2-2: Application Searching (Global Search) Security

To activate Application Searching for catalog items, in addition to deploying and indexing all the regular eProcurement Search Definitions and Categories, an additional category EP\_CATALOG\_ITEMS must be deployed and specified as a Search Group. This category, like the category EP\_PV\_MASTERITEMVENDOR\_CAT, has all the required three search definitions mentioned in the previous section.

To perform Global Search, EP\_CATALOG\_ITEMS has to be assigned to a Permission List :

1. Select PeopleTools , Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. Select the Search Groups tab.

4. Select the catalog item EP\_CATALOG\_ITEMS from the lookup prompt, which is the Search Category specified as Search Group, as shown in the in the following example:

Permission EPPV1000  
List  
Description ePro Requisitions

**Search Groups** Personalize Find 1 of 1 First Last

*Search Group Name	Description
EP_CATALOG_ITEMS	Catalog Items

Save Return to Search Add Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | Web Libraries | Web Services | Personalizations | Query | Mass Change | Links | Audit | Data Migrati

Permission Lists page: Search Groups tab for EPPV1000

---

**Note.** Search categories flagged as search groups will only appear in the lookup prompt.

---

5. Click Save. Global Search bar appears after adding the search group.

---

**Note.** The user may need to log out and log in back to see the global search bar. Additionally, this type of searching must be activated as part of the Portal configuration.

---

The user associated with a role connected with the permission list and any search groups assigned as searchable targets should be able to see the global search bar.



## Appendix A

# Re-Deploying Mobile Inventory Web Services

You may have to re-deploy a Mobile Inventory web service, if the SOAP message sent by the web service is incorrect.

To redeploy the web services of any Mobile Inventory transaction, refer to this table to choose the correct web service:

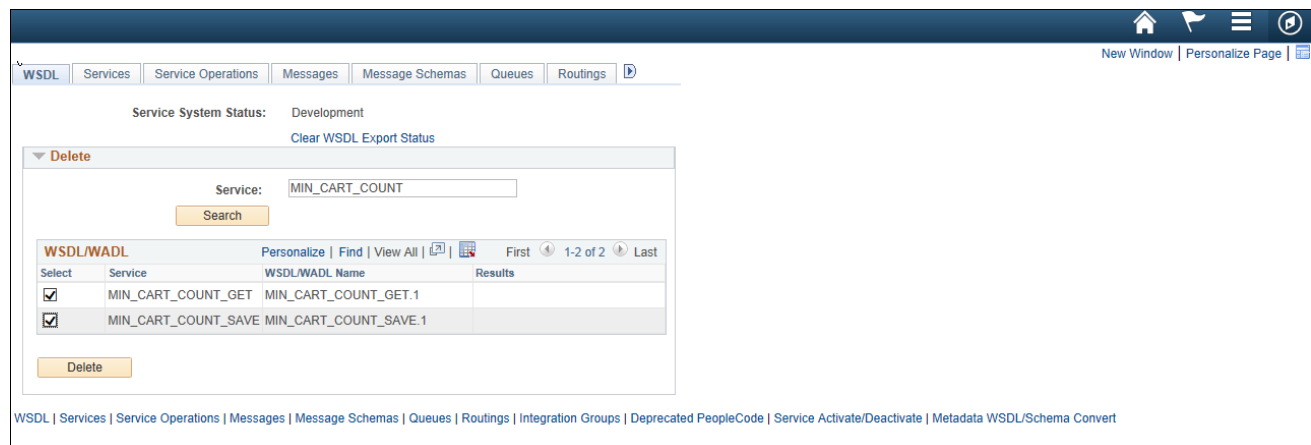
Mobile Inventory Transaction	Web Services
Par Count Par Count Ad Hoc	MIN_CART_COUNT_GET MIN_CART_COUNT_SAVE
Item Stock Inquiry	MIN_ITEM_STK_INQ
Guided Count Count by Location Count by Item Manual Count	MIN_COUNTING_EVENT_GET MIN_COUNTING_EVENT_SET MIN_COUNTING_EVENT_VALIDATE
Express Issue	MIN_EXPRESS_ISSUE MIN_EXPRESS_ISSUE_VALIDATE
Bin to Bin Transfer	MIN_BIN_TRANSFER
Adjustments	MIN_ADJUSTMENT
Fulfillment Inquiry	MIN_FUL_INQ_INV_DTL MIN_FUL_INQ_INV_HDR
Picking Feedback	MIN_PICK_FDB_SRC2_HDR MIN_PICK_FDB_SRCH_HDR MIN_PICK_SAVE
Receiving PO	MIN_RCPT_CNTR_GET MIN_RCPT_CNTR_SAVE
Receiving Ad Hoc	MIN_NPRCPT_SAVE

Mobile Inventory Transaction	Web Services
Delivery Cart Delivery	MIN_RECV_DELIVERY MIN_RECV_DELIVERY_SAVE
Common Services for all Mobile Inventory Transactions	MIN_ALT_TYPES_GET MIN_LOOKUP_GENERIC_GET MIN_MENU MIN_OPTIONS MIN_PROMPT_EDIT

To re-deploy web services:

1. Select PeopleTools, Integration Broker, Services Utilities, Service Admin to delete the existing web services.

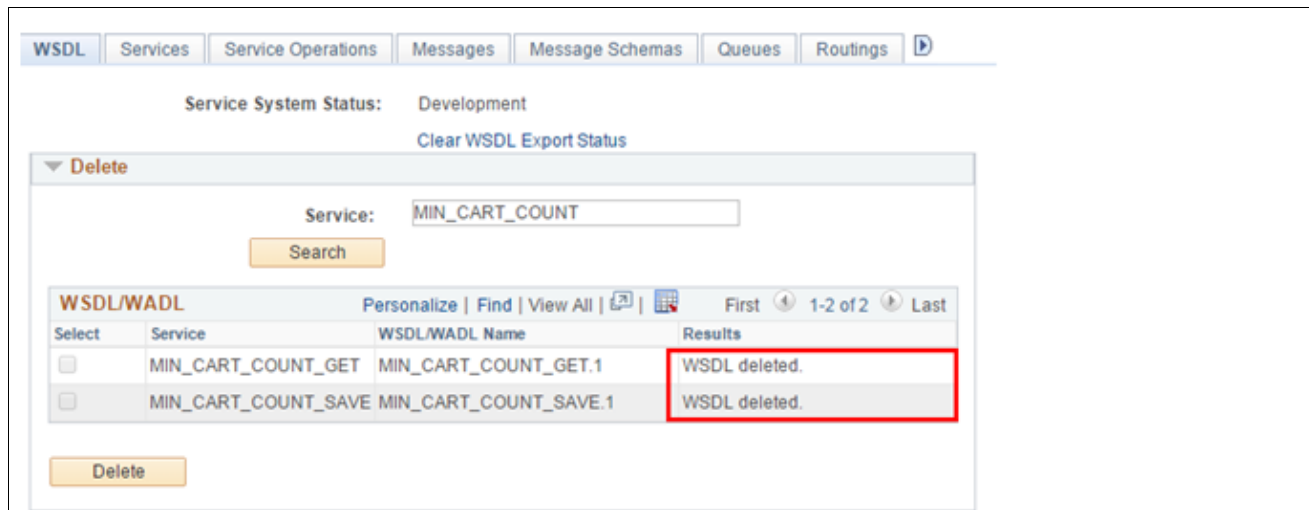
For example, for the mobile inventory transaction Par Count, select the web services MIN\_CART\_COUNT\_GET and MIN\_CART\_COUNT\_SAVE, as shown in this example:



Deleting existing web services

2. Click Delete.

3. Ensure that the web services are deleted completely, as shown in the following example:



Result- Deleting existing web services

4. Select PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Archive Monitor Data to open the Run Archive page.

**Note.** After deleting the web service, you need to archive the log files if the trace log is turned on.

5. To archive the log files, select the check boxes Archive All and Archive Synch, and click Run.
6. On the Process Monitor page, verify that the process runs to success.
7. Perform these steps to re-save all the messages in related service operations:
- Select PeopleTools, Integration Broker, Integration Setup, Service Operation to search for the service operation. For example, MIN\_CART\_COUNT\_GET.

- b. On the Service Operation page, under Message Information, for type *Request*, click the View Message link, as shown in the following example:

The screenshot displays the 'Service Operation' configuration page for 'MIN\_CART\_COUNT\_GET'. The 'General' tab is active, showing details like 'Operation Type: Synchronous' and 'Operation Description: Get Par Count for Mobile'. The 'Message Information' section at the bottom lists two message types: 'Request' and 'Response'. For the 'Request' type, the 'Message.Version' is 'MIN\_CART\_COUNT\_GET\_REQ.V1', and a 'View Message' link is highlighted with a red box. The 'Response' type has a version of 'MIN\_CART\_COUNT\_GET\_RSP.v1' and its own 'View Message' link. Navigation buttons at the bottom include 'Save', 'Return to Service', and 'Add Version'.

Service Operation page- View Message link for type Request

- c. On the Message Definition page, under Parts, click the message (for example, MIN\_CART\_COUNT\_KEY).
- d. Expand the message structure.



- e. Click Save, and then click OK to save the message structure, as shown in the following example:

The screenshot shows the 'Message Definition' page with the 'Schema' tab selected. The message is named 'MIN\_CART\_COUNT\_KEY' with version 'V1'. The description is 'Keys for Cart Count' and the owner ID is 'Mobile Inventory'. The 'Schema Exists' checkbox is checked and set to 'Yes'. The 'Message Type' is 'Rowset-based'. A 'Message' dialog box is open, displaying 'Message structure saved. (158,2190)' and an 'OK' button.

Saving Message Structure

- f. In the Message Definition page, click Save to return to the Service Operations page.

- g. In the Service Operations page, under Message Information, for type *Response*, click the View Message link, as shown in the following example:

The screenshot shows the 'Service Operations' page with tabs for 'General', 'Handlers', and 'Routings'. The 'General' tab is active. The 'Service Operation' is 'MIN\_CART\_COUNT\_GET', 'Operation Type' is 'Synchronous', and '\*Operation Description' is 'Get Par Count for Mobile'. The 'Owner ID' is 'Mobile Inventory'. The 'Default Service Operation Version' is 'v1'. The 'Message Information' section shows two messages: 'Request' (MIN\_CART\_COUNT\_GET\_REQ.V1) and 'Response' (MIN\_CART\_COUNT\_GET\_RSP.V1). The 'View Message' link for the 'Response' message is highlighted with a red box. Other sections include 'Runtime Schema Validation', 'Routing Status', and 'Routing Actions Upon Save'.

Service Operation page- View Message link for type Response

- h. On the Message Definition page, under Parts, click the message (for example, MIN\_CART\_COUNT\_DETAIL).
- i. Expand the message structure.

**Note.** You can verify if the missing fields are defined here.

- j. Click Save, and then click OK to save the message structure.
- k. In the Message Definition page, click Save to return to the Service Operations page.
- l. In the Service Operations page, click Save.

Service operations saved message is displayed.

- m. Repeat steps *a* through *l* to re-save all the messages for service operation MIN\_CART\_COUNT\_SAVE.
8. When the service operations are re-saved for both MIN\_CART\_COUNT\_GET and MIN\_CART\_COUNT\_SAVE, re-generate the two web services.

To re-generate:

- a. Select PeopleTools, Integration Broker, Web Services, Provide Web Services, and search for these two web services.

- b. In the search result, select these two web services, as shown in the following example, and click Next:

**Provide Web Service Wizard** Step 1 of 4

1 2 3 4 [Next >](#)

### Select Services

Enter search criteria and click Search. Select one or more services you would like to provide.

**Search Criteria**

Service Name begins with MIN\_CART

Description begins with

Object Owner ID equals

☐ REST Service

[Search](#)

**Search Results** Find | View All | 1-2 of 2 First 1-2 of 2 Last

Service	Description
<input checked="" type="checkbox"/> MIN_CART_COUNT_GET	Get Par Locations for Mobile
<input checked="" type="checkbox"/> MIN_CART_COUNT_SAVE	Save Par Locations for Mobile

☒ [Select All](#) ☐ [Clear All](#)

Selecting Web Services

- c. Select the service operations associated with each web service, as shown in the following example:

**Provide Web Service Wizard** Step 2 of 4

1 2 3 4 [< Previous](#) [Next >](#)

### Select Service Operations

Select one or more operations for each service.

Service MIN\_CART\_COUNT\_GET Description Get Par Locations for Mobile

☐ Use Service Alias in WSDL

☐ Use Secure Target Location

☐ Generate WSDL 2.0

**Operations** Find | View All | 1 of 1 First 1 of 1 Last

Service Operation	Description	Operation Type	Request Message	Response Message	Fault Message
<input checked="" type="checkbox"/> MIN_CART_COUNT_GET.v1	Get Par Count for Mobile	Synchronous	MIN_CART_COUNT_GET_REQ.V1	MIN_CART_COUNT_GET_RSP.V1	

☒ [Select All](#) ☐ [Clear All](#)

Service MIN\_CART\_COUNT\_SAVE Description Save Par Locations for Mobile

☐ Use Service Alias in WSDL

☐ Use Secure Target Location

☐ Generate WSDL 2.0

**Operations** Find | View All | 1 of 1 First 1 of 1 Last

Service Operation	Description	Operation Type	Request Message	Response Message	Fault Message
<input checked="" type="checkbox"/> MIN_CART_COUNT_SAVE.v1	Save Par Count for Mobile	Synchronous	MIN_CART_COUNT_SAVE_REQ.V1	MIN_CART_COUNT_SAVE_RSP.V1	

Selecting Service Operations

- d. Click Next.

Review the Results page, as shown in the following example:



Results Page

You can copy the generated WSDL URL into a browser to verify if the WSDL works.

You can verify if the re-deployment of web services is working fine.

To verify:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Search for the service operations associated with the web service MIN\_CART\_COUNT\_GET.
3. On the Service Operations page, select the Routings tab.
4. On Routing Definitions, click on the routing name to open the IB Routing Definitions page.

5. Set the Log Detail field as *Header and Detail* to turn on the log flag, as shown in the following example:

The screenshot shows the 'IB Routing Definitions' dialog box with the 'Routing Definitions' tab selected. The 'Log Detail' dropdown menu is highlighted with a red box, showing 'Header and Detail' selected. The dialog box contains various fields for routing configuration, including 'Routing Name', 'Service Operation', 'Version', 'Description', 'Sender Node', 'Receiver Node', 'Operation Type', and 'Log Detail'.

Switch On the Log Flag

6. In your mobile device, load the Par Count data.
7. Login to the PIA, and verify the generated web service xml data by following these steps:
- Select PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Synchronous Services.
  - Search for the service operation MIN\_CART\_COUNT\_GET.
  - On the Transactions tab, click the Details link of a transaction, as shown in the following example:

The screenshot shows the 'Synchronous Services' page. The 'Details' link for a transaction is highlighted with a red box. The page displays a table of transactions with columns for Timestamp, Transaction ID, Service Operation, Version, Trans Type, Pub Node, and Status String. The 'Details' link is located next to the Status String for the first transaction.

Timestamp	Transaction ID	Service Operation	Version	Trans Type	Pub Node	Status String	Details
04/16/15 8:24:07.062540PM	34bebbd3-e4b1-11e4-8240-b2d0f21015f6	MIN_CART_COUNT_GET	v1	InSync	ANONYMOUS	DONE	Details
04/16/15 8:16:38.952950PM	29a47da6-e4b0-11e4-ba7f-9b5055f69502	MIN_CART_COUNT_GET	v1	InSync	ANONYMOUS	DONE	Details

View Details

- d. In the Synchronous Details page, click the View XML link to view the response message, as shown in the following example:

**Synchronous Details**

Transaction ID:	34bebbd3-e4b1-11e4-a549-b2d0f21015f6		
Service Operation:	MIN_CART_COUNT_GET		
Service Version:	v1	<a href="#">Archive</a>	
Transaction Type:	InSync	<a href="#">Delete</a>	
Status:	DONE		

Publisher:		Non-Repudiation ID:	
Destination Publish Node:	E920P2P	Updated:	04/16/15 8:24:07PM
Pub Node:	ANONYMOUS		
Final Destination:			
Pub/Sub Timestamp:	04/16/15 8:24:07.062540PM		
Log Type:	Response - Original ▼	<a href="#">View XML</a>	<a href="#">View IB Info</a>

[Return to Search](#)

View Response Message

- e. Compare the response message with the latest Par Count Standard message (which you will get after applying changes).
8. Repeat steps 2 through 7 for web service MIN\_CART\_COUNT\_SAVE.
- If any fields are missing, re-deploy the web services and check for the missing fields in message definition.

## Appendix B

# Applying Common Installation Instructions

## **Task B-1: Setting Up Integration Gateways**

---

To set up integration gateways in PeopleSoft FSCM/HCM environment:

1. In your PeopleSoft FSCM/HCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways, and click Search.

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

### Gateways

Gateway ID LOCAL

☒ Local Gateway
☐ Load Balancer

URL

Inbound Gateways
JMS Administration

Gateway Setup Properties

Connectors			Personalize   Find	First	1-14 of 14	Last
*Connector ID	Description	*Connector Class Name				
1 APNS_TARGETCONNEC		APNTargetConnector	Properties			
2 AS2TARGET		AS2TargetConnector	Properties			
3 EXAMPLETARGETCONNI		ExampleTargetConnector	Properties			
4 FILEOUTPUT		SimpleFileTargetConnector	Properties			
5 FTPTARGET		FTPTargetConnector	Properties			
6 GETFILE		GetFileTargetConnector	Properties			
7 GETMAILTARGET		GetMailTargetConnector	Properties			
8 HTTPTARGET		HttpTargetConnector	Properties			
9 JMSTARGET		JMSTargetConnector	Properties			
10 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties			
11 PSFTTARGET		PeopleSoftTargetConnector	Properties			
12 RIDCTARGET		RIDCTargetConnector	Properties			
13 SFTPTARGET		SFTPTargetConnector	Properties			
14 SMTPTARGET		SMTPTargetConnector	Properties			

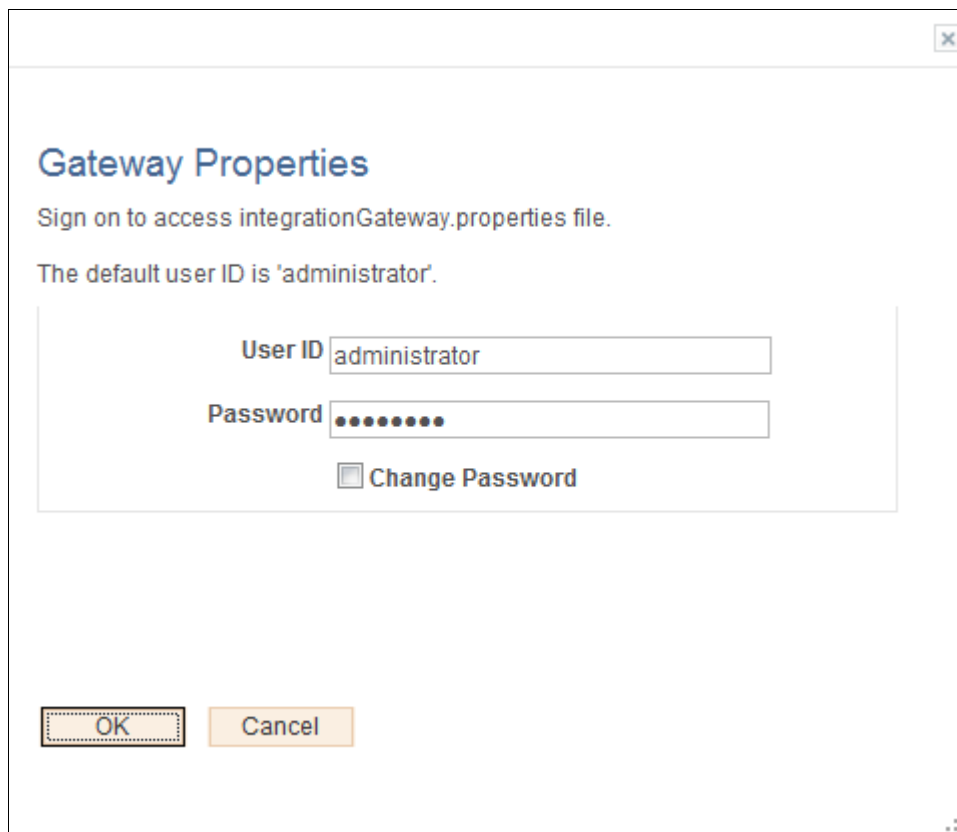
Gateways page for the Local Gateway

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



6. Click the Gateway Setup Properties link.

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



**Gateway Properties**

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

☐ Change Password

Gateway Properties signon page

7. On the Gateway Properties signon page, enter the user ID and password for the Integration Gateway.  
If you do not know the user ID and password of the Integration Gateway, contact your system administrator.

## 8. Click OK.

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

PeopleSoft Node Configuration

URL: http://localhost:8000/PSiGW/PeopleSoftListeningConnector

**Gateway Default App. Server**

App Server URL: localhost9000

User ID: VP1

Password: \*\*\*

Tools Release: 8.56-901-R1

Domain Password: \*\*\*

Virtual Server Node:

**PeopleSoft Nodes**

Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	localhost9000	VP1	***	8.56-901-R1	***	Ping Node + -
PSFT_HR	localhost9000	PS	***	8.56-901-R1	***	Ping Node + -

Advanced Properties Page

OK Cancel Save

PeopleSoft Node Configuration page

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

- App Server URL
- User ID— typically ID of a super user of your system (VP1 in this example).
- Password— typically password of a super user of your system (VP1 in this example).
- Tools Release

## 10. You must add both the PSFT\_EP node and PSFT\_HR node in the PeopleSoft FSCM and HRMS application respectively.

As necessary, click the Add (+) button to add the default local node. For FSCM application server node, add PSFT\_EP and for HCM application server node, add PSFT\_HR.

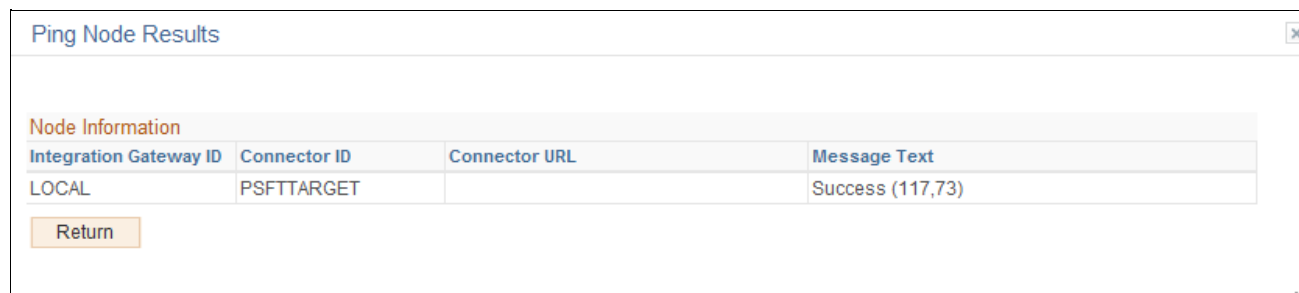
## 11. In the Tools Release field, enter the PeopleSoft PeopleTools release number.

Enter the exact release number that you obtain from pinging the gateway. Such as 8.56; it must match exactly.

## 12. Click Save.

- Click the Ping Node button to ping the node (for FSCM PSFT\_EP node and for HCM PSFT\_HR node) and verify that it is responding.

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



Node Information			
Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Return

Ping Node Results page

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

## Task B-2: Activating the Domain

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Before activating the local domain in PeopleSoft FSCM/HCM, verify that the PUB server is up and running.

To activate the local domain in PeopleSoft FSCM/HCM:

1. In your PeopleSoft FSCM 9.2 environment, select People Tools, Integration Broker, Service Operations Monitor, Administration and Domain Status.

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

Domain Status page

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

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

## Task B-3: Setting Up Message Node Definitions

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

1. In your PeopleSoft FSCM/HCM 9.2 environment, select People Tools, Integration Broker, Integration Setup, Nodes.

- On the Nodes search page, search for and select the node name. For FSCM, search for *PSFT\_EP* and for HCM, search for *PSFT\_HR*.

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

The screenshot displays the 'Node Definitions' page for the 'PSFT\_EP' node. The page has a navigation bar with tabs: 'Node Definitions' (selected), 'Connectors', 'Portal', 'WS Security', and 'Routings'. The form contains the following fields and options:

- Node Name:** PSFT\_EP
- \*Description:** Financials/Supply Chain
- Node Type:** PIA
- \*Authentication Option:** Password (dropdown menu)
- Node Password:** [Masked with dots]
- Confirm 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, there are checkboxes for the following properties:

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

Buttons at the top right include 'Copy Node' and 'Rename Node'. At the bottom left is a 'Save' button, and at the bottom center is a 'Return to Search' button. The footer shows a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions page for FSCM - PSFT\_ EP Node

- On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
- In the Node Password field, enter a password.
- In the Confirm Password field, re-enter the password.
- Click Save, then click the Return to Search button.

7. On the Nodes search page, search for and select the node name *PSFT\_HR*.

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

The screenshot displays the 'Node Definitions' page for the 'PSFT\_HR' node. The page is organized into several sections:

- Navigation Tabs:** Node Definitions (selected), Connectors, Portal, WS Security, Routings.
- Node Information:**
  - Node Name:** PSFT\_HR
  - \*Description:** PS HCM - Human Captical Mgt
  - \*Node Type:** PIA (dropdown menu)
  - \*Authentication Option:** Password (dropdown menu)
- Node Properties:**
  - Node Password:** [Redacted]
  - Confirm Password:** [Redacted]
  - \*Default User ID:** PS (with search icon)
  - Hub Node:** [Redacted] (with search icon)
  - Master Node:** [Redacted] (with search icon)
  - Company ID:** [Redacted]
  - IB Throttle Threshold:** [Redacted]
  - Image Name:** [Redacted] (with search icon)
  - Codeset Group Name:** [Redacted] (with search icon)
- Checkboxes:**
  - ☐ Default Local Node
  - ☐ Local Node
  - ☒ Active Node
  - ☐ Non-Repudiation
  - ☐ Segment Aware
- Action Buttons:** Copy Node, Rename Node, Delete Node.
- Footer:**
  - Save** button
  - Return to Search** button
  - Navigation links: Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions page for FSCM - PSFT\_HR node

The screenshot shows the 'Node Definitions' tab selected. The 'Node Name' is 'PSFT\_HR' and the '\*Description' is 'Human Capital Management'. The 'Node Type' is 'PIA'. The '\*Authentication Option' is set to 'Password'. The 'Node Password' field is masked with three dots. The '\*Default User ID' is 'PS'. The 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', and 'Codeset Group Name' fields are empty. The checkboxes for 'Default Local Node', 'Local Node', and 'Active Node' are checked, while 'Non-Repudiation' and 'Segment Aware' are unchecked. The 'Copy Node' and 'Rename Node' buttons are in the top right. 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 center.

Node Definitions for HCM - PSFT\_HR node

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

## Task B-4: Setting Up Portal Nodes

This section discusses:

- Understanding Portal Node Set Up
- Setting Up Portal Nodes in PeopleSoft FSCM/HCM

### Task B-4-1: Understanding Portal Node Set Up

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

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

## **Task B-4-2: Setting Up Portal Nodes in PeopleSoft FSCM/HCM**

To set up portal node definitions in the PeopleSoft FSCM/HCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name. For FSCM, select *ERP* and for HCM, select *HRMS*.



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

The screenshot displays the 'Portal' tab within the 'Node Definitions' section. The 'Node Name' is set to 'ERP'. The 'Details' section includes the following fields and options:

- Description:** Portal Node - ERP
- Default Portal:** EMPLOYEE (selected from a dropdown menu)
- Tools Release:** 8.56-901.3
- Application Release:** Financials/SCM 9.20.
- Content URI Text:** http://<server>:<port>/psc/pshome/ (with an example: http://someserver/psc/pshome/)
- Portal URI Text:** http://<server>:<port>/psp/pshome/ (with an example: http://someserver/psp/pshome/)
- Local Node:** ☒ Local Node
- Portal Host Node:** ☐ Portal Host Node
- Network Node Name:** (empty text field)

At the bottom, there are two buttons: 'Save' and 'Return to Search'. A breadcrumb trail at the very bottom reads: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Portal Node page for FSCM - ERP node

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

Node Name HRMS

**Details**

Description Portal Node - HRMS ☒ Local Node

Default Portal EMPLOYEE ▼

Tools Release 8.56

Application Release HRMS 9.2

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

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

☐ Portal Host Node

Network Node Name

Save

Return to Search

Node Definitions | Connectors | Portal | WS Security | Routings

Portal Node page for FSCM - HRMS node

4. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM/HCM environment.
5. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM/HCM environment.
6. Click Save.
7. Click the Return to Search button.