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# PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 27) Installation

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**March 2018**

PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 27)

## 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.

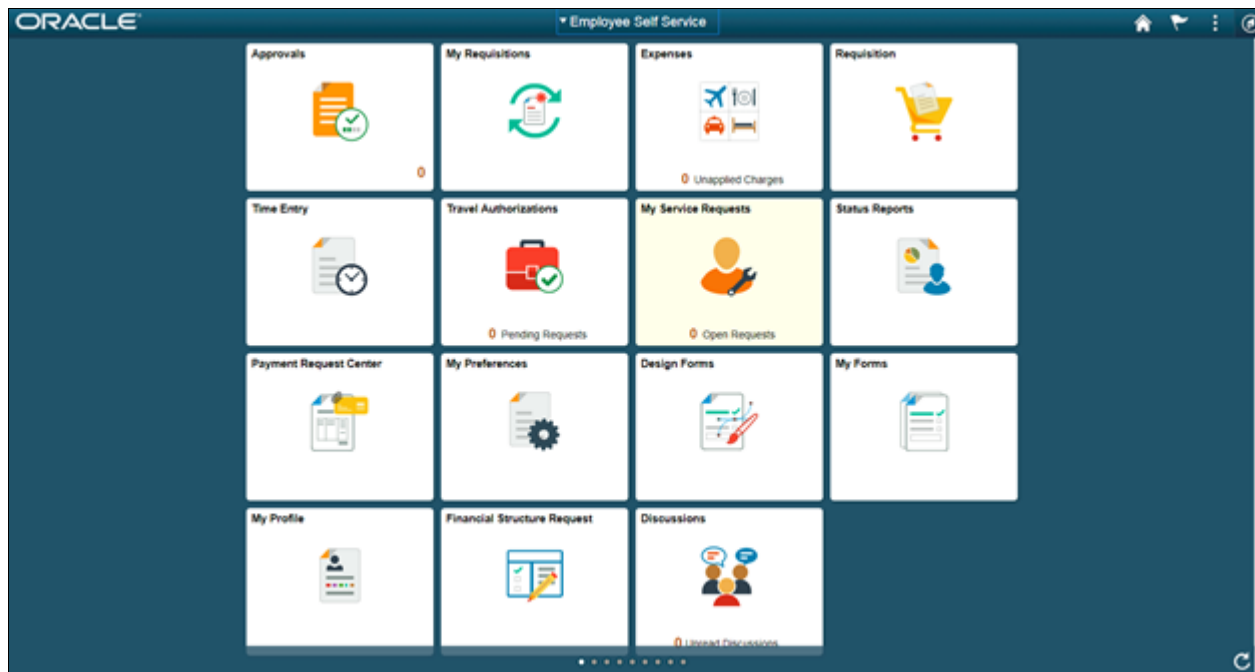
---

## Task 1-3: Using the Fluid User Interface

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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.

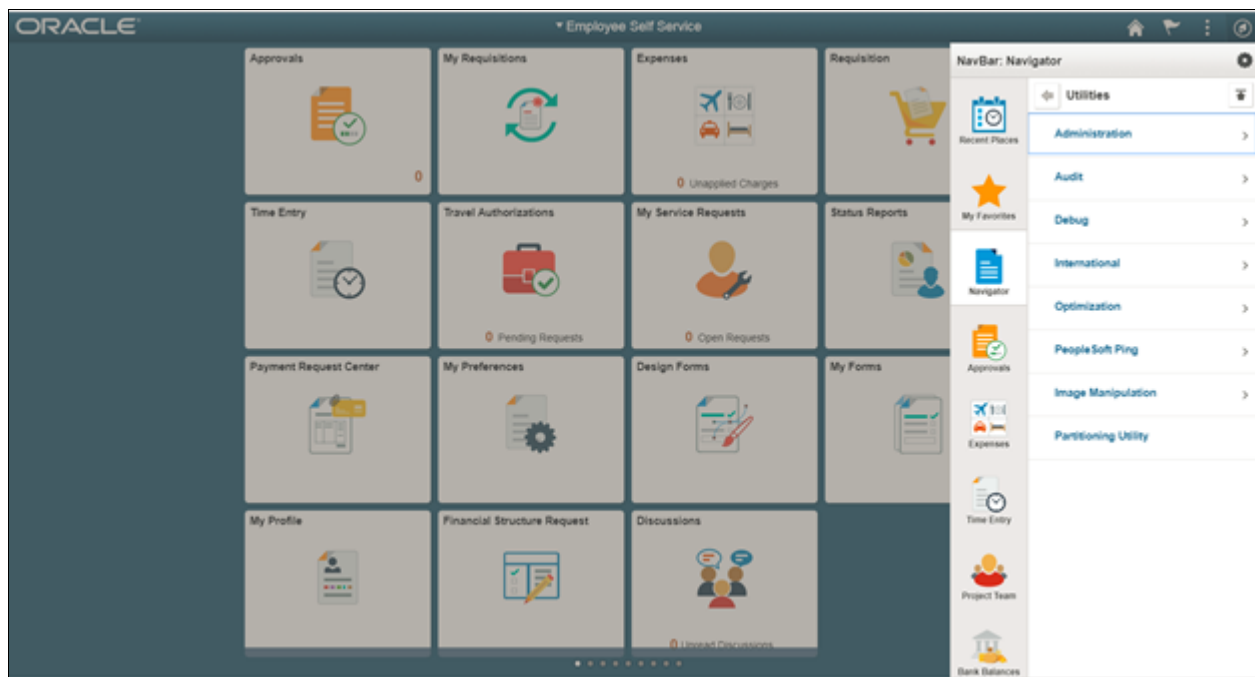
2. Select (press) Navigator.



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

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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.

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See *PeopleSoft FSCM: Applications Fundamentals*.

## Prerequisites

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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:

The screenshot shows the 'Search Administration Activity guide' interface. On the left, the 'Configuration' section is expanded, and 'Attachment URLID List' is selected. The main content area is titled 'Attachment URLIDs' and 'URLID List used by Search Framework Attachments'. It features a table with the following data:

URLID List	Description
1 EOFD_FILE_ATTACH	Discussion Attachments
2 PSSESATT_1	SES URL from File Attachments
3 PSSESATT_2	SES URL from File Attachments
4 PSSESATT_3	SES URL from File Attachments

Below the table is a 'Save' button. The top of the interface shows 'Search Administrator' and 'Search Administration' tabs.

Attachments URLIDs List page

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

**Administer File Attachments**

\*Pick Active Server 1

**File Attachment Servers**

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	Search URL Equivalent
1	FTP	ftpuser	*****	*****	10.244.0.253	FSCM91	PSESATT_1
2	FTP	ftpuser	*****	*****	pf-sun07	fscm90	PSESATT_2
3	DB				PV_ATT_DB_SRV		PSESATT_3
4	URL				COMMON_ATT_S_RI		

► Component Subdirectories

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 Search 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: 1 ▾    Add URL Server    Add FTP Server    Add Database Server

**File Attachment Servers**

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	Search 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_ATTTS_RI		

► 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 Search 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:

The screenshot shows the 'URL Maintenance' page in a web application. The page has a light blue header with the title 'URL Maintenance'. Below the header, there are several fields for editing a URL record. The 'URL Identifier' is 'PSSESATT\_1'. The '\*Description' is 'SES URL from File Attachments'. The '\*URLID' is 'ftp://10.244.0.253/'. The 'Comments' field contains a message: 'This URL was automatically added from NOT modify this URL from this page. Go Common Definitions > File Attachments this URL'. A 'URL Properties' button is located below the comments field. A modal dialog box titled 'URL Properties' is open in the foreground. It has a 'Properties' section with a table of property names and values. The table has two columns: 'Property Name' and 'Property Value'. The first row has 'PASSWORD' and a masked value. The second row has 'USER' and 'FTPUSER'. There are search icons and plus/minus buttons for each row. Below the table is a 'Password Encryption' section with a plus icon. At the bottom of the dialog are 'OK' and 'Cancel' buttons. At the bottom of the main page, there is a toolbar with buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'.

**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**

Property Name	Property Value
PASSWORD	.....
USER	FTPUSER

► Password Encryption

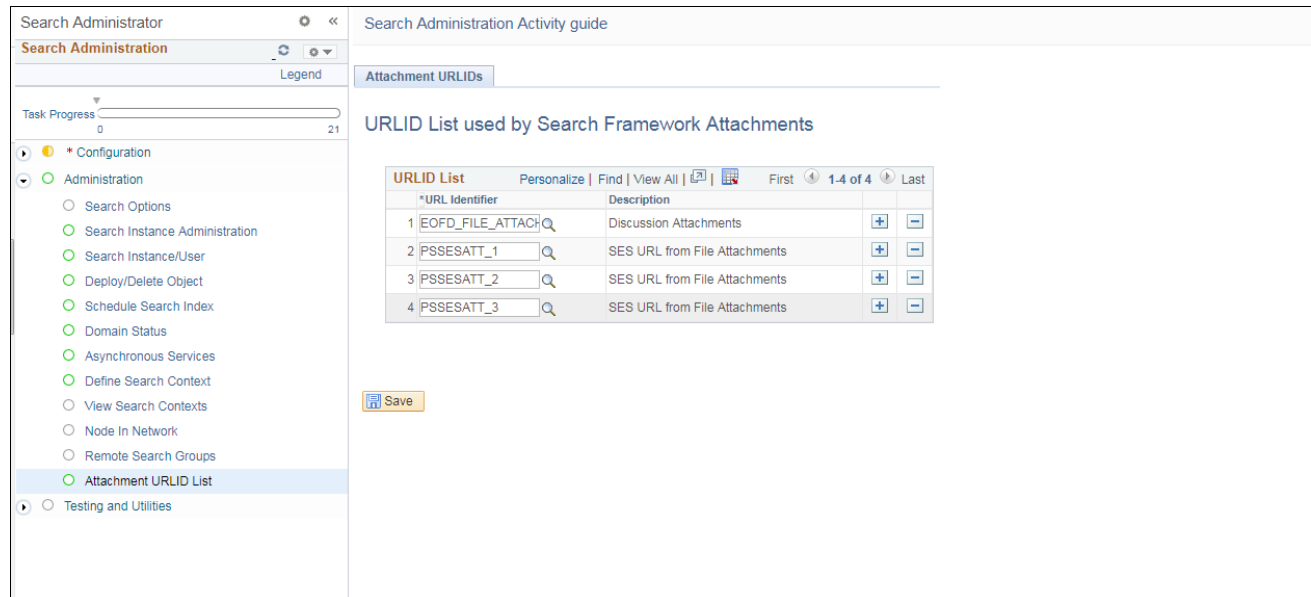
OK Cancel

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.

---

Change Properties

Personalize   Find   View All   First 1-10 of 41 Last				
Enable ?	Disable ?	Materialized Query Table	Status	Tablespace Name
<input type="checkbox"/>	<input type="checkbox"/>	APOD_APPCSUM_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOD_DELVCHR_M	Disabled	SYSTSTAB
<input type="checkbox"/>	<input type="checkbox"/>	APOD_HLDVCHR_M	Disabled	SYSTSTAB
<input type="checkbox"/>	<input type="checkbox"/>	APOD_INVCSUM_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOD_PYMTLAT_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOD_PYMTSUM_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOP_APPCSUM_M	Disabled	SYSTSTAB
<input type="checkbox"/>	<input type="checkbox"/>	APOP_APPRVCH_M	Disabled	PTTBL
<input type="checkbox"/>	<input type="checkbox"/>	APOP_BSEPYMT_M	Disabled	PSIMAGE2
<input type="checkbox"/>	<input type="checkbox"/>	APOP_CANPYMT_M	Disabled	SYSTSTAB

### Change Properties: Materialized View

For more properties on this page,

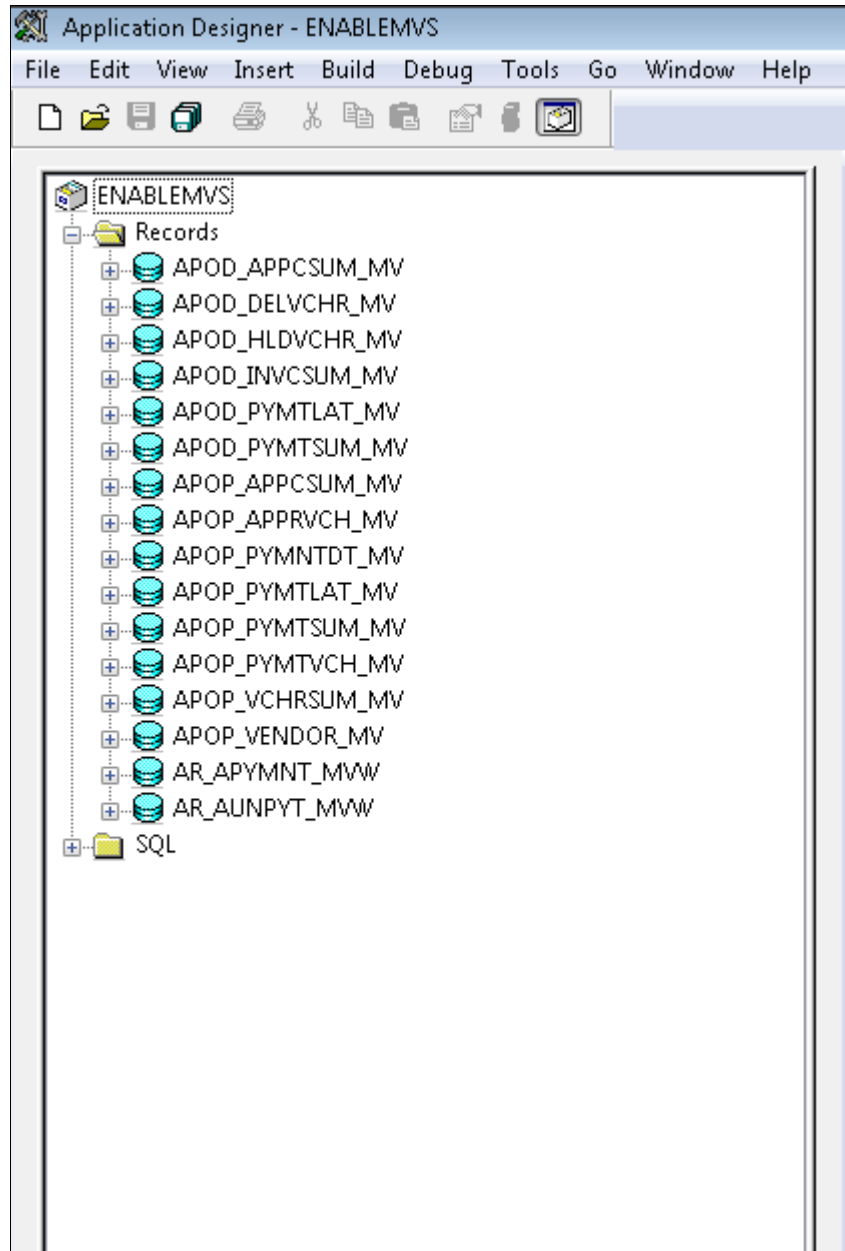
See PeopleSoft PeopleTools: Data Management, "Administering PeopleSoft Databases on Oracle", Using Materialized Views.

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 SRReport ManagerProcess MonitorRun

☐ Select All Owner

Refresh ?	Materialized Query Table	Materialized	Query Optimization?	Query Optimization	Refreshed	Last Refresh Date	Staleness	
1 <input type="checkbox"/>	<input type="text" value="APOD_APPCSUM_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
2 <input type="checkbox"/>	<input type="text" value="APOD_DELVCHR_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
3 <input type="checkbox"/>	<input type="text" value="APOD_HLDVCHR_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
4 <input type="checkbox"/>	<input type="text" value="APOD_INVCSUM_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
5 <input type="checkbox"/>	<input type="text" value="APOD_PYMTLAT_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
6 <input type="checkbox"/>	<input type="text" value="APOD_PYMTSUM_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
7 <input type="checkbox"/>	<input type="text" value="APOP_APPCSUM_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
8 <input type="checkbox"/>	<input type="text" value="APOP_APPRVCH_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
9 <input type="checkbox"/>	<input type="text" value="APOP_BSEPYMT_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<input type="button" value="+"/> <input type="button" value="-"/>
10 <input type="checkbox"/>	<input type="text" value="APOP_CANPYMT_MV"/> <input type="button" value="Q"/>	No	<input type="checkbox"/>	Disabled	No	01/01/1900 12:00:00.000000AM	STALE	<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 PTDOCLBRun 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 Payables 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 area is a 'Report List' 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 message states: 'Click the delete button to delete the selected report(s)'.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	17633	75748	GM_EDl	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>

☒ Select All    ☐ Deselect All  
    Click the delete button to delete the selected report(s)

[List](#) | [Explorer](#) | [Administration](#) | [Archives](#)

Report Manager page- Administration tab

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

- 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**

Report ID 22556      Process Instance 133893      [Message Log](#)  
Name GM\_EDI      Process Type Application Engine  
Run Status Success

GM\_EDI

**Distribution Details**

Distribution Node PRCS5529      Expiration Date 08/28/2017

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">AE_GM_EDI_133893.stdout</a>	288	08/21/2017 5:56:44.546600AM PDT
<a href="#">PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.XML</a>	431	08/21/2017 5:56:44.546600AM PDT
<a href="#">PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.xfdf</a>	663	08/21/2017 5:56:44.546600AM PDT
<a href="#">PI-PRP001_V101_MAIN.XML</a>	7,357	08/21/2017 5:56:44.546600AM PDT
<a href="#">PI-PRP001_V101_MAIN.xfdf</a>	10,617	08/21/2017 5:56:44.546600AM PDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	VP1

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.  
☐ Purge Data

☒ Archive ☒ Unordered  
 Queue Status: Run  
 Owner ID: Expenses

**Operations Assigned to Queue**

Service Operation	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, Add Field, 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	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	

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.

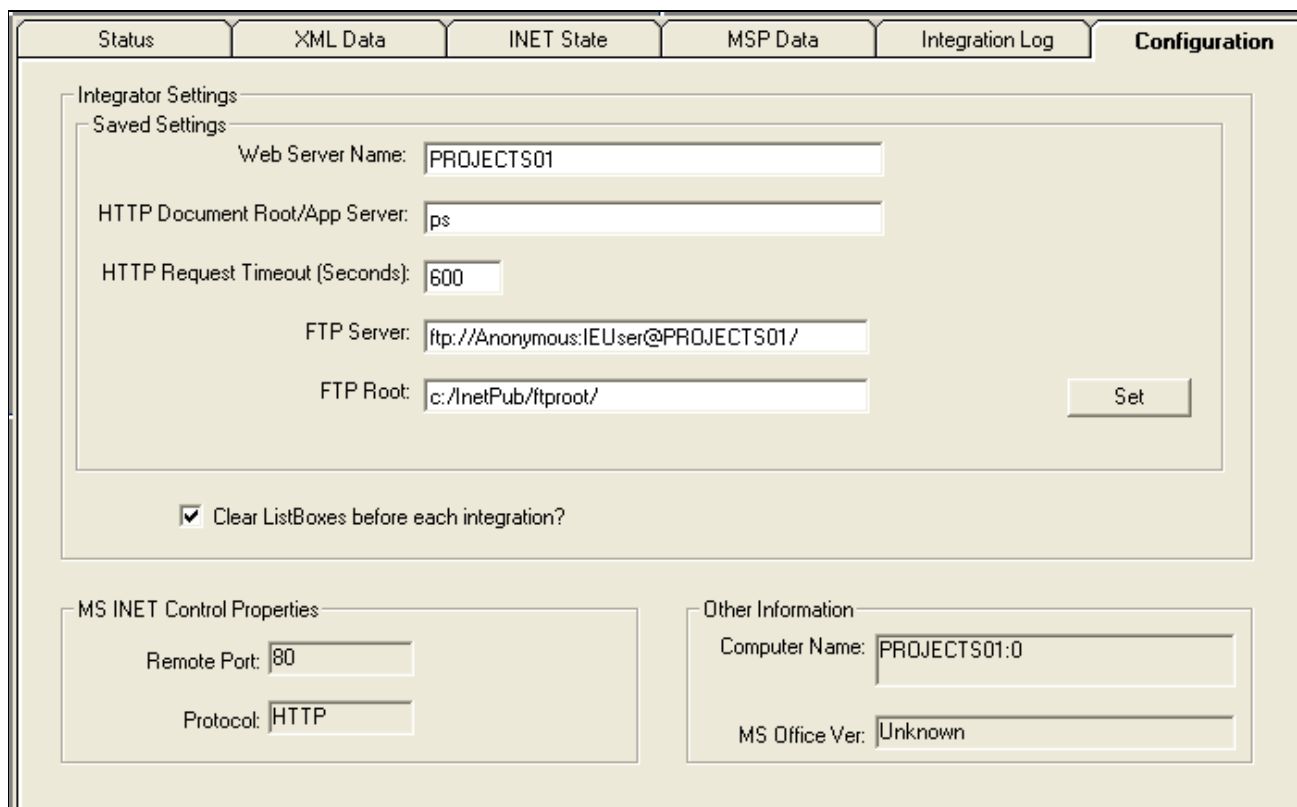
For example:

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.

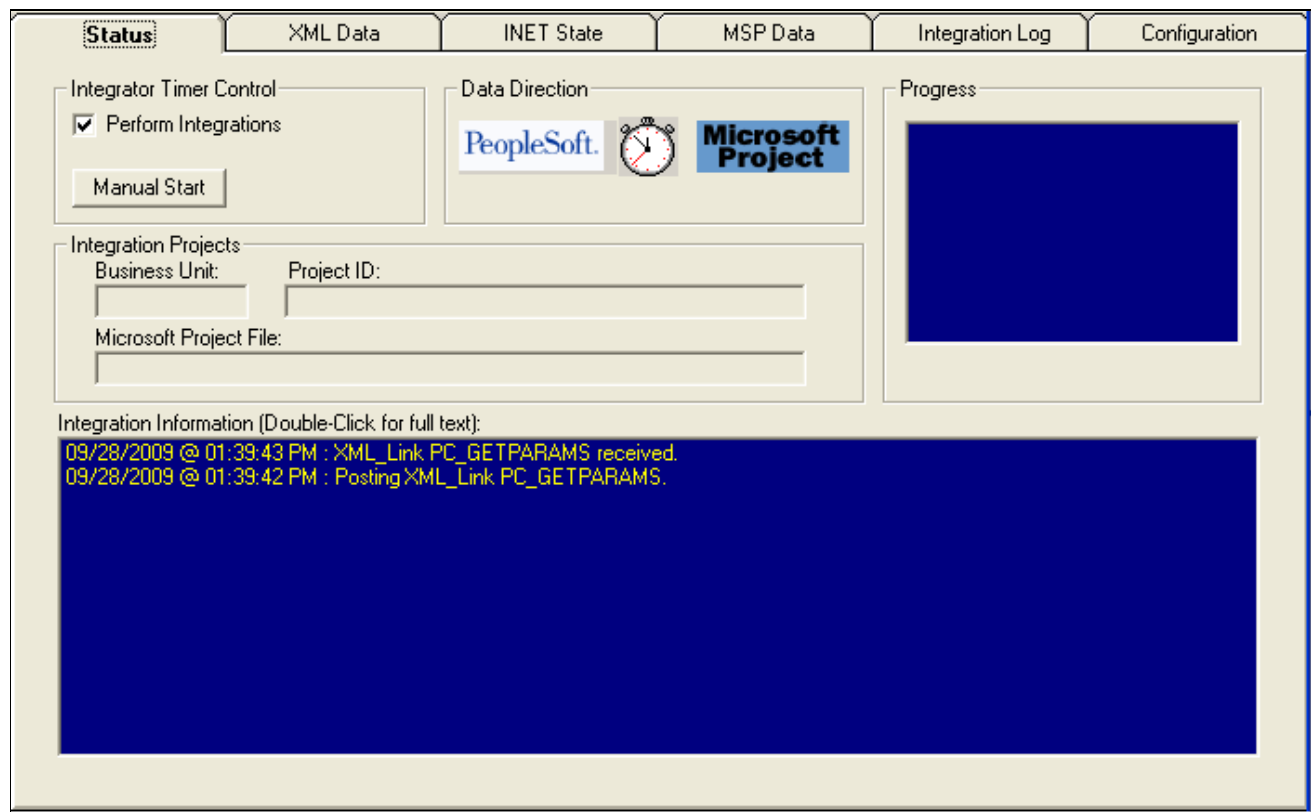
- In the FTP Server field, enter the FTP server that this integrator uses to direct the application server to send the .mpp files for integration.
  - In the FTP Root field, enter the Windows file path to the root location of the FTP server. This is the file path that Microsoft Project uses to find the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

---

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: 1 ▾    Add URL Server    Add FTP Server    Add Database Server

**File Attachment Servers**

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	Search 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_ATTTS_RI		

► 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:

The screenshot displays the Staffing Installation page. It features two main sections: 'Apply Online' and '3rd Party Integrations'. The 'Apply Online' section contains five fields: 'Department SetID' (SHARE), 'Employee Self Service Deptid' (10000), 'Default Attachment Type' (REFLT), 'Candidate Registration' (Optional Registration), and 'After Update Status' (Applicant Pending). The '3rd Party Integrations' section includes checkboxes for 'Resume Parsing Provider' and 'Job Board Distributor Provider'. The 'Resume Parsing Provider' section has 'Supplier ID' and 'Language Code' dropdowns. The 'Job Board Distributor Provider' section has a 'Default Job Board Distributor' dropdown and an 'Apply Online URL' text field. At the bottom, there are three buttons: 'Save', 'Notify', and 'Refresh'.

**Apply Online**

Department SetID: SHARE

Employee Self Service Deptid: 10000

Default Attachment Type: REFLT

Candidate Registration: Optional Registration

After Update Status: Applicant Pending

**3rd Party Integrations**

☐ Resume Parsing Provider

Supplier ID: [Dropdown]

Language Code: [Dropdown]

☐ Job Board Distributor Provider

Default Job Board Distributor: [Dropdown]

Apply Online URL: [Text Field]

**Buttons:** Save, Notify, Refresh

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:

**Apply Online**

Department SetID: SHARE

Employee Self Service Deptid: 10000

Default Attachment Type: REFLT

Candidate Registration: Optional Registration

After Update Status: Applicant Pending

**3rd Party Integrations**

☐ Resume Parsing Provider

Supplier ID: [Dropdown]

Language Code: [Dropdown]

☐ Job Board Distributor Provider

Default Job Board Distributor: [Dropdown]

Apply Online URL: [Text Field]

Save Notify 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.

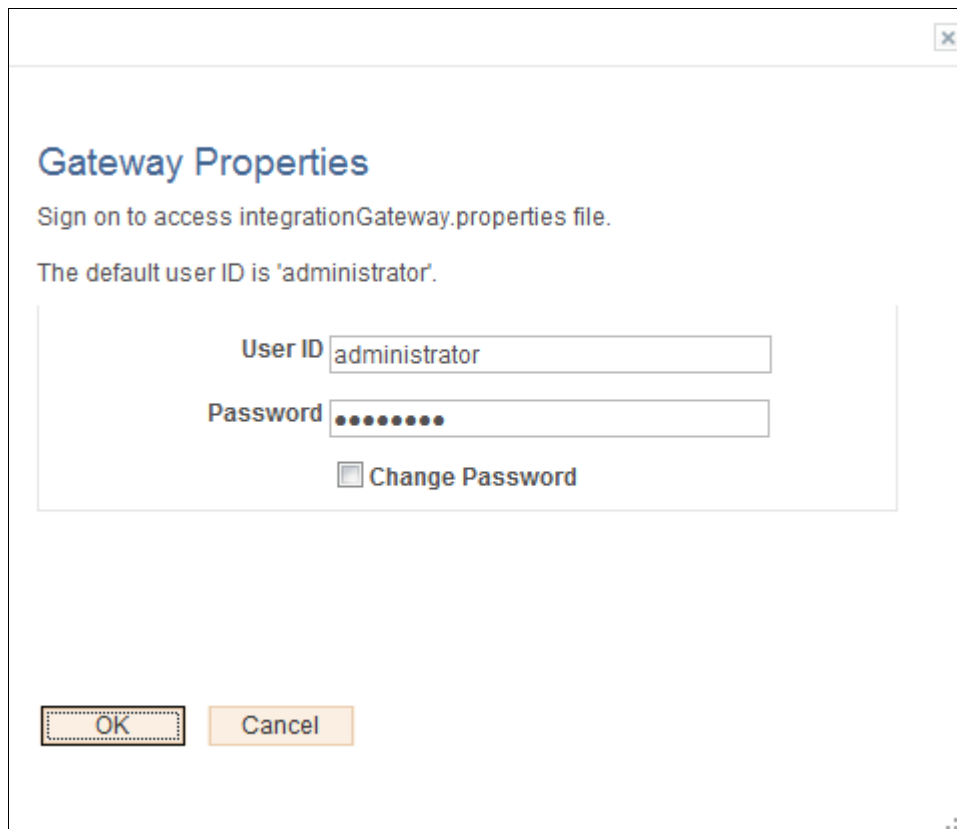
See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions to set up integration gateway.

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: <http://localhost:8000/PSIGW/PeopleSoftListeningConnector>

**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. The 'Map Name' is 'PhoneTypeDVM' and the 'Type' is 'Static'. The '\*Description' field contains 'Phone Type DVM'. Below this is a 'Comments' text area. The 'Assign Elements to Maps' section contains a table with three rows of mapped elements. The table has columns for Order, \*Element Name, \*Data Type, Length, Required, and action buttons (+/-). Below the table are buttons for 'Export' and 'Delete'. At the bottom of the form are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. The breadcrumb 'Elements | Domains' is visible at the bottom left.

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"/>	+	-

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 in the PeopleSoft 9.2 Staffing Front Office. The page is titled 'Map Name PhoneTypeDVM' and 'Type Domain Value Map (static)'. It features three main sections for assigning domains to value maps:

- Assign Domains to Value Maps:** This section includes a 'Find | View 1' button and navigation controls. It shows a table with one row: 'Domain Name' is 'HRXML' and 'Is Unique' is checked. Below this table is a section for 'Assign Elements to the Domain' with a 'Personalize | Find | View All' button and navigation controls. It shows a table with one row: 'Element Name' is 'PHONE\_TP'.
- Assign Domains to Value Maps:** This section includes a 'Find | View All' button and navigation controls. It shows a table with one row: 'Domain Name' is 'PSFT' and 'Is Unique' is checked. Below this table is a section for 'Assign Elements to the Domain' with a 'Personalize | Find | View All' button and navigation controls. It shows a table with one row: 'Element Name' is 'PHONE\_TYPE'.
- Assign Domains to Value Maps:** This section includes a 'Find | View All' button and navigation controls. It shows a table with one row: 'Domain Name' is 'UniqueGUID' and 'Is Unique' is checked. Below this table is a section for 'Assign Elements to the Domain' with a 'Personalize | Find | View All' button and navigation controls. It shows a table with one row: 'Element Name' is '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.

- 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: Contracts

Comments:

Archive: ☒ Archive ☐ Unordered

Queue Status: Run

Owner ID: Contracts

**Operations Assigned to Queue**

Service	Version
CONTRACT_REQUEST	VERSION_1
CONTRACT_RESPONSE	VERSION_1
CONTRACT_TXN	VERSION_1
CONTRACT_TXN	VERSION_2
PENDING_ACTIVITY	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 Definitions page

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

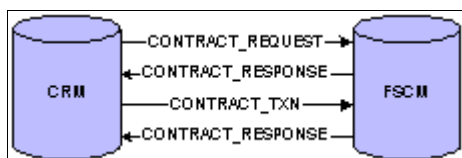
As a prerequisite, you must know which databases you are integrating. In the example of CONTRACT\_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT\_RESPONSE,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

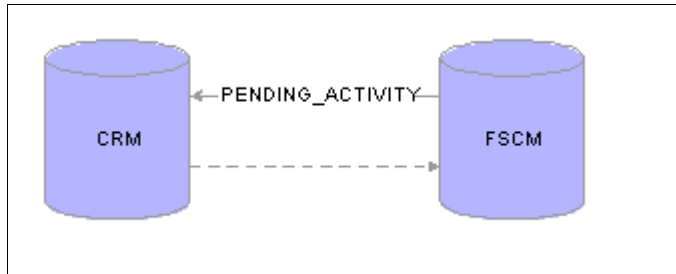
For Recurring and One-Time transactions, this message is sent only once. For On-Demand Transactions, the system sends this message for a second time, after the Contracts Billing Interface (CA\_BI\_INTFC) process completes, to provide the status of the transactions to PeopleSoft CRM.

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**

☒ Default ☒ Active

**Runtime Schema Validation**

☐ Request Message

☐ Non-Repudiation

**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.

---

The screenshot displays the 'Handlers' tab for the 'CONTRACT\_REQUEST' service operation. The page includes a table with the following data:

*Name	*Type	Sequence	*Implementation	*Status
1 ContractRequest	On Notify		Application Class	Active

Below the table, there is a 'Save' button and a 'Return to Service' link. The page also features navigation tabs for 'General', 'Handlers', and '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 shows the 'Routing Definitions' page in the PeopleSoft 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, Async) and 'CONTRACT\_REQUEST\_CR' (VERSION\_1, Async). 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 open, showing the details for 'CONTRACT\_REQUEST1'. It includes fields for 'Routing Name', 'Service Operation', 'Version', 'Description', 'Comments', 'Sender Node', 'Receiver Node', 'Operation Type', and 'Owner ID'. The 'Active' checkbox is checked, and the 'Owner ID' is set to 'Contracts'. The pop-up also has 'Save' and 'Return' buttons.

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:

General
Handlers
Routings

Service Operation
CONTRACT\_TXN

Operation Type
Asynchronous - One Way

\*Operation Description
Contract Transactions

Operation Comments

Owner ID
Contracts

Operation Alias

☐ User/Password Required

\*Req Verification
None

Service Operation Security

Default Service Operation Version

\*Version
VERSION\_2

Version Description
Contract Transactions

Version Comments

☒ Default
☒ Active

Routing Status

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

Runtime Schema Validation

☐ Request Message

☐ Non-Repudiation

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\_TXN.VERSION\_2
View Message

\*Queue Name
CONTRACT
View Queue
Add New Queue

Non-Default Versions
Personalize | Find |
First
1 of 1
Last

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

Save
Return to Service
Add Version

General | Handlers | Routings

Service Operation page: General tab

3. 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

<b>Service Operation</b>	CONTRACT_TXN	<input type="checkbox"/> Default	<input checked="" type="checkbox"/> Active
<b>Service</b>	CONTRACT_TXN		
<b>Service Operation Version</b>	VERSION_1		
<b>Operation Type</b>	Asynchronous - One Way		
<b>Description</b>	Contract Transactions		
<b>Comments</b>			

**Runtime Schema Validation**
☐ Request Message
 ☐ Non-Repudiation

**Routing Actions Upon Save**
☐ Generate Any-to-Local
 ☐ Generate Local-to-Local
 ☐ Generate Local-to-Atom

**Message Information**

<b>Type</b>	Request	
<b>Message Version</b>	CONTRACT_TXN.VERSION_1	<a href="#">View Message</a>
<b>*Queue Name</b>	CONTRACT	<a href="#">View Queue</a> <a href="#">Add New Queue</a>

**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 [View](#)

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

Service Operation Version page

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

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

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 fields. The 'Server Name' field is set to 'PSNT', and the 'Process Groups' field is set to 'WMALL'. The page includes sections for 'On File Creation', 'System Recovery Process', and 'Process Security'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

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 'Component' (WM\_MSP\_IMPORT). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A breadcrumb trail at the very bottom lists various configuration options.

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

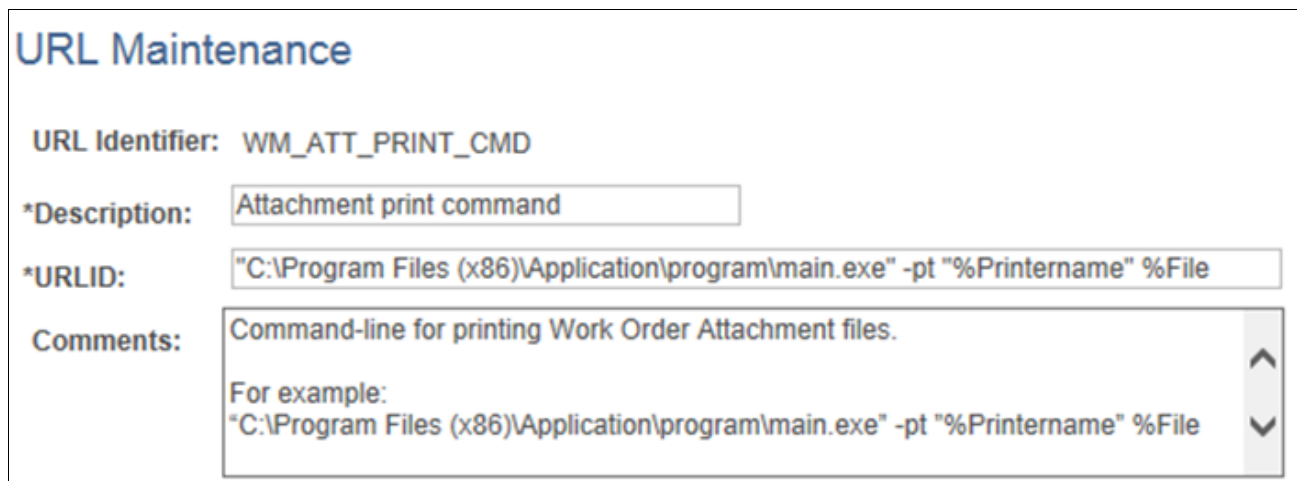
After you install the additional component application, you must update the URL that is used by the PeopleSoft Work Order Attachment Print feature to call the additional component application to print attachments.

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

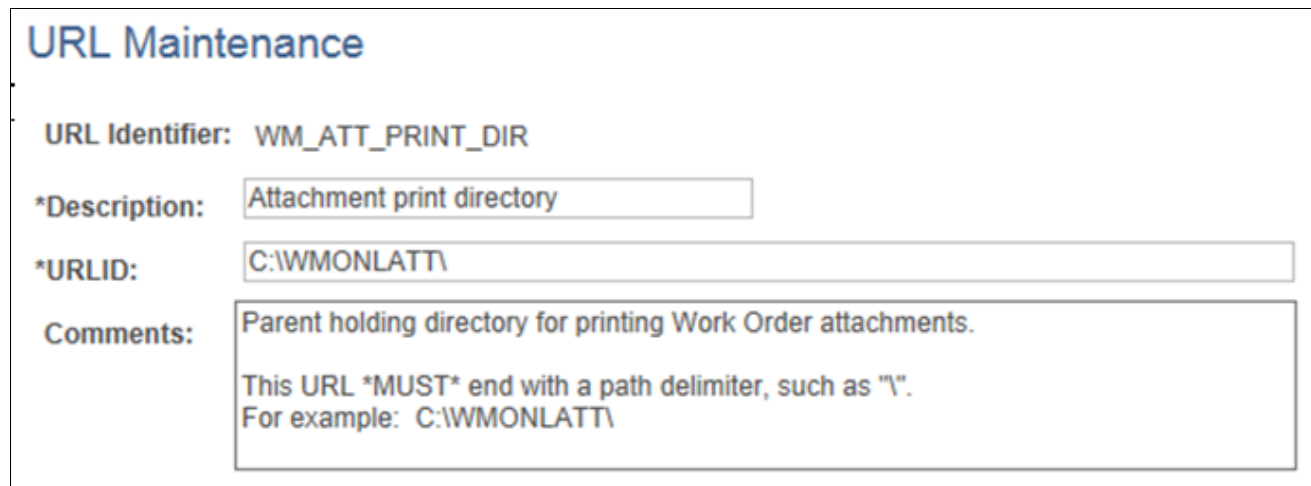
While printing Work Order Attachments, the PeopleSoft Work Order Attachment Print process temporarily downloads the attachments to the server in a holding directory, where they can then be passed on to the additional component application for printing. The URL WM\_ATT\_PRINT\_DIR determines the directory 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. It has a title 'URL Maintenance' in blue. Below it, there are four fields: 'URL Identifier:' with the value 'WM\_ATT\_PRINT\_DIR', '\*Description:' with the value 'Attachment print directory', '\*URLID:' with the value 'C:\WMONLATT\'', and 'Comments:' with 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 arranged in a form-like structure with labels on the left and input areas on the right.

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.

---

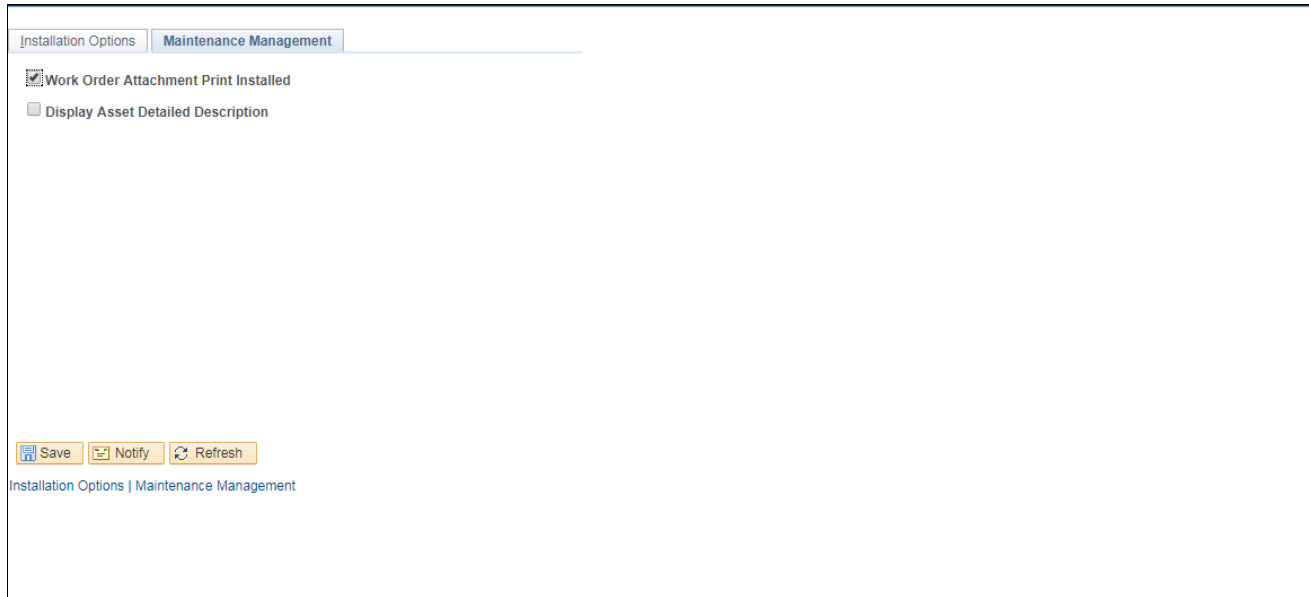
## Task 16-2: Enabling the PeopleSoft Work Order Attachment Print Features

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 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:

The screenshot shows the 'Node Definitions' page for the node 'PSFT\_XINBND'. The page is divided into several sections. At the top, there are tabs: 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Node Definitions' tab is selected. Below the tabs, there are several input fields and checkboxes. The 'Node Name' field is 'PSFT\_XINBND'. The '\*Description' field is 'External Inbound node'. The '\*Node Type' dropdown is set to 'External'. The '\*Authentication Option' dropdown is set to 'None'. To the right of these fields are three checkboxes: 'Default Local Node' (unchecked), 'Local Node' (unchecked), and 'Active Node' (checked). Below these are two more checkboxes: 'Non-Repudiation' (unchecked) and 'Segment Aware' (unchecked). To the right of the 'Active Node' checkbox are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the 'Authentication Option' field is the '\*Default User ID' field, which contains 'VP1'. Below this are several other input fields: 'WSIL URL', 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', 'Codeset Group Name', 'External User ID', 'External Password', 'Confirm External Password', and 'External Version'. At the bottom left is a 'Save' button. At the bottom center is a 'Return to Search' button. At the bottom right are two links: 'Contact/Notes' and 'Properties'. At the very bottom, there is a navigation bar with links: '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:

The screenshot displays the 'Node Definitions' page for an anonymous node. The page is organized into several sections:

- Node Information:** Node Name (ANONYMOUS), \*Description (Used internally by IB system.), \*Node Type (External), \*Authentication Option (None).
- Node Properties:** \*Default User ID (VP1), 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.
- Node Settings:** Default Local Node, Local Node, Active Node, Non-Repudiation, Segment Aware.
- Actions:** Copy Node, Rename Node, Delete Node, Save.
- Navigation:** 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, showing the following fields:

- 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)
- \*Req Verification:** None
- User/Password Required:** (checkbox, unchecked)
- Service Operation Security:** (link)

Below these fields is the 'Default Service Operation Version' section, which includes:

- \*Version:** v1
- Version Description:** AM Physical Inventory Request
- Version Comments:** (empty)
- Default:** (checkbox, checked)
- Active:** (checkbox, checked)

There are two side-by-side sections below the version details:

- Runtime Schema Validation:**
  - Request Message:** (checkbox, unchecked)
  - Non-Repudiation:** (checkbox, unchecked)
- Routing Status:**

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

Below these is the 'Routing Actions Upon Save' section:

- Generate Any-to-Local:** (checkbox, unchecked)
- Generate Local-to-Local:** (checkbox, unchecked)

At the bottom is the 'Message Information' section:

- Type:** Request
- Message.Version:** GET\_PIDATA.VERSION\_1
- \*Queue Name:** ASSET\_MANAGEMENT
- View Message:** (link)
- View Queue:** (link)
- Add New Queue:** (link)

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:

The screenshot displays the 'Service Operations - General' page for the service operation *GET\_PIDATA\_ACK*. The page is organized into several sections:

- General Information:**
  - 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:** (empty field)
  - User/Password Required:** ☐
  - \*Req Verification:** None
  - Service Operation Security:** (link)
- 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 [View Message](#)
  - \*Queue Name:** ASSET\_MANAGEMENT [View Queue](#) [Add New Queue](#)

At the bottom of the page, there are buttons for **Save**, **Return to Service**, and **Add Version**. The breadcrumb trail at the bottom left reads: [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	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	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				

Save

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"/>				

Add Field

Return to Search Notify

Add Update/Display

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 two tabs: 'Contact/Notes' and 'Properties'. At the bottom left, there is a 'Save' button and a 'Return to Search' button. The bottom of the page features 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*.

- 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 shows the 'Node Definitions' page for the 'ANONYMOUS' node. The page has a tabbed interface with 'Node Definitions' selected. The 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 fields, there are two tabs: 'Contact/Notes' and 'Properties'. At the bottom left, there is 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 ANONYMOUS

- Click Save.

## Task 18-2: Activating Service Operations

To activate service operations:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
- 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 the service operation **PROCESS\_DISCOVERYDATA**. The page is organized into several sections:

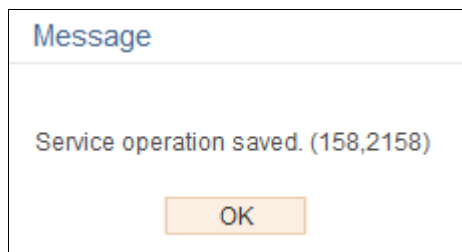
- Service Operation Details:**
  - Service Operation:** PROCESS\_DISCOVERYDATA
  - Operation Type:** Asynchronous - One Way
  - \*Operation Description:** ITAM Process Discovery Data
  - Operation Comments:** ITAM integration of Discovery Data.
  - Owner ID:** Asset Management
  - Operation Alias:**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

At the bottom of the page, there are three buttons: **Save**, **Return to Service**, and **Add Version**. The **Active** checkbox is checked, indicating the service operation is active.

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:

General | **Handlers** | Routings

Service Operation PROCESS\_DISCOVERYDATA

Default Version v1

Operation Type Asynchronous - One Way

*Name	*Type	Sequence	*Implementation	*Status
1 IT_INTEGRATIONS	On Notify		Application Class	Active

Save Return to Service

General | Handlers | Routings

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

# Configuring eMail URLs in PeopleSoft SCM Applications

This chapter discusses:

- Configuring eMail URLs
- Setting Up Pagelets
- Granting Access to Navigation Pages

## Task 19-1: 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 19-1-1: 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 19-1-2: 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 controls:

- URL Identifier:** EMP\_SERVLET
- \*Description:** Employee portal servlet
- \*URLID:** http://webserver/psp/empportal
- Comments:** Example: http://servername/psp/employeeportaldomain/
- URL Properties** (link)
- 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 19-1-3: 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: EB\_SERVLET

\*Description:

\*URLID:

Comments:

[URL Properties](#)

URL Maintenance page for EB\_SERVLET

- Click Save.

## Task 19-2: Setting Up Pagelets

This section discusses:

- Accessing Pagelets
- Enabling Pagelet Creation and Access with Portal Utilities

### Task 19-2-1: 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 19-2-2: 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 19-3: 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 20

# 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 20-1: Granting Security in PeopleSoft Fluid Requisition**

---

### **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 20-1-1: 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 20-1-2: 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	Edit		
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_View/tmImageFullSize	Full Access ▼	View
PV_ITM_IMAGE_VIEW.FieldFormula.IScript_View/tmImageFullSize2	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 1-4 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 1-4 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 20-1-3: 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 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 shows 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 'User Roles' table lists the following roles:

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

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'. The navigation bar at the bottom shows 'General | ID | Roles | Workflow | Audit | Links | User ID Queries'.

User Profiles page: Roles tab

## Task 20-1-4: 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

☒ ☐ ☐ ☒ ☒

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>

OKCancel

Select AllDeselect 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 20-2: 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 20-2-1: 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.

---

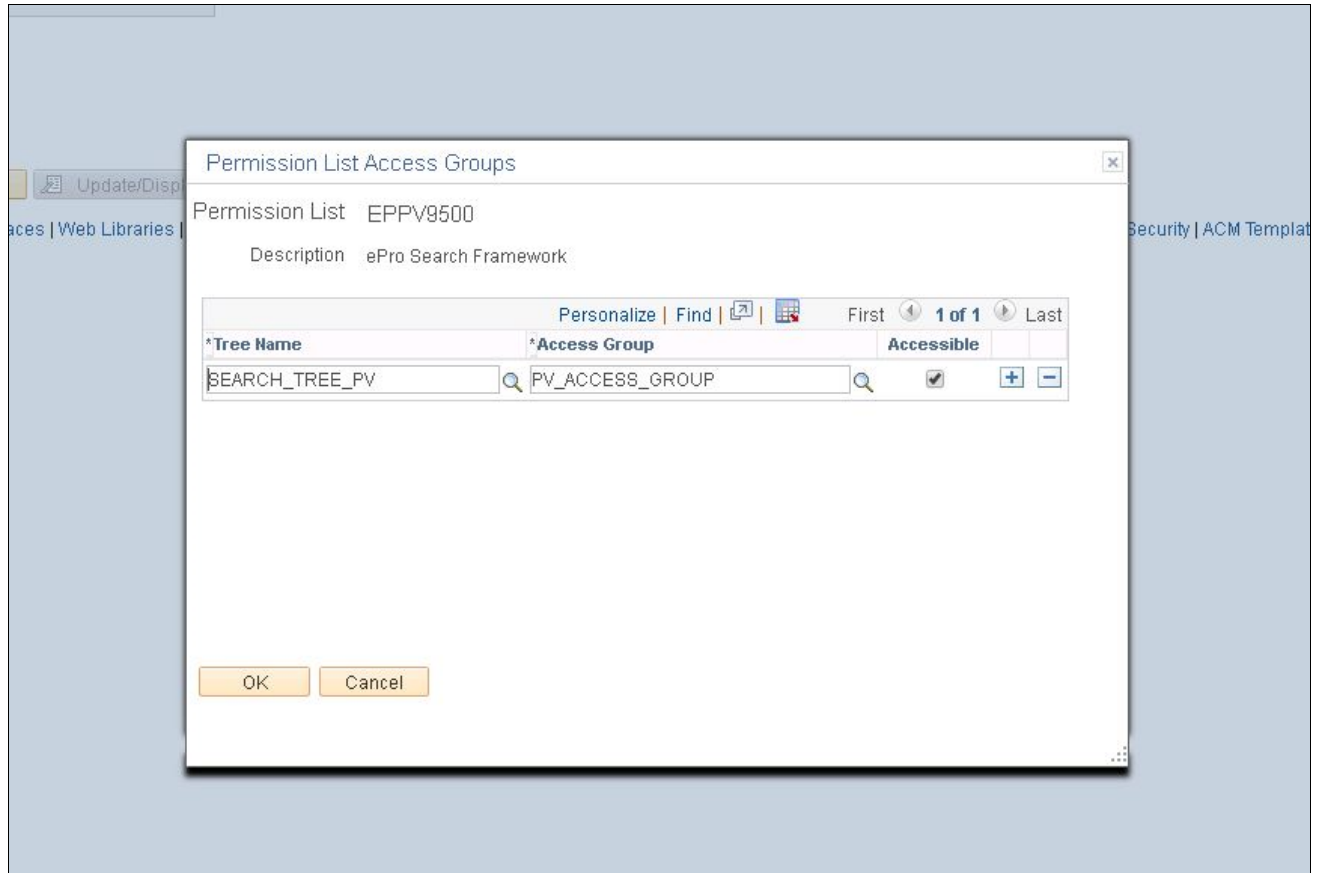
Before indexing the search definitions, verify that the user has been assigned to the Permission List EPPV9500.

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.

5. 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 Elastic Search indexing.

---

To index the eProcurement search definitions:

1. Select PeopleTools, Search Framework, Administration, Schedule Search Index.
2. Create a new run control ID.
3. Select Search Definition *EP\_PV\_MASTERITEMVENDOR\_SD*.
4. Select Full Index as the type of index, for the initial run.
5. Select Base Language as the language option. If multi-language for database is enabled, then select All Languages to index multiple languages.
6. Click Run to start the process.
7. On the Process Scheduler Request page, click OK.
8. 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 as Search Engine, 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 shows the 'eProcurement Installation Options' page. At the top, there are links for 'New Window' and 'Personalize Page'. The page is divided into several sections:

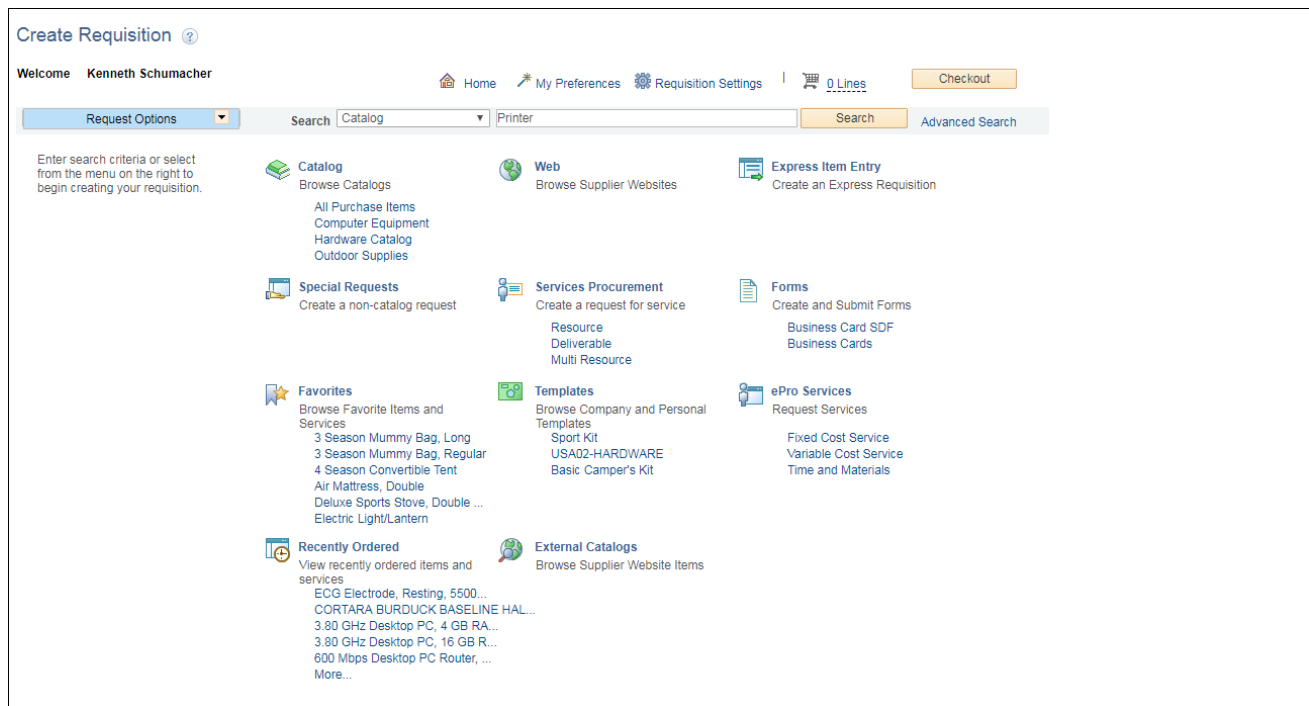
- eProcurement Installation Options:** Includes a dropdown for '\*sProcurement Installation Option' set to 'eProcurement with sProcurement', a checkbox for 'eProcurement Connect', and a link for 'Fluid Installation Settings'.
- Item Catalog Options:** Includes a dropdown for '\*Item Source Option' set to 'Master Items Only' and a checkbox for 'Catalog Management as eProcurement Item Source'.
- Requisition Catalog Search:** Includes a dropdown for '\*Catalog Search Type' set to 'Search Engine', a link for 'Search Settings', a checkbox for 'Non Dynamic Range', a checkbox for 'Override Existing Categories with Item Ranges', a checkbox for 'Allow Transparent Punchout Items', a checkbox for 'Consolidate Marketplace Items in Search Results and Facets', and a link for 'Customize Search Results'. Below these is a 'BU Catalog Control' field set to 'N' and a message: 'You have selected to use the Search Engine to do the item catalog search for a requisition. Search Engine indexing needs to be run in order to populate the Search repository.'
- Requisition Display Options:** Includes two checkboxes: 'Suppress trailing zeros for Quantity field' and 'Suppress trailing zeros up to the currency decimal position for Price field'.

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 20-2-2: 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

# Applying Common Installation Instructions

## **Task A-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

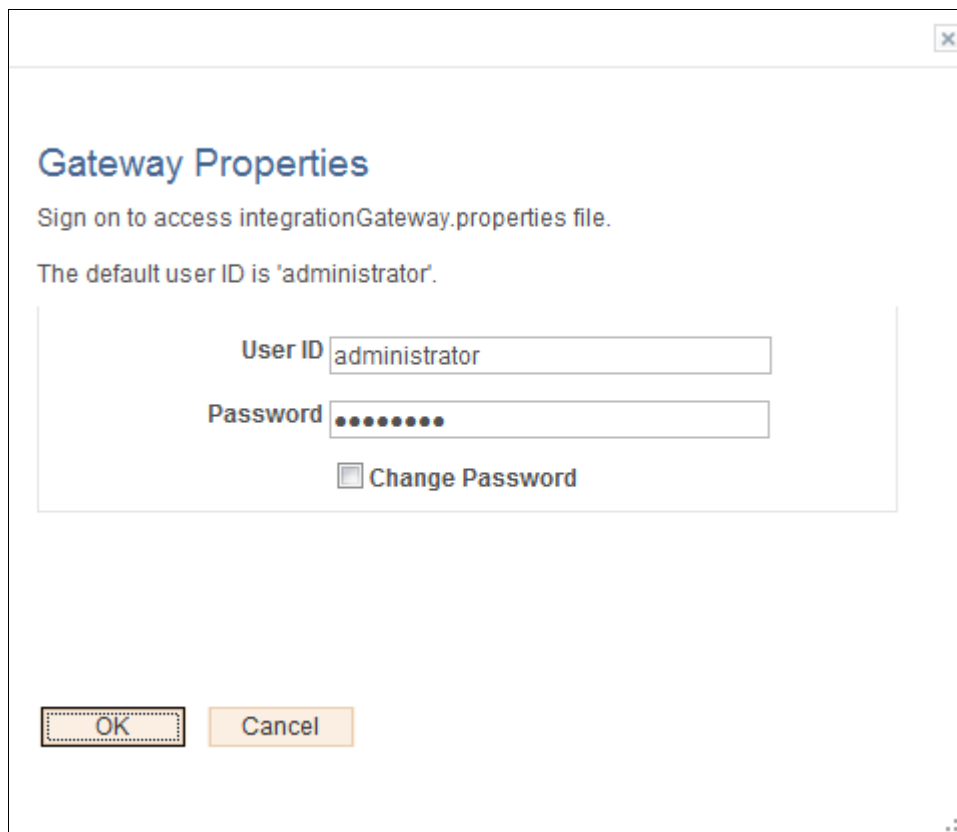
Connectors			Personalize	Find	First	1-14 of 14	Last
*Connector ID	Description	*Connector Class Name					
1 APNS_TARGETCONNEC		APNTargetConnector	Properties	+	-		
2 AS2TARGET		AS2TargetConnector	Properties	+	-		
3 EXAMPLETARGETCONNI		ExampleTargetConnector	Properties	+	-		
4 FILEOUTPUT		SimpleFileTargetConnector	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.

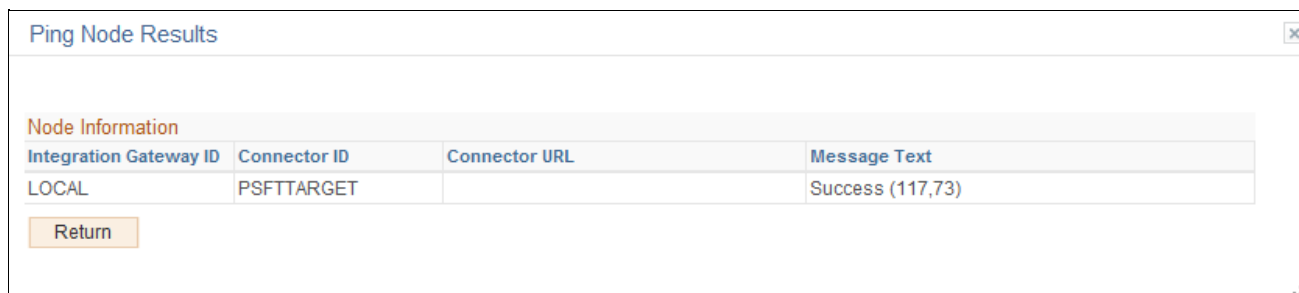
## 11. In the Tools Release field, enter the PeopleSoft PeopleTools release number.

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 A-2: Activating the Domain

---

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**

**Domain Criteria**

Grace Period for all Domains (Minutes)

**Purge Domain Status** ☐ All Domains Active ☐ All Domains Inactive **Failover Disabled**

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

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

Failover Group	Failover Priority	Machine Name	Application Server Path	Domain Status	Grace Period	Slave Indicator	
		<Machine Name>	<Application Server Path>	Active			<a href="#">View Domain Queue Sets</a>

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

Machine Name	Dispatcher Name	Application Server Path	Status String	Date/Time Stamp

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 A-3: Setting Up Message Node Definitions

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

**Note.** PSFT\_HR is the default local node in HR environment and PSFT\_EP in FSCM. For single sign on to work, same password must be used on nodes in both the environments.

PSFT\_EP exists in HCM and PSFT\_HR exists in FSCM which needs to be configured for single sign on to work

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:

**Note.** The below screenshot is from FSCM environment. For HCM environment, follow the same configuration steps using node name as PSFT\_HR.

The screenshot displays the 'Node Definitions' page for a node named 'PSFT\_EP'. The page is organized into several sections:

- Node Information:** Includes fields for 'Node Name' (PSFT\_EP), '\*Description' (Financials/Supply Chain), 'Node Type' (PIA), and '\*Authentication Option' (Password).
- Node Properties:** Includes checkboxes for 'Default Local Node', 'Local Node', 'Active Node', 'Non-Repudiation', and 'Segment Aware'.
- Node Security:** Includes fields for 'Node Password', 'CheckTokenID', '\*Default User ID' (VP1), 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', and 'Codeset Group Name'.
- Actions:** Includes buttons for 'Copy Node', 'Rename Node', 'Create CheckTokenID', 'Save', and 'Return to Search'.
- Navigation:** Includes tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and '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 the Create CheckTokenID button to generate CheckTokenID and note down the ID.
- Click Save, then click the Return to Search button.

8. On the Nodes search page, search for and select the node name. For FSCM search for *PSFT\_HR* and for HCM search for *PSFT\_EP*. Below screenshot is from FSCM environment (replace with *PSFT\_EP* in HCM environment).

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 has a top navigation bar with tabs: 'Node Definitions' (selected), 'Connectors', 'Portal', 'WS Security', and 'Routings'. On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. The main form contains the following fields and options:

- Node Name:** PSFT\_HR
- \*Description:** PS HCM - Human Captical Mgt
- \*Node Type:** PIA (dropdown menu)
- \*Authentication Option:** Password (dropdown menu)
- Default Local Node:** ☐
- Local Node:** ☐
- Active Node:** ☒
- Non-Repudiation:** ☐
- Segment Aware:** ☐
- Node Password:** [Masked field]
- CheckTokenID:** [Masked field]
- \*Default User ID:** VP1 (with search icon)
- Hub Node:** [Empty field with search icon]
- Master Node:** [Empty field with search icon]
- Company ID:** [Empty field]
- IB Throttle Threshold:** [Empty field]
- Image Name:** [Empty field with search icon]
- Codeset Group Name:** [Empty field with search icon]

At the bottom of the form, there are two links: 'Contact/Notes' and 'Properties'. Below these links is a 'Save' button. At the very bottom, there is a 'Return to Search' button with a magnifying glass icon. The footer of the page shows the navigation tabs again: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions for HCM - PSFT\_HR node

9. On the Node Definitions page, in the Authentication Option drop-down list box, select *Password*.
10. In the Password field, enter a password.
11. In the Confirm Password field, re-enter the password.
12. Enter CheckTokenID. Copy ID generated in step 6 for PSFT\_HR and PSFT\_EP from HCM and FSCM respectively.
13. Click Save.

## Task A-4: Setting Up Portal Nodes

This section discusses:

- Understanding Portal Node Set Up
- Setting Up Portal Nodes in PeopleSoft FSCM/HCM

## **Task A-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 A-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 configuration for a node named 'ERP'. The interface includes a breadcrumb trail at the top: 'Node Definitions | Connectors | Portal | WS Security | Routings'. Below this, the 'Node Name' is 'ERP'. A 'Details' section is highlighted. The configuration fields are as follows:

- Description:** Portal Node - ERP
- Default Portal:** EMPLOYEE (selected from a dropdown)
- 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 left, there are two buttons: 'Save' and 'Return to Search'. A breadcrumb trail at the 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

Tools Release

Application Release

Content URI Text

Portal URI Text

☐ Portal Host Node

Network Node Name

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.

