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# PeopleSoft Enterprise Performance Management 9.0 Supplemental Installation Guide

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PeopleSoft Enterprise Performance Management 9.0  
Supplemental Installation Guide  
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# Contents

## Preface

<b>Preface.....</b>	<b>vii</b>
Audience.....	vii
Related Publications.....	vii
We Welcome Your Comments.....	viii

## Chapter 1

<b>Installing and Configuring PeopleSoft Enterprise Performance Management Components.....</b>	<b>1</b>
Installing PeopleSoft PeopleTools and Creating the PeopleSoft EPM Database.....	1
Reviewing PeopleSoft EPM 9 Demo Database Sizing by Platform.....	2
Accessing Instructions for Multi-Language Customers.....	2
Disabling Applets on the Installation Table.....	3
Running Required Scripts for PeopleSoft Enterprise Workforce Rewards, Workforce Planning and Workforce Scorecard.....	3
Loading PeopleSoft Workforce Scorecard Sample Data (Demo Database).....	4
Loading PeopleSoft Customer Scorecard Sample Data (Demo Database).....	4
Loading PeopleSoft Project Portfolio Management Sample Data (Demo Database).....	5
Loading PeopleSoft Supplier Rating Sample Data (Demo Database).....	5
Loading PeopleSoft CFO Portal Solution KPI Sample Data (Demo Database).....	6
Loading PeopleSoft Investor Portal Solution KPI Sample Data (Demo Database).....	7
Loading PeopleSoft Healthcare Scorecard Sample Data (Demo Database).....	7
Loading PeopleSoft Manufacturing Scorecard Sample Data (Demo Database).....	8
Installing the PeopleSoft EPM Charting Tool (AVS) and ABM Applets.....	8
Prerequisites.....	9
Installing for an Oracle Application Server, Oracle WebLogic Server, and IBM WebSphere Server.....	10
Configuring PeopleSoft Applications to Enable Charting.....	21
Installing and Configuring PeopleSoft Enterprise Planning and Budgeting.....	22
Installing the PeopleSoft Planning and Budgeting Spreadsheet Add-In Program.....	22
Defining Software Requirements.....	22
Installing the PeopleSoft BP-Spreadsheet Add-In Program.....	23
Verifying the Installation of the PeopleSoft BP-Spreadsheet Add-In Program.....	24
Reviewing Troubleshooting Tips.....	30

## Chapter 2

<b>Installing and Configuring Ascential DataStage.....</b>	<b>33</b>
Prerequisites.....	34
Accessing PeopleSoft EPM Warehouse 9.0 Documentation.....	34
Ascential DataStage Documentation.....	34
Preparing for the Installation.....	34
Upgrading Previous Ascential DataStage Releases.....	36
Installing Ascential DataStage Server on Microsoft Windows.....	37
Installing the Ascential DataStage Server.....	37
Starting and Stopping the Ascential DataStage Server on Microsoft Windows.....	42
Installing the Ascential DataStage Server on UNIX.....	43
Understanding the Ascential DataStage Server Installation on UNIX.....	44
Installing the Ascential DataStage Server on UNIX.....	47
Completing the Ascential DataStage Installation on UNIX.....	49
Starting and Stopping the Ascential DataStage Server on UNIX.....	50
Verifying the Ascential DataStage Server is Running on UNIX.....	50
Running the Ascential DataStage Server on a Non-Default Port (Optional).....	50
Installing the Ascential DataStage Clients.....	51
Configuring the Ascential DataStage Server for Multiple Database Platforms.....	54
Creating the Ascential DataStage Projects.....	54
Configuring Environmental Parameters.....	54
Importing the .DSX Files.....	55

## Chapter 3

<b>Installing and Configuring Ascential MetaStage.....</b>	<b>57</b>
Prerequisites.....	57
Accessing Ascential MetaStage and PeopleSoft MetaBrokers Documentation.....	57
Preparing for the Ascential MetaStage Installation.....	58
Installing Ascential MetaStage.....	58
Installing the PeopleSoft MetaBrokers.....	62
Configuring the Host Database for the Ascential MetaStage Directory.....	63
Creating the Ascential MetaStage Directory.....	63
Creating a New Ascential MetaStage Directory.....	63
Completing Setup of a Microsoft SQL Server Data Source.....	66
Completing Setup of an Oracle Data Source.....	66
Completing Setup of a DB2 Data Source.....	67
Populating the Ascential MetaStage Directory.....	67

**Appendix A**

<b>Installing Business Objects XIR2 Sample Reports and Utilities.....</b>	<b>69</b>
Prerequisites.....	69
Copying and Extracting the Universes using the BusinessObjects Import Wizard.....	70
Using the BusinessObjects Import Wizard.....	70
Selecting the Source Environment.....	72
Selecting the Destination Environment.....	73
Selecting Objects to Import.....	74
Selecting the Categories to Import.....	79
Selecting the Folders and Objects to Import.....	80
Selecting the Universe Folders and Universes to Import.....	81
Editing the Universe Connection Information for the PeopleSoft EPM Database.....	87
Selecting a Universe Domain to Import.....	90
Editing the Login Parameters to Access Your Middleware.....	92
Testing the Data Source Server.....	93
Defining Advanced and Custom Parameters.....	94
Creating a New Universe Connection (Optional).....	96
Selecting the Target Universe Domain and Groups to Export.....	98
Accessing the PeopleSoft EPM WebIntelligence Documents Using BusinessObjects InfoView.....	100

**Appendix B**

<b>Installing and Configuring Data Mining Tools.....</b>	<b>105</b>
Prerequisites.....	105
Installing com.peoplesoft.epm.cr.jar on the Web Server.....	105
Installing on BEA WebLogic.....	106
Installing on Oracle Application Server.....	106
Installing on IBM WebSphere.....	107
Modifying psappsrv.cfg File.....	124
Installing Additional Component Software on the Process Scheduler Machine.....	124
Installing the PeopleSoft EPM Adapter Library File.....	125
Modifying Microsoft NT Process Scheduler Configuration File.....	127
Ensuring Appropriate Permissions are Set.....	128
Designating a Vendor Model File Directory.....	129
Modifying Installation Options.....	130
Ensuring the Sun Java Executable is on the Command Path.....	131

**Appendix C**

<b>Oracle Discoverer on PeopleSoft EPM.....</b>	<b>133</b>
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Reviewing Related Documentation.....133

Reviewing Supported Platforms.....134

Installing Oracle Discoverer and PeopleSoft EPM Tables in one Database.....134

Reviewing Prerequisites for Installing Oracle Business Intelligence Tools.....134

Creating the End User Layer.....134

Accessing and Importing the EEX File.....143

Granting Users Permission to Access Business Areas.....150

Installing Sun Java Plugin from Microsoft IE.....150

Securing the Reports (Optional).....150

**Index .....151**

# Preface

This preface discusses:

- Audience
- Related Publications
- We Welcome Your Comments

This book is designed to direct you through a basic PeopleSoft Enterprise Performance Management installation. It is not a substitute for the database administration manuals provided by your RDBMS vendor, the network administration manuals provided by your network vendor, or the installation and configuration manuals for third-party products used with PeopleSoft. These installation instructions are also in addition to the PeopleTools installation.

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**Note.** You must install PeopleTools prior to completing the installation procedures covered in this book. To find the PeopleTools installation documentation, go to Customer Connection. See the Category “Installation Guides and Notes,” and then look under the PeopleTools subcategory.

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**Note.** Before proceeding with your installation, check PeopleSoft’s Customer Connection site to ensure that you have the latest version of this installation guide.

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## Audience

This book is written for the individuals responsible for installing and administering the PeopleSoft environment. We assume that you are familiar with your operating environment and RDBMS and that you have the necessary skills to support that environment. You should also have a working knowledge of SQL.

We recommend that you have completed at least one PeopleSoft introductory training course (particularly the Configuration and Administration course) and have a basic understanding of the PeopleSoft System.

Probably the most important component in the installation and maintenance of your PeopleSoft system is your onsite expertise. Only qualified and experienced individuals should attempt to install PeopleSoft. If you have any doubts as to whether your onsite staff is capable of successfully completing an installation, contact your PeopleSoft representative.

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## Related Publications

To install third-party products for use with PeopleSoft, including those products that are packaged with your PeopleSoft shipment, you should refer to the documentation provided with those products as well as this documentation. For reference information on PeopleTools, you may wish to consult the following books:

- *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration.* For information relating to administration tools for the PeopleSoft application server, web servers including Oracle Application Server and BEA’s WebLogic and IBM’s WebSphere. It also contains information about building and maintaining search indexes, database level auditing, and PeopleTools utilities

- *Enterprise PeopleTools 8.48 PeopleBook: Security Administration*. For more information on setting up and modifying user access to your PeopleSoft applications.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Language Reference*. For reference information on the PeopleCode language, such as built-in functions, classes, meta-SQL, system variables, and so on.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Developer's Guide*. For general information about the PeopleCode editor, the Component Processor, the data buffers, and how to use specific functions and classes.
- *Enterprise PeopleTools 8.48 PeopleBook: Crystal Reports for PeopleSoft*. For information on Crystal reports.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*. For information on configuring and scheduling batch processes.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer* and *Enterprise PeopleTools 8.48 PeopleBook: Global Technology*. For information on the Application Designer, globalization, and customizing PeopleSoft applications.
- *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine*. For information on the PeopleSoft proprietary batch programming tool.

For reference information on PeopleSoft Enterprise Performance Management applications, refer to the PeopleBooks documentation for your application.

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## We Welcome Your Comments

Your comments are very important to us. We encourage you to tell us what you like or would like changed about our application books, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft EPM Information Development Manager  
PeopleSoft, Inc.  
4460 Hacienda Drive  
Pleasanton, CA 94588-8618

While we can't guarantee to answer every email message, you can be sure we'll pay careful attention to your comments and suggestions; we're always looking for ways to improve our product communications for you.



# CHAPTER 1

## Installing and Configuring PeopleSoft Enterprise Performance Management Components

This chapter discusses:

- Installing PeopleSoft PeopleTools and Creating the PeopleSoft EPM Database
- Disabling Applets on the Installation Table
- Running Required Scripts for PeopleSoft Enterprise Workforce Rewards, Workforce Planning and Workforce Scorecard
- Loading PeopleSoft Workforce Scorecard Sample Data (Demo Database)
- Loading PeopleSoft Customer Scorecard Sample Data (Demo Database)
- Loading PeopleSoft Project Portfolio Management Sample Data (Demo Database)
- Loading PeopleSoft Supplier Rating Sample Data (Demo Database)
- Loading PeopleSoft CFO Portal Solution KPI Sample Data (Demo Database)
- Loading PeopleSoft Investor Portal Solution KPI Sample Data (Demo Database)
- Loading PeopleSoft Healthcare Scorecard Sample Data (Demo Database)
- Loading PeopleSoft Manufacturing Scorecard Sample Data (Demo Database)
- Installing the PeopleSoft EPM Charting Tool (AVS) and ABM Applets
- Installing and Configuring PeopleSoft Enterprise Planning and Budgeting
- Installing the PeopleSoft Planning and Budgeting Spreadsheet Add-In Program

This chapter discusses how to install various components required for running Oracle's PeopleSoft Enterprise Performance Management 9.0 applications.

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### Task 1-1: Installing PeopleSoft PeopleTools and Creating the PeopleSoft EPM Database

This section discusses:

- Reviewing PeopleSoft EPM 9 Demo Database Sizing by Platform
- Accessing Instructions for Multi-Language Customers

## Reviewing PeopleSoft EPM 9 Demo Database Sizing by Platform

This table lists the approximate PeopleSoft EPM 9.0 Demo database size for each platform.

Platform	Database Type	Demo Database Size (approximate)
Oracle	ANSI	51 GB
	Unicode	51 GB
DB2/UNIX	ANSI	18 GB
	Unicode	27 GB
DB2/zOS	ANSI	14 GB
	Unicode	17 GB
Microsoft SQL Server	ANSI	5 GB
	Unicode	6 GB

For details, see the *PeopleSoft Enterprise PeopleTools 8.4x Installation and Administration* PeopleBook for your database platform.

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**Note.** Installing PeopleSoft EPM 9 on UNIX requires the installation of CD1 only. You will be prompted to install CD2 only when installing on Microsoft Windows.

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**Note.** Installing PeopleSoft EPM 9 on Microsoft SQL 2005 Server requires resolution 676138 and PeopleSoft PeopleTools 8.48.01, to resolve a table view creation error issue.

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**Note.** Installing PeopleSoft EPM 9 requires resolution 701309 to add new OBIEE and Public Sector Warehouse product names to the PS\_INSTALLATION table.

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### Task 1-1-1: Accessing Instructions for Multi-Language Customers

Additional multi-language installation instructions are available. You must load several .dat files ( and the corresponding .dms scripts) after you load the equivalent English files. The .dat files are as follows:

- hc890imp\_xxx.dms \ .dat
- mfg890imp\_xxx.dms \ .dat
- ppm890imp\_xxx.dms \ .dat
- scc890imp\_xxx.dms \ .dat
- scf890imp\_xxx.dms \ .dat
- sci890imp\_xxx.dms \ .dat
- scw890imp\_xxx.dms \ .dat
- srm890imp\_xxx.dms \ .dat

Where xxx denotes the language code.

The available languages are:

- CFR—Canadian French
- DUT—Dutch
- ESP—Spanish
- FRA—French
- GER—German
- ITA—Italian
- JPN—Japanese
- POR—Portuguese

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## Task 1-2: Disabling Applets on the Installation Table

Unless you plan to use the applets in conjunction with the PeopleSoft Enterprise Scorecard and Activity-Based Management applications, you must clear (disable) the Applets check box on the installation table.

To clear the Applets check box:

1. Select EPM Foundation, EPM Setup, Installation Analysis & Options, and then click the Web Services tab.
2. Clear the Applets check box and save your changes.
3. Log out of PeopleSoft Pure Internet Architecture, and then log in again to make the changes take effect.

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## Task 1-3: Running Required Scripts for PeopleSoft Enterprise Workforce Rewards, Workforce Planning and Workforce Scorecard

If you are installing any PeopleSoft Enterprise Workforce Analytics applications (PeopleSoft Enterprise Workforce Rewards, PeopleSoft Enterprise Workforce Planning, or PeopleSoft Enterprise Workforce Scorecard), you must run the following PeopleSoft Data Mover script to create and populate the compensation code tree:

DWA88001.dms

To create and populate the compensation code tree:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

DWA88001.DMS

The script loads the sample data that is located in the DWA88001.dat file.

---

## Task 1-4: Loading PeopleSoft Workforce Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Workforce Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database, to use the PeopleSoft Workforce Scorecard in a demo environment. This installs the delivered key performance indicators (KPIs), strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Workforce Scorecard using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and then export the data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata and so on) in a production environment, you must also ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Workforce Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

```
SCW890IMP.dms
```

This script loads the sample data that is located in the SCW890IMP.dat file.

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**Note.** If you have licensed languages other than English, you must also run SCW890IMP\_xxx.dms, where xxx denotes the language code.

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## Task 1-5: Loading PeopleSoft Customer Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Customer Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use the PeopleSoft Customer Scorecard in a demo environment. This installs the included KPIs, strategy components, and so on, and update the final tables to allow you to view the PeopleSoft Customer Scorecard using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Customer Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

```
SCC890IMP.dms
```

This script loads the sample data that is located in the SCC890IMP.dat file.

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**Note.** If you have licensed languages other than English, you must also run SCC890IMP\_xxx.dms, where xxx denotes the language code.

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## Task 1-6: Loading PeopleSoft Project Portfolio Management Sample Data (Demo Database)

If you are installing PeopleSoft Project Portfolio Management, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use the PeopleSoft Project Portfolio Management KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables to allow you to view the PeopleSoft Project Portfolio Management KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load Project Portfolio Management sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

```
PPM890IMP.dms
```

This script loads the sample data that is located in the PPM890IMP.dat file.

---

**Note.** If you have licensed languages other than English, you must also run PPM890IMP\_xxx.dms, where xxx denotes the language code.

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## Task 1-7: Loading PeopleSoft Supplier Rating Sample Data (Demo Database)

If you are installing the PeopleSoft Supplier Rating System, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use the PeopleSoft Supplier Rating System KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables to allow you to view the PeopleSoft Supplier Rating System KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load Supplier Rating System sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.

2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

SRM890IMP.dms

This script loads the sample data that is located in the SRM890IMP.dat file.

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**Note.** If you have licensed languages other than English, you must also run SRM890IMP\_XXX.dms, where XXX denotes the language code.

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## Task 1-8: Loading PeopleSoft CFO Portal Solution KPI Sample Data (Demo Database)

If you are installing PeopleSoft CFO Portal Solution, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use PeopleSoft CFO Portal Solution KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft CFO Portal KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

---

**Note.** Complete this task only if you have licensed the PeopleSoft CFO Portal Solution. The PeopleSoft CFO Portal KPIs are delivered as part of the PeopleSoft EPM Portal Pack.

---

To load PeopleSoft CFO Portal Solution KPIs:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

SCF890IMP.dms

This script loads the sample data that is located in the SCF890IMP.dat file.

---

**Note.** If you have licensed languages other than English, you must also run SCF890IMP\_XXX.dms, where XXX denotes the language code.

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## Task 1-9: Loading PeopleSoft Investor Portal Solution KPI Sample Data (Demo Database)

If you are installing PeopleSoft Investor Portal Solution, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use PeopleSoft Investor Portal Solution KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Investor Portal KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

---

**Note.** Complete this task only if you have licensed the PeopleSoft Investor Portal Solution. The PeopleSoft Investor Portal KPIs are delivered as part of the PeopleSoft EPM Portal Pack.

---

To load the PeopleSoft Investor Portal Solution KPIs:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

```
SCI890IMP.dms
```

This script loads the sample data that is located in the SCI890IMP.dat file.

---

**Note.** If you have licensed languages other than English, you must also run SCI890IMP\_xxx.dms, where xxx denotes the language code.

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## Task 1-10: Loading PeopleSoft Healthcare Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Healthcare Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use PeopleSoft Healthcare Scorecard KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Healthcare Scorecard KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load PeopleSoft Healthcare Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

HC890IMP.dms

This script loads the sample data that is located in the HC890IMP.dat file.

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**Note.** If you have licensed languages other than English, you must also run HC890IMP\_xxx.dms, where xxx denotes the language code.

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## Task 1-11: Loading PeopleSoft Manufacturing Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Manufacturing Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM demo database to use the PeopleSoft Manufacturing Scorecard KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Manufacturing Scorecard KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load PeopleSoft Manufacturing Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VPI*.
2. Run the following PeopleSoft Data Mover script, located in the *PS\_HOME*\scripts directory on the file server:

MFG890IMP.dms

This script loads the sample data that is located in the MFG890IMP.dat file.

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**Note.** If you have licensed languages other than English, you must also run MFG890IMP\_xxx.dms, where xxx denotes the language code.

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## Task 1-12: Installing the PeopleSoft EPM Charting Tool (AVS) and ABM Applets

This section discusses:

- Prerequisites
- Installing for an Oracle Application Server, Oracle WebLogic Server, and IBM WebSphere Server
- Configuring PeopleSoft Applications to Enable Charting

AVS is an additional component charting tool that is provided with PeopleSoft EPM. This charting tool installs on the web server to deliver charts over the Internet. The ABM Applets installs on the web server to deliver ABM Model Analyzer and ABM Real Time over the Internet. This task describes the steps necessary to install AVS/ABM Applets on an Oracle Application Server (OAS), a BEA WebLogic server, or an IBM WebSphere server using a Microsoft Windows/NT or UNIX platform. The following PeopleSoft EPM products use AVS



to generate charts and ABM Real Time and ABM Model Analyzer. Install AVS and ABM Applets if you have licensed any of these applications:

- PeopleSoft Activity-Based Management (ABM)
- PeopleSoft Scorecard

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**Note.** These instructions are specific to the previously stated PeopleSoft EPM applications and should not be confused with the PeopleSoft PeopleTools charting capabilities that you can use with other applications.

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## Prerequisites

This installation must take place after completing your installation and set up of the following:

- PeopleSoft Enterprise PeopleTools 8.48 or higher.

See Enterprise PeopleTools installation documentation for your database platform.

- PeopleSoft Enterprise Performance Management 9.0.
- PeopleSoft Pure Internet Architecture.

See Enterprise PeopleTools installation documentation for your database platform: Installing PeopleSoft Pure Internet Architecture.

- For Microsoft Windows, the system extracts the following .jar files to <PS\_HOME>\class:

com.peoplesoft.epm.ab.jar

com.peoplesoft.epm.bl.jar

com.peoplesoft.epm.cr.jar

com.peoplesoft.epm.pf.jar

- For UNIX, the system extracts the following .jar files to <PS\_HOME>\classes:

com.peoplesoft.epm.ab.jar

com.peoplesoft.epm.bl.jar

com.peoplesoft.epm.cr.jar

com.peoplesoft.epm.pf.jar

---

**Important!** The following instructions are specific to the installation of the PeopleSoft EPM Charting Tool (AVS) and ABM Applets when implementing PeopleSoft EPM 9.0 with PeopleSoft PeopleTools 8.49 Patch 04 and below.

---

If you are implementing PeopleSoft EPM 9.0 with PeopleSoft PeopleTools 8.49 Patch 04 and below, you must manually copy the ear files that are located in the <ps\_home>\setup\mpinternet\archives folder over to the <ps\_home>\setup\PsmPPIAInstall\archives folder before the system can detect the available packages. This ensures that the proper selection options are made available in the following tasks for successful installation of the PeopleSoft EPM Charting Tool (AVS) and ABM Applets.

Copy the following ear files from the archives folder inside of the *mpinternet* folder to the archives folder inside of the *PsmPPIAInstall* folder:

epm\_ab\_oas.ear

epm\_ab\_wl.ear

epm\_ab\_ws.ear  
epm\_cb\_oas.ear  
epm\_cb\_wl.ear  
epm\_cb\_ws.ear  
epm\_pf\_oas.ear  
epm\_pf\_wl.ear  
epm\_pf\_ws.ear

You may now proceed with the PeopleSoft EPM Charting Tool (AVS) and ABM Applet installation tasks.

## Task 1-12-1: Installing for an Oracle Application Server, Oracle WebLogic Server, and IBM WebSphere Server

This section discusses:

- Installing for an Oracle Application Server
- Installing for an Oracle WebLogic 8.x Server
- Installing for an IBM WebSphere Server

### Installing for an Oracle Application Server

To install the charting tool for an Oracle Application Server:

---

**Note.** These instructions use *PS\_HOME* for Microsoft Windows and *\$PS\_HOME* for UNIX platforms, to refer to the location to which PeopleSoft PeopleTools is installed on your machine. For example, C:\PT848. Substitute your actual PeopleSoft PeopleTools path for *PS\_HOME* for Microsoft Windows and *\$PS\_HOME* for UNIX platforms.

---

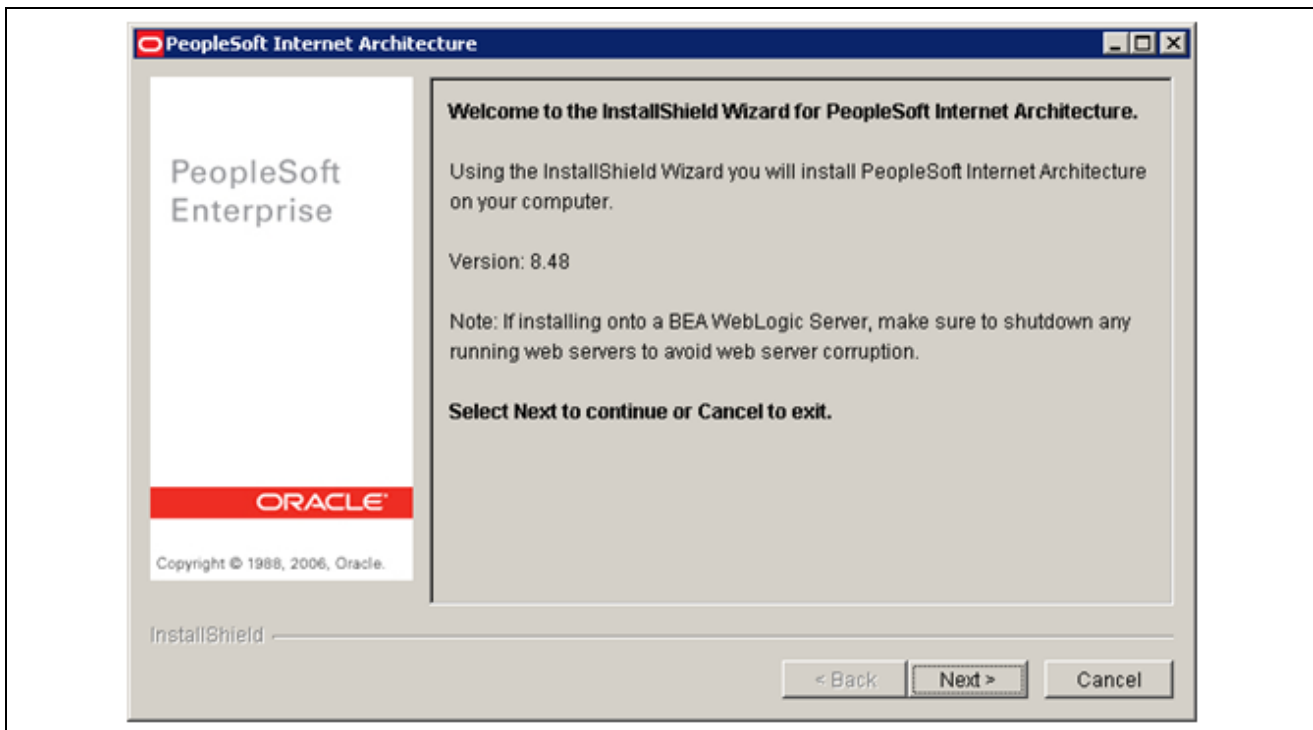
---

**Important!** Refer to the previous *Prerequisites* section for instructions specific to the installation of the PeopleSoft EPM Charting Tool (AVS) and ABM Applets when implementing PeopleSoft EPM 9.0 with PeopleSoft PeopleTools 8.49 Patch 04 and below.

---

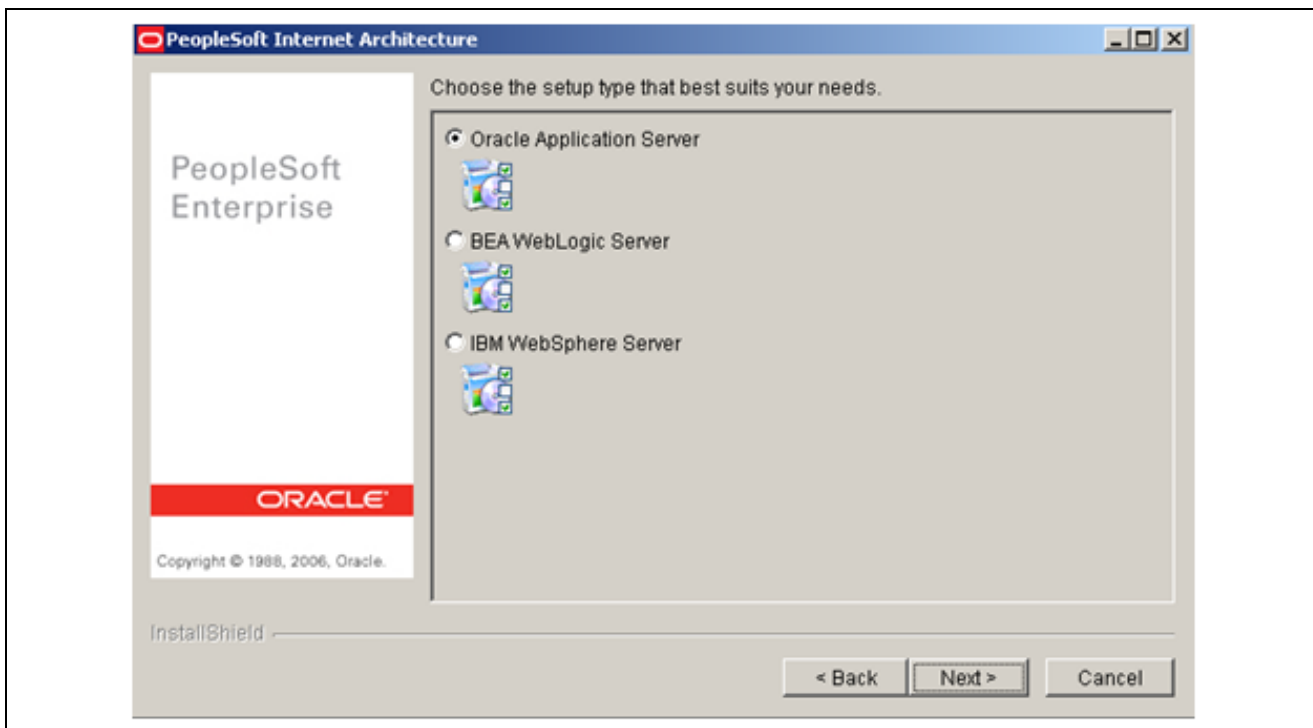
1. Launch the PeopleSoft Pure Internet Architecture Install/Configure utility by launching setup.exe or setup.jar, located in *PS\_HOME*\setup\PsmPPIAInstall\ for Microsoft Windows or *\$PS\_HOME*/setup/PsmPPIAInstall/ for UNIX. Go to the following page (or a similar one,) with the version number reflecting the PeopleSoft PeopleTools version that you have installed.

The PeopleSoft Welcome to the InstallShield Wizard for PeopleSoft Internet Architecture page appears, displaying the PeopleSoft PeopleTools version:



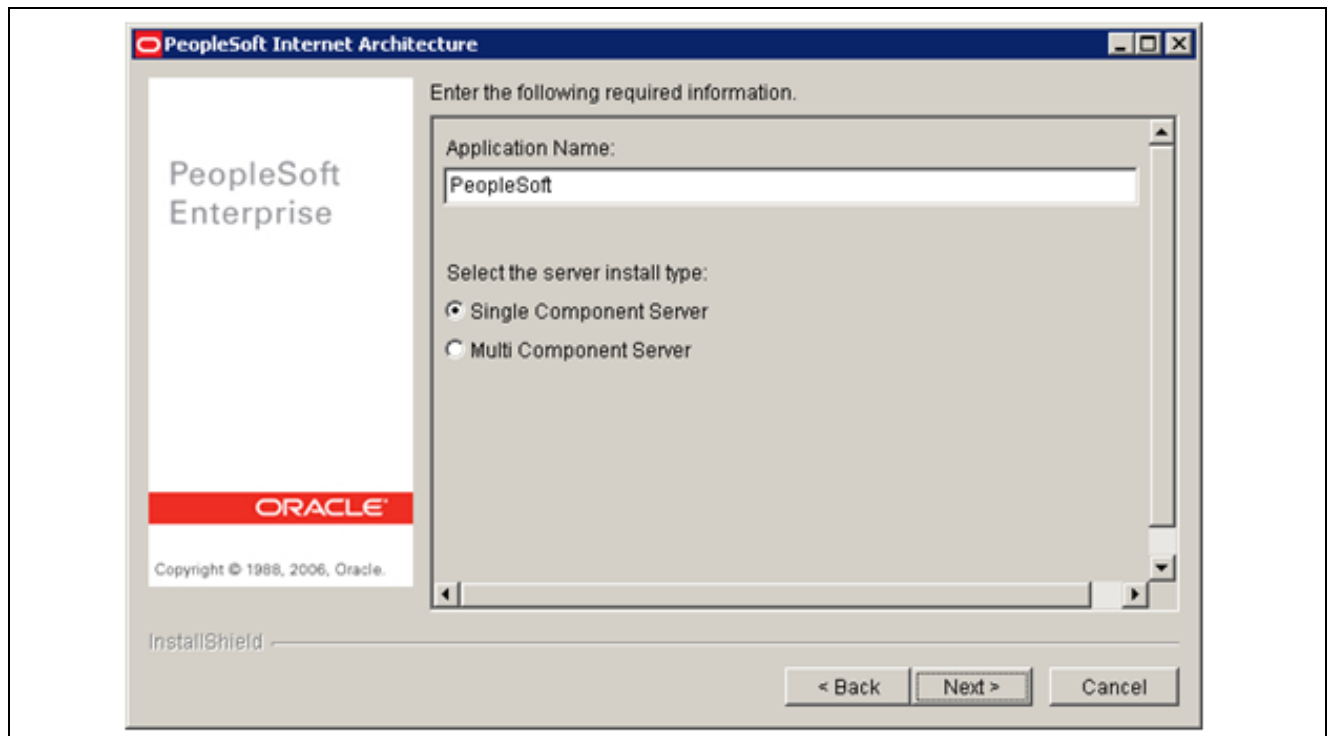
PeopleSoft InstallShield Wizard for PeopleSoft Internet Architecture - Welcome page

2. Click Next until the page with the option *Choose the setup type that best suits your needs* appears, and select Oracle Application Server.



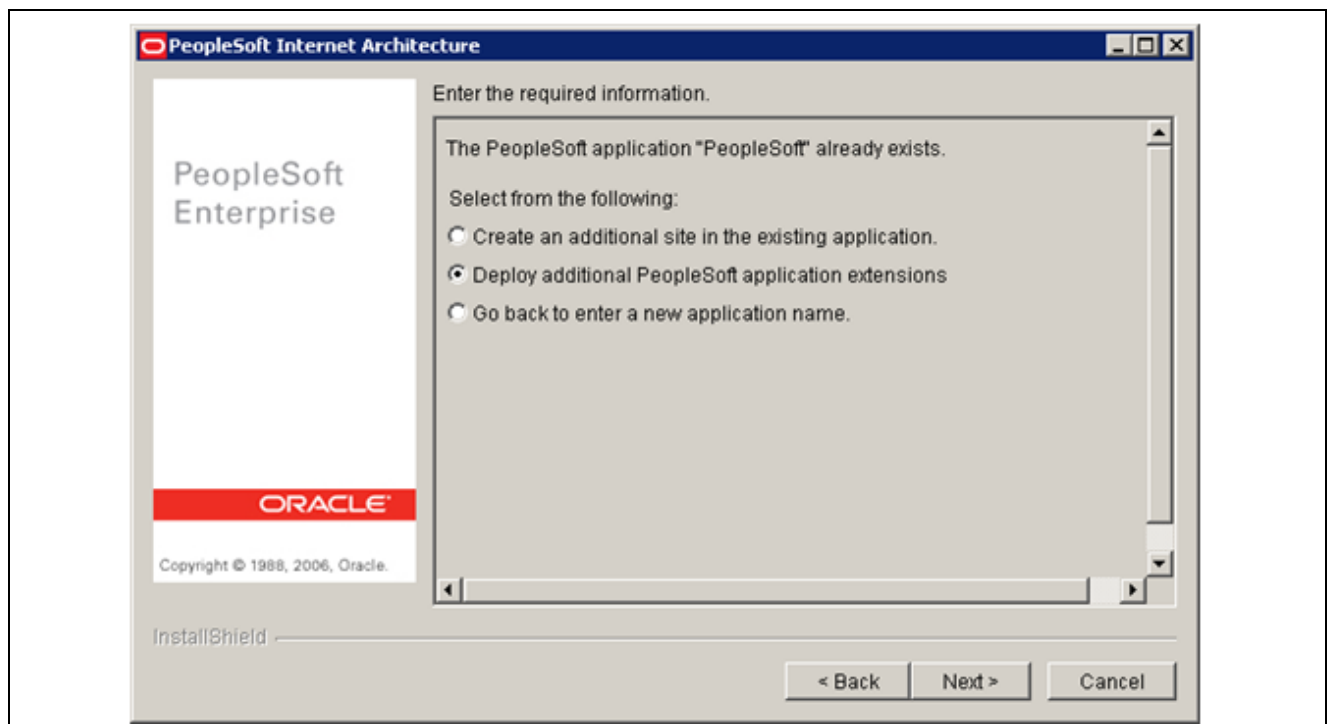
PeopleSoft InstallShield Wizard - Setup type server option page

3. Click Next until the page with the option *Enter the following required information* appears.



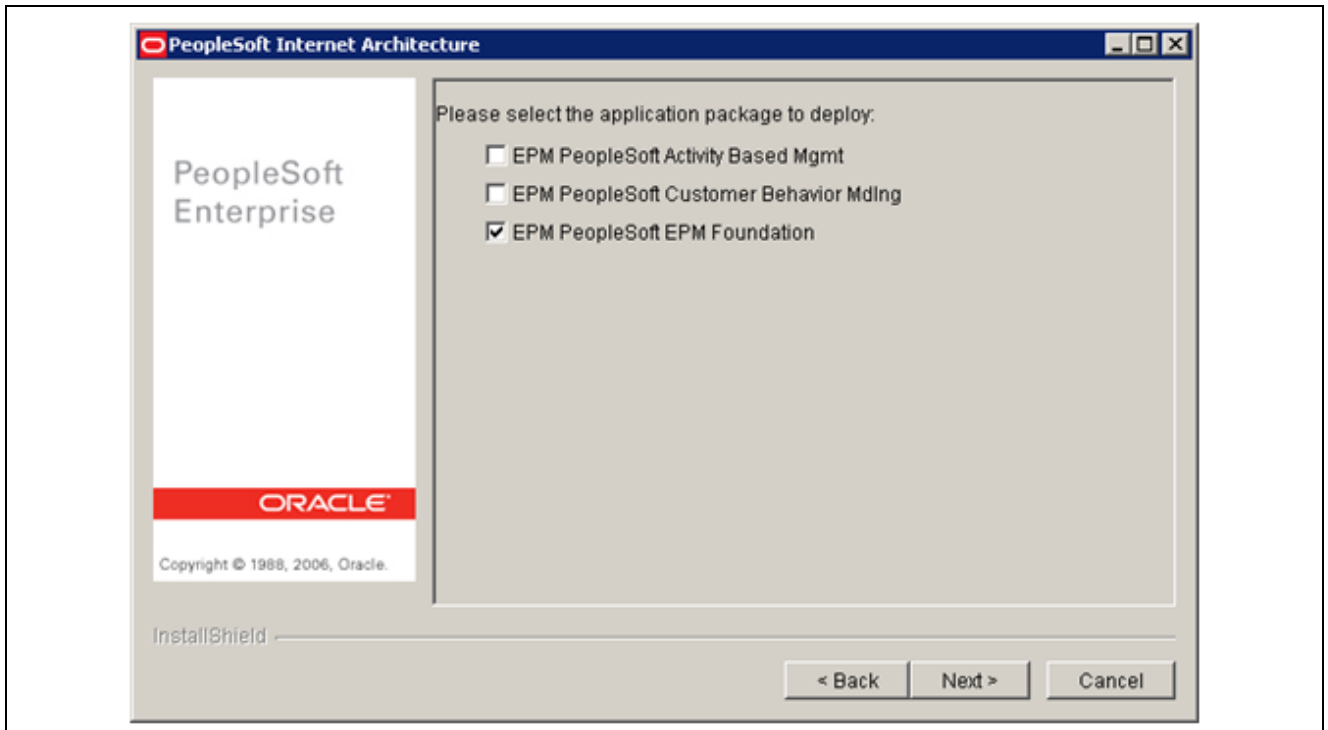
PeopleSoft InstallShield Wizard - Server install type option page

4. Click Next and on the page with the option *Enter the required information*, select Deploy additional PeopleSoft application extensions.



PeopleSoft InstallShield Wizard - Deploy additional PeopleSoft application extensions option selected

5. Click Next and on the page with the option *Please select the application package to deploy*, select the EPM PeopleSoft EPM Foundation check box.



PeopleSoft InstallShield Wizard - EPM PeopleSoft EPM Foundation option selected

Click Next to continue with the installation.

6. Select the EPM PeopleSoft Activity Based Management check box.

Click Next to continue with the installation and install the ABM Applets for Real Time and Model Analyzer.

7. After you successfully install PeopleSoft Pure Internet Architecture, you must verify that the PeopleSoft EPM chart files are extracted to the appropriate directories by the system.

The following directory structures use *PIA\_Application* as the Application name. Substitute your actual Application name for *PIA\_Application*.

The system extracts the following files:

- charts2.jar
- com.peoplesoft.epm.pf.applet.jar
- openviz2.jar
- Left.gif
- Right.gif

For Microsoft Windows, the system extracts the files to:

*OAS\_HOME\j2ee\PIA\_Application\applications\PIA\_Application\PORTAL\peoplesoft8\psepm\_pf.*

For UNIX, the system extracts the files to:

*OAS\_HOME/j2ee/PIA\_Application/applications/PIA\_Application/PORTAL/peoplesoft8/psepm\_pf*

8. After you successfully install PeopleSoft Pure Internet Architecture, you must verify that the PeopleSoft ABM Applet files are extracted to the appropriate directories by the system.

The following directory structures use *PIA\_Application* as the Application name. Substitute your actual Application name for *PIA\_Application*.

The system extracts the following files:

- com.peoplesoft.epm.ab.jar
- com.peoplsoft.epm.ab.applet.jar

For Microsoft Windows, the system extracts the com.peoplsoft.epm.ab.applet.jar file to:

*OAS\_HOME\j2ee\PIA\_Application\applications\PIA\_Application\PORTAL\peoplesoft8\psepm\_ab.*

For UNIX, the system extracts the files to:

*OAS\_HOME/j2ee/PIA\_Application/applications/PIA\_Application/PORTAL/peoplesoft8/psepm\_ab*

For Microsoft Windows, the system extracts the com.peoplsoft.epm.ab.jar file to:

*<OAS\_HOME>/class*

For UNIX, the system extracts the files to:

*<OAS\_HOME>/classes*

## Installing for an Oracle WebLogic 8.x Server

To install the charting tool for an Oracle WebLogic Server:

---

**Note.** These instructions use *PS\_HOME* for Microsoft Windows and *\$PS\_HOME* for UNIX platforms, to refer to the location to which PeopleSoft PeopleTools is installed on your machine. For example, C:\PT848. Substitute your actual PeopleSoft PeopleTools path for *PS\_HOME* for Microsoft Windows and *\$PS\_HOME* for UNIX platforms.

---

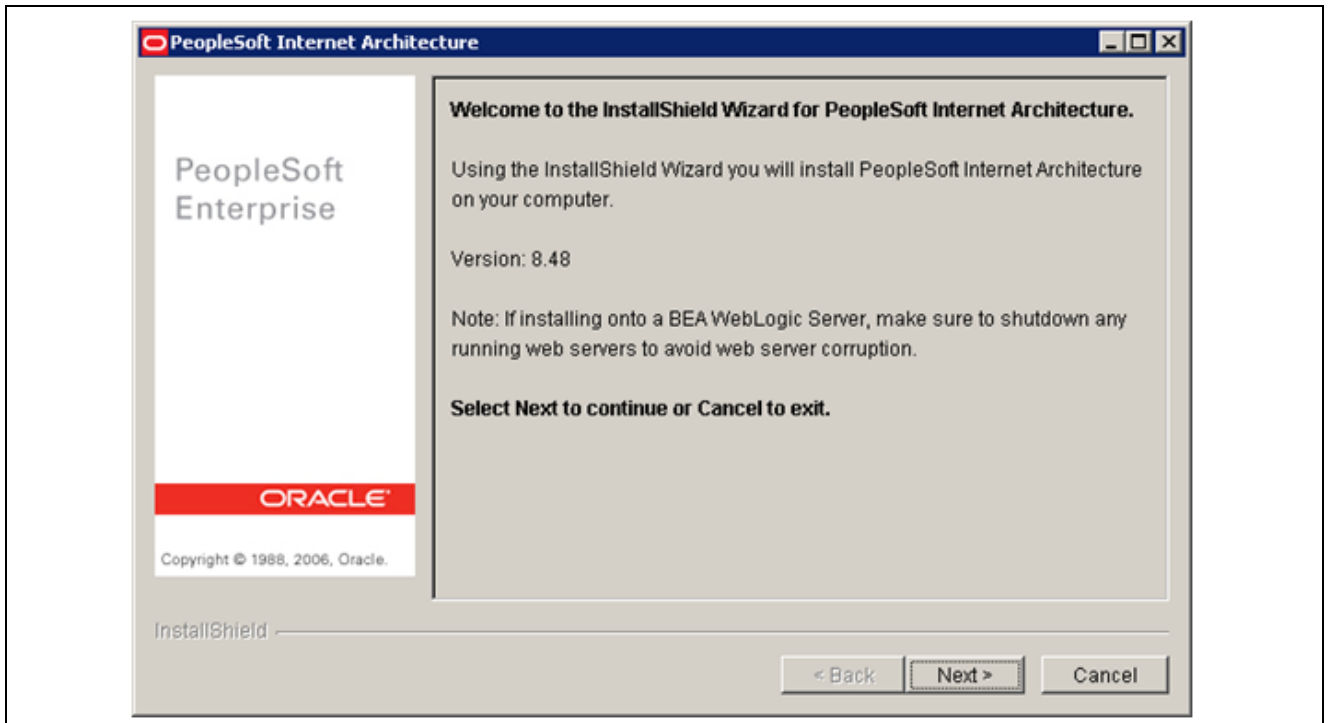
---

**Important!** Refer to the previous *Prerequisites* section for instructions specific to the installation of the PeopleSoft EPM Charting Tool (AVS) and ABM Applets when implementing PeopleSoft EPM 9.0 with PeopleSoft PeopleTools 8.49 Patch 04 and below.

---

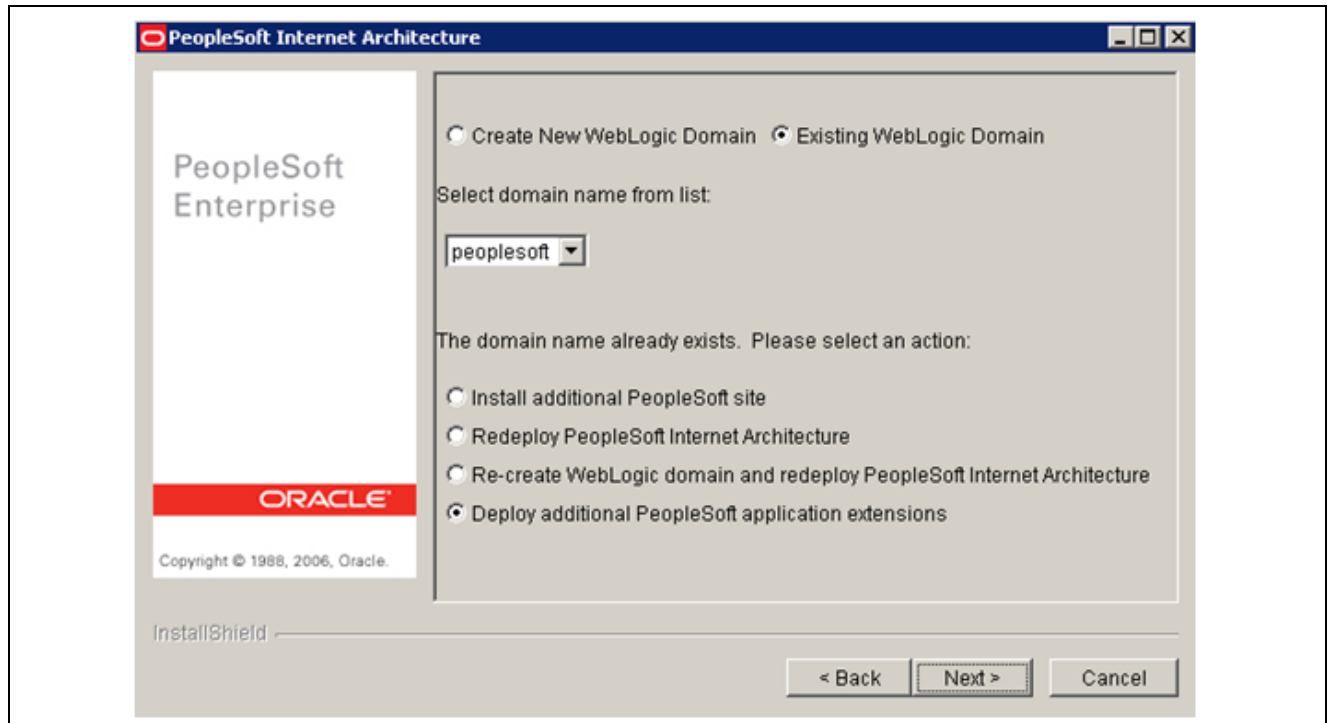
1. Launch the PeopleSoft Pure Internet Architecture Install/Configure utility by launching setup.exe or setup.jar, located in *PS\_HOME\setup\PsmPPIAInstall\* for Microsoft Windows or *\$PS\_HOME/setup/PsmPPIAInstall/* for UNIX.

The PeopleSoft Welcome to the InstallShield Wizard for PeopleSoft Internet Architecture page appears, displaying the PeopleSoft PeopleTools version:



PeopleSoft InstallShield Wizard - Welcome page

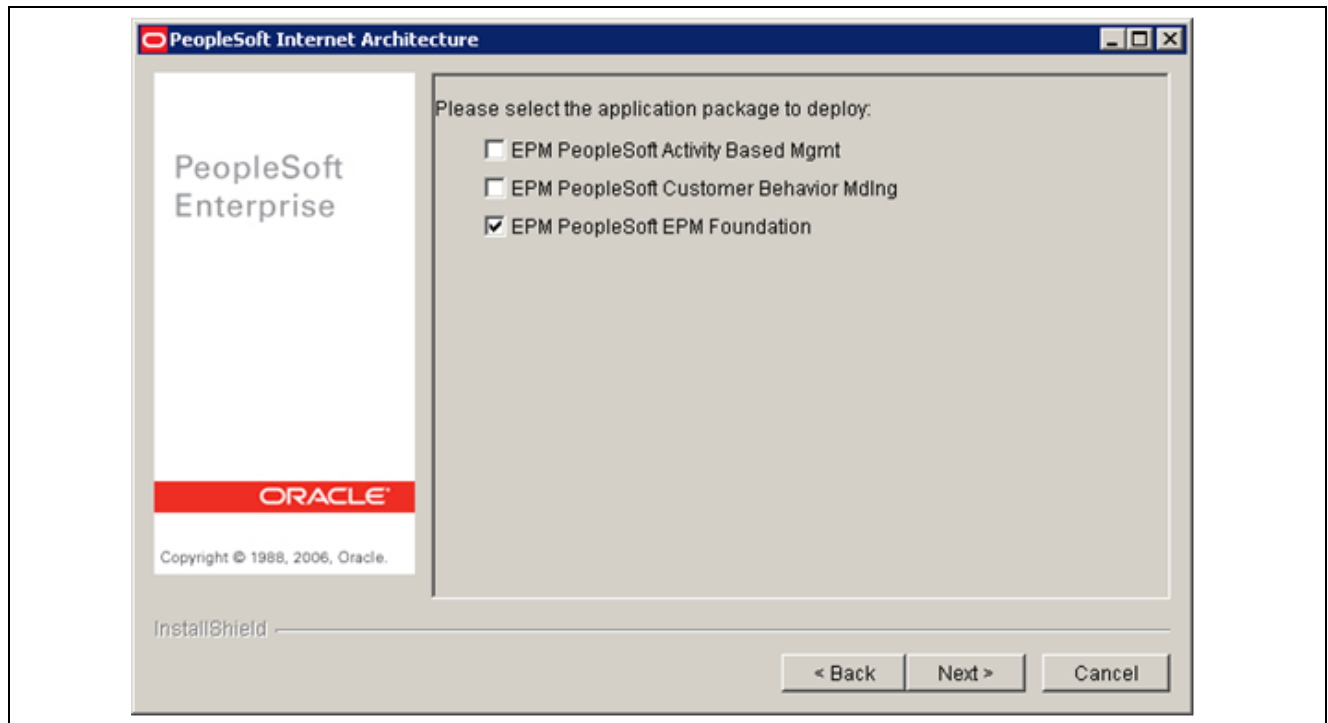
2. Click Next until the page with the option to *Choose the setup type* appears, and select BEA WebLogic Server.
3. Click Next until the page with the option to Create New WebLogic Domain or Existing WebLogic Domain appears.
4. Select the Existing WebLogic Domain and Deploy additional PeopleSoft application extensions options, and then click Next.



PeopleSoft InstallShield Wizard - Select an action for an existing domain options page

5. On the page with the option *Please select the application package to deploy*, select all of the check boxes as appropriate.

Click Next to continue with the installation.



PeopleSoft InstallShield Wizard - Select the application package to deploy options page

6. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft EPM chart files are extracted to the appropriate directories by the system.



The following directory structures use *PIA\_Domain* as the Application name. Substitute your actual Application name for *PIA\_Domain*.

The system extracts the following files:

- charts2.jar
- com.peoplesoft.epm.pf.applet.jar
- openviz2.jar
- Left.gif
- Right.gif

For Microsoft Windows for an Oracle WebLogic server on PeopleTools 8.49, the system extracts the files to:

*PS\_HOME*\webserv\*<PIA\_Domain>*\applications\peoplesoft\PORTAL\peoplesoft8\psepm\_pf.

For UNIX, the system extracts the files to:

*\$PS\_HOME*/webserv/*<PIA\_Domain>*/applications/peoplesoft/PORTAL/peoplesoft8/psepm\_pf

---

**Note.** For Microsoft Windows for an Oracle WebLogic server on PeopleTools 8.50, *PIA\_Domain* is replaced by peoplesoftWL in the path, as shown in the following example:

D:\pt850\webserv\peoplesoftWL\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm\_pf

So, for PeopleTools 8.50, the system extracts the com.peoplesoft.epm.pf.applet.jar file to:

*<PS\_HOME>*\webserv\*<PIA\_Domain>*\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm\_pf

---

7. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft ABM Applet files are extracted to the appropriate directories by the system.

The following directory structures use *PIA\_Domain* as the Application name. Substitute your actual Application name for *PIA\_Domain*.

The system extracts the com.peoplesoft.epm.ab.applet.jar file.

For Microsoft Windows for an Oracle WebLogic server on PeopleTools 8.49, the system extracts the com.peoplesoft.epm.ab.applet.jar file to:

*PS\_HOME*\webserv\*PIA\_Domain*\applications\peoplesoft\PORTAL\peoplesoft8\psepm\_ab

For UNIX, the system extracts the files to:

*\$PS\_HOME*/webserv/*PIA\_Domain*/applications/peoplesoft/PORTAL/peoplesoft8/psepm\_ab

---

**Note.** For Microsoft Windows for an Oracle WebLogic server on PeopleTools 8.50, *PIA\_Domain* is replaced by peoplesoftWL in the path, as shown in the following example:

D:\pt850\webserv\peoplesoftWL\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm\_ab

So, for PeopleTools 8.50, the system extracts the com.peoplesoft.epm.ab.applet.jar file to:

*<PS\_HOME>*\webserv\*<PIA\_Domain>*\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm\_ab

---

## Installing for an IBM WebSphere Server

To install the charting tool for an IBM WebSphere server:

---

**Note.** These instructions use <PS\_HOME> for MICROSOFT Windows and \$PS\_HOME for UNIX platforms to refer to the location to which PeopleSoft PeopleTools is installed on your machine, for example C:\PT848. Substitute your actual PeopleTools path for <PS\_HOME> for MICROSOFT Windows and \$PS\_HOME for UNIX platforms.

---

---

**Important!** Refer to the previous *Prerequisites* section for instructions specific to the installation of the PeopleSoft EPM Charting Tool (AVS) and ABM Applets when implementing PeopleSoft EPM 9.0 with PeopleSoft PeopleTools 8.49 Patch 04 and below.

---

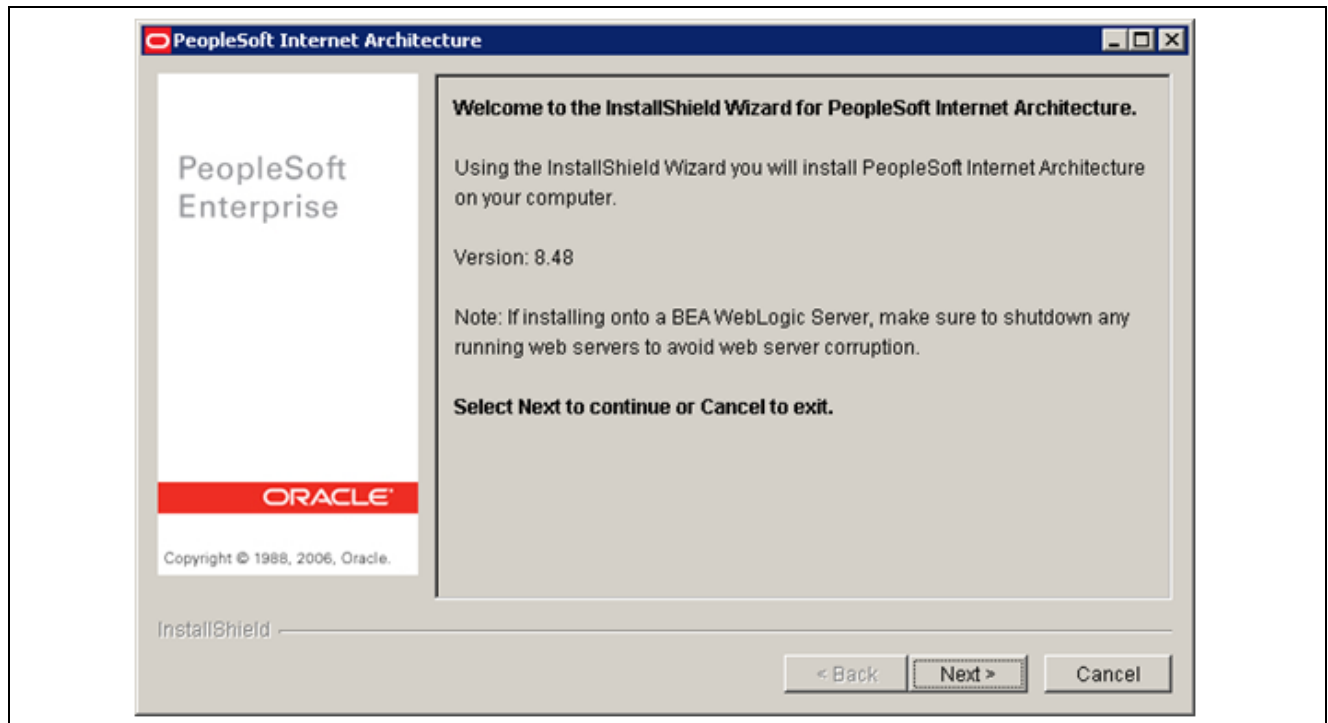
1. Launch the PeopleSoft Pure Internet Architecture Install and Configure utility by launching setup.exe or setup.jar, located in <PS\_HOME>\setup\PsmPIAInstall\ for Microsoft Windows or \$PS\_HOME/setup/PsmPIAInstall/ for UNIX.

The following page or a similar one appears and displays the version number that reflects the PeopleSoft PeopleTools version that you have installed.

---

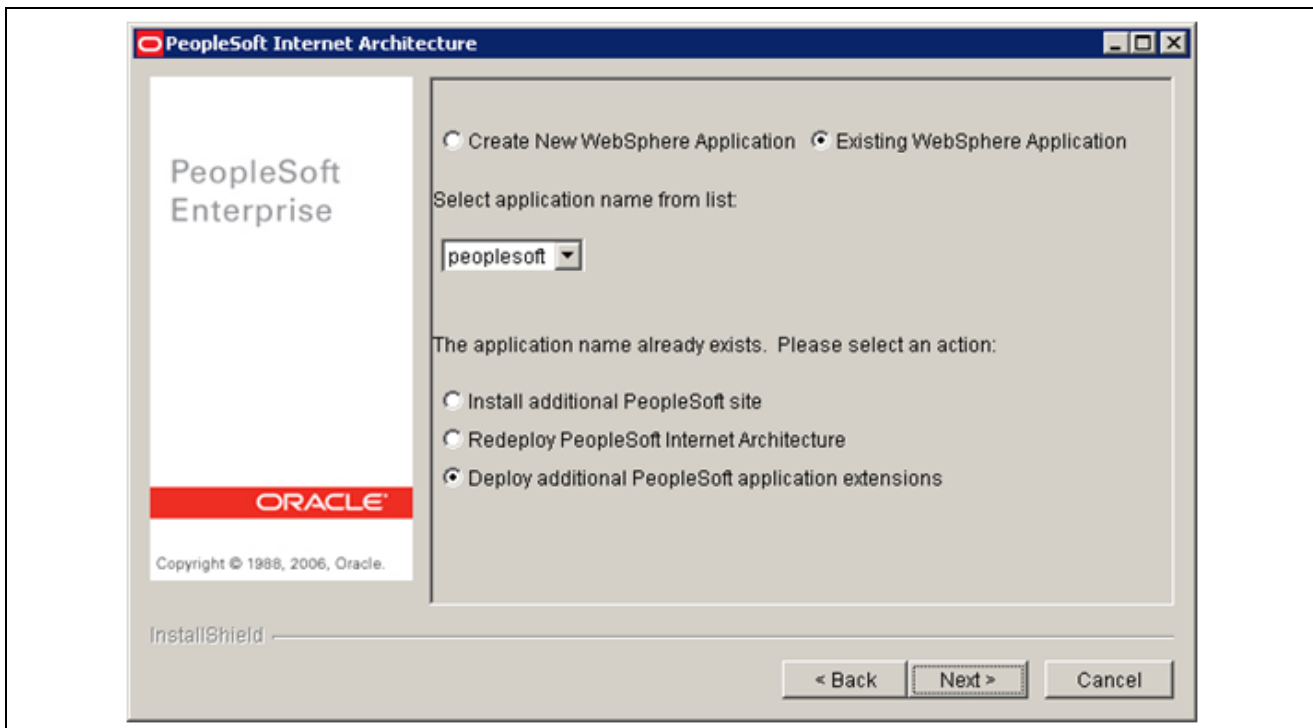
**Important!** Your installation of PeopleSoft PeopleTools 8.49 installed IBM WebSphere 6.x.

---



PeopleSoft InstallShield Wizard - Welcome page

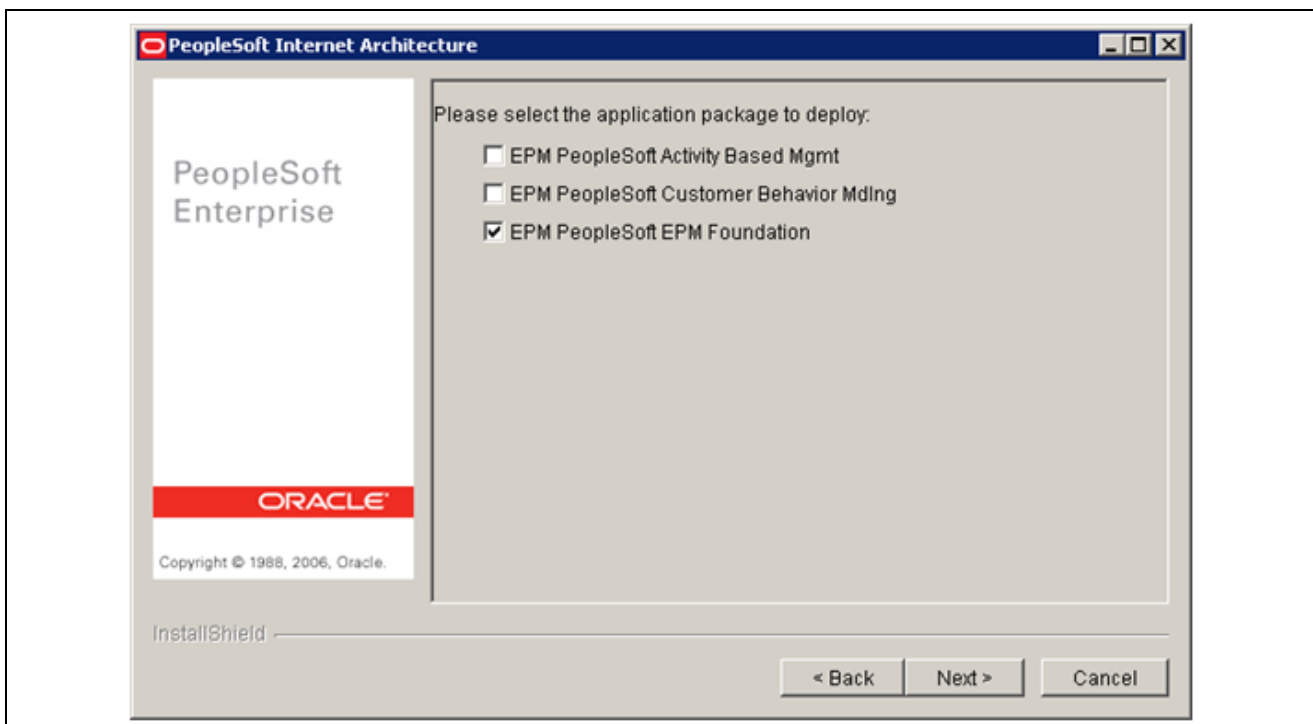
2. Click Next until the page with the option to Create New WebSphere Application or Existing WebSphere Application appears.



PeopleSoft InstallShield Wizard - Select an action for an existing domain options page

3. Select the Existing WebSphere Application and Deploy additional PeopleSoft application extensions options, and then click Next to continue.
4. On the page with the option Please select the application package to deploy, select all of the check boxes as appropriate.

Click Next to continue with the installation.



PeopleSoft InstallShield Wizard - Select the application package to deploy options page

5. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft EPM chart files are extracted to the appropriate directories by the system. The following directory structures use *<PIA\_Application>* as the Application name. Substitute your actual Application name for *<PIA\_Application>*.

The system extracts the following files:

- charts2.jar
- com.peoplesoft.epm.pf.applet.jar
- openviz2.jar
- Left.gif
- Right.gif

For Microsoft Windows for an IBM WebSphere server on PeopleTools 8.49, the system extracts the files to:

```
<PS_HOME>\websrv\myNode_myNode_Server1\<PIA_Application>\PORTAL\peoplesoft8\psepm_pf.
```

For UNIX, the system extracts the files to:

```
<$PS_HOME>/websrv/myNode_myNode_Server1/<PIA_Application>/PORTAL/peoplesoft8/psepm_pf
```

---

**Note.** For Microsoft Windows for an IBM WebSphere server on PeopleTools 8.50, *PIA\_Application* is replaced by *peoplesoftWAS* in the path, as shown in the following example:

```
D:\pt850\websrv\peoplesoftWAS\installedApps\peoplesoftWASNodeCell\peoplesoftWAS.ear\PORTAL.war\peoplesoft8\psepm_pf
```

So, for PeopleTools 8.50, the system extracts the *com.peoplesoft.epm.pf.applet.jar* file to:

```
<PS_HOME>\websrv\PIA_Application\installedApps\PIA_ApplicationNodeCell\PIA_Application.ear\PORTAL.war\peoplesoft8\psepm_pf
```

---

6. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft ABM Applet files are extracted to the appropriate directories by the system.

The following directory structures use *PIA\_Domain* as the Application name. Substitute your actual Application name for *PIA\_Domain*.

The system extracts the *com.peoplesoft.epm.ab.applet.jar* file.

For Microsoft Windows for an IBM WebSphere server on PeopleTools 8.49, the system extracts the *com.peoplesoft.epm.ab.applet.jar* file to:

```
<PS_HOME>\websrv\peoplesoft\applications\peoplesoft\PORTAL\peoplesoft8\psepm_ab
```

For UNIX, the system extracts the files to:

```
<$PS_HOME>/websrv/peoplesoft/applications/peoplesoft/PORTAL/peoplesoft8/psepm_ab
```

---

**Note.** For Microsoft Windows for an IBM WebSphere server on PeopleTools 8.50, PIA\_Application is replaced by peoplesoftWAS in the path, as shown in the following example:

D:\pt850\webserv\peoplesoftWAS\installedApps\peoplesoftWASNodeCell\peoplesoftWAS.ear  
 \PORTAL.war\peoplesoft8\psepm\_ab

So, for PeopleTools 8.50, the system extracts the com.peoplesoft.epm.ab.applet.jar file to:

<PS\_HOME>\webserv\PIA\_Application\installedApps\PIA\_ApplicationNodeCell\PIA\_Application.ear  
 \PORTAL.war\peoplesoft8\psepm\_ab

---

## Task 1-12-2: Configuring PeopleSoft Applications to Enable Charting

To configure the applications to use the charting tool:

1. Select EPM Foundation, EPM Setup, Installation Analysis & Options, Installation Options.
2. Select the Web Services tab.
3. Ensure that the Chart Server check box is selected to enable the basic charting features.

PeopleSoft Enterprise Scorecard and PeopleSoft Enterprise Activity-Based Management use applets to provide enhanced charting abilities.

To enable these advanced features:

1. On the Web Services tab, select the Applets check box.  
 Be aware, however, that applets download code to the client workstation.
2. Save the page.
3. Log out of the application.

Installation Options - Web Services page

---

## Task 1-13: Installing and Configuring PeopleSoft Enterprise Planning and Budgeting

PeopleSoft Enterprise Planning and Budgeting uses the PeopleSoft PeopleTools Analytic Calculation Engine (ACE) as the primary calculation tool for planning models. PeopleSoft ACE is installed during the normal installation process for PeopleTools. Configuration of the ACE components may be necessary to optimize your environment.

For more information about the administration of the analytic servers that are used by PeopleSoft ACE, refer to the PeopleSoft PeopleTools System and Server Administration PeopleBook (for your database platform), “Managing Analytic Servers.”

---

## Task 1-14: Installing the PeopleSoft Planning and Budgeting Spreadsheet Add-In Program

This section discusses:

- Defining Software Requirements
- Installing the PeopleSoft BP-Spreadsheet Add-In Program
- Verifying the Installation of the PeopleSoft BP-Spreadsheet Add-In Program
- Reviewing Troubleshooting Tips

The PeopleSoft Planning and Budgeting spreadsheet add-in program consists of a single Microsoft Excel file, ExcelToCI-BP.xls. This spreadsheet must be available on all machines that plan to use the Spreadsheet Add-In program to work with the PeopleSoft Planning and Budgeting application. The file ExcelToCI-BP.xls resides on the File server at:

<PS\_HOME>\excel\ExcelToCI-BP.xls

### Defining Software Requirements

The PeopleSoft Planning and Budgeting Spreadsheet Add-In utility is available only for Microsoft Office and specifically needs the Microsoft XML parser, msxml4.dll. This utility supports the same versions of Microsoft Office as are supported by PeopleSoft PeopleTools.

Some applications overwrite previous versions of this file with another version, occasionally causing the utility not to function properly. You should use MSXML version 4, Service Pack 2, because it can coexist with older versions of the parser.

The following required software must be installed for the spreadsheet add-in to work successfully:

- MSXML version 4, Service Pack 2. Microsoft XML parser MSXML.

You can download and reinstall this software from the Microsoft website, located at:

<http://www.microsoft.com/downloads/>

- Visual Basic 6.0 SP5: Run-Time Redistribution.

You can install this software from the Microsoft website, located at:

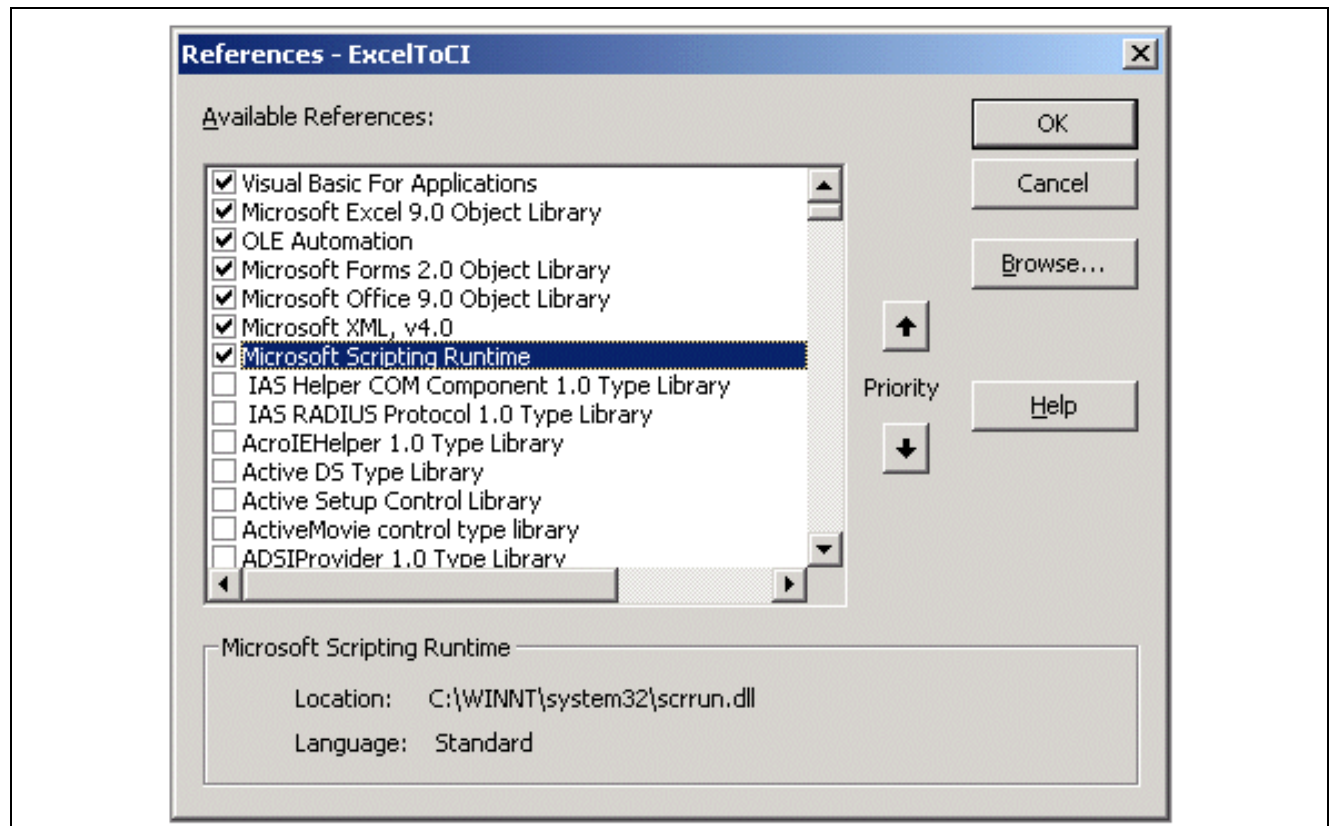
<http://www.microsoft.com/downloads/>

See the Microsoft downloads website for more information on these service packs.

## Task 1-14-1: Installing the PeopleSoft BP-Spreadsheet Add-In Program

To install the PeopleSoft BP-Spreadsheet Add-In program:

1. Copy the file ExcelToCI-BP.xls from the File server to the directory, C:\peoplesoft-apps\bg\ on the user machine or the standard PeopleSoft directory C:\PS\_HOME\bg\ if it exists.
2. Create a shortcut on the desktop and name it “BP-SpreadsheetAdd-In” for launching the PeopleSoft BP-Spreadsheet Add-In program.
3. Launch the PeopleSoft BP-Spreadsheet Add-In program to open the workbook.
4. From the Tools menu, select Macro, Security, and then click the Security Level tab.  
Ensure that the macro security level option is set to either *Medium* or *Low*.
5. From the Tools menu, select Macros, Visual Basic Editor to open the Visual Basic editor.
6. In the Visual Basic editor, open the Tools menu and then select References to display the dialog, as shown in the example that follows.
7. The following check boxes in the Available References list box must be selected:
  - Visual Basic For Applications
  - Microsoft Excel 9.0 Object Library
  - OLE Automation
  - Microsoft Forms 2.0 Object Library
  - Microsoft Office 9.0 Object Library
  - Microsoft XML, v4.0
  - Microsoft Scripting Runtime
8. The version number on the Available References should either match or be greater than the numbers shown in this example:



ExcelToCI - Available References dialog box

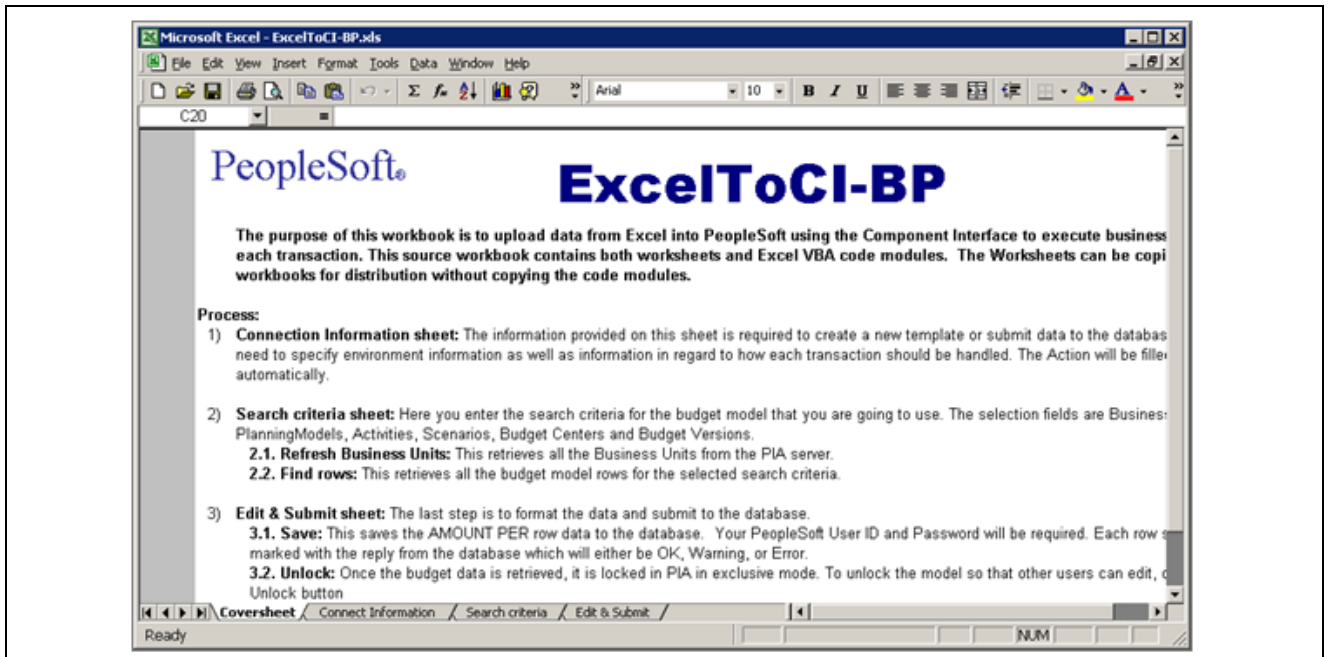
## Task 1-14-2: Verifying the Installation of the PeopleSoft BP-Spreadsheet Add-In Program

To verify the installation of the spreadsheet add-in file:

1. Double-click the desktop BP-SpreadsheetAdd-In icon to open the Excel workbook with the PeopleSoft Planning and Budgeting add-in program worksheets, and then click the Enable Macros button if it appears.

The workbook must have the following worksheets:





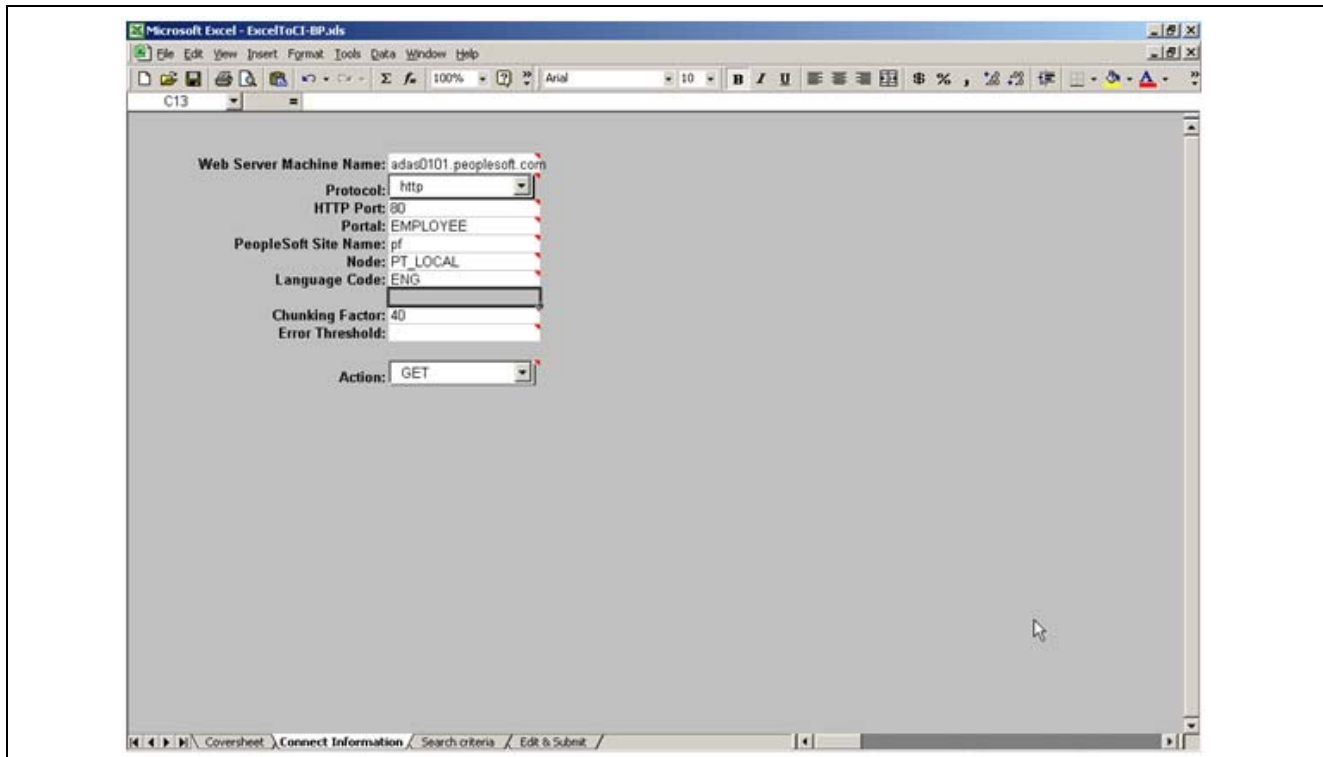
Microsoft Excel - ExcelToCI-BP.xls workbook containing the required worksheets

- Coversheet
- Connect Information
- Template

The Template sheet is hidden. This is for internal use by the ExceltoCI program for metadata purposes. For the purpose of this document, the Template sheet displays in some of the images.

- Search Criteria
- Edit & Submit

2. Enter the following fields on the Connect Information sheet to point to a PeopleSoft Pur Internet Architecture server:



Microsoft Excel - ExcelToCI-BP.xls - Connect Information sheet displaying required fields

- a. WebServer Machine Name – The name of the PeopleSoft Web server that you plan to use.  
For example, in the previous connect sheet: *adas0101.peoplesoft.com*
- b. Protocol – The protocol that is used to access the web server.  
The default is *http*. The preferred protocol is *https*.
- c. HTTP Port – The HTTP port number that the web server uses.  
The default is *80*.
- d. Portal – The name of the portal that you are using.  
*EMPLOYEE* is a default portal that ships with PeopleSoft
- e. PeopleSoft Site Name – The PeopleSoft site name that you defined during the installation of PeopleSoft Pure Internet Architecture.  
For example, in the previous Connect sheet: *pf*

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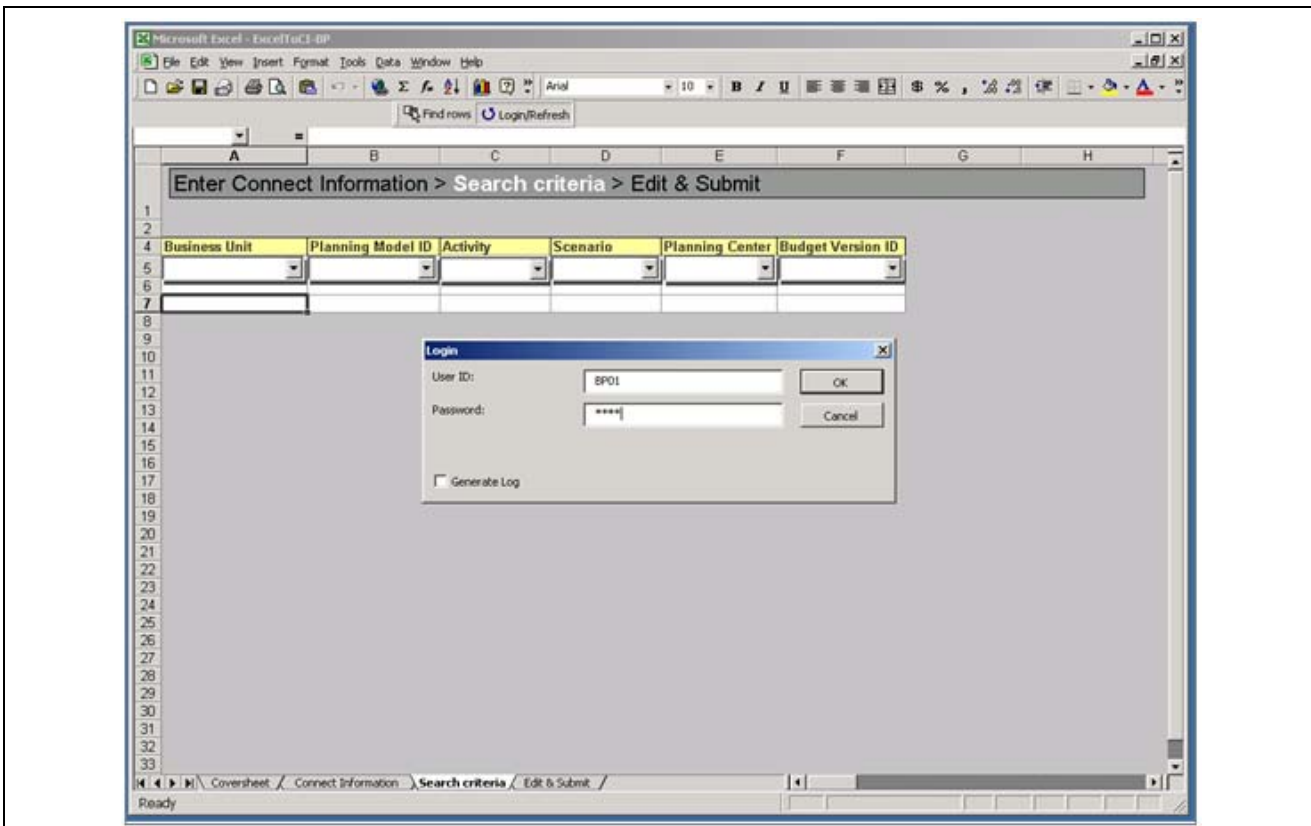
**Note.** The PeopleSoft Site Name field is case sensitive.

---

- f. Node — The PeopleSoft default local node name.  
For example, in the previous Connect sheet: *PT\_LOCAL*  
To determine the PeopleSoft default local node, select PeopleTools, Integration Broker, Integration Setup, Nodes. Click Search to locate the node name with Default Local Node equal to Y.
- g. Language Code – The language code for the language that you have installed.
- h. Chunking Factor – The chunking factor that you desire.
- i. Error Threshold – The threshold at which you want to set for errors.

- j. Action – The action that you want taken when the error threshold is exceeded.
- 3. On the Search Criteria sheet, click the Login/Refresh button and enter the PeopleSoft user name and password in the Login dialog box.

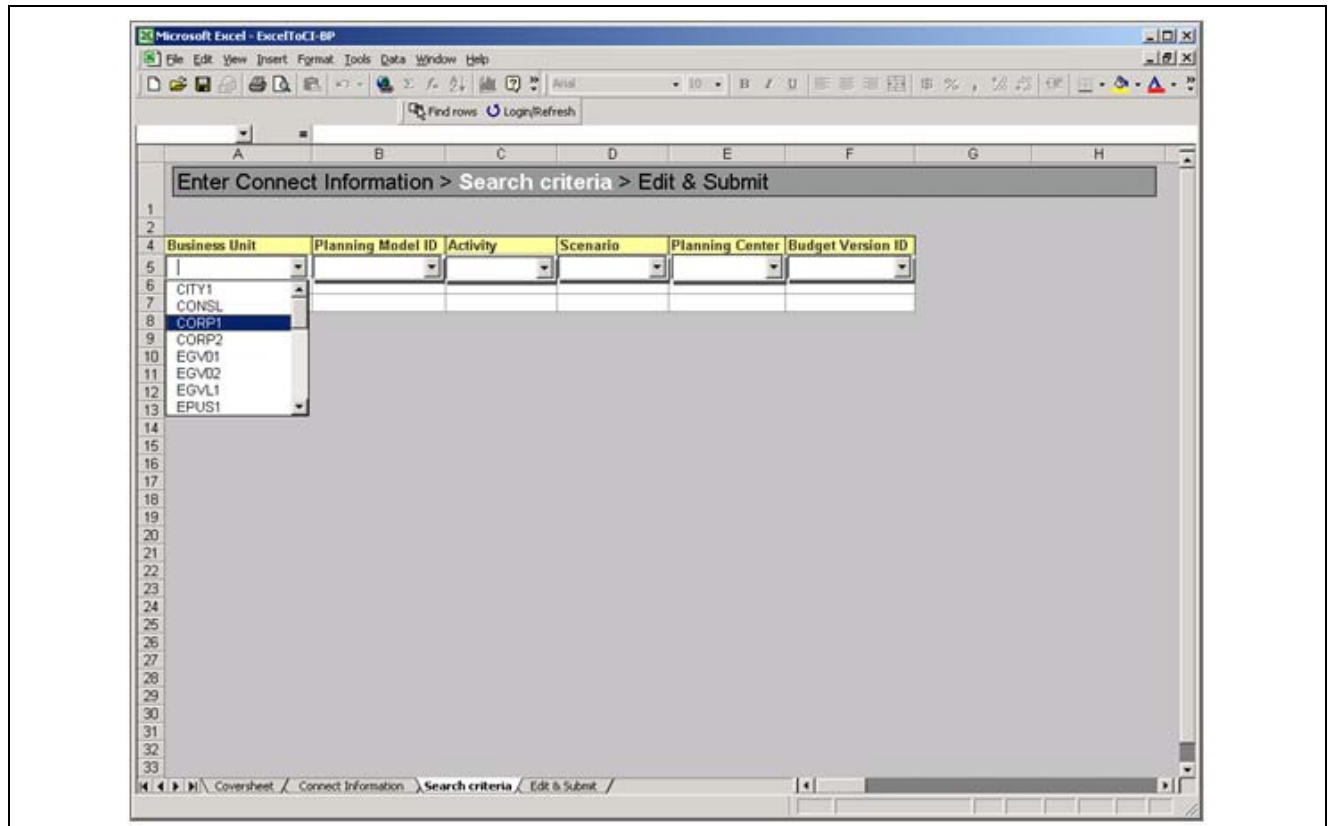
For example, you can use *BP01/BP01* as the user name and password.



Microsoft Excel - ExcelToCI-BP.xls - Search Criteria sheet and Login dialog box

- 4. Click OK.

The Business Unit list box displays a list of business units, as shown in the following example (your list of values may differ):



Microsoft Excel - ExcelToCI-BP.xls - Search Criteria sheet displaying the Business Unit combo box

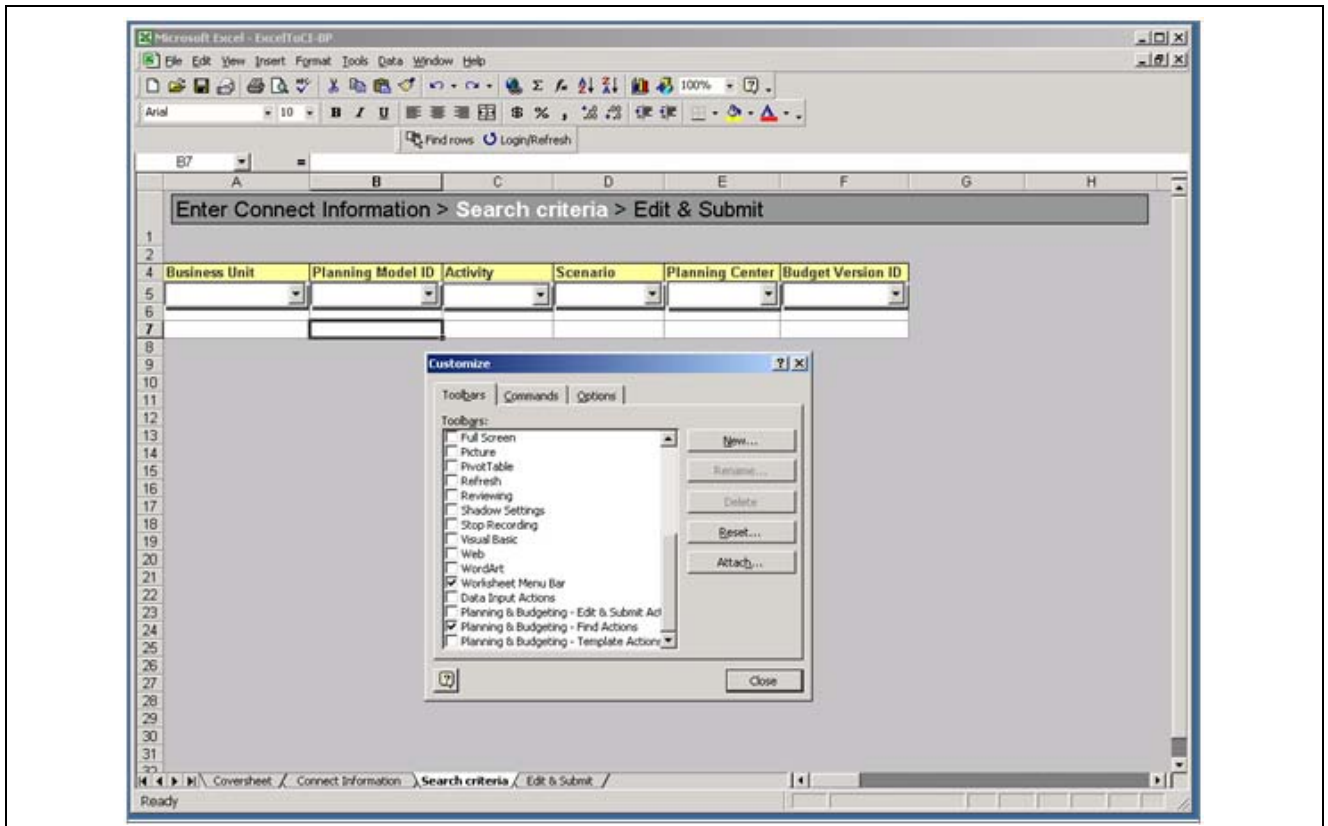
5. In Microsoft Excel, select Tools, Customize to open the Customize dialog box.
6. In the Toolbars list, ensure that the following toolbars exist:

---

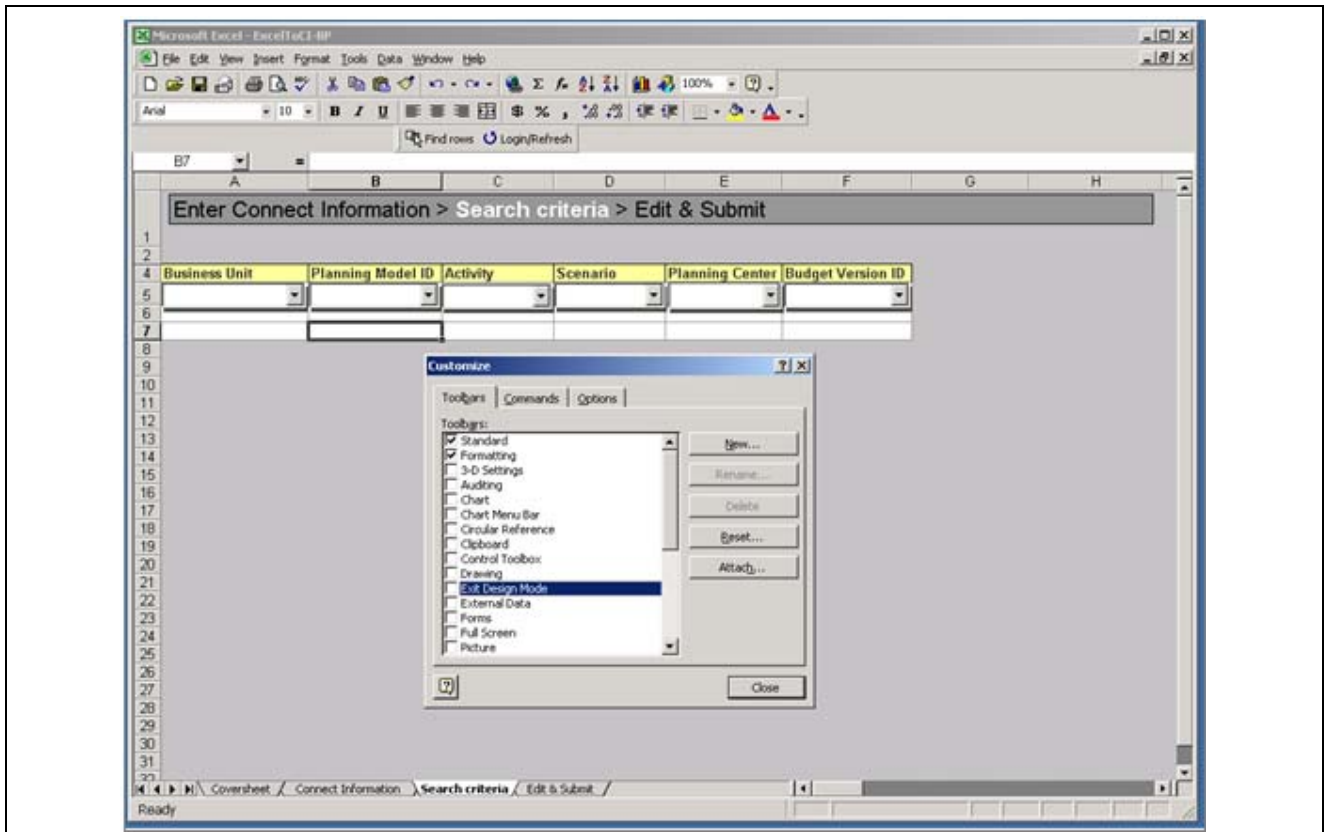
**Note.** The toolbars item check boxes displayed in the list do not need to be on.

---

- Planning & Budgeting – Edit & Submit Actions
  - Planning & Budgeting – Find Actions
  - Planning & Budgeting – Template Actions
7. Ensure that the Exit Design Mode toolbar item check box is *not* selected.  
Clear the Exit Design Mode toolbar item check box, if it is selected.



Microsoft Excel - ExcelToCI-BP.xls - Search Criteria sheet showing the Toolbars dialog box and options



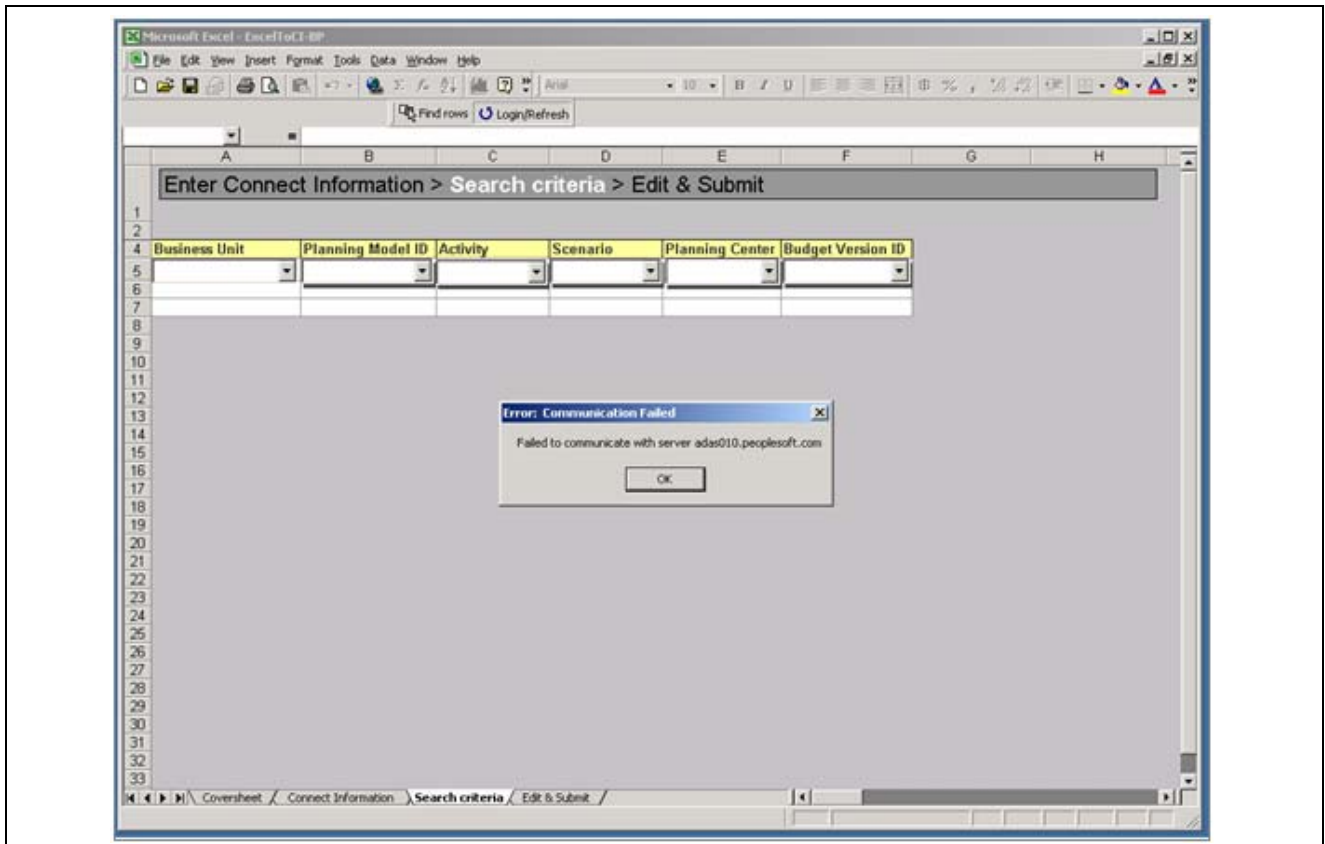
Microsoft Excel - ExcelToCI-BP.xls - Search Criteria sheet showing the Exit Design Mode option highlighted

8. After you have configured the previous settings, click Save, and then exit and re-open the workbook to verify that your changes took effect.

## Task 1-14-3: Reviewing Troubleshooting Tips

This section briefly discusses the most common errors and provides information on how to resolve them.

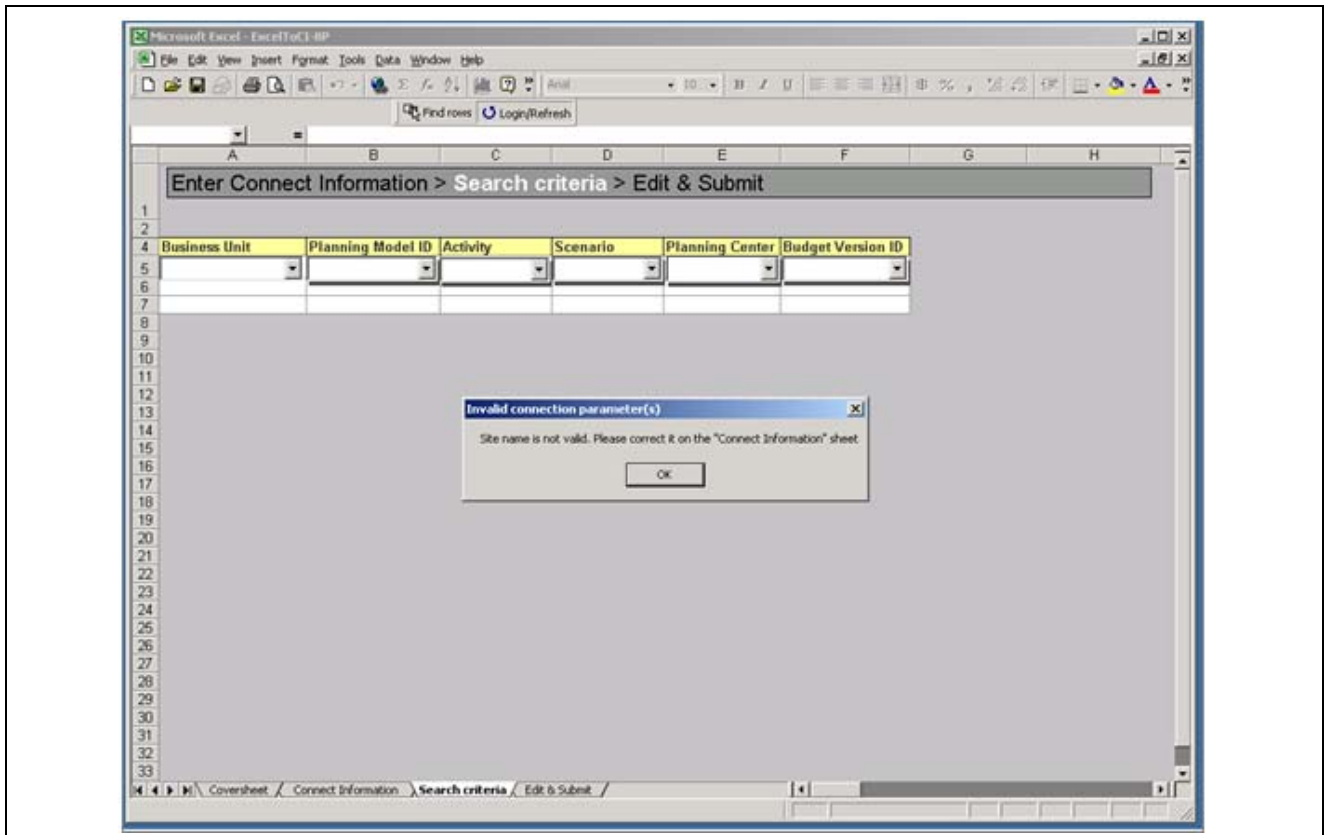
Problem: Message dialog box displays *Failed to communicate with server* on an action like Login/Refresh.



Microsoft Excel - ExcelToCI-BP - Failed to communicate with server error message

Solution: Verify that the Web Server Machine Name field on the Connect sheet is correct, and ensure that the Web server is up and running.

Problem: Message dialog box displays *The response text is not valid XML* when the Login/Refresh button is clicked.

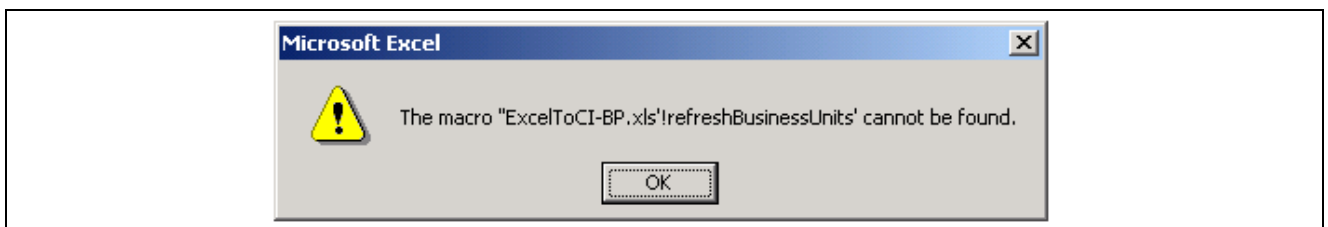


Microsoft Excel - ExcelToCI-BP - Site name is not valid error message

Solution: Verify that the PeopleSoft Site Name field on the Connect sheet is correct.

**Note.** The site name is case sensitive, so make sure that the letters are in the proper case.

Problem: In the Search Criteria sheet, when the Login/Refresh button is clicked, a message dialog with following text appears: *The macro "ExcelToCI-BP.xls"!refreshBusinessUnits' cannot be found.*

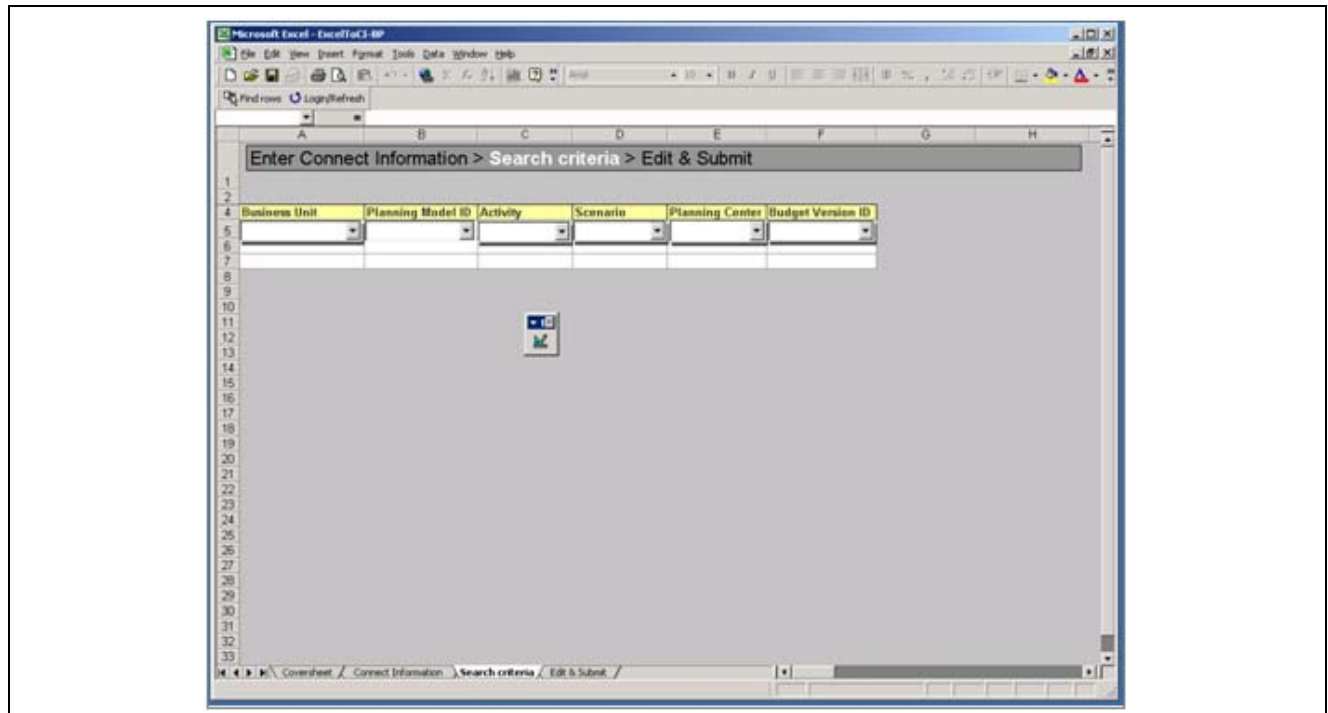


Microsoft Excel - ExcelToCI-BP - The macro "ExcelToCI-BP!refreshBusinessUnits' cannot be found error message

Solution: This is due to the macro security level option set to *High* in Microsoft Excel. In Microsoft Excel, select Tools, Macro, Security to open a dialog box. In the Security Level tab, select either the Medium or Low option to correct this issue.

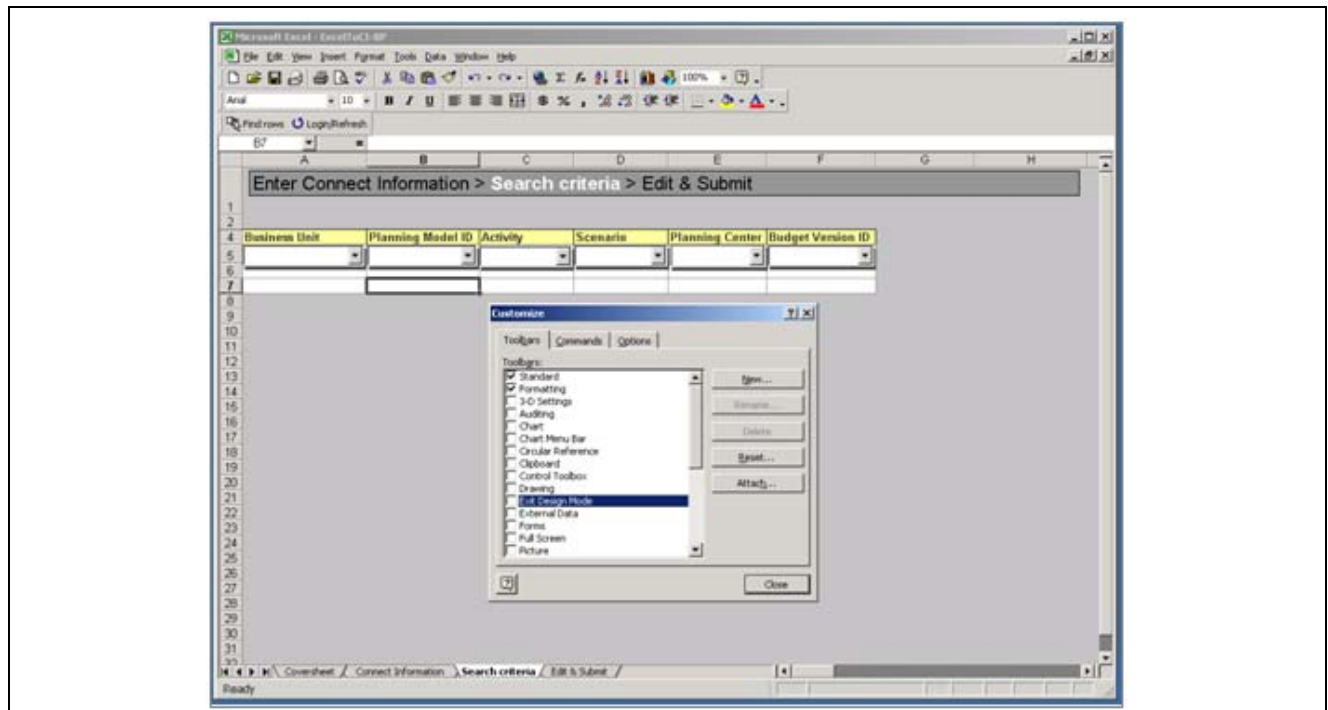
Problem: The workbook is in *Design Mode*. The design model toolbar displays, as in the following example:





Microsoft Excel - ExcelToCI-BP - Search Criteria sheet displaying the Design Mode icon

Solution: In Microsoft Excel, select Tools, Customize and open the Customize dialog box. In the toolbars list box, clear the Exit Design Mode toolbar check box, as shown in the following example. Then click Save, exit Microsoft Excel, and then re-open the workbook to verify your changes.



Microsoft Excel - ExcelToCI-BP - Search Criteria sheet showing Toolbars dialog box with Exit Design Mode cleared



## CHAPTER 2

# Installing and Configuring Ascential DataStage

This chapter discusses:

- Prerequisites
- Preparing for the Installation
- Upgrading Previous Ascential DataStage Releases
- Installing Ascential DataStage Server on Microsoft Windows
- Installing the Ascential DataStage Server on UNIX
- Running the Ascential DataStage Server on a Non-Default Port (Optional)
- Installing the Ascential DataStage Clients
- Configuring the Ascential DataStage Server for Multiple Database Platforms
- Creating the Ascential DataStage Projects
- Configuring Environmental Parameters
- Importing the .DSX Files

This chapter provides instructions for installing and configuring Ascential DataStage 7.5.2. Oracle's PeopleSoft Enterprise Performance Management (EPM) applications use Ascential DataStage as a data integration tool.

These instructions explain how to install and configure Ascential DataStage server and clients on Microsoft Windows or OpenGroup UNIX in a development environment. The installation for Ascential DataStage clients is common to all platforms, but the Ascential DataStage server installation differs according to the type of server (Microsoft Windows or UNIX). If you are installing on Microsoft Windows, you can install the Ascential DataStage server and clients on the same Microsoft Windows system or separate systems. You can also install the client software on a number of systems that connect to the server that is on a standalone system.

The server software needs to be installed on the machine that you plan to use to run the Ascential jobs. Ideally, this machine will be the same as for the Process Scheduler. In addition, you must install the necessary software to establish connectivity to the database on the server for Ascential DataStage to interact with the database at runtime.

---

**Note.** The installation tasks in this chapter describe how to set up a development system, but they may not be suitable for production. The install documentation that Ascential delivers along with the Ascential DataStage software provides a thorough discussion of how to install and configure Ascential DataStage.

---

To access the documentation that Ascential provides with the Ascential DataStage installation software, insert the installation CD for your database platform and select DataStage Client, Docs, ENU, books. Open the *dsbooks.pdf* for a list of manuals that Ascential includes. Additionally, you can open the *dsupgde.pdf* for details about the Ascential DataStage installation process.

See *Ascential DataStage Install and Upgrade Guide*(*dsupgde.pdf*), for details on installing Ascential DataStage.

---

**Note.** The *Ascential DataStage Install and Upgrade Guide* also contains instructions for upgrading an existing installation.

---

## Prerequisites

This section discusses:

- Accessing PeopleSoft EPM Warehouse 9.0 Documentation
- Ascential DataStage Documentation

Oracle recommends that you read the following PeopleSoft and Ascential DataStage documentation before you begin installing and configuring the Ascential DataStage environment.

### Accessing PeopleSoft EPM Warehouse 9.0 Documentation

You can access the PeopleSoft EPM Warehouse documentation from Oracle's PeopleSoft Customer Connection website.

See *PeopleSoft Enterprise Performance Management Warehouse 9.0 PeopleBook*, "'Understanding the Multidimensional Warehouse.'"'

See *PeopleSoft Enterprise Performance Management Warehouse 9.0 PeopleBook*, "'Loading Data into the Multidimensional Warehouse.'"'

### Ascential DataStage Documentation

You can access the Ascential DataStage online documentation as follows:

From your Start Menu, select Programs, Ascential DataStage, Online Manuals, DataStage Documentation. The page that appears lists the available documents. Review these documents before you begin the configuration:

- *DataStage Install and Upgrade Guide*
- *DataStage Administrator Guide*
- *DataStage Manager Guide*
- *DataStage Designer Guide*
- *DataStage Director Guide*

---

## Task 2-1: Preparing for the Installation

This table provides the installation requirements.

Requirements	Microsoft Windows	UNIX
Install User Requirements	User must have Local Administrator rights to install.	User must be root to install if you are using the recommended root install. Details on non-root installs are provided later in this document.

Requirements	Microsoft Windows	UNIX
Ascential DataStage Server Requirements	<p>Operating system:</p> <ul style="list-style-type: none"> <li>• Microsoft Windows 2000 SP4 or later (Professional, Server, Advanced Server).</li> <li>• Microsoft Windows 2003 (Standard, Enterprise).</li> <li>• A minimum of 256 MB free memory.</li> </ul>	<ul style="list-style-type: none"> <li>• Sun Solaris 2.8, 2.9, 2.10</li> <li>• IBM AIX 5.1, 5.2, 5.3</li> <li>• HP-UX 11.11i (11.11) for PS-RISC</li> <li>• HP-UX 11iv2 (11.23) for Itanium</li> <li>• RedHat Linux Advanced Server 3.0</li> <li>• SUSE Linux Enterprise Server 9</li> </ul>
Ascential DataStage Client Requirements	<p>Operating system:</p> <ul style="list-style-type: none"> <li>• Microsoft Windows 2000 SP4 or later.</li> <li>• Microsoft Windows XP Professional Service Pack 1.</li> <li>• Microsoft Internet Explorer 5.01 SP2 or later.</li> <li>• Minimum screen resolution of 800 x 600 or better with True Color (24-bit).</li> <li>• Minimum of 128 MB free memory.</li> <li>• .NET framework v1.1 (provided by Ascential installer).</li> </ul>	N/A
Server Disk Minimum Requirements	<ul style="list-style-type: none"> <li>• 80 MB to install the Ascential DataStage server.</li> <li>• 4.5 MB per project to install the Ascential DataStage server.</li> <li>• 2.2 MB in the Microsoft Windows system32 directory.</li> <li>• Sufficient storage space for any data to be held in Ascential DataStage tables or files (see the following information).</li> </ul>	<ul style="list-style-type: none"> <li>• 425 MB to install the Ascential DataStage server.</li> <li>• 500 MB temporary storage during install to unpack components.</li> <li>• 3 MB per project to install Ascential DataStage server.</li> <li>• 25 MB of free space in /var.</li> </ul>

Requirements	Microsoft Windows	UNIX
Client Disk Minimum Requirements	<ul style="list-style-type: none"> <li>• 10 MB in the Microsoft Windows 2000 or Microsoft Windows XP system32 directory.</li> <li>• 200 MB in the Ascential DataStage install directory for Ascential DataStage clients and documentation (typical installation).</li> <li>• Additional space to allow for temporary data storage while an Ascential DataStage job is running.</li> </ul>	N/A
Open Server Ports	<ul style="list-style-type: none"> <li>• 31538/TCP: DSEngine rpc daemon</li> <li>• 23/TCP: DataStage Telnet Service</li> </ul>	31538/TCP: DSEngine rpc daemon

## Task 2-2: Upgrading Previous Ascential DataStage Releases

If you are upgrading an existing Ascential DataStage installation on a Microsoft Windows or UNIX system, follow the instructions in the corresponding chapter.

See *DataStage Install and Upgrade Guide*, "“Windows.”"

See *DataStage Install and Upgrade Guide* "“UNIX.”"

If you experience any issues with the upgrade, or if you elect to perform a new installation, remove any previous Ascential DataStage releases that are on your system before you begin.

---

**Note.** For a UNIX system, you must have root privileges to perform an upgrade.

---



---

**Note.** Uninstalling a previous release of Ascential DataStage will result in the loss of project data currently in the server.

---

To uninstall a previous Ascential DataStage release on Microsoft Windows:

1. Select Start, Settings, Control Panel.
2. Select Add/Remove Programs in the Control Panel window.
3. Locate the applications that begins with the term *DataStage* in the list of currently installed programs.
4. Remove the Ascential DataStage applications in the following order:
  - a. DataStage XML Pack
  - b. DataStage Intelligent Assistant
  - c. DataStage Server
  - d. DataStage Client

5. Select Yes when the uninstall wizard asks whether to delete all files that relate to your project.
6. Select Yes when the uninstall wizard asks if you want to reboot your machine.

---

## Task 2-3: Installing Ascential DataStage Server on Microsoft Windows

This section discusses:

- Installing the Ascential DataStage Server
- Starting and Stopping the Ascential DataStage Server on Microsoft Windows

Begin by installing the Ascential DataStage server. If you are installing on a UNIX system, please proceed to the next task in this document.

### Task 2-3-1: Installing the Ascential DataStage Server

Begin by installing the Ascential DataStage server. If you are installing on a UNIX system, proceed to the task *Installing the Ascential DataStage Server on UNIX*.

To install the Ascential DataStage server on Microsoft Windows:

1. Insert the Ascential DataStage Windows installation CD-ROM.

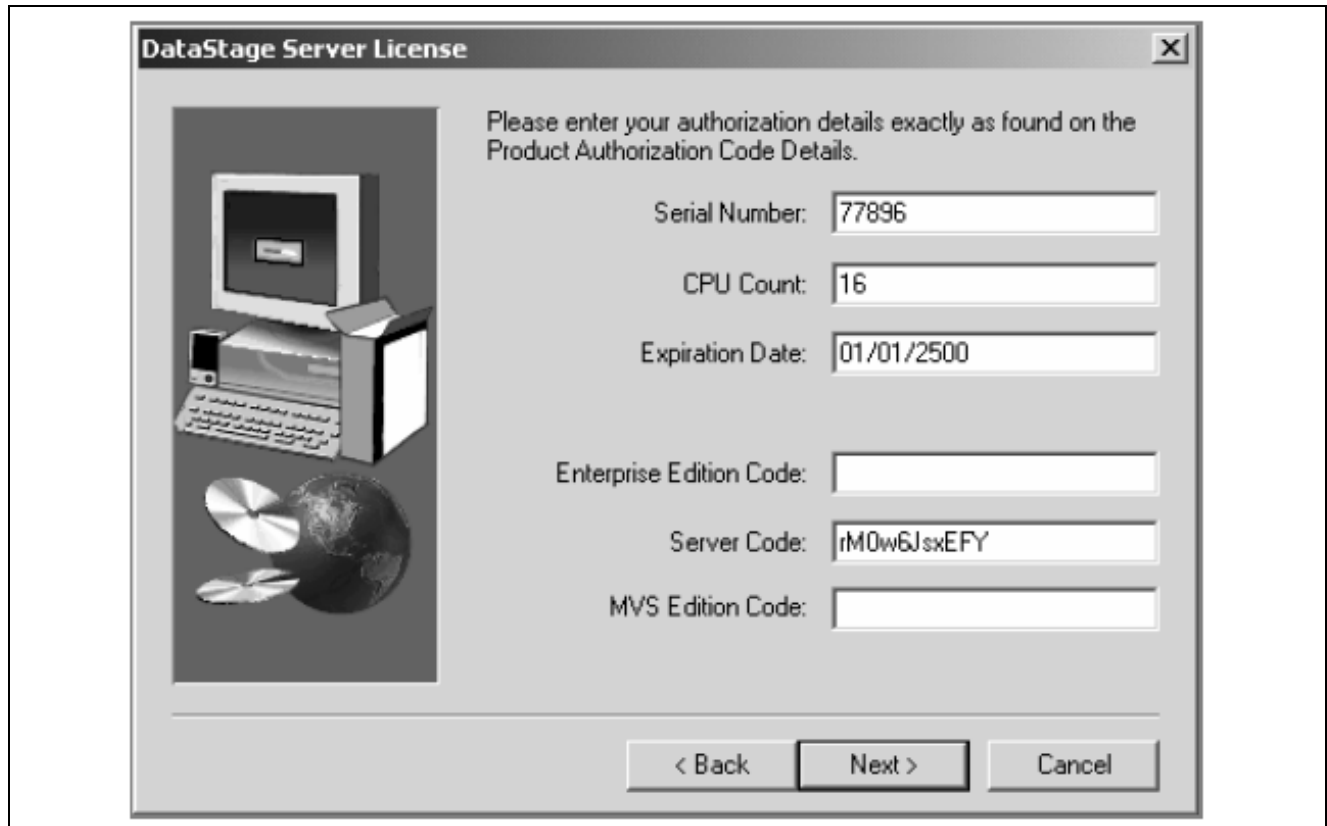
The Ascential DataStage Master Setup page appears. If you did not select Autorun and the setup screen does not appear, you can select the CD-ROM drive in your Microsoft Windows Explorer, and then double-click Install.exe.

2. On the Ascential DataStage Master Setup page, select Install Server Software.

The Ascential DataStage Welcome page appears.

3. Select Next.
4. Review the *important information* and then click Next.
5. Select I ACCEPT THE LICENSE AGREEMENT.

The Ascential DataStage Server License information page appears.



Ascential DataStage Server - License information page

6. On the Ascential DataStage Server License information page, enter the following server license authorization details as they appear in your license code cover letter:

- Serial Number – Enter the SERLOGID value provided by Oracle.  
For example: 77896
- CPU Count – 16.
- Expiration Date – 01/01/2500.
- Enterprise Edition Code – Leave this field blank.
- Server Code – Enter the authorization code provided by PeopleSoft: *rM0w6JsxEFY*.  
This value is case-sensitive.
- MVS edition code – Leave this field blank.

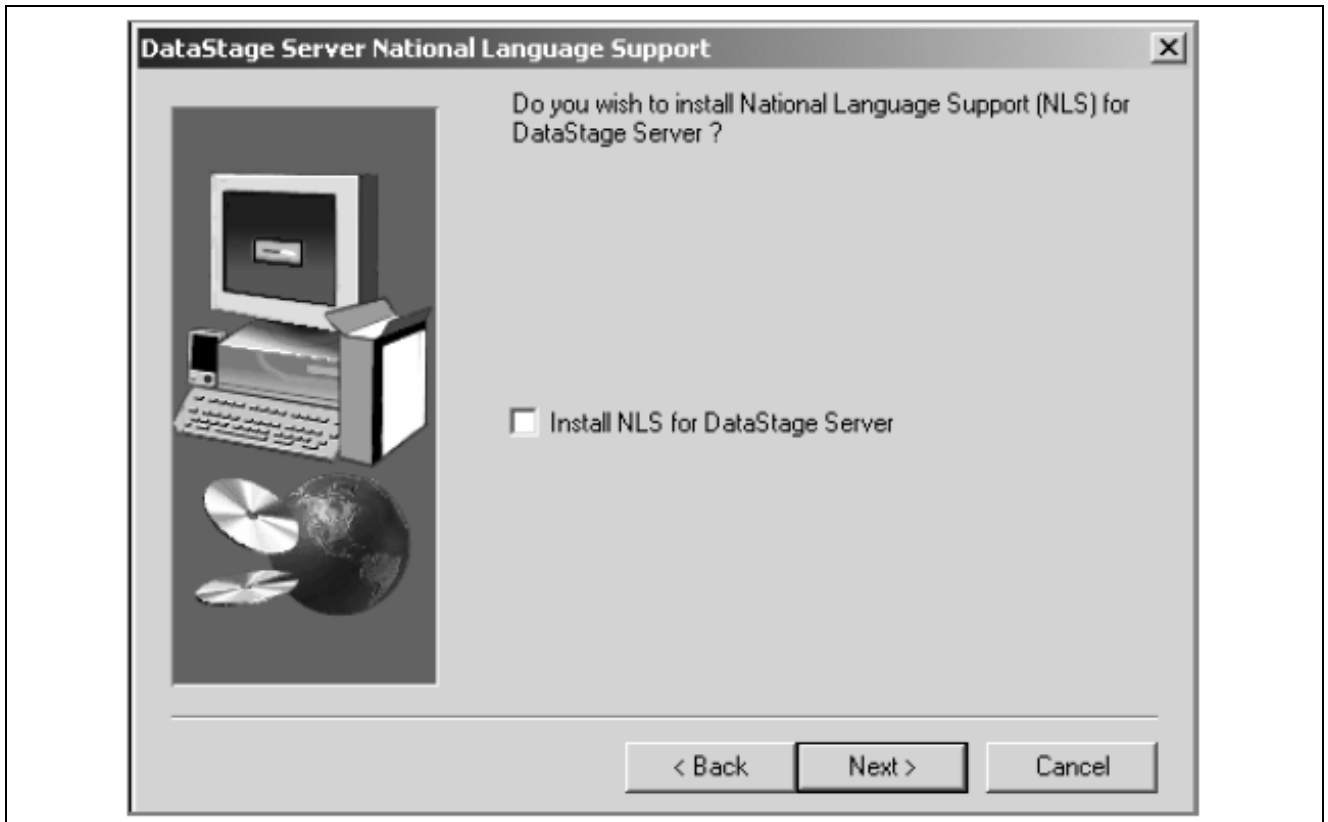
7. Click Next.

8. Click Next again.

You are not required to enter information on the Ascential DataStage Server Package License page.

9. Select the Destination Folder in which to install the Ascential DataStage Server, and then click Next.
10. Select the Default Program Folder Name, and click Next.
11. Select the Language, and then click Next.

The Ascential DataStage Server National Language Support page appears.



Ascential DataStage Server - National Language Support page

12. On the Ascential DataStage Server National Language Support page, select only the Install NLS for DataStage Server option if you are using Unicode or multibyte character-set databases.

If your database is non-Unicode, or if you are using only single-byte character sets, do *not* select this option.

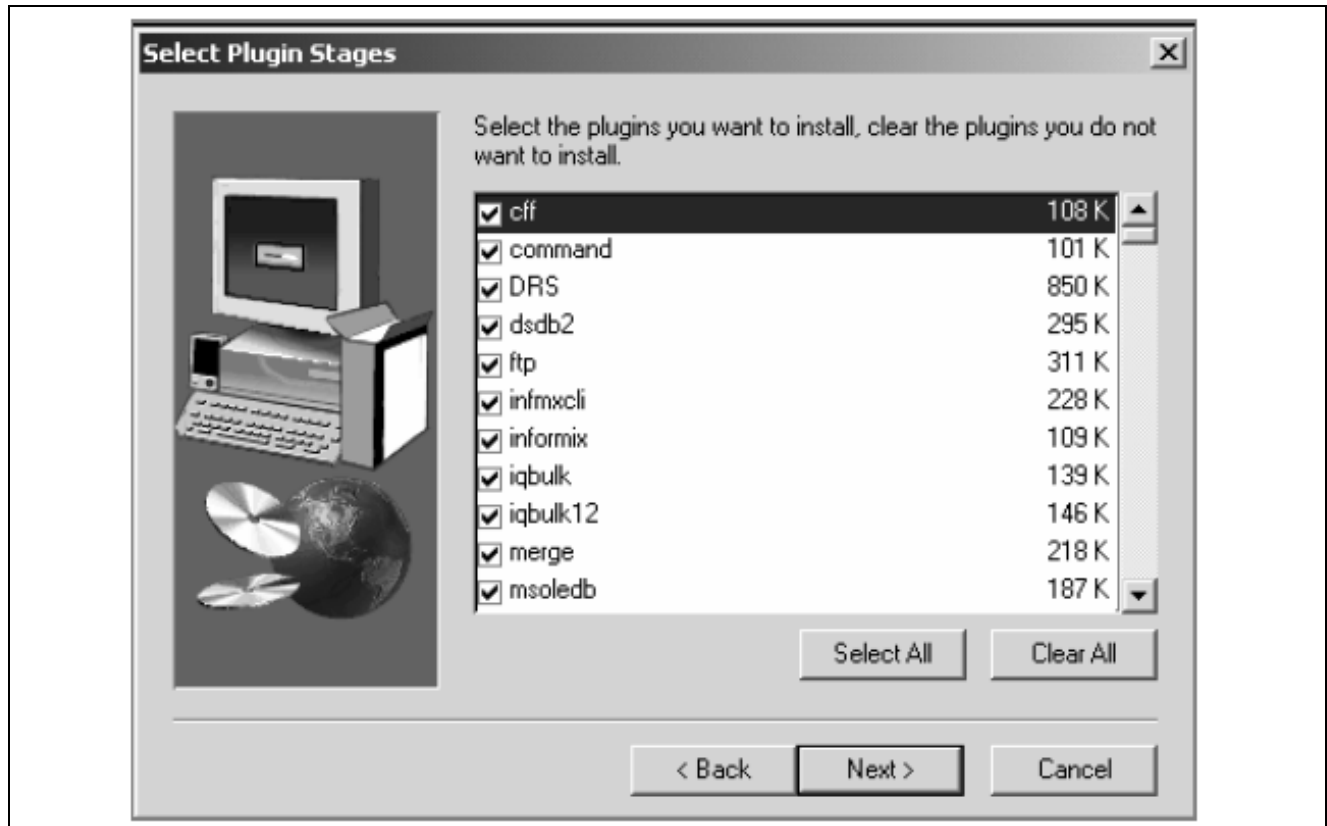
---

**Note.** If your database is non-Unicode, installing and running National Language Support (NLS) impacts your system performance, and requires that you reinstall the Ascential DataStage Server to remove this option. Refer to the Ascential DataStage documentation for more information.

---

13. Click Next.

The Ascential DataStage Select Plugin Stages page appears.



Ascential DataStage - Select Plugin Stages page

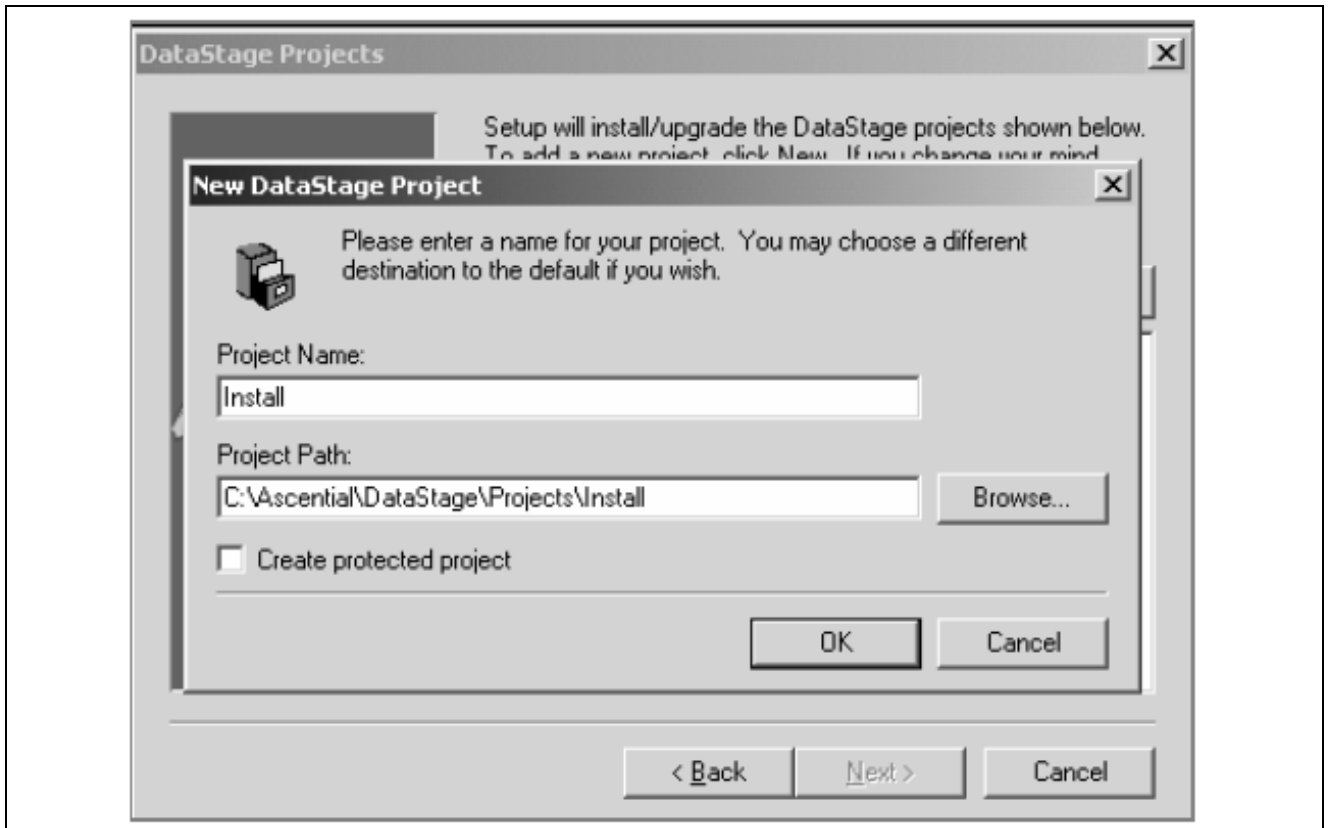
14. On the Select Plugin Stages page, click the Select All button, and then click Next.

The Ascential DataStage Projects page appears.

15. On the Ascential DataStage Projects page, select New.

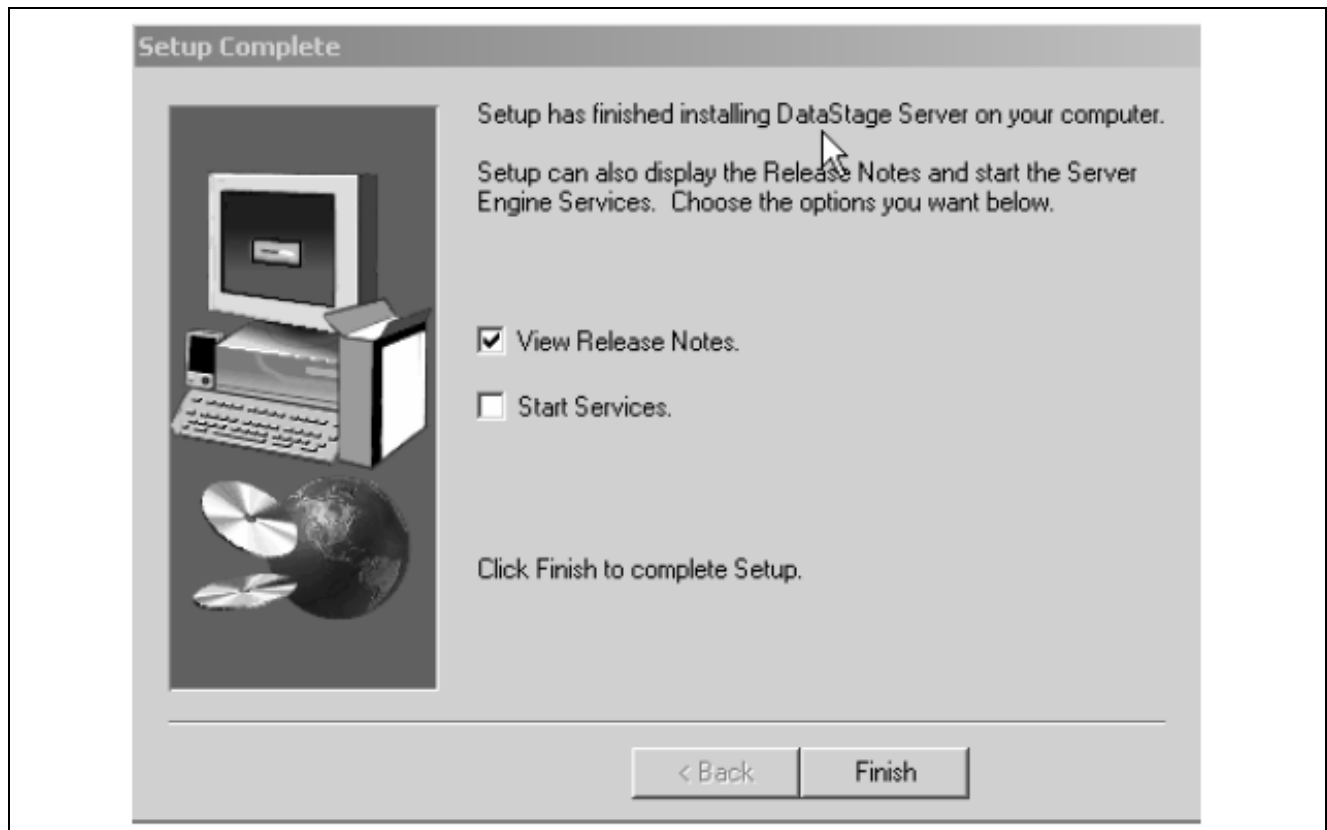
The New DataStage Project dialog box appears.





Ascential DataStage - New DataStage Project dialog box

16. Create a project by entering the project name *INSTALL* in the Project Name field.
17. Click OK, and then click Next to continue.
18. Review the summary information, and then click Next to begin installing the Ascential DataStage server.
19. When the installation completes, confirm the information that displays on the Ascential DataStage Setup Complete page.



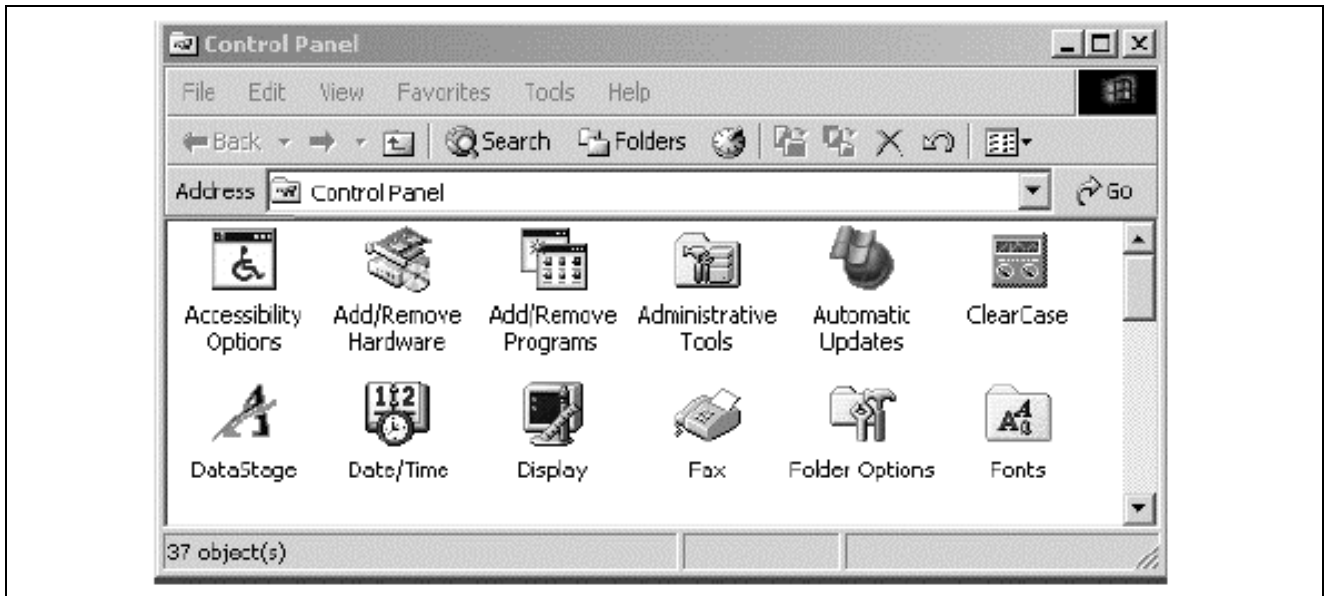
Ascential DataStage - Setup Complete page

20. As you desire, select the View Release Notes and Start Services check boxes (optional).
21. Click Finish to complete the Ascential DataStage installation.

## Task 2-3-2: Starting and Stopping the Ascential DataStage Server on Microsoft Windows

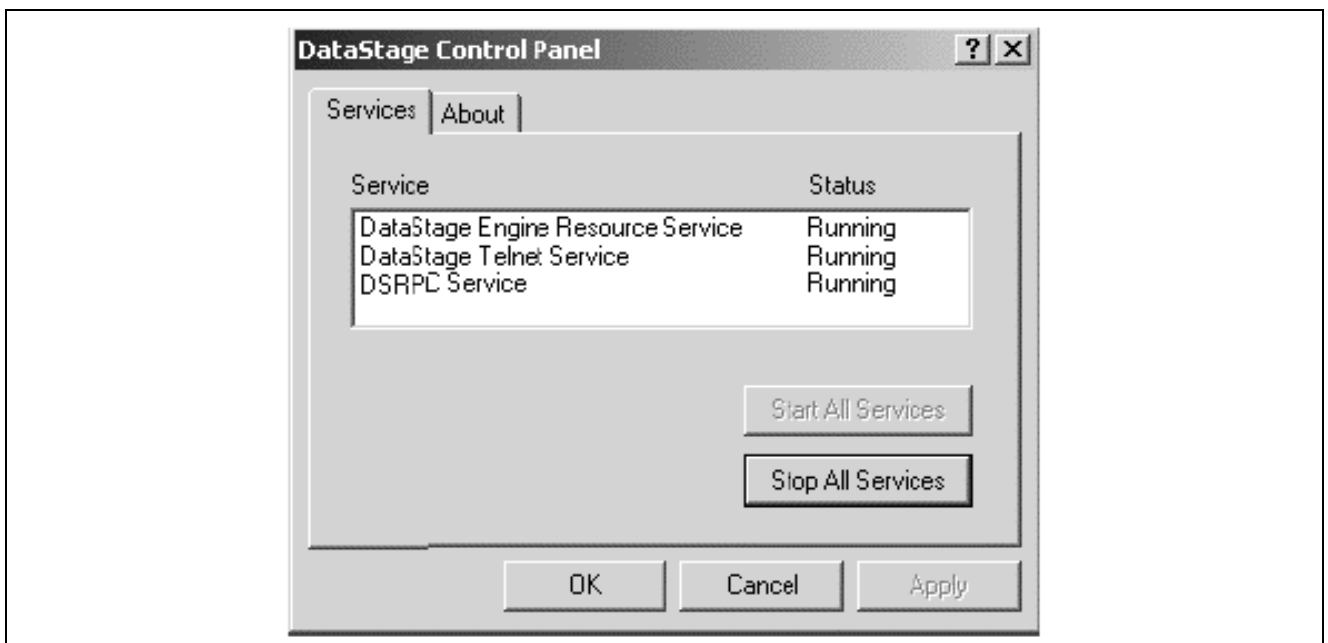
If you do not select the Start Services option on the Setup Complete page, you can use the Microsoft Windows Control Panel to start and stop the Ascential DataStage server on Microsoft Windows:

1. Select Start, Settings, Control Panel.



Microsoft Windows - Control Panel showing the Ascential DataStage icon

2. Double-click the DataStage icon, and then click the Services tab to view the status of the services.
3. If the services are running, you can click the Stop All Services button to stop them.



Ascential DataStage - Control Panel with Start or Stop All Services options

4. Alternatively, if the services are not running, you can start them by clicking the Start All Services button.

## Task 2-4: Installing the Ascential DataStage Server on UNIX

This section discusses:

- Understanding the Ascential DataStage Server Installation on UNIX
- Installing the Ascential DataStage Server on UNIX
- Completing the Ascential DataStage Installation on UNIX
- Starting and Stopping the Ascential DataStage Server on UNIX
- Verifying the Ascential DataStage Server is Running on UNIX

This task details how to install Ascential DataStage Server on a UNIX platform.

## Understanding the Ascential DataStage Server Installation on UNIX

This section discusses:

- Prerequisites
- Reviewing Root Versus Non-Root Installation
- Configuring Kernel Parameters
- Reviewing HP-UX-Specific Kernel Configuration
- Reviewing Pre-Installation Special Considerations
- Reviewing Symbolic Links

### Prerequisites

This section discusses the prerequisites and recommendations for installing the Ascential DataStage server on a UNIX platform:

- Create aliases if you are accessing DB2 OS/390 tables and views from the Ascential DataStage application.  
If the user that accesses the database through Ascential is different than the owner of the tables, you should create aliases to all source and target tables in the DB2 OS390 database.  
Examples of aliases are: `CREATE ALIAS USERID.PS_DEPT_TBL FOR OWNERID.PS_DEPT_TBL;`  
`CREATE ALIAS USERID.PS_D_ACCOUNT FOR OWNERID.PS_D_ACCOUNT;`  
In these examples, *USERID* is the ID of the user who will be logging on to the DB2 OS/390 using Ascential DataStage. *OWNERID* is the ID of the object owner for the database installation.
- Configure the kernel parameters.  
UNIX systems require kernel facilities for the Ascential DataStage server to run properly. Only a knowledgeable UNIX administrator should make these changes to the system.
- If you plan to copy the install media locally, you should create symbolic links.  
The Ascential DataStage installer expects the install media to be mounted on the UNIX machine with a set of options that append a “.” at the end of some of the files.
- Ascential supports 64-bit Oracle and DB2/LUW client libraries; however, the 32-bit client libraries are required.  
Ensure that you place the 32-bit libraries *before* the 64-bit libraries in the shared library path.

## Reviewing Root Versus Non-Root Installation

The Ascential DataStage server should be installed by the root user. For example, a normal user who must exist before the install begins, is given administration rights over Ascential DataStage.

The non-root install of Ascential DataStage is similar to the root install, with only minor differences as discussed in the Ascential DataStage Install and Upgrade Guide that Ascential provides with their software.

## Configuring Kernel Parameters

This table lists the minimum requirements to configure the kernel parameters:

Parameter	Sun Solaris	Hewlett Packard HP-UX	Hewlett Packard HP_UX Itanium	IBM AIX	RedHat and SUSE Linux
MSGMAX	8192	32768	65535	N/A	8192
MSGMNB	16384	32768	65535	N/A	16384
MSGSEG	N/A	7168	8192	N/A	N/A
SEMMNS	111	N/A	4096	N/A	128000
SEMMSL	111	N/A	2048	N/A	250
SEMMNI	20	1024	4096	N/A	1024
SEMOPM	N/A	N/A	N/A	N/A	32
MAXUPROC	100 per CPU	100 per CPU	100 per CPU	100 per CPU	100 per CPU
NOFILES	1000	1000	65536	1000	1000

The following guidelines are the minimum settings for shared memory kernel parameters. These settings apply to all UNIX platforms:

- SHMMAX – The maximum shared memory segment size.  
Minimum is 536870912. If disk caching is selected on the system, and the DISKCACHE variable is set for greater than 512, then SHMMAX must be larger.
- SHMMNI – The shared memory identifiers.  
This value depends on how many client connections, work processes, and IPC links are active at any time. An adequate minimum value for all but the most complex systems is 2000. The maximum value for SHMMNI on HP-UX is 1024.
- SHMSEG – The maximum attached shared memory segments per process.  
A minimum setting of 200 is generally adequate.

## Reviewing HP-UX-Specific Kernel Configuration

This table lists the maximum size of segments, including data and text segments, that you should set on HP-UX:

User Parameter	Setting
Maxdsiz	2039480320 (1945 MB)
Maxssiz	82837504 (79 MB)

User Parameter	Setting
Maxtsiz	1073741824 (1024 MB)
Rss	64 MB minimum (131072 512-byte blocks)

This table lists the maximum size of segments, including data and text segments, that you should set on HP-UX:

User Parameter	Setting
Maxdsiz	1073741824 (1024 MB)
Maxdsiz_64bit	4294967296 (4096 MB)
Maxssiz	8388608 (8 MB)
Maxssiz_64bit	268435456 (256 MB)
Maxtsiz	100663296 (96 MB)
Maxtsiz_64bit	1073741824 (1024 MB)

## Reviewing Pre-Installation Special Considerations

This section details special considerations that are dependant on the type of UNIX system and the systems that you previously installed. Linux systems require no special considerations.

- Sun Solaris

Ensure that you have the following setting in /etc/system:

```
shmsys:share_page_table=0
```

- IBM AIX

The C++ runtime library for IBM AIX for all installations is required.

Ascential provides the C++ runtime library details in the *Ascential DataStage Install and Upgrade Guide*, “Installing on UNIX Systems: Deployment Systems.”

To schedule jobs after installation, change the permission of /usr/spool/cron/atjobs from 770 to 775 (rwxrwxr-x).

## Reviewing Symbolic Links

The Ascential DataStage installer expects that the install media has been mounted on the UNIX machine with a set of options that append a “.” at the end of some of the files. If you copied the install media locally, the installer will fail and an error similar to the following appears:

```
[DataStage Server 7.5 - Installation and Maintenance Utility]

Unpacking support libraries
./install.sh: /data0/psbase/install_media/TP-ASC75SOLRO/solaris/server.: cannot⇒
open
ERROR: cannot unpack libdslic.so
```

To avoid this error, create a set of symbolic links with the appropriate file names, as in the following example:

```
ln -s ./setup ./setup.
cd solaris/
ln -s ./server ./server.
cd dbengine/
```

```
ln -s ./startup ./startup.
```

## Task 2-4-1: Installing the Ascential DataStage Server on UNIX

To install Ascential DataStage Server on UNIX as a root user:

1. Log in as root.
2. Create the account that you plan to use as the Ascential DataStage administrative user.  
For example, the PeopleSoft user: *psoftuser*
3. Insert the appropriate Ascential DataStage CD-ROM in the drive and if necessary, mount the drive.
4. Switch to the directory where the CD-ROM drive is mounted and run the InstallShield (Install.sh) program in that directory.

Remember that, as the installer, you must have the appropriate unmask setting (Oracle recommends 022 or 0022). The suffix or case of the program name may vary according to your platform, as shown in the following table.

This table uses psoftuser, the PeopleSoft user, as the Ascential DataStage administrative user:

Operating System	Install Command Syntax
Sun Solaris	install.sh -admin psoftuser
IBM AIX	install.sh -admin psoftuser
Hewlett Packard HP-UX	'INSTALL.SH;l' -admin psoftuser
RedHat and SUSE Linux	'install.sh -admin psoftuser'

5. A warning page appears and inquires if you are installing a fresh system and not upgrading.  
Enter *y* to continue.
6. If the install detects that you have a previous release of the UniVerse database installed, you are prompted to specify an alternative port number for your Ascential DataStage installation.  
By default, Universe and Ascential DataStage use the same port number.  
Click Next to continue.
7. When prompted, confirm that the installation is complete.  
Click Next to continue.
8. A page that summarizes the installation procedure that you selected appears.  
Click Next to continue.
9. The license agreement acknowledgement page appears.  
Enter *y* to accept.
10. For a fresh install, the Ascential Choose Temporary Location page appears. Do the following:  
Specify the location where you plan to unpack the Ascential DataStage server setup files. The default directory is /tmp/.
  - To change the temporary location, select *c* (change).

- Enter the new path name at the prompt and press Return.

Select *n* (next) to continue .

The Ascential DataStage Server License page appears.

11. On the Ascential DataStage Server License information page, enter the following server license authorization details as they appear in your license code cover letter:

- Serial Number – Enter the SERLOGID value provided by Oracle.

For example: 77896

- CPU Count – 16.
- Expiration Date – 01/01/2500.
- Enterprise Edition Code – Leave this field blank.
- Server Code – Enter the authorization code provided by PeopleSoft:  
This value is case-sensitive.
- MVS edition code – Leave this field blank.

Enter each item and then press Return.. The completed license information appears for your review and edit. After you complete your review and edit of the license information, select *n* (next) to validate the license.

The Ascential License Packages page appears.

You are not required to enter information on the Ascential DataStage Server Package License page.

12. Select *n* (next) to proceed to the Ascential Choose Destination Location page.
13. Specify the location where you want to install the Ascential DataStage Server engine, or you can accept the default.

To edit the location, select *c* (change), enter the new destination and press Return. Then select *n* (next) to continue. The installer appends /Ascential/DataStage onto the base location that you provide.

The NLS Select Language page appears.

14. To accept the default language of English, select *n* (next).

To change the default, select *c* (change), enter the corresponding number for the language that you desire, and then press Return.

Select *n* (next).

If you selected English as the server language, the National Language Support page appears.

15. If you are using Unicode or multibyte character set databases, enter *c* and enter 2 to select Install NLS for DataStage Server.

---

**Note.** Do *not* select this option if the databases are non-Unicode or if you are using only single-byte character sets.

---

Select *n* (next) to continue.

---

**Note.** If your database is non-Unicode, then installing and running NLS affects your system performance. To remove this option, you must reinstall the Ascential DataStage Server.

---

16. Select *n* (next).



The Ascential Select Plugin Stages page appears.

17. Select *a* (all) to install all of the plugins. Select *n*(next) to continue.

The Ascential Projects page appears.

18. Enter *INSTALL* as the project name, and then press Return for the default project page.
19. Enter *U* for *unprotected project*, to ensure that the project is not created as read-only.
20. Select *n* (next) to continue.

The Ascential Start Copying Files page appears.

21. Review the install information, and then do one of the following:
  - Select *p* (page) to page through and review the information.
  - Select *b* (back) to go back and make changes.
  - Select *n* (next) to exit the setup wizard and start copying the files.
22. The installer displays a series of configuration pages that require no additional input from you.
23. Review the log file for any text output that the install process generates. This file is located in the `/tmp/dsinstall/logfiles` directory.

Log file names are of the format `dsinstall.log MMDDYY.HHMMSS`.

---

**Note.** If you are installing as the non-root user, you must unset the `LD_PRELOAD` on `$DSHOME/dsenv` after you install on HP-UX with Oracle 9i.

---



---

**Note.** If you are using Oracle 9i as your relational database management system (RDBMS) platform, and you receive the error message “Could not load drsoci.so” when running an Ascential job, you must modify your `dsenv`. To do this, change the `SHLIB_PATH`, `LIBPATH` or `LD_LIBRARY_PATH` (depending on your platform) so that the `$ORACLE_HOME/lib` path comes *before* the `branded_odbc/lib` path. This library path is `$ORACLE_HOME/lib32` for the 64-bit release of Oracle.

---

After you complete this change, you must rerun `dsenv` and restart your Ascential DataStage Server before the changes can take effect.

---

## Task 2-4-2: Completing the Ascential DataStage Installation on UNIX

After your installation completes, review the Ascential DataStage documentation for installing and upgrading. In particular, review the section on non-root installs if you are installing non-root and environment variables. Additionally, you must modify your `$DSHOME/DSEngine/dsenv` to include the library path in an environment variable. You must identify the specific environment variables that are required for the plug-ins to work properly on your UNIX platform.

See *Ascential DataStage Install and Upgrade Guide*, "Installing on UNIX Systems."

See *Ascential DataStage Plug-in Installation and Configuration Guide*.

If the error message “Could not load <dbms\_platform>.so” appears when you run an Ascential DataStage job (where <dbms\_platform> is the DBMS platform that you are using), you must modify the dsenv file to include the path to the DBMS platform library. Modify the environment variable that specifies the library (either SHLIB\_PATH, LIBPATH, or LD\_LIBRARY\_PATH, depending on your platform) to include the appropriate location, as shown in the following table. After modifying the dsenv file, you must stop and restart the Ascential DataStage server.

RDBMS Platform	File Name in Error Message	Library Path
Oracle	drosci.co	\$ORACLE_HOME/lib
Oracle 64-bit	drosci.co	\$ORACLE_HOME/lib32
DB2/LUW	drsd2.so	\$DB2LUW_HOME/lib

## Task 2-4-3: Starting and Stopping the Ascential DataStage Server on UNIX

To start and stop the Ascential DataStage server on UNIX:

---

**Note.** Before stopping or starting the server, ensure that the Ascential DataStage environment has been set properly. To do this, run \$DSHOME/DSEngine/dsenv.

---

1. To start the server, enter the following command:

```
$DSHOME/bin/uv -admin -start
```

For example:

```
# pwd
/psoft/Ascential/DataStage/DSEngine/bin
# . ../dsenv
# ./uv -admin -start
```

```
DataStage Engin 7.0.1.1 instance "ade" has been brought up
```

2. To stop the server, enter the following command:

```
$DSHOME/bin/uv -admin -stop
```

## Task 2-4-4: Verifying the Ascential DataStage Server is Running on UNIX

To verify that the Ascential DataStage server is running on UNIX, enter the following command:

```
ps -ef | grep dsrpd
```

---

## Task 2-5: Running the Ascential DataStage Server on a Non-Default Port (Optional)

The Ascential DataStage server generally runs on 31538/tcp and it takes this setting from the /etc/services file. You can override this setting by changing the value for dsrpd in the /etc/services file.

To run the Ascential DataStage server on a non-default port:

1. Stop the Ascential DataStage server.
2. Edit the /etc/services file to specify which port to use:

```
njsd      2049/tcp nfs    #NFS server daemon (cots)
eklogi    2105/tcp      #Keberos encrypted rlogin
lockd     4045/udp    #NFS lock daemon/manager
lockd     4045/tcp    #
dtspc     6112/tcp    #CDE subprocess control
fs        7100/tcp    #Font server
#
# DataStage RPC Services
#
#
# DataStage RPC Services
#
#dsrpc     31538/tcp    #DSEngine rpc daemon
dsrpc     31540/tcp    #DSEngine rpc daemon
```

3. Start the Ascential DataStage server.

---

## Task 2-6: Installing the Ascential DataStage Clients

You must install Ascential DataStage clients on Microsoft Windows, regardless of the Ascential DataStage server platform that you are using. Use the client utilities to administer the Ascential DataStage server and to run jobs.

To install Ascential DataStage clients:

1. Insert the Ascential DataStage for Microsoft Windows installation CD-ROM.

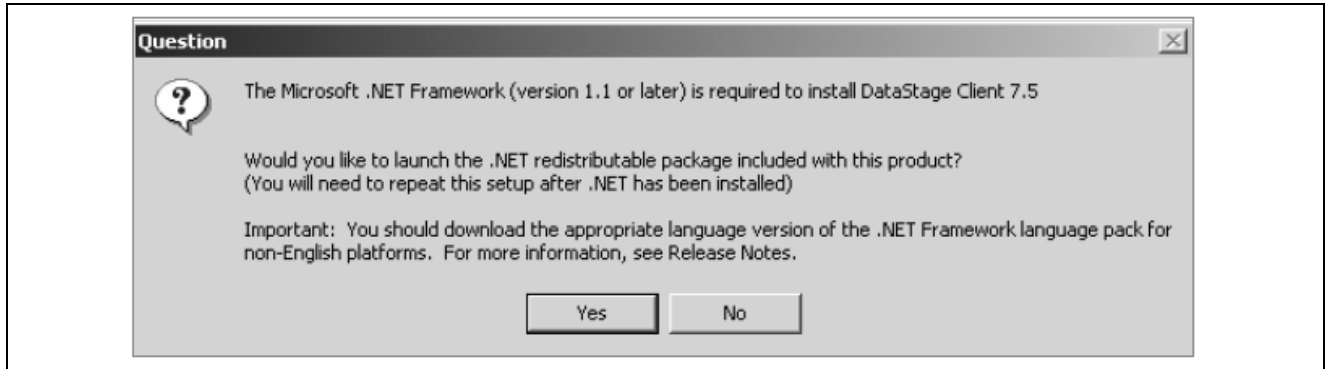
The Ascential DataStage Master Setup page appears automatically. If you did not select Autorun and the page does not appear, select the CD-ROM drive from your Microsoft Windows Explorer, and then double-click Install.exe.

2. On the Ascential DataStage Master Setup page, select Install Client Software.

---

**Note.** If Microsoft .NET Framework (version 1.1) is installed on the system, you can skip steps 3 through 7 to install Microsoft .NET Framework 1.1 that follow.

---



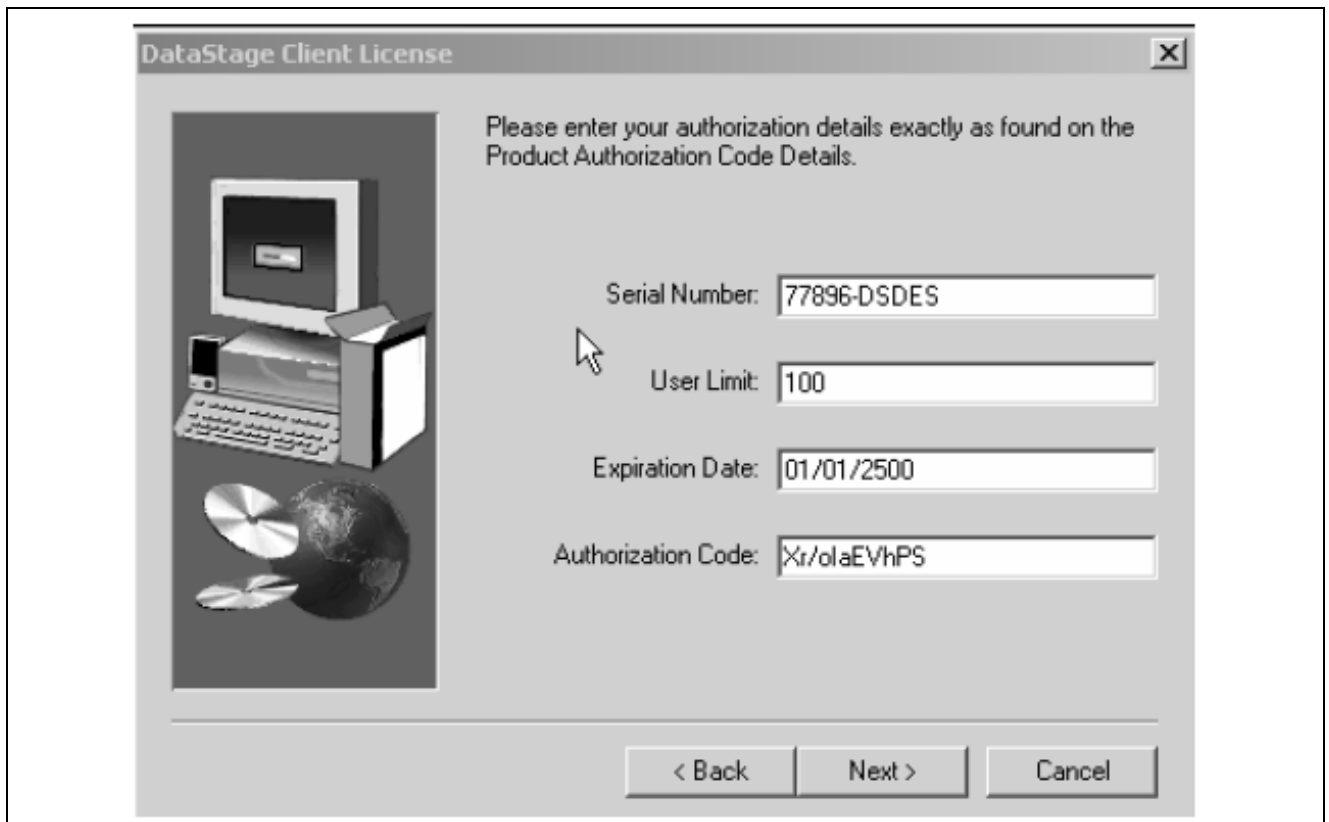
Question prompt to launch the Microsoft .Net Framework 1.1 installation

3. Select Yes to install the Microsoft .NET Framework (version 1.1).
4. Click Yes to begin the installation of Microsoft .NET Framework 1.1 Package.
5. Select I agree on the Ascential DataStage License Agreement page and then click the Install button to begin the installation.
6. After the Microsoft Net Framework setup completes, click OK.
7. The .Net Framework 1.1 installation stops the Ascential DataStage's client installation. Select Install Client Software from the Ascential DataStage Master Setup page to restart the Ascential DataStage client installation.

The Ascential DataStage Welcome page appears.

8. Click Next on the Ascential DataStage Welcome page.
9. Review the *Important Information* and then click Next.
10. Click I ACCEPT THE LICENSE AGREEMENT.

The Ascential DataStage Client License page appears.



Ascential DataStage Client License information page

11. Enter the Ascential DataStage client license information, using the information that is provided in your license code cover letter:
  - Serial Number – Enter the Ascential DataStage Client SERLOG.ID for the appropriate server platform.
  - User Limit – Enter 100.
  - Expiration Date – Enter 01/01/2500.
  - Authorization Code – Enter the DataStage Client authorization code provided for the appropriate server platform.
12. Click Next.
13. On the Ascential Setup Type page, select Typical and then select the destination folder. This destination folder should be different than the folder that you used in the Ascential DataStage Server installation.
14. Click Next.
15. On the Ascential Intelligent Assistant Template Location page, click Next to use the default destination folder.
16. Review the Summary information, and then click Next to begin the installation.
17. Click Yes if you want to add shortcuts to your desktop.
18. On the Ascential Setup Complete page, click Finish to complete the client install.

## Task 2-7: Configuring the Ascential DataStage Server for Multiple Database Platforms

This task describes how to configure the server for multiple database platforms.

Complete the steps in this table on the server machine that is based on your target database types and required source files (flat or XML). This selection depends on your licensing and implementation plans.

Source or Target Database	Steps to Complete
Oracle	Install the Oracle client on the machine where the Ascential DataStage Server is installed. Include all of the database names in the TNSNames.ora file.
SQL Server	Install the Microsoft SQL Server client on the machine where the Ascential DataStage server is installed. Create ODBC connections for the source or target database.
DB2 on OS390	Install the DB2 connectivity on the machine where the Ascential DataStage Server is installed. Create ODBC connections for the source or target database.
DB2 on UNIX/Microsoft Windows	Install DB2 connectivity on the machine where the Ascential DataStage Server is installed. (omit if already done). Create ODBC connections for the respective source or target database.
Flat File / XML file Sources & Targets	Flat files or XML files must be stored in the server machine (in any path).
Sample Source Data Files	In the document, "Parameter and Source Data Files Information," find the sample data files that are available for different warehouses that you may need to extract and post in any of the paths in the server machine. These files are dependant on your license and your plan for implementing Marts or PeopleSoft EPM applications.

## Task 2-8: Creating the Ascential DataStage Projects

Details on how to create Ascential DataStage projects for PeopleSoft EPM are available. Refer to the *PeopleSoft EPM Foundation for Analytical Applications and Performance Management Warehouse PeopleBook*, "Setting Up and Configuring Ascential DataStage and MetaStage for PeopleSoft EPM: Setting Up Ascential DataStage Projects."

## Task 2-9: Configuring Environmental Parameters

Details on how to configure the Ascential DataStage parameter (DSParamus) file for PeopleSoft EPM are available. Refer to the *PeopleSoft EPM Foundation for Analytical Applications and Performance Management Warehouse PeopleBook*, "Setting Up and Configuring Ascential DataStage and MetaStage for PeopleSoft EPM: Configuring Environmental Parameters."

---

## Task 2-10: Importing the .DSX Files

Details on how to import the .dsx files are available in the PeopleSoft PeopleBook *Setting Up and Configuring Ascential DataStage and Ascential MetaStage for PeopleSoft EPM*.

1. Import the SAMPLE.dsx file to the PeopleSoft EPM90\_Sample project that you previously created.  
The .dsx file is located at: <PS HOME>\SRC\ETL
2. After you complete this task, refer to the PeopleSoft Enterprise Performance Management Warehouse PeopleBook, Loading Data into the Multidimensional Warehouse, for the ETL implementation steps.





## CHAPTER 3

# Installing and Configuring Ascential MetaStage

This chapter discusses:

- Prerequisites
- Accessing Ascential MetaStage and PeopleSoft MetaBrokers Documentation
- Preparing for the Ascential MetaStage Installation
- Installing Ascential MetaStage
- Installing the PeopleSoft MetaBrokers
- Configuring the Host Database for the Ascential MetaStage Directory
- Creating the Ascential MetaStage Directory
- Populating the Ascential MetaStage Directory

This chapter provides instructions for installing and configuring Ascential MetaStage and the PeopleSoft MetaBrokers for Oracle's PeopleSoft Enterprise Performance Management (EPM) applications.

---

**Note.** Ascential MetaStage is the new metadata management tool for use in conjunction with the PeopleSoft EPM Metadata Console.

---

## Prerequisites

You must install Ascential MetaStage on a machine to which the Ascential DataStage client is already installed.

Instructions on how to install Ascential DataStage are available in this guide and also on the Ascential website. For instructions on how to configure Ascential DataStage for use with PeopleSoft Enterprise Performance Management, refer to the chapter *Installing and Configuring Ascential DataStage* in this installation guide.

---

## Accessing Ascential MetaStage and PeopleSoft MetaBrokers Documentation

Ascential provides the following documentation with the Ascential MetaStage software. To access this documentation, insert the Ascential MetaStage installation CD and do the following:

Select Docs, ENU.

From here you can access the following manuals:

- msusegde.pdf – *MetaStage Users Guide*.

- msadmgde.pdf – *MetaStage Administrator's Guide*.

To access the documentation on the PeopleSoft MetaBrokers, insert the PeopleSoft MetaBrokers 7.5 CD and select the following:

- Dstage 7, to access the readme file for the Ascential DataStage MetaBroker
- PeopleSoft, to access the readme file for the PeopleSoft Metabroker

---

## Task 3-1: Preparing for the Ascential MetaStage Installation

To prepare for the Ascential MetaStage installation, review the following table of requirements:

Requirement	Microsoft Windows
Ascential MetaStage Client Requirements	<ul style="list-style-type: none"> <li>• Microsoft Windows 2000 SP4 or later</li> <li>• Microsoft Windows 2003</li> </ul>
Client Disk Minimum Requirements	<ul style="list-style-type: none"> <li>• 20 MB for Ascential MetaStage Client.</li> <li>• 1.5 MB for Ascential MetaStage MetaBroker.</li> <li>• 2.5 MB for Ascential DataStage MetaBroker.</li> <li>• 1.5 MB for PeopleSoft MetaBroker.</li> <li>• 1 MB for Help files</li> </ul>

Microsoft JVM version 5.00.3309 or later is required. This is installed by default with some operating systems. If Microsoft JVM 5.00.3309 or later does not exist on your client machine, you can install it from the following location on the Ascential MetaStage CD: \\jvm\initial\MSJavx86.exe.

---

## Task 3-2: Installing Ascential MetaStage

---

**Note.** Oracle does not support Ascential MetaStage on DB2 UDB for z/OS.

---



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**Note.** You must install the Ascential MetaStage Client on a system to which the Ascential DataStage client is already installed.

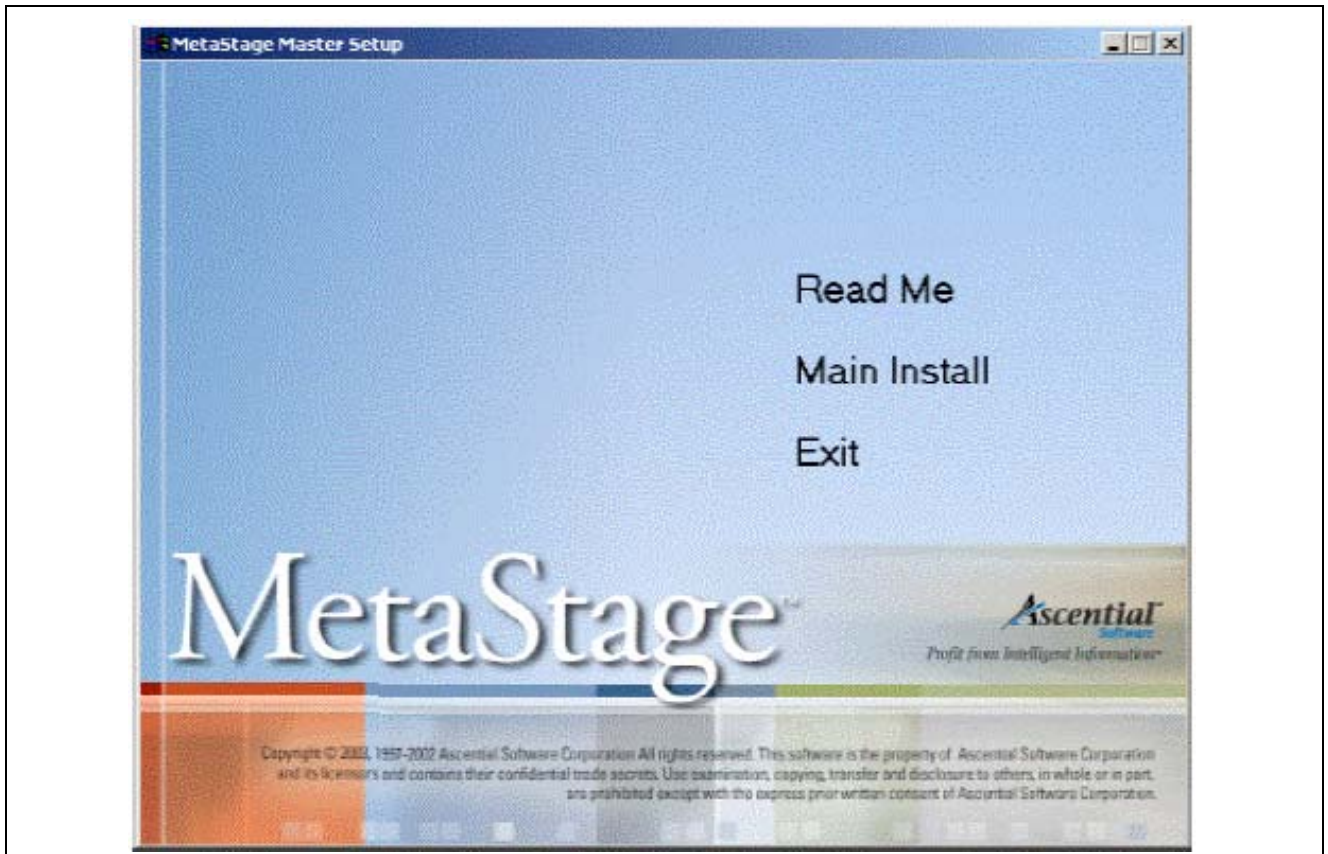
---

To install Ascential MetaStage:

1. Insert the Ascential MetaStage installation CD-ROM.

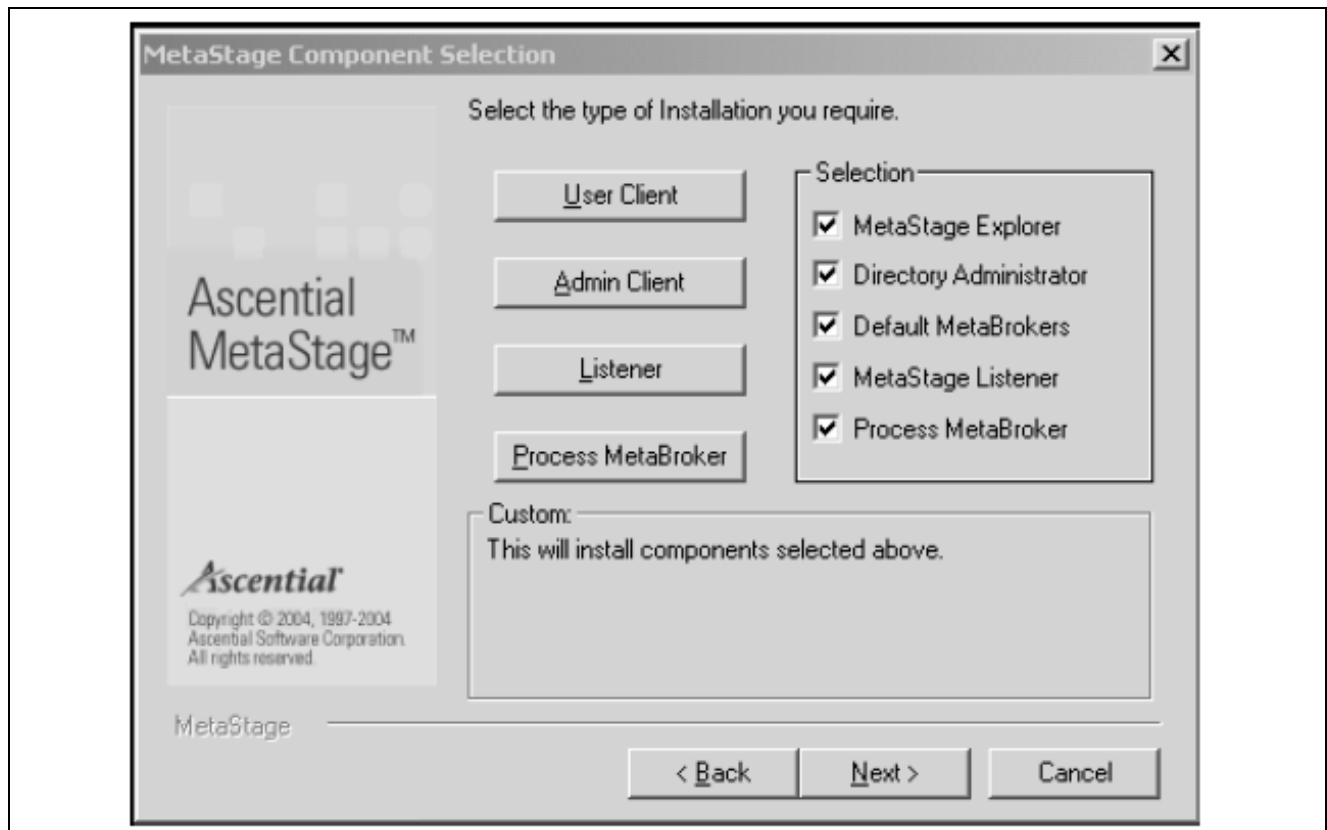
The Ascential MetaStage Master Setup page appears automatically.

If you did not select Autorun and the page does not appear, select the CD-ROM drive from your Microsoft Windows Explorer, and then double-click inst32i.exe.



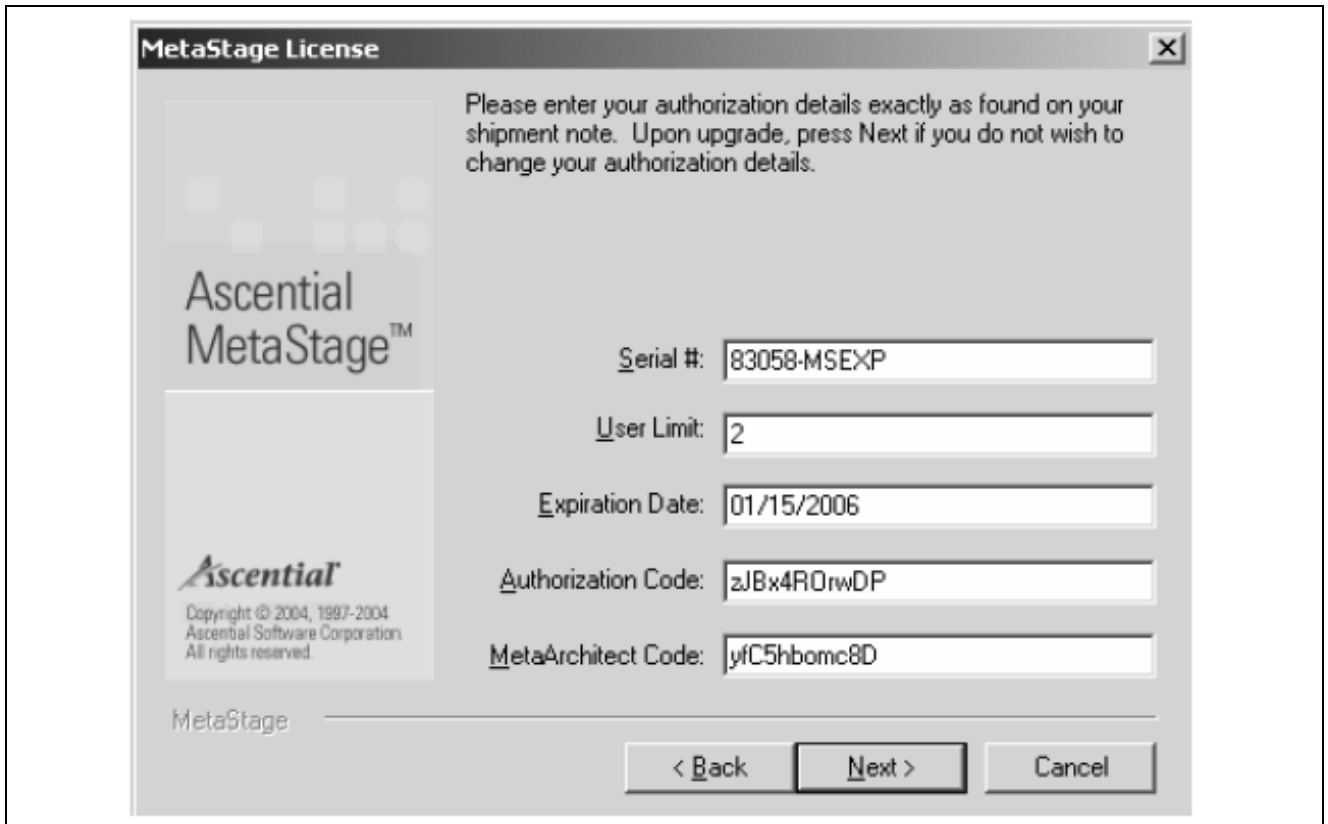
Ascential MetaStage Master Setup page

2. On the Ascential MetaStage Master Setup page, click the Main Install link.  
The Ascential MetaStage Welcome page appears.
3. On the Ascential MetaStage Welcome page, click Next.  
The Ascential MetaStage License Agreement page appears.
4. On the Ascential MetaStage License Agreement page, click I ACCEPT THE LICENSE AGREEMENT.  
The Ascential MetaStage Component Selection page appears.



Ascential MetaStage Component Selection page

5. Select all of the components in the Selection group list (for example: MetaStage Explorer, Directory Administrator, Default MetaBrokers, MetaStage Listener, and Process Metabroker), and then click Next. The Ascential MetaStage License information page appears.



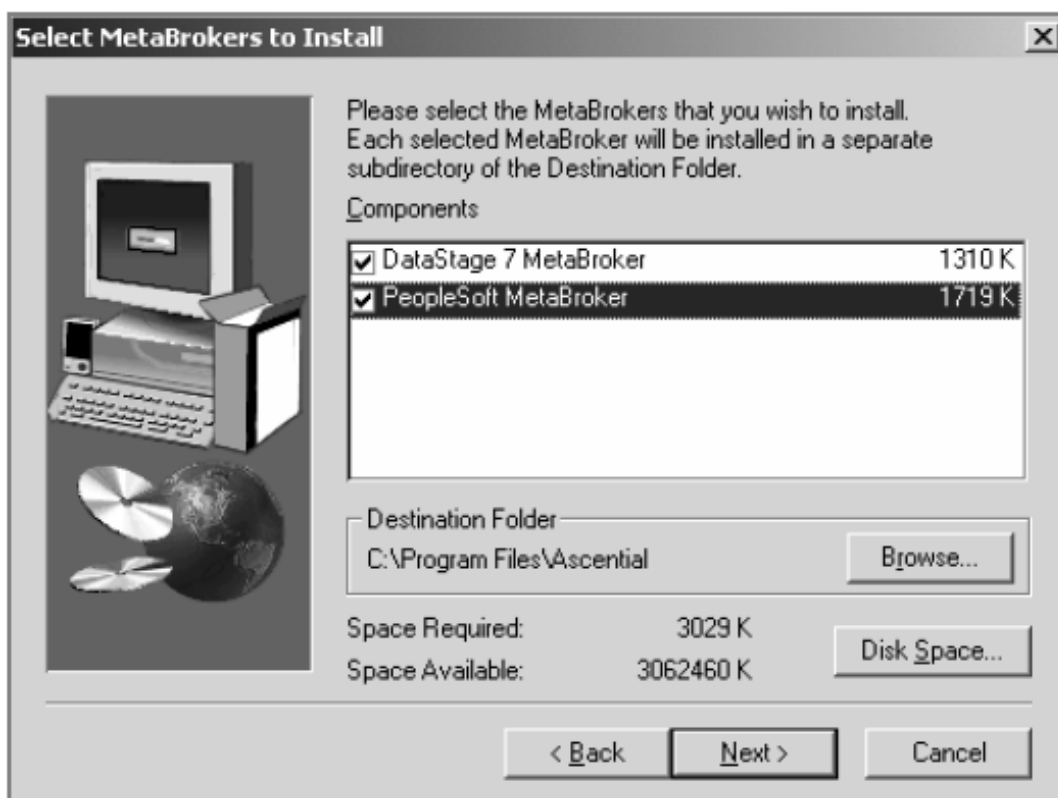
Ascential MetaStage License information page

6. On the Ascential MetaStage License information page, enter the license information that is provided with your Ascential MetaStage software, as follows:
  - Serial # – Enter the SERLOG ID for the Ascential MetaStage Explorers.
  - User Limit – 2.
  - Expiration Date – Enter the provided expiration date.
  - Authorization Code – Enter the provided MetaStage Explorers authorization code.
  - MetaArchitect Code – Enter the MetaArchitect authorization code.
7. After you complete the license information fields, click Next to continue.
8. On the Ascential MetaStage Choose Destination Location page, click Next to accept the default location.
9. Click Next again to select the default program folder.  
The Ascential MetaStage Start Copying Files page appears.
10. Click Next.  
The Ascential Process MetaBrokers page appears.
11. On the Ascential Process Metabroker page, enter the name of the machine that hosts the listener.  
Click Next.  
The Ascential MetaStage Setup Instructions page appears.
12. On the Ascential MetaStage Setup Instructions page, click Next to complete the installation.
13. Click Finish to close the Install Shield Wizard, and then restart your computer.

## Task 3-3: Installing the PeopleSoft MetaBrokers

To install PeopleSoft MetaBrokers:

1. Insert the PeopleSoft MetaBrokers 7.5 CD-ROM.  
from your Microsoft Windows Explorer, select the CD-ROM drive and then double-click setup.exe.  
The PeopleSoft MetaBrokers InstallShield Welcome page appears.
2. On the PeopleSoft MetaBrokers InstallShield Welcome page, click Next.  
The PeopleSoft MetaBrokers License Agreement page appears.
3. On the PeopleSoft MetaBrokers License Agreement page, click I ACCEPT THE LICENSE AGREEMENT.  
The PeopleSoft Select MetaBrokers to install page appears.



PeopleSoft Select MetaBrokers to Install page

4. Select the Ascential DataStage 7 MetaBroker and the PeopleSoft MetaBroker, and then click Next.  
The PeopleSoft Confirm Selections page appears.
5. On the PeopleSoft Confirm Selections page, verify that the Ascential DataStage 7 MetaBroker and the PeopleSoft MetaBroker appear in the list under the current settings. Click Next to install the MetaBrokers.
6. Click Finish to complete the installation and exit the PeopleSoft InstallShield Wizard.

---

## Task 3-4: Configuring the Host Database for the Ascential MetaStage Directory

You must ensure that the database that hosts the Ascential MetaStage directory is configured correctly. Details of the configuration process are available in the *Ascential MetaStage Administrator's Guide*, "Configuring the Database." You can access this guide by selecting Start, Programs, Ascential, MetaStage, MetaStage Documentation.

Refer to the PeopleSoft EPM Hardware and Software Requirements guide for a complete list of the databases that Oracle supports.

---

**Note.** You can access the Ascential MetaStage Release Notes for additional information on databases and drivers by selecting Start, Programs, Ascential, MetaStage, Release Notes.

---

---

## Task 3-5: Creating the Ascential MetaStage Directory

This section discusses:

- Creating a New Ascential MetaStage Directory
- Completing Setup of a Microsoft SQL Server Data Source
- Completing Setup of an Oracle Data Source
- Completing Setup of a DB2 Data Source

After you install Ascential MetaStage and PeopleSoft MetaBrokers and you configure the database on which the metadata is stored. To do so you must start the Directory Administrator and create a new Ascential MetaStage Directory.

Before you start the Directory Administrator, you may need to configure the user environment variable for ClassPathI, if one is being used. To do so, select Start, Settings, Control Panel, System.

When you install Ascential MetaStage, an entry is added to the system environment variable for ClassPath. For example, C:\WINNT\java\classes\metastage.zip. You must manually add this entry to the user variable, otherwise Ascential MetaStage will not start.

If no user environment variable exists for ClassPath, no action is required.

### Task 3-5-1: Creating a New Ascential MetaStage Directory

To create a new Ascential MetaStage directory:

1. Start the Ascential MetaStage Directory Administrator by selecting Start, Programs, Ascential, MetaStage, Directory Administrator.

The Ascential MetaStage Welcome to the Directory Administrator page appears.

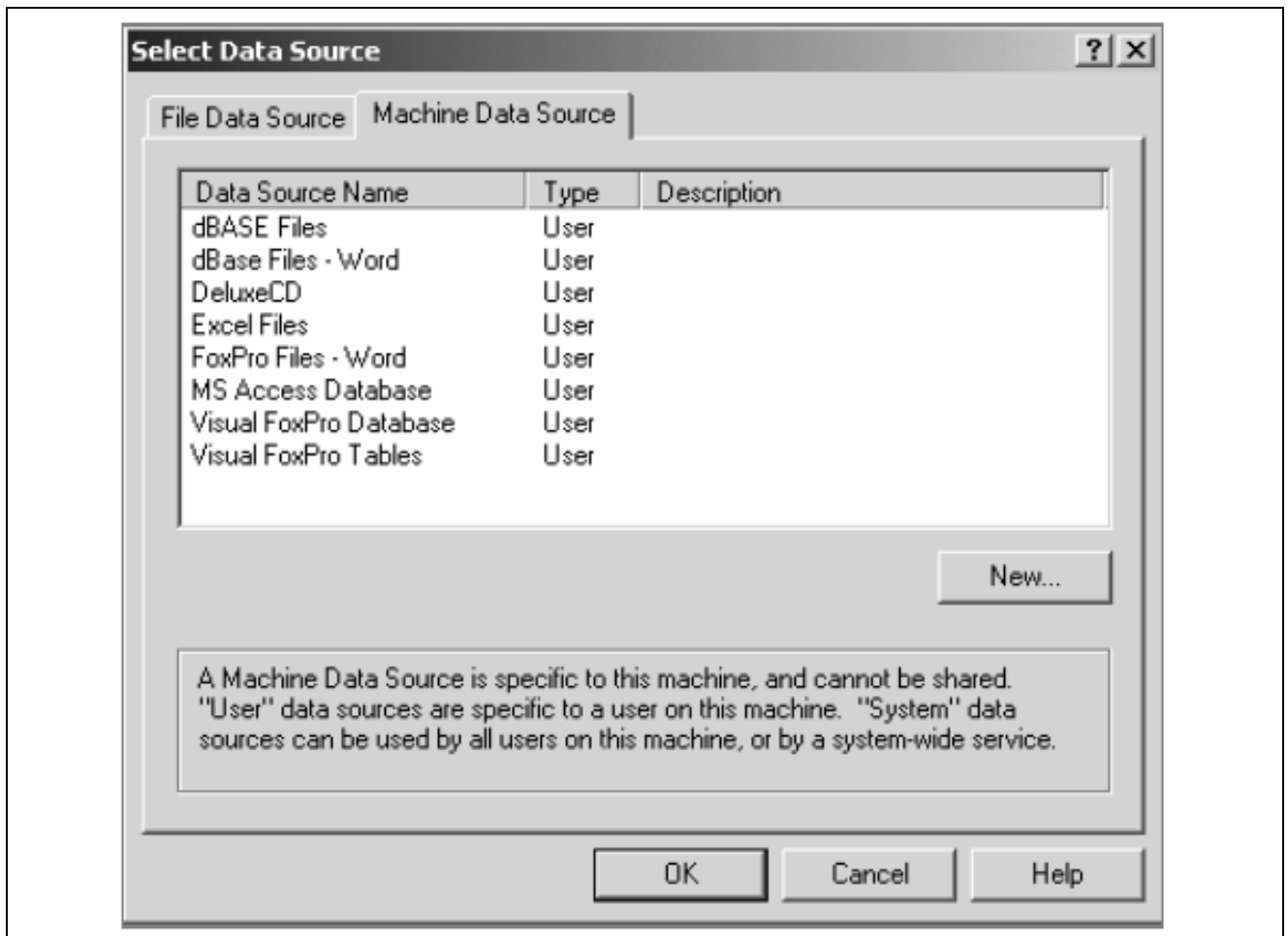


Ascential MetaStage - Directory Administrator Welcome page

2. Click the New button to create a new directory.

The Select Data Source dialog box appears.





Select Data Source - Machine Data Source page

3. In the Select Data Source dialog box, click the Machine Data Source tab.
4. On the Machine Data Source tab, click the New button.  
This starts the Create New Data Source Wizard.
5. Select System Data Source and click Next.  
The Wizard displays a list of available ODBC drivers.
6. From the list, select the appropriate driver for the database that will host the new directory, and then click Next.  
The Create New Data Source Wizard displays the details of the data source that you selected. Appropriate drivers are:
  - SQL Server for a SQL Server directory.
  - Oracle ODBC Driver for an Oracle directory.
  - IBM DB2 ODBC Driver for a DB2 directory.
7. Click Finish.  
The Setup dialog box for the data source types that you selected appears.

## Task 3-5-2: Completing Setup of a Microsoft SQL Server Data Source

When you choose to create an SQL Server data source in the Create New Data Source Wizard, the Create a New Data Source to SQL Server Wizard appears. This wizard guides you through the process of setting up the data source.

To complete setup of a Microsoft SQL Server data source:

1. At a minimum you should supply the following:
  - Name – The data source name used to connect to the data source.
  - Server – The name of the SQL Server.  
If you are configuring the directory on the same machine that hosts it, select (local).
2. Specify that the Ascential MetaStage users should enter a login ID and password for the SQL Server upon login.  
When the wizard asks you how you want to supply authentication details, do *not* select the default. Instead, select With SQL Server Authentication using the login ID and password entered by the user.
3. When your setup completes, click Finish.  
The ODBC Microsoft SQL Server Setup dialog box appears with details of the settings for the new data source.
4. Specify a user name and password to connect to the SQL Server data source that you just set up.  
The directory is then created and populates with a basic Ascential MetaStage schema.

## Task 3-5-3: Completing Setup of an Oracle Data Source

When you choose to create an Oracle data source in the Create New Data Source, the Oracle ODBC Driver Setup dialog box appears. It requests information for logging in to the Oracle database that you intend to use to host the MetaStage directory.

To complete setup of an Oracle data source:

1. Supply the following information:
  - Data Source Name – The data source name used to connect to the data source.
  - Description – An optional description of the data source.
  - Service Name – The name of the connection created in the Oracle Net8 Assistant.
  - UserID – The Oracle ID that owns the directory.
2. Accept the defaults for the other fields.
3. Click OK.
4. In the Select Data Source dialog box, click OK again.  
The Oracle ODBC Driver Connect dialog box appears, requesting connection details for the database.
5. Enter the password to connect to the database.
6. Click OK.  
The TableSpace for Oracle MetaStage Directory dialog box appears.
7. In the TableSpace for Oracle MetaStage Directory dialog box, do one of the following:

- To specify the tablespace, follow the procedure in “Specifying the Tablespace for an Oracle Database” in the *Ascential MetaStage Administrator's Guide*.
- To connect to the database without specifying a tablespace, click OK.

The Directory Administrator connects to the database, creates the directory, and then populates it with a basic Ascential MetaStage schema.

## Task 3-5-4: Completing Setup of a DB2 Data Source

When you choose to create a DB2 data source in the Create New Data Source wizard, the IBM DB2 ODBC Driver - Add dialog box appears. This dialog box requests information to create an ODBC connection to the DB2 database that you plan to use to host the Ascential MetaStage directory.

To complete the setup of a DB2 data source:

1. Supply the following information:
  - Data Source Name – The data source name used to connect to the data source.
  - Database Alias – This identifies the DB2 database you want to connect to.
  - Description – A description of the data source.

2. Click OK.

The Connect to DB2 Database dialog box appears and requests connection details for the database.

3. Supply the following information:
  - User ID – The name to use for connecting to the database.
  - Password – The password for connecting to that database.
  - Connection Mode – Accept the default setting of Share.

4. Click OK.

The TableSpace for DB2 MetaStage Directory dialog box appears.

5. In the TableSpace for DB2 MetaStage Directory dialog box, do one of the following:
  - To specify the tablespace, follow the procedure in “Specifying the Tablespace for a DB2 Database” in the *Ascential MetaStage Administrator's Guide*.
  - To connect to the database without specifying a tablespace, click OK.

The Directory Administrator connects to the database, creates the directory, and then populates it with a basic Ascential MetaStage schema.

---

## Task 3-6: Populating the Ascential MetaStage Directory

To populate the Ascential MetaStage directory:

1. After you successfully define the data source that will host the Ascential MetaStage directory, and you make a connection to it, the Directory Administration populates the directory with basic Ascential MetaStage objects.

The Directory Administrator dialog box displays the progress of the population.

2. Click Close, after the directory is created.

3. Use the Ascential MetaStage Explorer to connect to the directory, as described in “Starting MetaStage” in the *Ascential MetaStage User’s Guide*.

## APPENDIX A

# Installing Business Objects XIR2 Sample Reports and Utilities

This appendix discusses:

- Prerequisites
- Copying and Extracting the Universes using the BusinessObjects Import Wizard
- Editing the Universe Connection Information for the PeopleSoft EPM Database
- Accessing the PeopleSoft EPM WebIntelligence Documents Using BusinessObjects InfoView

This appendix outlines the components and steps necessary to utilize the Business Objects universes and report templates that support the following data mart warehouses:

- PeopleSoft Enterprise CRM Warehouse
- PeopleSoft Enterprise Financials Warehouse
- PeopleSoft Enterprise HRMS Warehouse
- PeopleSoft Enterprise Supply Chain Warehouse

This is an optional installation and assumes that you have installed and configured the following Business Objects products and related components:

- BusinessObjects Import Wizard
- BusinessObjects Supervisor
- BusinessObjects Designer
- BusinessObjects WebIntelligence
- BusinessObjects Repository

These installation and configuration instructions describe how to:

- Install the BusinessObjects universes and report templates for the PeopleSoft data marts.
- Edit the BusinessObjects universe connection information to point to your PeopleSoft EPM database.
- Access the PeopleSoft EPM BusinessObjects WebIntelligence documents using BusinessObjects Info View.

---

## Prerequisites

Before you begin your PeopleSoft EPM installation, ensure that these requirements are met:

- You have installed the BusinessObjects XIR2 application.

- You have downloaded and applied these BusinessObjects hot fixes from the vendor's FTP site:
  - Hotfix windows
  - Bobjxir2MHF1
  - Bobjxir2CHF1
- You have downloaded and applied any additional updates and fixes that are posted to date.

Download and apply the contents of the zip file to your server and your client server.

Run the setup.exe program and select the default settings.

---

## Task A-1: Copying and Extracting the Universes using the BusinessObjects Import Wizard

This section discusses:

- Using the BusinessObjects Import Wizard
- Selecting the Source Environment
- Selecting the Destination Environment
- Selecting Objects to Import
- Selecting the Categories to Import
- Selecting the Folders and Objects to Import
- Selecting the Universe Folders and Universes to Import

This task describes how to copy the universe from a packaged Business Intelligence Archive Repository (BIAR) file to your C:\temp directory.

### Task A-1-1: Using the BusinessObjects Import Wizard

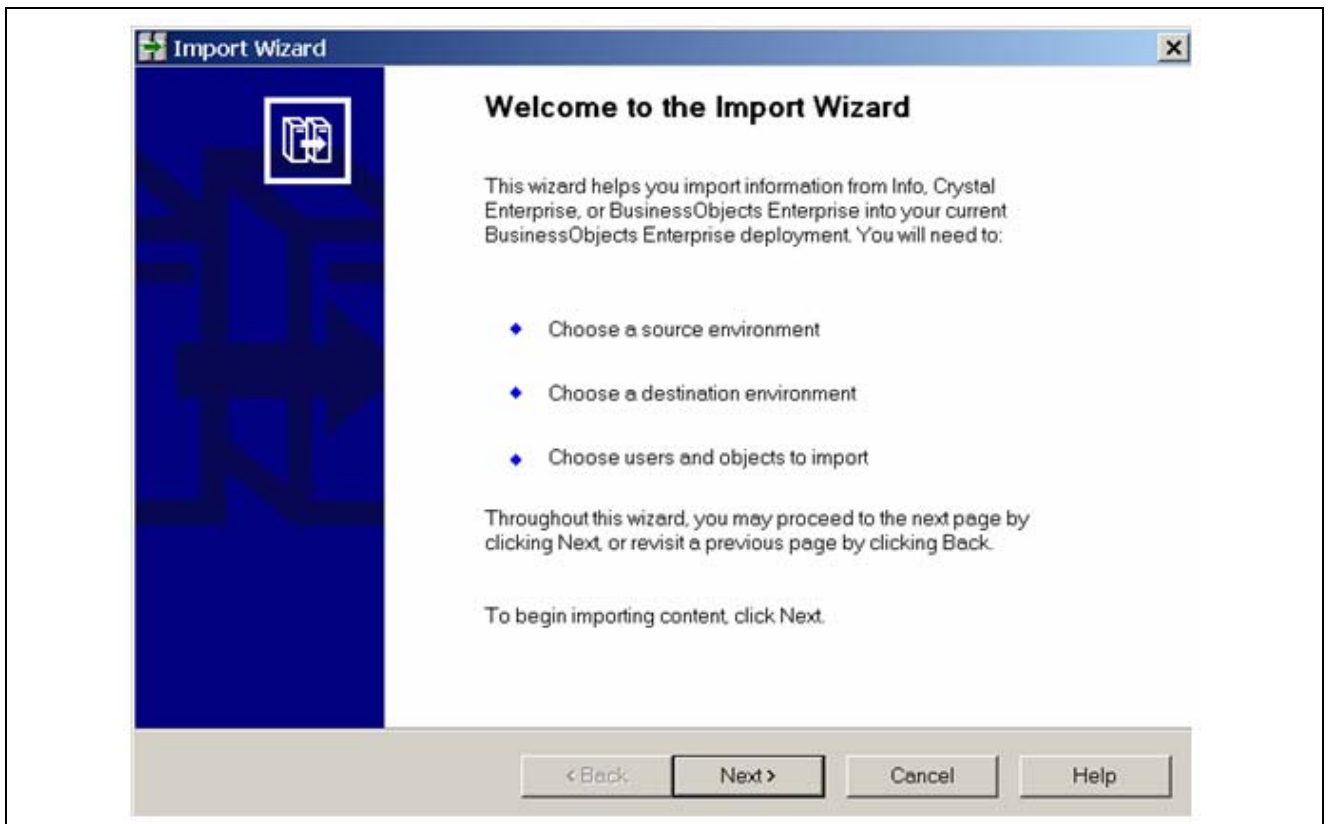
In this example, the delivered BIAR file is EPM9.BIAR. Use the BusinessObjects Import Wizard to assist you in the initial BusinessObjects installation and configuration.

The Import Wizard is a locally installed windows application that guides you through the process of importing users, groups, reports, and folders from an existing BusinessObjects Enterprise, Crystal Enterprise, or Crystal Info implementation to a BusinessObjects Enterprise system. You can use the BusinessObjects Import Wizard to import information into a BusinessObjects Enterprise system running on Microsoft Windows or UNIX operating system. For more information, refer to the BOBJ Admin Guide for Migration to XI (beginning of page 302).

To launch the BusinessObjects Import Wizard and begin your import:

1. Select Start, Programs, BusinessObjects XI Release 2, BusinessObjects Enterprise, Import Wizard.

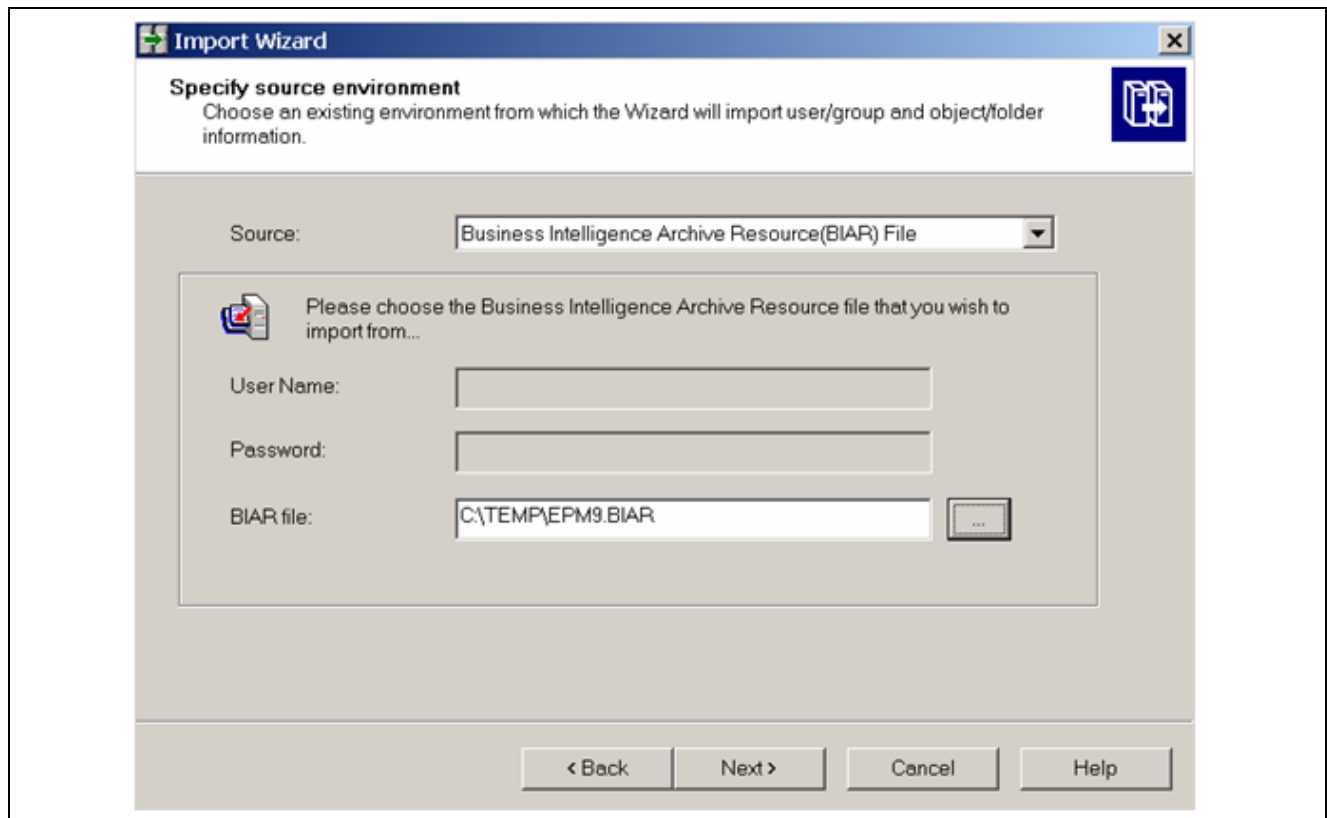
The BusinessObjects Import Wizard Welcome page appears:



BusinessObjects Import Wizard - Welcome page

2. Click the Next button to begin importing content.

During the installation process you can proceed to the next page by clicking the Next button, or return to the previous page by clicking the Back button.



BusinessObjects Import Wizard - Specify source environment page

## Task A-1-2: Selecting the Source Environment

To specify the source environment:

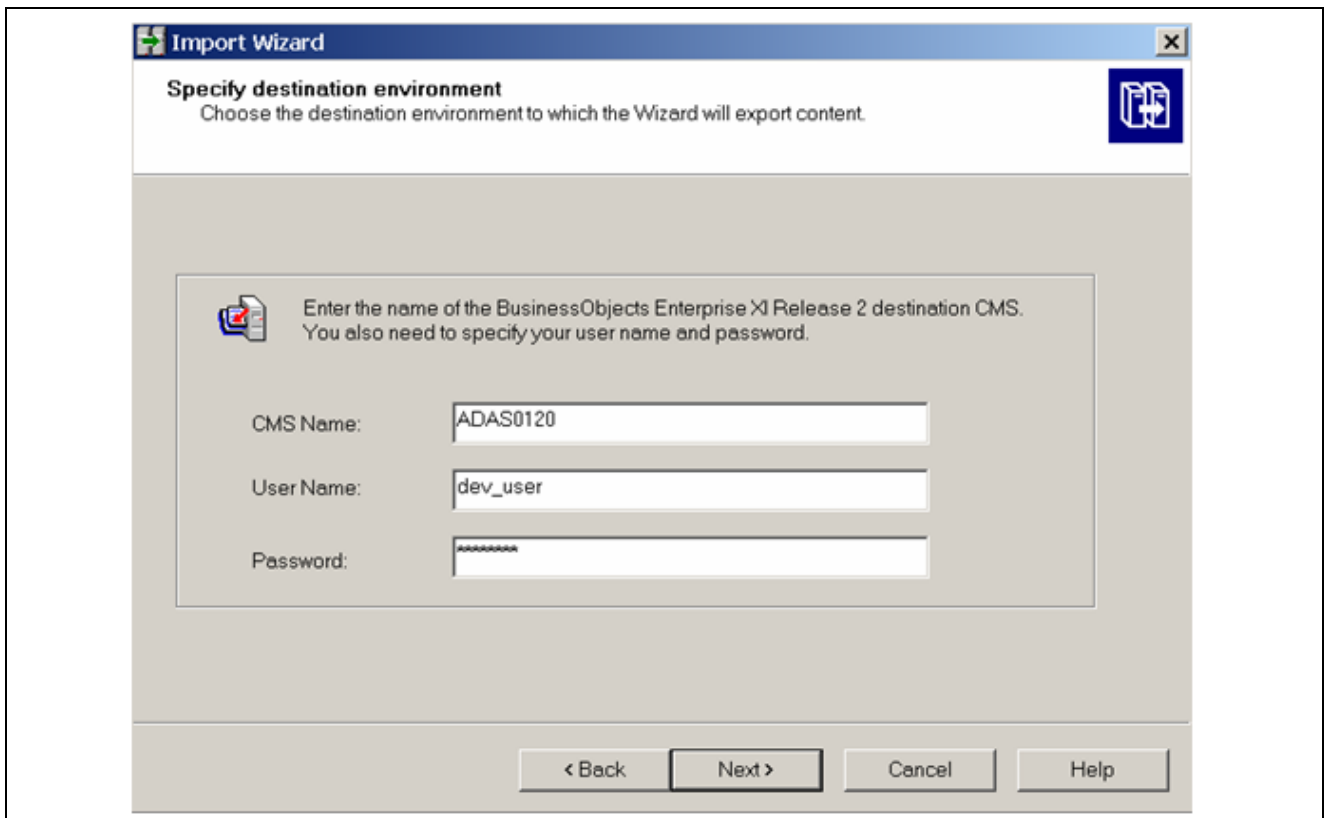
1. From the Source drop-down list box, select the Business Intelligence Archive Resources (BIAR) file that you want to import.

The source environment is where the wizard retrieves the user/group and object/folder information to import.

2. In the BIAR file field, enter the BIAR file location path. For example, *C:\TEMP\EPM9.BIAR*.
3. Click the Next button to continue.

The BusinessObjects Import Wizard - Specify destination environment page appears:





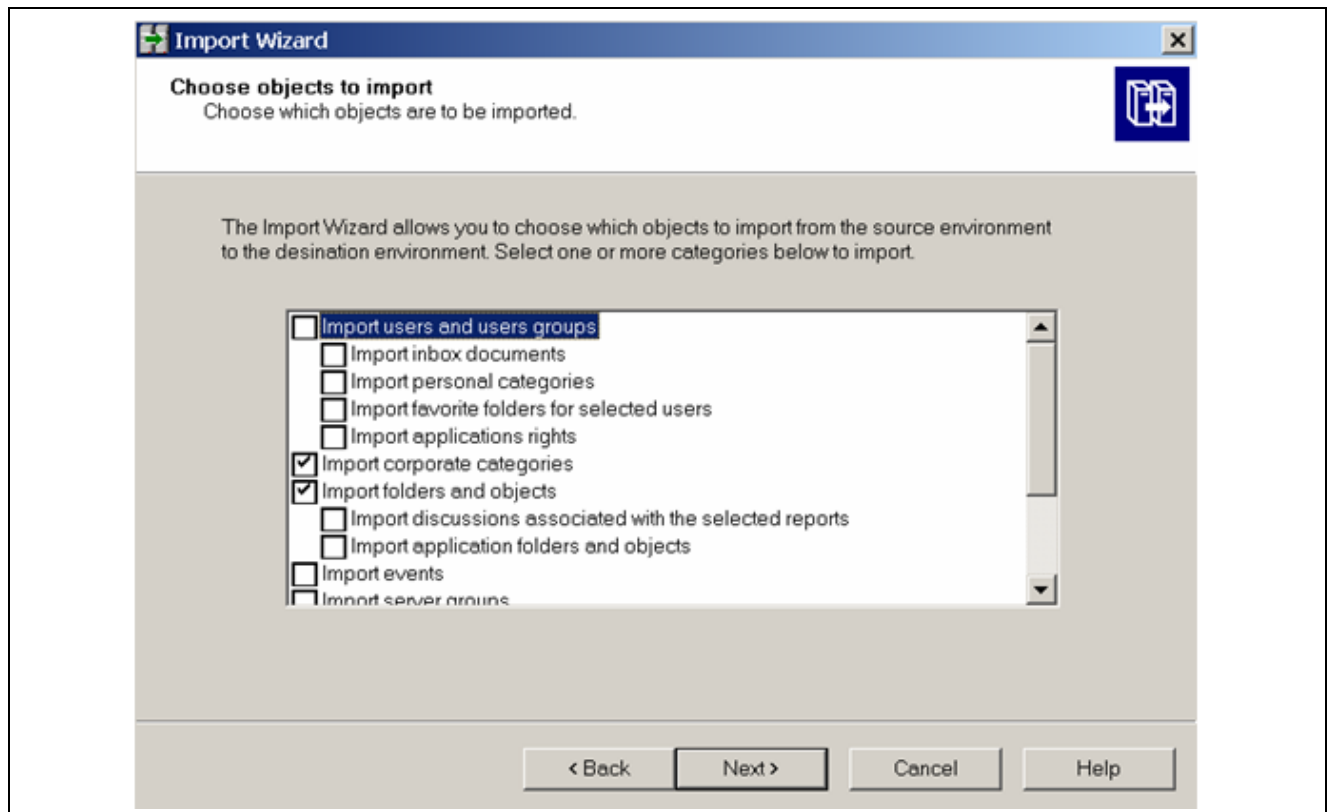
BusinessObjects Import Wizard - Specify destination environment page

## Task A-1-3: Selecting the Destination Environment

To specify the destination environment:

1. In the CMS Name field, enter the BIAR destination CMS. For example, *ADAS0120*.
2. In the User Name field, enter your user name.
3. In the Password field, enter your password.
4. Click the Next button to continue.

The BusinessObjects Import Wizard - Choose objects to import page appears:

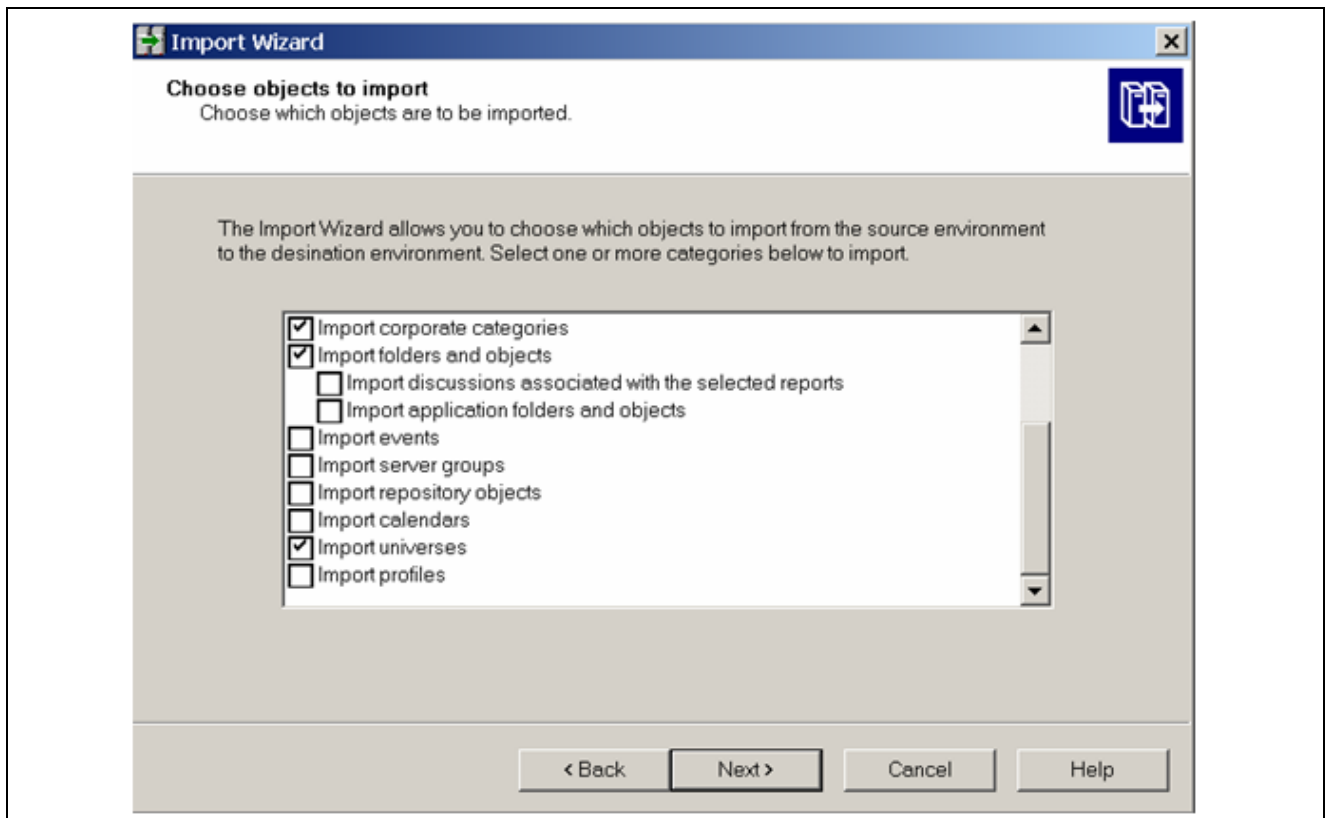


BusinessObjects Import Wizard - Choose objects to import page 1 of 2

## Task A-1-4: Selecting Objects to Import

To specify the objects to import:

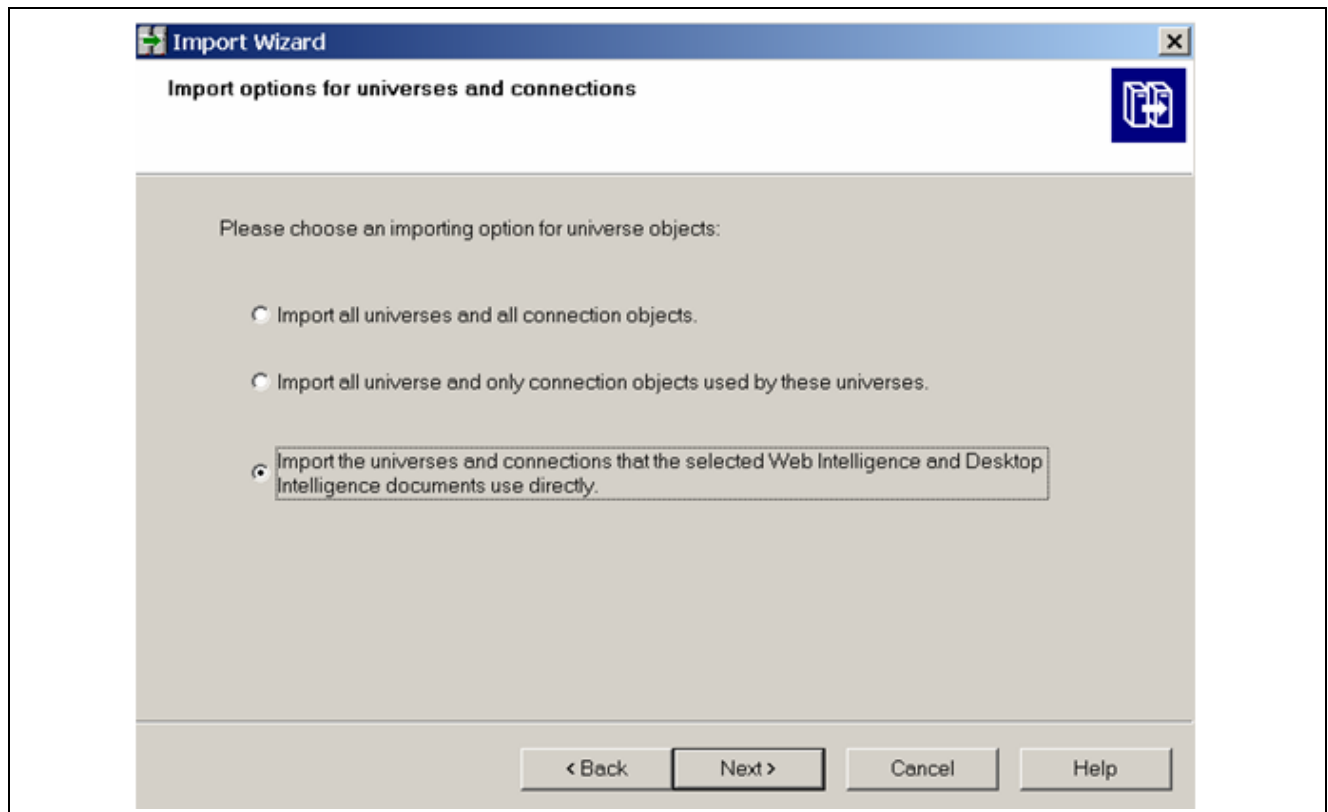
1. Select the check boxes for the objects that you want to import from the source environment to the destination environment.



BusinessObjects Import Wizard - Choose objects to import page 2 of 2

2. Use the scroll bar to scroll up or down to select the check boxes for the additional objects that you want to import.
3. Click the Next button to continue.

The BusinessObjects Import Wizard - Import options for universes and connections page appears:



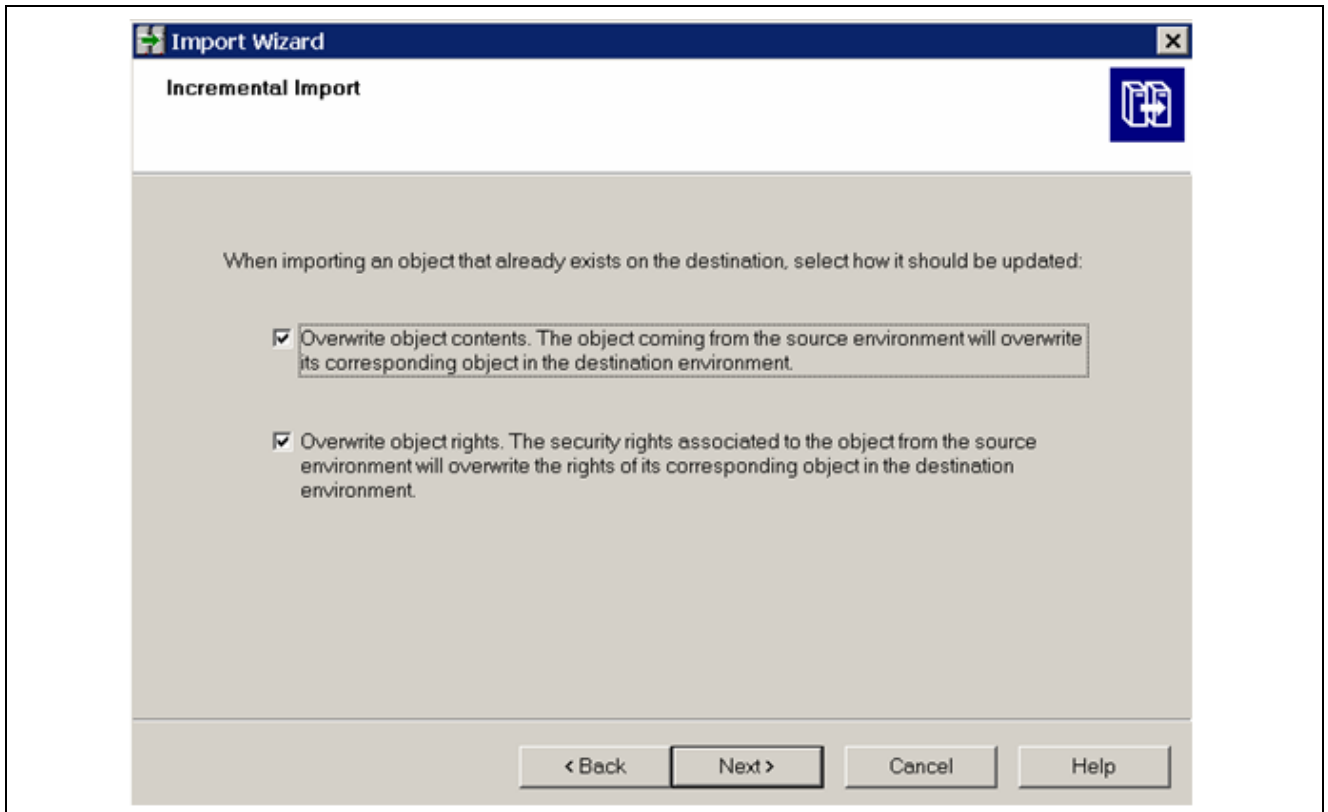
BusinessObjects Import Wizard - Import options for universes and connections page

4. Select the third option: Import the universes and connection objects that the selected Web Intelligence and Desktop Intelligence documents use directly.

This specifies the import option for the universe objects.

5. Click the Next button to continue.

The BusinessObjects Import Wizard - Incremental Import page appears:



BusinessObjects Import Wizard - Incremental Import selection page

6. Select the Overwrite object contents check box.

This specifies that the object that you are importing from the source environment overwrites the corresponding object in the destination environment.

---

**Note.** If any universe or report objects exist with the same name as the BIAR file, the *contents* will be overwritten.

---

7. Select the Overwrite object rights check box.

This specifies that the security rights of the object that you are importing from the source environment overwrite the rights of the corresponding object in the destination environment.

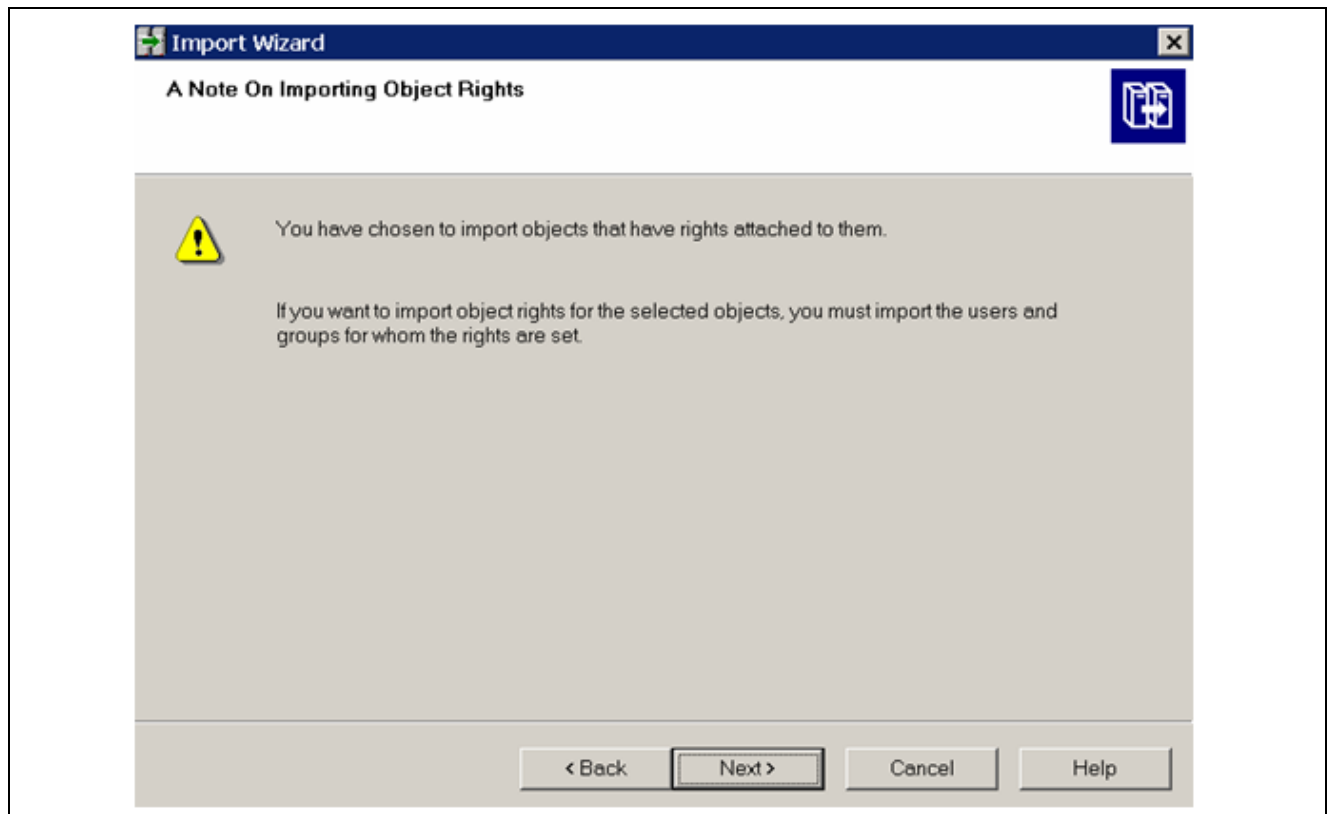
---

**Note.** If the universe or report objects exist with the same name as the BIAR file, the *rights* will be overwritten.

---

8. Click the Next button to continue.

The BusinessObjects Import Wizard - A Note On Importing Object Rights page appears:



BusinessObjects Import Wizard - A Note On Importing Object Rights page

This page warns you that you have selected import objects that have rights attached.

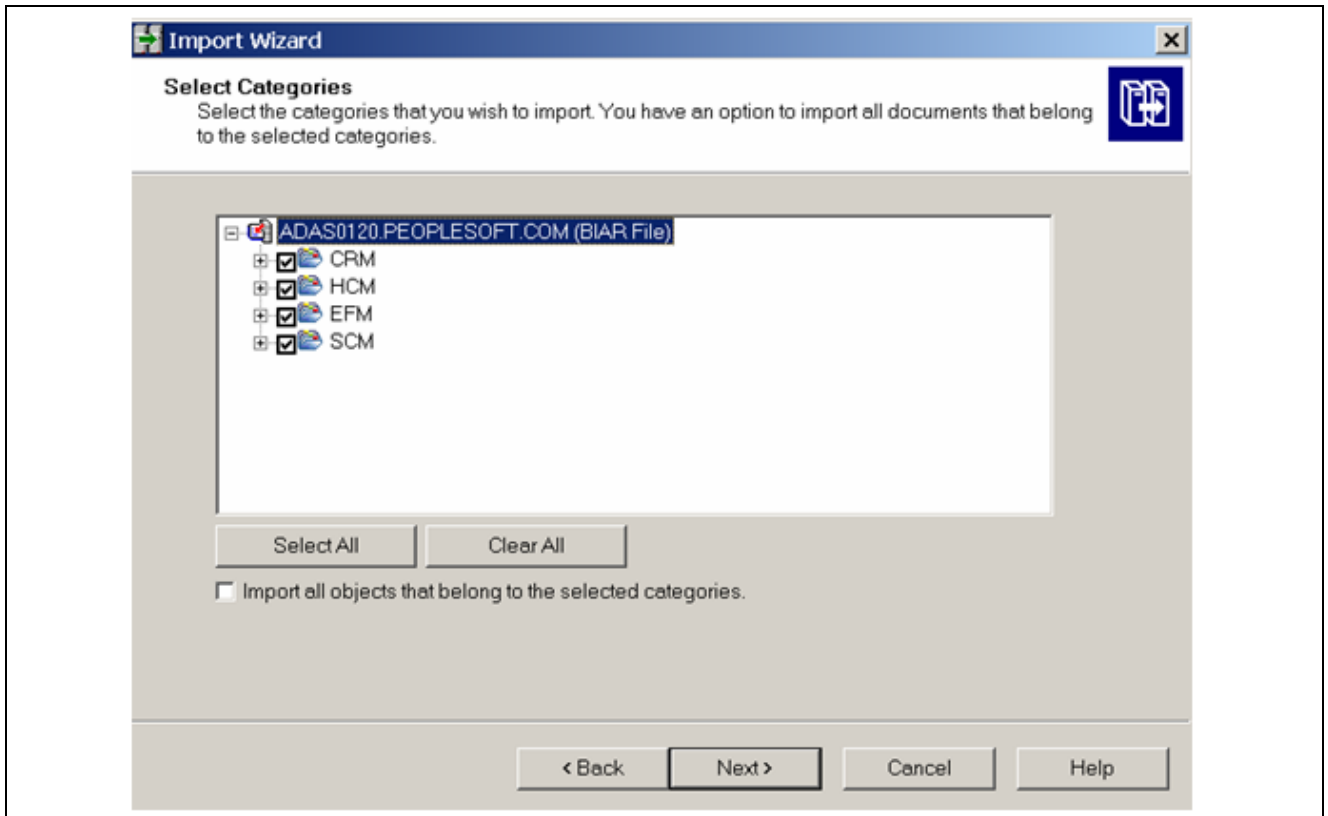
---

**Note.** If you want to import object rights for the selected objects, you must also import the corresponding users and groups.

---

9. Click the Next button to continue.

The BusinessObjects Import Wizard - Select Categories page appears:



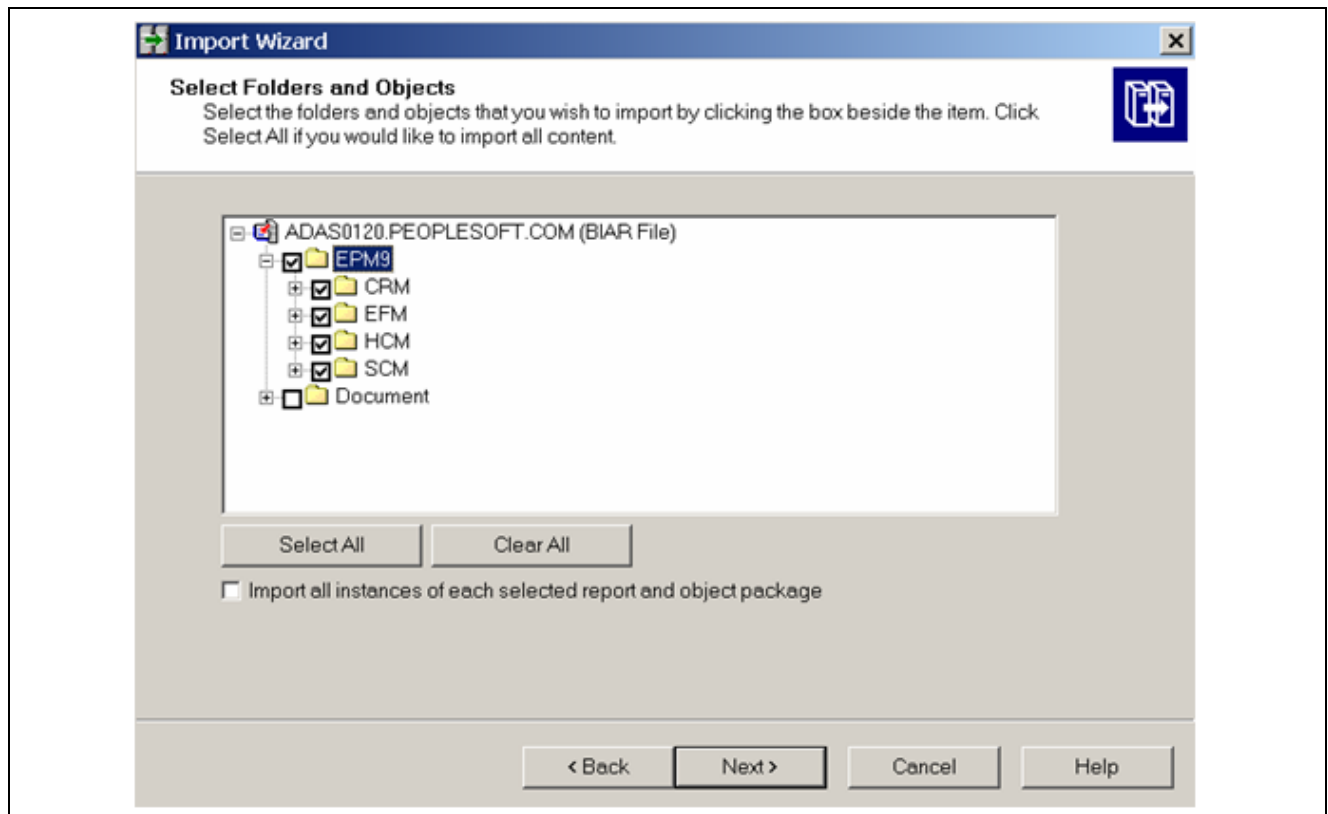
BusinessObjects Import Wizard - Select Categories page

## Task A-1-5: Selecting the Categories to Import

To specify the categories to import:

1. Select the check box for each category that you want to import. For example: CRM, HCM, EFM, SCM.
2. Clear the check box for Import all objects that belong to the selected categories, unless you want to import all documents that belong to the categories that you selected (CRM, HCM, EFM, SCM).
3. Click the Next button to continue.

The BusinessObjects Import Wizard - Select Folders and Objects page appears:



BusinessObjects Import Wizard - Select Folders and Objects page

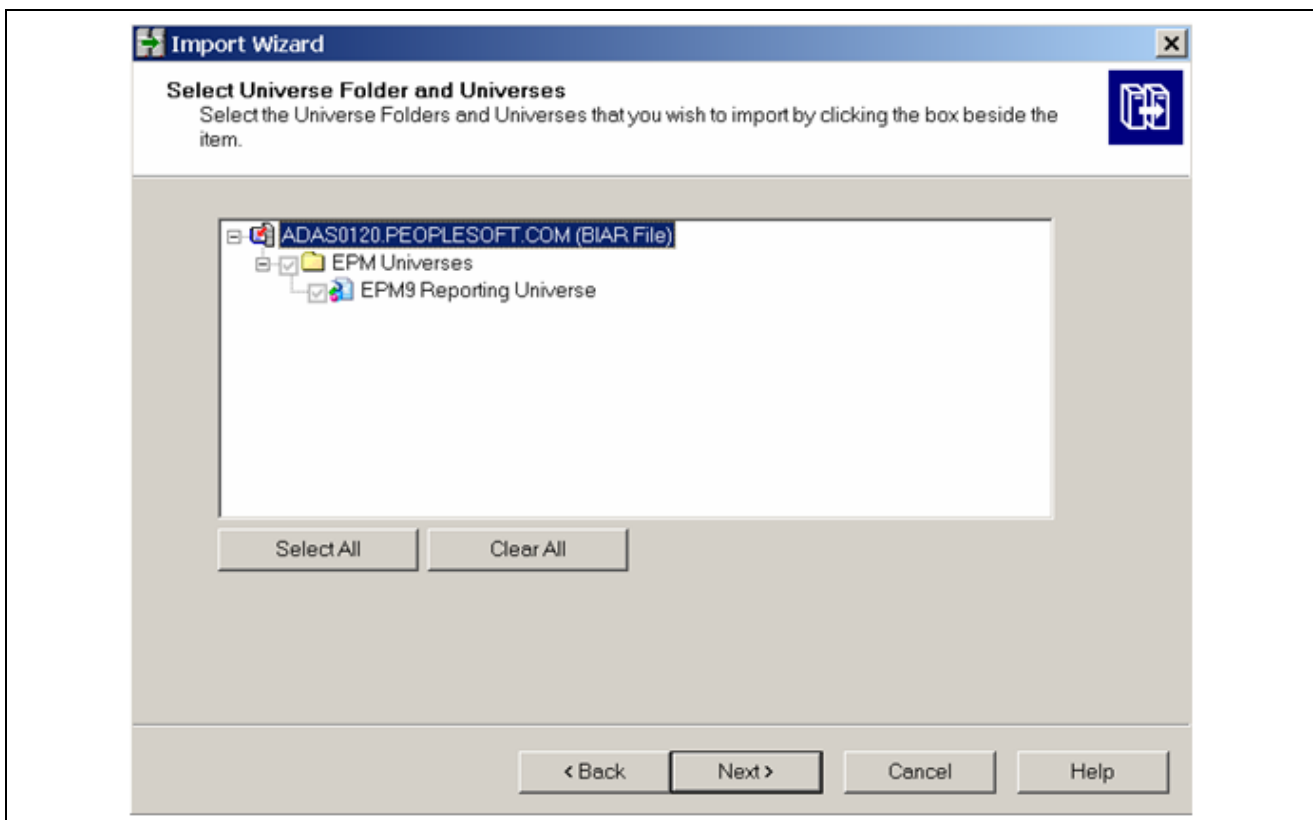
## Task A-1-6: Selecting the Folders and Objects to Import

To specify the folders and objects to import:

1. Expand your BIAR file folder so that you can see the sub folders.
2. Select the check boxes for the Folders and Objects that you want to import.
3. Clear the check box for Import all instances of each selected report and object package.
4. Click the Next button to continue.

The BusinessObjects Import Wizard - Select Universe Folder and Universes page appears:





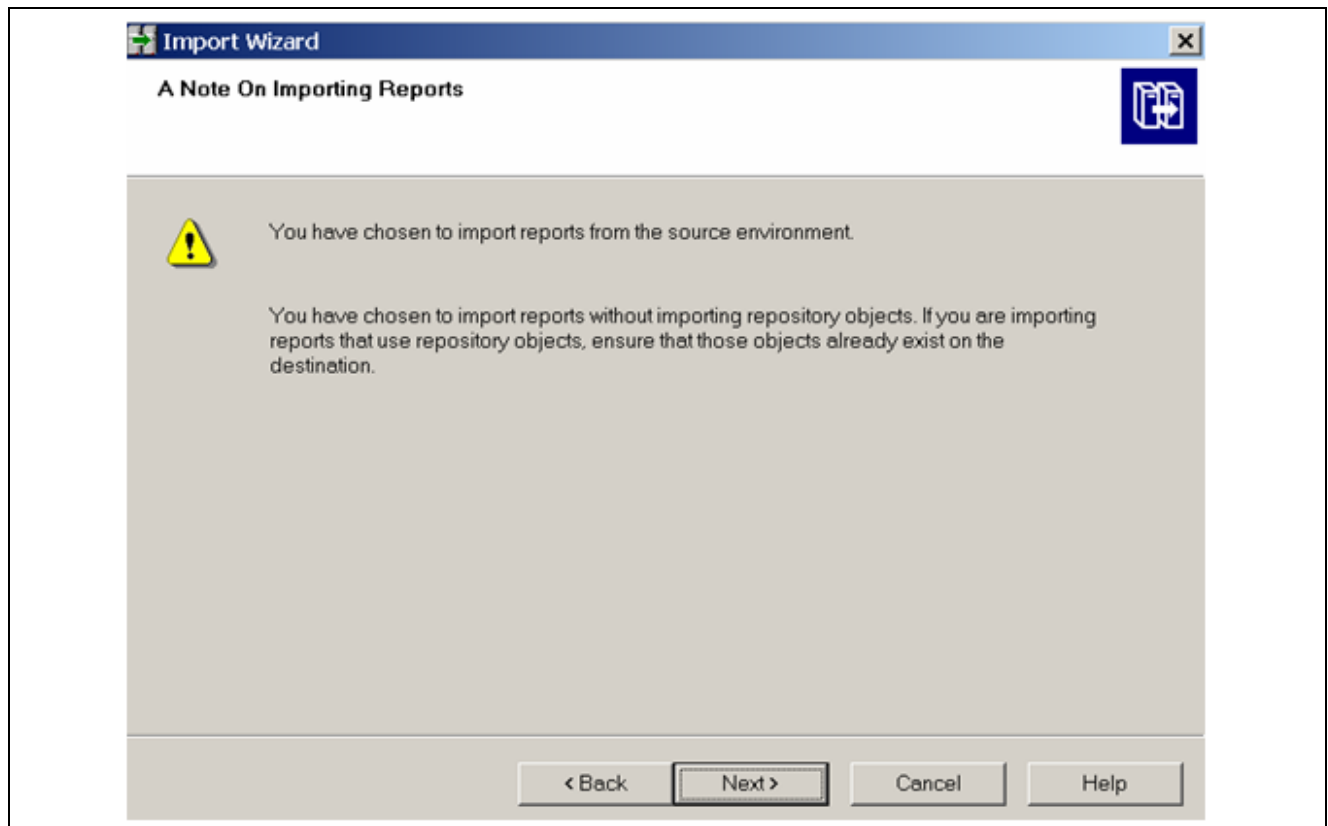
BusinessObjects Import Wizard - Select Universe Folder and Universes page

## Task A-1-7: Selecting the Universe Folders and Universes to Import

To specify the universe folders and universes to import:

1. Verify that the check boxes for the universes and universe folders that you want to import (from your BIAR file) are selected.
2. Click the Next button to continue.

The BusinessObjects Import Wizard - Note On Importing Reports page appears:



BusinessObjects Import Wizard - A Note On Importing Reports page

This page warns you that you have selected reports to import without importing their repository objects.

---

**Note.** If you are importing reports that use repository objects, you must ensure that those objects already exist in the destination environment.

---

3. Click the Next button to continue.

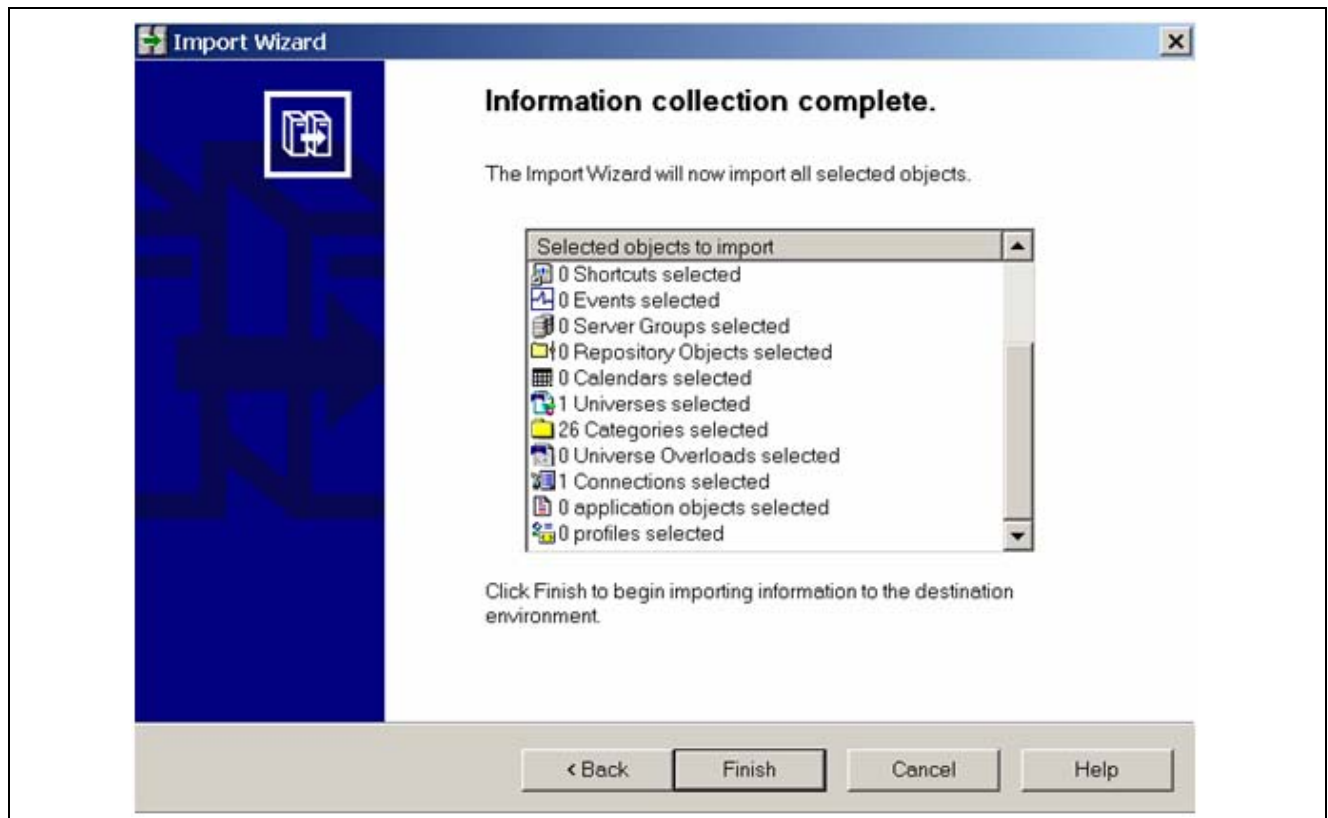
The BusinessObjects Import Wizard - Information collection complete page appears:



BusinessObjects Import Wizard - Information collection complete page 1 of 2

4. Verify the selected items to import.

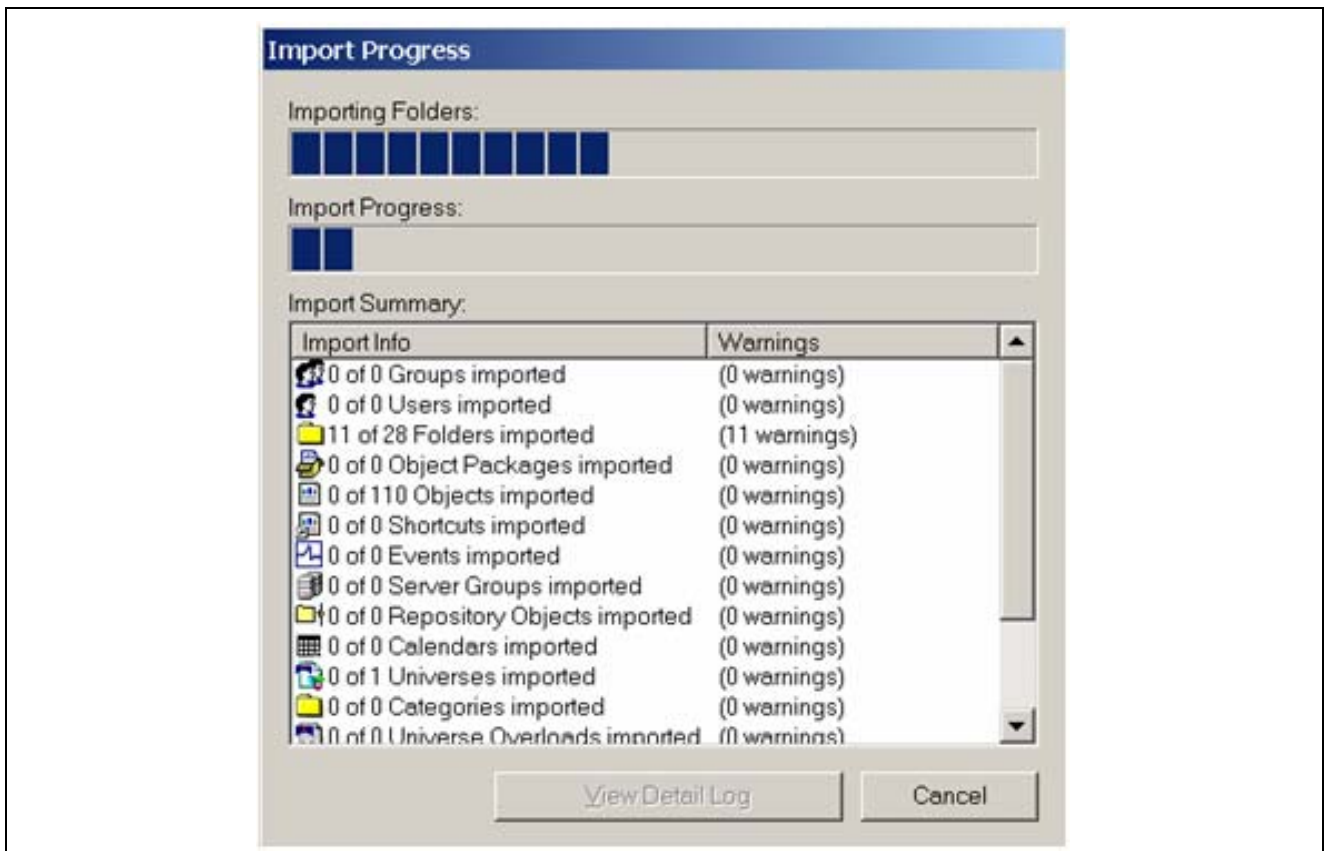
Use the scroll bar to scroll up or down to continue to review and verify additional import selections.



BusinessObjects Import Wizard - Information collection complete page 2 of 2

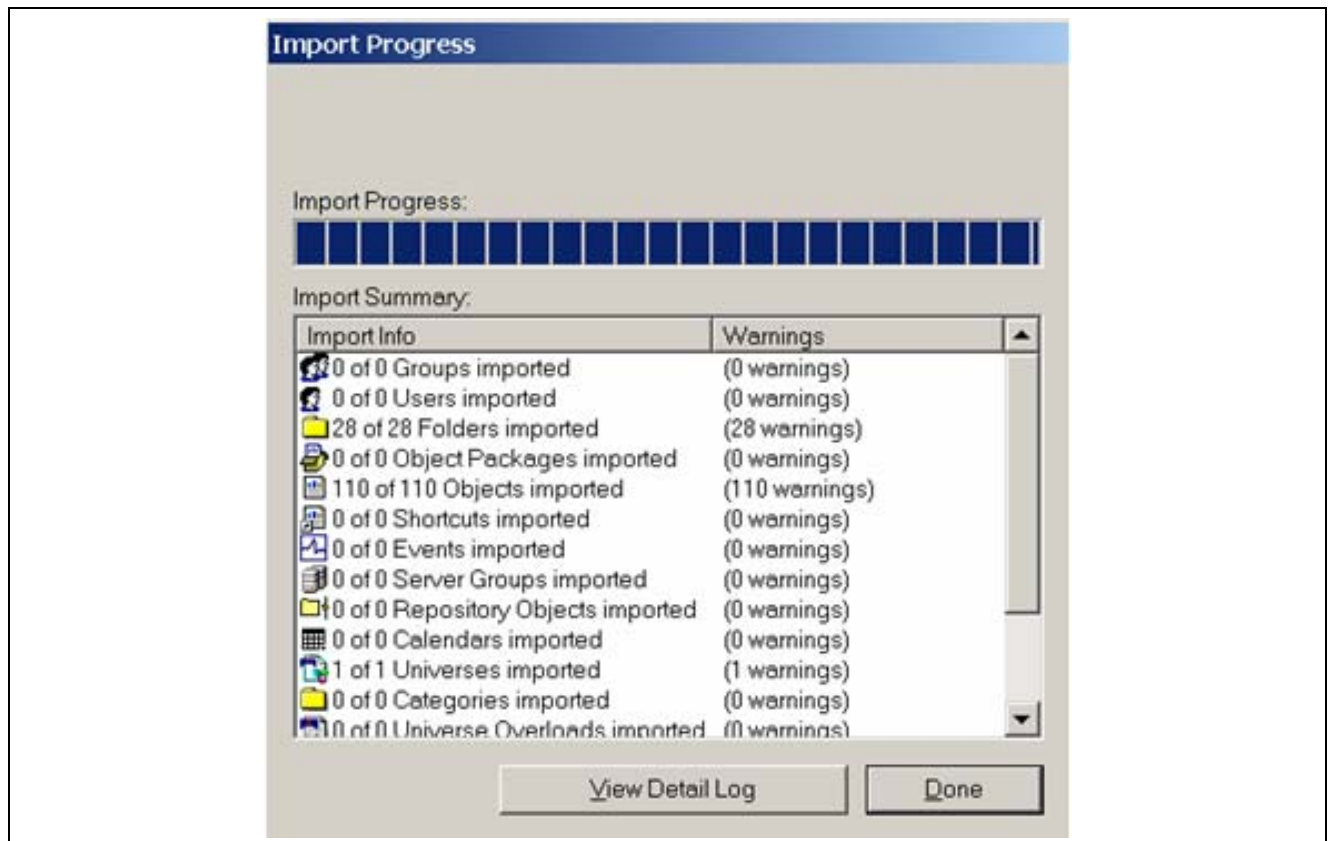
5. Click the Finish button to begin importing the selected information to the destination environment.

The BusinessObjects Import Wizard - Progress page appears:



BusinessObjects Import Wizard - Import Progress page 1 of 2

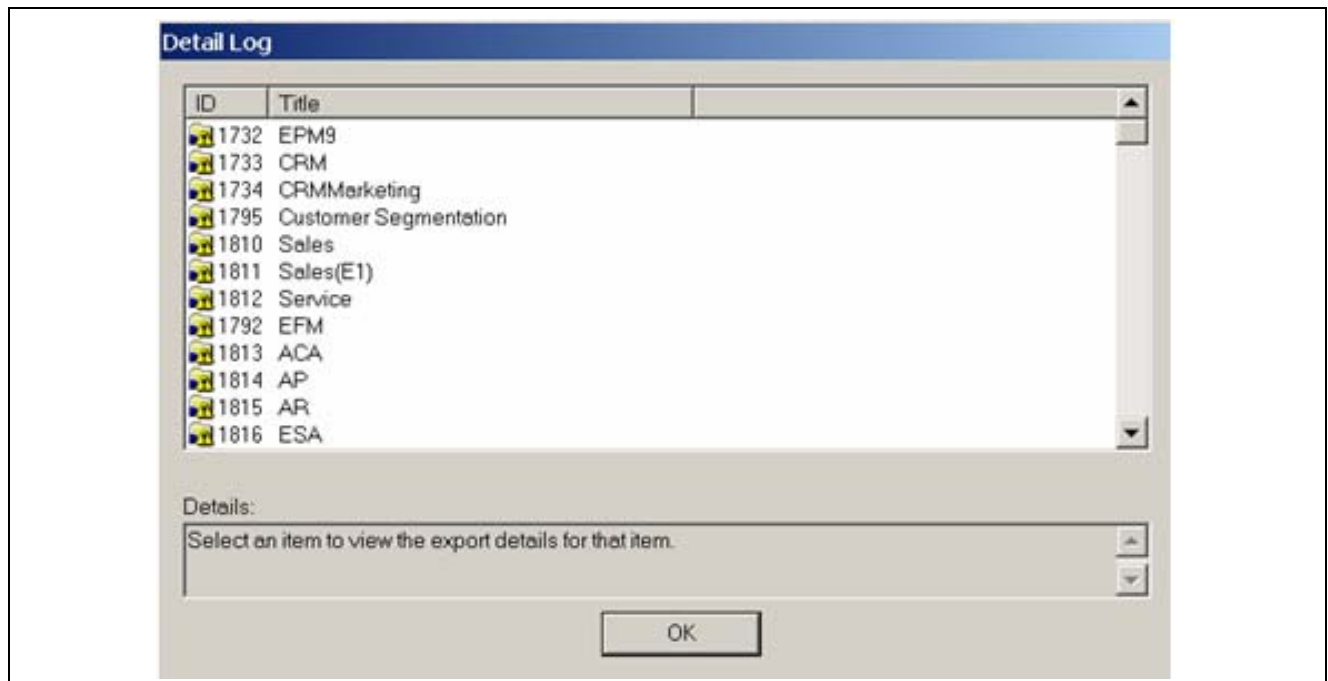
This page shows the import in progress. When the import completes, the View Detail Log button becomes active.



BusinessObjects Import Wizard - Import Progress page 2 of 2

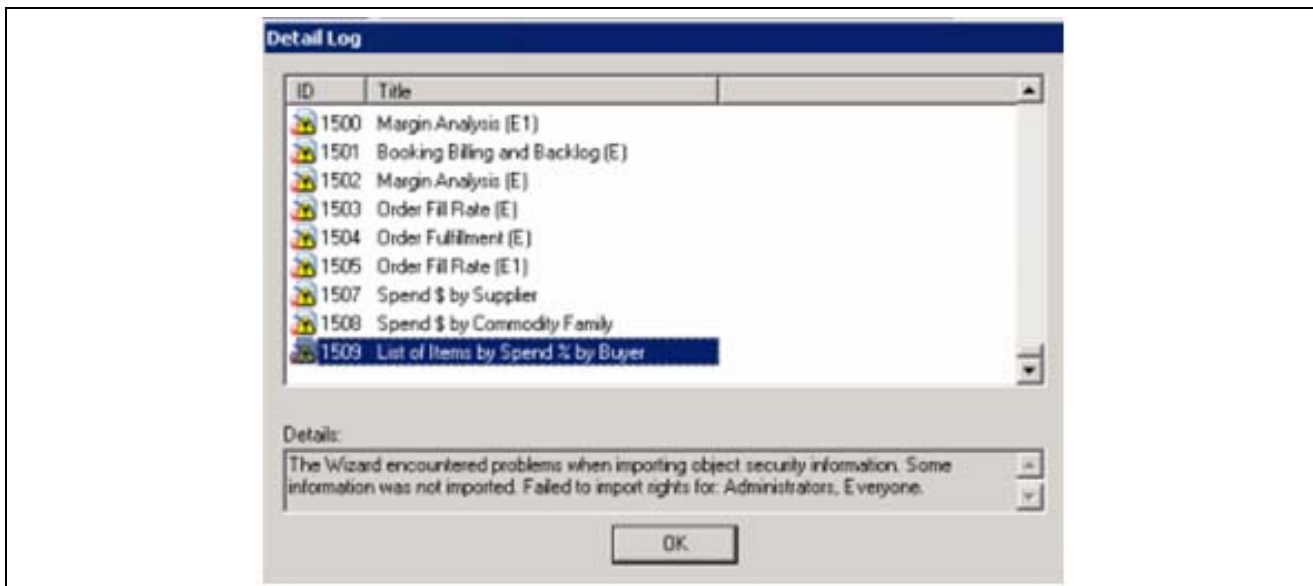
6. Click the View Detail Log button.

The Detail Log page appears:



BusinessObjects Import Wizard - Detail Log page 1 of 2

7. Scroll through the detail log to verify the folders that are in the list.
8. Select an item to view the export details for that item.



BusinessObjects Import Wizard - Detail Log page 2 of 2

The Details section may display this message:

*The Wizard encountered problems when importing object security information. Some information was not imported. Failed to import rights for: Administration, Everyone.*

9. You can ignore this message, it is only a warning.
10. Click OK to close the View Details log.
11. Click OK again to close the BusinessObjects Import Wizard.

This concludes your import.

## Task A-2: Editing the Universe Connection Information for the PeopleSoft EPM Database

This section discusses:

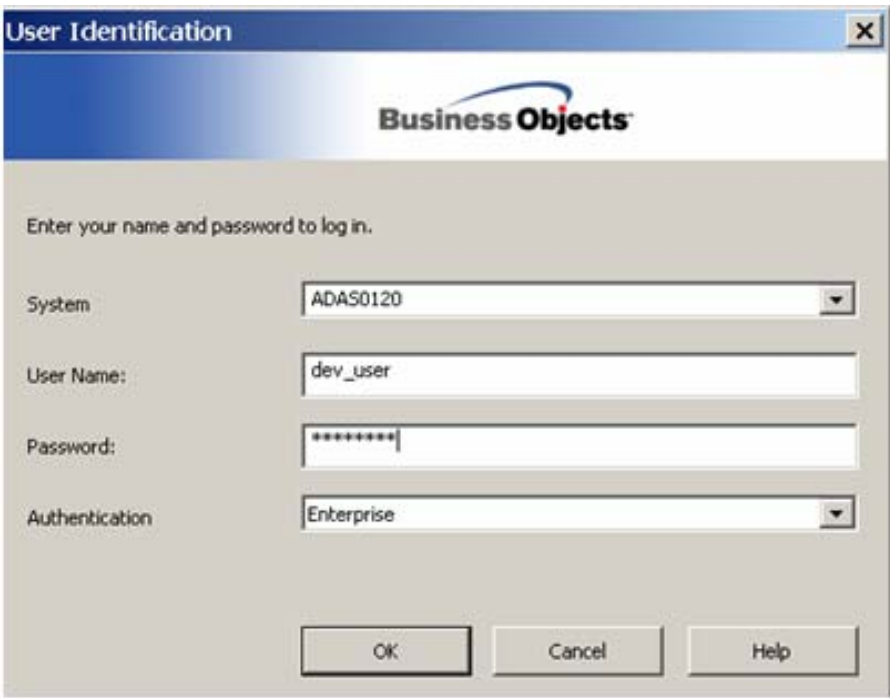
- Selecting a Universe Domain to Import
- Editing the Login Parameters to Access Your Middleware
- Testing the Data Source Server
- Defining Advanced and Custom Parameters
- Creating a New Universe Connection (Optional)
- Selecting the Target Universe Domain and Groups to Export

This task provides instructions for using BusinessObjects Designer to open the universe and edit the PeopleSoft EPM database parameters to point to your data source.

To launch BusinessObjects Designer to open the universe:

1. Select Start, BusinessObjects XI Release 2, BusinessObjects Enterprise, Designer.

The BusinessObjects User Identification - Log in page appears:

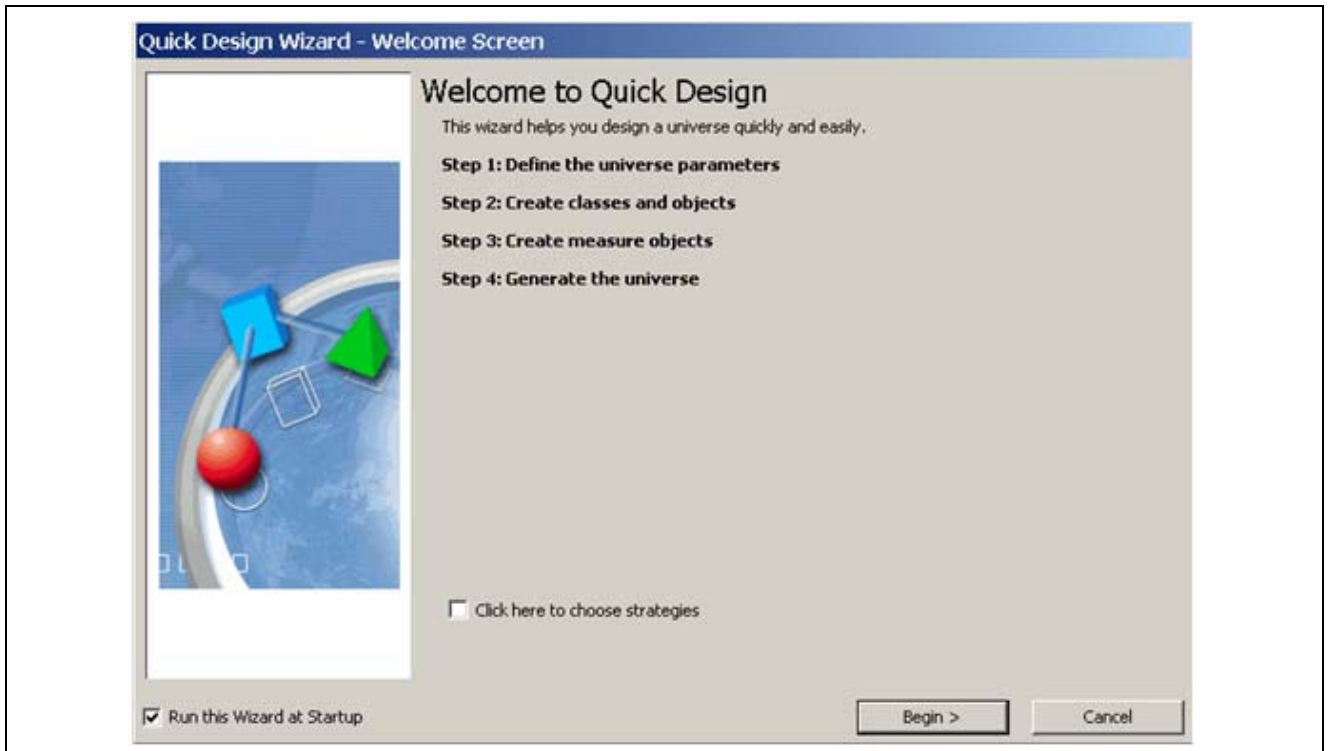
The image shows a 'User Identification' dialog box from Business Objects. The title bar says 'User Identification' with a close button. The Business Objects logo is at the top. Below the logo, it says 'Enter your name and password to log in.' There are four input fields: 'System' with a dropdown menu showing 'ADAS0120', 'User Name:' with a text box containing 'dev\_user', 'Password:' with a text box containing seven asterisks, and 'Authentication' with a dropdown menu showing 'Enterprise'. At the bottom are three buttons: 'OK', 'Cancel', and 'Help'.

BusinessObjects User Identification - Log in page

2. In the User Name and Password fields, enter your sign in credentials.
3. Click OK.

The BusinessObjects Quick Design Wizard - Welcome page appears:

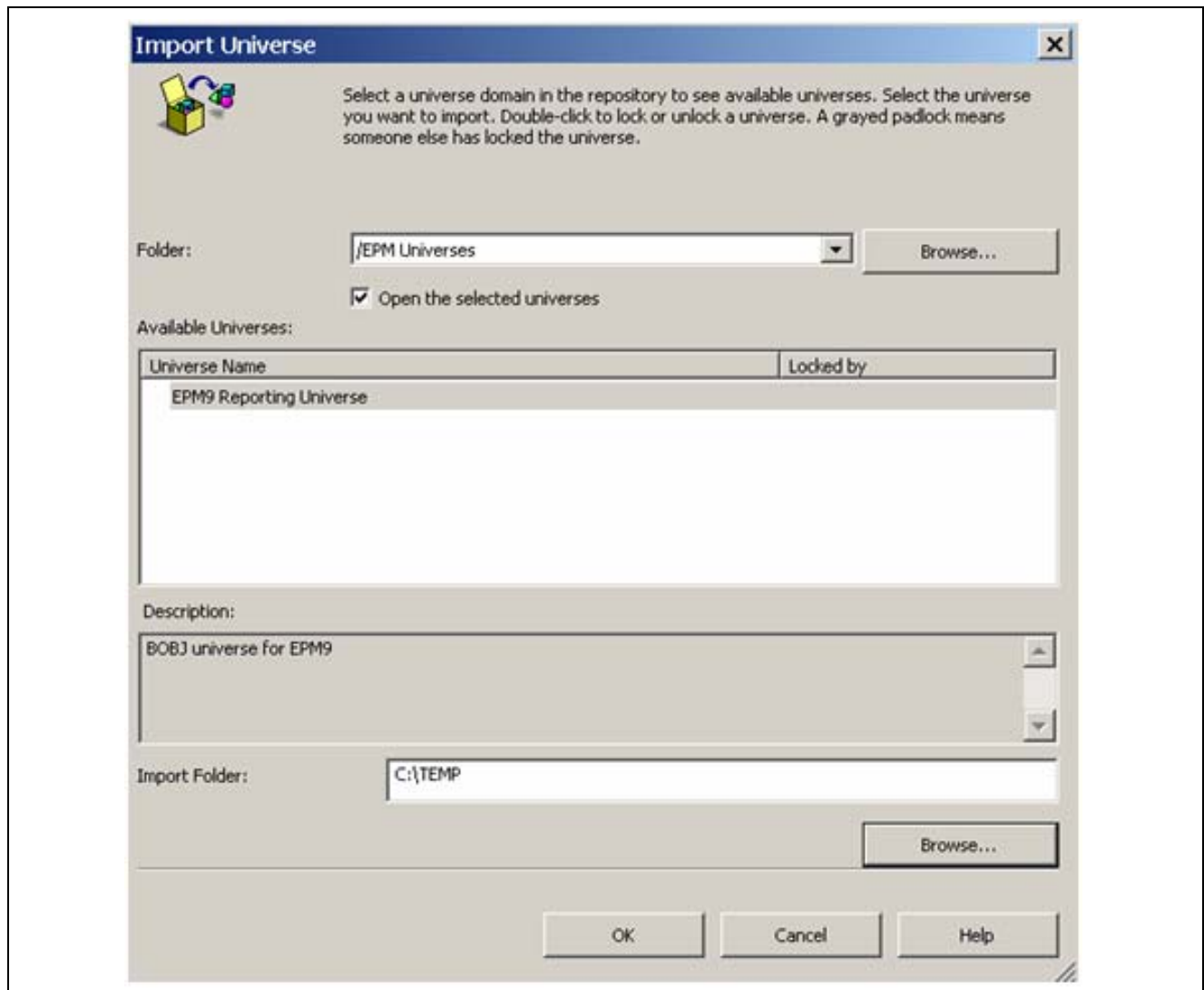




BusinessObjects Quick Design Wizard - Welcome page

4. Click the Cancel button to exit and close this page.
5. Select File, Import.

The BusinessObjects Import Wizard page appears:



BusinessObjects Import Wizard - Universe domain selection page

## Task A-2-1: Selecting a Universe Domain to Import

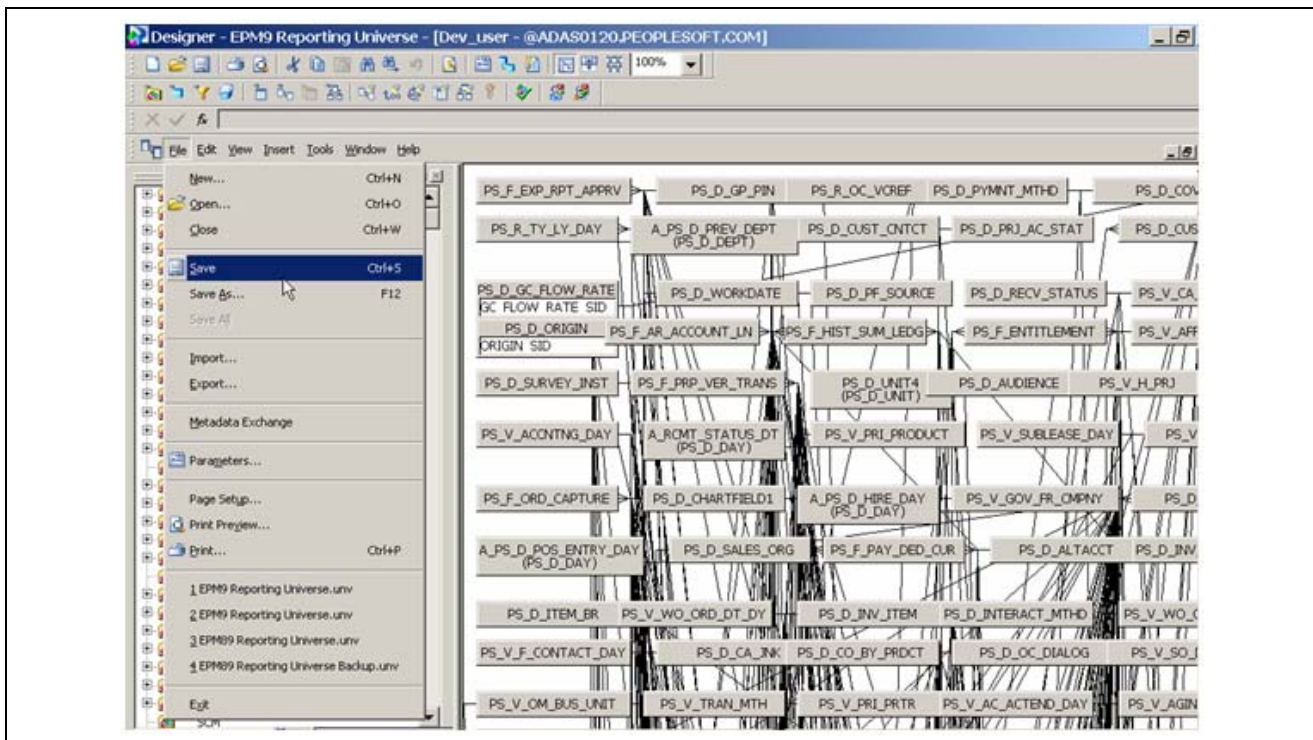
To select a universe domain to import:

1. In the Folder field, click the drop-down arrow or click the Browse button to select the location of your universe.
2. In the Import Folder field, enter the path or click the Browse button to select the location where you want to place a copy of the universe.
3. Click the OK button to import the universe.

The BusinessObjects Import Universe message “Universe successfully imported” appears.

4. Click the OK button and wait momentarily as the Universe loads to memory.

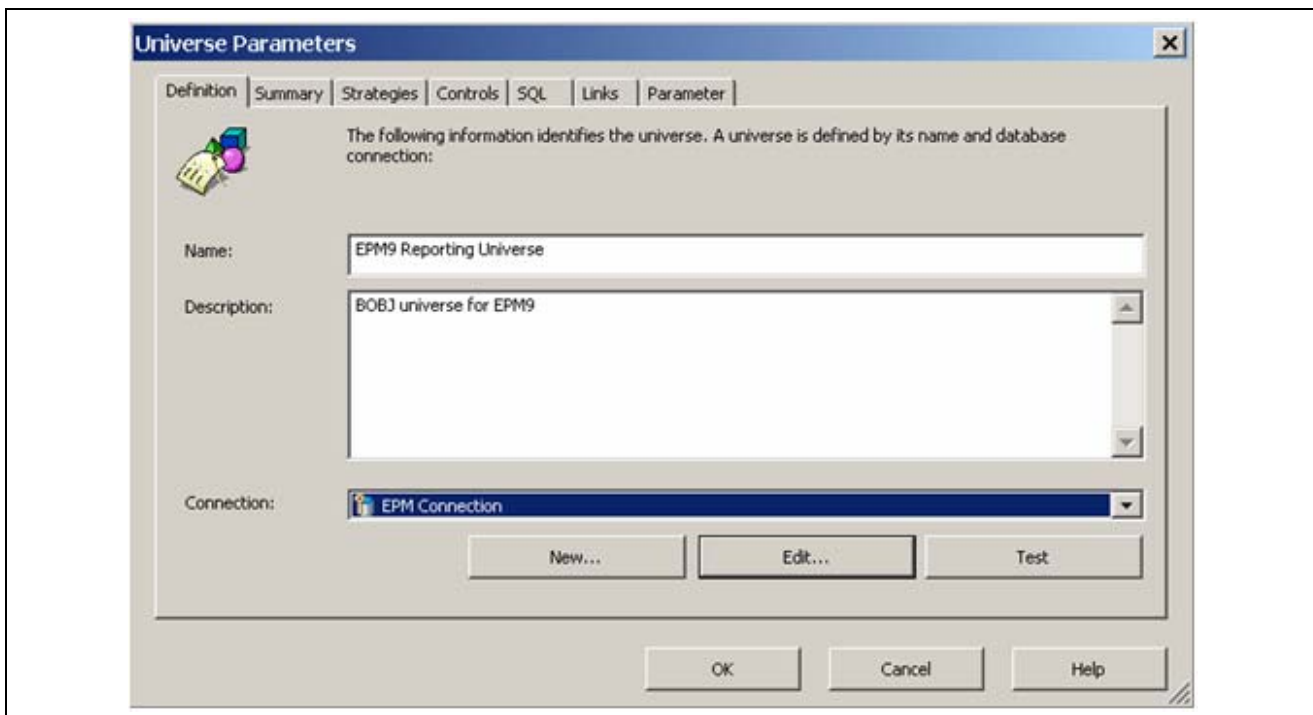
The BusinessObjects Designer - EPM9 Reporting Universe - [Dev\_user-@ADAS0120PEOPLESOF.COM] page appears:



BusinessObjects Designer - EPM9 Reporting Universe - [Dev\_user-@ADAS0120PEOPLESOFT.COM] page

## 5. Select File, Parameters.

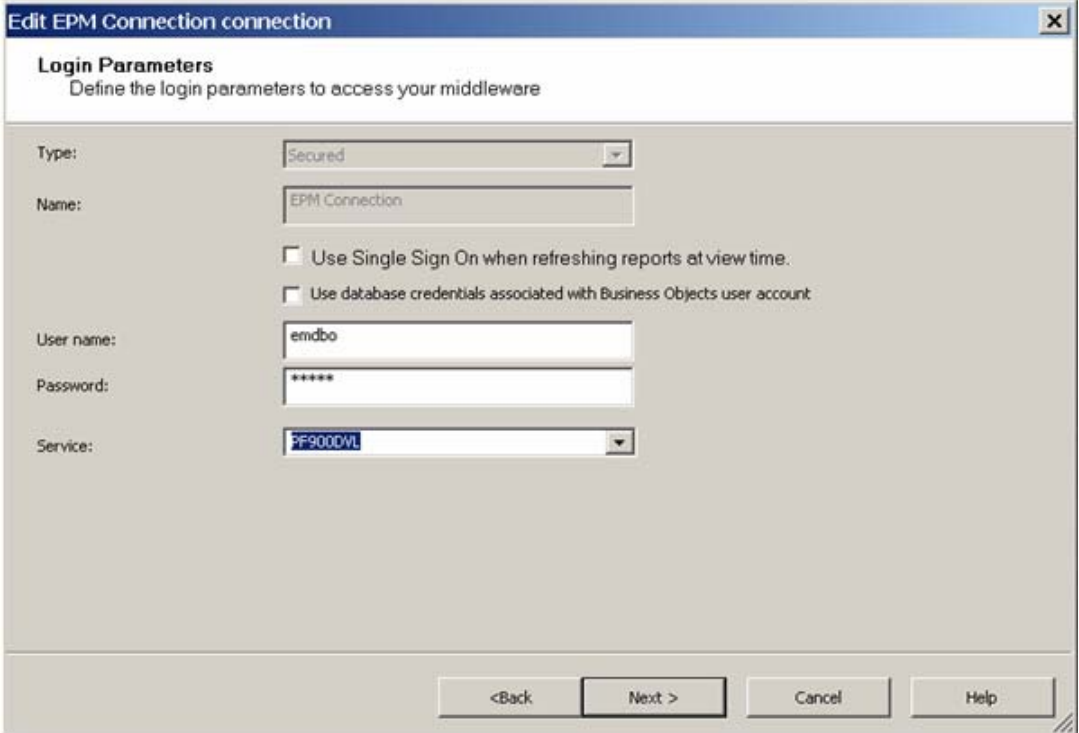
The BusinessObjects Designer - Universe Parameters page appears:



BusinessObjects Designer - Universe Parameters page

## 6. Click the Edit button.

The BusinessObjects Designer - Edit EPM Connection connection page appears:



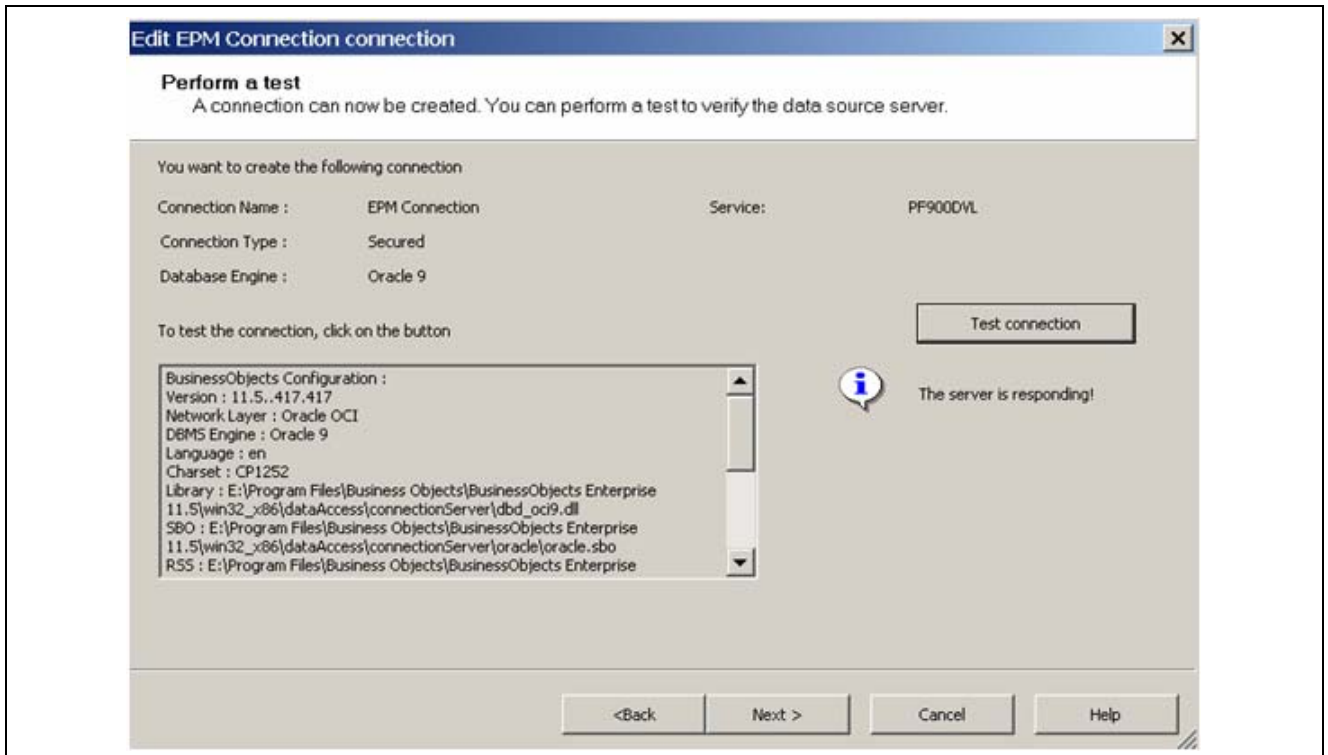
BusinessObjects Designer - Edit EPM Connection connection: Login Parameters page

## Task A-2-2: Editing the Login Parameters to Access Your Middleware

To define the login parameters to point to your PeopleSoft EPM database:

1. Edit these parameters:
  - a. User Name
  - b. Password
  - c. Service
2. Click the Next button to continue.

The BusinessObjects designer - Edit EPM Connection connection: Perform a test page appears:



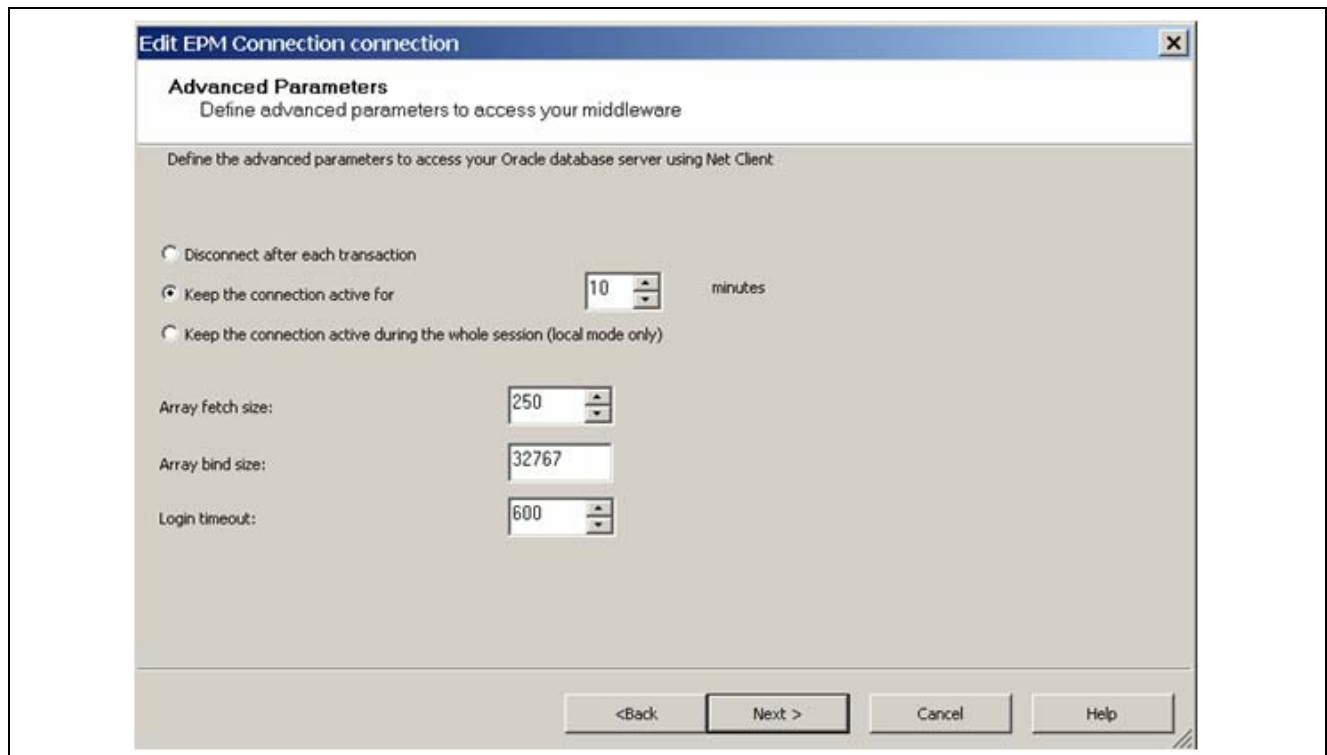
BusinessObjects Designer - Edit EPM Connection connection: Perform a test page

## Task A-2-3: Testing the Data Source Server

To create a connection and perform a server response test:

1. Click the Test Connection button to verify that the data source server connects and responds properly.
2. Verify that *"The server is responding!"* message appears.
3. Click the Next button to continue.

The BusinessObjects Designer - Edit EPM Connection connection: Advanced Parameters page appears:



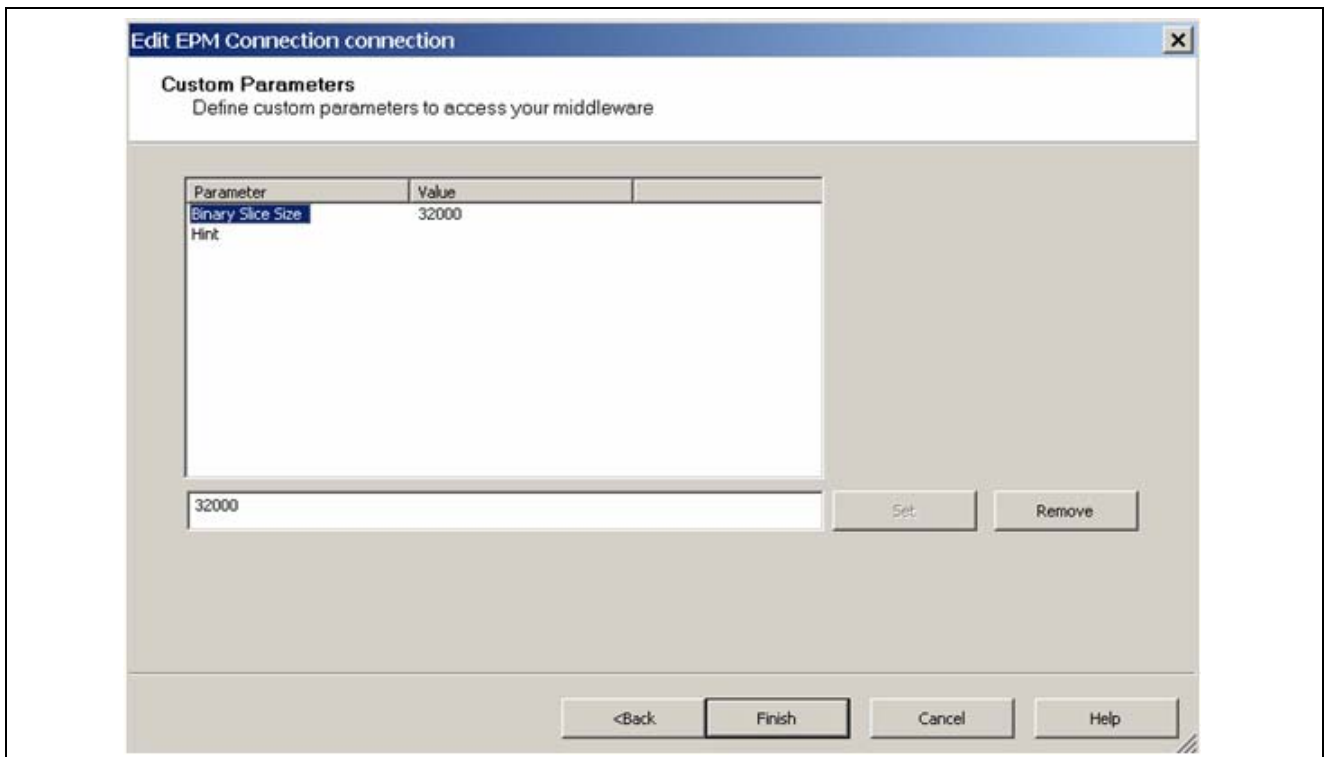
BusinessObjects Designer - Edit EPM Connection connection: Advanced Parameters page

## Task A-2-4: Defining Advanced and Custom Parameters

To define the advanced parameters to access your middleware:

1. Edit these advanced parameters to define access to your Oracle database server using Net Client:
  - Disconnect after each transaction
  - Keep the connection active (specify duration in minutes)
  - Keep the connection active during the whole session (local mode only)
  - Array fetch size
  - Array bind size
  - Login timeout
2. Click the Next button to continue.

The BusinessObjects Designer - Edit PM Connection connection: Custom Parameters page appears:

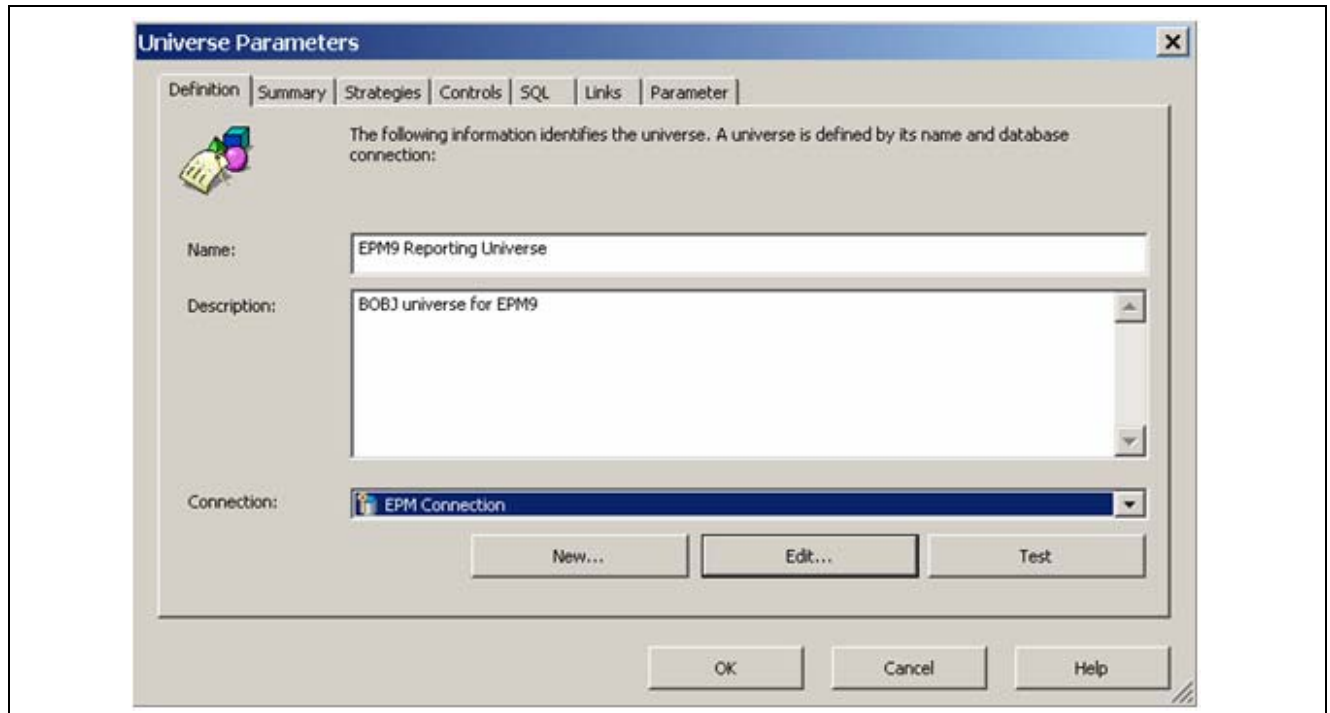


BusinessObjects Designer - Edit EPM Connection connection: Custom Parameters page

To define the custom parameters to access your middleware:

1. Edit these custom parameters to define access to your middleware:
  - Binary Slice Size (parameter and value)
  - Hint
2. Click the Finish button.

The BusinessObjects Designer - Universe Parameters page appears:



BusinessObjects Designer - Universe Parameters page

BusinessObjects Designer returns this page for you to create a New connection as necessary.

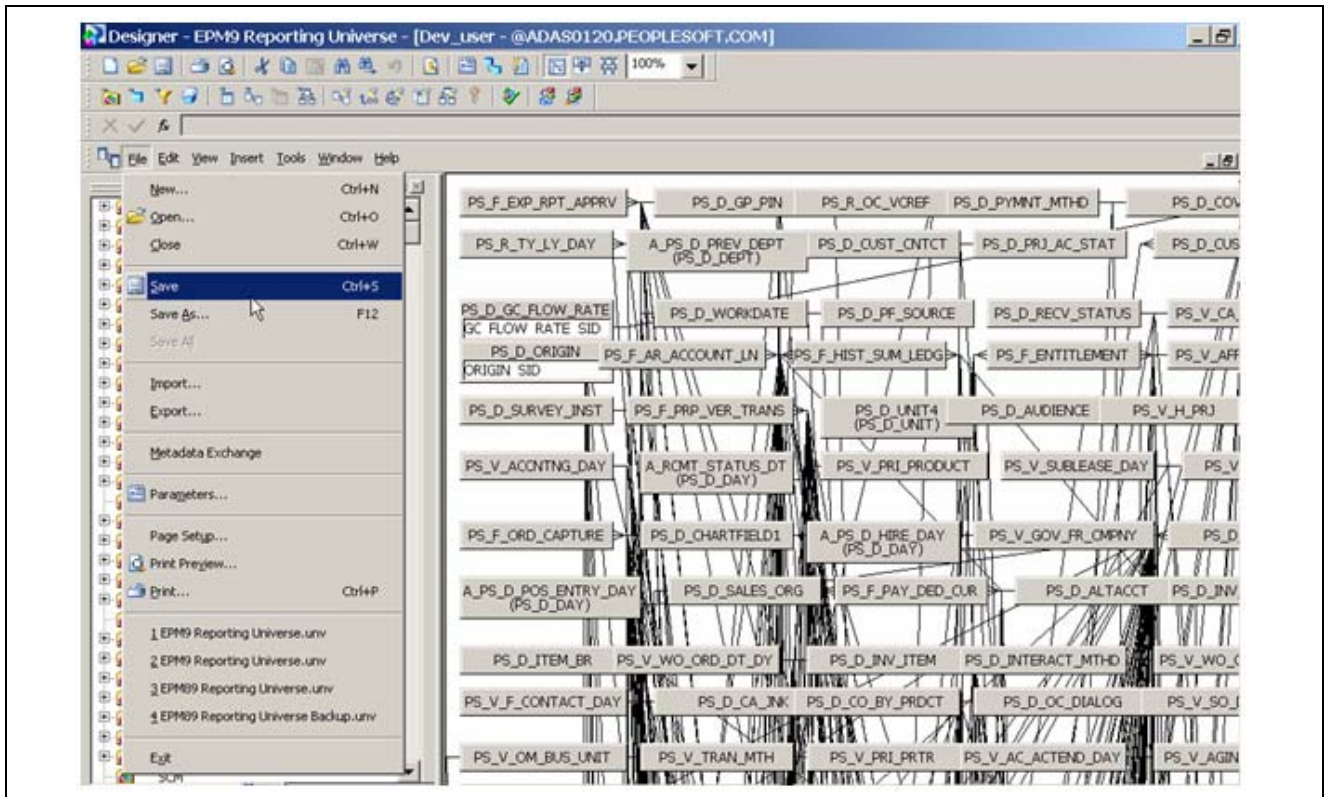
## Task A-2-5: Creating a New Universe Connection (Optional)

To create a new universe connection, do one of the following:

- If you want to create a new connection, click the New button and proceed with adding a new parameter.
- If you do *not* want to create a new connection, click the OK button to skip this page.

The BusinessObjects Designer - EPM9 Reporting Universe - [Dev\_user - @ADAS0120.PEOPLESOFT.COM] page appears:

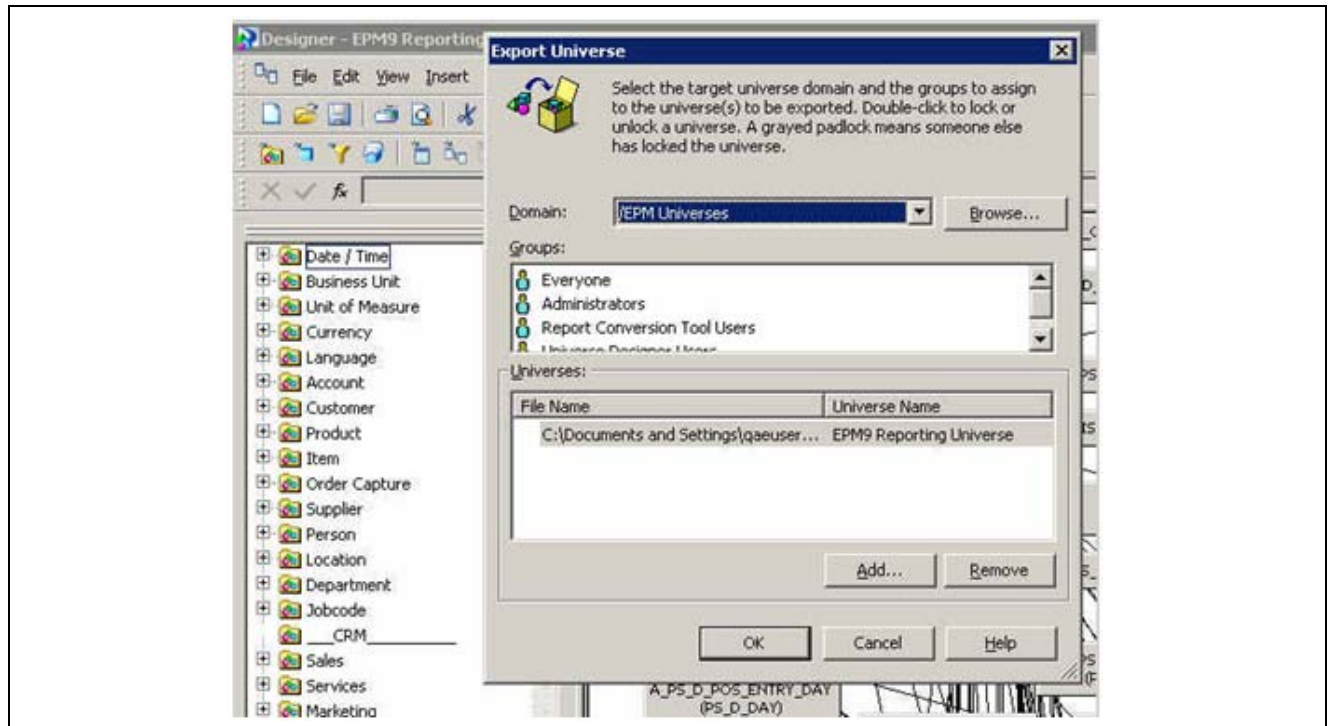




BusinessObjects Designer - EPM9 Reporting Universe - [Dev\_user - @ADAS0120.PEOPLESOFT.COM] page

1. Select File, Save, to save your universe parameters.
2. Select File, Export, to export your universe parameters.

The BusinessObjects Designer - Export Universe page appears:



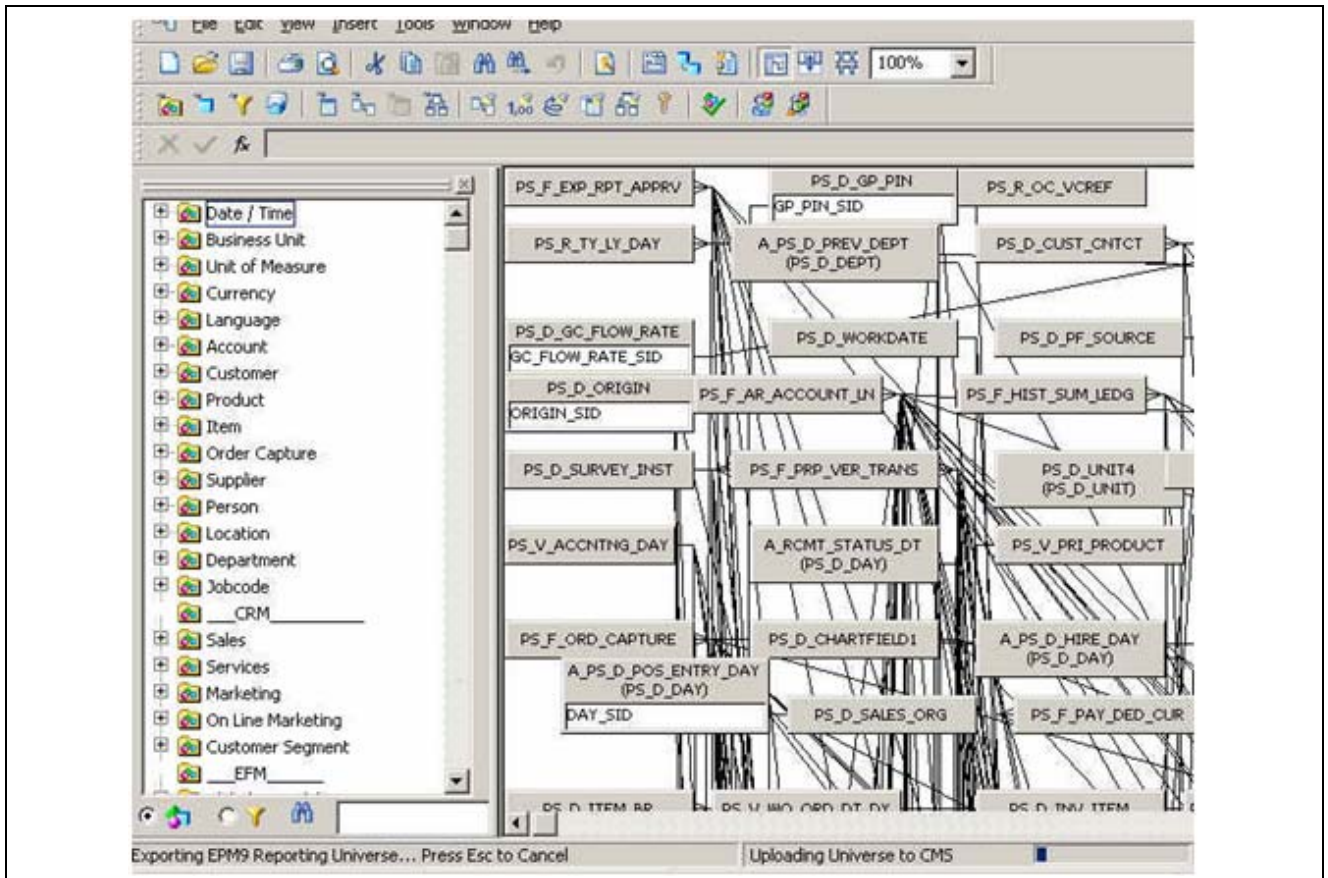
BusinessObjects Designer - Export Universe page

## Task A-2-6: Selecting the Target Universe Domain and Groups to Export

To select the target universe domain and groups to assign to the universe for export:

1. From the Domain drop-down arrow list box, select the target universe domain for export.
2. In the Groups section, use the scroll bar to scroll and select the groups to assign to the universe for export.  
You can also click the Browse button to browse for and select the target universe domain.
3. Double-click to lock or unlock a universe.  
A grayed padlock signifies that someone else had locked that universe.
4. Click the Add button to add the selected universe to your export.  
Alternatively, you can click the Remove button to remove a selected universe from your export.
5. Click the OK button.

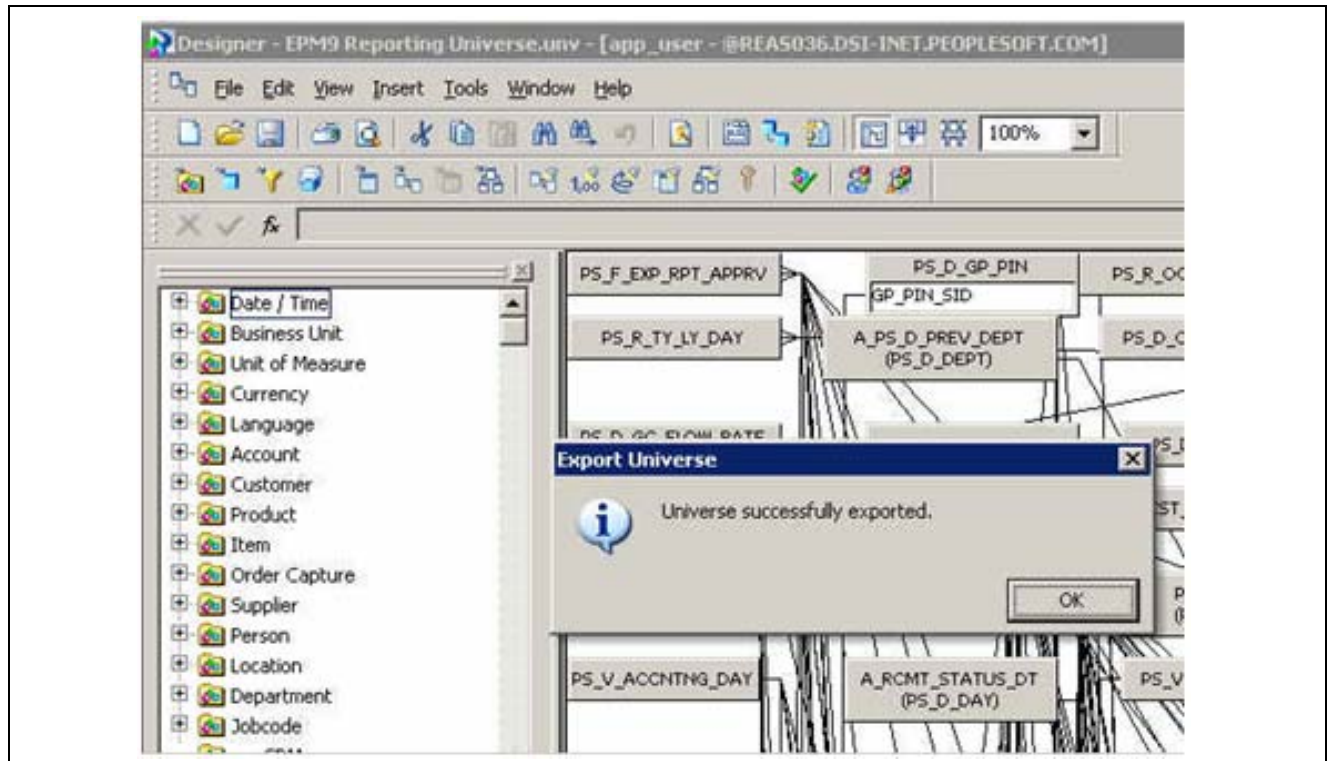
The universe uploads to the target universe domain. For example: CMS.



BusinessObjects Designer - Exporting EPM9 Reporting Universe page showing the upload status at the base of the page

**Note.** On your keyboard, press the Esc key if you want to cancel the upload.

The Export Universe - Universe successfully exported message appears:



BusinessObjects Designer - Exporting EPM9 Reporting Universe.unv page showing the universe successfully exported

6. Click the OK button.
  7. Close out of the BusinessObjects Designer application.
- The import of your universe is complete.

## Task A-3: Accessing the PeopleSoft EPM WebIntelligence Documents Using BusinessObjects InfoView

This task provides instructions to access the PeopleSoft EPM WebIntelligence documents using the BusinessObjects InfoView URL.

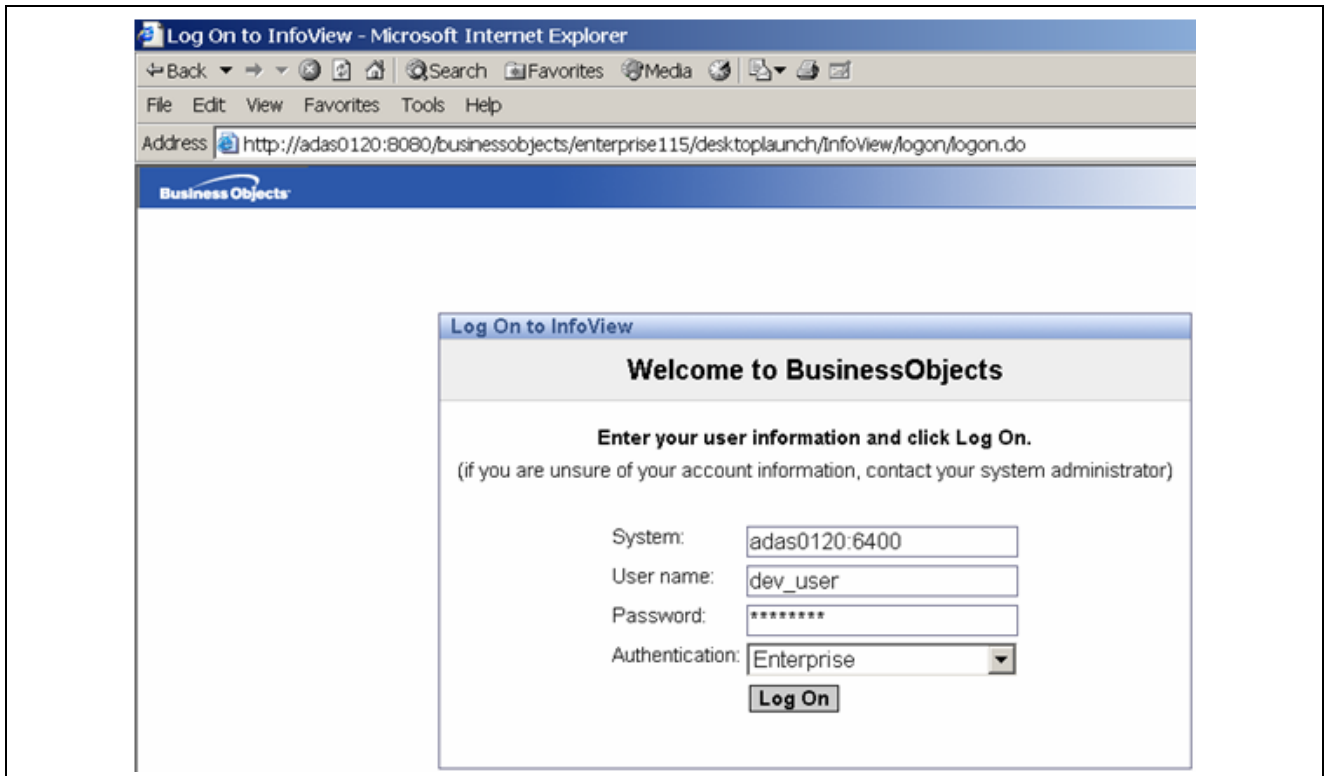
To access the PeopleSoft EPM webIntelligence documents using BusinessObjects InfoView:

1. Launch the web browser and access the URL for your BusinessObjects WebIntelligence installation.

The application URL points to the location where BusinessObjects InfoView was installed:

*<http://adas0120:8080/businessobjects/enterprise115/desktoplaunch/InfoView/logon/logon.do>*

The BusinessObjects Log On to InfoView - Welcome page appears:

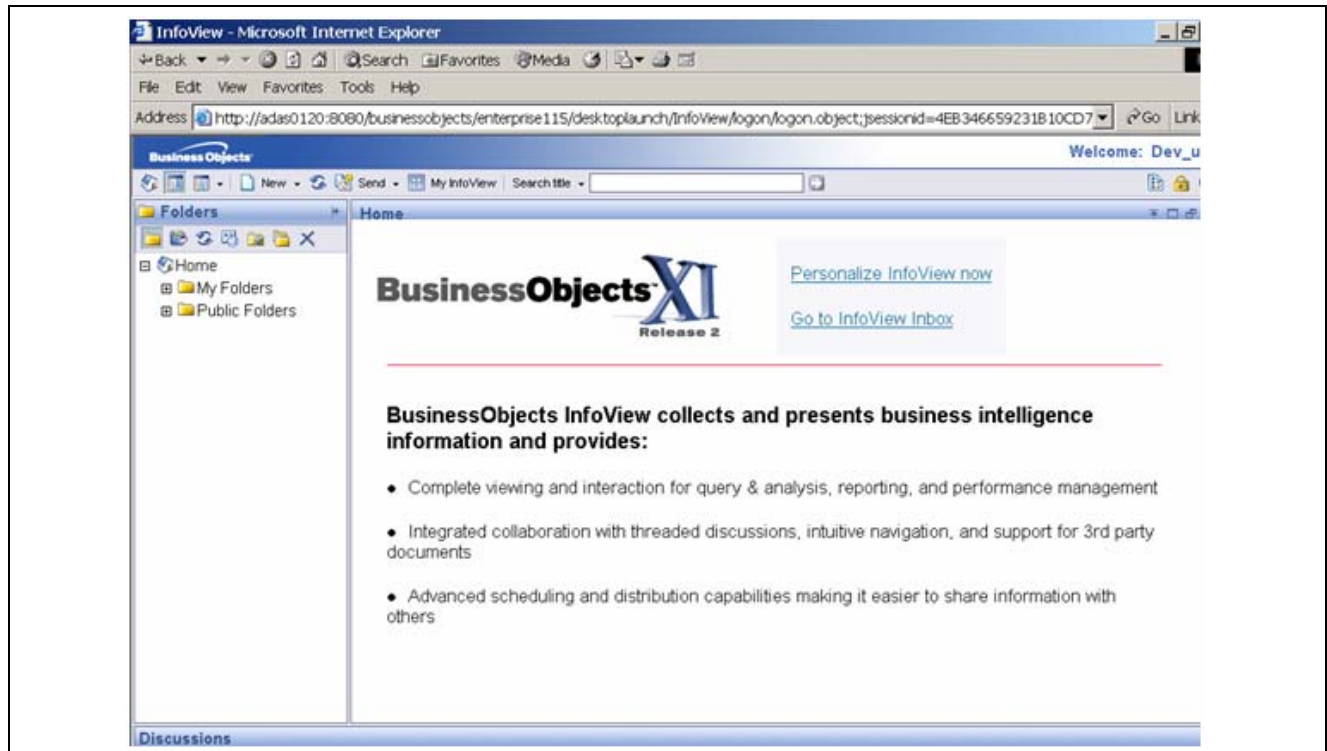


BusinessObjects Log On to InfoView - Welcome page

2. Enter the following criteria to log on to BusinessObjects InfoView:
  - a. The system server name. For example: *adas0120:6400*
  - b. The general supervisor User name and Password. For example: *dev\_user*
3. Click the Log On button.

Upon successful login, the BusinessObjects InfoView home page appears:

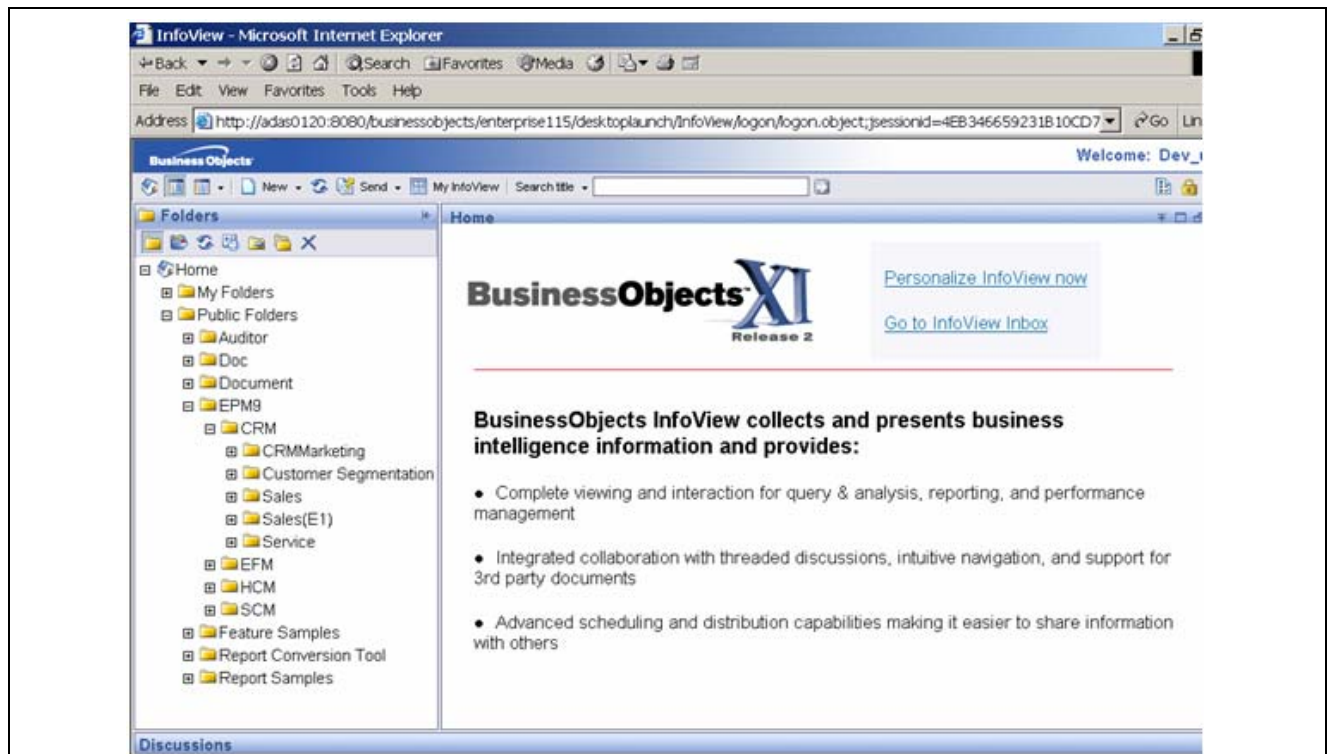




BusinessObjects InfoView - Home page

4. From the folders in the left pane, drill-down to locate the folder that you just imported.

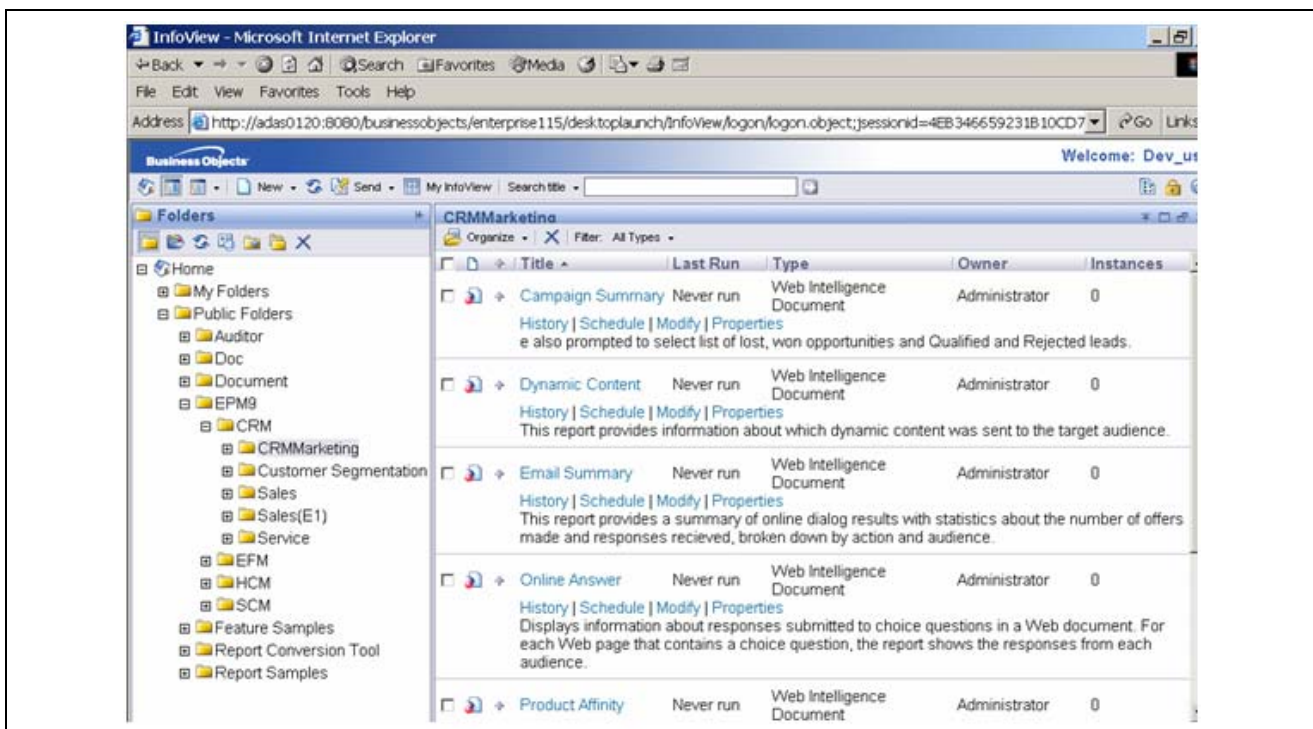
In this example, the new folder resides in Public Folders, EPM9.



BusinessObjects InfoView - Home page showing drill-down to subfolders

5. Drill-down again, and then double-click the subfolder that you want to use to create and run reports.

In this example, select EPM9, CR, CRMMarketing.



BusinessObjects InfoView - Drill-down to subfolder showing the CRMMarketing content

The BusinessObjects WebIntelligence documents display in the right pane.

---

**Note.** This example displays all of the PeopleSoft EPM warehouses. Your drill-down will display only the files for your PeopleSoft warehouse implementation.

---





## APPENDIX B

# Installing and Configuring Data Mining Tools

This appendix discusses:

- Prerequisites
- Installing com.peoplesoft.epm.cr.jar on the Web Server
- Modifying psappsrv.cfg File
- Installing Additional Component Software on the Process Scheduler Machine
- Installing the PeopleSoft EPM Adapter Library File
- Modifying Microsoft NT Process Scheduler Configuration File
- Ensuring Appropriate Permissions are Set
- Designating a Vendor Model File Directory
- Modifying Installation Options
- Ensuring the Sun Java Executable is on the Command Path

Oracle's PeopleSoft Enterprise Customer Behavior Modeling (CBM) uses certified data mining tools to create predictive models. These instructions describe how to install and configure certified data mining applications for use with PeopleSoft Customer Behavior Modeling. This installation is optional. If you do not intend to create predictive models, you do not need to complete the instructions in this appendix chapter.

---

## Prerequisites

This installation must take place after you install PeopleSoft Enterprise PeopleTools and the PeopleSoft Pure Internet Architecture.

---

**Note.** These instructions use *WEBLOGIC\_HOME* to refer to the location to which BEA WebLogic is installed on your machine. Substitute your actual BEA WebLogic location for *WEBLOGIC\_HOME*.

---

---

## Task B-1: Installing com.peoplesoft.epm.cr.jar on the Web Server

This section discusses:

- Installing on BEA WebLogic
- Installing on Oracle Application Server

- Installing on IBM WebSphere

## Task B-1-1: Installing on BEA WebLogic

To install com.peoplesoft.epm.cr.jar on a BEA WebLogic server, you must do the following:

- Copy the required files to the appropriate directories as follows:
  - Copy the com.peoplesoft.epm.cr.jar file from the following path:  
 Microsoft Windows NT: *PS\_HOME*\class  
 UNIX: *PS\_HOME*/appserv/classes
  - To the following path: *PS\_HOME*\webserver\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\lib
- Update your BEA WebLogic Deployment Descriptor File as follows:
  - Edit the BEA Weblogic Deployment Descriptor file web.xml that is located at:  
*PS\_HOME*\webserver\WebLogic\_Domain\applications\peoplesoft\PORTAL\WEB-INF\web.xml  
 For example, on Microsoft Windows NT, if your *PS\_HOME* is C:\PT848 and your BEA WebLogic Domain is named *peoplesoft*, your web.xml is located as follows:  
 C:\pt848\webserver\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\web.xml
  - After the last occurrence of </servlet> on the file, add the following:
 

```
<servlet>
<servlet-name>ScoreServer</servlet-name>
<servlet-class>com.peoplesoft.epm.cr.ScoreServer</servlet-class>
<init-param>
<param-name>config</param-name>
<param-value>C:\PT848\webserver\peoplesoft\applications\peoplesoft\PORTAL⇒
\model_deployer.cfg</param-value>
</init-param>
<load-on-startup>-1</load-on-startup>
</servlet>
```
  - After the last occurrence of </servlet-mapping>, add the following:
 

```
<servlet-mapping>
<servlet-name>ScoreServer</servlet-name>
<url-pattern>/servlets/ScoreServer</url-pattern>
</servlet-mapping>
```
- Save the web.xml file and restart the BEA web server.

## Task B-1-2: Installing on Oracle Application Server

To install com.peoplesoft.epm.cr.jar on an Oracle Application Server (OAS), you must do the following:

- Determine where the deployment files are located.  
 It should be a path that leads to or includes \PORTAL\WEB-INF.  
 For the purpose of this document, Oracle refers to the deployment path as the path leading to the \PORTAL\WEB-INF and referred to here as *DEPLOYMENT*.

2. Copy the required files to the appropriate directories as follows:
  - a. Copy the com.peoplesoft.epm.cr.jar file from:
    - Microsoft Windows NT: *PS\_HOME*\class
    - UNIX: *PS\_HOME*/appserv/classes
  - b. Copy the com.peoplesoft.epm.cr.jar file to: *DEPLOYMENT*\PORTAL\WEB-INF\lib
3. Update your OAS Deployment Descriptor File as follows:
  - a. Edit the OAS Deployment Descriptor file *web.xml* that is located at:
    - DEPLOYMENT*\PORTAL\WEB-INF\web.xml

For example, on Microsoft Windows NT, if your *DEPLOYMENT* is C:\pt848\oas1012\j2ee\peoplesoft\applications\peoplesoft\, your web.xml is located as follows:

C:\pt848\oas1012\j2ee\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\web.xml
  - b. After the last occurrence of </servlet> on the file, add the following:
 

```
<servlet>
<servlet-name>ScoreServer</servlet-name>
<servlet-class>com.peoplesoft.epm.cr.ScoreServer</servlet-class>
<init-param>
<param-name>config</param-name>
<param-value>C:\pt848\oas1012\j2ee\peoplesoft\applications\peoplesoft\PORTAL⇒
\model_deployer.cfg</param-value>
</init-param>
<load-on-startup>-1</load-on-startup>
</servlet>

</servlet-mapping>
```
  - c. After the last occurrence of </servlet-mapping>, add the following:
 

```
<servlet-mapping>
<servlet-name>ScoreServer</servlet-name>
<url-pattern>/servlets/ScoreServer</url-pattern>
```
4. Save the web.xml file and restart the OAS web server.

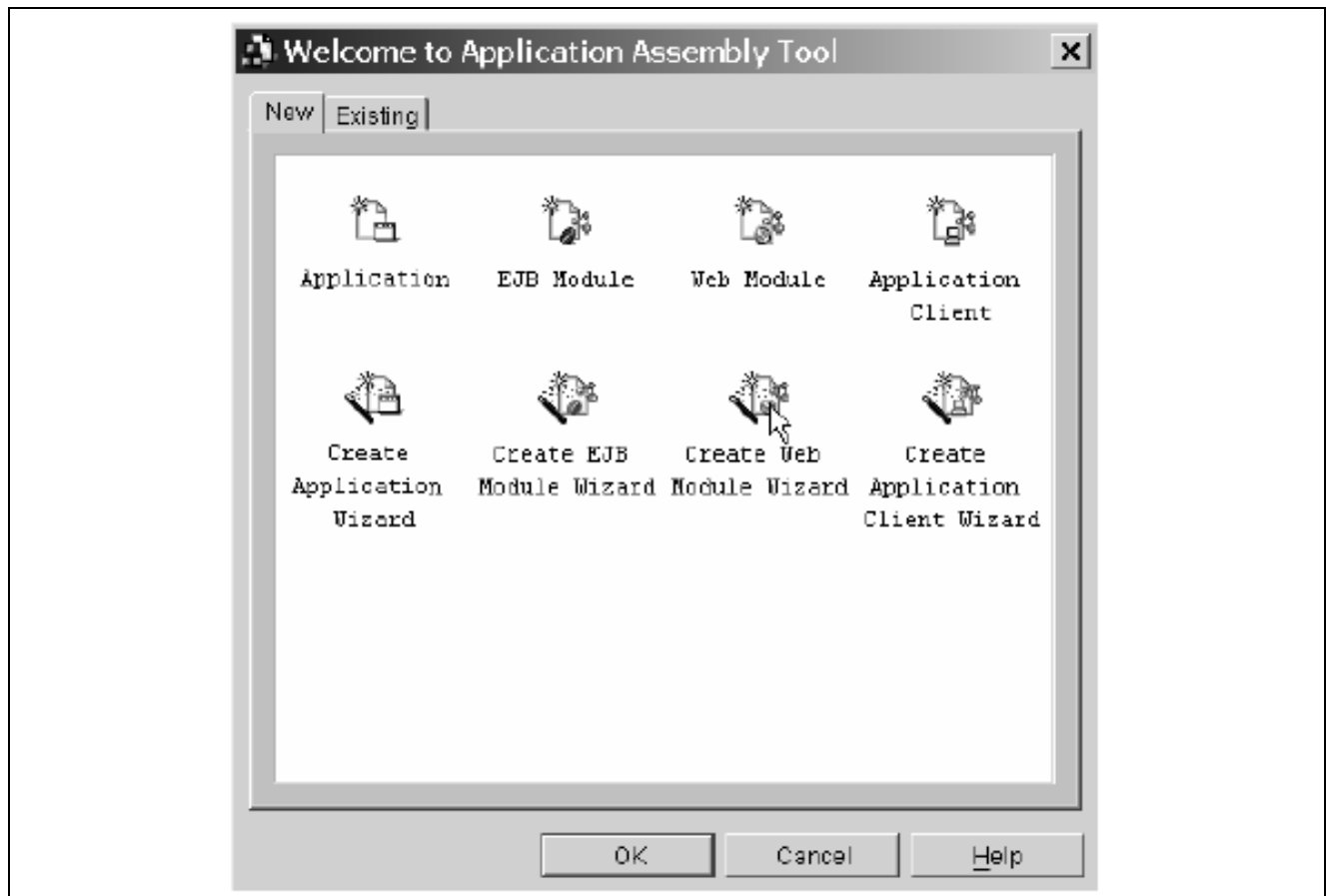
## Task B-1-3: Installing on IBM WebSphere

To install com.peoplesoft.epm.cr.jar on an IBM WebSphere server, you must do the following:

1. Select the IBM WebSphere program directory and launch the assembly tool.
 

The assembly tool is located at: C:\Apps\WebShere\AppServer\bin>assembly

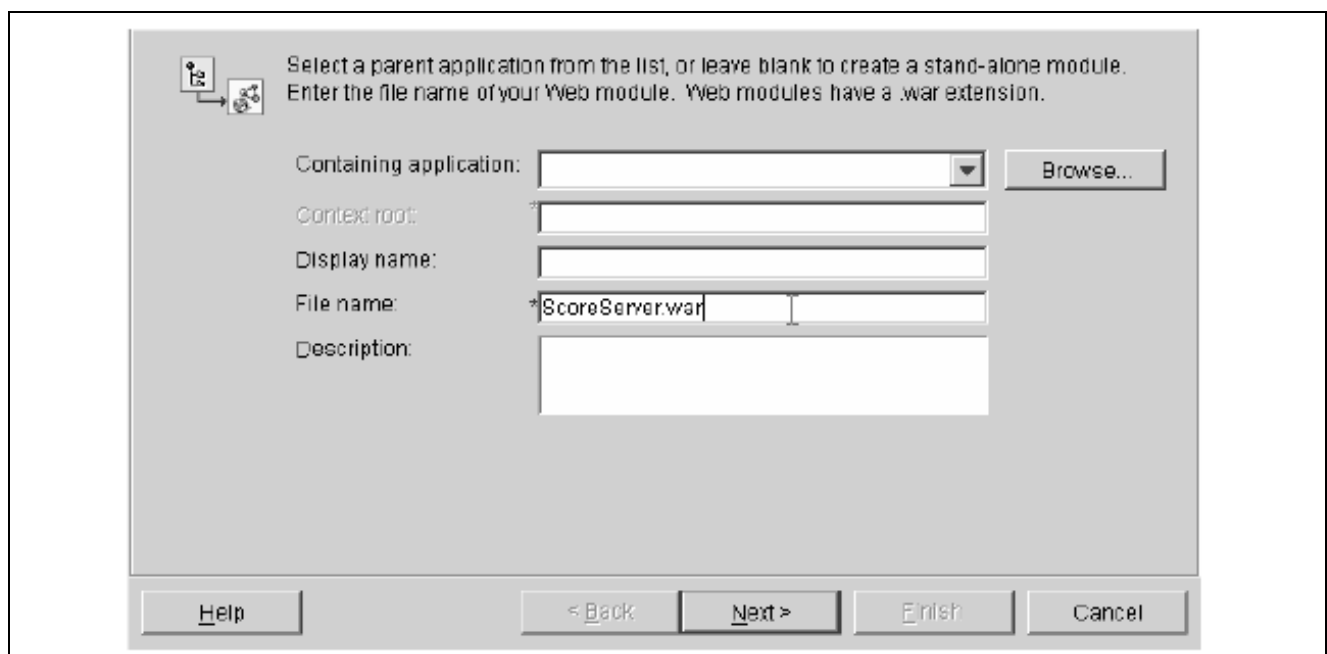
The Welcome to Application Assembly Tool options page appears.



IBM WebSphere - Welcome to Application Assembly Tool options page

2. On the New tab, click the Create Web Module Wizard option, and then click OK.

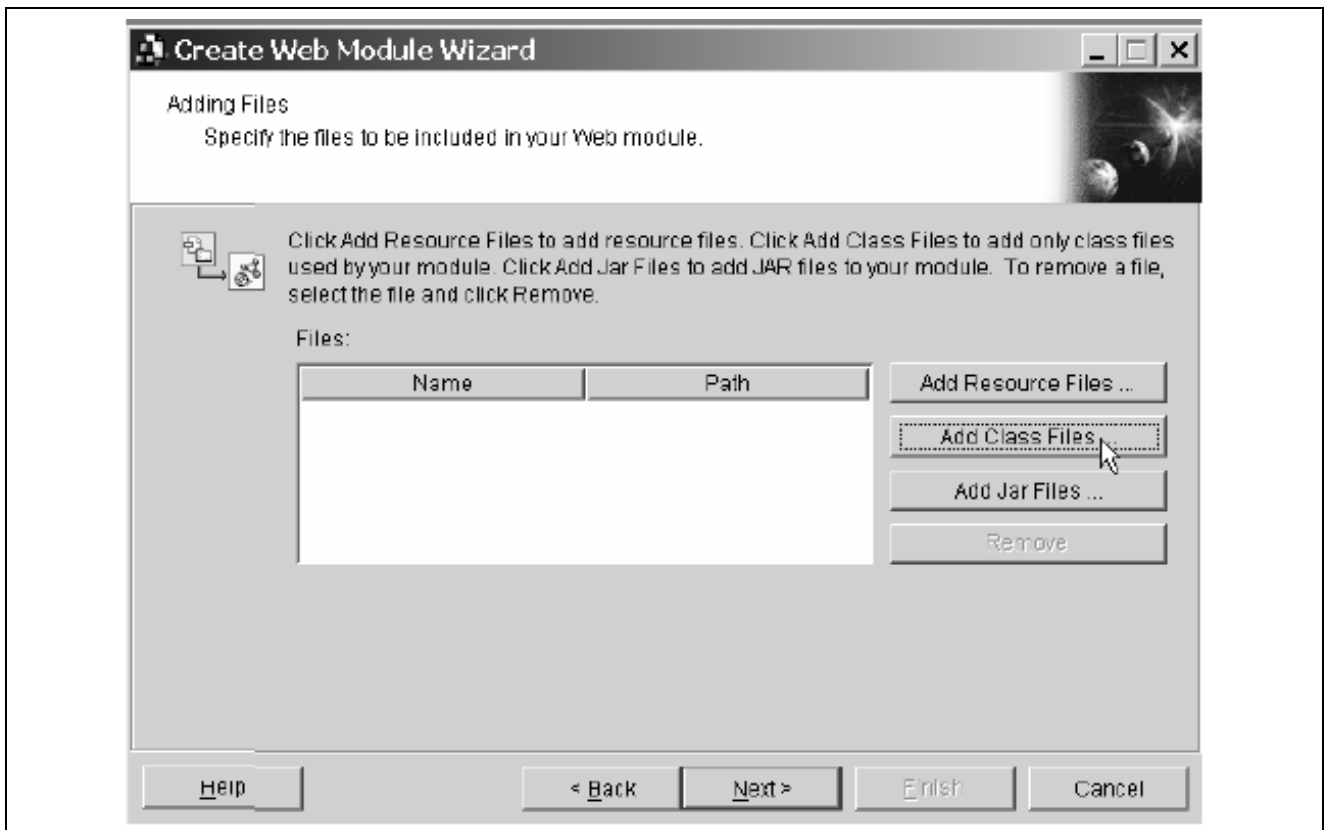
The page with options to select a parent application or leave blank to create a stand-alone module appears.



Select a parent application or leave blank to create a stand-alone module options page

3. In the File Name field, enter a file name for the new web module.  
Click Next.

The Create Web Module Wizard page appears.



Create Web Module Wizard - Add Files page

4. Click the Add Class Files button to add the jar file *com.peoplesoft.epm.cr.jar* to the web module.

---

**Note.** If the Add Jar Files button does not work, Oracle recommends that you instead add the jar file using the Add Class Files option.

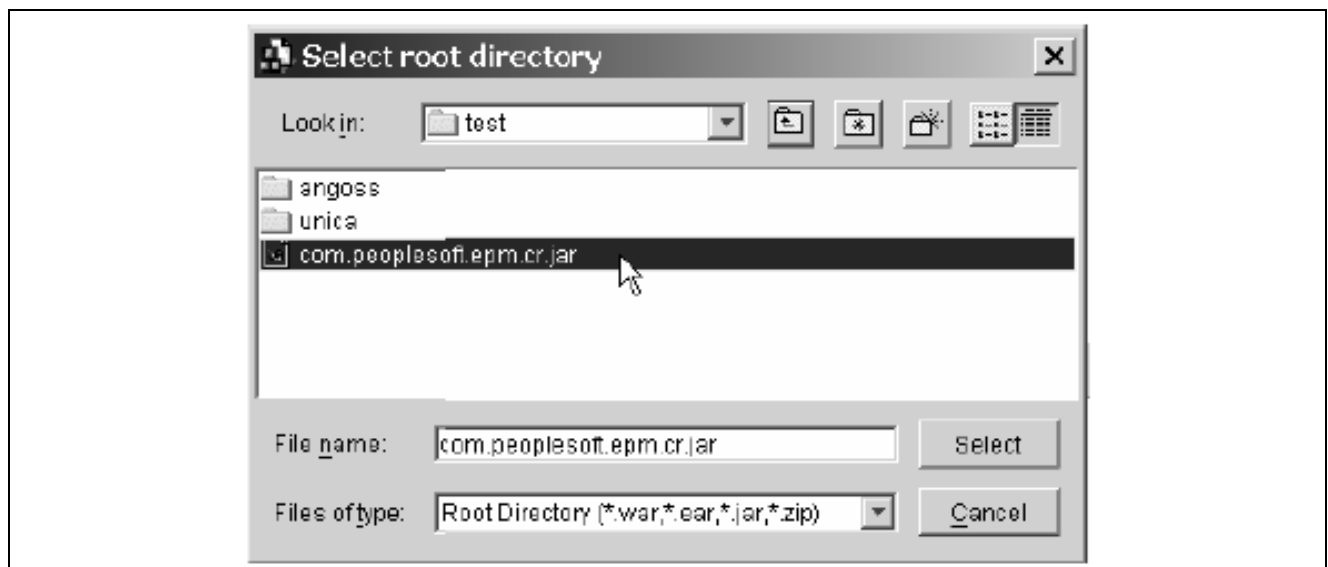
The Add Files page with a Browse button appears.

---



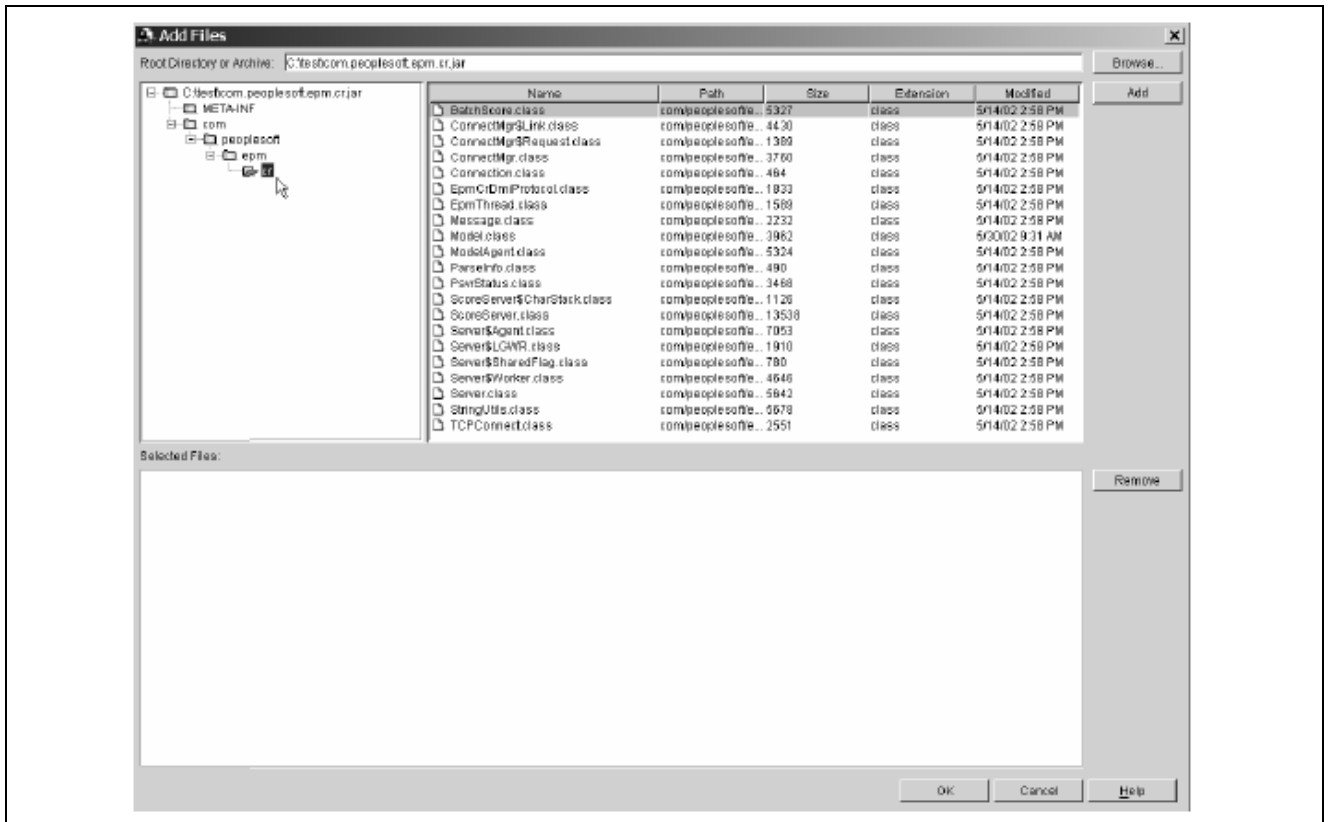
Add Files page to browse for root directory or archive

5. On the Add Files page, click the Browse button to locate the jar file *com.peoplesoft.epm.cr.jar*. The Select Root Directory page appears.



Select Root Directory page with file name *com.peoplesoft.epm.cr.jar* selected

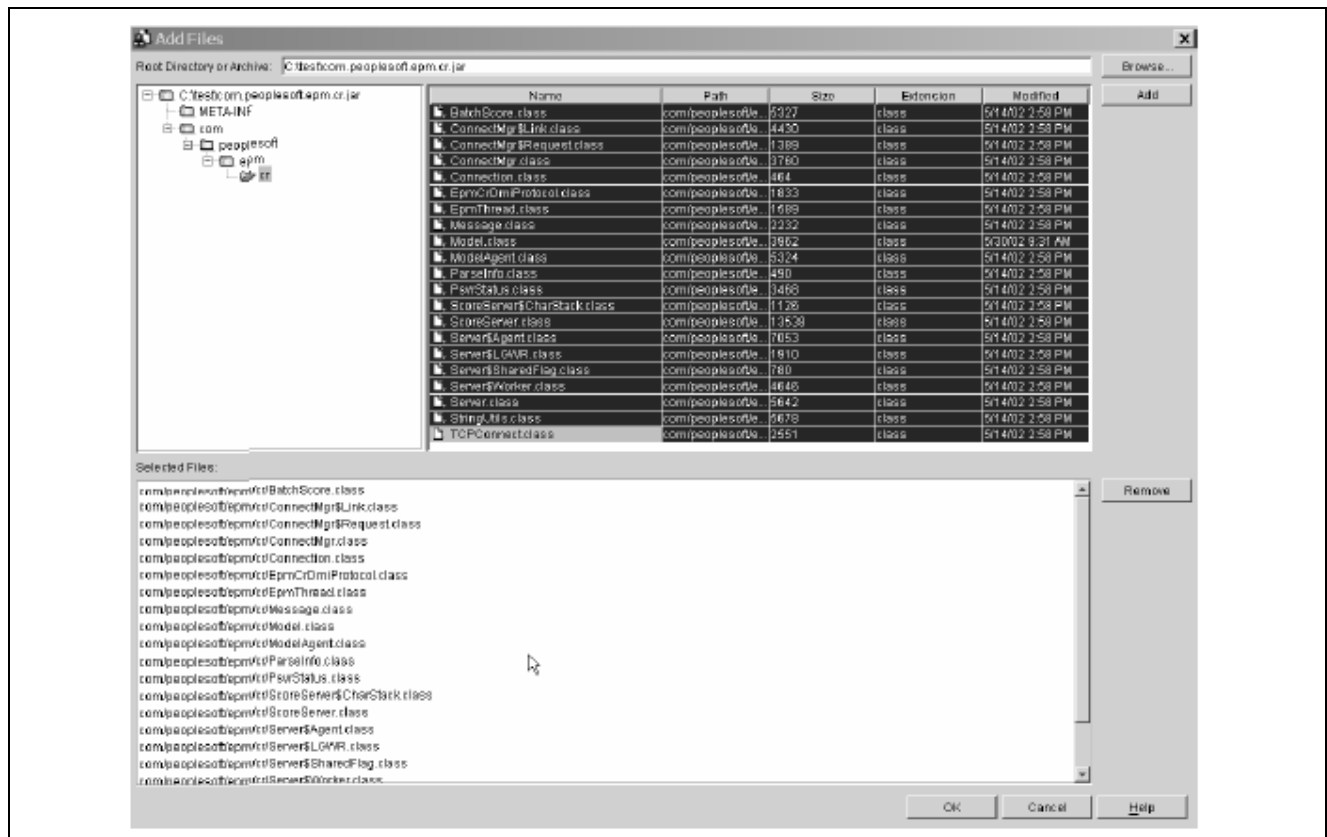
6. On the *com.peoplesoft.epm.cr.jar* folder, drill down until it is fully expanded. Locate the \*.class files. The fully expanded file revealing all of the class files within it displays in the Add Files upper pane.



Add Files upper pane showing all of the \*.class files

7. Select all of the \*.class files.

You can select all of the class files by clicking the first or top class file, then pressing Shift on your keyboard, and then clicking the last or bottom class file.

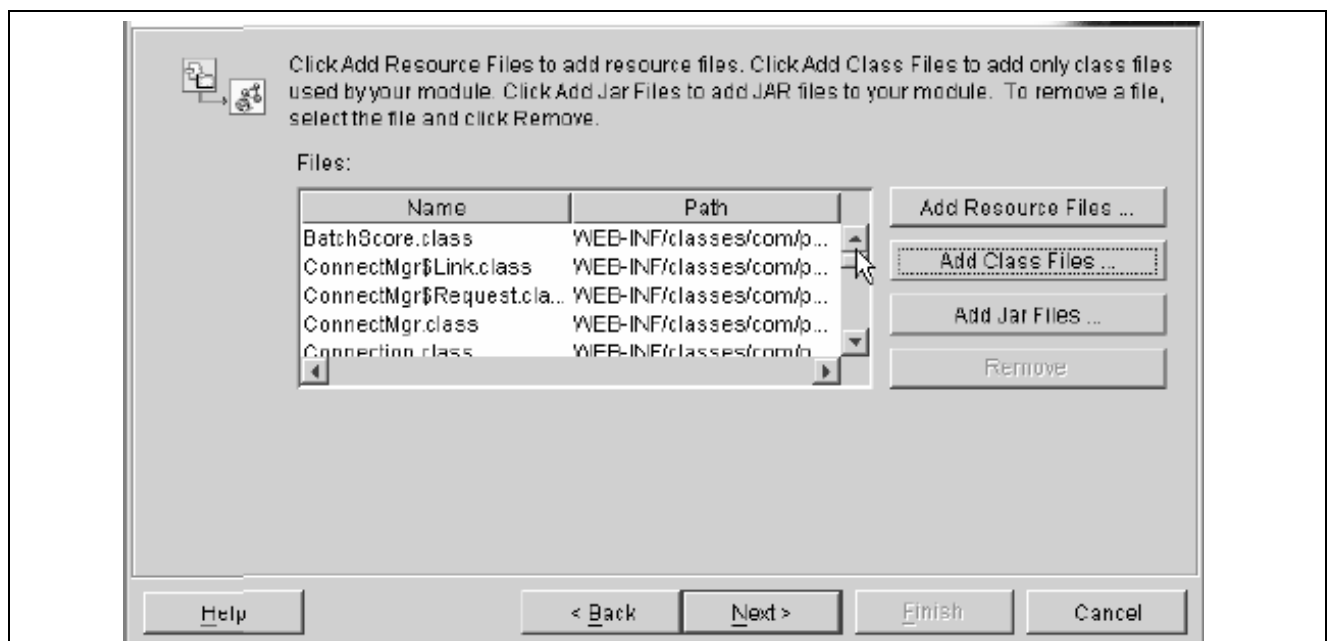


Add Files page showing all selected files in the lower pane

The files that you select appear in the Selected Files section in the lower pane of the Add Files page.

8. If the lower pane includes all of the \*.class files, click OK.

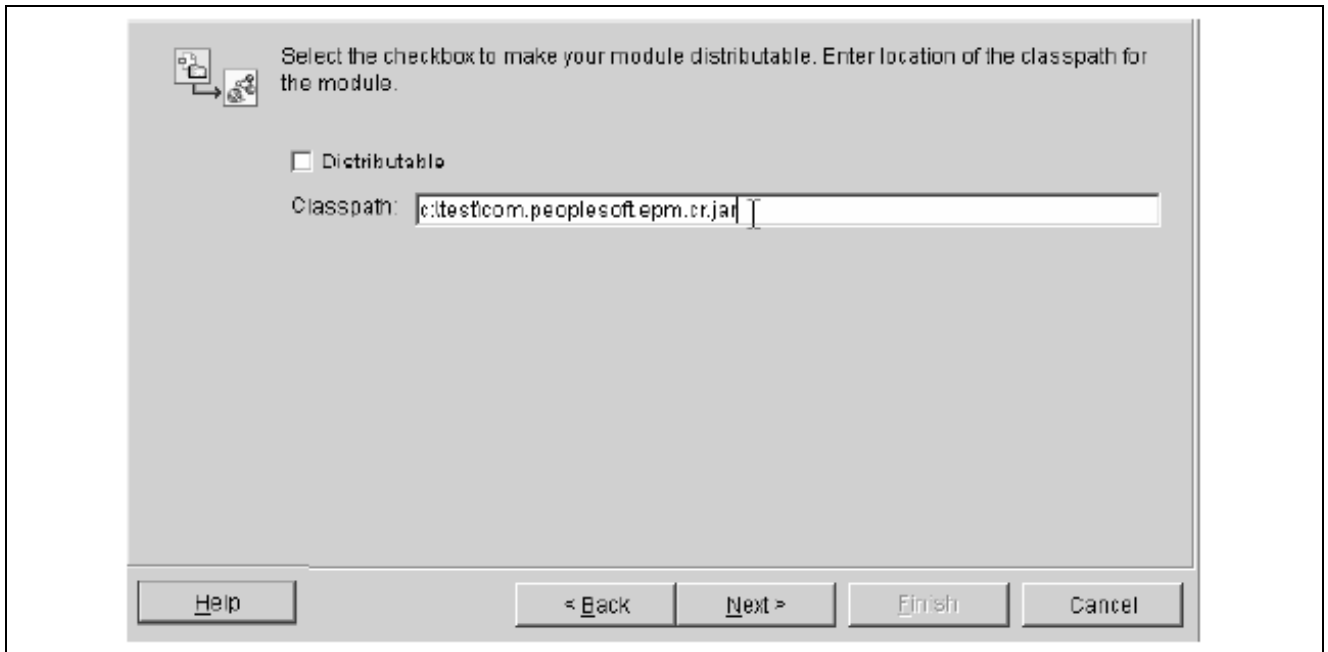
The Wizard page appears with the \*.class files listed in the Files grid.



Wizard page showing the selected class files in the Files grid

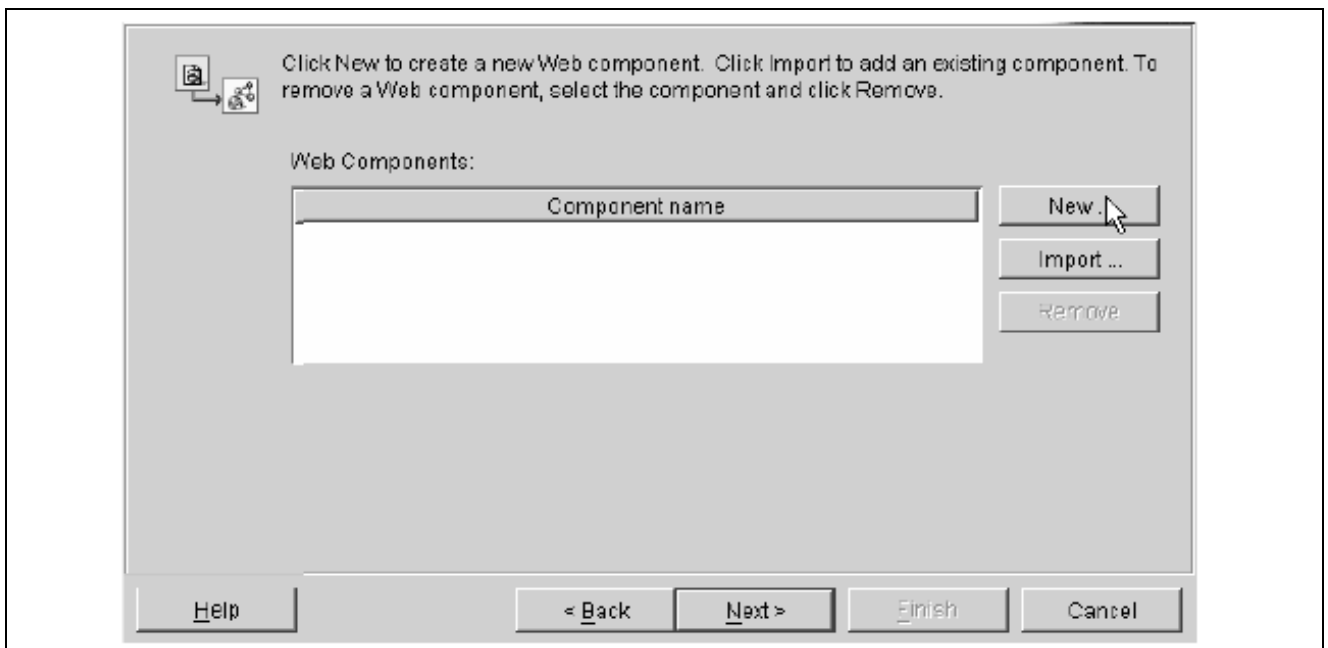


9. The \*.class files appear in the Files grid. Click Next.  
The Distributable Classpath options page appears.



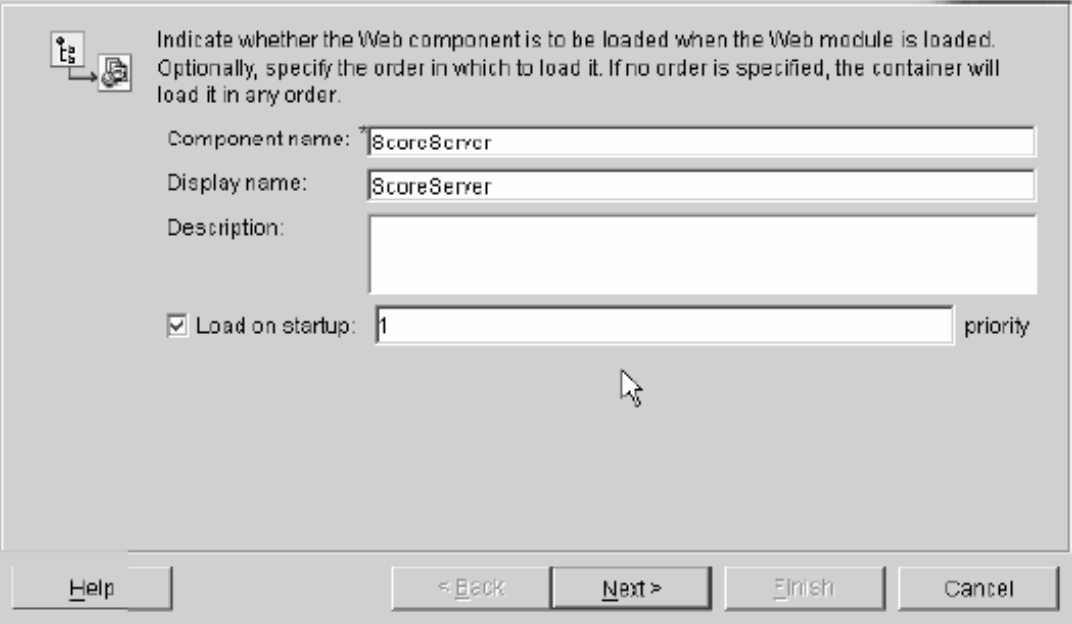
Distributable Classpath options page

10. In the Classpath field, enter the location of the jar file.  
Click Next, and then click Next again.  
The Web Components option page appears.



Web Components option page

11. Click New to add a web component.  
The Web Component Properties option page appears.



Indicate whether the Web component is to be loaded when the Web module is loaded. Optionally, specify the order in which to load it. If no order is specified, the container will load it in any order.

Component name:

Display name:

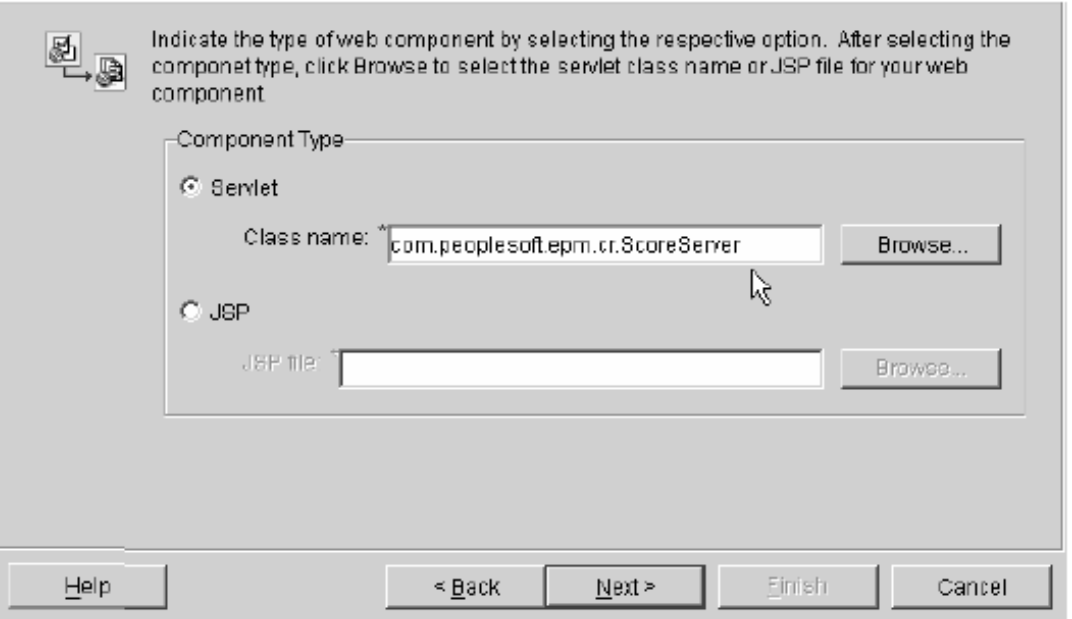
Description:

☒ Load on startup:  priority

Web Component Properties option page

12. Enter the component properties, and then click Next.

The Web Component Type option page appears.



Indicate the type of web component by selecting the respective option. After selecting the component type, click Browse to select the servlet class name or JSP file for your web component

Component Type

☒ Servlet

Class name:

☐ JSP

JSP file:

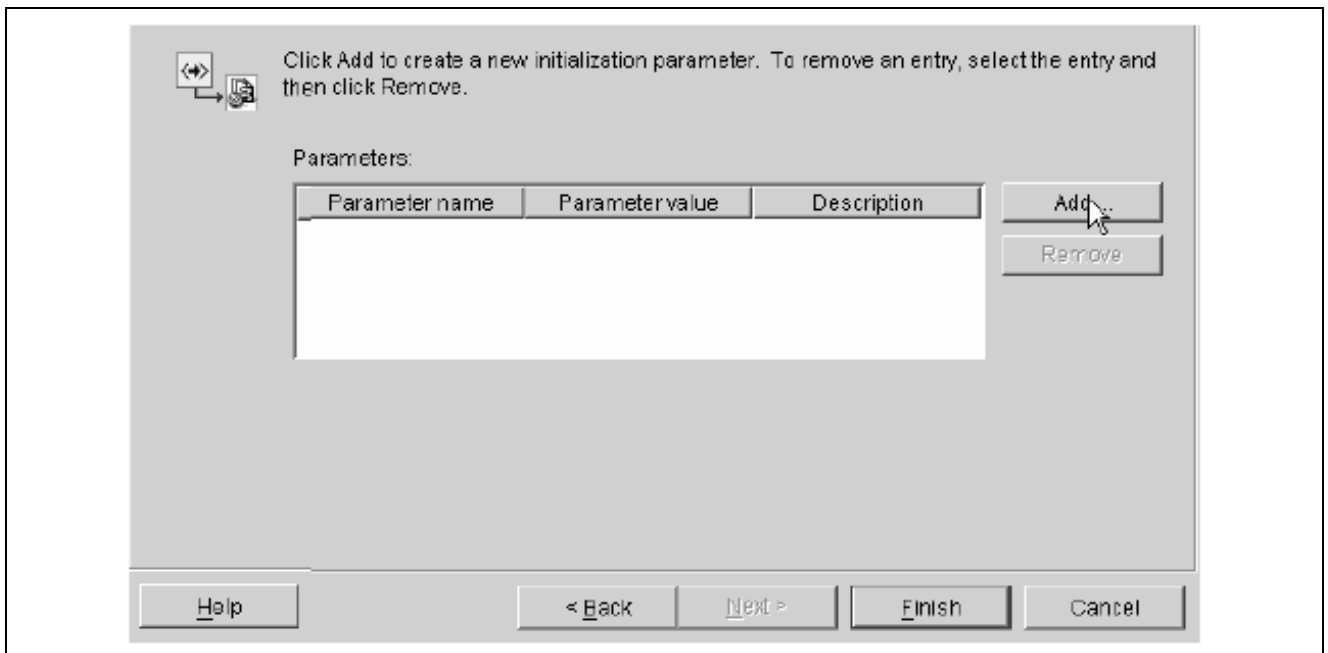
Web Component Type, Servlet and Class Name option page

13. Do the following:

- In the Component Type section, select the Servlet option.
- In the Class name field, enter the servlet class *com.peoplesoft.epm.cr.ScoreServe..*

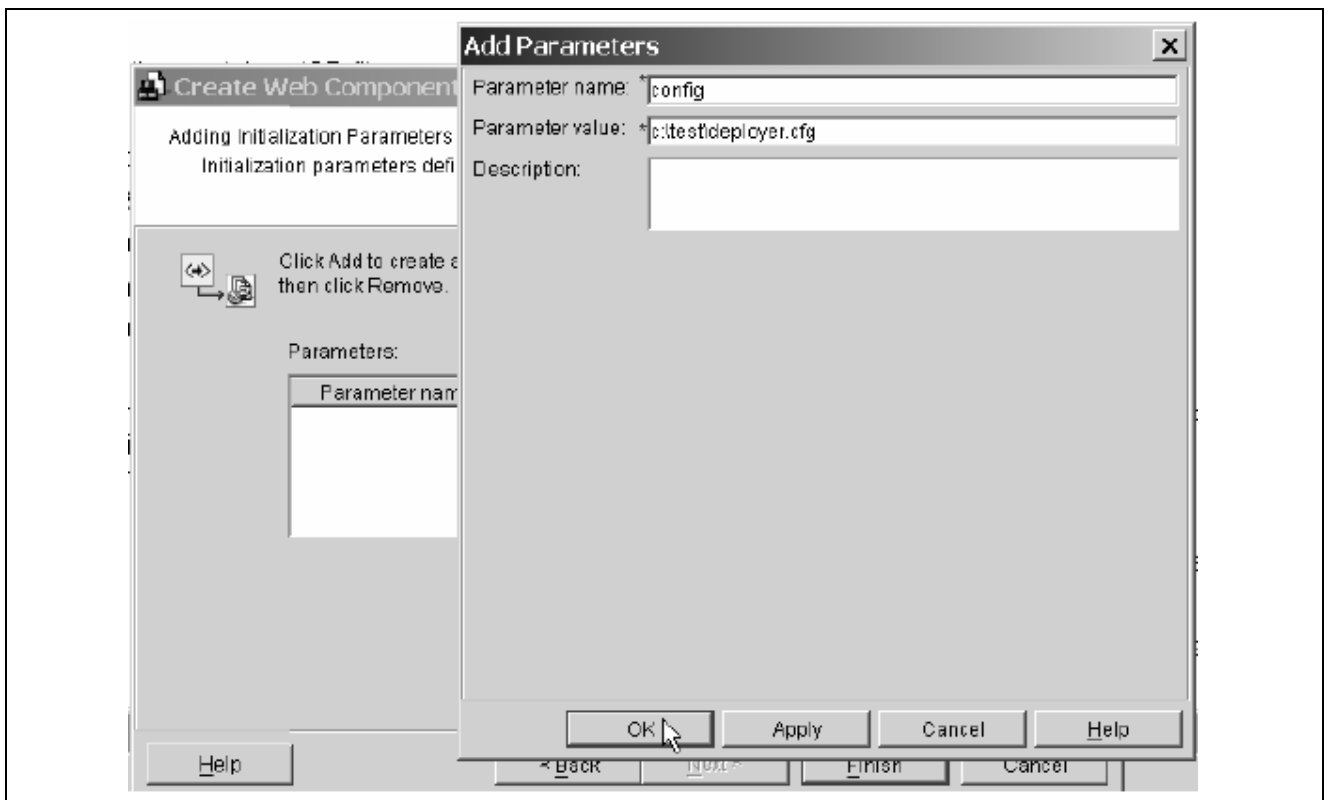
14. Click Next, and then click Next again. Click Next a third time.

The Add/Remove Parameters option page appears.



Add/RemoveParameters page

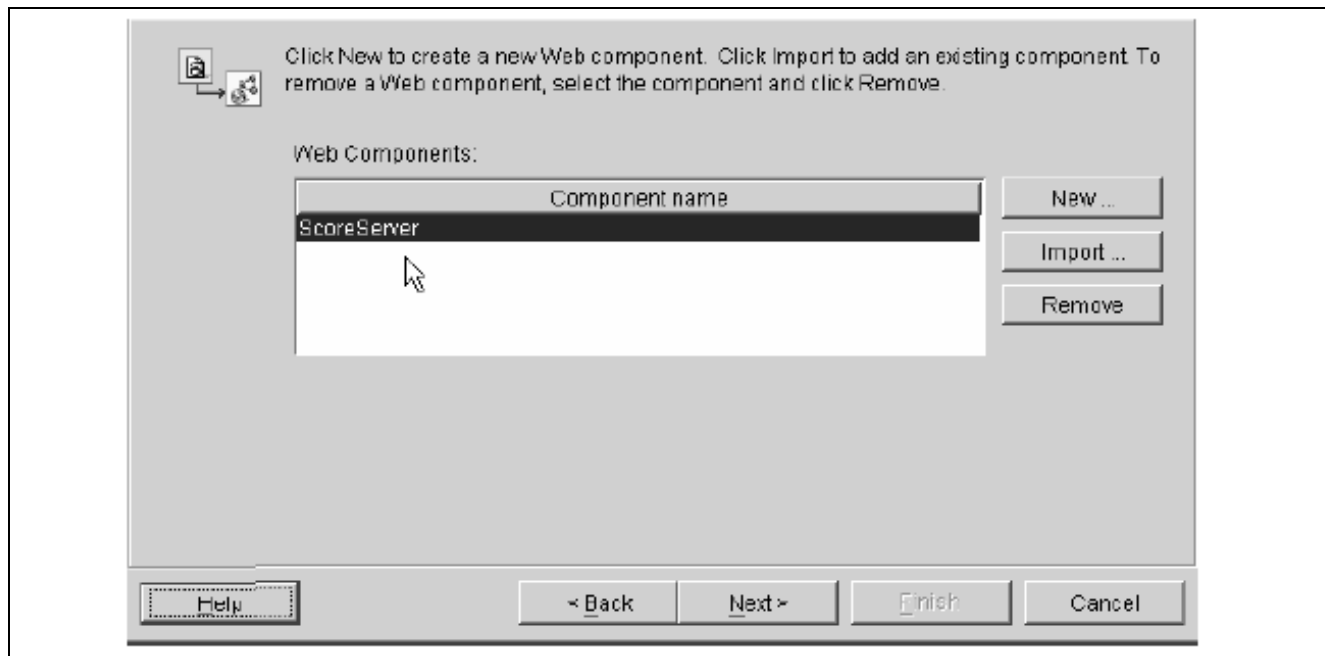
- Click Add to create the initialization parameter that tells the servlet where to find the configuration file. The Add Parameters option page appears.



Add Parameters dialog box

On the Add Parameters dialog box, enter the Parameter name and Parameter value, and then click OK. Click Finish.

The Web Components option page appears and displays the web component that you specified.



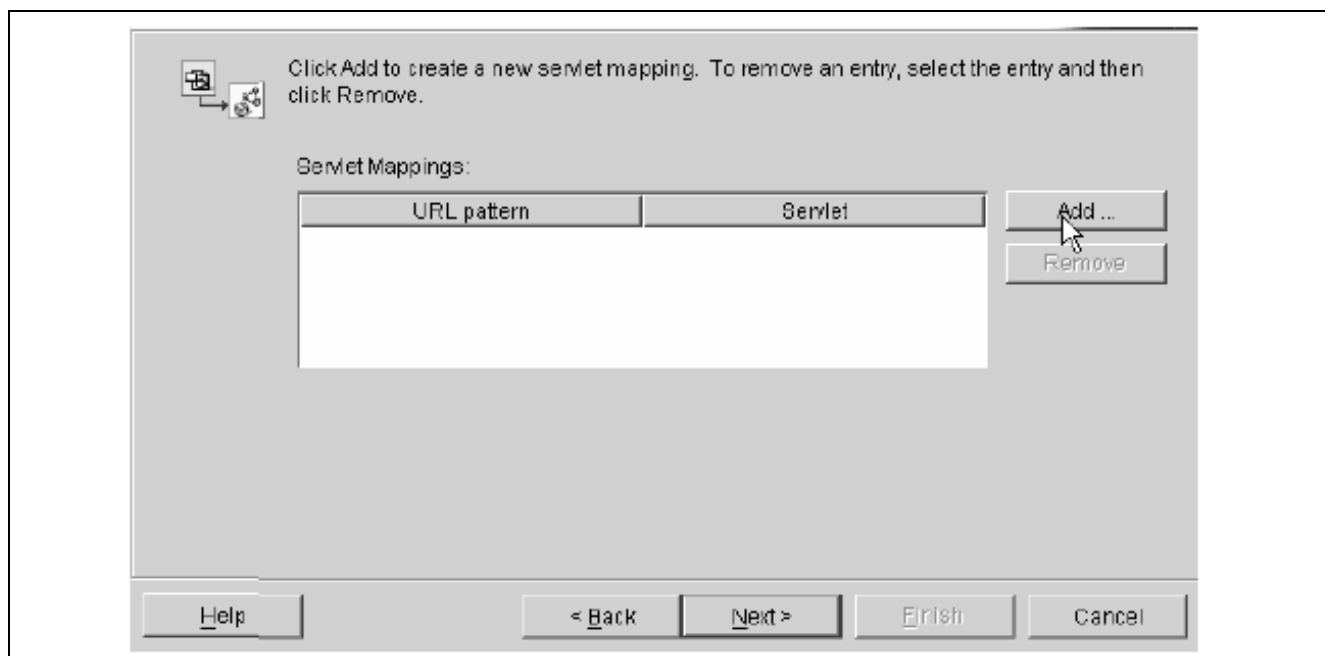
Web Components page showing ScoreServer under Component name

The Wizard page reappears.

16. On the Wizard page, view the Web Components.

Click Next twice.

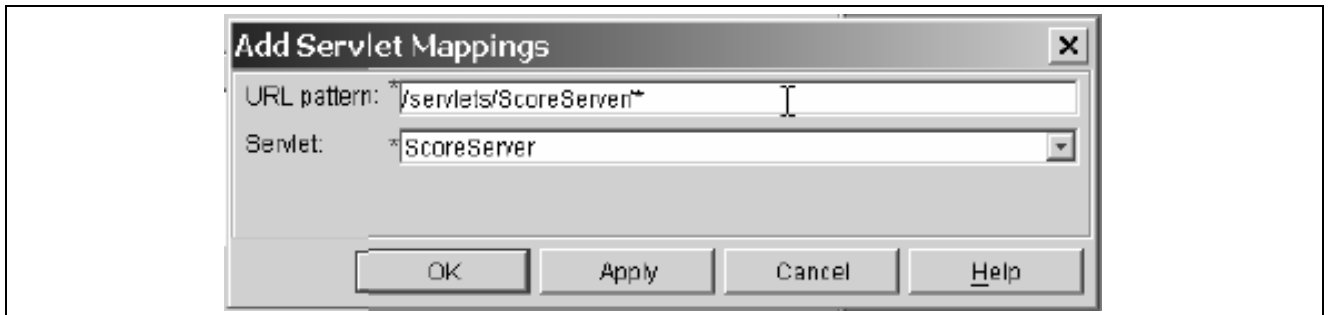
The Add/Remove Servlet Mapping options page appears.



Add/Remove Servlet Mapping options page

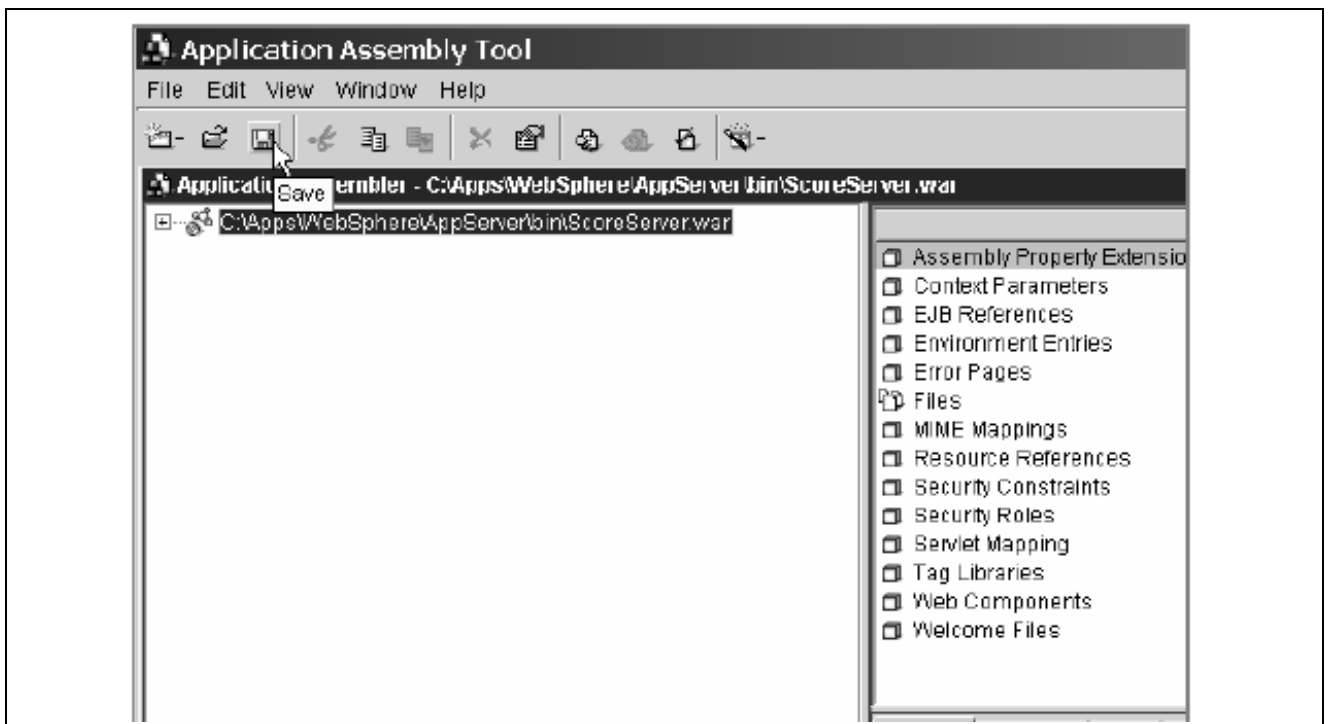
17. Click Add to add the servlet mapping.

The Add Servlet Mappings dialog box appears.



Add Servlet Mappings dialog box

18. In the Add Servlet Mappings dialog box, enter the URL pattern and Servlet.
19. Click OK and then click Finish.
20. When you return to your Application Assembly Tool page, save the assembly as follows:



Applications Assembly Tool showing the Assembly Property Extension

- a. On the Application Assembly Tool, select the assembly and click the Save button on the Applications Assembly Tool menu bar.  
The Save dialog box appears.



Applications Assembly Tool - Save dialog box

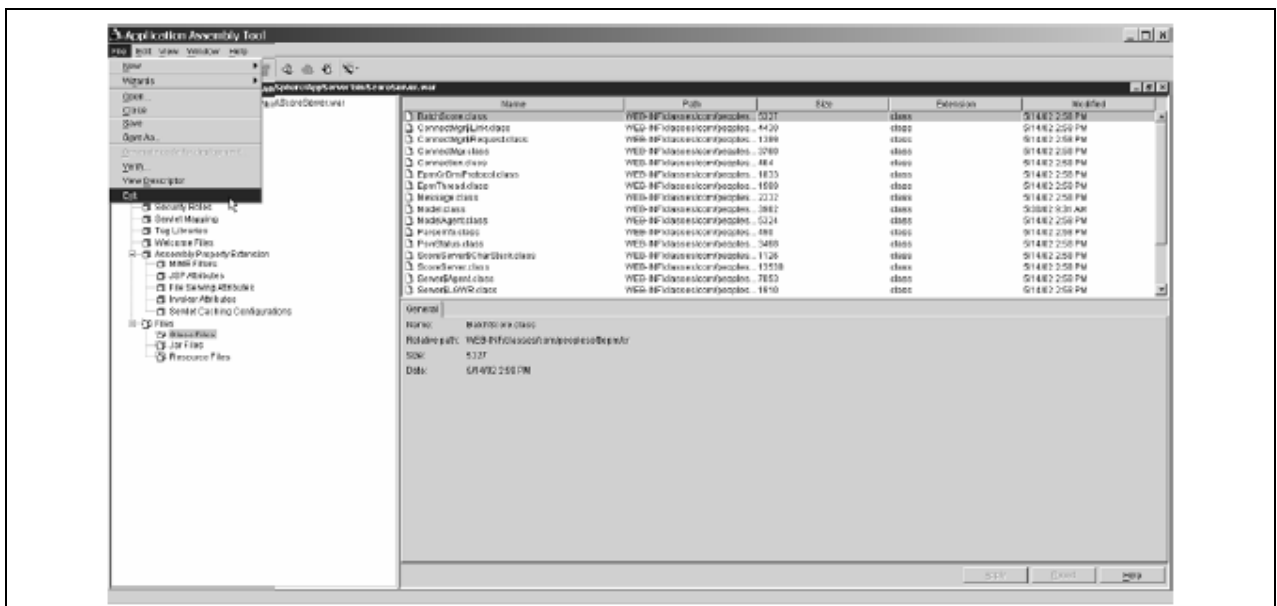
- b. On the Save dialog box, click the Save button.

The Application Assembly Tool message stating that the “Archive was saved successfully” appears.



Application Assembly Tool - Archive was saved successfully message

- c. On the Application Assembly Tool message box, click OK.



Application Assembly Tool File menu showing Exit selected

21. From the Application Assembly Tool menu, select File, Exit to exit the Application Assembly Tool.
22. From the command prompt, start the web server by entering the following command:

```
C:\Apps\WebSphere\AppServer\bin> startserver
```

23. Load a Web browser and access the administrative console at: <http://localhost:9090/admin>

This page may delay in loading if the server is still in start up mode.



IBM WebSphere Application Server - Login page

On the IBM WebSphere Server Login page, click the Submit button.

The IBM WebSphere Application Server - IBM WebSphere Administrative Domain page and structure appears.

24. Open the local node.

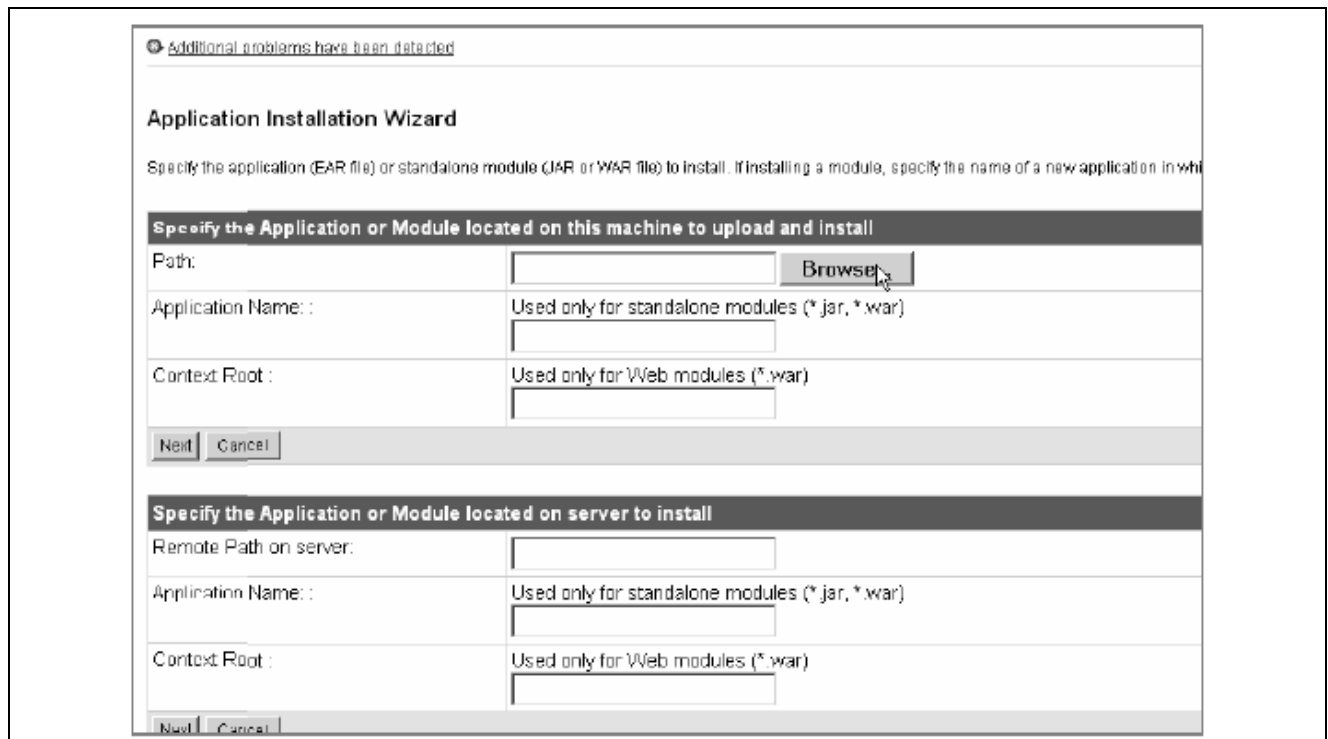


IBM WebSphere Administrative Domain structure showing the Nodes folder that contains the local host and Enterprise Applications folder

The local node will be the machine name, or *localhost*.

25. Select the folder beneath the local node that is named Enterprise Applications.
26. Click the Install button that appears on the right.

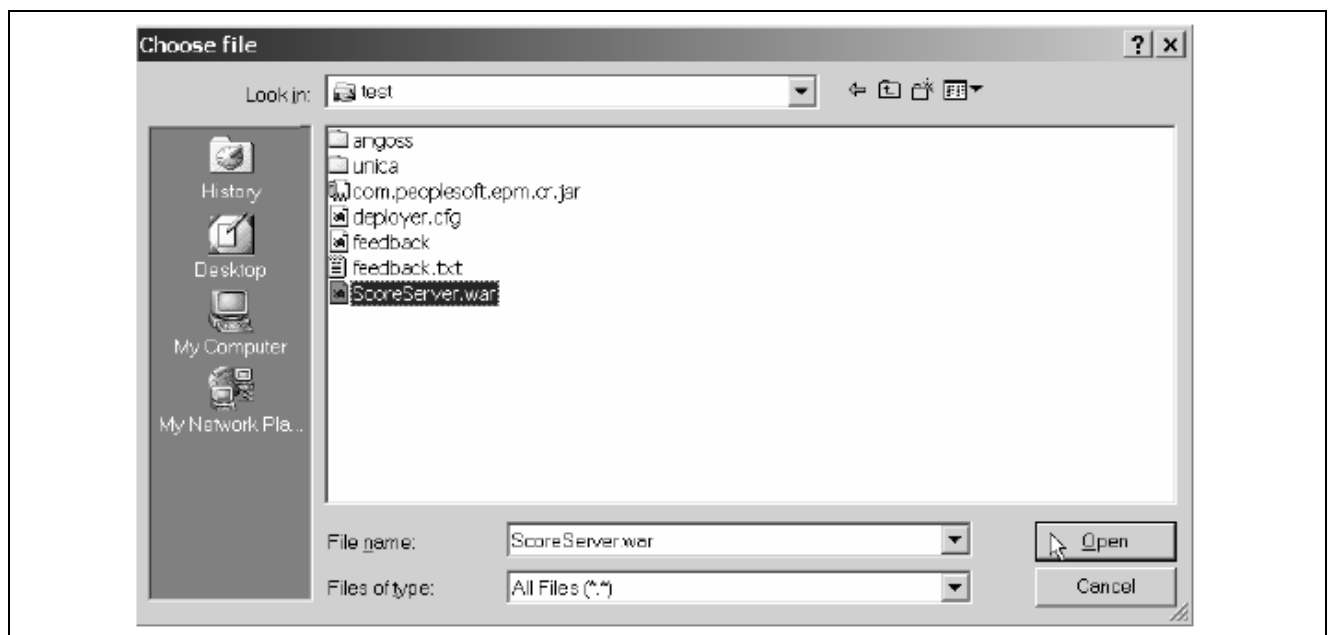
The Application Installation Wizard page appears.



Application Installation Wizard and browse option to locate and specify the application or module

27. On the Application Installation Wizard page, click Browse to locate the \*.war file that you saved.

The Choose file dialog box appears.



Choose File dialog box showing the ScoreServer.war file selected



Click Open.

The Application Installation Wizard asking you to specify the application or module to install page appears.

**Application Installation Wizard**

Specify the application (EAR file) or standalone module (JAR or WAR file) to install. If installing a module, specify the application name and context root.

**Specify the Application or Module located on this machine to upload and install**

Path:

Application Name:  Used only for standalone modules (\*.jar, \*.war)

Context Root:  Used only for Web modules (\*.war)

The Application Installation Wizard - Specify the application or module to install options page

28. Enter the Application Name and Context Root that is the servlet URL, omitting the last element (leave off the last element).

Click Next.

The Application Installation Wizard asking you to specify the virtual host page appears.

**Application Installation Wizard**

Each Web module in your application must be mapped to a virtual host and may have JSPs precompiled. For each Web module below, enter a virtual host name and select precompiled JSP option.

**Specifying Virtual Host names and Precompiled JSP option for Web Modules**

Web Module Name	Virtual Host Name	Precompile JSPs
CBM.ear: ScoreServer.war	default_host	No

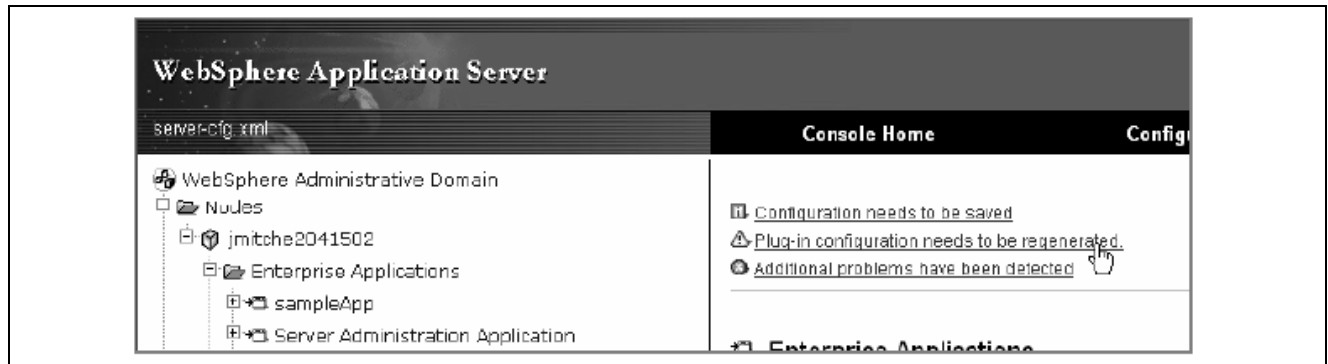
Application Installation Wizard - Specify Virtual Host options page

29. On the Application Installation Wizard's Specify Virtual Host options page, do the following:

- a. Ensure that in the Virtual Host Name field you have selected *default\_host*.
- b. Ensure that the Precompile JSPs option is set to *No*.

30. Click Next, then click Finish.

You are returned to the IBM WebSphere Application Server and IBM WebSphere Administration Domain structure.



IBM WebSphere Application Server - IBM WebSphere Administration Domain structure

31. In the right pane, click the Plug-in configuration needs to be regenerated link.

32. Click the Generate button.

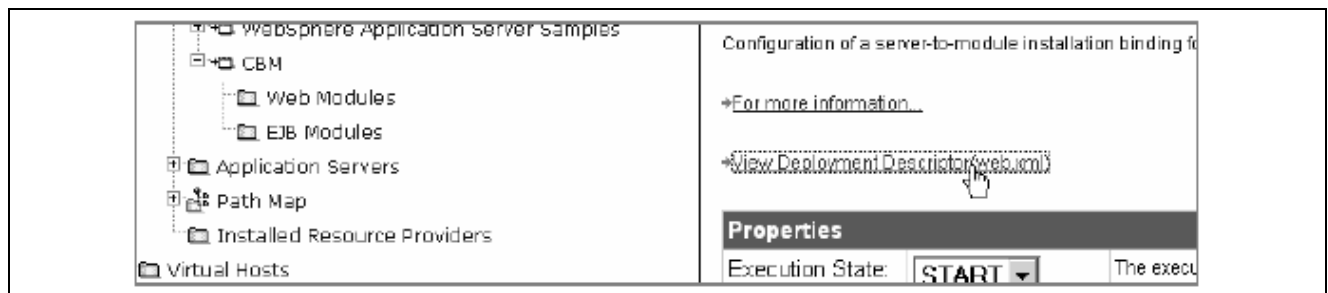


IBM WebSphere Application Server - IBM WebSphere Administration Domain structure

33. In the right pane, click the Configuration needs to be saved link, to save the configuration.

34. Open the CBM tree node and select the child node called Web Modules.

The IBM WebSphere Administration Domain structure shows the CBM folder containing the Web Modules and EJB Modules folders.



IBM WebSphere Administration Domain structure showing the Web Modules and EJB Modules folders within the CBM folder

35. In the right pane, click the View Deployment Descriptor (web.xml) link.

The following page displaying the Web.xml configuration details appears:



IBM WebSphere - Web.xml configuration details page

36. Click Exit to exit the administration interface.

Save, if you are prompted to do so.

37. In the command prompt, enter the following to restart the web server:

```
C:\Apps\WebSphere\AppServer\bin> stopserver & startserver
```

38. After the server completes booting up, you can load the output log in any text editor by entering the following:

```
C:\Apps\WebSphere\AppServer\bin> gvim C:\Apps\WebSphere\AppServer\logs\default_⇒
server_stdout.log
```

39. Scroll all the way down to the bottom of the log and then upwards to the top, to thoroughly review the log file.

If all is well, you should find lines similar to the following:

```
[02.05.30 20:26:56:527 PDT] 3ceaaee81 WebGroup      I SRVE0091I: [Servlet LOG]:⇒
ScoreServer: init[02.05.30 20:26:56:547 PDT] 3ceaaee81 WebGroup      I⇒
SRVE0091I: [Servlet LOG]: ScoreServer: configuration file: c:\test⇒
\deployer.cfg[02.05.30 20:26:56:547 PDT] 3ceaaee81 WebGroup      I SRVE0091I: ⇒
[Servlet LOG]: ScoreServer: feedback to be written to c:\test\feedback[02.05.30⇒
20:26:56:597 PDT] 3ceaaee81 WebGroup      I SRVE0091I: [Servlet LOG]: Score⇒
Server: connect to jmitche2041502:5680
```

These log entries indicate that the servlet has been initialized, found its config file, and connected to a scoring engine.

**Note.** You will see errors if the online configuration work has not yet been completed. This is not a problem. Once the online configuration is complete, simply restart the web-server.

---

**Note.** There are default sample applications that come pre-installed on IBM WebSphere. If this is a new IBM WebSphere installation, ensure that you uninstall any such applications. To do so, in the same location where you clicked the Install button, select the check boxes next to the two sample applications, and then click the Uninstall button. The system prompts you again before unloading them. Go ahead and unload them, doing so does not delete them from disk, so they can still be reattached as necessary.

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**Note.** If you are also running PeopleSoft Pure Internet Architecture on the same web server, you will have a conflict with the *context root* of the servlet application that will cause the scoring facility not to work. In this case, you must create a host alias in the configuration tool and assign the ScoreServer servlet to this host alias. You can refer to the IBM WebSphere documentation that IBM provides with their software for further instructions on how to configure host aliases.

---

---

## Task B-2: Modifying psappsrv.cfg File

To modify psappsrv.cfg:

1. Verify that the *com.peoplesoft.epm.cr.jar* file is located in *PS\_HOME\class*, or *PS\_HOME\appserv\classes* on UNIX.
2. Using a text editor, modify the psappsrv.cfg file as follows:

- a. Locate the following line:

Add to CLASSPATH=

- b. Append text to the end of that line, depending on your application server platform:

On Microsoft Windows/NT, append as follows:

`%PS_HOME%\class\com.peoplesoft.epm.cr.jar`

On UNIX, append as follows:

`%PS_HOME%/appserv/classes/com.peoplesoft.epm.cr.jar`

---

## Task B-3: Installing Additional Component Software on the Process Scheduler Machine

All additional component integration libraries must be ordered directly from their respective vendors. Oracle does not ship or resell these items.

A simple configuration is to install the vendor integration libraries on the Microsoft Windows NT Process Scheduler. In a production environment, it can be distributed across multiple machines, but that is considered an advanced configuration and not discussed here.

There are also required configuration files that are created from the PeopleSoft EPM and PeopleSoft Pure Internet Environment, or created manually. This is covered in detail in the PeopleSoft Enterprise Customer Behavior Modeling PeopleBook. The following steps ensure that these configuration files are created correctly.

To install Angoss on the Process Scheduler machine, you must do the following:

1. Run Microsoft Windows NT on your Process Scheduler machine.

2. Order the PeopleSoft Real Time Scoring package from Angoss.
3. Unzip the vendor file to C:\TEMP\angoss, and then run setup.exe.
4. Select the Custom installation step, and then select the directory in which you want to install Angoss. A good suggestion is C:\angoss.
5. Angoss delivers a license file that must be installed in: *ANGOSS\_HOME*\PSFT\_RTS\_Windows.  
*ANGOSS\_HOME* is the path where Angoss installs.
6. Follow the instructions that are included with Angoss in their INSTALL.TXT file to run the validation program from the command line.

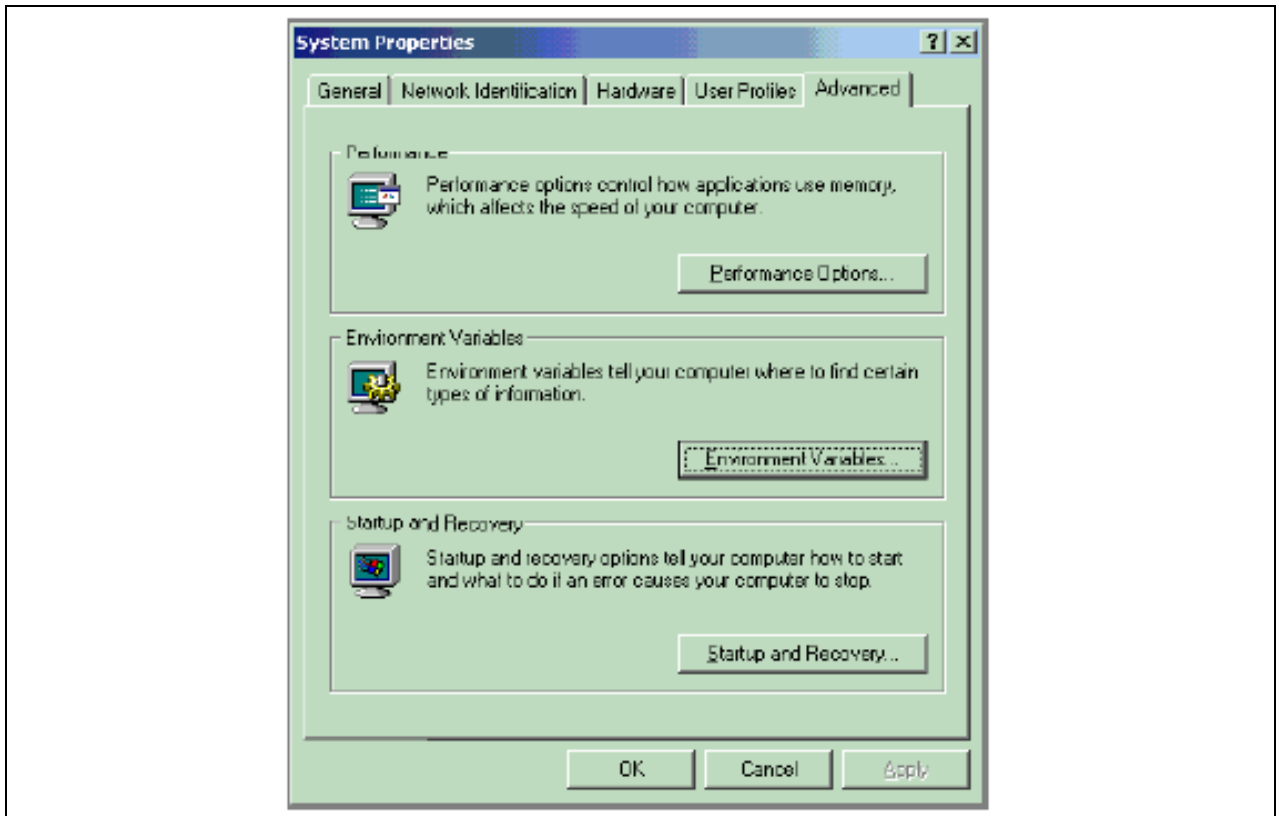
---

## Task B-4: Installing the PeopleSoft EPM Adapter Library File

In this task you install an adapter file for the vendor, ps\_angoss.dll, in the vendor directory. For example: C:\angoss

To install using Angoss, do the following:

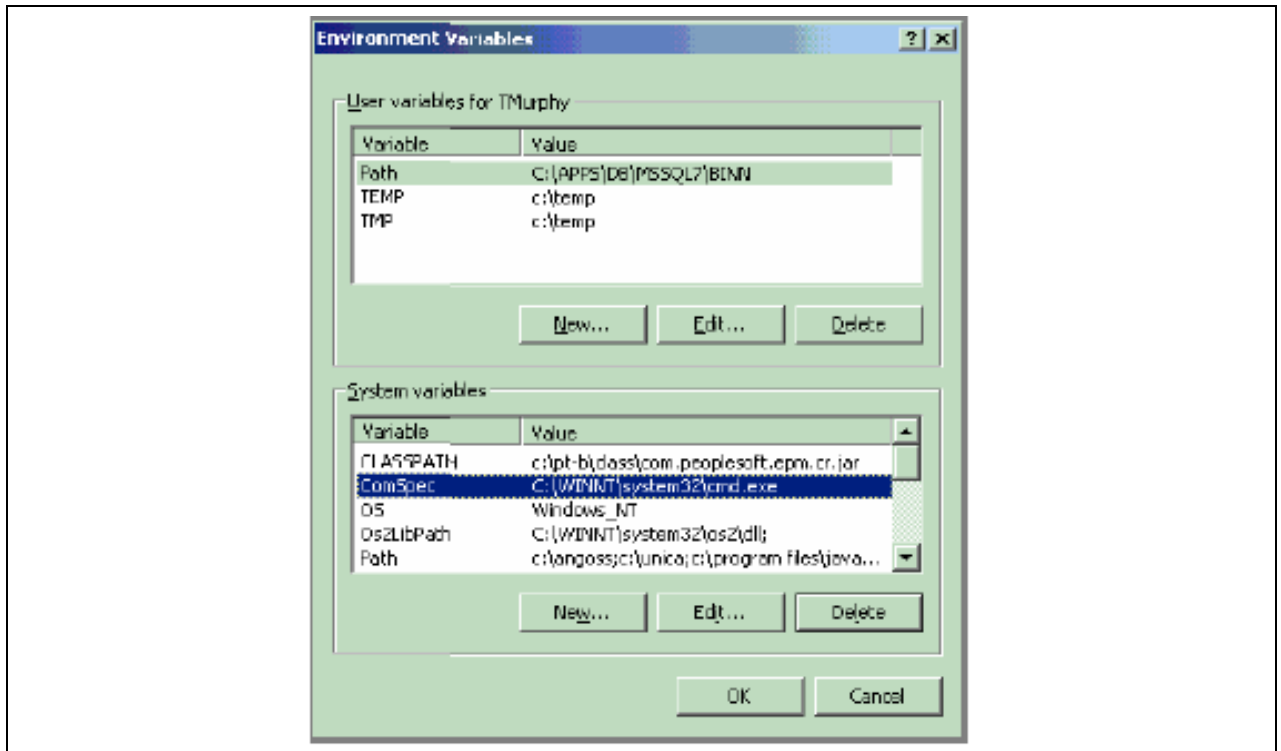
1. Move ps\_angoss.dll from *PS\_HOME*\bin\server\winx86\ to c:\*ANGOSS\_HOME*.
2. Enter the full path of Angoss and com.peoplesoft.epm.cr.jar into the Path and CLASSPATH system variables on Microsoft Windows NT:
  - a. From your Desktop, right-click on My Computer, and then select Properties.  
The System Properties option page appears.



My Computer - System Properties option page

- b. Click the Environment Variables button.

The Environment Variables option page appears.



My Computer - Environment Variables option page

- c. In the System Variables section, select CLASSPATH, click the Edit button, and then append the full path to *com.peoplesoft.epm.cr.jar*.  
If CLASSPATH does not exist, click the New button and create a new entry.
- d. In the System Variables section, select Path, click the Edit button, and then append the full path to the Angoss install directory. For example: *c:\angoss\bin*
- e. Click OK.

## Task B-5: Modifying Microsoft NT Process Scheduler Configuration File

In this task you modify the Microsoft Windows NT Process Scheduler configuration file *psprcs.cfg* as follows:

**Note.** These instructions assume that Angoss is already installed on the same physical machine as the Microsoft Windows NT Process Scheduler.

1. Use a text editor to modify *psprcs.cfg*:
  - a. Locate the line:
 

```
Add to PATH=%WINDIR%;%WINDIR%\SYSTEM32
```
  - b. Append the following text to the end of that line:
 

```
;c:\angoss\bin
```

- c. Locate the line:

Add to CLASSPATH=

- d. Append the path to where com.peoplesoft.epm.cr.jar is installed.

For example: Add to CLASSPATH=%PS\_HOME%\class\com.peoplesoft.epm.cr.jar

- e. Add the following line immediately after Add to CLASSPATH:

JavaVM Options=-Djava.library.path=c:\angoss\bin\

2. Stop and restart the server.
3. Enter your PeopleSoft Pure Internet Architecture environment, and then update the Server Definition to include the PeopleSoft EPM CBM Java process type.

If you use the default PSNT Server Definition, do the following:

- a. Select PeopleTools, Process Scheduler, Servers.
- b. Search for and then select *PSNT*.
- c. In the *Process Types run on this server* section, add a new row, click the look up icon, and then select EPM CBM Java.

Set the Priority to *Medium* or *High*, and set the Max Concurrent to *10*.

- d. Verify that the Server Definition includes *PSJob* and *Application Engine*.

4. Stop and restart the Process Scheduler.
5. Use a text editor to modify pspresrv.env as follows:

- a. Locate the line:

PATH=

- b. Append the following text to the end of that line: ;c:\angoss\bin

This is the path to the angoss bin directory.

6. Stop and restart the Process Scheduler.

---

## Task B-6: Ensuring Appropriate Permissions are Set

PeopleSoft Customer Behavior Modeling must be able to write to some configuration files to start and stop Scoring Engines. To do this, you must be able to write files to the Process Scheduler using a PeopleSoft Pure Internet Architecture setup page. For example, if your machine name is PRCS1, and you share out the c:\angoss directory, then you must be able to write files to \\PRCS1\angoss.

To ensure that permissions are set, do the following:

1. Log onto the PeopleSoft Pure Internet Architecture using the User ID VP1.
2. Select Customer Behavior Modeling, Setup, Data Mining Infrastructure, Scoring Engine Definition.
3. Click the Search button.
4. Select a scoring engine from the list of those available. It does not matter which one you select.
5. In the Config File field, enter the path and name of the file that you want to create.



You can give the configuration file any name. For this example, the configuration file is named `angoss_engine.cfg`. In this example, you would enter `\\PRCSI\angoss\angoss_engine.cfg` into the Config File field.

You can refer to the *PeopleSoft Customer Behavior Modeling PeopleBook* for more information. The entire data mining setup and configuration process must complete before you can write the configuration files.

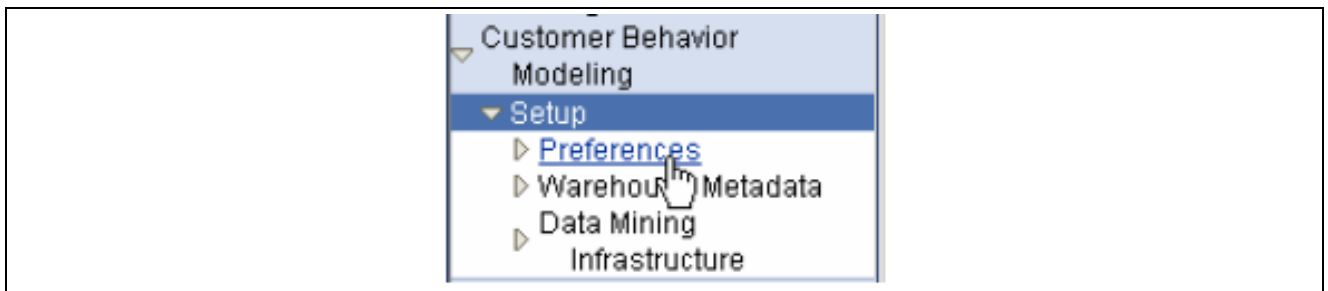
## Task B-7: Designating a Vendor Model File Directory

You must designate a directory to hold vendor model files. This can be physically on the Process Scheduler (easiest), or in a directory that is mapped from the Process Scheduler. A simple option is to designate a subdirectory in the vendor install directory. For example, `c:\angoss\my_models`. End users should be able to write models to this directory.

To designate a vendor model file directory, do the following:

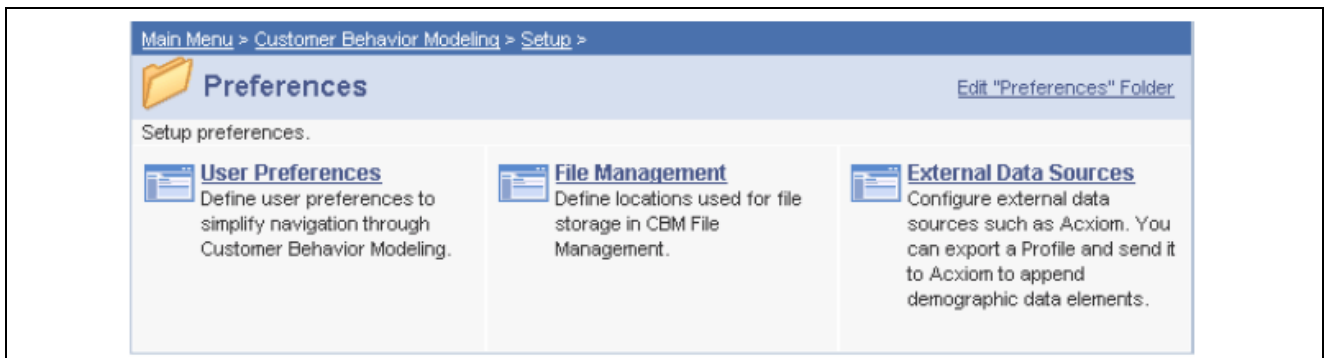
1. Log on to the PeopleSoft Pure Internet Architecture using VP1 as the User ID.

From the PeopleSoft Portal left pane navigation, select Customer Behavior Modeling, Setup, Preferences.



PeopleSoft Left Pane Navigation Menu

The PeopleSoft Customer Behavior Modeling Setup Main Menu appears.



PeopleSoft Customer Behavior Modeling Setup main menu

2. On the Behavior Modeling Setup Preferences main page, click the File Management link.
3. Click the Search button.

Your search results display.

Search Results	
View All	First ◀ 1-4 of 4 ▶ Last
User Option Value	Description
<a href="#">FTP1</a>	<a href="#">FTP test server</a>
<a href="#">MODELFILES</a>	<a href="#">Model files on testserver</a>
<a href="#">SERVDIR</a>	<a href="#">Default server directory</a>
<a href="#">TESTSERVER</a>	<a href="#">Test server harddrive</a>

Search Results showing MODELFILES

- Click the MODELFILES link from the search results.

The PeopleSoft CBM File Management page appears.

## CBM File Management

**Option Value:** MODELFILES

**Description:**

**Group Box**

☐ FTP Flag

**File Path:**

**FTP Target:**

**FTP String:**

[Return Home](#)

PeopleSoft CBM File Management page

- On the CBM File Management page, edit the File Path entry to point to where you want the models to install.
- Click Save.

## Task B-8: Modifying Installation Options

Within the PeopleSoft Customer Behavior Modeling application, you must indicate the Data Mining vendor that you are using.

To indicate your Data Mining vendor, do the following:

1. Log on to the PeopleSoft Pure Internet Application using the VP1 User ID.
2. Select EPM Foundation, EPM Setup, Installation Options, Web Services.
3. In the CBM Options/Model Vendor group box, ensure that Angoss is selected.

---

## **Task B-9: Ensuring the Sun Java Executable is on the Command Path**

You can edit your pspres.cfg file to get the java interpreter onto the command path for process-scheduler processes by adding the path to the Add to Path configuration option.

The Sun Java.exe is located at:

- %PS\_HOME%\jre\bin, for a Microsoft Windows installation.
- %PS\_HOME%/jre/bin, for a Unix installation.

Ensure that you reconfigure the process scheduler afterwards.



## APPENDIX C

# Oracle Discoverer on PeopleSoft EPM

This appendix discusses:

- Reviewing Related Documentation
- Reviewing Supported Platforms
- Installing Oracle Discoverer and PeopleSoft EPM Tables in one Database
- Reviewing Prerequisites for Installing Oracle Business Intelligence Tools
- Creating the End User Layer
- Accessing and Importing the EEX File
- Granting Users Permission to Access Business Areas
- Installing Sun Java Plugin from Microsoft IE
- Securing the Reports (Optional)

This chapter discusses how to implement Oracle Discoverer reporting solutions for EPM 9.1 applications.

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## Reviewing Related Documentation

This chapter is not intended to replace the documentation that is delivered with the PeopleSoft Enterprise Performance Management PeopleBooks, nor the Oracle Discoverer documentation. Many of the fundamental concepts useful in implementing PeopleSoft EPM Warehouse Reports on Oracle Discoverer can be found in the following documents:

- *Oracle Business Intelligence Installation Guide 10g Release 2 (10.1.2.1).*
- *PeopleSoft Enterprise Performance Management Warehouse Peoplebook.*

If you are implementing security for your Multi-Dimensional Warehouse Reports in Oracle Discoverer, Oracle recommends that you read the Oracle Business Intelligence Discoverer Certification for PeopleSoft EPM Row Level Security Red Paper.

You can access the documents that we reference in this guide, along with other information about Oracle Business Intelligence (such as white papers, best practices, documentation updates, other collateral), on the Oracle Technology Network at: <http://www.oracle.com/technology>.

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## Reviewing Supported Platforms

Oracle Business Intelligence Tools are supported on Microsoft Windows, Sun Solaris Operating System (SPARC), and Linux x86. The details of hardware, operating system, database, browser and other software requirements are available in *Oracle Business Intelligence Installation Guide 10g Release 2 (10.1.2.1)*: Section 2: “Oracle Business Intelligence Requirements”.

---

## Installing Oracle Discoverer and PeopleSoft EPM Tables in one Database

Oracle Discoverer creates approximately 50 tables that start with the string EUL5\_ in its own schema. These tables store metadata about business areas, reports, joins, hierarchies, users, and so on. The owner of this schema is the Oracle Discoverer Administrator. The PeopleSoft EPM tables that contain the data that is rendered by the reports can be hosted in its own schema. Both the Oracle Discoverer and PeopleSoft EPM schemas can exist in the same database, with the following privileges assigned to Oracle Discoverer users:

- Users who only execute reports must have read permission on Oracle Discoverer and PeopleSoft EPM schemas.
- Users who create the business areas and any other objects in EUL must have select, insert, update and delete permissions on the Oracle Discoverer schema and at least select permission on the PeopleSoft EPM schema.

You can learn more about permissions by referring to the “Granting Users Permission to Access Business Areas” section in this appendix chapter.

---

## Task C-1: Reviewing Prerequisites for Installing Oracle Business Intelligence Tools

Installing Oracle Business Intelligence Tools, to include the installation of the Oracle Application Server, Oracle Discoverer Administrator and Oracle Discoverer Desktop, can be found in the *Oracle Business Intelligence Installation Guide 10g Release 2 (10.1.2.1)*: Section 4, “Installing Oracle Business Intelligence.”

After successful installation, you can use a tool such as Microsoft SQL \*Plus to verify your connectivity to the Oracle database (both Oracle Discoverer and PeopleSoft EPM schema using appropriate user IDs).

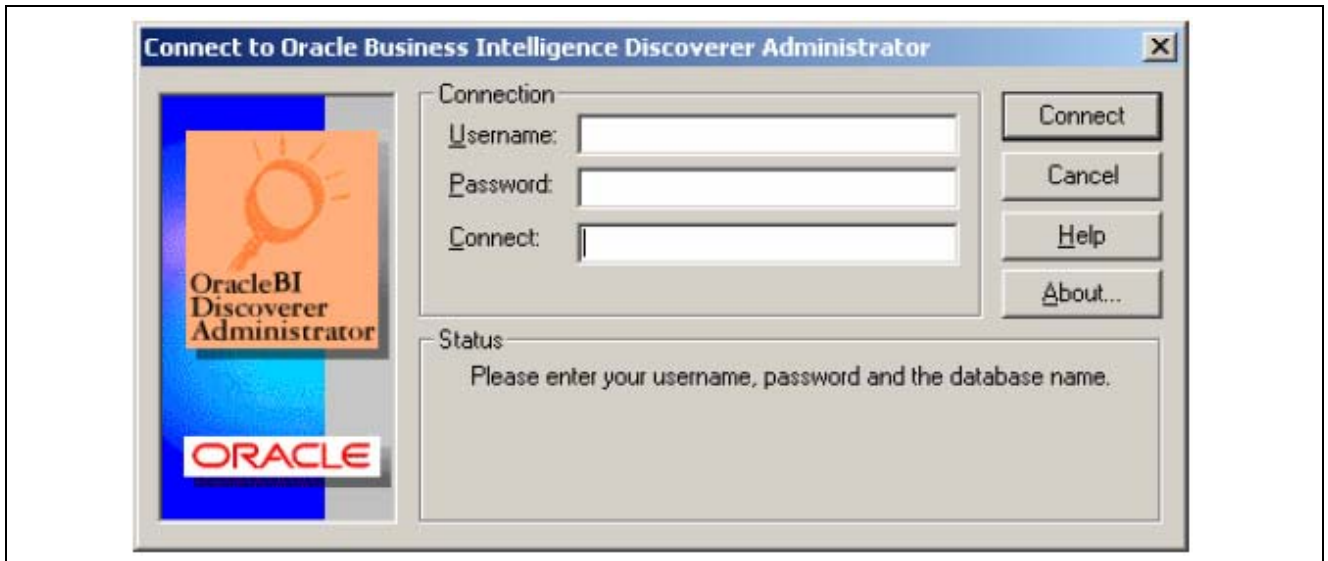
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## Task C-2: Creating the End User Layer

Before you can configure Oracle Discoverer for PeopleSoft EPM, you must create the end user layer (EUL) as follows:

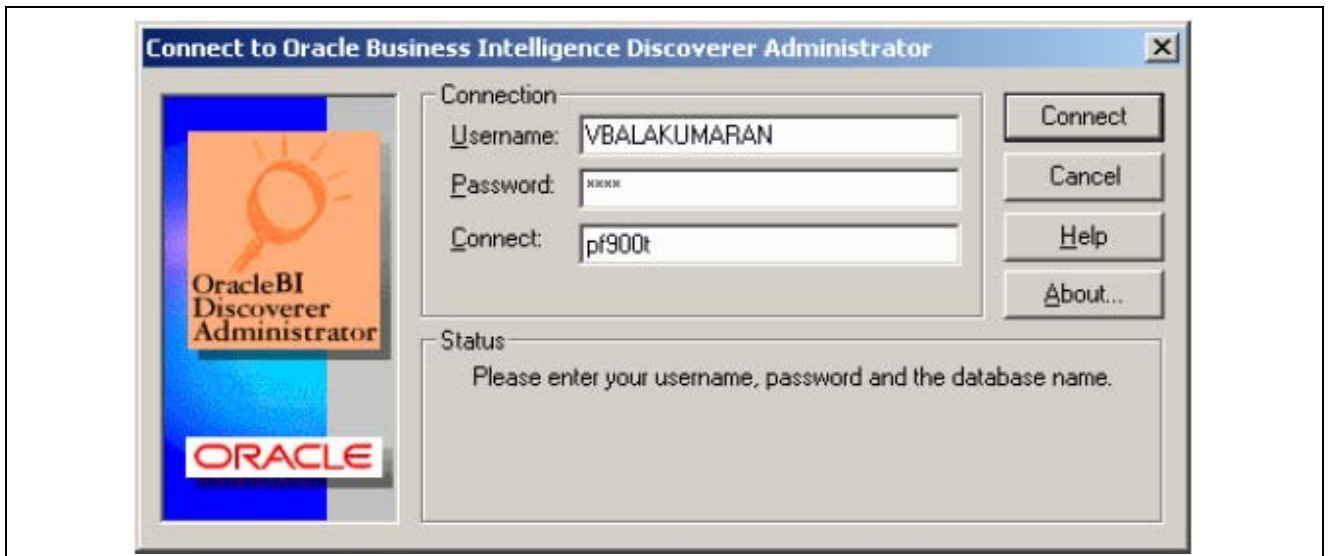
1. Open the Oracle BI Discoverer Administrator by selecting Start, Programs, Oracle Business Intelligence Tools-BIToolsHome, Oracle Discoverer Administrator.

The Connect to Oracle Business Intelligence Discoverer Administrator page appears.



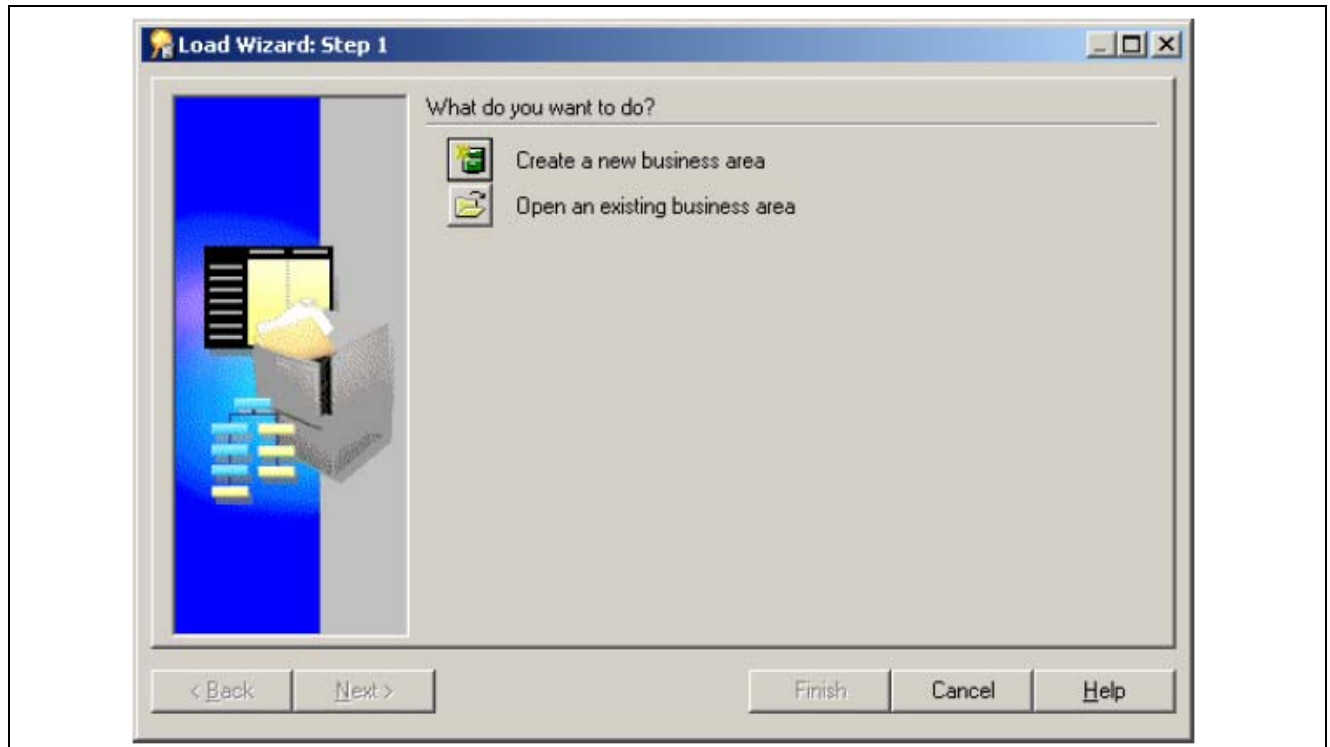
Connect to Oracle BI Discoverer Administrator page

2. On the Connect to Oracle Business Intelligence Discoverer Administrator page, enter the following:
  - In the Username field, enter the username to access connection to the machine where the Oracle Discoverer metadata is located.
  - In the Password field, enter the password to access connection to the machine where the Oracle Discoverer metadata is located.
  - In the Connect field, enter the connect string to the database where the Oracle Discoverer EUL is located. information.
3. Click the Connect button to start the connection to the database.



Connect to Oracle Business Intelligence Discoverer Administrator showing an example of connection information

The Load Wizard: Step 1 page appears.

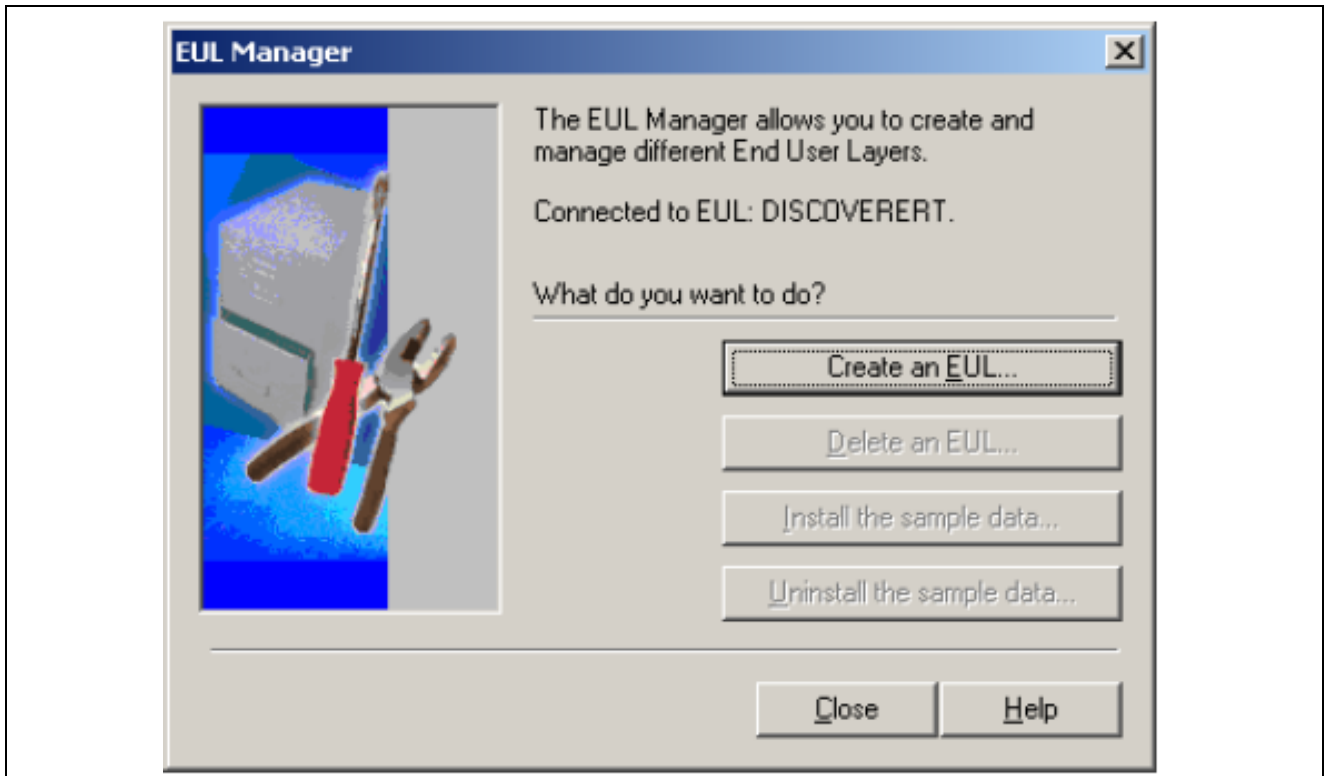


Load Wizard: Step 1 page

Since you have not yet created any End User Layer (EUL), you cannot create a new business area or open an existing business area.

4. Click the Cancel button to exit this page.
5. Select Tools, EUL Manager (or press Ctrl + E on your keyboard) to go to the Create EUL Wizard section. The EUL Manager page appears.

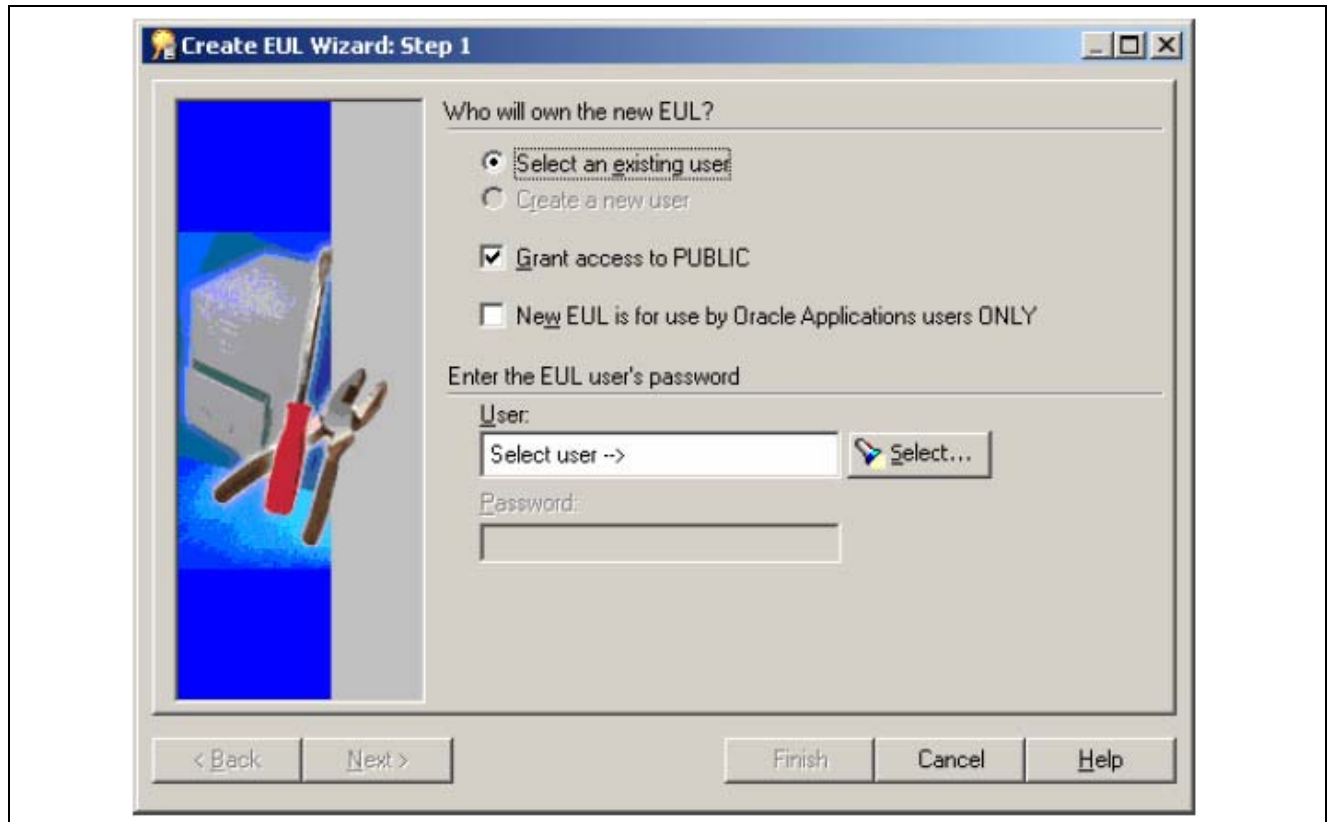




EUL Manager page where you can create and manage different End User Layers (EUL)

6. Click the Create an EUL button.

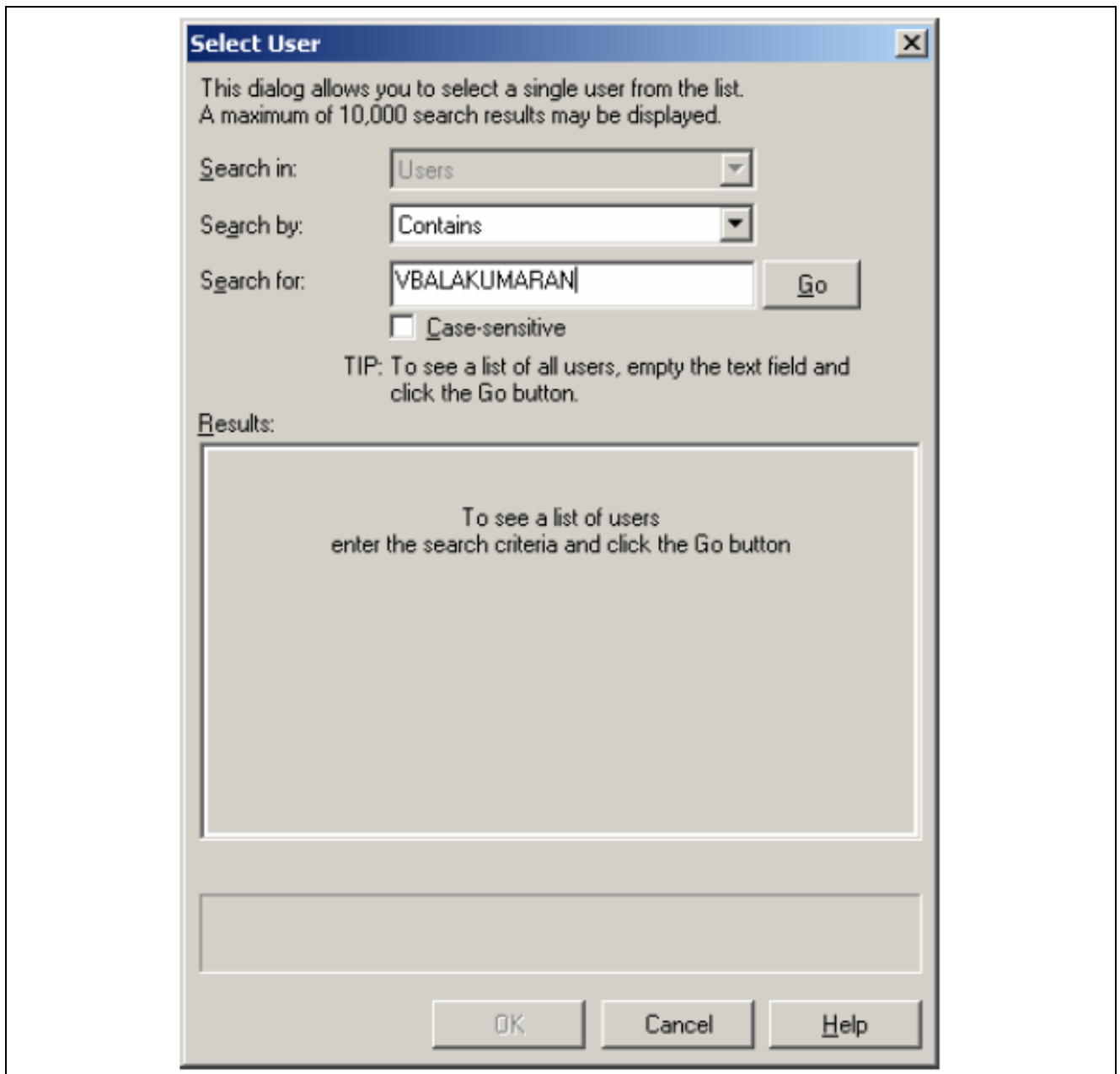
The Create EUL Wizard: Step 1 page appears.



Create EUL Wizard: Step 1 page

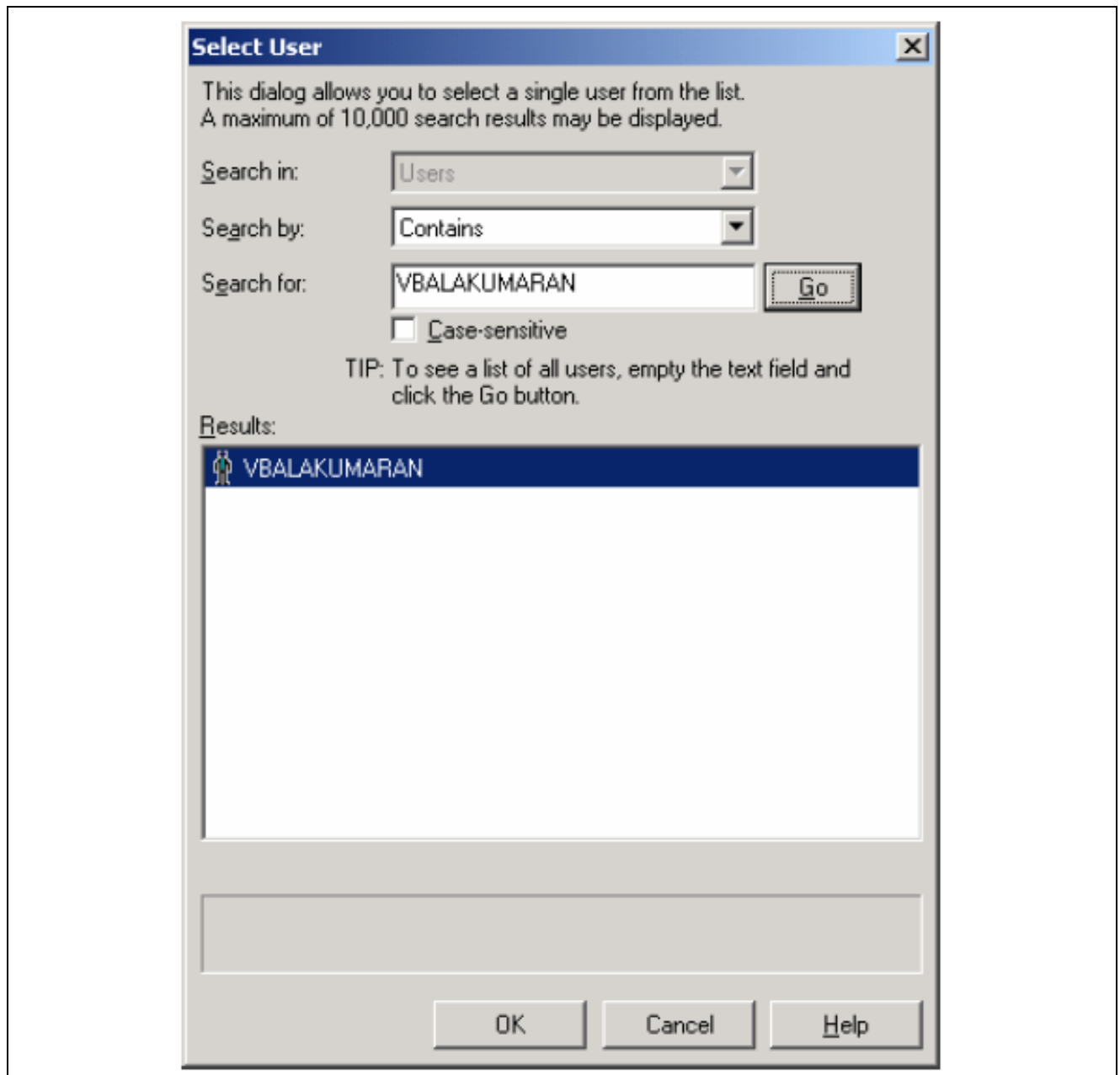
7. Click the Select button.

The Select User page appears.



Select User page

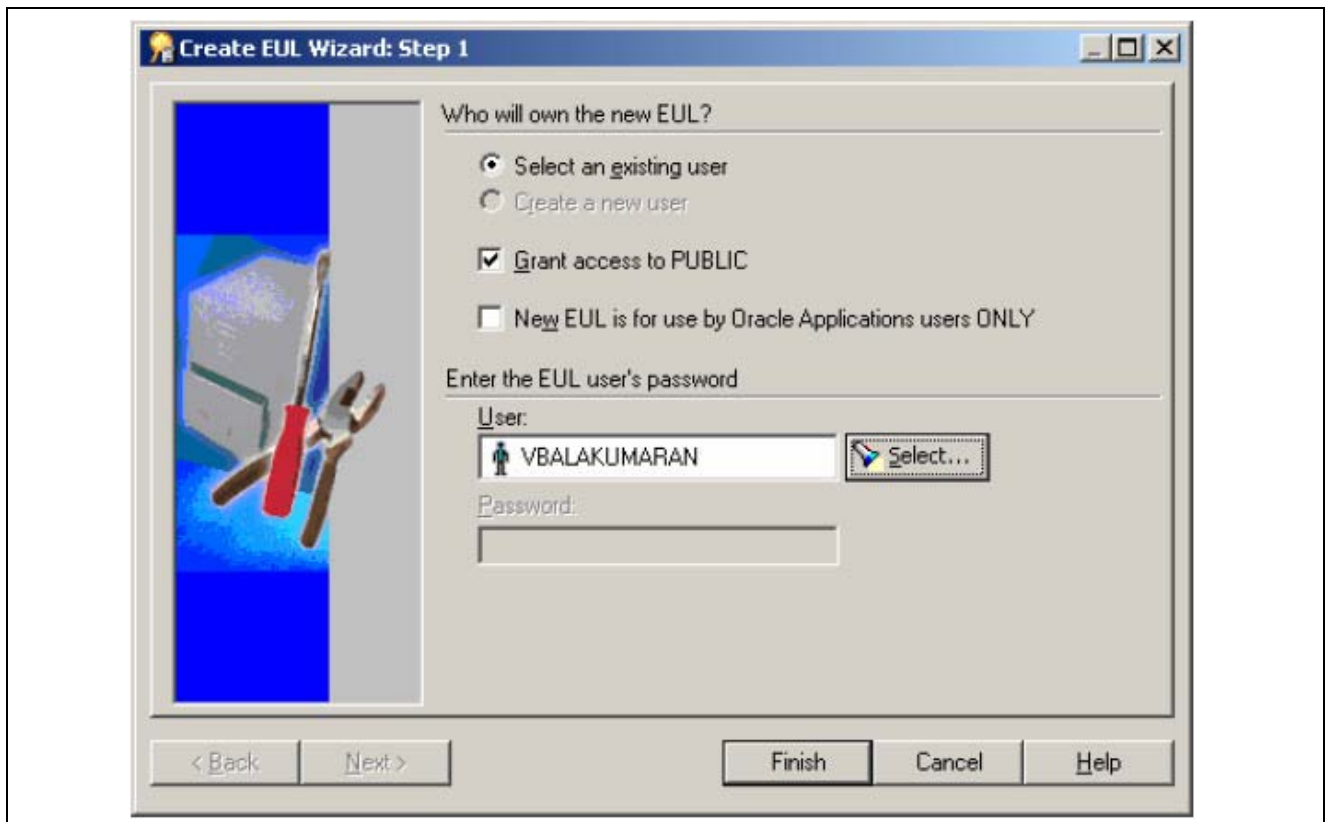
8. In the Search for field, enter the name to search for and click the Go button.  
The search results appear in the Results pane of the Select User page.



Select User page showing the results in the Results pane

9. Click the OK button to select the username.

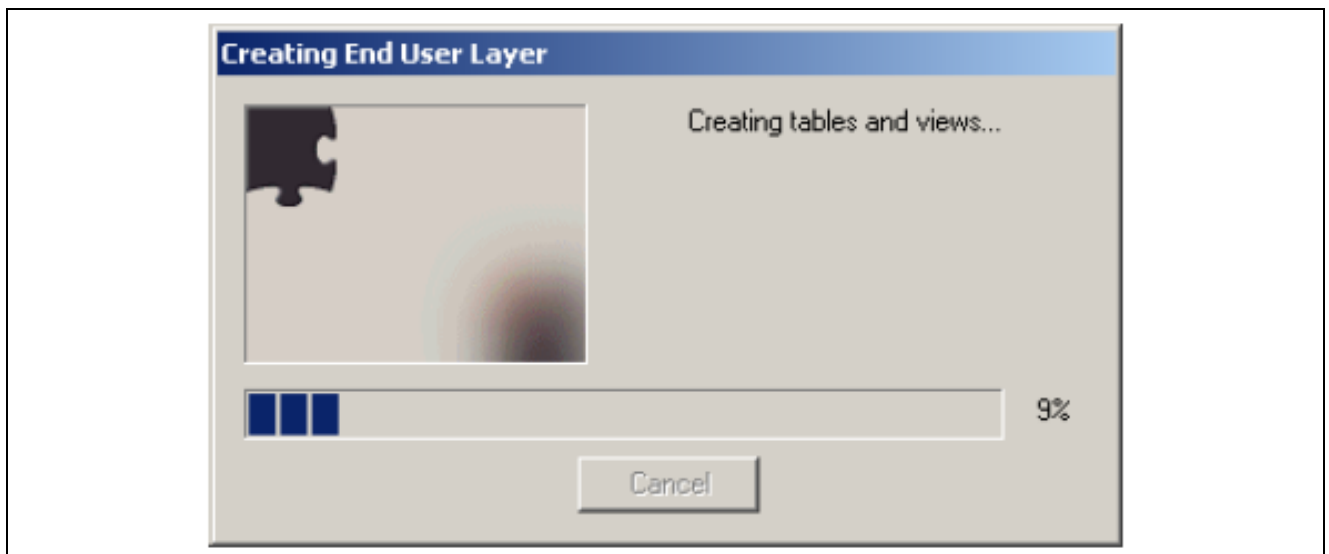
You are returned to the Create EUL Wizard Step 1 page.



Create EUL Wizard: Step 1 showing the user that you selected

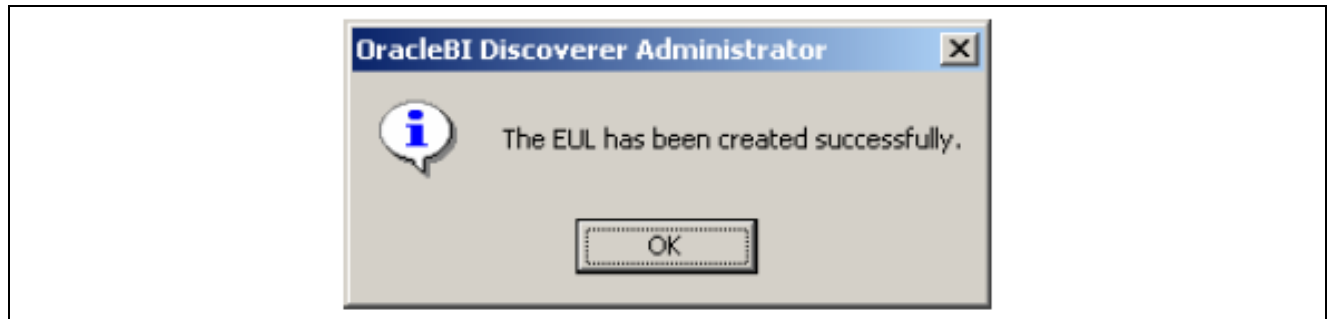
10. In the Password field, enter the password, and then click the Finish button.

The status of the new EUL that is now being created appears.



Creating End User Layer status page

After the EUL is fully created, a message that indicates the process completed successfully appears.



OracleBI Discoverer Administrator message stating that the EUL created successfully

11. Click the OK button.

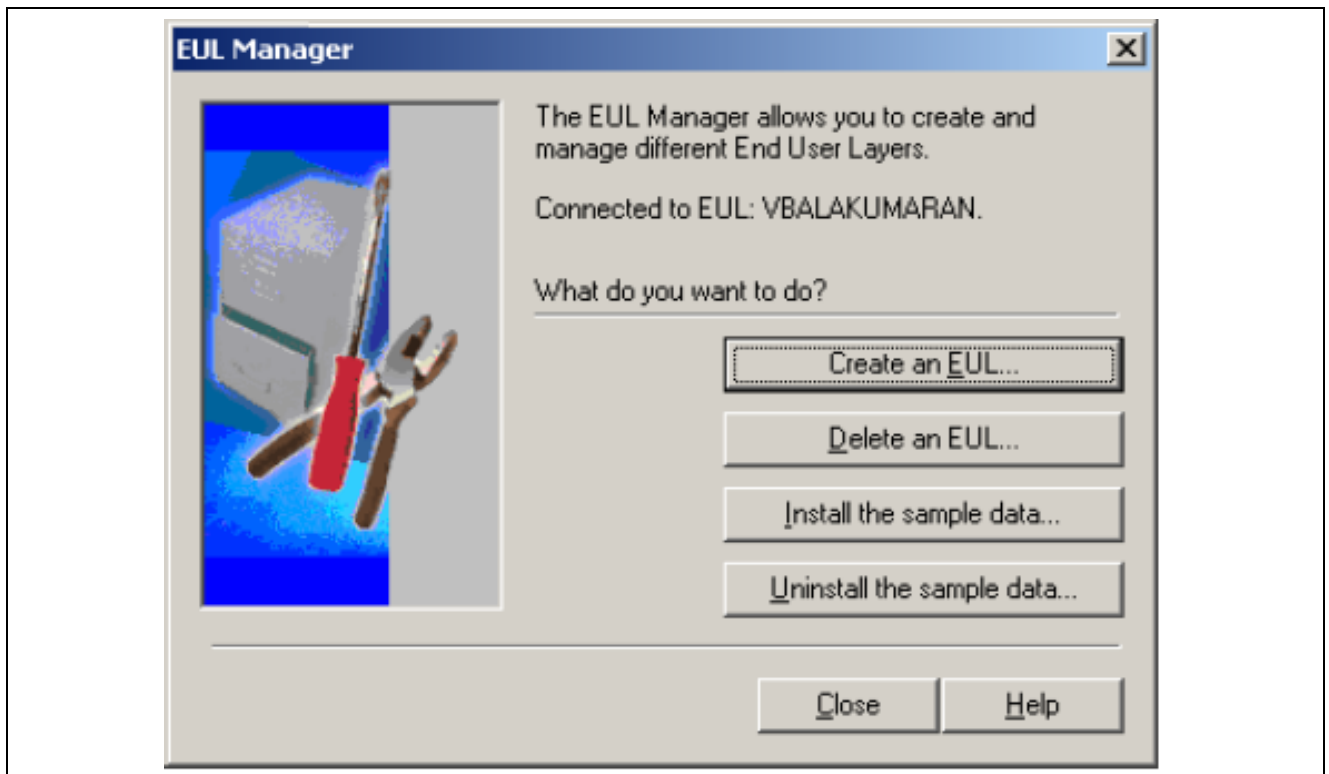
The OracleBI Discoverer Administrator page asking if you want to install the sample data in the EUL appears.



OracleBI Discoverer Administrator page asking if you want to install the sample data in the EUL

12. You may or may not choose to install the sample data. For this example, we are going to click the No button for the sample data installation option.

You are returned to the EUL Manager page.



EUL Manager page

13. Click the Close button to exit from the EUL Manager and complete the process of creating a new EUL.

## Task C-3: Accessing and Importing the EEX File

Access the EEX file as follows:

The VCD location is *PS\_HOME\bi\discoverer\EPM90\_DISCO\_EUL.ZIP*. After you locate this .EEX file in that location, unzip it using PKZIP. The extracted file is *EPM90\_DISCO\_EUL.EEX*. Use this end user layer metadata file in the following steps.

**Note.** For PeopleSoft Enterprise Global Consolidations, the Oracle Discoverer report metadata file is located in *PS\_HOME\Discoverer\GC\_900\_Discoverer.zip*. The extracted file is *GC\_900\_Discoverer.eex*.

Import the EEX file as follows:

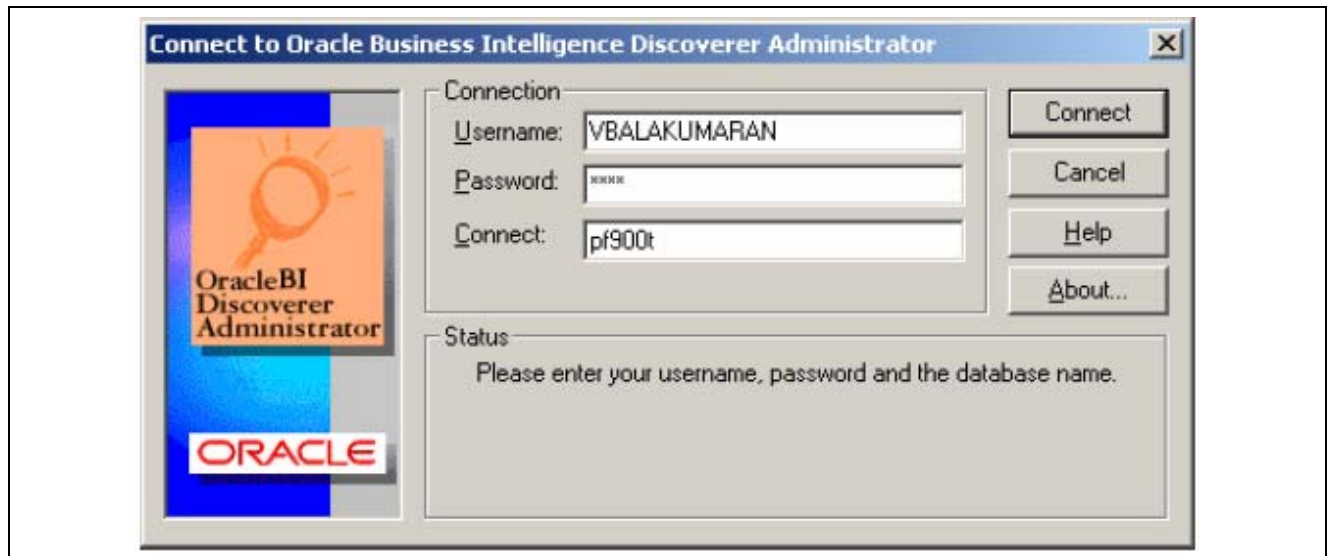
1. Open the Oracle BI Discoverer Administrator by selecting Start, Programs, Oracle Business Intelligence Tools-BIToolsHome, Oracle Discoverer Administrator.

The Connect to Oracle Business Intelligence Discoverer Administrator page appears.



Connect to Oracle Business Intelligence Discoverer Administrator page where you can enter the connection information

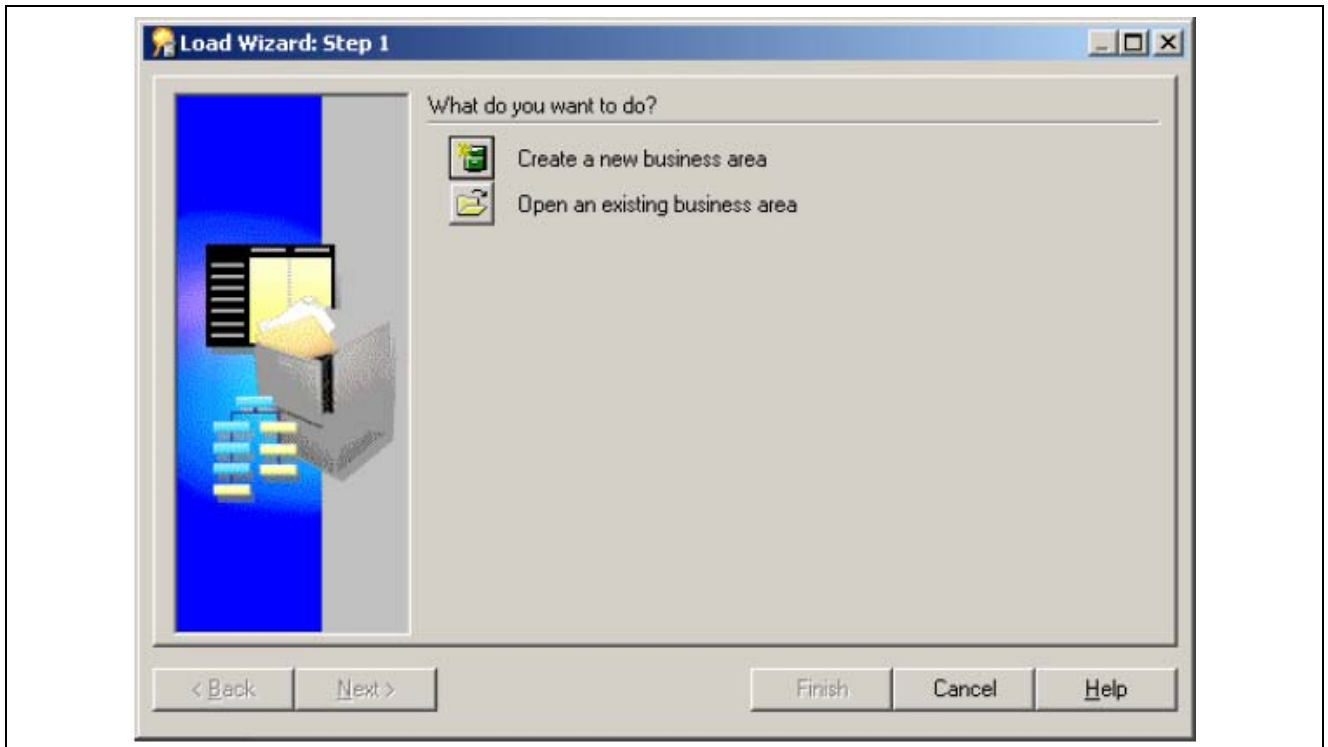
2. On the Connect to Oracle Business Intelligence Discoverer Administrator page, enter the following:
  - In the Username field, enter the username to access connection to the machine where the Oracle Discoverer metadata is located.
  - In the Password field, enter the password to access connection to the machine where the Oracle Discoverer metadata is located.
  - In the Connect field, enter the connect string to the database where Oracle Discoverer EUL is located.
3. Click the Connect button to start the connection to the database.



Connect to Oracle Business Intelligence Discoverer Administrator showing an example of connection information

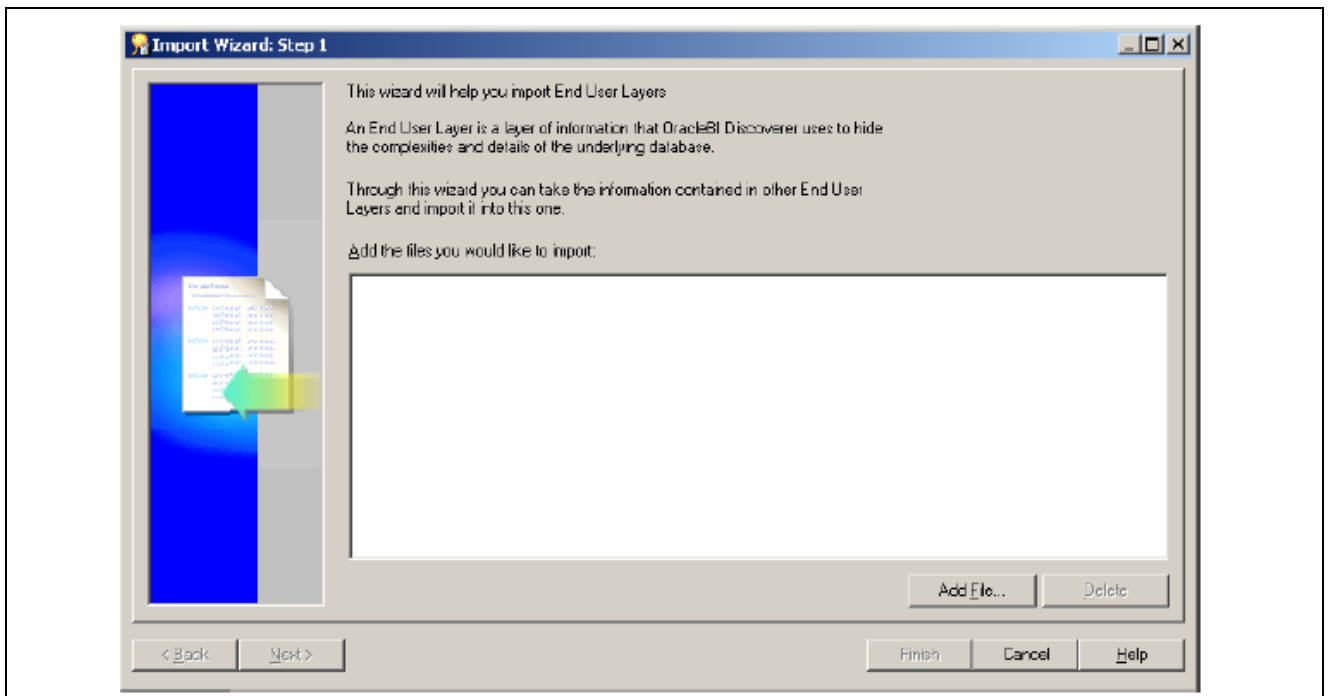
The Load Wizard: Step 1 page appears.





Load Wizard: Step 1 page asking if you want to create a new business area or open an existing one

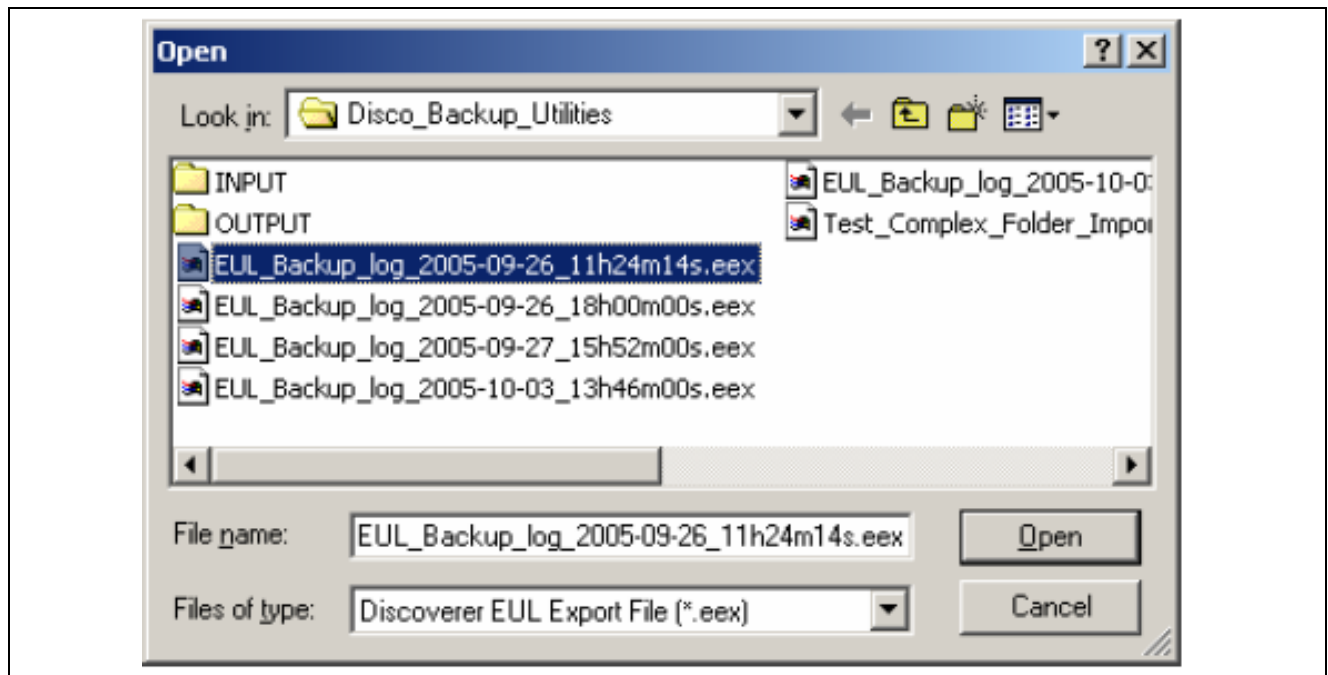
4. Click the Cancel button to exit this page.
  5. From the menu, select File, Import (or Ctrl + Shift + I on your keyboard).
- The Import Wizard Step 1 page appears.



Import Wizard: Step 1 page

6. Click the Add File button to select the .eex file that you want to import.

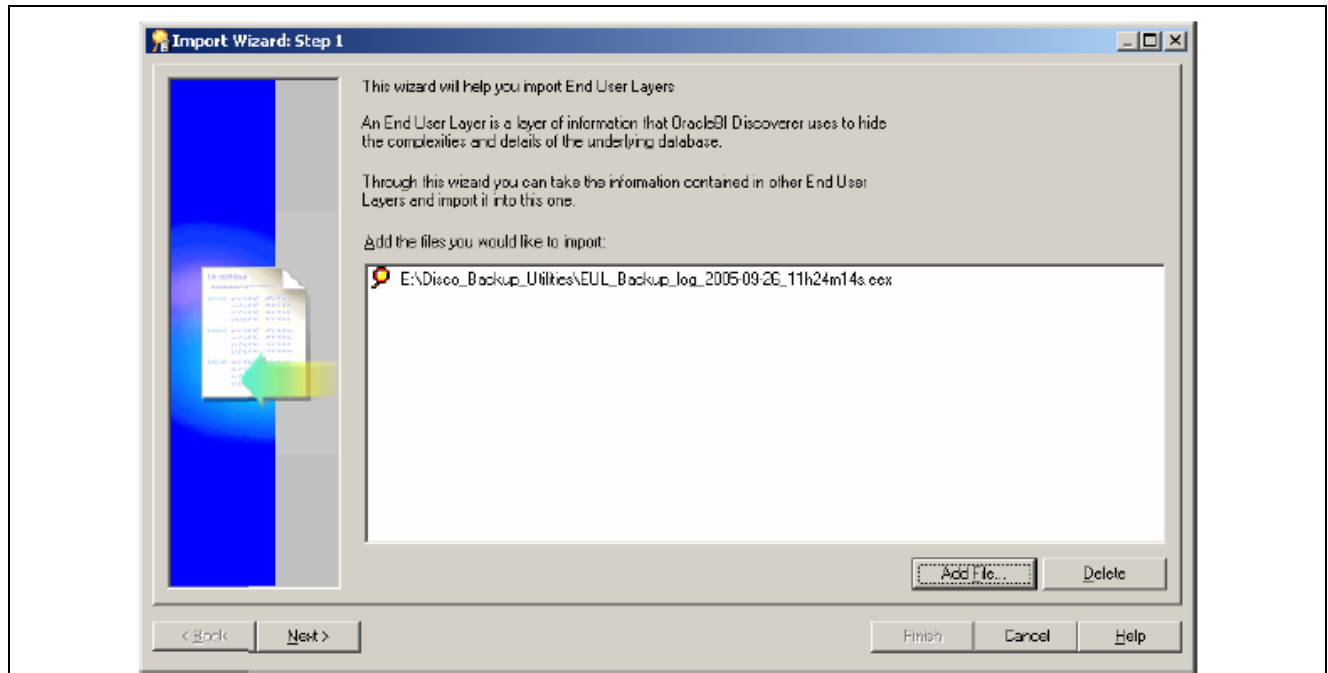
The Open dialog box appears.



Open dialog where you can select the .eex file to import

7. In the Open dialog box, select the .eex file that you want to import, and then click the Open button.

The Import Wizard: Step 1 reappears.



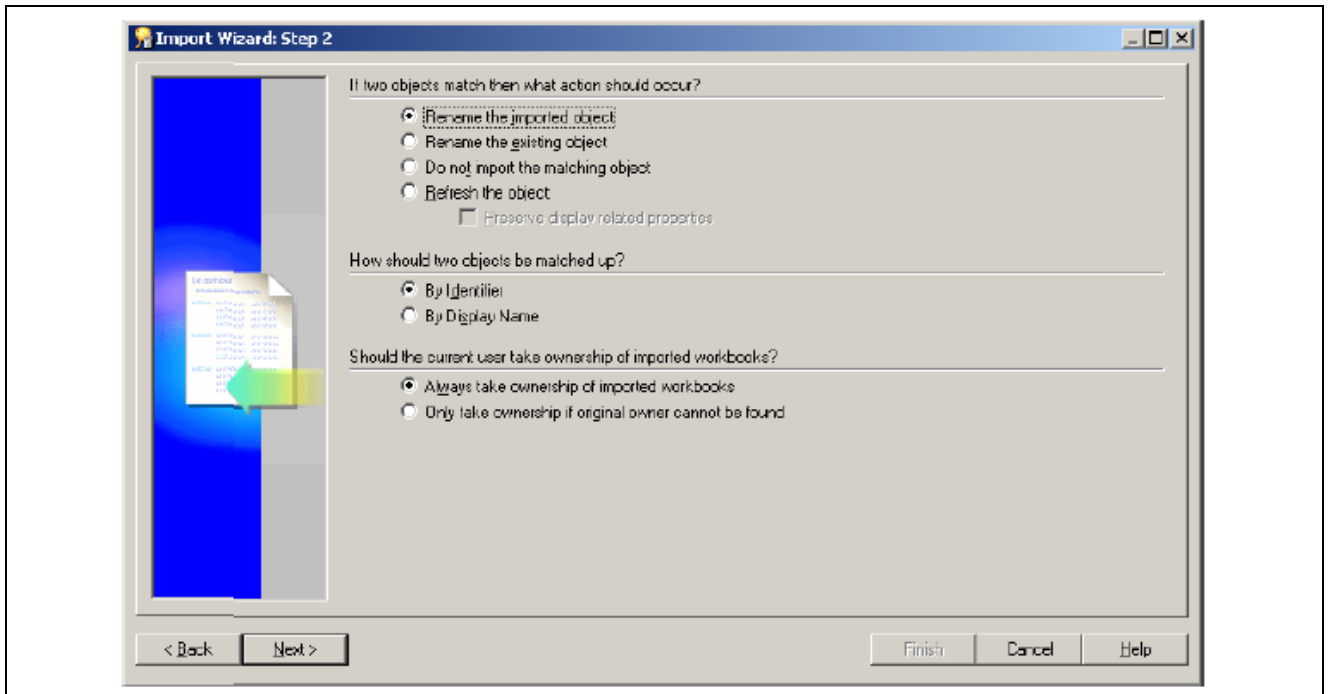
Import Wizard: Step 1 page

---

**Note.** The .eex file for the Global Consolidations Discoverer report is located in *PS\_HOME\Discoverer\GC\_900\_Discoverer.eex*.

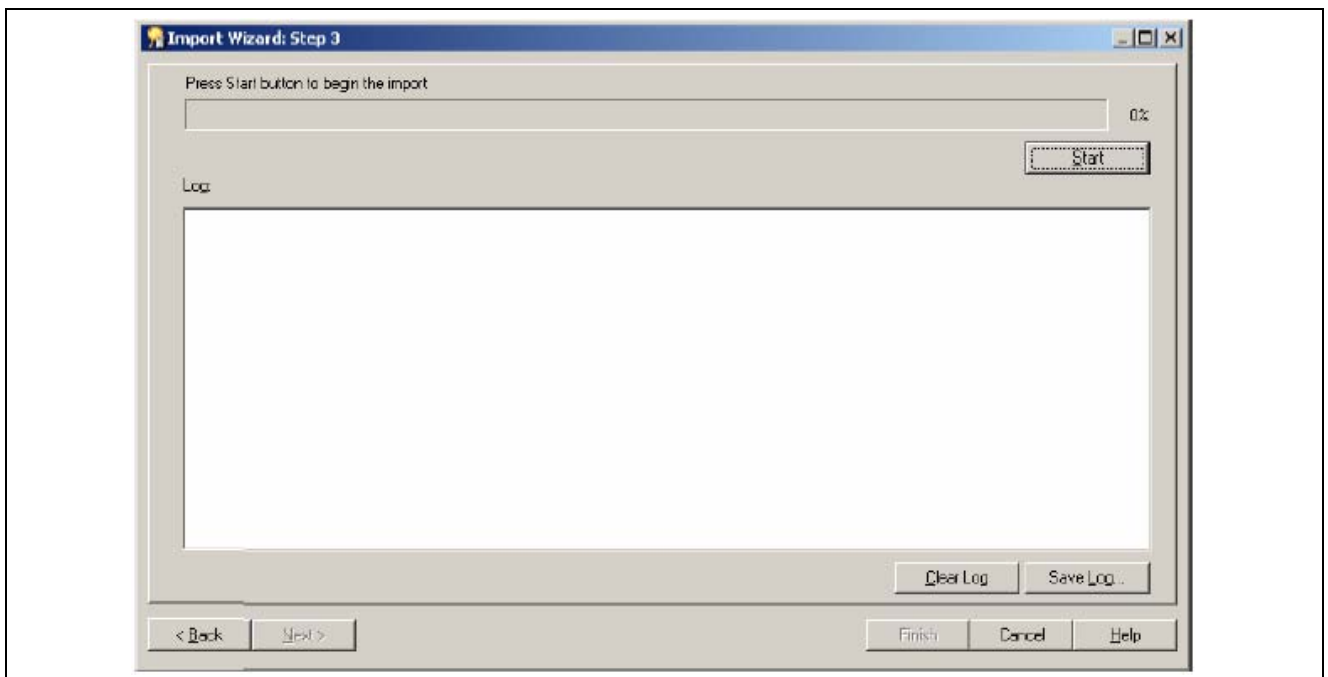
---

8. Verify the name and network path of the .eex file that you want to import, and then click the Next button.  
The Import Wizard Step 2 screen appears.



Import Wizard: Step 2 page

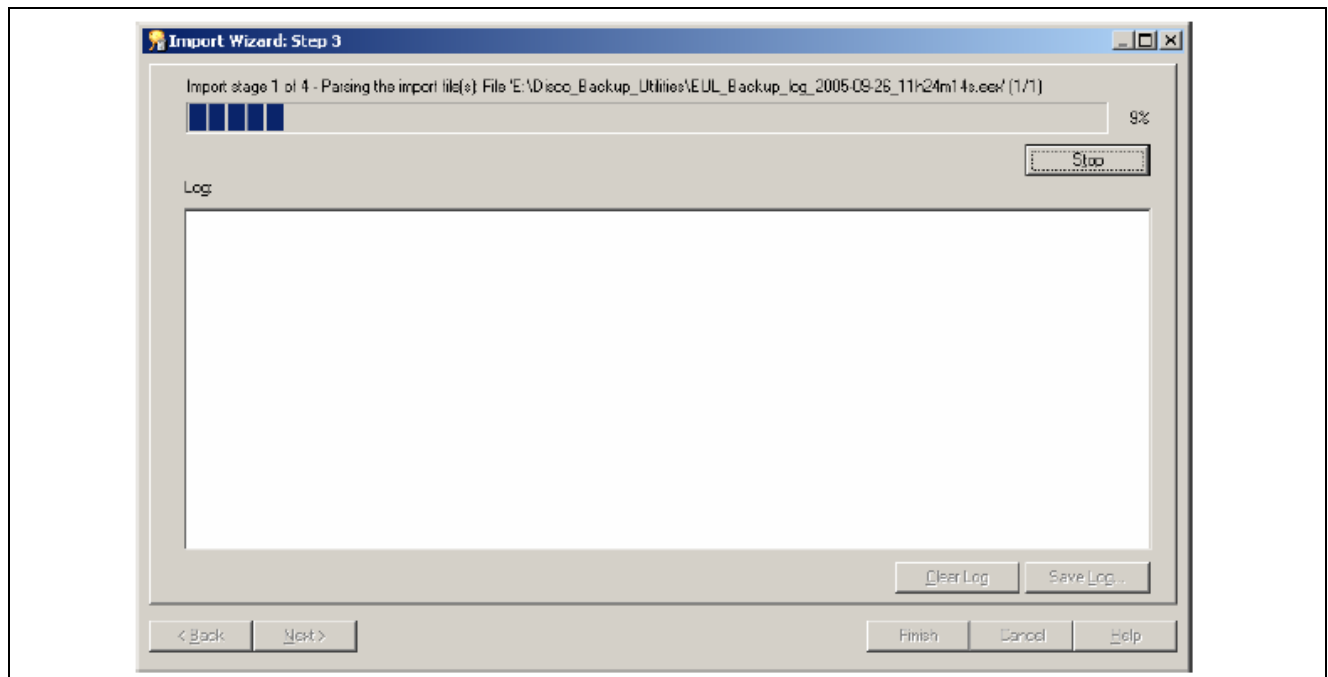
9. Change the settings as you desire, or you can leave all of the default values. Click the Next button.  
The Import Wizard Step 3 page appears.



Import Wizard: Step 3 page

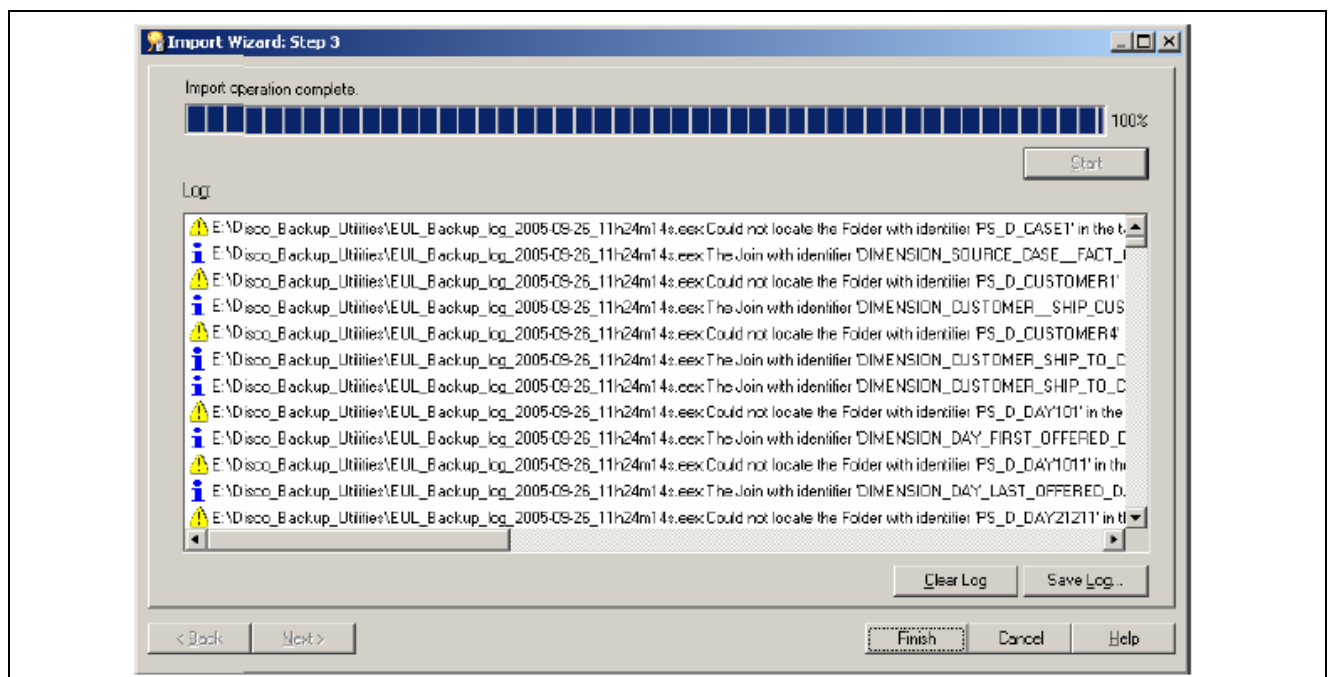
10. Click the Start button to start the import process.

The page displays the import status.



Import Wizard: Step 3 page displaying the import status

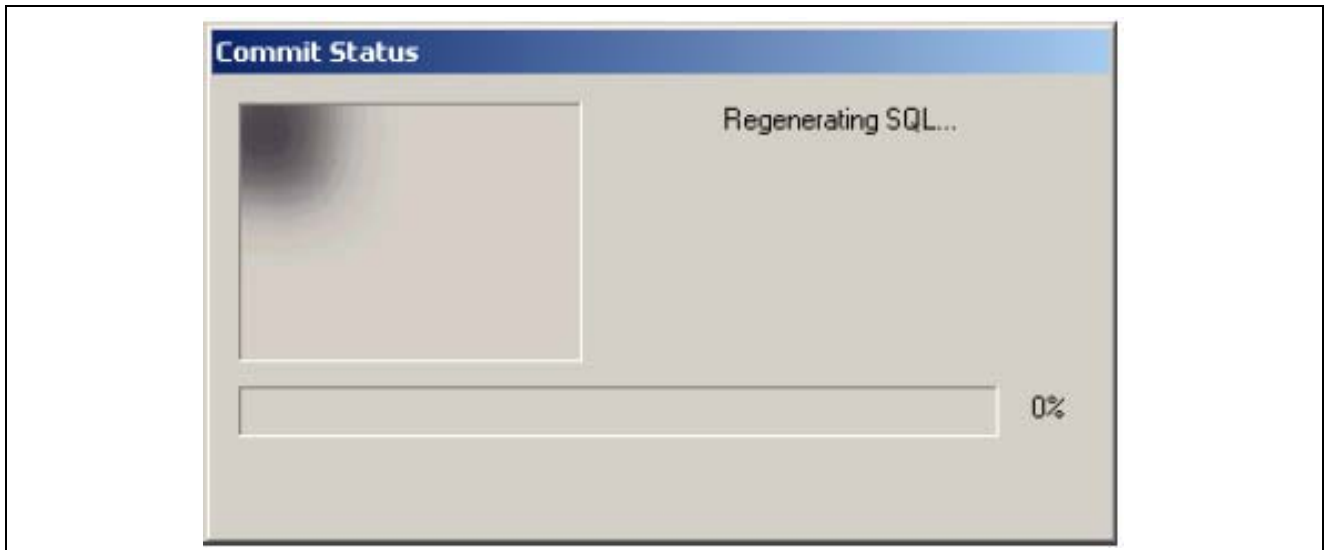
After the import process completes, the page status indicates that the operation is complete.



Import Wizard: Step 3 page showing that the import is complete and displaying the log files

11. Click the Finish button.

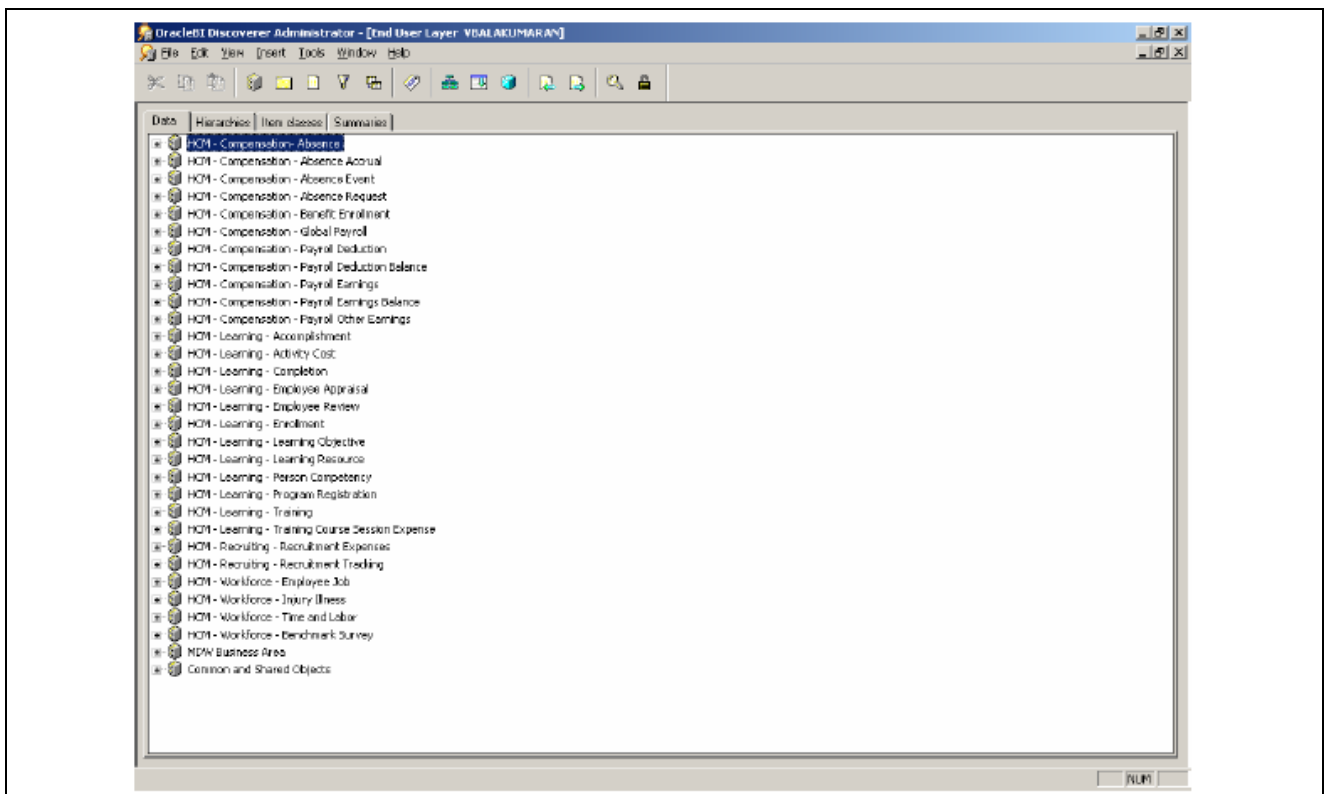
The Commit Status page appears.



Commit Status page displays the progress

12. After the Commit Status procedure completes, the definitions found in the .eex file now appear in the Oracle BI Discoverer Administrator page.

Refer to the following example that shows the Oracle Discoverer Administrator End User Layer files for VBALAKUMARAN:



Oracle Discoverer Administrator - End User Layer files

You have successfully completed the process of importing an .eex file to the Oracle Discoverer BI Administrator Tool.

---

## Task C-4: Granting Users Permission to Access Business Areas

You can grant Oracle Discoverer access permissions and task privileges to database roles, as well as to database users. When you grant access permissions or task privileges to a role, all users with that role have the access permissions and task privileges of that role. Regardless of the access permissions and task privileges that you set in the Oracle Discoverer Administrator, an Oracle Discoverer end user only sees folders if that user has been granted the SELECT privilege for the underlying base table that represents that folder in the EUL.

If you want the user to be able to create/modify/delete objects in the EUL, then in addition to the SELECT permission previously mentioned, the following should be granted:

INSERT, UPDATE, DELETE, SELECT privilege on all of the tables in EUL schema.

The best way to accomplish this is to create public synonyms for all PeopleSoft EPM objects that are used to build the Oracle Discoverer metadata and reports. Typically, these synonyms are created with the same name as the base object and the previously mentioned privileges are granted to the users.

For example, the following statements create public synonyms on PS\_D\_ACCOUNT (that is represented in the EUL as Dimension Account) and grant all privileges to users on the synonym.

```
CREATE PUBLIC SYNONYM PS_D_ACCOUNT FOR PS_D_ACCOUNT
GRANT SELECT, INSERT, UPDATE, DELETE ON PS_D_ACCOUNT TO user1
```

The steps previously described enable Oracle Discoverer users to access the base objects that are prerequisites for Oracle Discoverer users to access the business areas and execute reports.

You can control access to business areas in the following ways:

- By specifying the business areas that a particular user or role can access.
- By specifying the users or roles that can access a particular business area.

Access to Oracle Discoverer business areas and reports is provided by the Oracle Discoverer Administrator, and the necessary privileges are granted using the Oracle Discoverer Administrator Tool.

For more information, you can refer to the *Oracle Business Intelligence Discoverer Administration Guide*: Section 7, “Controlling Access to Information”.

---

## Task C-5: Installing Sun Java Plugin from Microsoft IE

When a user logs into the Oracle Discoverer Plus web site, a Sun Java Plugin component automatically downloads. You can select Yes to download and install the Sun Java Plugin that is required to access the reports.

For more information, you can refer to the *Oracle Business Intelligence Discoverer Desktop User's Guide*.

---

## Task C-6: Securing the Reports (Optional)

Refer to your PeopleSoft Enterprise Peoplebooks documentation for information on how to set up and configure the Oracle Discoverer security.

# Index

## A

- Angoss, installing 124
- Ascential DataStage 51
  - creating projects 54
  - installing on UNIX 43
  - installing on Windows 37
- Ascential MetaStage
  - configuring the host database 63
  - creating directory 63
  - installing 58
- audience vii

## C

- Customer Behavior Modeling, *See*  
PeopleSoft Customer Behavior Modeling

## D

- data mining tools, setting permissions 128
- DataStage, *See* Ascential DataStage

## E

- end user layer, creating for Oracle  
Discoverer 134
- EUI, *See* end user layer

## I

- installing clients 51

## O

- Oracle Business Intelligence tools,  
installing for Oracle Discoverer 134
- Oracle Discover
  - tables installed 134
- Oracle Discoverer
  - setting permissions 150

## P

- PeopleBooks, reference vii
- PeopleSoft Customer Behavior Modeling,  
using data mining tools 105
- PeopleSoft MetaBrokers 57
- permission
  - setting for Oracle Discoverer 150

- permissions, setting for data mining  
tools 128
- projects, Ascential DataStage 54

## S

- suggestions for documentation viii

