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# PeopleSoft Human Capital Management 9.2 (through Update Image 30) Installation

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**April 2019**

PeopleSoft Human Capital Management 9.2 (through Update Image 30)

## 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) supplier, the network administration documentation provided by your network supplier, or the installation and configuration documentation for additional software components that are used with PeopleSoft products.

Required updates to this installation documentation are provided in the form of "Required for Install" incidents, 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 Human Capital Management (HCM), you need both the PeopleSoft PeopleTools installation and the additional instructions provided for installing PeopleSoft HCM.

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 conventions described in the following table 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® 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 Interaction Hub
- Oracle's PeopleSoft Staffing Front Office
- Oracle's PeopleSoft Supply Chain Management

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

## Related Information

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

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

To install additional component software products for use with PeopleSoft products, including those products that are packaged with your PeopleSoft products, you should refer to the documentation provided with those products, as well as this documentation.

## Comments and Suggestions

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Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleSoft 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.



# Installing PeopleSoft HCM 9.2 Applications

This chapter discusses:

- Preparing for the Installation
- Updating the Installation Table
- Installing PeopleSoft HCM for Federal Government
- Installing PeopleSoft HCM for Education and Government
- Installing PeopleSoft HCM for the Military
- Setting Up PeopleSoft HCM for Japan
- Setting Up PeopleSoft HR for Switzerland
- Creating Time Zone Offsets for PeopleSoft Time and Labor
- Installing Absence Management and Global Payroll Core
- Granting Access to Homepage Personalization
- Installing PeopleSoft Global Payroll Country Extensions
- Installing PeopleSoft ePay Payslips for PeopleSoft Global Payroll
- Installing PeopleSoft Global Payroll PDF Form Files
- Installing Directory Interface
- Installing PeopleSoft PayBill Management
- Installing Service Handlers
- Configuring Global Search
- Installing Configurable Matrices and Metadata
- Installing PeopleSoft Human Resources for French Public Sector
- Verifying Desktop Integration is Enabled

## **Preparing for the Installation**

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This section discusses:

- Verifying the PeopleSoft PeopleTools Version
- Verifying the Authentication Domain Configuration Setup
- Verifying the Demo Database Size
- Installing PeopleSoft PeopleTools and PeopleSoft Application Software
- Running the HCINSSYS.DMS Script
- Verifying the EDM Pool Size for DB2 z/OS

- Modifying the PeopleSoft PeopleTools Install for DB2 z/OS
- Using the Fluid User Interface

## Verifying the PeopleSoft PeopleTools Version

To run PeopleSoft HCM 9.2 Image 30, you must be using PeopleSoft PeopleTools 8.57.05.

## Verifying the Authentication Domain Configuration Setup

Authentication Domain Configuration is required in order to enable related actions in various products in PeopleSoft HCM.

To set up Authentication Domain Configuration, see the PeopleSoft PeopleTools product documentation.

See *PeopleTools: Portal Technology*, "Understanding the PeopleSoft Related Content Framework."

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**Note.** The Demo (DMO) version that is shipped to customers does not have this Authentication Domain setup configured by default.

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## Verifying the Demo Database Size

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

RDBMS Platform	Approximate Database Size
Oracle — ANSI	31 GB
Oracle — Unicode	31 GB
DB2 UNIX— ANSI	50 GB
DB2 UNIX — Unicode	60 GB
DB2 z/OS — EBCDIC	44 GB
DB2 z/OS — Unicode	36 GB
Microsoft SQL Server — ANSI	14 GB
Microsoft SQL Server — Unicode	17 GB

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**Note.** You may need to edit this Demo database size for some operating system platforms, based on the default page size.

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## Installing PeopleSoft PeopleTools and PeopleSoft Application Software

PeopleSoft applications built on PeopleTools 8.57 are delivered as deployment packages (DPKs), which include the installation files for both the PeopleSoft 9.2 application and PeopleSoft PeopleTools 8.57.

For information on obtaining and installing PeopleSoft applications,

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

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 8.57 Home Page, My Oracle Support, Doc ID 2433119.2.

## Running the HCINSSYS.DMS Script

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

## Verifying the EDM Pool Size for DB2 z/OS

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

## Modifying the PeopleSoft PeopleTools Install for DB2 z/OS

This section discusses:

- Modifying the Steps to Import Data
- Modifying the Steps to Create Views

### Modifying the Steps to Import Data

For DB2 z/OS, when installing PeopleSoft HCM 9.2, the order of steps that you perform in the chapter "Creating a Database" of the PeopleSoft PeopleTools installation guide changes if you are installing a Demo (DMO) database.

See Application PeopleTools Installation document for DB2 z/OS, "Creating a Database."

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

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

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To edit the <DBNAME>dbo.dms script:

1. In <DBNAME>dbo.dms, search for the keyword `hcengl . log`.
2. Cut the portion of the script from the line that contains `hcengl . log` to the end of the script and paste it into a different script called <DBNAME>dbo\_2.dms.
3. Save the original <DBNAME>dbo.dms script after removing the portion of script from the line that has the keyword `hcengl . log` to the end of the script.
4. Verify that the original <DBNAME>dbo.dms script only contains the import from `hcengs.db` and that

<DBNAME>dbo\_2.dms contains the rest of the import and updates.

5. Run the <DBNAME>dbo.dms script in bootstrap mode.

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

See Application PeopleTools Installation document for DB2 z/OS, "Creating a Database."

6. Use the instructions in the task Creating Indexes to run the step to create indexes.
7. Use the instructions in the task Running PeopleSoft Data Mover Import Scripts to run the <DBNAME>dbo\_2.dms script.

## Modifying the Steps to Create Views

DB2 z/OS customers must modify the steps for creating views in the chapter "Creating a Database" in the PeopleSoft PeopleTools installation guide, when installing PeopleSoft HCM 9.2.

See Application PeopleTools Installation document for DB2 z/OS, "Creating a Database."

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**Note.** This modification is required due to the use of Materialized Query Tables. The associated records are defined in Application Designer as SQL Views and are distinguished from other views by the selection of the Materialized Query Tables checkbox on the Record Type tab. When such records are built in the database, instead of creating views, physical tables are created. Before creating these tables, you must specify a valid database and tablespace for each such record.

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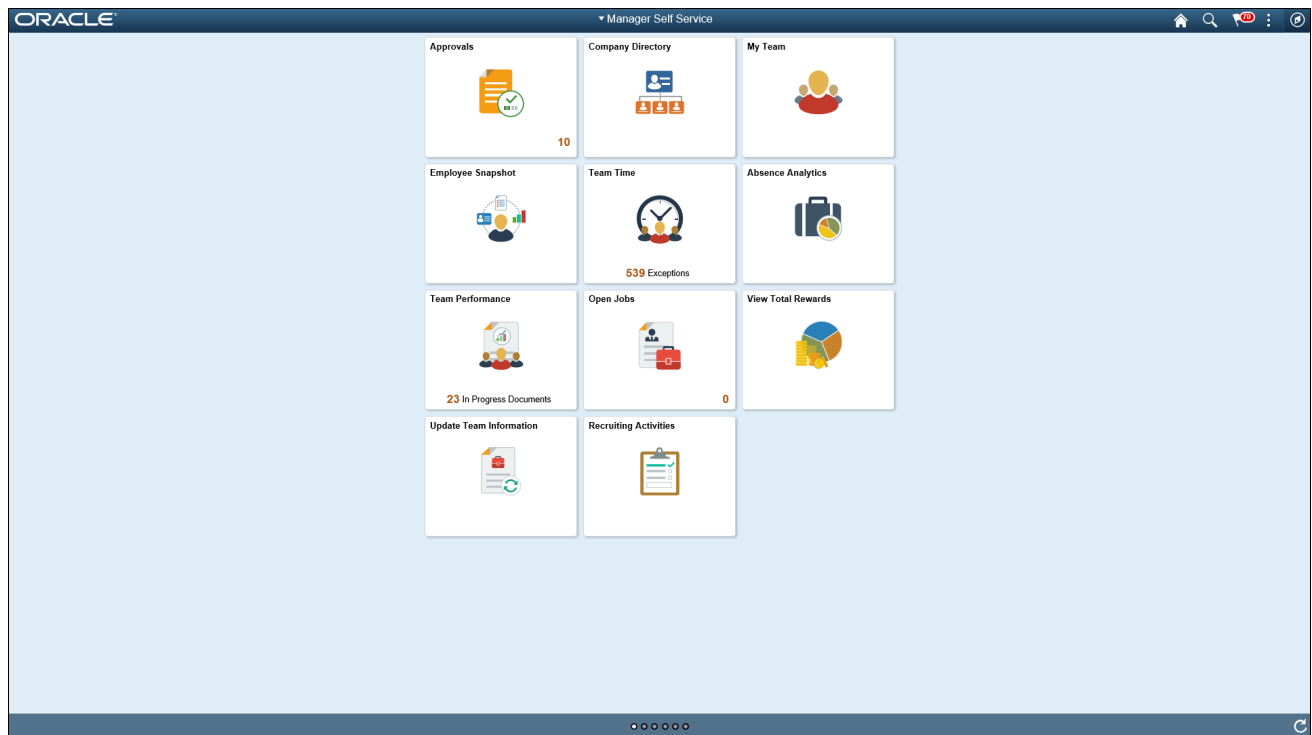
In the task Creating PeopleSoft Views, you are given the option of creating views using Data Mover or Application Designer. You must follow the "Creating Views in Application Designer" procedure, with the following modifications:

1. In the Build Execute Options, select "Build script file."
2. Review the resulting DDL script. You will find a CREATE TABLE statement for each Materialized Query Table.
3. For each CREATE TABLE statement, edit the database and tablespace names as needed.

## Using the Fluid User Interface

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

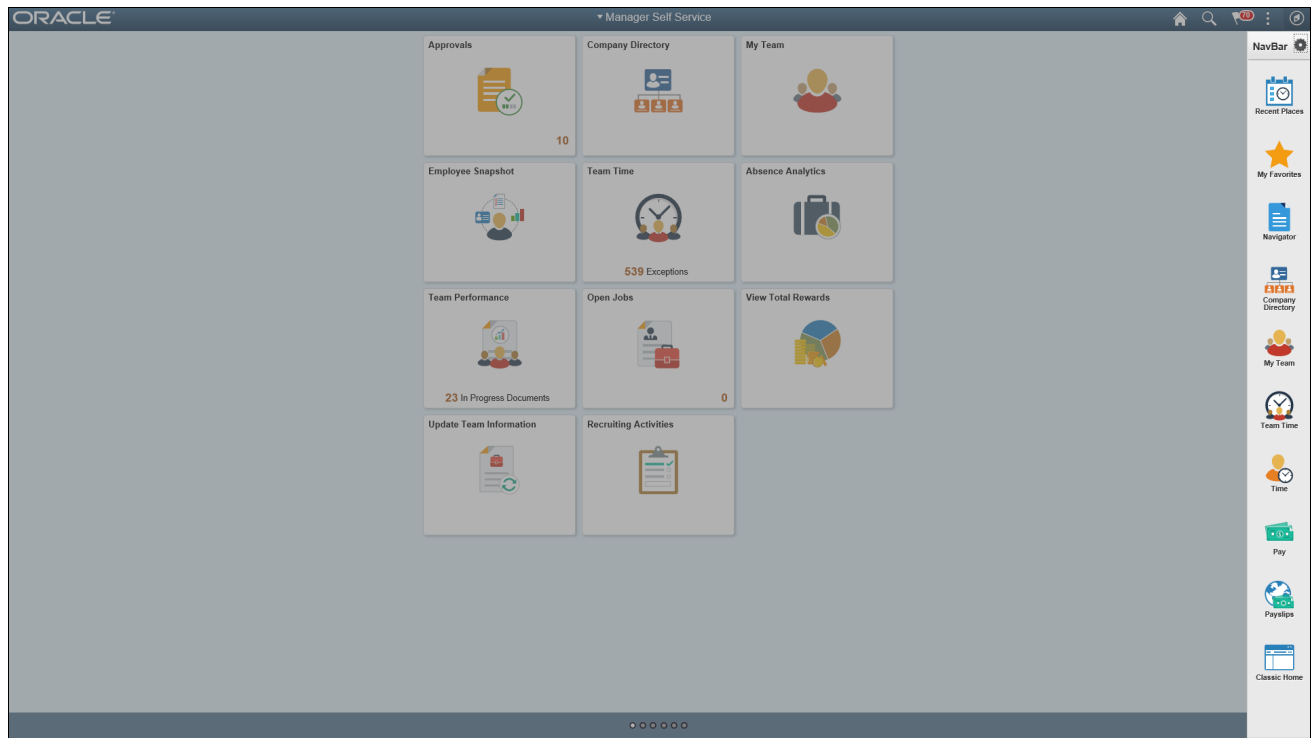
1. On the PeopleSoft Fluid User Interface, shown in this example, select (press) the NavBar button at the top right, which looks like a compass.



PeopleSoft Fluid User Interface home page

The Navigation bar (NavBar) side page appears.

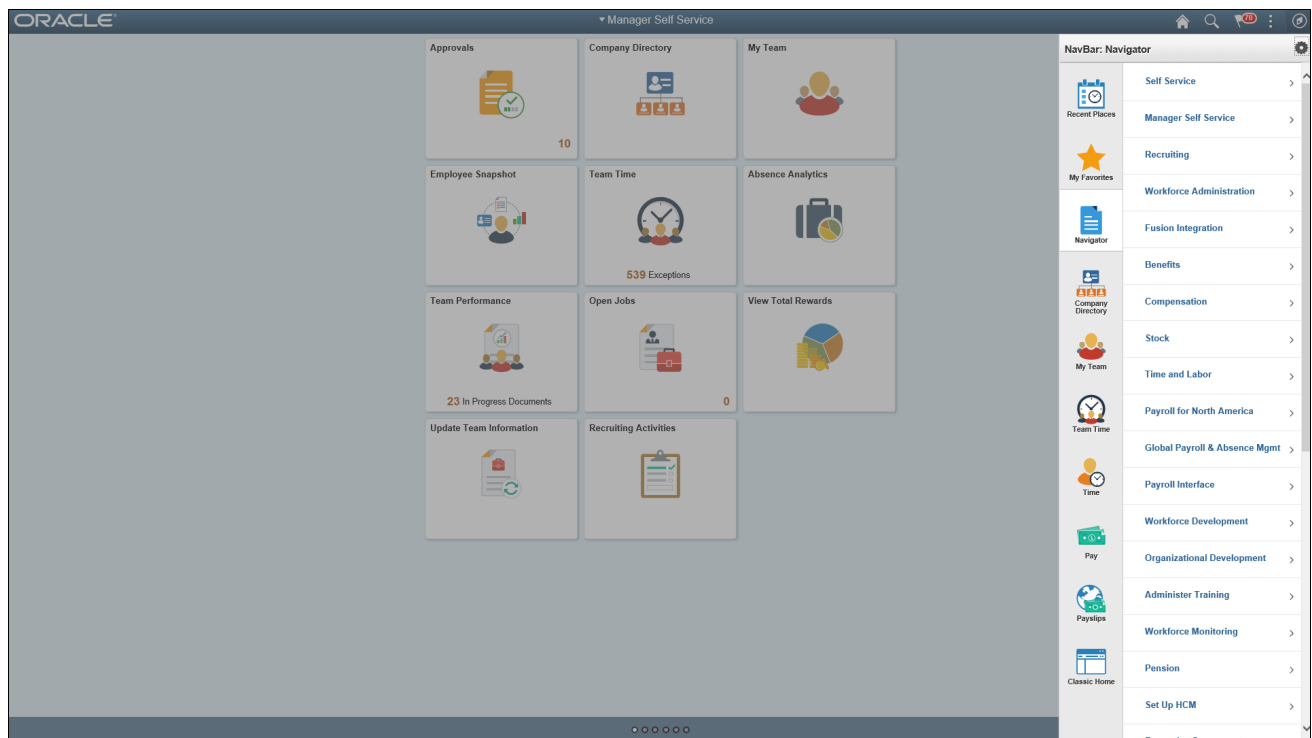
2. Select (press) Navigator.



NavBar side page

The menu structure appears.

3. Navigate to the desired item, such as Set Up HCM 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*

## Task 1-1: Updating the Installation Table

After you create the database and install PeopleSoft Pure Internet Architecture, you must complete this step to ensure that only the products for which you are licensed are active in the installation.

To update the installation table:

1. Sign on to the PeopleSoft Pure Internet Architecture in a browser.
2. Select Set Up HCM, Install, Installation Table.
3. Deselect the check boxes for the products that you are not entitled to use.

## Task 1-2: Installing PeopleSoft HCM for Federal Government

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

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

To install Federal functionality in a PeopleSoft HCM database:

1. Select Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Data Federalization.
2. Click the Federalize System Data button, to load the contents of the core tables that contain the Federal Data.

When you run the Federalization process, you introduce changes to the Installation Table. The following example shows the informational message that appears "The database was federalized at 2019-03-18-00.24.29.000000. You must restart the application server for certain values to take effect."

**Data Federalization Process**

**Set Federal Data**  
The database was federalized at 2019-03-18-00.24.29.000000. You must restart the application server for certain values to take effect.

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

**Data Tables**

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

Data Federalization Process Page

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

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

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

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

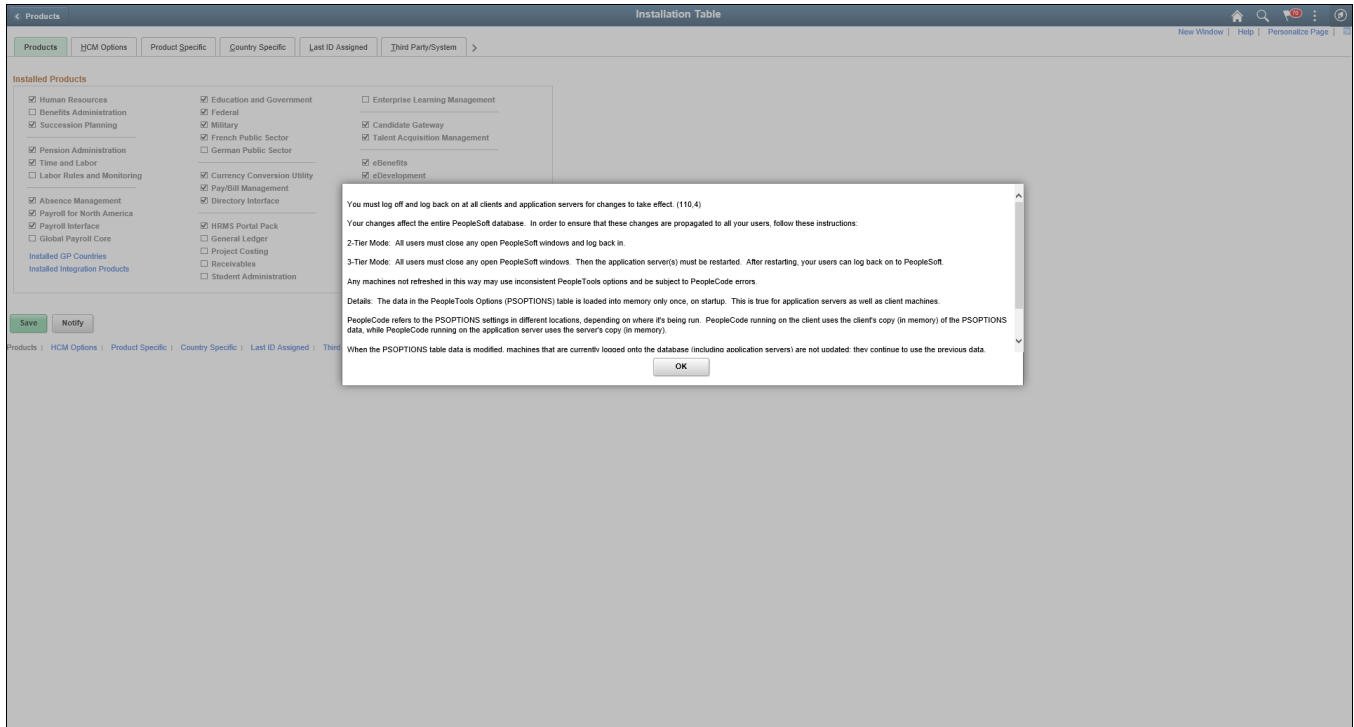
## Task 1-3: Installing PeopleSoft HCM for Education and Government

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

To enable access to specific Education and Government functionality:



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



Informational Message

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

## Task 1-4: Installing PeopleSoft HCM for the Military

This section discusses:

- Selecting the Military Option in the Installation Table
- Setting Up the Military Search Dialogs

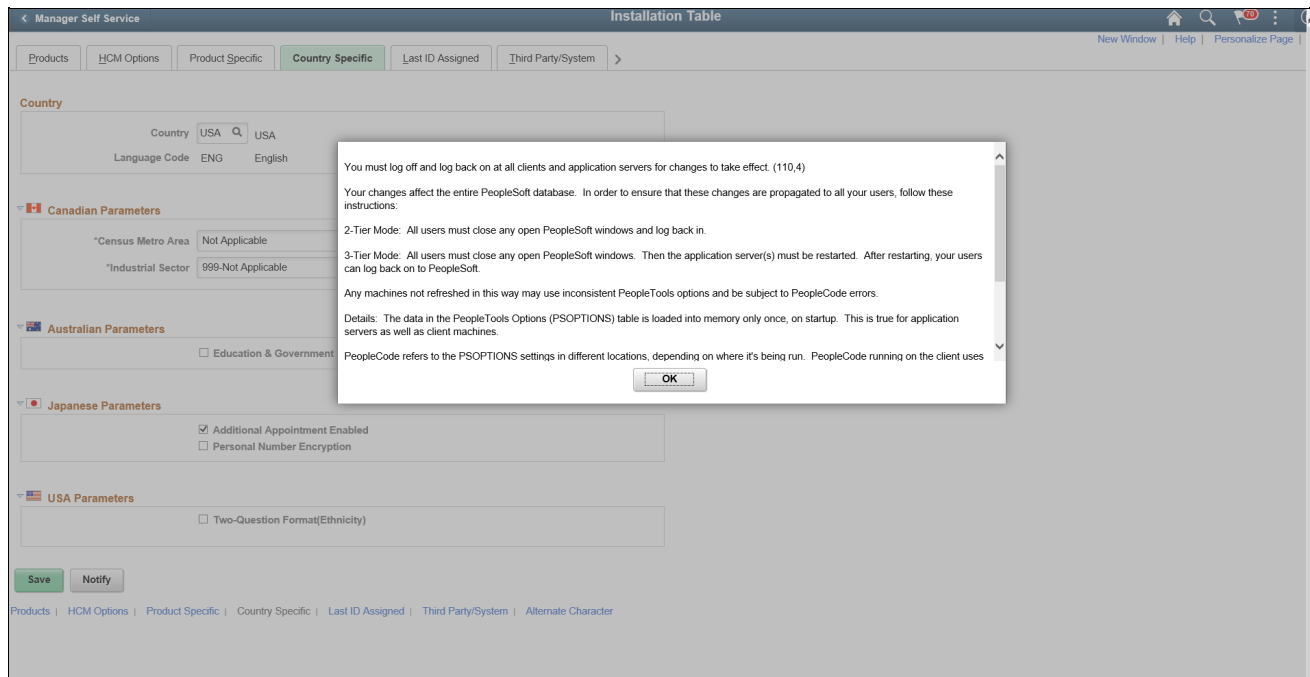
### Task 1-4-1: Selecting the Military Option in the Installation Table

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

To enable specific Military Rank processing functionality:

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

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



Informational Message

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

## Task 1-4-2: Setting Up the Military Search Dialogs

To ensure that the Military-specific fields appear in the Search Dialogs, perform these steps:

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

The List Box Item check box is automatically selected.

3. Click Save.

## Task 1-5: Setting Up PeopleSoft HCM for Japan

This section discusses:

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

## Task 1-5-1: Searching by Internal Employee ID

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

1. Sign in to PeopleSoft Application Designer.
2. Access and open the subrecord SCRTY\_FLD\_SBR.
3. Double-click the OTHER\_ID\_JPN field.
4. Select the Alternate Search key check box.
5. Click OK.
6. Click Save.

## Task 1-5-2: Configuring Phone and FAX Number Fields

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

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

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

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

1. In PeopleSoft Application Designer, open the following fields:
  - FAX
  - HOME\_PHONE
  - PHONE
  - PHONE1
  - PHONE2
  - POSITION\_PHONE
  - PROXY\_PHONE
  - WORK\_PHONE
2. For each field in the Field Format group box, change the Format Type drop-down list from *Custom* to *Uppercase*.
3. Click Save.

## Task 1-5-3: Printing Japanese Characters on SQR Reports

To print Japanese characters on SQR reports:

1. Open `<PS_APP_HOME>\sqr\setenv.sqc` for editing.
2. In `setenv.sqc`, remove the comment character from (uncomment) the second line:
 

```
! Print Specific Language
```

```
!#define PRINT_JAPANESE
```

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

To determine any additional changes, see the product documentation on global reporting.

See *PeopleTools: Global Technology*.

## Task 1-6: Setting Up PeopleSoft HR for Switzerland

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This section details how to install Swiss address validation.

To import Swiss address data:

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

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

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

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

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## Task 1-7: Creating Time Zone Offsets for PeopleSoft Time and Labor

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

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

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

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

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.
2. On the PeopleTools Options page, in the Base Time Zone field, browse to select the time zone in which you want all reported time to be stored.
3. Select PeopleTools, Utilities, International, Time Zones.
4. On the Time Zone Data page (and Daylight Savings page, if applicable), change the default settings.

The Time Zone Data page and Daylight Savings page display the default time zone settings that PeopleSoft PeopleTools delivers. You can change the settings on these pages to customize the information for your

organization.

5. On the Time Zone Data page, create time zone offsets by clicking the Generate Query Offsets button to populate the time zone offsets table with values that represent the differences between the local and base time zones.
6. Enter the Start and End dates for the offset generation.
  - Specify Start Date: Determine 5 years prior to current date and use year begin date as Start Date.
  - Specify End Date: Determine 5 years in the future, from current date and use year end date as End Date.
7. Click OK.
8. Click Save.

## **Task 1-8: Installing Absence Management and Global Payroll Core**

This section discusses:

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

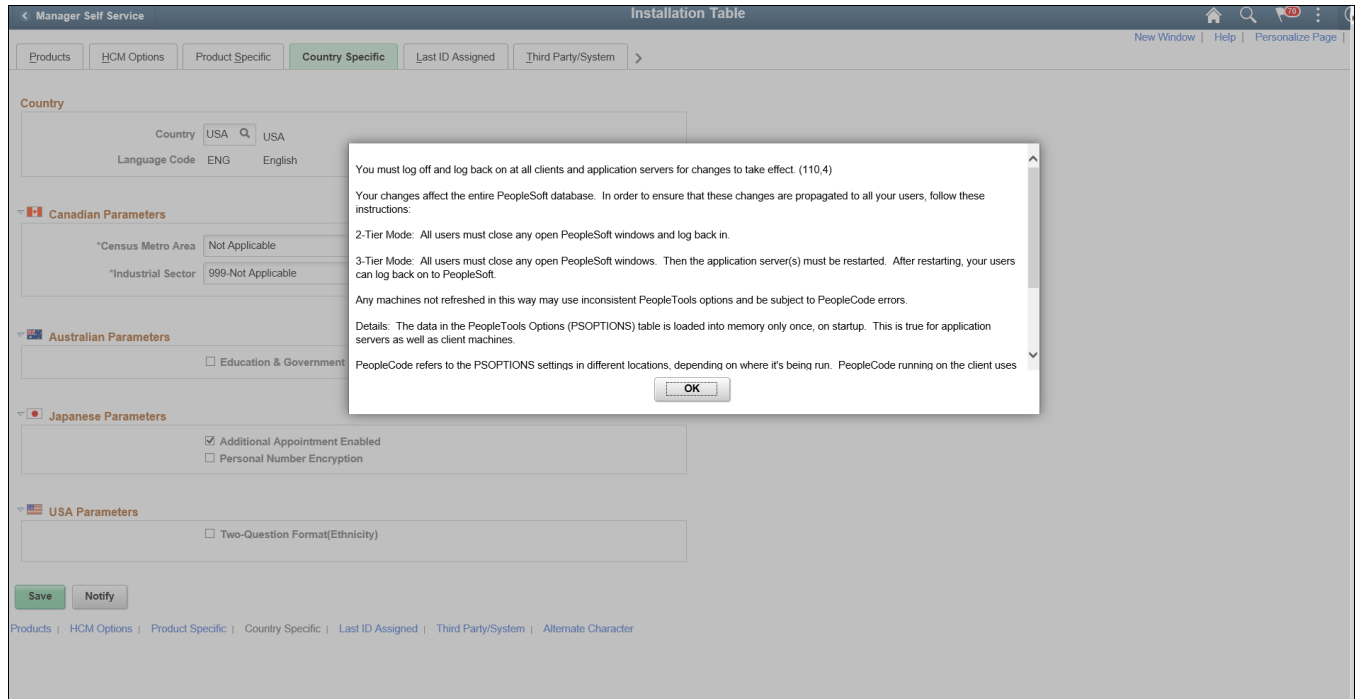
### **Task 1-8-1: Verifying Installation Settings for PeopleSoft Absence Management**

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

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

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

1. Select Set Up HCM, Install, Installation Table.
2. Verify that the Global Payroll Core check box is selected.
3. If any changes are performed to the Installation Table, the following informational message appears after saving the page:



## Informational Message

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

## Task 1-8-2: Updating Process and Job Definitions for Packager

This section discusses:

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

### Understanding Updates for Packager

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

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

### Updating Process Definitions for Packager

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

The following table lists the process definitions that you need to run on a Microsoft Windows Process Scheduler:

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

To update the preceding Process Definitions:

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

## Updating Job Definitions for Packager

You need to run the following job definitions on a Microsoft Windows Process Scheduler:

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

To update the preceding Job Definitions:

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

The Server Name field contains the value *PSNT*.

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

## Task 1-9: Granting Access to Homepage Personalization

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

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

To add the Portal User Role to the user IDs:

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

---

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

---

## Task 1-10: Installing PeopleSoft Global Payroll Country Extensions

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This section discusses:

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

### Understanding the PeopleSoft Global Payroll Country Extensions Installation

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

---

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

---

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

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

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



## Task 1-10-1: Updating Installation Indicators

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

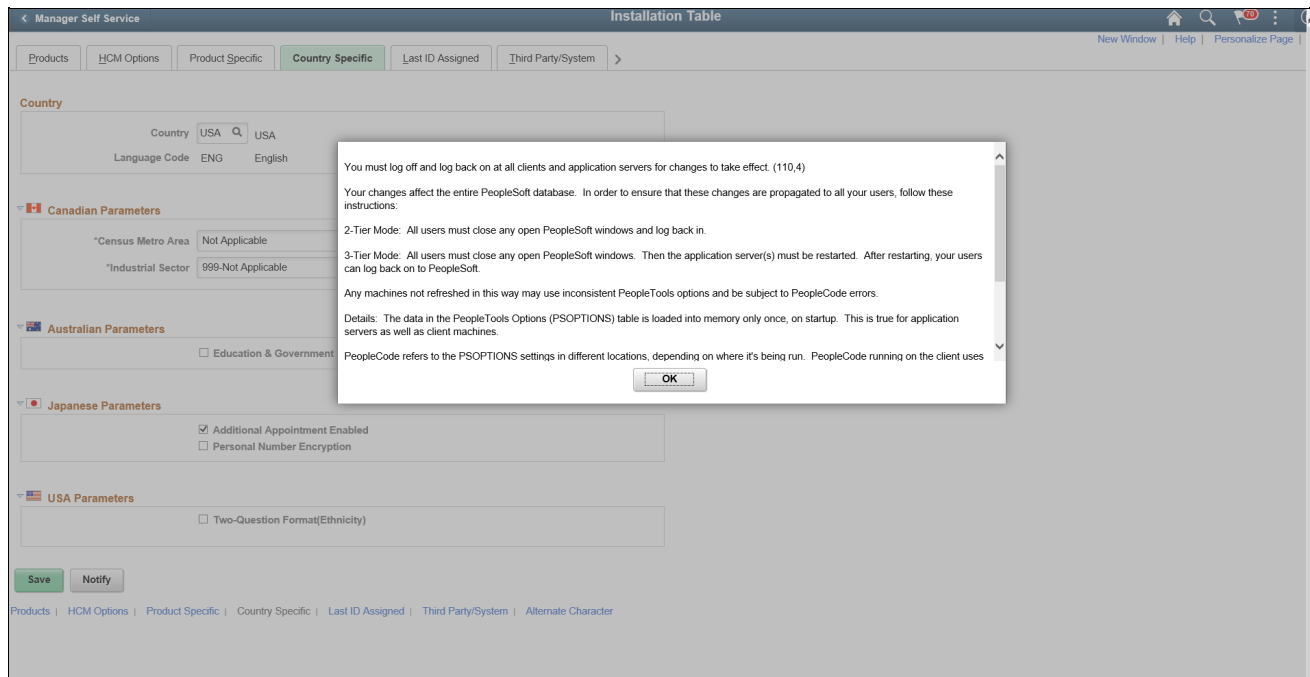
1. Select Set Up HCM, Install, Installation Table.
2. On the Products page, select the Installed GP Countries link (at the bottom) to view a list of countries.
3. Clear the check boxes for all of the Country Extensions that you have *not* licensed (so that the only check boxes selected are for those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

---

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

---

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



Informational Message

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

## Task 1-10-2: Updating Stored Installation Indicators

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

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

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

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

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

After you install *both* the HRSYS and HRDMO databases, carry out these steps:

1. Use PeopleSoft Data Mover to run the `gpcerate_exp.dms` script, which you can find in your `<PS_APP_HOME>\scripts` directory, against your HRDMO database.

---

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

---

2. Use PeopleSoft Data Mover in bootstrap mode to run the `gpcerate_imp.dms` script (in your `<PS_APP_HOME>\scripts` directory) against your HRSYS database (using the `dat` file that was just generated).

---

**Note.** If you are running on DB2 z/OS, follow the instructions in the script `gpcerate_imp.dms` to alter it to work properly in your environment.

---

## Task 1-10-4: Deploying Java Security Files

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

To download and deploy Java Security Policy Files:

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

Look for the download link under Additional Resources, Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files for JDK/JRE 8.

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

---

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

---

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

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This section discusses:

- Understanding the PeopleSoft ePay Payslips Installation
- Installing the PeopleSoft ePay Payslips Functionality
- Installing ePay on z/OS Platforms
- Modifying the Sun JVM Configuration to Increase Heap Size

### Understanding the PeopleSoft ePay Payslips Installation

This section details the installation steps for PeopleSoft ePay Payslips (for PeopleSoft Global Payroll). PeopleSoft ePay Payslips for PeopleSoft Global Payroll is dependent on a working FTP server.

---

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

---

See the section *Modifying the Sun JVM Configuration to Increase Heap Size* in this chapter.

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

To install PeopleSoft ePay Payslips for PeopleSoft Global Payroll:

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

---

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

---

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

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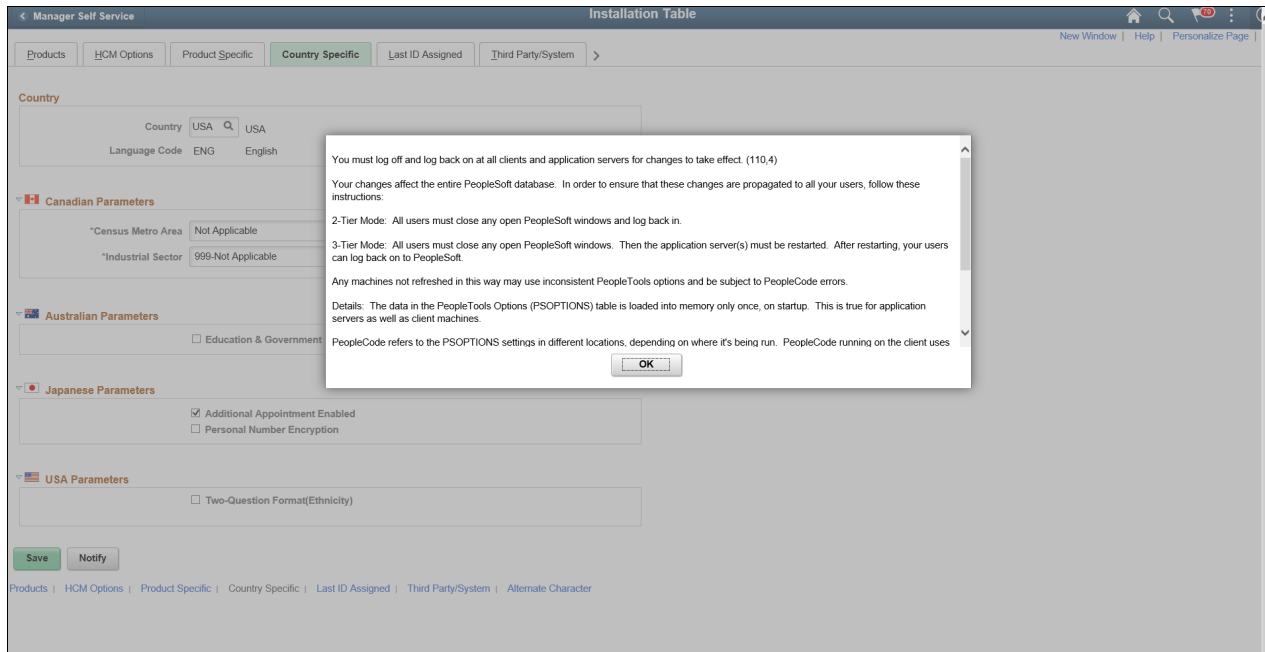
**Important!** You may create your own URL ID and update this URL, instead of using GP\_SS\_PSLP\_FTP. If you create your own URL ID you must update the Self Service Payslip Options to point to your new URL ID.

---

See *PeopleSoft HCM: ePay*, "Setting Up View Payslips."

4. Check the PeopleSoft Installation Table Settings, as follows:
  - a. Select Set Up HCM, Install, Installation Table.
  - b. Select the ePay check box on the main Installation Table tab (Products).

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



Informational Message

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

## Task 1-11-2: Installing ePay on z/OS Platforms

This section details additional instructions to install ePay on z/OS platforms:

1. Select Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings.

- On the Installation Settings page, in the Payslip Store Option area, select Attachment from the Store Option drop-down list, as shown in this example:

The screenshot shows the 'Installation Settings' page. At the top, there are fields for 'TL Feed Phase' (3000), 'Cancel Phase' (2000), and 'Progress Interval' (500). Below this is the 'Absence Processing' section with 'Months of Absence History' set to 24 and a checkbox for 'Bundle PI on Output'. The 'Absence Event Entry' section has 'Days Before Current Date' and 'Days After Current Date' both set to 90, and checkboxes for 'Role not allowed Approve Automatically', 'Hide Forecast Button', and 'Hide Save For Letter Button'. The 'Absence Analytics Settings' section has 'Days Before Current Date' and 'Days After Current Date' both set to 90, and a dropdown for 'Access Type' set to 'By Part Point Mgmt Supervisor'. The 'Enable Pivot Grid Analytics' section has a checkbox for 'Enable Pivot Grid Analytics'. The 'Payment Processing' section has a dropdown for 'Script Location' and a text field for 'Script Location example: C:\ibid\'. The 'Rule Package Defaults' section has checkboxes for 'Compare Report Print Options' (Errors/Warnings, Modified, New, Deleted, Unchanged) and 'Continue Upgrade Processing' (With Errors, With Warnings). The 'Payslip Store Option' section at the bottom has a dropdown for 'Store Option' set to 'Attachment'. At the bottom left are 'Save' and 'Notify' buttons. At the bottom right are links for 'Installation Settings', 'Schedule Settings', and 'Configuration Settings'.

Installation Settings page

- Click Save.

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

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

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

Here is an example of the modified JVM configuration, with the changes in bold text:

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

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

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

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

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

1. Copy the files \*.pdf from the PeopleSoft SQR directory to your local hard drive.
2. Sign in to the PeopleSoft HCM database and select Set Up HCM, Product Related, Global Payroll and Absence Mgmt, Reports, Form Definition CHE.
3. Use the following table to select the Form IDs for your PeopleSoft Global Payroll for Switzerland:

PeopleSoft Product	Form ID	Effdt	Filename
Global Payroll for Switzerland	LAW-C1	01/01/2004	BETEILIGUNGEN.pdf
Global Payroll for Switzerland	LAW-P1	01/01/2004	_11lohna_3-dfi_25-08-06.pdf
Global Payroll for Switzerland	LAW-P1B	01/01/2004	_11lohna_3-dfi_25-08-06b.pdf
Global Payroll for Switzerland	LAW-P1EDIT	01/01/2004	_11lohna_3-dfi_300913_edit.pdf
Global Payroll for Switzerland	LAW-P2	01/01/2004	_11lohna_3-dfi_25-08-06_x.pdf

4. For each Form ID, click the Delete button, as shown in this example:

**Form Definition CHE**

Form ID: LAW-P1

**Form Data**

\*Effective Date: 01/01/2004  
End Date:  
\*Description: LAW Statement - Part 1  
Comment:

**Field Mapping**

	*Language Code	Default Language	Attached File	View	Delete	Details
1	German	<input checked="" type="checkbox"/>	_11lohna_3-dfl_25-08-06.pdf	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Details</a>

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

Form Definition CHE page



5. Click Save.

The Add button appears, as shown in this example:

The screenshot shows the 'Form Definition CHE' page. The 'Form Data' section includes fields for 'Effective Date' (01/01/2004), 'End Date', 'Description' (LAW Statement - Part 1), and 'Comment'. The 'Field Mapping' section contains a table with columns: 'Language Code', 'Default Language', and 'Attached File'. The table has one row with 'German' as the language code and 'Default Language' checked. Below the table are buttons for 'Add', 'Details', '+', and '-'. At the bottom of the page are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Form Definition CHE Page showing Add button

6. Click Add.

7. Navigate to the PDF Form File that you saved on your hard drive, select the file and click the Upload button.

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

## Task 1-13: Installing Directory Interface

This section discusses:

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

### Prerequisites

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

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

**Note.** Novell NDS is no longer bundled with PeopleSoft applications. For the most current information on the directory servers that Oracle supports, refer to the certification information and product documentation.

See My Oracle Support, Certifications.

See the PeopleSoft Human Capital Management hardware and software requirements documentation.

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

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

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

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

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

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

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

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

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

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

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

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

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

---

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

---

## Task 1-14: Installing PeopleSoft PayBill Management

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

- Oracle

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

---

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

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

---

To activate the required service operations to integrate with the PeopleSoft FSCM 9.2 database:

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

```
activate_all_hcm.sql
```

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

---

## Task 1-15: Installing Service Handlers

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

See *PeopleTools: PeopleSoft Integration Broker*.

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

To install and activate service handlers:

1. Sign in to the PeopleSoft portal and select PeopleTools, Integration Broker, Integration Setup, Services.

2. Identify the products listed in the following table that have Service Handlers that need to be activated:

<b>Product</b>	<b>Contain Service Handlers That Must Be Activated</b>
Absence Management	No
Benefits Administration	Optional
Candidate Gateway	Optional
Directory Interface	Yes
eBenefits	No
eCompensation	Yes
eCompensation Manager Desktop	Yes
ePay	No
ePerformance	Optional
eProfile	No
Global Payroll for Argentina (listed as HR Core)	Yes
Global Payroll for Australia	No
Global Payroll for Brazil (listed as HR Core)	Yes
Global Payroll for China	No
Global Payroll for Core	Yes
Global Payroll for France	No
Global Payroll for Hong Kong	No
Global Payroll for India	No
Global Payroll for Japan (listed as Benefits Administration)	Yes
Global Payroll for Malaysia	No
Global Payroll for Mexico (listed as HR Core)	Yes
Global Payroll for New Zealand	No
Global Payroll for Singapore	No

<b>Product</b>	<b>Contain Service Handlers That Must Be Activated</b>
Global Payroll for Spain	No
Global Payroll for Switzerland	Optional
Global Payroll for Thailand	No
Global Payroll for UK	No
Global Payroll for United States (HR Core)	Yes
HCM for the U.S. Federal Government	No
HCM for Education and Government	Yes
HCM Shared Components	Yes
Human Resources	Yes
Payroll for North America	Yes
Payroll Interface	No
Pension Administration	Optional
Talent Acquisition Manager	Optional
Time and Labor	Optional
Workforce Compensation Solutions	No

3. Carry out these steps for the necessary products:
  - a. Get a list of services for products (as applicable).
  - b. Enter each service name in the Service name field.
  - c. Click Search for each.
4. On the Service details page, click the service operation link in the Existing Operations grid.  
The Service Operation details page appears.
5. Select the Handlers tab, and verify that the Handlers Status is set to Active.

## **Task 1-16: Configuring Global Search**

---

This section discusses:

- Understanding Configuring Global Search
- Defining New Roles for Global Search

- Configuring the Portal Node for PeopleSoft HCM
- Deploying and Indexing the Searches that Oracle Delivers

## Understanding Configuring Global Search

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 regarding the essential hardware to help ensure capacity for peak concurrent usage of your PeopleSoft 9.2 environment. Failing to follow these recommendations can impact the performance and stability of your PeopleSoft 9.2 environment.

---

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.

As part of PeopleSoft Search, PeopleSoft HCM offers a number of pre-configured global searches and component keyword search pages. You should review the information about PeopleSoft Search Framework implementation for HCM in the product documentation for PeopleSoft HCM: Application Fundamentals for your new release to determine the extent to which PeopleSoft Search can be enabled for your environment.

In addition, search is implemented in specific products and functionality where Verity was provided in releases prior to PeopleSoft 9.2. You should review the PeopleSoft HCM product documentation for your new release to determine the extent to which search is enabled for your environment.

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

This section list the roles that are provided for Global Search and Search Pages.

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

1. Select PeopleTools, Security, User Profiles, User Profiles, and select the appropriate user.
2. On the User Profiles page, select the Roles tab.
3. Add the following roles, which are listed in this table along with the Permission Lists and Search:

Role	Permission List	Search
Search- Absence	HCCPAMSS1S	Absence Request, Absence Balance
Search- AppIndex	HCCPRS1321	Applicant
Search-Benefit	HCCPBN1001	Health Benefits
Search- Career Plan	HCCPSS3101	Career Plan
Search- Company Directory	HCCPSS3100	Person
Search- Compensation	HCCPSS2131	Compensation History, Total Rewards

Role	Permission List	Search
Search-Job	HCCPHR3311	Job Data
Search- JobPostings	HCCPRS1320	Job Postings
Search- Succession Plan	HCCPSS3102	Succession Plan
Search-Payroll for NA	HCCPPY1001	General Deductions, Additional Pay, Garnishments
Search- Performance	HCCPEP2500	Performance
Search- Time	HCCPSS2132	Time
GP Search Administration	HCCPGPSEARCH	Positive Input

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

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

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

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

This section discusses:

- Verifying the Roles for Search Users
- Identifying, Deploying, and Indexing Search Definitions
- Using Positive Input Manual Search in Global Payroll

## Verifying the Roles for Search Users

Oracle delivers PeopleSoft HCM search modules for which predefined Custom, Global, and Keyword searches are provided.

Before you can deploy the search definitions, you must verify that the roles are assigned to the call back user (PSAPPS), as follows:

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

## Identifying, Deploying, and Indexing Search Definitions

The following table lists the PeopleSoft HCM searches for which predefined searches are provided:

Search Definition	Search Type	Search Definition Name
Health Benefits	Global Search and Keyword Search	HC_BEN_HEALTH_BENEFIT
Compensation History	Global Search	HC_COMP_COMPENSATION_HISTORY
Total Rewards	Global Search	HC_COMP_TOTALREWARDS
Development Tips - Competencies	Custom Search	HC_EP_DEVCOMP_TIP
Development Tips - SubCompetencies	Custom Search	HC_EP_DEVSUB_TIP
Development Tips	Custom Search	HC_EP_DEV_TIP
Performance/Development Documents	Global Search	HC_EP_PERF_DEV
Results Writer - Competencies	Custom Search	HC_EP_WRITER_COMP
Results Writer - SubCompetencies	Custom Search	HC_EP_WRITER_SUBCOMP
Absences Request	Global Search	HC_GP_ABS_RQST
Absence Balance	Global Search	HC_GP_ABS_SRCH_BAL
Create Additional Pay	Global Search and Keyword Search	HC_HPY_CREATE_ADDL_PAY
Create General Deduction	Global Search and Keyword Search	HC_HPY_GEN_DED
Review Garnishment	Global Search and Keyword Search	HC_HPY_REVW_GARN



Search Definition	Search Type	Search Definition Name
Career Planning	Global Search	HC_HR_CAREER_PLAN
Person	Global Search	HC_HR_COMPANY_DIRECTORY1
JOB Data <sup>2</sup>	Global Search and Keyword Search	HC_HR_JOB_DATA
Succession Planning	Global Search	HC_HR_SUCC_PLAN
All Applicants	Custom Search	HC_HRS_APPLICANT
Applicant	Global Search and Custom Search	HC_HRS_APP_INDEX
Application Profiles	Custom Search	HC_HRS_APPLICATION_CONTENT
Data Mapping	Custom Search	HC_HRS_DATA_MAP
Job Posting Profiles	Custom Search	HC_HRS_JOB_CONTENT
All Job Openings	Custom Search	HC_HRS_JOB_OPENING
Job Posting	Global Search and Custom Search	HC_HRS_JOB_POSTING
Job Profiles	Custom Search	HC_JPM_NONPERSON_PROFILE
Person Profiles	Custom Search	HC_JPM_PERSON_PROFILE
Timesheets	Global Search	HC_TL_GBL_TIMESHEET
Positive Input Search	Custom Search	GP_PI_SRCH
ELM <sup>1</sup>	Global Search	LS_LM_LEARNING

<sup>1</sup> The ELM Search definition should be imported from an ELM database using the following navigation: PeopleTools, Search Framework, Administration.

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

<sup>2</sup> National ID is available as an advanced search field for Job Data search.

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

1. Deploy: Select PeopleTools, Search Framework, Search Admin Activity Guide.  
In the Search Administration activity guide, expand the Administration section, and select Deploy/Delete Object.
2. Index the Search Definitions: Run the process by selecting Select PeopleTools, Search Framework, Search Admin Activity Guide.  
In the Search Administration activity guide, expand the Administration section, and select Schedule Search Index.

See *PeopleTools: Search Technology*.

## Using Positive Input Manual Search in Global Payroll

For Positive Input Manual Search in Global Payroll you must fulfill the following requirements:

1. To enable Positive Input Search, you must use PeopleSoft PeopleTools 8.56 or higher.
2. You must configure PeopleSoft Search Framework, which uses Elasticsearch, before using this functionality.

Positive Input Search is a custom search feature which incorporates Elasticsearch functionality.

For more information on the Positive Input feature, see the *PeopleSoft HCM: Global Payroll* product documentation.

For more information on setting up PeopleSoft search for HCM, see the *PeopleSoft HCM: Application Fundamentals* product documentation.

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## Task 1-17: Installing Configurable Matrices and Metadata

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

Configurable Matrices are dependent on metadata definitions that in turn are dependent on the proper installation of Sun java classes.

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

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

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**Note.** For a UNIX platform, the files are in the `<PS_APP_HOME>\appserv\classes` directory.

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

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

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

To install PeopleSoft Human Resources for French Public Sector:

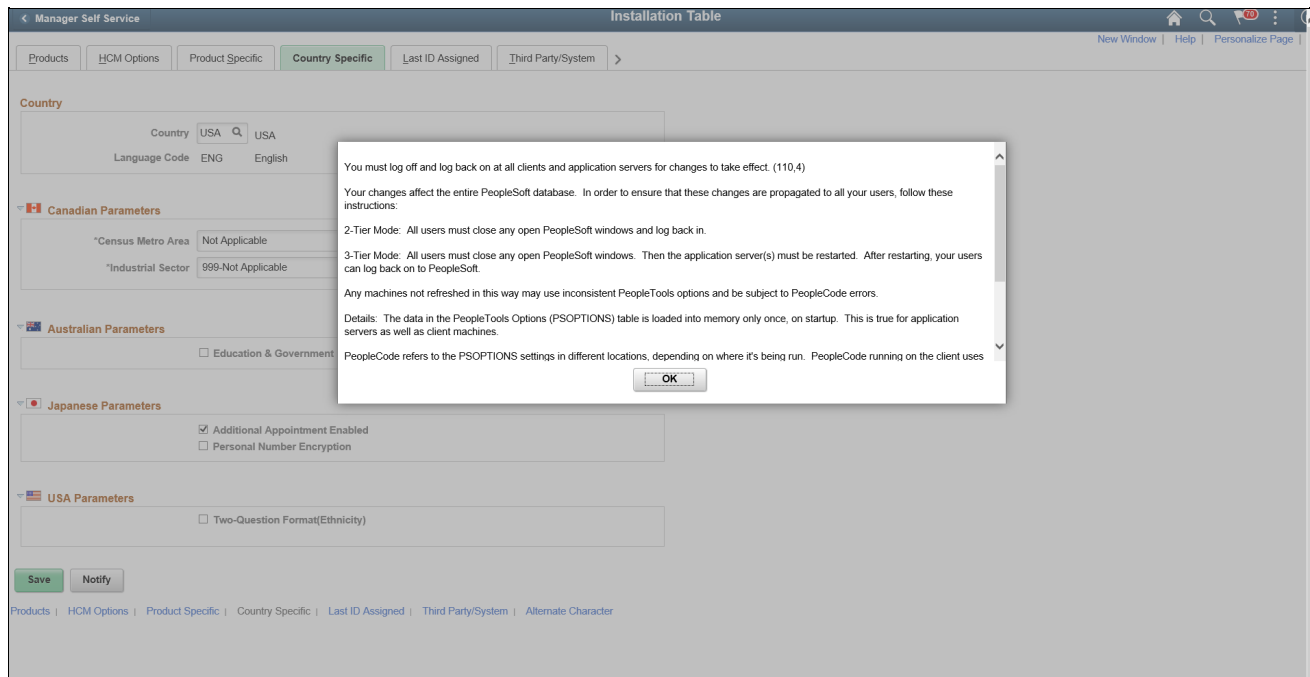
1. Select Set Up HCM, Install, Installation Table, Products, and verify that the Human Resources and French Public Sector check boxes are selected.

If they are not already selected, select them.

2. Go to the Country Specific page, select the Installed HR Countries link and verify that France is selected.

If it is not selected, select it.

3. If it was necessary to make any changes to the Installation Table, you receive the message "You must log off and log back on at all clients and application servers for changes to take effect," as shown in the following example:



Informational Message

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

## Task 1-19: Verifying Desktop Integration is Enabled

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

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

On the Outlook Client, confirm the following:

1. Your Microsoft Outlook is version 2007, 2010, or 2013.
2. You have loaded the PeopleSoft Menu add-in to your Outlook.
3. The PeopleSoft Settings and Options page in Outlook is populated correctly.

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

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

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See *PeopleSoft HCM: Integration Interfaces*.