PEOPLESOFT ENTERPRISE FINANCIALS, ESA, AND SUPPLY CHAIN MANAGEMENT 9.0 SUPPLEMENTAL APPLICATION INSTALLATION INSTRUCTIONS

PeopleSoft Enterprise Financials, ESA, and Supply Chain Management 9.0 Supplemental Application Installation Instructions

Open Source Disclosure

Apache Software Foundation

OpenSSL

SSLeay

Loki Library

Helma Project

Sarissa

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PEOPLESOFT ENTERPRISE FINANCIALS, ESA, AND SUPPLY CHAIN MANAGEMENT 9.0 SUPPLEMENTAL APPLICATIONFIC INSTALLATION INSTRUCTIONS

This document provides supplemental installation instructions required for PeopleSoft Enterprise Financials (FMS), Enterprise Service Automation (ESA), Staffing Front Office (SFO),and Supply Chain Management (SCM) 9.0 applications.

This document supplements the *PeopleTools 9.0 Installation* guide for your platform. It is divided into three parts:

- Part I: Common Elements to Install FMS, ESA, SFO, and SCM Applications.
- Part II: Installing FMS, ESA and SFO Applications.
- Part III: Installing SCM Applications.

Part I: Common Elements to Install FMS, ESA, SFO, and SCM Applications

- Installing PeopleTools and creating your PeopleSoft Enterprise Financials/SCM Database.
- Configuring Application SQRs and COBOL for DB2 and the OS/390 Server.
- Setting Database Requirements to Run the ChartField Configuration Process
- Installing BPEL and Deploying BPEL Processes

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- Installing PeopleSoft Enterprise 9.0 Financials and ESA Portal Packs.
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- Installing PeopleSoft Enterprise Quality Application Client 9.0.
- Configuring eMail URLS in SCM Applications.
- Setting Up PeopleSoft Enterprise Supplier Contract Management 9.0.
- Setting Up SCM Pagelets.
- Granting Access to Navigation Pages in SCM.
- Accessing SCM Applications in the 9.0 Enterprise Portal.

Part I: Common Elements to Install FMS, ESA, SFO, and SCM Applications

CHAPTER 1

INSTALLING PEOPLETOOLS AND CREATING THE PEOPLESOFT ENTERPRISE FINANCIALS AND SUPPLY CHAIN MANAGEMENT DATABASE

This section provides prerequisite installation instructions required to create the Enterprise Financials and Supply Chain Management database.

Preinstallation Requirements

Before you install specific applications, you must install PeopleTools and create your Financials and SCM database. You must also set up the installation defaults and delete the summary trees from the SYSTEM database.

> **Note.** Unless otherwise noted, PT8.48 with minimum patch level 02 or higher is required at Install or Upgrade.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 1-1	Installing PeopleTools and Creating Your PeopleSoft Enterprise Financials/SCM Database

Task 1-1: Installing PeopleTools and Creating Your PeopleSoft Financials/SCM Database

For details, see the PeopleTools PeopleBooks: Installation and Administration Guide for your platform. Consult the chapter, "Creating a Database" to load the PeopleSoft Enterprise Financials, ESA and SCM System database.

PeopleTools Version

The PeopleSoft Enterprise FSCM 9.0 database requires the installation of PeopleTools 8.48 with a minimum patch level 02 or higher.

Note. You may encounter one or more SYSAUDIT exceptions in section PC-9A. These exceptions can be safely ignored.

For example:

PC-9A - Orphan App Pkg PeopleCode - Level 1:

Object Value# Object Value

----

1 COSTQUERY

2 CostQuery

3 OnExecute

4

5

1 Total Rows

FSCM 9.0 Demo Database Sizing Information by Platform

The following table lists the approximate FSCM 9.0 Demo database size for each platform.

Platform	Approximate Database Size
Oracle ANSI/Unicode	110.8 GB
DB2/Unix – ANSI	30.2 GB
DB2/Unix – Unicode	50.4 GB
DB2/OS390 – ANSI	22 GB

DB2/OS390 – Unicode	28.5 GB
Sybase – ANSI	17 GB
Informix	11.7 GB
Microsoft SQL Server – Unicode	12.3 GB
Microsoft SQL Server – ANSI	6.3 GB

Note. It is recommended that the Database Size Heap for the DB2/Unix platform *only*, should be increased to 20,000 (minimum) to avoid any temporary table failure during Demo database creation.

PeopleSoft Financials/SCM on Sybase

Important! PeopleSoft Financials/SCM requires a minimum 4K page size on Sybase.

EDM Pool Considerations

The PeopleSoft installation procedure places all tables for the product you are installing into multiple, physical DB2 for OS/390 databases using a shared table space methodology. Depending on the applications you are installing, the DB2 subsystem could have a minimum EDM Pool Size of 10 – 30 MB.

Set Up Installation Defaults Scripts for FSCM 9.0 System Database

Run the following script against the SYSTEM (SYS) database only for Financials/Supply Chain Management:

- **EPINSSYS.DMS – Installation Defaults:** This script establishes the installation defaults for the database. This only runs against the SYSTEM (SYS) database.

Delete Summary Trees Scripts for FSCM 9.0 System Database

Run the following script only against the SYSTEM (SYS) database only for Financials/Supply Chain Management:

- **EPCLNTRE.DMS - Tree Definitions:** This script deletes all of the summary trees from the database. This only runs against the SYSTEM (SYS) database.

CHAPTER 2

Configuring Application SQRs and COBOL for DB2 and the OS/390 Server

> **Note.** This section applies to Financials product customers using the DB2 OS/390 database platform who want to run SQR and COBOL processes on the OS390 Server that require reading of and/or writing to external files.

For both SQR and COBOL processing on the DB2 OS/390 server, standard JCL templates are provided used by the Process Scheduler to submit jobs in the OS/390 server. These shells accommodate basic input and output files determined by the program engines themselves, but for those SQR and COBOL processes that require special input and/or output files, additional modifications must be made to the JCL templates to accommodate these files.

PeopleSoft Enterprise General Ledger and PeopleSoft Enterprise Cash Management both contain several of these special files in certain SQR processes. In order to accommodate these files, data sets must be pre-allocated on the OS/390 file system as well as modifications that must be made to the JCL shells.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 2-1	Allocating Data Sets on the OS/390 File system
Task 2-2	Modifying the JCL Shells

Task 2-1: Allocating Data Sets on the OS/390 File System

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

The same JCL Shells are shared by all like processes, and an invalid file disposition can prevent all processes from executing successfully, not just the process that actually uses the file. For this reason we recommend using DISP=SHR in the JCL Shells, which will be discussed later. DISP=SHR presumes that the data set exists at the time a job execution is initiated. If the data set does not exist, a JCL error will occur. For a PDS, the individual member does not need to exist, only the root data set. If the member does not exist, it will automatically be created by the OS/390 file management system.

Partitioned data sets should be allocated including the following attributes:

- `The record` format should be variable block (RECFM=VB).
- The record length should be slightly wider than the record length of the file, as defined within the SQR itself. Refer to the table below for SQR LRECL definitions.
- The data set name type should be PDS (DSORG=PO).

Example of JCL statement to allocate a PDS:

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

The table below details the information that can be used to both pre-allocate the data set, and modify the JCL Shells for FMS in the next step.

PeopleSoft Enterprise Product	SQR or COBOL Program Name	DD Card Name (File name passed from within the program - limited to 8 characters with no special characters.)	Data Set Type / Record Format / Record Length	Member Name or Random name (Random name will use a member name of: A%INSTANCE%)
General Ledger	GLS7500	Defined and entered by the customer.	PDS/VB/850	Specific Member name (OUTPUT FILE)
Treasury	ECIN0001	Defined and entered by the customer.	PDS/VB/500	Specific Member name (OUTPUT FILE)

The table below details the information that can be used to both pre-allocate the data set and modify the JCL Shells for SCM in the next step.

PeopleSoft Inventory:

SQR or COBOL Program Name	DD Card Name (file name passed from within the program - limited to 8 characters with no special characters)	Data Set Type / Record Format / Record Length	Member Name or Random name (random name will use a member name of: A%INSTANCE%)
INS9050	INCOUNT	PDS/VB/250	Specific Member name (INPUT FILE)
INS9051	INCOUNT	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9080	INFCST	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9081	INFCST	PDS/VB/250	Specific Member name (INPUT FILE)

PeopleSoft Manufacturing:

SQR or COBOL Program Name	DD Card Name (file name passed from within the program - limited to 8 characters with no special characters)	Data Set Type / Record Format / Record Length	Member Name or Random name (random name will use a member name of: A%INSTANCE%)
SFS1100	SELPID	PDS/FB/183	Specific Member name (OUTPUT FILE)
SFS1600	SELPID	PDS/FB/183	Specific Member name (OUTPUT FILE)

Task 2-2: Modifying the JCL Shells

There are three shells delivered with PeopleSoft 8. One for COBOL: SHELCBL.JCT, and two for SQRs: SHELSQRF.JCT and SHELSQRP.JCT. The shells are located in the <PS_HOME>/appserv/prcs/shelljcl directory in Unix System Services.

For each file, for each program to be run with that JCL shell, the shell itself must be modified with the appropriate DD statement name, and corresponding data set name. For example, if there are 6 SQRs that reference a total of 10 special input or output files, and these SQRs use the SHELSQRF.JCT JCLshell, then 10 DD statement cards will need to be added to the appropriate section of the SHELSQRF.JCT file.

Below is an example of the edit required in JCL shell SHELSQRF.JCL to accommodate special files referred to as INSQR1 and INSQR2 in the SQR programs.

```
//*CTRANS   DD DSN=&SQRHLQ..LINKLIB,DISP=SHR
//SQRDIR   DD DSN=&SQRHLQ..ERRDAT,DISP=SHR
//SI       DD DSN=&PSHLQ..SQRINC,DISP=SHR
//SYSTERM  DD SYSOUT=*
//SYSOUT   DD SYSOUT=*
//DBGLOG   DD SYSOUT=*
//SYSTMPDB DD UNIT=WORK,SPACE=(TRK,25)  VS1 ONLY
//SP       DD DSN=&PSHLQ..SQRSRC(&SQRID),DISP=SHR
//*  ADD DD STATEMENTS HERE FOR LIBRARY CONCATENATION
//*
//SYSTERM  DD SYSOUT=*
//*
%SQROUT%
//*
//SQRPOST  DD DSN=&SQRHLQ..DAT(POSTSCRI),DISP=SHR
//SYSERR   DD SYSOUT=*
//SYSTSIN  DD DSN=&PSHLQ..PARMLIB(NOPARMS),DISP=SHR
//SYSIN    DD DSN=&PSHLQ..PARMLIB(&PRMID),DISP=SHR
//SQRINI   DD DSN=&PSHLQ..SQRSRC(PSSQRINI),DISP=SHR
//INSQR1   DD DSN=&PSHLQ..INSQRPDS(A%INSTANCE%),DISP=SHR
//INSQR2   DD DSN=&PSHLQ..INSQRPDS(INFILE),DISP=SHR
//        PEND
//*
//%PRCSNAME% EXEC SQRPROC,SQRID=%PRCSNAME%
//SYSTSIN  DD *
DSN SYSTEM(%DB2SUB%)
RUN PROG(SQR)  -
PLAN(SQRPLAN) -
LIB('SYS5.SQR614B1.SQR.UNICODE.LOAD') -
%SQRFLAGS%
END
//*
//SYSIN  DD *
%SQRPARMS%
/*
```

If you have already configured a Process Scheduler, the shells used by that configuration can be found in: `<PS_HOME>/appserv/prcs/<process scheduler name>/shelljcl`.

> **Note.** You must stop and restart the Process Scheduler in order for the edits in the JCL shells to take effect.

CHAPTER 3

Setting Database Requirements to Run the ChartField Configuration Process

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

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 3-1	Defining Settings for Various Databases to Run ChartField Configuration

Task 3-1: Defining Settings for Various Databases to Run ChartField Configuration

Recommended Settings for Oracle When Running ChartField Configuration

- Rollback or UNDO Tablespace = 1536MB.
- Rollback Segment sizing: Initial Extent + (Next Extent * Maxextents) = 1024MB (approximate).

- dml_locks = 1024 (set in init.ora).
- Changing the dml_locks setting requires recycling the instance.

Recommended Settings for Informix When Running ChartField Configuration

- Log Space = 2800MB.
- LOCKS = 2,500,000.

Recommended Settings for Sybase When Running ChartField Configuration

- Log Space = 2000MB.
- Tempdb = 5000MB.

Recommended Settings for DB2/Unix When Running ChartField Configuration

- Update the locking mode to share: **db2set DB2_RR_TO_RS = yes** (This sets Lock mode requested = Next Key Share (NS)).
- Include the following command in the DBMCFG.SQL configuration file: UPDATE DBM CFG USING QUERY_HEAP_SZ 64000.
- Log file size (4KB)   (LOGFILSIZ) = 24000
- Number of primary log files   (LOGPRIMARY) = 20
- Use the following minimum Tablespace sizes (these may need to be increased):
  - BDAPP: 9720
  - BDAPPIDX: 2680
  - BDLARGE: 1191
  - FAAPP: 11312
  - FSLARGEIDX   13568
  - LCAPP: 28572
  - LCAPPIDX: 2600
- Recycle the instance after changing the settings.

Recommended Setting for DB2/OS390 When Running ChartField Configuration

- No changes recommended.

Recommended Setting for MSS 2000 When Running ChartField Configuration

Log Space = 1500MB.

CHAPTER 4

INSTALLING BPEL AND DEPLOYING BPEL PROCESSES

This guide explains the steps necessary to configure the Oracle’s PeopleSoft/BPEL integration for PeopleSoft Enterprise Financials and Supply Chain Management (FSCM) 9 applications. You perform the steps in this guide after you have successfully completed installation of PeopleTools, as described in the Enterprise PeopleTools 8.48 Installation guide for your database platform, and the FSCM Applications.

Oracle’s PeopleSoft/BPEL integration involves two primary technologies: PeopleSoft Integration Broker and Oracle’s BPEL Process Manager. Both of these technologies must be configured. This guide covers a simple configuration of the PeopleSoft/BPEL integration.

It is possible to obtain the BPEL Process Manager (PM) from two different sources – JDeveloper Install and the Oracle OAS Middle-tier Install (version 10.1.2.0.2). The JDeveloper BPEL PM is used more for development and unit testing but can also be used for a simple environment with minimum workload.

The PeopleSoft Integration Broker configuration can be complex. In a production environment for example, it is recommended that you separate the service operation requests on a dedicated PeopleSoft environment (accessing the same database so that interactions by users through PIA do not impact the performance of service operation fulfillment). However, for a simple environment, it is possible to have the Integration Broker application services share the PIA application servers.

Task Overview

The following tasks detail the process for installing and configuring Oracle's BPEL Process Manager.

Task No.	Task Name
Task 4-1	Selecting and Installing the Software
Task 4-2	Applying Patches
Task 4-3	Configuring and Tuning BPEL Process Manager
Task 4-4	Restarting the Instance

Task 4-5	Recording Access Information
Task 4-6	Creating and Configuring a BPEL Domain
Task 4-7	Configuring PeopleSoft for BPEL Integration
Task 4-8	Deploying FSCM BPEL Processes

Task 4-1: Selecting and Installing the Software

The BPEL Process Manager (PM) is found as part of two different products: Part of the 10.1.2.0.2 JDeveloper installation or the Oracle Middle Tier OAS installation (10.1.2.0.2). JDeveloper is for simple testing and BPEL Development while the middle-tier should be used for a production environment. The BPEL PM found with JDeveloper can be used for simple environments with minimal workload. For any other environment, it is recommended that the OAS Middle-tier be used. The JDeveloper's BPEL PM is available with minimal setup requirements while the OAS Middle-tier requires additional planning for installation. The software is available on Oracle's Software Site – http://otn.oracle.com/bpel.

Please review the installation documentation for your selected software and perform the installation of the software as per the corresponding installation guide.

Your PeopleTools 8.48 license grants you a design time use license of the Oracle BPEL Process Manager 10.1.2.0.2 for OC4J. The Oracle BPEL Process Manager is a standards-based process orchestration and integration solution that provides the foundation for developing and deploying services-oriented and web service-enabled integrations. The Oracle BPEL Process Manager provides native support for BPEL 1.1 in combination with broad web service standard support to ensure interoperability with other BPEL and Web Service compliant solutions.

The developer version of Oracle BPEL Process Manager 10.1.2.0.2 for OC4J is the BPEL engine that is referenced in this chapter. The Oracle BPEL Process Manager Developer Edition provides restricted design time use. Runtime use requires purchase of BPEL Process Manager 10.1.2.0.2. It is recommended that you check your Oracle PeopleSoft license agreements to see if you are licensed to use Oracle BPEL Process Manager for runtime purposes. If you are licensed to use this product, you may download it from the Oracle web site.

While installing the BPEL Process Manager environment and the PeopleSoft Enterprise environment, please make sure to note the installation directories you selected for the install. Throughout the remainder of this chapter, the BPEL PM installation directory is referred to as *<BPEL_PM_HOME>* and the PeopleSoft Enterprise installation directory is referred to as *<PSHOME>*.

Note. If you are running the BPEL PM in an environment which requires proxy servers, please make sure that you have followed the instructions for configuring your BPEL PM (and supporting command line environments) for a proxy environment.

See Also: *Enterprise PeopleTools 8.48 PeopleBook:* PeopleSoft Integration Broker

Enterprise PeopleTools 8.48 Installation for <your database platform>

Oracle Application Server Integration Installation Guide for Oracle BPEL Process Manger

Task 4-2: Applying Patches

While the Oracle Middle Tier OAS installation (10.1.2.0.2) and/or Jdeveloper (10.1.2.0.2) provide the core functionality necessary to integrate BPEL with the Oracle's PeopleSoft system, additional patches, if any, must be installed.

BPEL integration patches (whether specific to BPEL Process Manager or Oracle's PeopleSoft BPEL integration) are available via Customer Connection. It is actually recommended that all available patches be applied prior to the deployment of the PeopleSoft BPEL processes.

Task 4-3: Configuring and Tuning BPEL Process Manager

This task primarily involves the BPEL PM found as part of the Oracle OAS Middle-tier product. The middle-tier requires special configuration needs. These are extensive and not covered here.

> See Oracle Application Server Integration Installation Guide for Oracle BPEL Process Manager.

This section discusses:

- Adjusting the JTA Transaction Timeout.
- Tuning the JVM.

Adjusting the JTA Transaction Timeout

The BPEL engine uses JTA to achieve the atomicity. By default the transaction timeout value is set to 60000 milliseconds in the server.xml file (30000 milliseconds in the app server). For the developer edition, this is located at
<BPEL_PM_HOME>/integration/orabepl/system/appserver/oc4j/j2ee/home/config/server.xml.

Sometimes users may experience transaction rollback error due to timeouts, especially when the BPEL engine is under stress. The timeout can happen for many reasons.

- Insufficient resources: not enough database connections in connection pool, engine thread waits for 60 seconds and throws timeout error, etc.
- Large document manipulation: Database writes of very large documents may take longer than 60 seconds.

The line in the server.xml file appears as follows: `<transaction-config timeout="60000" />`

A value of '300000' milliseconds is recommended.

> **Note.** The remaining steps of the Task 4-3 are primarily for the Middle-Tier environment. If you are using the JDeveloper BPEL PM, you may skip to Task 4-4.

Tuning the JVM

The heap size controls how much memory the JVM can use. The initial value is 256 megabytes. The -XX:+AggressiveHeap option inspects the machine resources (size of memory and number of processors) and attempts to set various parameters to be optimal for long-running, memory allocation-intensive jobs.

The garbage collector optimizes collection by classifying objects by how long they live. Most of the BPEL engine's objects are short lived, thus they live in the "Eden" space. We recommend sizing the "Eden" space to be 60 to 70 percent of the total heap size. Here are the JVM command line options used: -Xms1024m -Xmx1024m -Xmn614m -XX:+AggressiveHeap

To change the Java command line options for an OC4J Instance, go to the OC4J instance homepage and perform the following steps:

1. Stop the OC4J Instance.

2. Drill down to the Server Properties page.

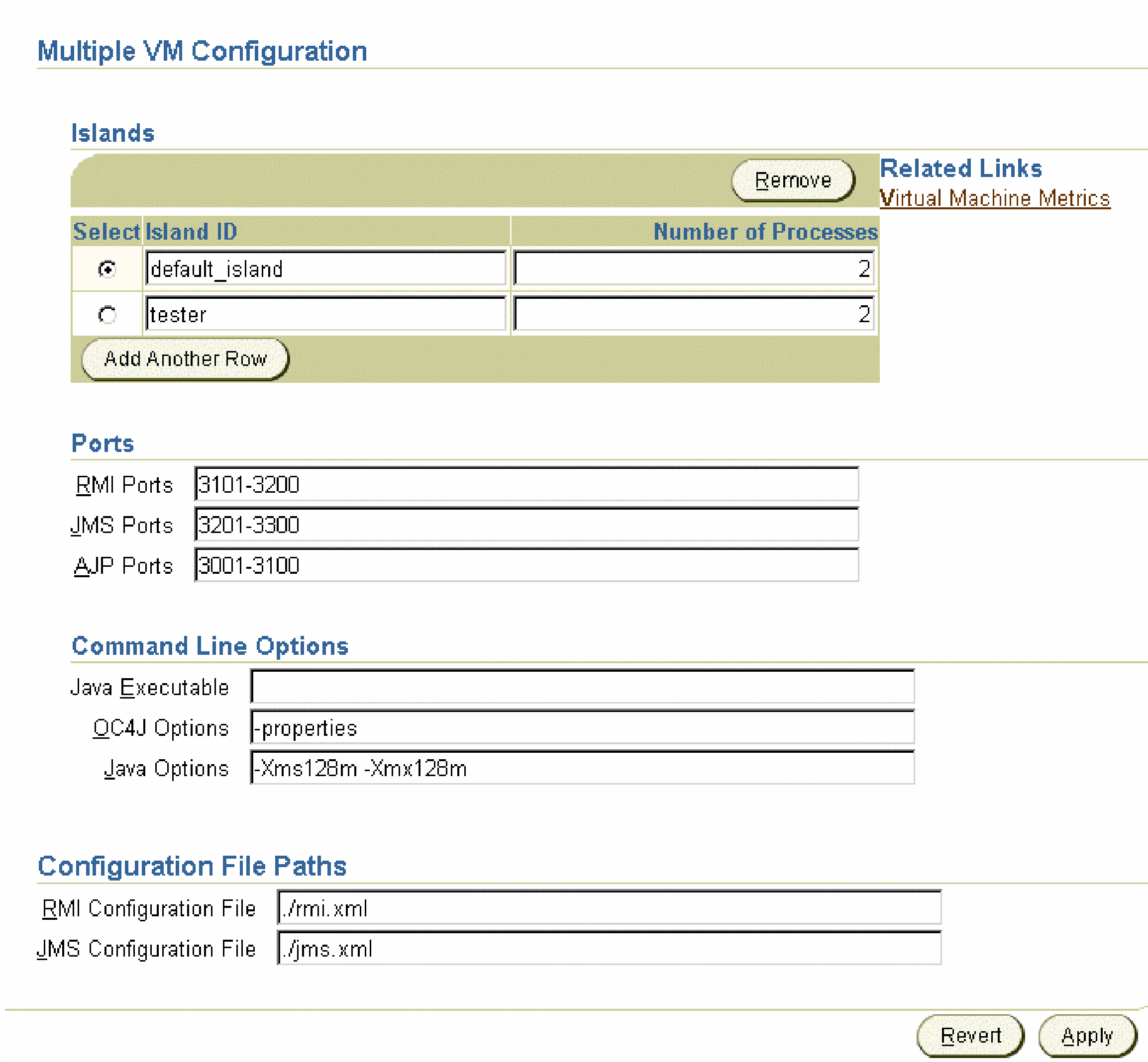
3. In the Command Line Options area of the Server Properties page, under the heading Multiple VM Configuration, set the Java Options.

   For example, enter the following to set the JVM initial and maximum heap sizes to 2048 megabytes; and for garbage collection, set the eden space to 60% of heap size: `-Xms2048m -Xmx2048m -Xmn1228m`

4. If using 2 or more than 2 CPUs, please -XX:+AggressiveHeap jvm flag adjacent to the above command.

5. Click the Apply button to apply the changes.

6. Start the OC4J Instance.



Setting Java Heap Size for an OC4J Instance Using Application Server Control

You should set your maximum Java heap size so that the total memory consumed by all of the JVMs running on the system does not exceed the memory capacity of your system. If you select a value for the Java heap size that is too large for your hardware configuration, one or more of the OC4J processes within the OC4J Instance may not start, and Oracle Enterprise Manager Application Server Control reports an error. Review the log files for the OC4J Instance in the directory <BPEL_PM_HOME>/opmn/logs, to find the error report, *Could not reserve enough space for object heap*.

Task 4-4: Restarting the Instance

At this point, rebooting the machine or restarting the middle-tier instance is required in order for all configuration settings to take effect. Please see the OAS Middle-tier documentation on how to perform this operation.

If the JDeveloper's BPEL PM is used, merely stopping and restarting the BPEL Process Manager is all that is required. For example on a Microsoft environment, select Start→Programs→<your installation name given at install time>→ Oracle BPEL Process Manager 10.1.2→ Stop BPEL PM Server (waiting for the BPEL PM to shutdown) followed by Start→Programs→<your installation name given at install time>→Oracle BPEL Process Manager 10.1.2→Start BPEL PM Server.

Please make sure your BPEL PM has completed its initialization prior to starting the next steps.

Task 4-5: Recording Access Information

At this point, please note the host and port information used to access your BPEL PM. This information is used later when configuring the BPEL processes for deployment. The host and port information is the same as that used when accessing the BPEL Console. For example, the default URL for accessing the BPEL Console from a JDeveloper installation is as follows:

http://yourhostname:9700/BPELConsole

Where the hostname is "yourhostname" and the port is "9700." For the Jdeveloper BPEL PM, the port used is always 9700; however, the port used by the middle-tier product is configurable.

Task 4-6: Creating and Configuring a BPEL Domain

This step involves creating a BPEL domain to which the FSCM BPEL processes will be deployed. It is possible to use the "default" domain (which is delivered with the BPEL PM installation), however, it is recommended that a new BPEL domain be created for this installation.

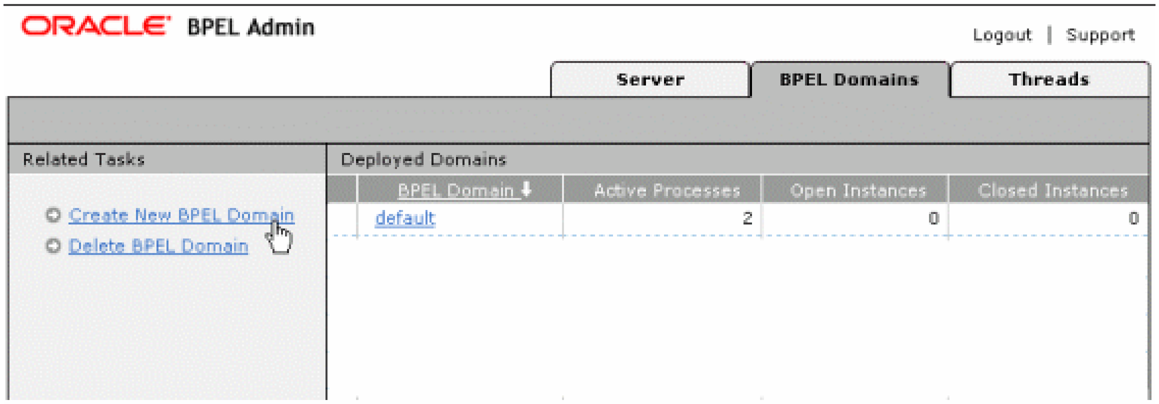
Note. At this point, the BPEL PM must be available in order perform the following steps. The BPEL PM must be started prior to creating the BPEL domain and remain available throughout the BPEL deployment process.

This section discusses:

- Creating a New BPEL Domain.
- Setting the Domain's auditLevel.

Creating a New BPEL Domain

Through the BPEL Administrator console (http://yourhostname:port/BPELAdmin) , select the BPEL Domains tab and select Create New BPEL Domain.



BPEL Admin — BPEL Domains page

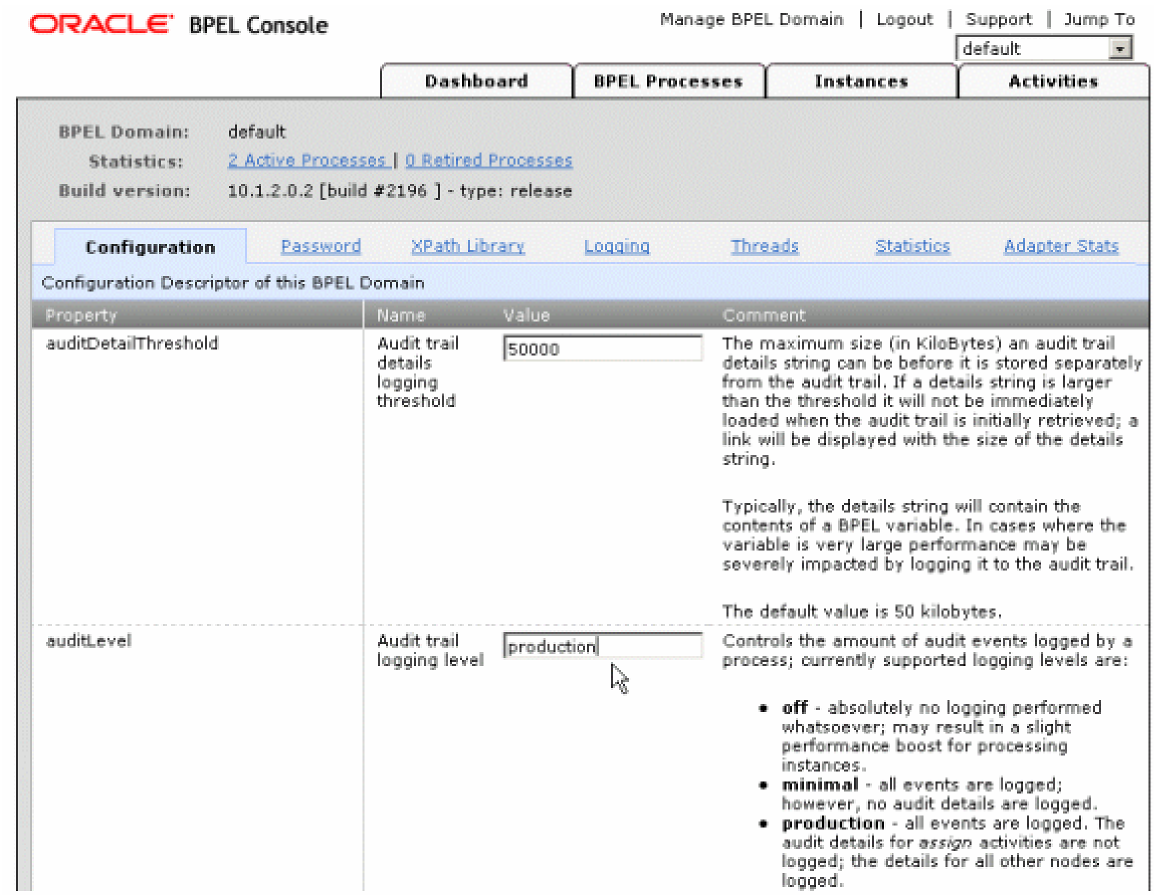
Create an installation domain and note both the Domain ID and the password that you specify (these values are used later in the PeopleSoft configuration). Use the default values populated in the other fields on the "Create New BPEL Domain" form. Once you select the **Create** button, a popup window appears asking for confirmation of data. Select the **OK** button to confirm and wait for the window indicating that the creation of the new domain is complete.

Note. If you cannot connect to the BPEL Administrator console, the most likely cause is the BPEL Process Manager has not been started. Please make sure that the BPEL Process Manager is available throughout the installation process.

Setting the Domain's auditLevel

This property controls the number of audit events logged by a process. It greatly impacts the performance due to the additional auditing events inserted into the database for a process. This audit information is only for view purpose from BPEL Console to show the state of the process. This configuration property's default value is *development.* It should be changed to *production.* With this value, all events are logged. The audit details for <assign> activities alone are not logged.

To perform this operation, log into the domain via the BPEL Console (http://yourhostname:port/BPELConsole) and select the **Manage BPEL Domain** hyperlink at the top of the page. On the Configuration tab, edit the **auditLevel** property and set to *production.* Click **Apply** to activate the settings.



BPEL Console — Configuration page

Task 4-7: Configuring PeopleSoft for BPEL Integration

While not a requirement for a simple environment, it is recommended that a special application/web server environment be configured as a dedicated environment for providing FSCM services. This ensures that user interaction with the PIA environment does not affect the performance of the service operations. However, for simple environments, it is acceptable to use the default local Integration Broker Gateway and the application servers used by the PIA.

> **Note.** The remainder of the installation steps requires the PIA environment to be available. Administrators must be able to log into the environment in order to configure the PeopleSoft Integration Broker. Also, the deployment process performed on the BPEL PM requires access to the PeopleSoft service details which are accessed via the PeopleSoft Integration Broker. Please make sure that the PeopleSoft environment is completely available throughout the remainder of the installation.

This section discusses:

- Configuring Special PeopleSoft Server Environment.

- Configuring Integration Broker Gateway.
- Confirming Access to Integration Broker.
- Configuring Enterprise Service Setting.
- Configuring the "BPEL" Node.
- Activating Web Services.
- Verifying Simple Access to Integration Broker.

Configuring Special PeopleSoft Server Environment

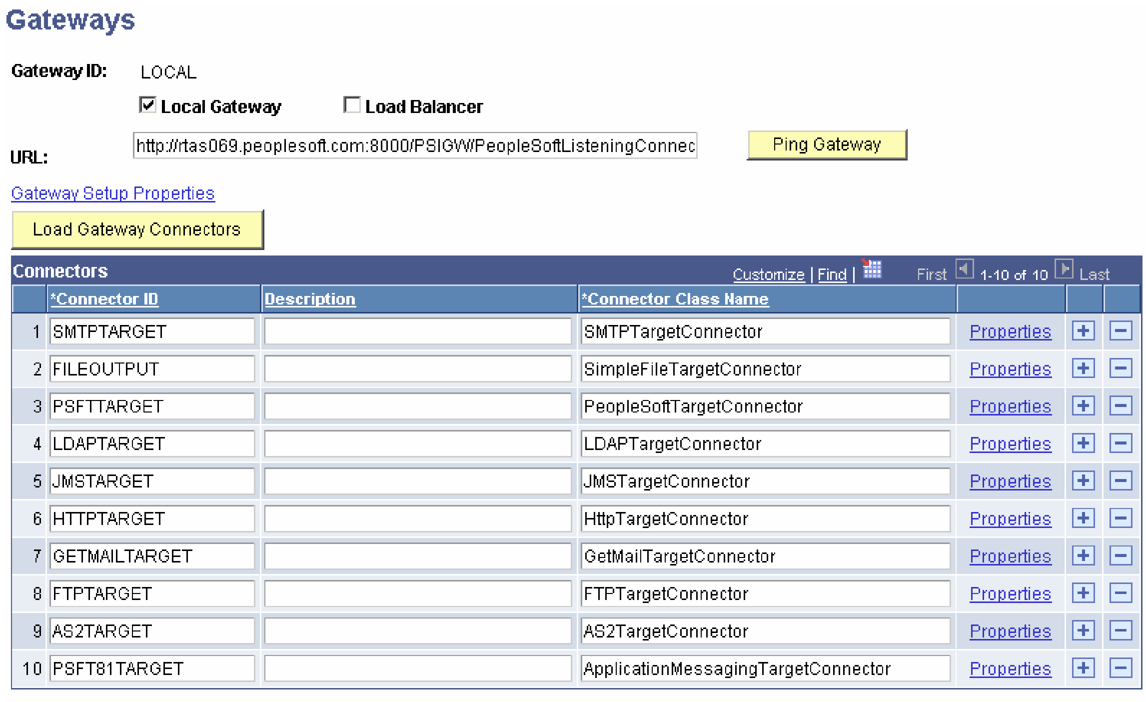
In this step, we configure a special server (web and application server) environment to provide PeopleSoft services.

> **Note.** This step can be skipped if the existing PeopleSoft environment used by the PIA users is to be used by service operations.
>
> See Also: *Enterprise PeopleTools 8.48 PeopleBook:* PeopleSoft Integration Broker

Configuring Integration Broker Gateway

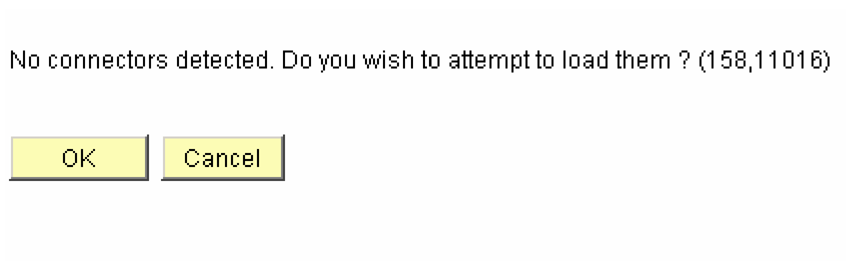
To configure the default gateway, navigate to PeopleTools → Integration Broker → Configuration → Gateways.

If you are using single application server environment, confirm the Local gateway URL for proper configuration - http://yourhostname:port/PSIGW/PeopleSoftListeningConnector.



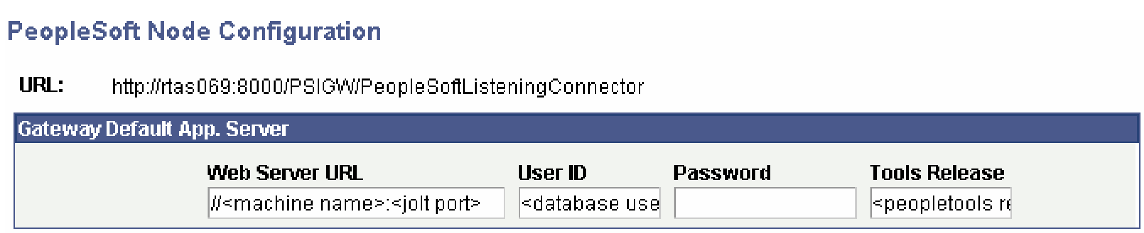
Gateways page

Save the changes. On save, the system displays the following message: *No connectors detected. Do you wish to attempt to load them?* Accept the message.



No Connectors Detected message

At that point, go to the Gateway Setup Properties (follow the instructions on the page to log in) and configure the default application server for the application server you are using:



PeopleSoft Node Configuration page

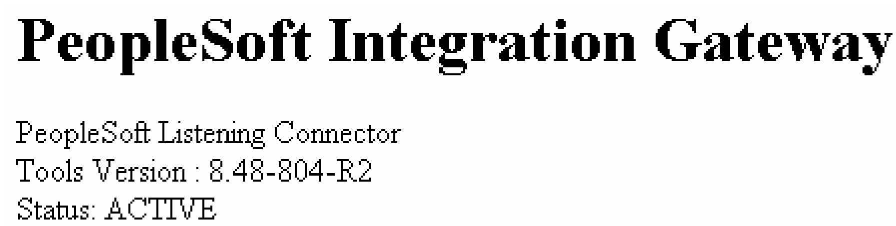
See the PeopleSoft guide for configuring the Integration Broker on how to set up a gateway.

Confirming Access to Integration Broker

Once the environment is configured, you should be able to "ping" the Integration Broker gateway by using the host/port information for the environments application server. From a browser, you should be able to type the following type of URL:

http://yourhostname:port/PSIGW/PeopleSoftListeningConnector

If you see the following output in the browser, the Integration Broker is available for further configuration.



PeopleSoft Integration Gateway Status

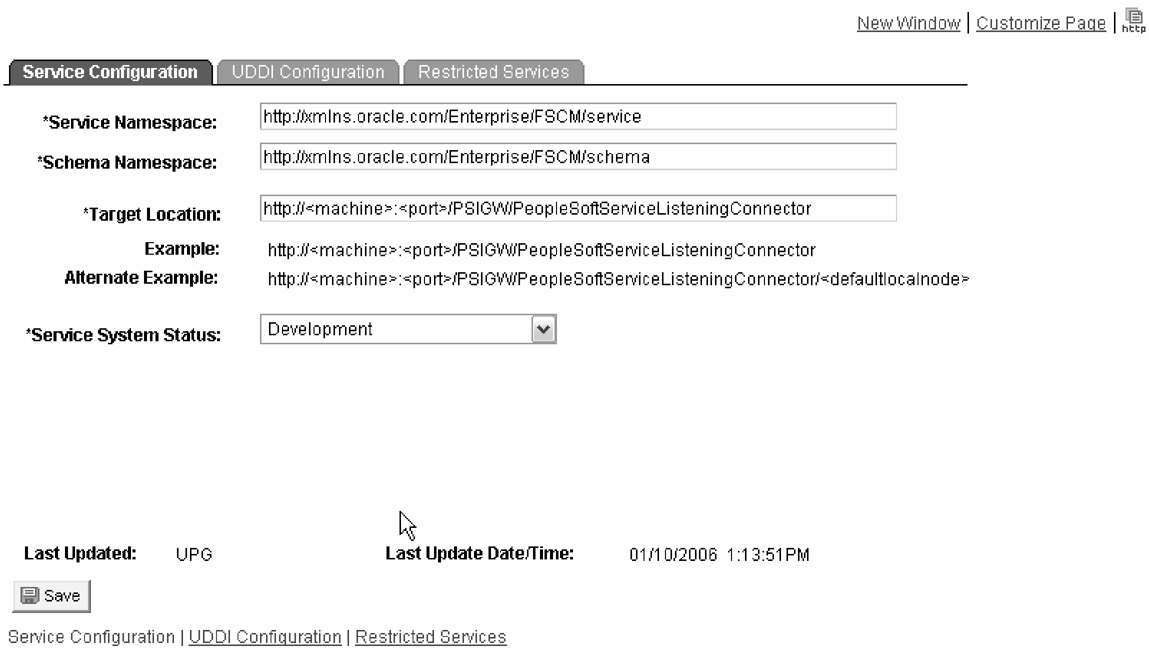
> **Note.** Please remember the hostname and port information for your Integration Broker, as it will be used later to configure the BPEL processes for deployment.

Configuring Enterprise Service Setting

In this step, the default service configurations are changed by navigating to PeopleTools → Integration Broker → Configuration → Service Configuration. On this page, change the following:

- Service Namespace to "http://xmlns.oracle.com/Enterprise/FSCM/service"
- Schema Namespace to "http://xmlns.oracle.com/Enterprise/FSCM/schema"
- Target Location to http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector

> **Note.** If the gateway services multiple application databases, the service URLs will need to include the corresponding nodes to be used in order to process the services. The target location should include the node here before providing services.



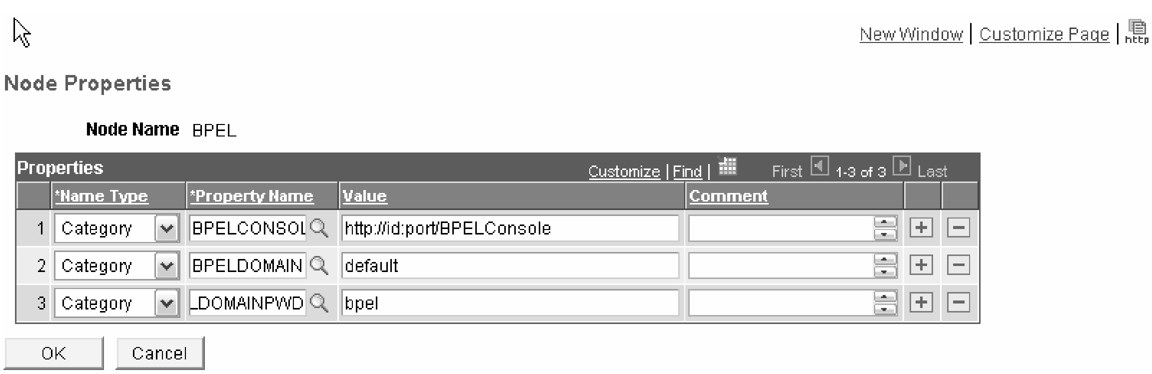
Service Configuration page

> **Note.** The Target Location URL uses "PeopleSoftServiceListeningConnector" contrary to the "PeopleSoftListeningConnector" which was used as part of the Integration Broker Setup.

Configuring the "BPEL" Node

The Integration Broker node, called "BPEL," is used to communicate to the BPEL engine and must be configured properly to point to the BPEL PM. To do this, navigate to PeopleTools→Integration Broker→Integration Setup→Nodes and open the "BPEL" node. Once on that page, select the **Properties** hyperlink. On that page, enter the following information:

- BPEL Console URL (used earlier to configure the domain)
- BPEL Domain (target deployment domain)
- BPEL Domain Password



Node Properties page

Activating Web Services

Understanding Web Service Activation

This section involves activating the required web services to support the BPEL process deployment and runtime operations. There are three categories of web services that must be activated for the complete BPEL integration: PeopleTools, BPEL Infrastructure, and application-specific. Activation of PeopleTools and BPEL Infrastructure web services must be performed during this installation step; however, application-specific web service activation can be deferred.

Please use the following steps to activate the web services mentioned below:

1. Navigate to PeopleTools→Integration Broker→Integration Setup→Service Operations. Enter the service operation you wish to activate in the Service Operation field and press Search. Select the service operation from the results area.

2. On the General page that appears, select the **Active** field.

   > **Note.** For asynchronous operations, please remember the queue(s) found in the Message Information section, so that these queues can be placed in a Running state in a later step.

3. On the Handlers page, make sure that any handler listed is set to *active*.

4. On the Routings page, make sure that the listed routing is active (if multiple routings exist, only one should be active). If the routing for the service operation does not have a status of *Active*, select the routing to be activated (use the first routing if multiple routings exist) and press the **Activate Selected Routings** button.

5. Select **Save** to store your changes.

6. (For asynchronous service operations only) Navigate to PeopleTools→Integration Broker→Service Operations Monitor→Administration→Queue Status. On the Queue Status page, make sure that the queue that the service operation uses is in *Running* status. If the queue is not running, press the corresponding **Run** button.

   As mentioned earlier, you can find the name of the queue that an asynchronous service operation uses on the General page for that service operation.

> **Note.** As a reminder, please make sure that the handlers and routings are activated for the service operations. Activating the service operation does not automatically activate the corresponding handlers or routings. Also, if an operation, handler, routing or queue is already active, no action is required for that item.

Confirming PeopleTools Web Service Availability

For basic BPEL process deployment and typical BPEL process operations, the following PeopleTools Service Operations (and their corresponding routings) must be activated:

- GETROUTINGS

- GETSCHEMA
- GETWSDL
- GETWSIL
- GETXSLT
- SAVEXSLT

The following corresponding Integration Broker Queues should also be in a *Running* state:

- IB_CHNL
- IB_GENERIC
- WSDL_QUEUE

To verify whether a queue is running:

- Navigate to PeopleTools→Integration Broker→Service Operations Monitor→Queue Status.
- Click the **Find** link in the **Queues** grid.
- Enter the *Queue Name* in the Search Box and click on OK button.
- Make sure that the **Status** column shows the status as *Running* for that Queue. If it is *Paused,* click the **Run** button, next to the Status.

Activating Application-Specific Web Services

Now, the web services for your particular application(s) can be activated. This is a product specific task, so refer to the product specific documentation for setting up the services.

The following is a list of the FSCM web services that can be deployed to integrate with BPEL:

Application	Services
Treasury	FINANCIAL_GATEWAY
Accounts Payable	MPA_OAG_INVOICE
	MPA_SELF_SERVICE_INVOICE
	AP_VOUCHER_BUILD
	AP_INVOICE_STATUS
	FS_SDN_SEARCH
Time and Expense	TV_RESERVATION

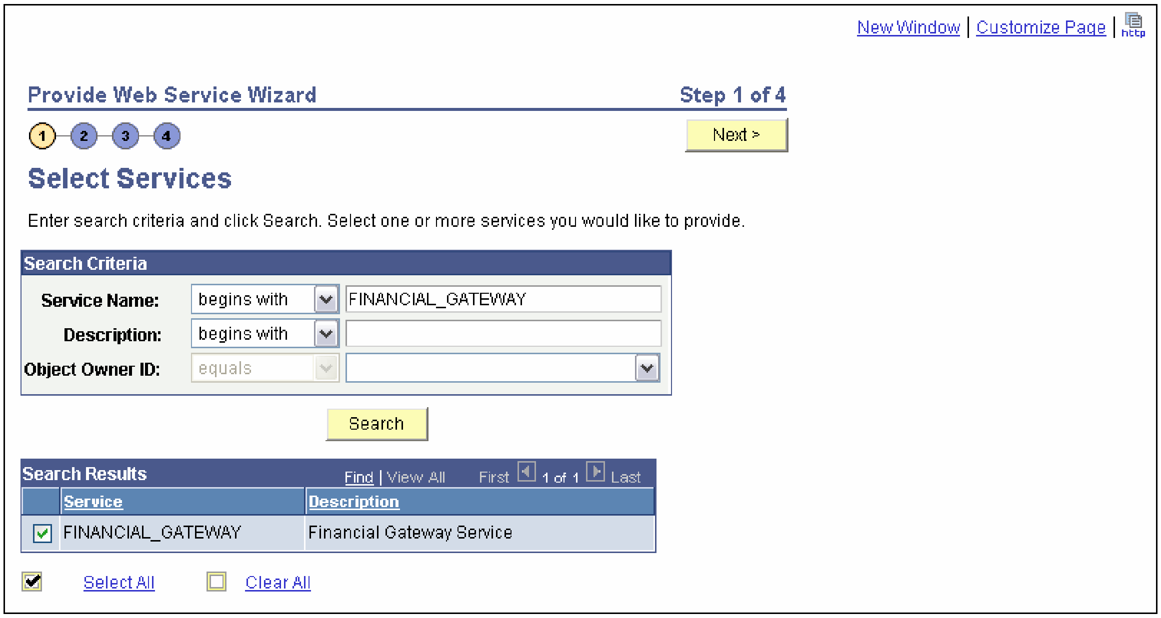
Providing Application-Specific Web Services

In order to provide the services, navigate to the Provide Web Service page. The Provide Web Service page is located at the following path: PeopleTools → Integration Broker → Web Services → Provide Web

Service. From this page, search for the Services listed in the table above and follow the instructions to provide the services and generate the appropriate WSDL file for those services.

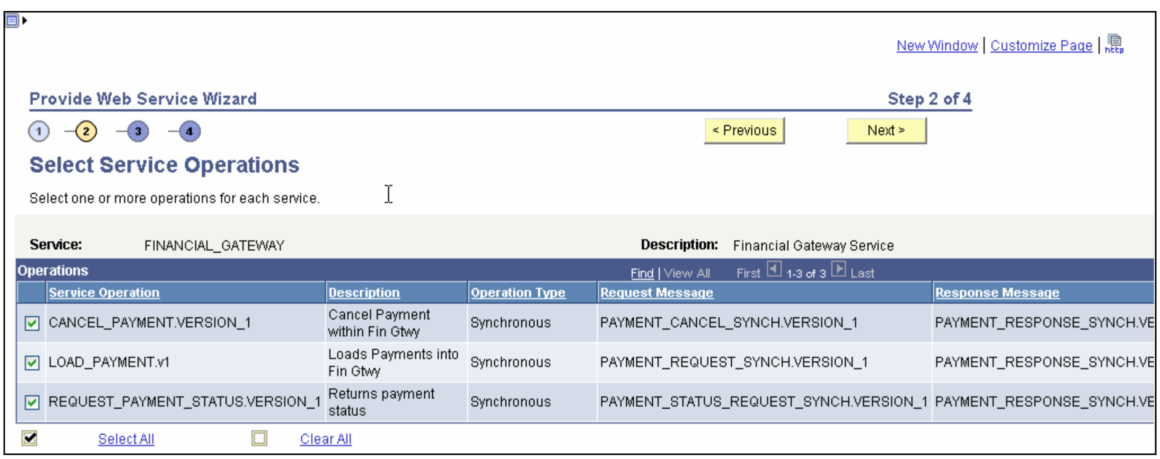
Please use the following steps to provide application-specific web services:

1. Navigate to PeopleTools, Integration Broker, Web Services, Provide Web Services. Enter <service_name> (for example, *FINANCIAL_GATEWAY)* for the service name and click **Search.** Then, click the **Next** button.



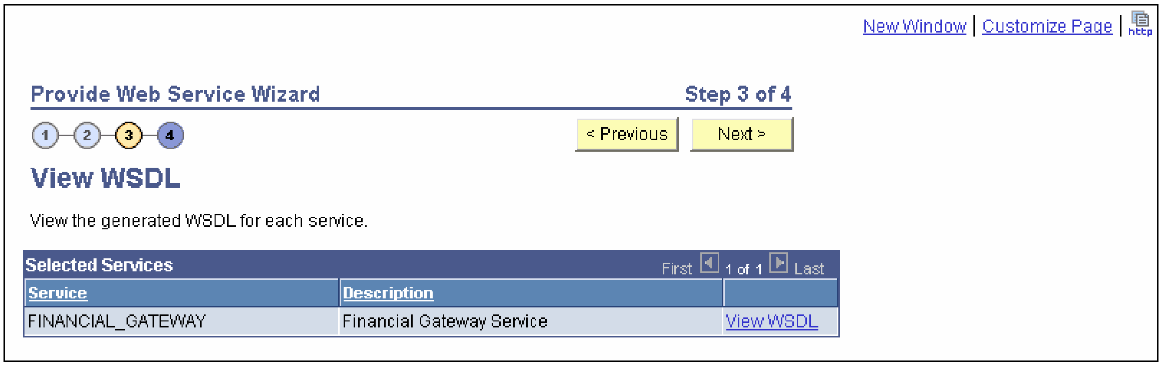
Provide Web Service Wizard – Select Services page

2. Select all Service operations and click the **Next** button.



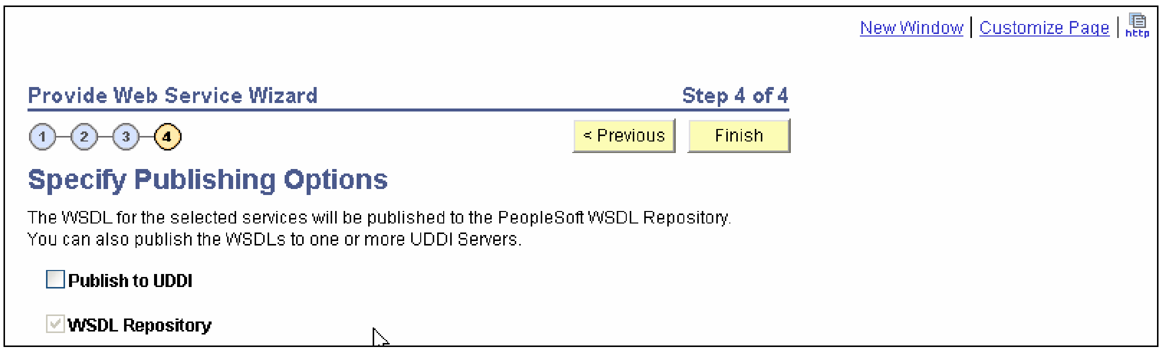
Provide Web Service Wizard – Select Service Operations page

3. Review the new WSDL as necessary and click the **Next** button to publish the WSDL.



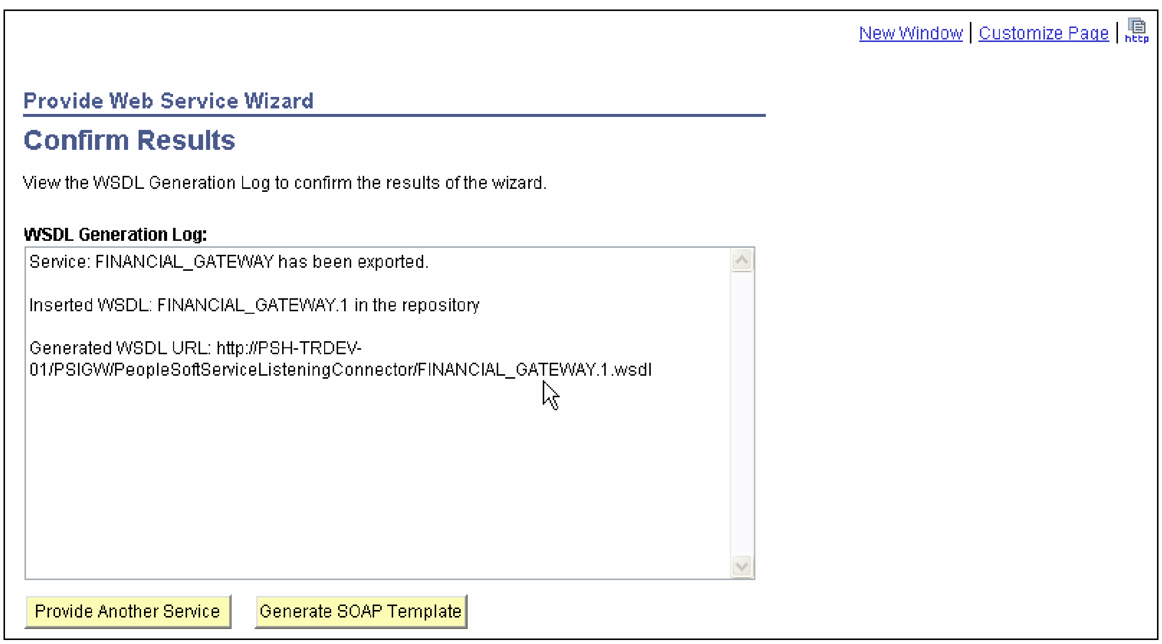
Provide Web Service Wizard – View WSDL page

4. Click the **Finish** button to publish the new WSDL into the PeopleSoft WSDL Repository.



Provide Web Service Wizard – Specify Publishing Options page

5. Generate the SOAP template by clicking the **Generate SOAP Template** button.



Provide Web Service Wizard – Confirm Results page

Verifying Simple Access to Integration Broker

Once the PeopleSoft environment has been restarted, a simple test to access a service's WSDL (Web Service Definition Language) can be performed to see if the basic information required by the BPEL deployment tasks are available. From a web browser on the BPEL PM machine, type in the following URL address:

http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector/FINANCIAL_GATEWAY.1.wsdl

The result should display an XML document with the top level tag element being *<wsdl:definitions>*. Any other result means that the PeopleSoft system is not correctly configured. Validate that your Integration Broker settings are correct and that all components of the PeopleSoft system (application servers and webservers) are available.

Task 4-8: Deploying FSCM BPEL Processes

This section discusses the actual initial deployment of all PeopleSoft FSCM BPEL processes onto the BPEL PM.

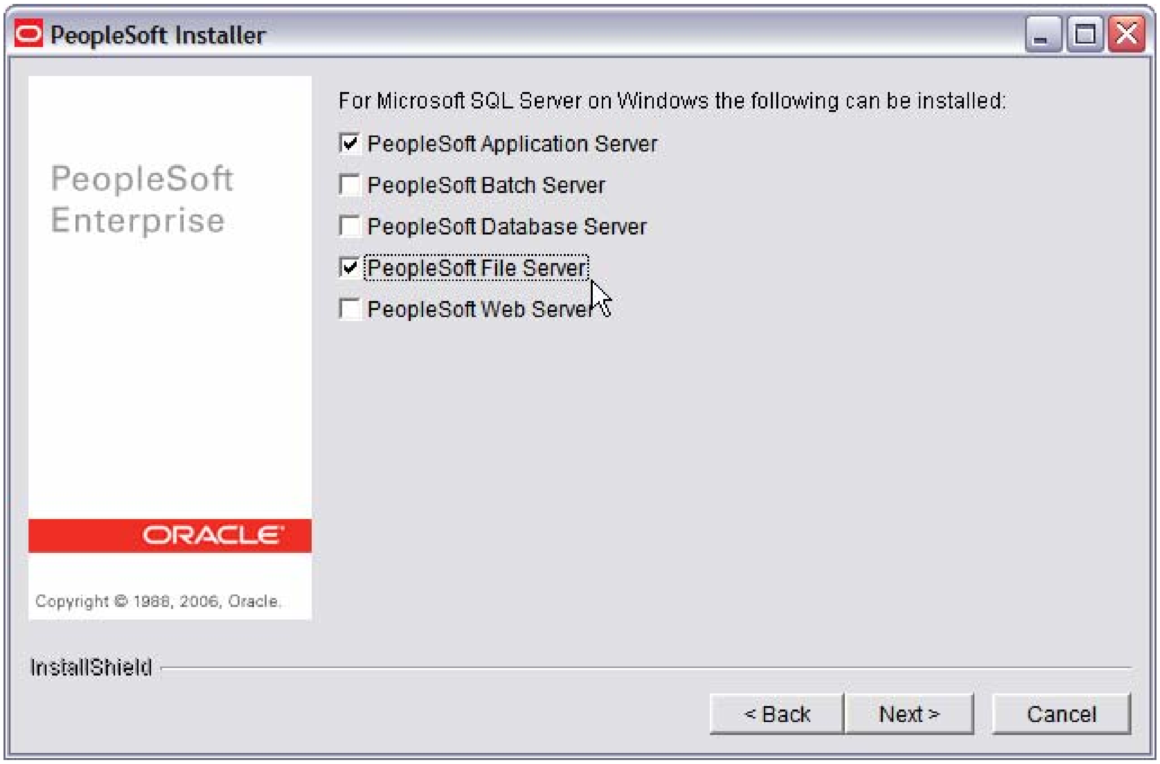
> **Note.** This step cannot be completed until all previous tasks have been completed and BOTH the BPEL PM and PeopleSoft Integration Broker are available.

This section discusses:

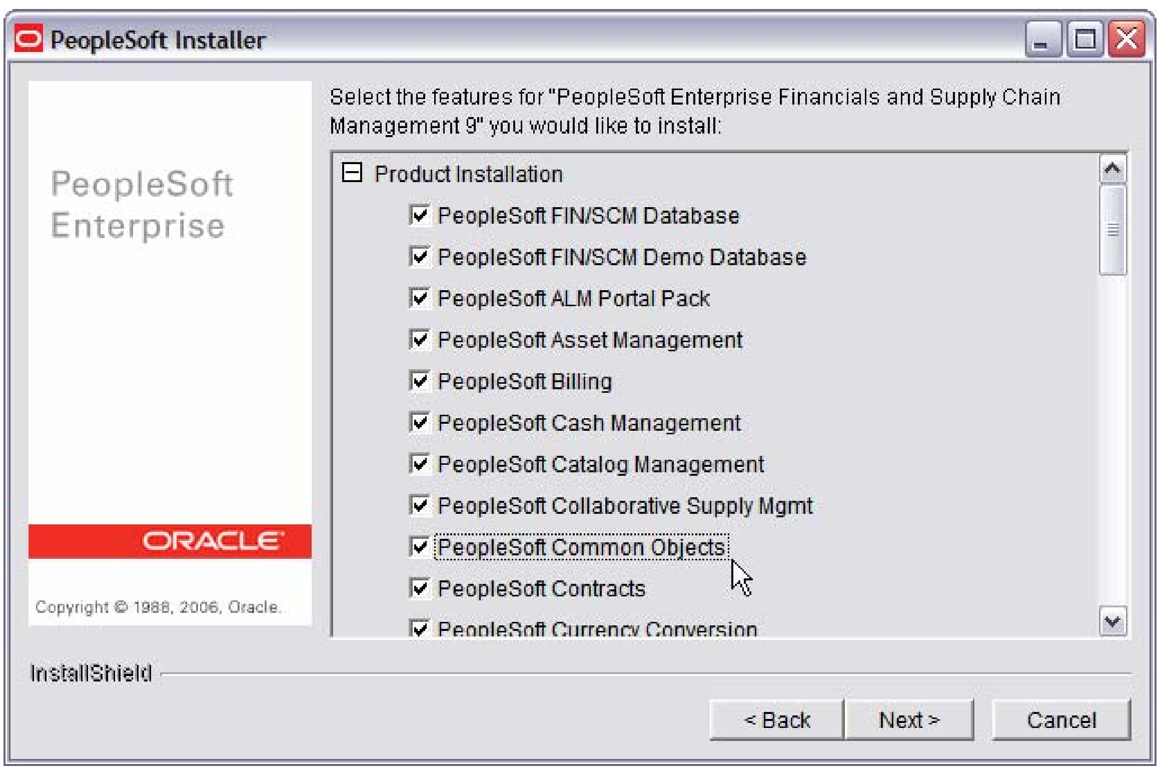
- Copying BPEL Process Files
- Configuring BPEL Process Files for Deployment
- Deploying All BPEL Processes

Copying BPEL Process Files

Under the PeopleSoft Enterprise installation directory (PSHOME), there should be a directory called “bpel”. The “bpel” directory is created during the PeopleSoft installation when the following installation options are selected: PeopleSoft File Server and PeopleSoft Common Object. The following screenshots show these two options selected:



PeopleSoft Installer: The PeopleSoft File Server option must be selected



PeopleSoft Installer: The PeopleSoft Common Objects option must be selected

The “bpel” directory contains the BPEL process source files as well as supporting files to be used to deploy the BPEL processes are your target BPEL PM machine. These files need to be copied over to the BPEL PM. On your BPEL PM machine, create a new directory in <BPEL_PM_HOME>/integration/orabpel named “peoplesoft”. Now, copy the contents if the <PSHOME>/bpel directory over to the <BPEL_PM_HOME>/integration/orabpel/peoplesoft directory on your target BPEL PM machine. Once the copy is completed, the *contents* of the “peoplesoft” directory should be the same as that of the “bpel” directory.

The remainder of the steps in this section are performed on the BPEL PM machine.

Configuring BPEL Process Files for Deployment

Edit install.properties

This step involves editing a file called “install.properties” located in <BPEL_PM_HOME>/integration/orabpel/peoplesoft. This file is used to create a set of deployable files for the environment you have created. The delivered file appears as follows:

```
install.ps-host=<Integration Broker Host>
install.ps-node=<node to be used to process web services>
install.bpel-host=<your bpelpm machine>
install.bpel-port=80
install.bpel-domain=default
```

The following must be specified:

- install.ps-host: This is the hostname and port (if specified) used to access the PeopleSoft Integration Broker.
- install.ps-node: If you are using an application server that is not the default application server of the gateway, then you must specify the node for whichever application server is to perform the processes.
- install.bpel-host: BPEL PM hostname only (current machine name)
- install.bpel-port: BPEL PM port only (default for JDeveloper is *9700*)
- install.bpel-domain: BPEL Domain created for deployment of FSCM processes

Note.	If some of these properties do not exist in your delivered file, they will need to be added and then updated with your specific parameters.

Create Deployable BPEL Files

This step creates a new folder structure to be used for the actual BPEL deployment. These files have the correct end point addresses for your configured environment entered in the install.properties file.

To perform these steps, first open the Oracle BPEL PM Developer Prompt. This special prompt window has many environmental properties already configured. Please see your BPEL PM documentation on how to start the Developer Prompt. For example on a Microsoft environment, merely select

Start→Programs→<your installation name given at install time>→Oracle BPEL Process Manager 10.1.2→Developer Prompt, and a command window will appear.

In the Developer Prompt, change directory to the <BPEL_PM_HOME>/integration/orabpel/peoplesoft directory. Enter the following command:

```
obant install "-Dpeoplesoft.pillar=fscm"
```

Once completed, a new directory, named fscm_<*date-time*>, is created. The directory name is listed in the output produced by the above command.

Deploying All BPEL Processes

As the final step, we actually perform the deployment of the BPEL processes onto the BPEL domain created previously. To do this, change directory into the new created fscm_<*date-time*> directory and update the fscminstall.properties.

Depending on the processes you wish to install, update the fscminstall.properties file specifying process specific tokens to be set. Please refer to product specific documentation to determine whether any of the processes you are deploying require this file to be updated.

Property	Description	Processes
SchemaFileLocation	Ensure that the directory structure fits with the location of the DummySupplier folder in the newly created time stamped directory	Dummy Supplier
BPELPassword	The password for the bpel server for the domain used	Travel Booking
OraBpelPlatform	The platform BPEL will be running on i.e. oc4j_10g, OC4J_BPEL.	Travel Booking
NamingProviderUrl	The address where BPEL server is residing. i.e. ormi://<server name>.peoplesoft.com/orabpel	Travel Booking
HttpsProxySet	Set to 'true' if a proxy server is used, 'false' if no proxy is used	Travel Booking
HttpsProxyHost	The host name of the proxy server	Travel Booking
HttpsProxyPort	The port number to use with the proxy server	Travel Booking
HttpsNonProxyHost	A pipe '|' separated list of hosts or domains that must be accessed directly rather than using the proxy server	Travel Booking

Once the fscminstall.properties file is updated, execute one or more of the following commands in the Developer Prompt window to deploy the processes:

1. To deploy all processes at the same time: `Obant`

   At the conclusion of this command, all processes should be deployed into the target domain.

2. To deploy a single process: `obant` *`processName`*

   Where *processName* is the name of a directory found in the fscm_<date-time> directory.

Note. If errors occur during deployment, confirm that both the BPEL PM and PeopleSoft systems are available and try again. If the problem persists, verify that both systems are not only available but have no errors (a restarting of the systems may be required).

Part II: Installing FMS, ESA, and SFO Applications

C H A P T E R 5

Installing PeopleSoft Enterprise 9.0 General Ledger

This document describes the steps necessary to establish the file attachment storage location for documents imported to PeopleSoft Enterprise General Ledger and database specifics for various file import processes.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 5-1	Change a URL Definition for G/L File Imports (optional)
Task 5-2	Define Environmental Variable on Process Scheduler Server
Task 5-3	Running File Import Processes Using the DB2/390 Database

The following file import processes depend on the setup described below:

Process	Description
GL_JRNL_IMP	Flat file journal import *(previously GLS9002.SQR)*
GL_LED_IMP	Flat file ledger import *(previously GLS9003.SQR)*
GL_EXCL_JRNL	Spreadsheet journal batch import *(previously GLS9000.SQR)*
GL_F2_MAF	FACTS II Load MAF Data
GLFACTSI_MAF	FACTS I Load Data (FACTSI MAF, SGL Accounts, Trading Partners)
GL_GOALS_IMP	GOALS Disbursement/Receipt Files (Ledger Activity and Trial

	Balance)

Task 5-1: Change a URL Definition for G/L File Imports (optional)

The storage location of the file attachment is defined by the URL definition GL_FILE_IMPORT. By default, it points to a database record. You might want to change the storage location of the file attachment to another location, such as an FTP server. This is optional.

To change this URL definition, navigate to **PeopleTools, Utilities, Administration, URLs.**

1. Open GL_FILE_IMPORT.

2. Change to an FTP server location of your choice.

> See Also: *PeopleSoft 8.48 PeopleTools PeopleBook: PeopleCode Developer's Guide*, Using Methods and Built-In Functions, "Understanding File Attachment Architecture".

Task 5-2: Define Environmental Variable on Process Scheduler Server

You are required to define an environmental variable, **PS_FILEDIR.** This variable defines the temporary flat file location on the process scheduler that runs the file import process.

- If you have a Unix or OS390 process scheduler, edit **psconfig.sh** file and specify in environment variable PS_FILEDIR the flat file location. For example:

```
PS_FILEDIR=/tmp;export PS_FILEDIR
```

- If you have an NT/Win2000 process scheduler, navigate to Control Panel, System (Advanced Tab), Environment Variables. Add or modify system variable PS_FILEDIR, and specify its value. For example:

```
C:\TEMP
```

> **Note.** For more technical information on this topic, please refer to the PeopleTools description of **GetFile() PeopleCode** for details, or consult your system administrator.

Task 5-3: Running File Import Processes Using the DB2/390 Database

This is a reminder for those who would run import processes in general. If the import process enables you to specify Character Set, select the Character Set appropriate to the flat file being imported. For example, you might select ISO_8859-6 for Arabic; and JIS_X_0208 or Shift_JIS for Japanese.

For those running specific import processes: GL_F2_MAF, GLFACTSI_MAF, and GL_GOALS_IMP

If you have a DB2/390 database and you prepare the flat file in ASCII format, you can run the process on only NT or Unix process schedulers. If you prepare the flat file in EBCDIC format, you can run the import process only on OS390 process schedulers. For all other databases, there is no limitation on the type of process schedulers. The appropriate process schedulers should be setup for these processes.

CHAPTER 6

INSTALLING AND SETTING UP FORMS PROCESSING FOR PEOPLESOFT ENTERPRISE 9.0 GRANTS

The PeopleSoft Enterprise Grants forms printing solution uses file layouts to generate XML. This is accomplished using existing PeopleTools functionality. Through the use of XML/XFDF, the PeopleSoft Grants forms solution maps all of the required data elements to the actual sponsor forms. As a result, you can edit and print forms online using Adobe Acrobat Reader 5.0. Because this solution uses standard PeopleTools technology, you no longer need to engage a third party to fulfill your forms printing needs.

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

- **Grant Application (PHS 398):** This is the set of proposal application forms that the National Institutes of Health requires for funding requests. It should be noted that this form set is in the process of being superceded by SF-424 R&R submissions through Grants.gov.
- **Non-Competing Grant Progress Report (PHS 2590):** This is an interim progress report that the National Institutes of Health requires recipients to submit for funding. This form is typically submitted on an annual basis.
- **Federal Cash Transaction Report (SF- 272):** This is an Office of Management and Budget form that is utilized to provide an accounting of your cash position with the government during a specific time frame. This form is typically submitted on a quarterly basis.
- **Financial Status Report (SF-269):** This is an Office of Management and Budget form. It is utilized to provide a periodic accounting on grants that you have received. It includes information such as expenditures, budget, and remaining balances.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 6-1	Download the Forms from the Sponsor Websites
Task 6-2	Set Up the Forms URL Maintenance Area in PeopleSoft
Task 6-3	Enter the Names of the PDF Templates
Task 6-4	Print the Forms (optional)
Task 6-5	View Reports (optional)

Task 6-1: Download the Forms from the Sponsor Websites

To set up the forms solution for on your database, you must download all of the following .pdf files from the sponsor Websites:

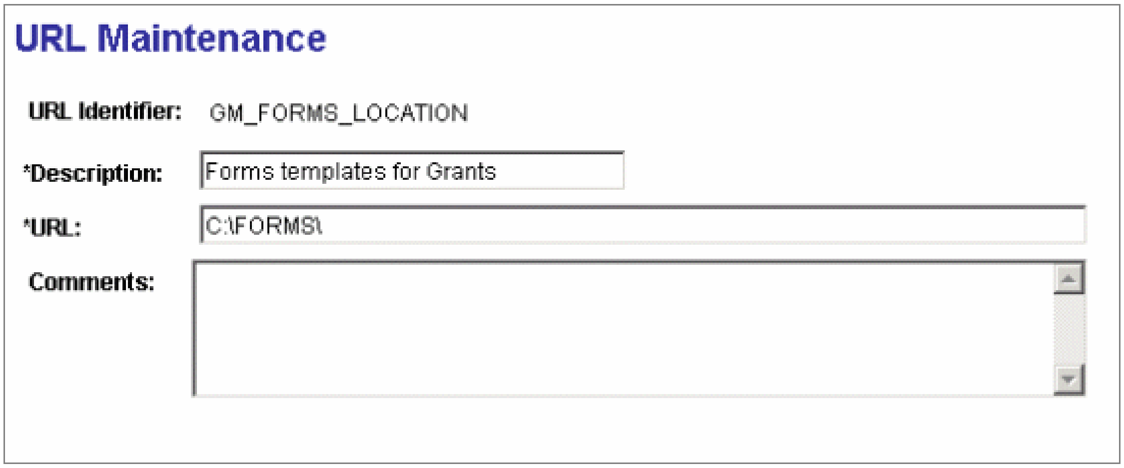
- http://grants.nih.gov/grants/funding/2590/2590_forms.pdf
- http://grants.nih.gov/grants/funding/phs398/398_forms.pdf
- http://grants.nih.gov/grants/funding/phs398/biosketch.pdf
- http://grants.nih.gov/grants/funding/phs398/continuation.pdf
- http://grants.nih.gov/grants/funding/phs398/fp4.pdf
- http://grants.nih.gov/grants/funding/2590/enrollmentreport.pdf
- http://www.whitehouse.gov/omb/grants/sf269a.pdf
- http://www.whitehouse.gov/omb/grants/sf272.pdf
- http://www.whitehouse.gov/omb/grants/sf272a.pdf

> **Note.** Place these files in the location defined for the URL Maintenance area (see below).

Task 6-2: Set Up the Forms URL Maintenance Area in PeopleSoft

1. Access the URL Maintenance page by navigating to **PeopleTools**, **Utilities, Administration, URLs**.

2. Search for **GM_FORMS_LOCATION**.



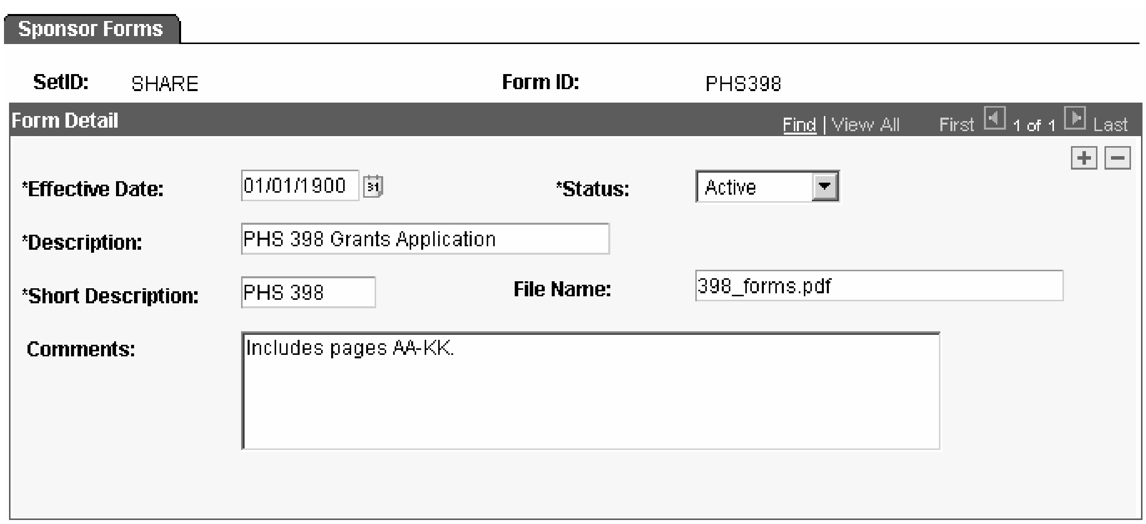
URL Maintenance page

3. Enter the location where you placed the forms in the **URL** field. Click Save.

   This location can be a file system location such as **G:\FORMS\.** In this case, the users will need to have access to this location when viewing the printed forms. This location can also be a Web address such as http://www.university.edu/Administration/Grants/Forms/.

Task 6-3: Enter the Names of the PDF Templates (optional)

1. Access the Sponsor Forms page by navigating to **Set Up Financials/Supply Chain, Product Related, Grants, Sponsor Forms**.



Sponsor Forms page

2. Search for and access the pages for the forms listed in the table below. Then, ensure that the file names listed below are reflected in the **File Name** field.

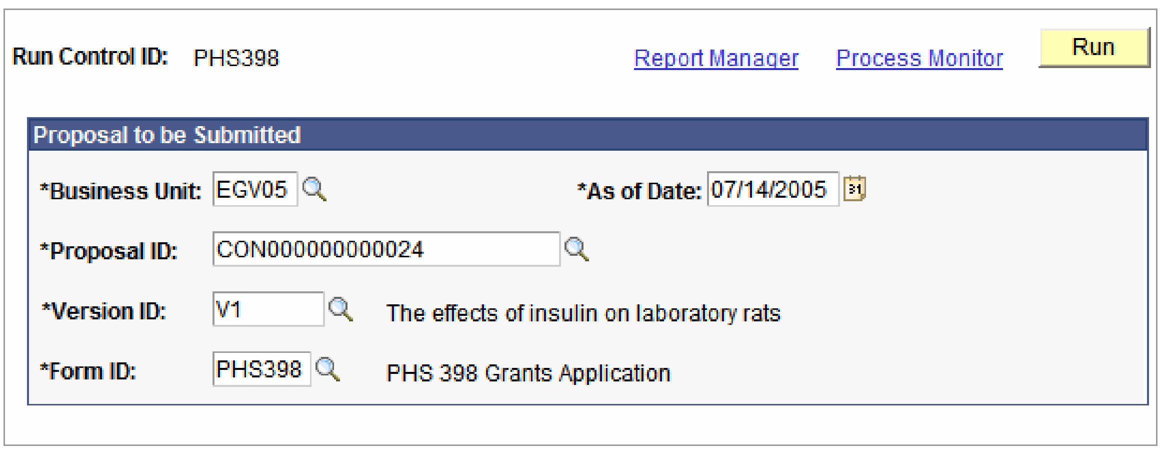
Note. If you are making changes to currently effective dated values, you must do so by first clicking on the **Correct History** button to enter the correction mode.

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

Task 6-4: Print the Forms (optional)

1. Access the Create Printed Proposal page by navigating to **Grants, Proposals, Print Proposal.** Create your own **Run Control ID.**

2. Select the **Business Unit, Proposal ID, Version ID** and **Form ID** of the proposal you are submitting. Select the values as shown in the screenshot below by choosing from the options displayed after clicking on the magnifying glass icon.



Proposal to be Submitted page

3. Click **Run.**

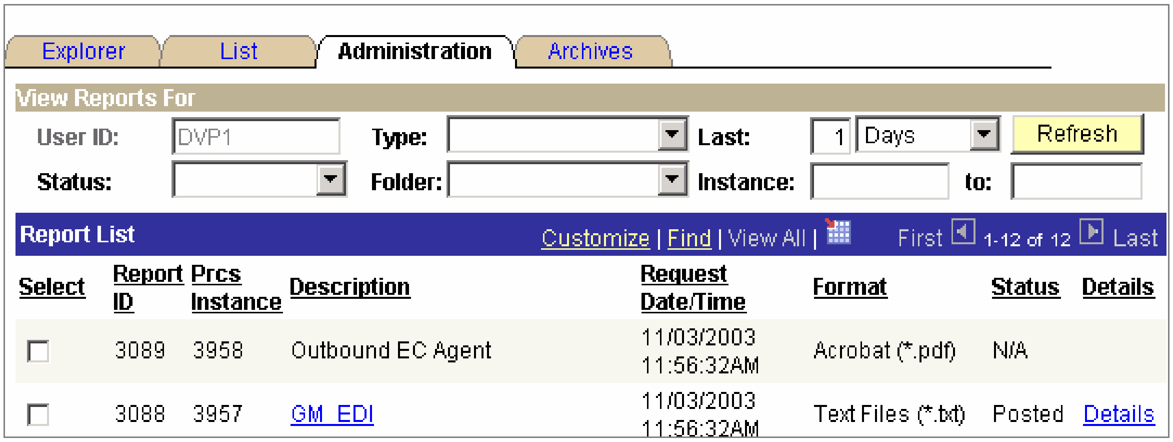
   The system displays the Process Scheduler Request page.

4. Select the server you want to use in the **Server Name** field and then click **OK**.

Task 6-5: View Reports

Note. To view reports you need Acrobat Reader 5.0 or later.

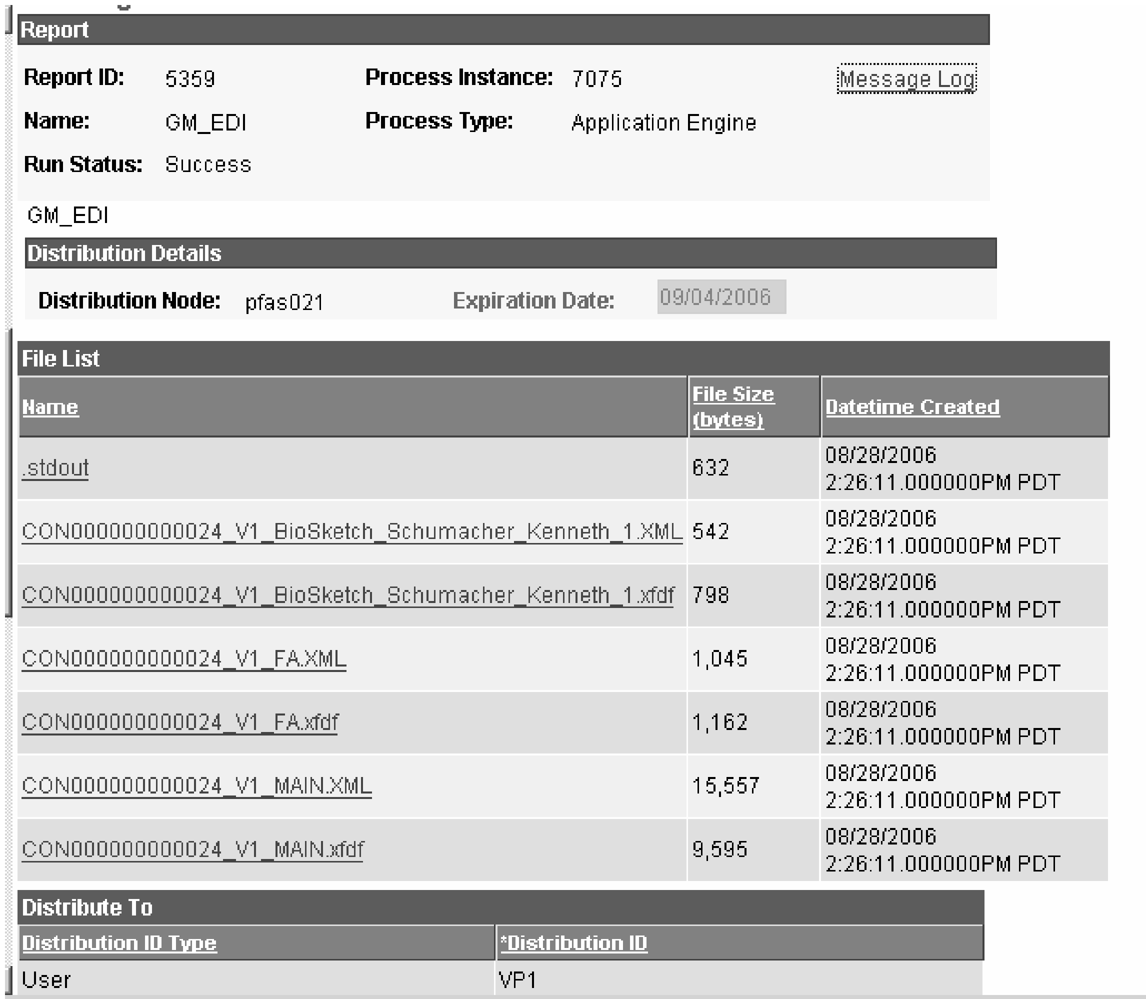
1. Access the Report Manager – Administration page by navigating to **Reporting Tools, Report Manager, Administration.**



Administration page

2. Locate your process instance (the report description is GM_EDI).

3. Click GM_EDI **Details** to see a list of the files related to the proposal.


Report

Report ID: 5359 **Process Instance:** 7075 Message Log

Name: GM_EDI **Process Type:** Application Engine

Run Status: Success

GM_EDI

Distribution Details

Distribution Node: pfas021 **Expiration Date:** 09/04/2006

File List

Name	File Size (bytes)	Datetime Created
.stdout	632	08/28/2006 2:26:11.000000PM PDT
CON000000000024_V1_BioSketch_Schumacher_Kenneth_1.XML	542	08/28/2006 2:26:11.000000PM PDT
CON000000000024_V1_BioSketch_Schumacher_Kenneth_1.xfdf	798	08/28/2006 2:26:11.000000PM PDT
CON000000000024_V1_FA.XML	1,045	08/28/2006 2:26:11.000000PM PDT
CON000000000024_V1_FA.xfdf	1,162	08/28/2006 2:26:11.000000PM PDT
CON000000000024_V1_MAIN.XML	15,557	08/28/2006 2:26:11.000000PM PDT
CON000000000024_V1_MAIN.xfdf	9,595	08/28/2006 2:26:11.000000PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	VP1

Report Detail page

4. To view or print a file, download it to a local location.

5. Click the file to open it.

CHAPTER 7

INSTALLING AND SETTING UP ELECTRONIC SUBMISSION TO GRANTS.GOV FOR PEOPLESOFT ENTERPRISE 9.0 GRANTS (OPTIONAL)

In the Grants 9.0 release we have introduced functionality to support integration with Grants.gov. This provides users the ability to submit grants applications electronically to Grants.gov using SOAP with attachments.

> **Note.** This chapter is only applicable to customers who will be using the Grants.gov functionality. In addition to completing the steps outlined below, you must complete all of the registration requirements outlined on the Grants.gov website as well as NIH website prior to going into production with them. The Grants.gov electronic application submission functionality provided is limited to the SF 424 R&R family and the schemas that fall under it.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 7-1	Stop Web Server and AppServer
Task 7-2	Copy Customer Connector Files
Task 7-3	Set Up Environment Variables

Task 7-4	Copy Keystore File
Task 7-5	Restart Web Server and AppServer
Task 7-6	Set Up Gateway
Task 7-7	Set Up FTP Server
Task 7-8	Set Up URL for Grants.gov Web Services
Task 7-9	Turn on Grants.gov enabled flag
Task 7-10	Set up DUNS Number
Task 7-11	Set up AOR

Task 7-1: Stop Web Server and AppServer

Since Task 7-2 through Task 7-4 refer to changes to be performed on the web server and AppServer, the web server and AppServer have to be stopped before these steps are performed.

Task 7-2: Copy Customer Connector Files

To set up the Grants.gov solution:

To set up the Grants.gov solution, you must copy the customer connector files as follows:

- Copy %PSHOME%\class\com.peoplesoft.fscm.gm.jar file into %PSHOME%\webserv\peoplesoft\applications\peoplesoft\PSIGW \WEB-INF\lib
- Copy %PSHOME%\class\GrantsTargetConnector.class file into %PSHOME%\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\classes\com\peoplesoft\pt\integrationgateway\targetconnector
- Copy %PSHOME%\setup\grants\orasaaj.jar file into %PSHOME%\webserv\peoplesoft\applications\peoplesoft\PSIGW \WEB-INF\lib
- Copy %PSHOME%\setup\grants\xmlparserv2.jar file into %PSHOME%\webserv\peoplesoft\applications\peoplesoft\PSIGW \WEB-INF\lib

Task 7-3: Set Up Environment Variables

To set up environment variables:

1. Make sure the environment variable TEMP is set up in your operating system where you run your AppServer. For example, if your AppServer is on a Windows operating system you may set TEMP = C:\temp.

   This environment location will be used to store the XML files that are generated by the Grants application engine processing. Users of the product should be granted READ/WRITE access to this environment.

2. Modify the file %PS_HOME%\webserv\peoplesoft\setenv.cmd:

   a) Add a line to the XMLPARV variable just before the PSCLASSPATH variable:

   ```
   SET
   XMLPARV=%PS_HOME%\webserv\%DOMAIN_NAME%\applications\peoplesoft\PSIGW\WEB-
   INF\lib\xerces.jar
   ```

   b) Modify the set statement for the PSCLASSPATH variable:

   ```
   SET PSCLASSPATH=%XMLPARV%;%PSCLASSPATH%;%PSPORTLETS%;%PSXERCES%
   ```

Task 7-4: Copy Keystore File

Note. You may need assistance from your web administrator to perform this step.

To copy the keystore file:

Since Grants.gov uses Secure Socket Layer (SSL) and mutual authentication for managing the security of a message transmission over the Internet, users must:

1. Get a digital certificate key and place it into a keystore file.

   Note. If your organization does not have a digital certificate key, you will have to work with your web administrator to secure one.

2. Copy this keystore file into the directory %PS_HOME%\webserv\peoplesoft\keystore.

Task 7-5: Restart Web Server and AppServer

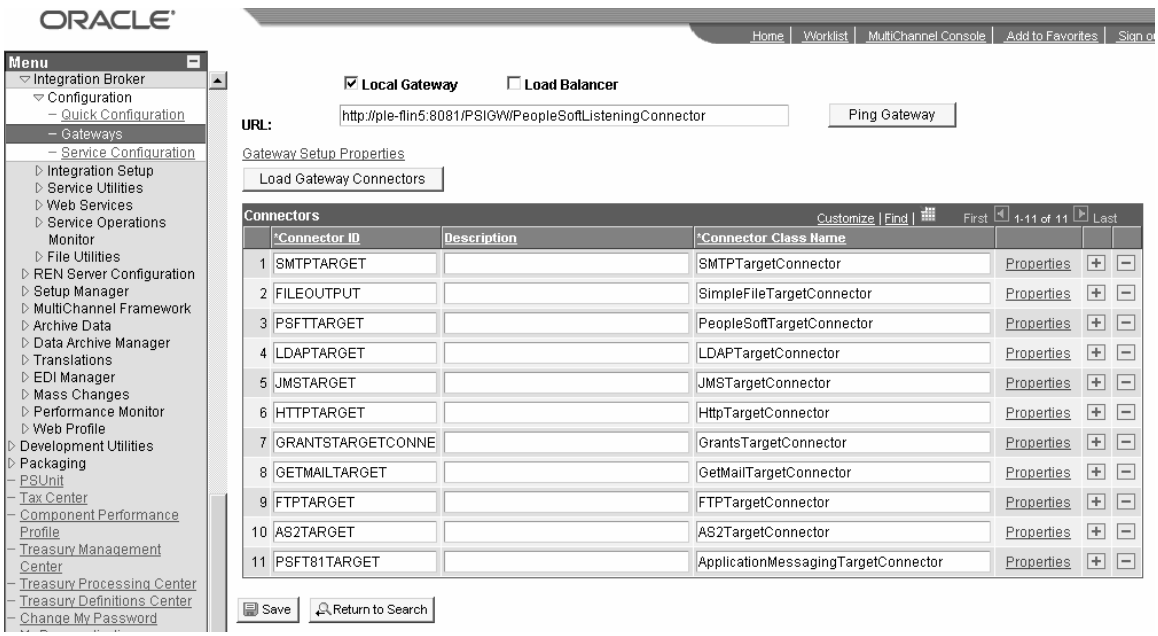
Re-start your Web Server and AppServer.

Task 7-6: Set Up Gateway

To set up the gateway:

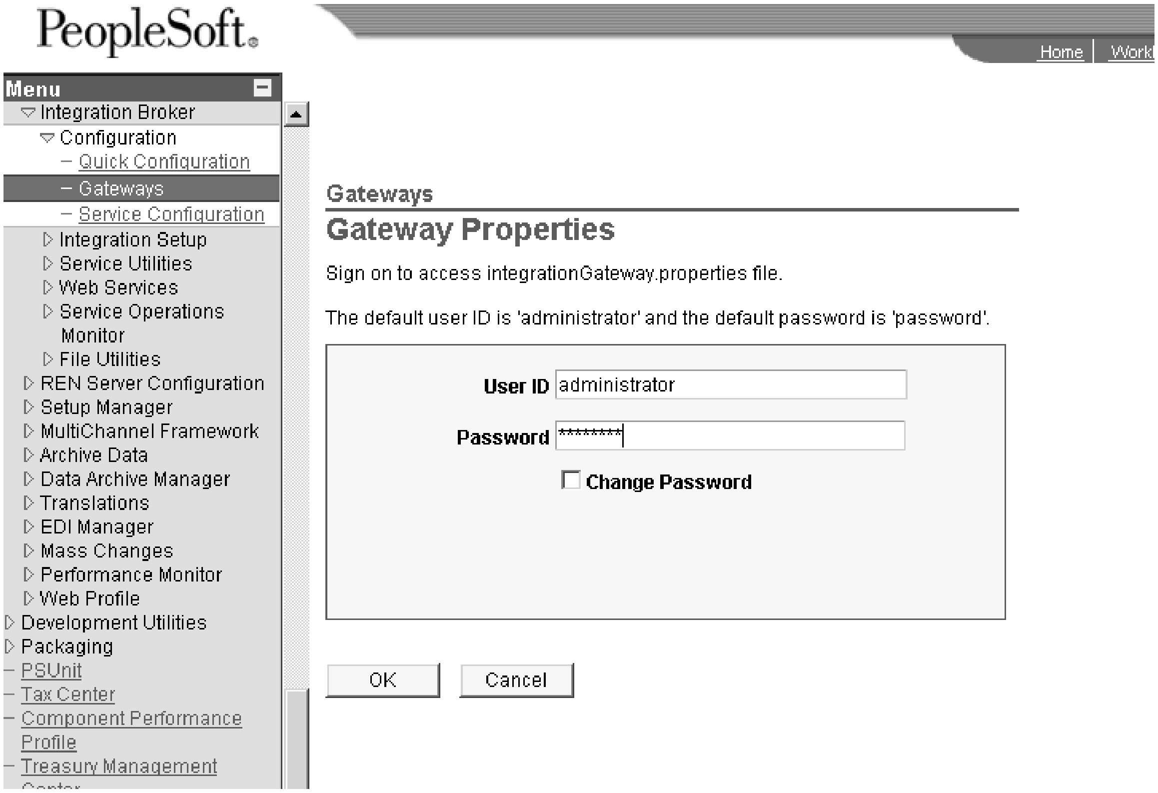
Since PeopleTools Integration Broker is used to communicate with Grants.gov, you have to set up the Gateway and its properties (Make sure that your gateway has been set up before this step):

1. Make sure that your customer connector GrantsTargetConnector has been loaded into the gateway.



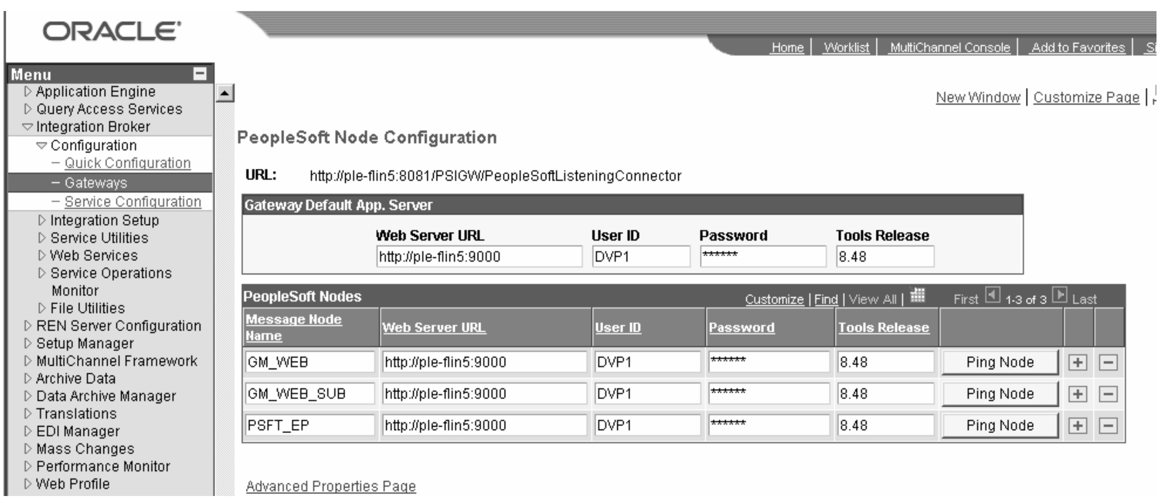
Gateways page

2. Click on the **Gateway Setup Properties** link and login.



Gateways – Gateway Properties page

3. Add these nodes into the gateway: GM_WEB, GM_WEB_SUB and PSFT_EP.



PeopleSoft Node Configuration page

4. Set gateway advanced properties. Click on the **Advanced Properties Page** link.

Gateway Properties page

a) Set SSL key's Alias name and password:

For example:

```
ig.certificateAlias=localhost
ig.certificatePasswd=ABFGL92FAH5zJtN07S2gqQ==
```

b) Set Keystore file directory and password:

For example:

```
secureFileKeystorePath=PS_HOME/webserv/peoplesoft/keystore/applicant-s2s-
keystore.jks
secureFileKeystorePasswd=changeit
```

Task 7-7: Set Up FTP Server

To set up the FTP server:

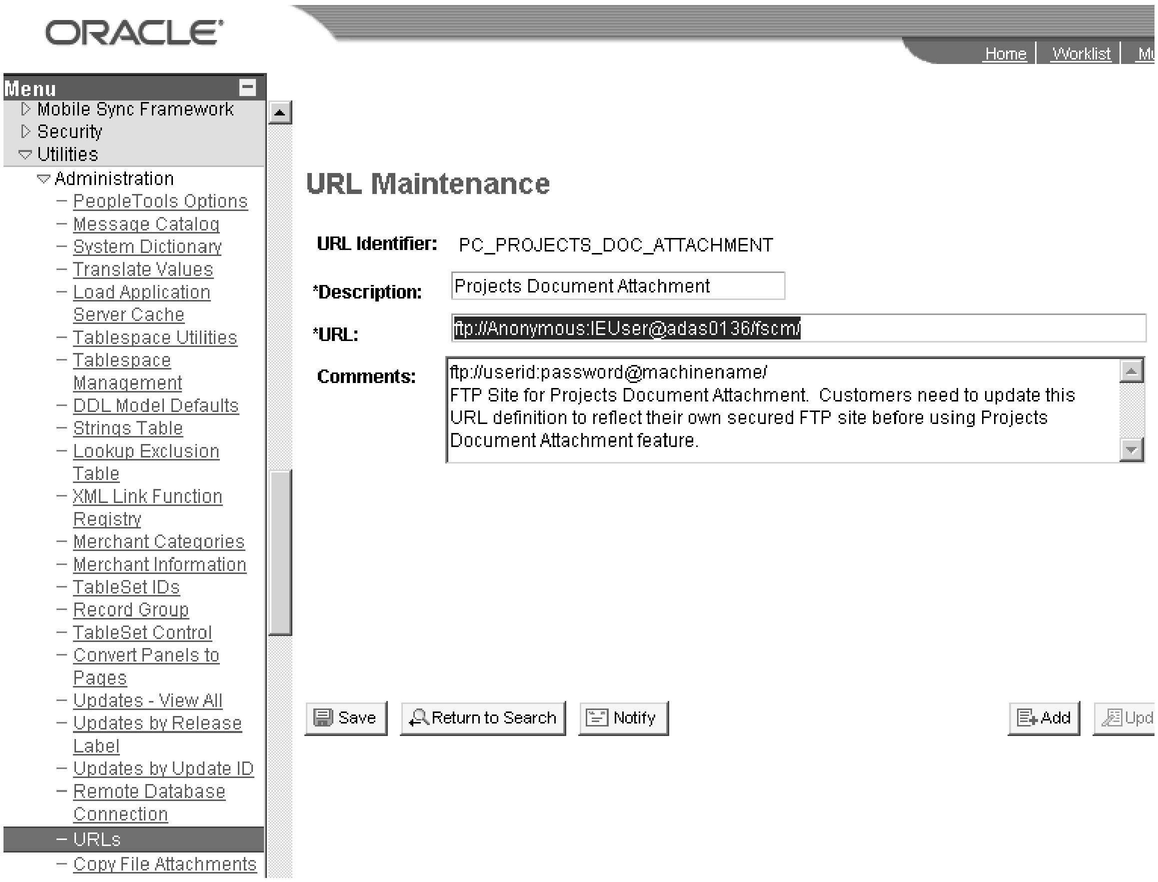
1. Set up FTP server URL:

a) Go to PeopleTools → Utilities → Administration → URL.

b) Search for *PC_PROJECTS_DOC_ATTACHMENT*.

c) Change the value of the **URL** field.

d) Click **Save.**



URL Maintenance page

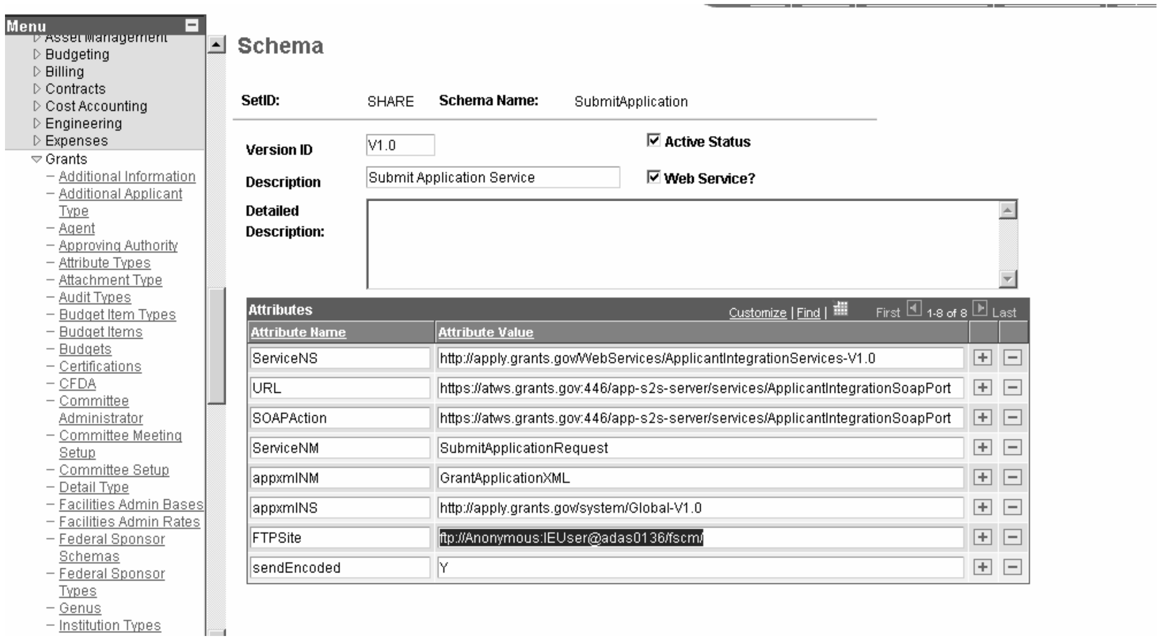
2. Set up FTP site for submitApplication:

a) Go to Set Up Financials/Supply Chain → Product Related → Grants → Schemas.

b) Search for *SubmitApplication* and set FTP server for *FTPSite* in **Attributes** grid.

c) Change the value of *FTPSite.*

d) Click **Save.**



Schema page

Task 7-8: Set Up URL for Grants.gov Web Services

There are two attributes (URL and SOAPAction) defined in GM_SCHEMA to indicate the server of web services. The system is set up to point to Grants.gov AT server, which is the testing server. You have to change it to point to the production server, which is https://ws.grants.gov:446/app-s2s-server/services/ApplicantIntegrationSoapPort. Make sure to change the server for all four of the following services.

- GetOpportunityList
- GetApplicationList
- GetApplicationStatusDetail
- SubmitApplication

To set up the URL for Grants.gov web services:

1. Go to Set Up Financials/Supply Chain → Product Related → Grants → Schemas.

2. Search for the service.

3. Change the value of the *URL* and *SOAPAction.*

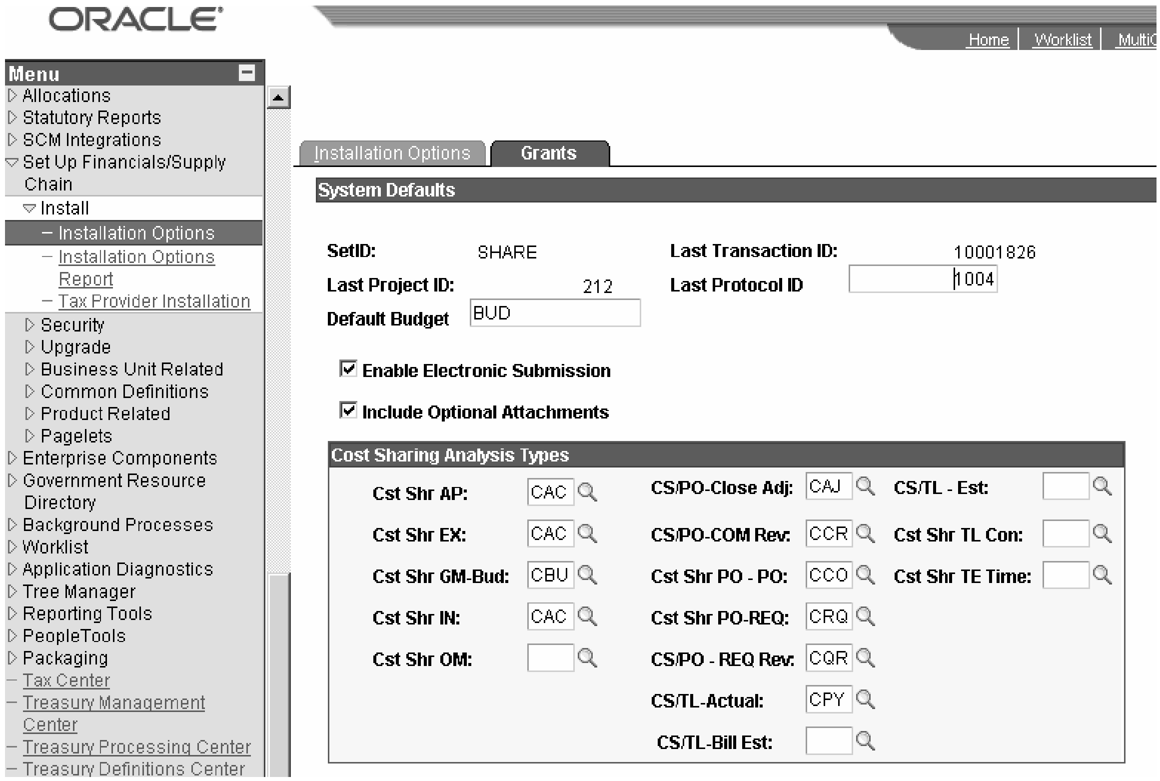
4. Click **Save.**

Schemas page

Task 7-9: Turn on Grants.gov enabled flag

To turn on the Grants.gov enabled flag:

1. Go to Set Up Financials/Supply Chain → Install → Installation Options → Grants.
2. Check the **Enable Electronic Submission** check box on the Installation Options – Grants page.

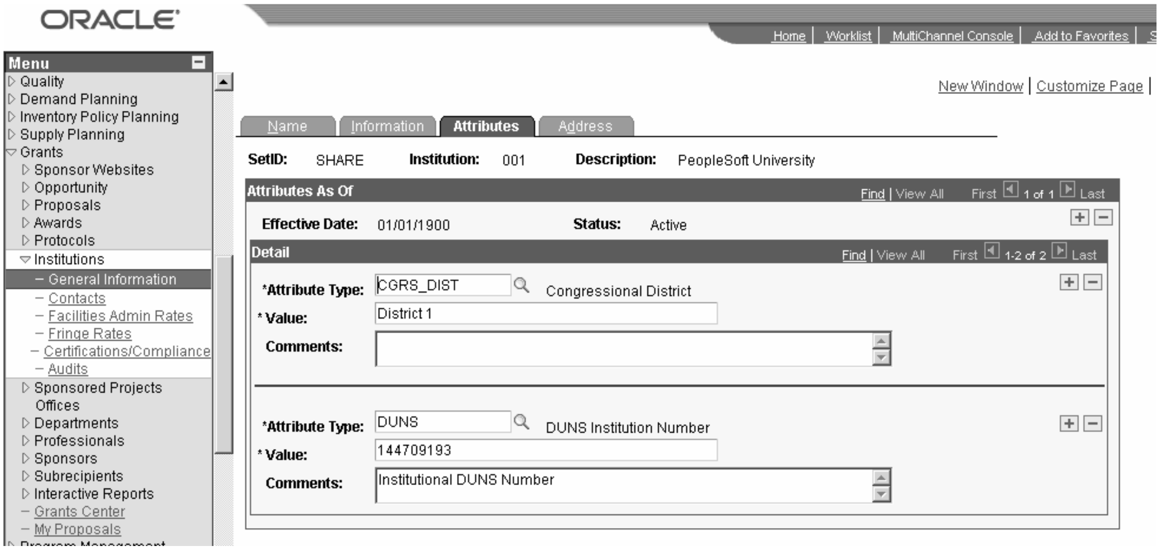


Installation Options – Grants page

Task 7-10: Set up DUNS Number

To set up the DUNS number:

Go to Grants → Institution and set up *DUNS*. This should be the same DUNS number that you register with Grants.gov and other agencies.

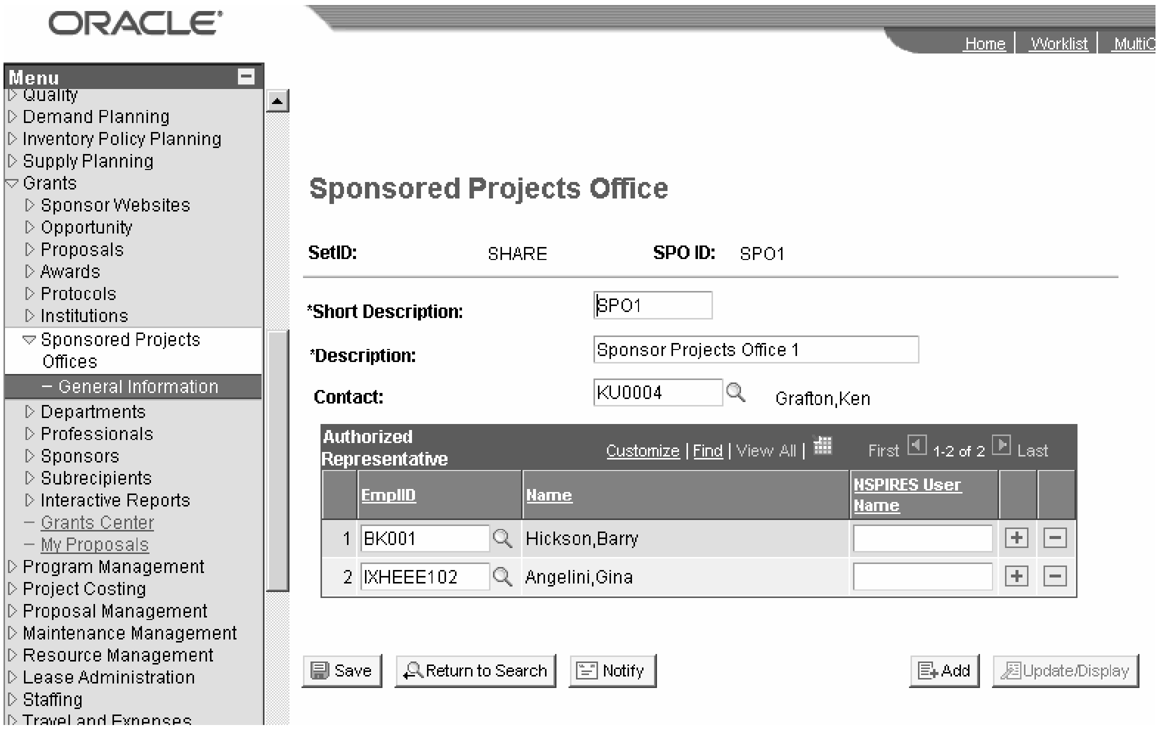


Attributes page

Task 7-11: Set up AOR

To set up the AOR:

Go to Grants → Sponsored Projects Offices → General Information and set up Authorized Representative. Make sure that you are using the same AORs that are registered with Grants.gov and other agencies.



Sponsored Projects Office page

CHAPTER 8

INSTALLING PEOPLESOFT ENTERPRISE 9.0 EXPENSES

This document provides additional instructions on how to install PeopleSoft Enterprise Expenses.

This installation section covers the configuration of Integration Broker for Approvals and the configuration of the Employee Portal Servlet URL.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 8-1	General Integration Broker configuration
Task 8-2	Configure the Employee Portal Servlet URL

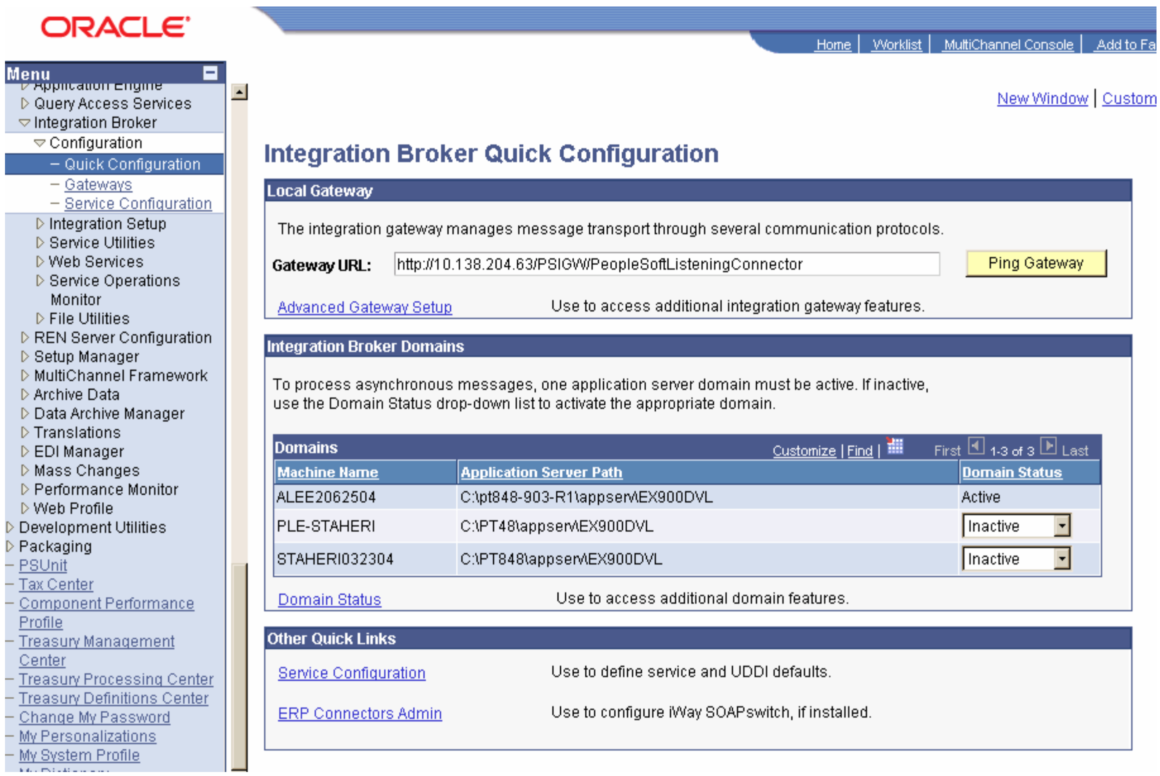
Task 8-1: General Integration Broker configuration

This step confirms that the settings for Quick Configuration, Gateways and Service Configuration are properly configured.

Quick Configuration

1. Navigate to PeopleTools→Integration Broker→Configuration→Quick Configuration.

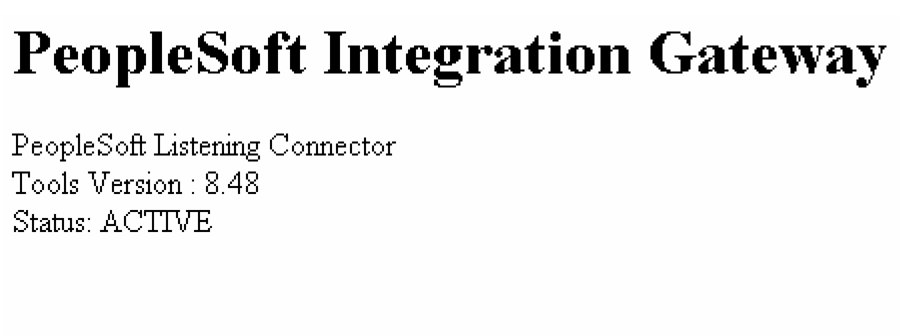
2. Change the Gateway URL to http://<IB Hostname>:<port>/PSIGW/PeopleSoftListeningConnector. The colon and port entry are optional if the port number is the default.



Integration Broker Quick Configuration page

3. Click **Save.**

4. Ping the gateway to make sure it is responding and note the exact tools version.



Gateways

1. Navigate to PeopleTools→Integration Broker→Configuration→Gateways.

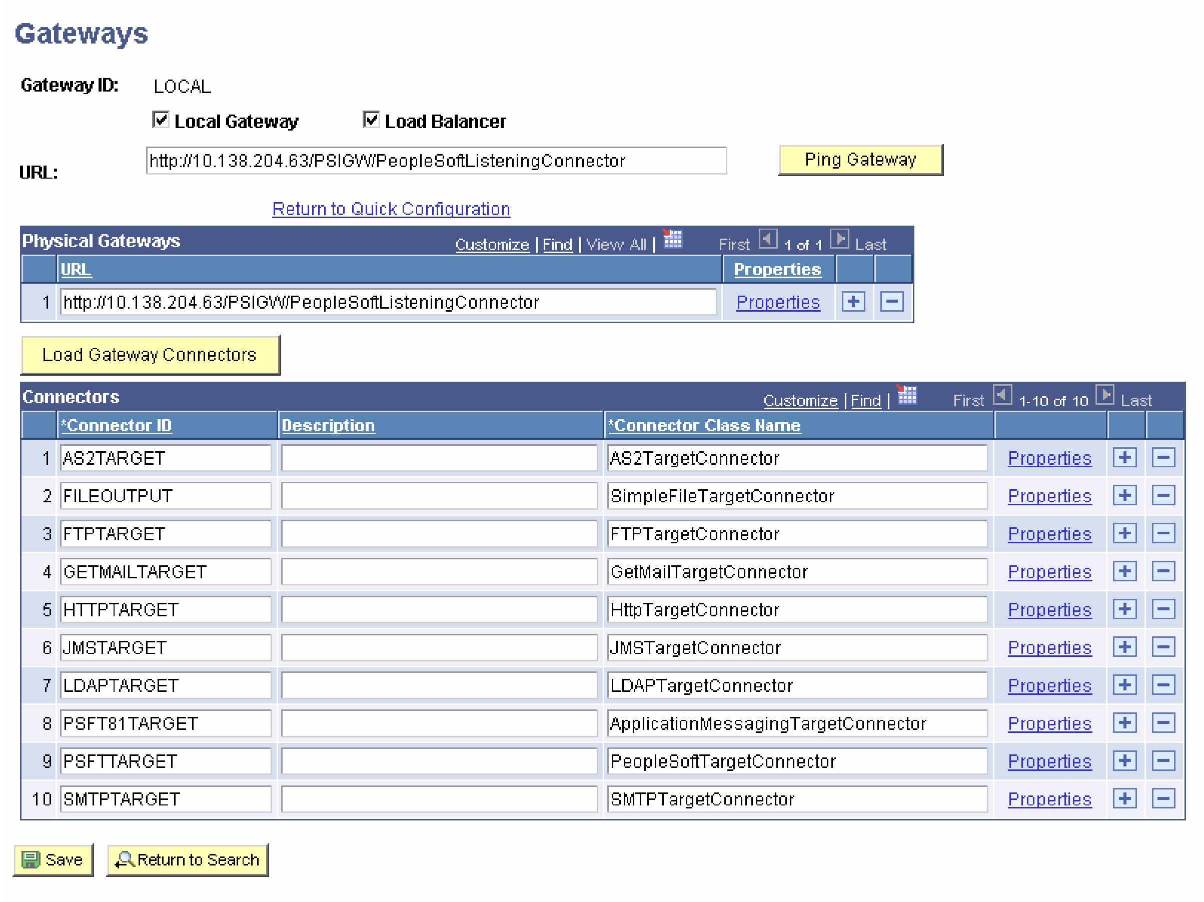
2. Select the check boxes for **Local Gateway** and **Load Balancer.**

3. Enter the URL for the Local Gateway and the Physical Gateway as *http://<IB Hostname>:<port>/PSIGW/PeopleSoftListeningConnector*.

4. Click the **Load Gateway Connectors** button.

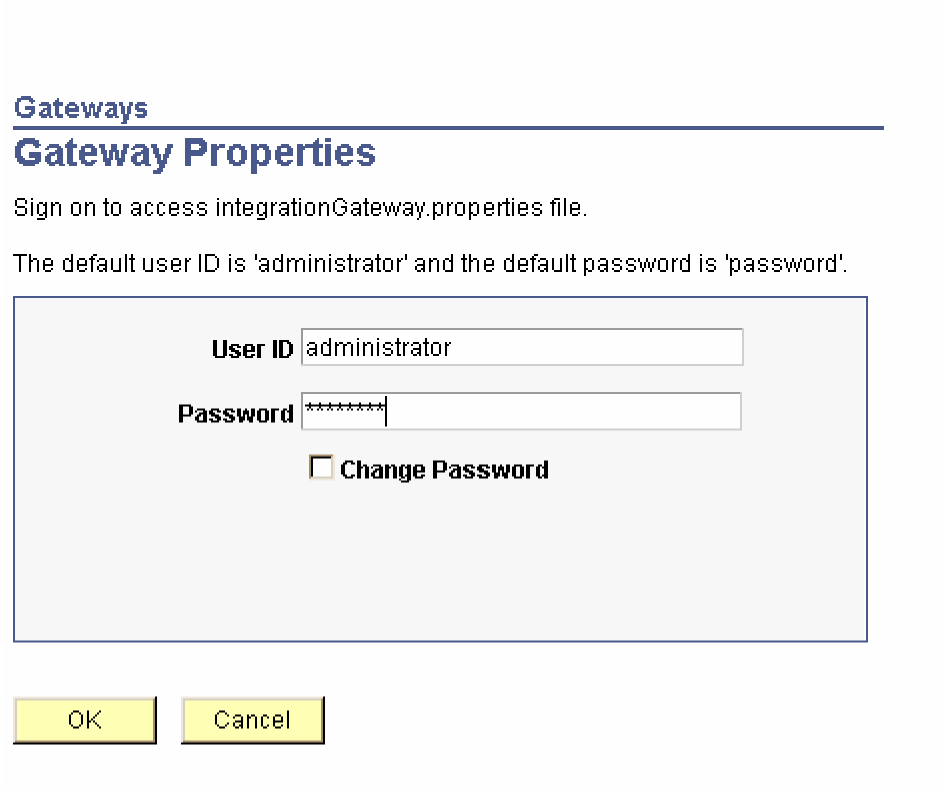
5. Click **Save.**

6. Click the **Ping Gateway** button to ensure connectivity and proper configuration.



Gateways page

7. Click the **Properties** link in the **Physical Gateways** grid and enter administrator/password for the **User ID** and **Password** fields on the Gateways – Gateway Properties page.

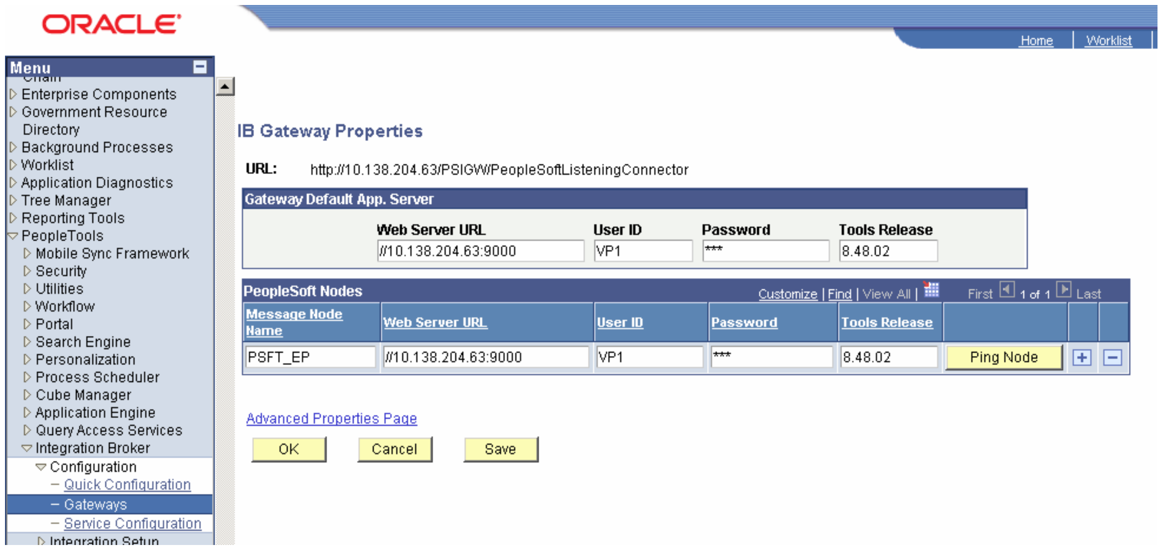


Gateways – Gateway Properties page

8. Enter the **Webserver URL, User ID, Password** and **Tools Release** fields in the **Gateway Default App. Server** group box.

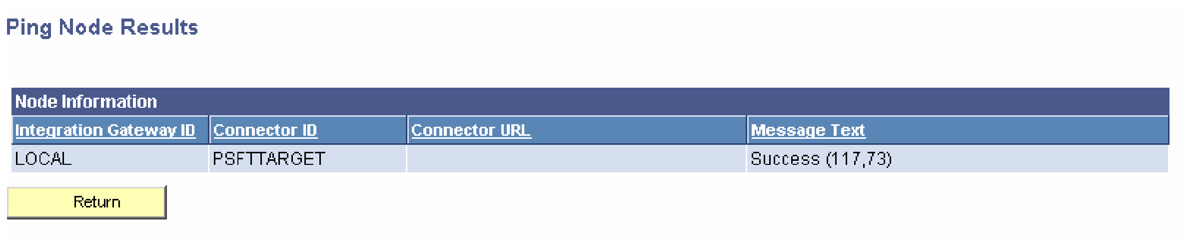
9. Add Node: PSFT_EP (The FSCM application server node).   Get the PeopleTools release number from pinging the gateway as it must match exactly.

10. Click **Save.**



IB Gateway Properties page

11. Ping the PSFT_EP node to make sure they are responsive. You will see the following page if a ping is successful.

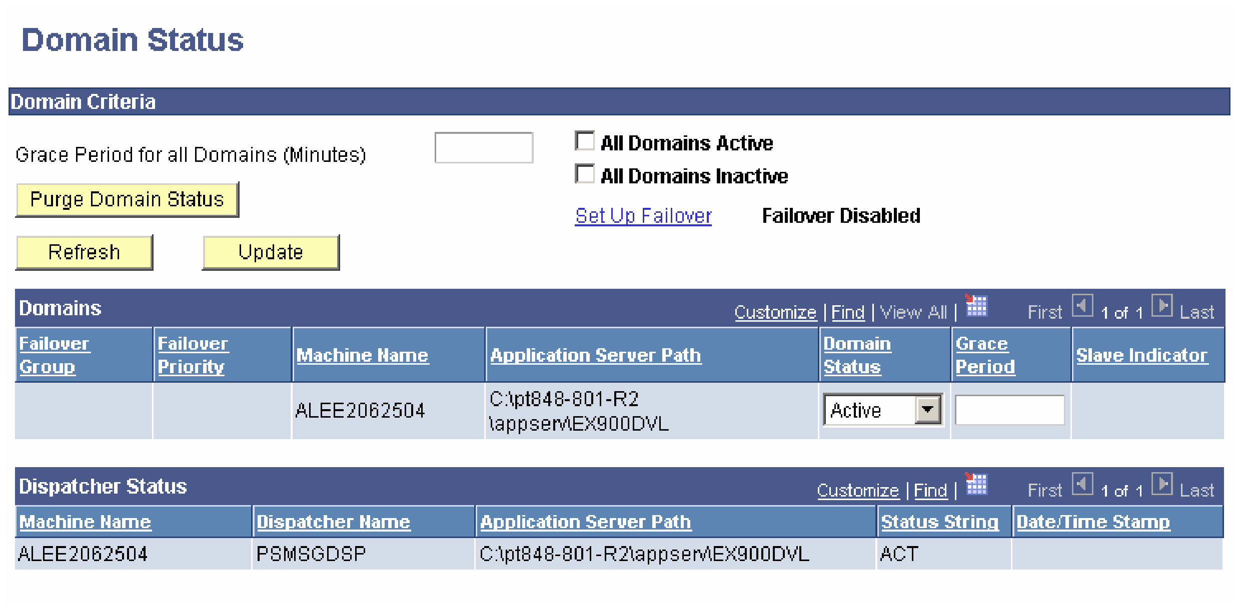


Ping Node Results page

Activating the Local Domain

1. Navigate to PeopleTools > Integration Broker > Service Operations Monitor > Administration > Domain Status.

2. Set the Domain Status for the Application Server to *Active* and click the **Update** button.



Domain Status page

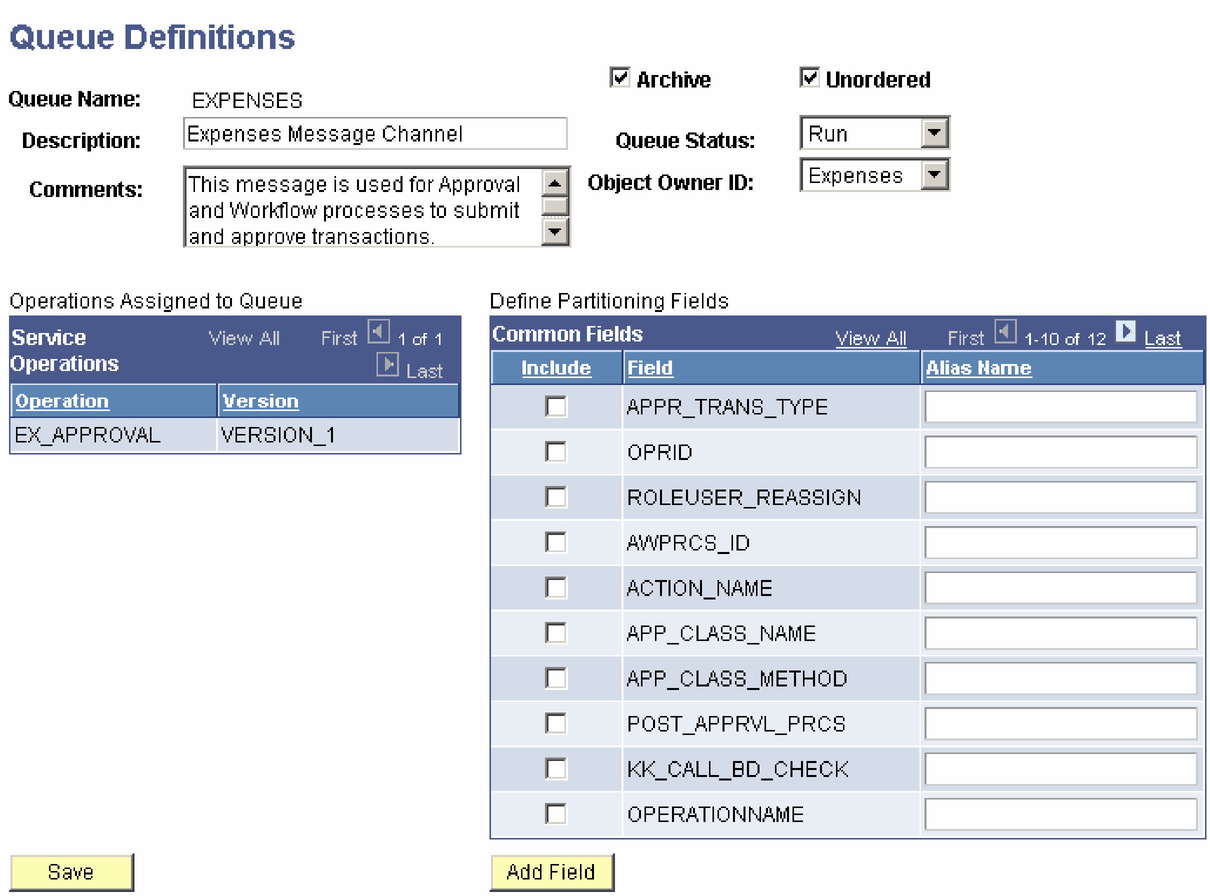
> **Note.** If your Machine Name does not appear in this list, push Purge Domain Status button and then push Refresh button.

Activating Queue Definitions

1. Navigate to PeopleTools > Integration Broker > Integration Setup > Queues.

2. Search Queue Name: *EXPENSES.*

3. Select *Run* on the Queue Status dropdown box and then click the **Save** button.



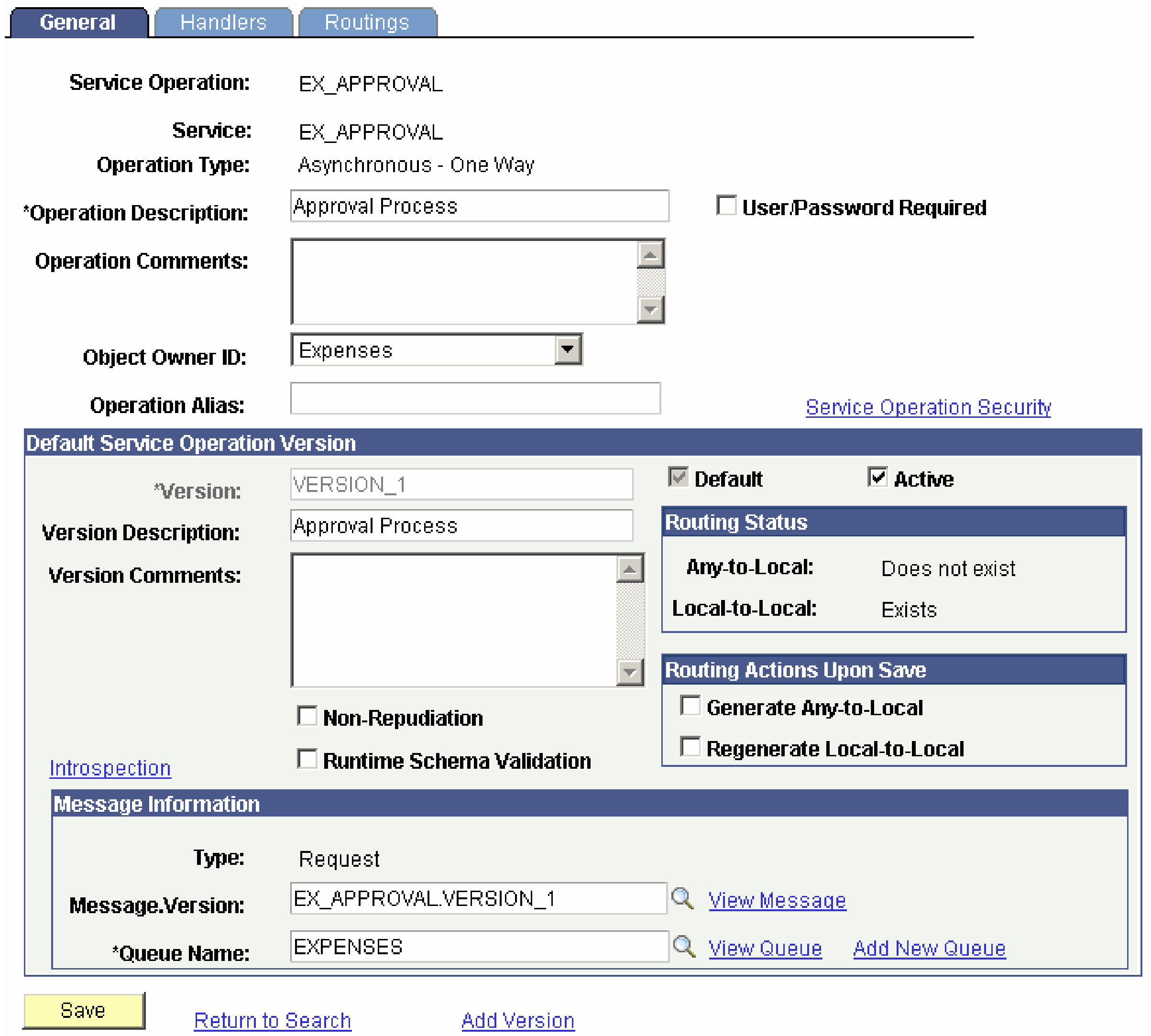
Queue Definitions page

Setting up Service and Handlers

1. Navigate to PeopleTools > Integration Broker > Integration Setup > Service Operations.

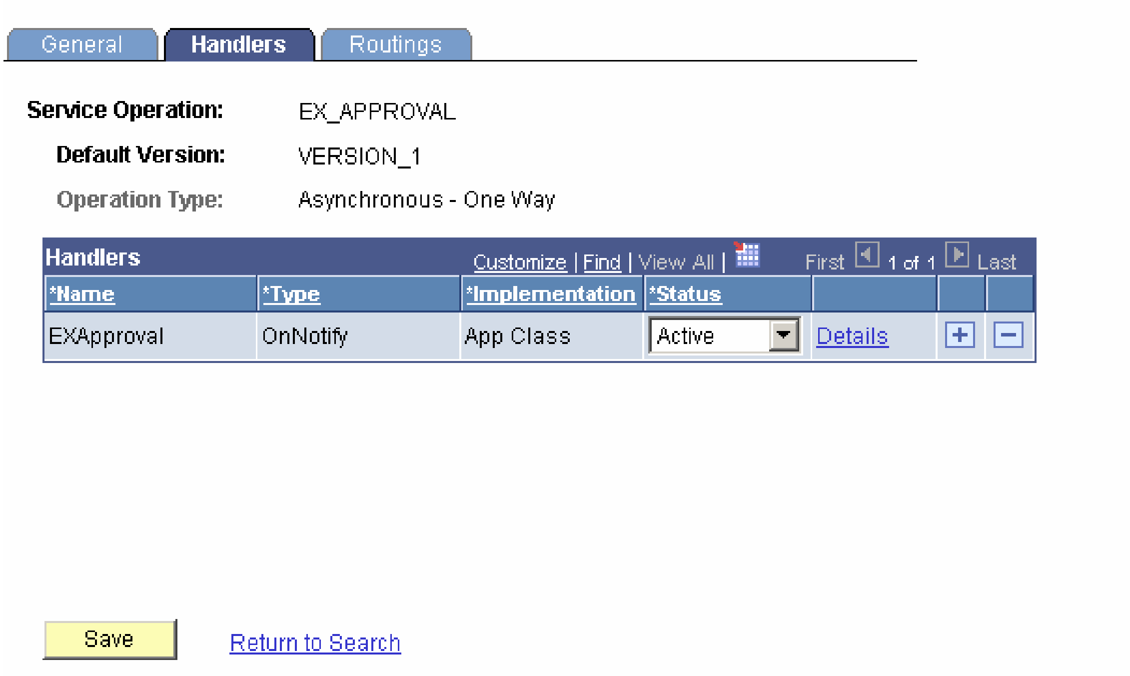
2. Search Service Operation: *EX_APPROVAL.*

3. Check the **Active** check box in the **Default Service Operation Version** group box and then click the **Save** button.



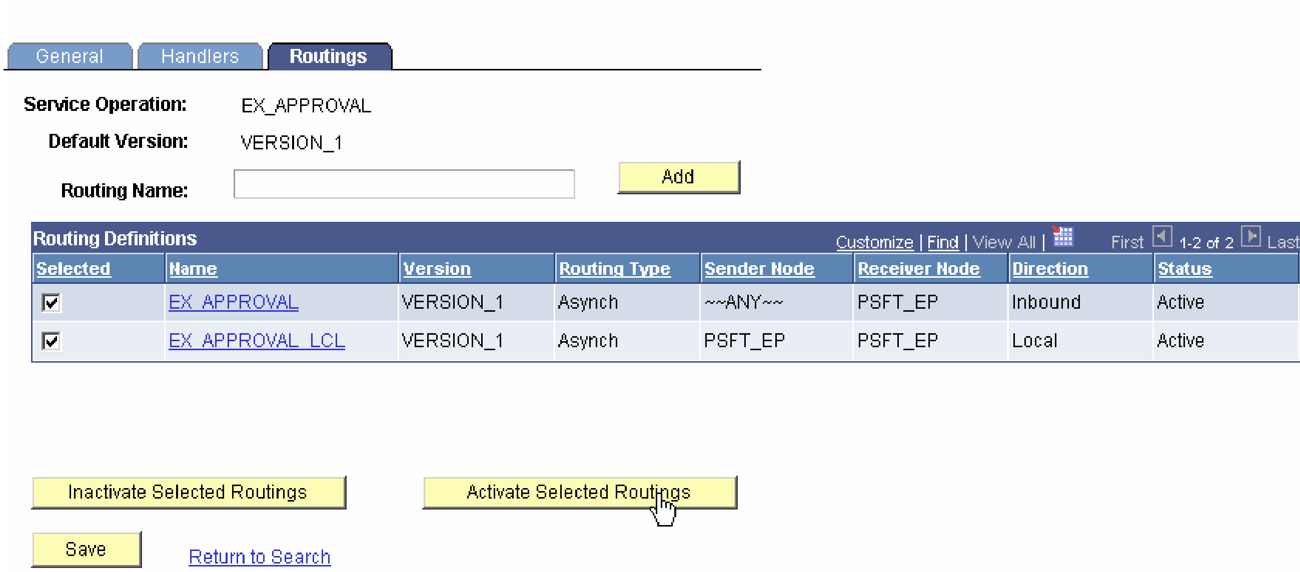
General page

4. Go to the Handlers tab and set the **Status** field of the AppClass to *Active* and click the **Save** button.



Handlers page

5. Go to the Routings tab and activate the routings by selecting the check boxes and pressing the **Activate Selected Routings** button. Then, click the **Save** button.

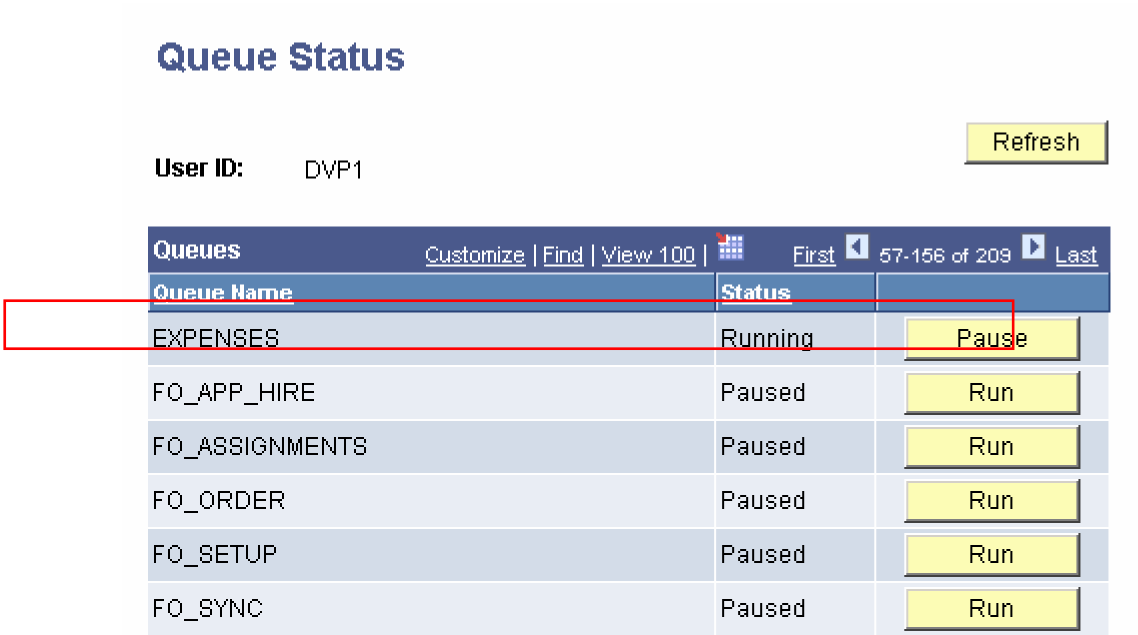


Routings page

Run Message Channel

1. Navigation: PeopleTools > Integration Broker > Service Operations Monitor> Administration > Queue Status

2. Verify that the status for Queue Name *EXPENSES* is *Running.* If it is *Paused*, click the **Run** button.



Queue Status page

Task 8-2: Configure Employee Portal Servlet URL

This step configures the URL for the Employee Portal Servlet (EMP_SERVLET).

1. Navigate to PeopleTools > Utilities > Administration > URLs.

2. Search for *EMP_SERVLET*.

3. Set the URL to your machine's server name and append it with */psp/employeeportaldomain/* as shown in the Comments section of the example.

4. Save.

URL Maintenance page

CHAPTER 9

INSTALLING PEOPLESOFT ENTERPRISE 9.0 MOBILE TIME AND EXPENSE

This document provides additional instructions to install PeopleSoft Enterprise Mobile Time and Expense.

The PeopleSoft Mobile Time and Expense application enables you to enter expense data without network and database connection. You can use that normally unproductive time spent in transit from one location to another to record time and track expenses.

This installation section covers the generation of "SyncIDs". Synchronization IDs are unique sequence numbers assigned to each row within a database table.

Note. Installing Mobile Time and Expense or Mobile Time and Expense for Windows CE requires that you first set up PeopleSoft Enterprise Travel and Expense Application on the PeopleSoft Internet Architecture. In addition, PeopleSoft Sync Server Gateway and PeopleSoft Mobile Agent need to be set up.

Note. For installation instructions for the Sync Server Gateway and Mobile Agent, please refer to PeopleTools 8.48 Installation Guide – Appendix C PeopleTools Mobile Agent and Configuring the Web Server section.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 9-1	Generating the SyncIDs for PeopleSoft Mobile Time and Expense

Task 9-1: Generating the SyncIDs for PeopleSoft Mobile Time and Expense

To generate SyncIDs for the Mobile Time and Expense Application:

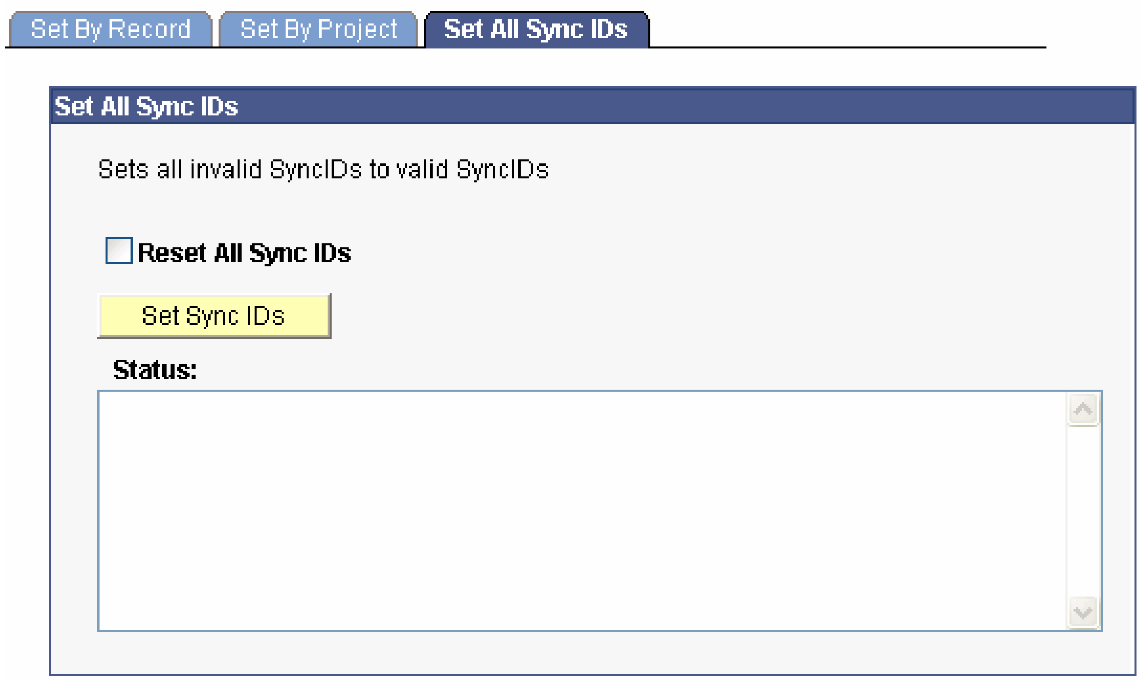
1. Log onto PeopleSoft Travel and Expense Application through the PeopleSoft Internet Architecture.

2. There are two ways of generating SyncIDs: Set Sync IDs or Set Sync ID process (via the Process Scheduler). If there is a large volume of data, it is highly recommended that the Set Sync ID process be selected. You can schedule this job to run over night. For smaller data volume or to Set Sync IDs immediately, select the "Set Sync IDs" option.

Set Sync IDs (Real-Time Process)

a) To access Set Sync Ids, navigate to: PeopleTools, Utilities, Administration, Set Sync IDs.

The Set All Sync IDs page now displays:



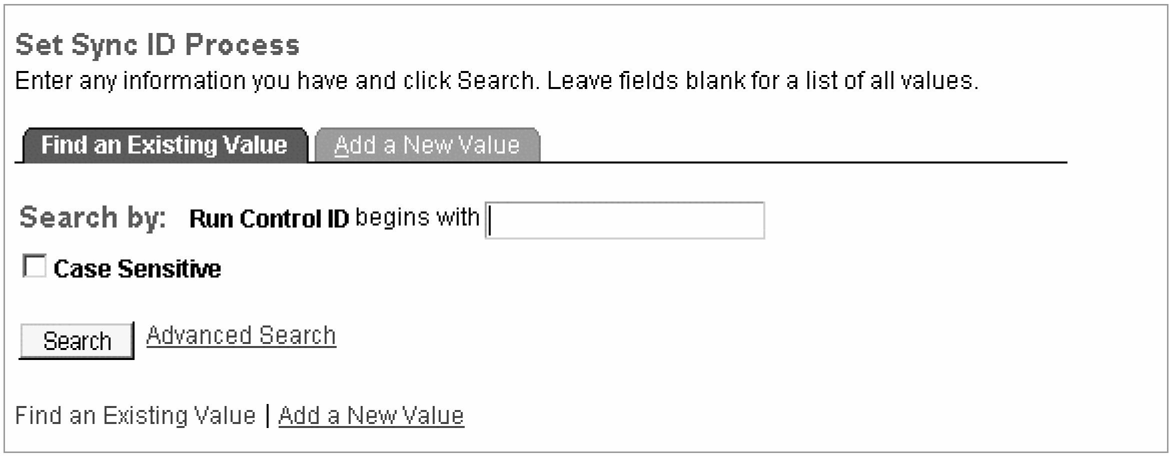
Set All Sync IDs page

b) Click the **Set Sync IDs** button. The system will automatically start generating Sync IDs for all Mobile related records.

Set Sync ID Process (Batch Process via the Process Scheduler)

a) To access the Set Sync ID Process, navigate to: PeopleTools, Utilities, Administration, Set Sync ID Process.

The following Run Control Search page appears:

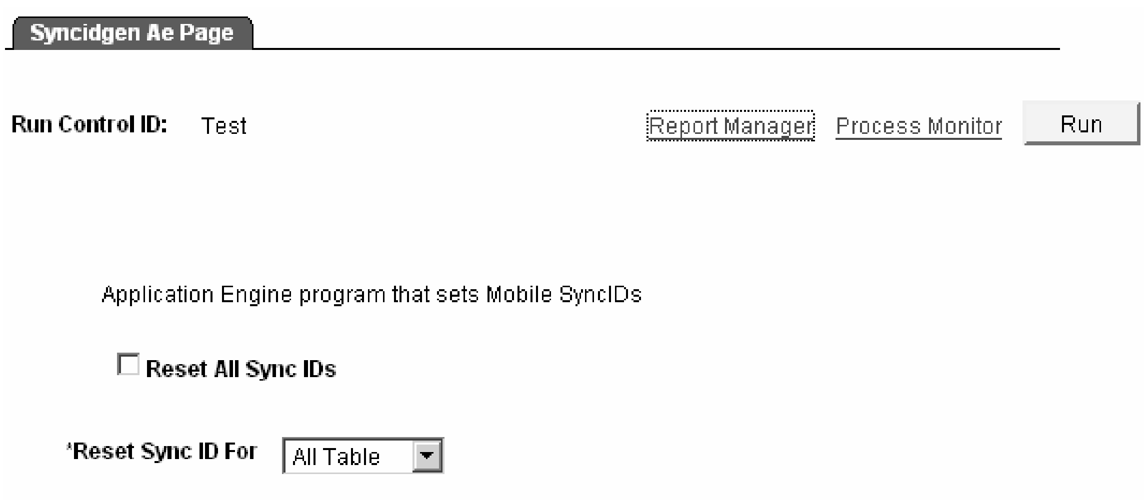


Set Sync ID Process page

b) Click the **Add a New Value** link and enter a Run Control ID.

c) Click the **Add** button.

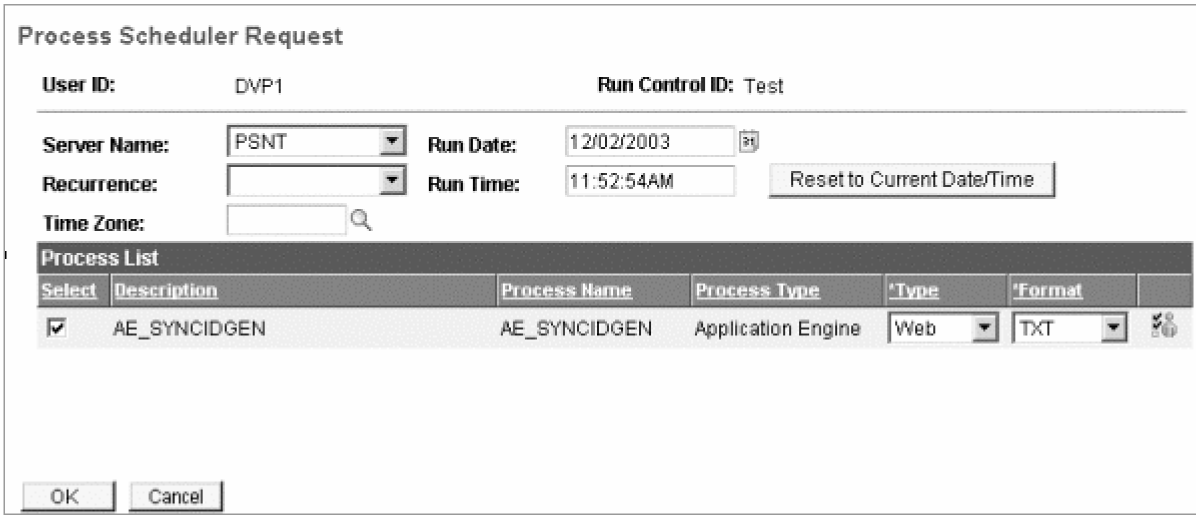
The following Run Control page appears:



Syncidgen Ae Page

d) Make sure that the **Reset Sync ID For** dropdown box has *All Table* selected. Click the **Run** button.

The following Run Control page appears:



Process Scheduler Request page

e) Click the **OK** button to start the batch job. To verify that the AE_SYNCIDGEN process has run successfully, view its progress using the Process Monitor.

CHAPTER 10

INSTALLING PEOPLESOFT ENTERPRISE 9.0 PAY/BILL MANAGEMENT

Task Overview

The following table summarizes the tasks in this document.

Task No.	Task Name
Task 10-1	Activating the Delivered Service Operations

Note: Pay/Bill Management is supported only on Microsoft SQL Server, Oracle and DB2/Unix.

Task 10-1: Activating the Delivered Service Operations

In this step, you activate service operations by running a sql script. Based on the contents of the FO_MESSAGES project, the script activates Service Operations, Routings, and Handlers, starts queues, and creates or activates Full Data Publish Rules.

To activate the delivered messages:

Note. FOR ORACLE CUSTOMERS ONLY: Please run the following statement against the FSCM 9.0 database using SQL*PLUS before running the following scripts: ALTER SESSION set NLS_Date_Format = 'YYYY-MM-DD'

1. Using a database query tool (iSQL, SQL*Plus, DB2 Command Window, etc.) log on to the FSCM database.

2. Open the SQL script <PS_HOME>\scripts**activate_all_fin.sql.**

3. Review and edit the script, following the instructions in the script.

4. Run the script.

Note. You must also install PeopleSoft Enterprise Pay/Bill Management 9.0 for HRMS before you can fully use the Pay/Bill Management application. This installation is delivered on a separate CD called: *PeopleSoft Enterprise Pay/Bill Management for HRMS 9.0*. The complete installation instructions for Pay/Bill Management for HRMS are posted in a separate document on Customer Connection. See *"PeopleSoft Enterprise Pay/Bill Management 9.0 for HRMS Installation Instructions"*.

CHAPTER 11

INSTALLING PEOPLESOFT ENTERPRISE 9.0 ESA AND FINANCIALS PORTAL PACKS

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 11-1	Grant Access to Navigation Pages
Task 11-2	Grant Access to Personalize the Portal Homepage
Task 11-3	Enabling Pagelet Creation and Access with Portal Utilities

Task 11-1: Grant Access to Navigation Pages

In order to access the Navigation Pages, security to the Navigation Page IScripts must be granted to all users. Using Data Mover, run the **EOPP_ADD_ROLE.DMS** script located in <PS_HOME>\scripts.

Note. When a new User ID is created, the EOPP_USER role should be added to the new User ID.

Task 11-2: Grant Access to Personalize the Portal Homepage

In order to add, remove or change the layout of the homepage, the homepage personalization security access must be granted to all non-guest users. To update the homepage personalization permission list, use Data Mover to run the **PORTAL_HP_PERS.DMS** script. To add the Portal User role to the user IDs, use

Data Mover to run the **PORTAL_ADD_ROLE.DMS** script. Both scripts are located in <PS_HOME>\scripts.

Note. The PAPP_USER role should be granted to all new User IDs for access to the Homepage personalization. After running this script, the role PAPP_USER should be manually removed from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 11-3: Enabling Pagelet Creation and Access with Portal Utilities

Use Data Mover to run the **EOPP_PORTAL_PACK.DMS** script located in <PS_HOME>\scripts. This script enables creating and viewing pagelets using the Enterprise Components Portal Utilities.

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

CHAPTER 12

INTEGRATING PEOPLESOFT ENTERPRISE 9.0 PROJECT COSTING & PROGRAM MANAGEMENT WITH MICROSOFT PROJECT 2002

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 12-1	Installing the PeopleSoft - Microsoft Project Integrator
Task 12-2	Configuring the PeopleSoft - Microsoft Project Integrator

The PeopleSoft - Microsoft Project Integrator is required for customers integrating PeopleSoft Project Costing and/or PeopleSoft Program Management with Microsoft Project 2002, (Windows 2000/Windows XP). It must be installed and running on each file server used as a point of integration.

Task 12-1: Installing the PeopleSoft - Microsoft Project Integrator

To install the project integrator:

1. Create a folder (**<MSP_HOME>**) for the MSP Integrator in the Windows machine that is dedicated as the Microsoft Project Integrator. For example: C:\MSP\

2. From your file server, copy the files in **<PS_HOME>/src/vb/msp** to the Windows machine that is dedicated as the Microsoft Project Integrator in **<MSP_HOME>** folder.

3. In order to register any missing ActiveX Controls in the Windows machine dedicated as the Microsoft Project Integrator, check the Windows installation directory (**<WINDOWS_INST>**), i.e. C:\WINNT\SYSTEM32, to see if the following OCXs exist:

    i. Richtx32.ocx

    ii. TABCTL32.OCX

    iii. MSINET.OCX

4. If you don not have the three OCXs listed above:

    a. Copy the three OCXs from **<PS_HOME>/src/vb/msp** to **<WINDOWS_INST>**.

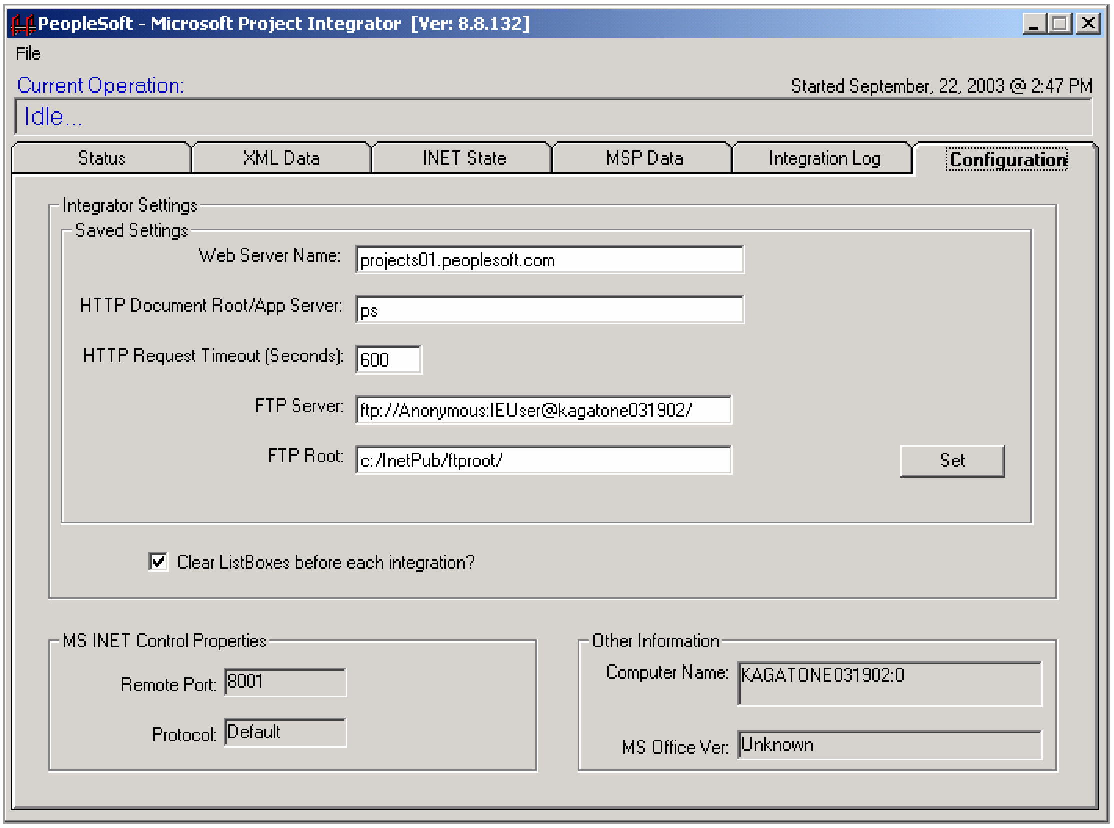
    b. Copy **regmsp.bat** from **<PS_HOME>/src/vb/msp** to **<WINDOWS_INST>**.

    c. Run **<WINDOWS_INST>/ regmsp.bat** to register the OCXs. For example,

```
C:\WINNT\SYSTEM32\regmsp.bat
```

Task 12-2: Configuring the PeopleSoft - Microsoft Project Integrator

Launch **<MSP_HOME>** /PC_MSP2.EXE to start the Microsoft Project Integrator application. Once the MSP Integrator is running, it must be configured for your environment. Click on the Configuration tab and enter values in the fields described below.



PeopleSoft/Microsoft Project Integrator - Configuration tab

Web Server Name: Enter the name of the web server.

HTTP Document Root/App Server: Enter the Application Server name.

If you are unsure, launch your browser and log into PeopleSoft. View the URL address.

URL Address

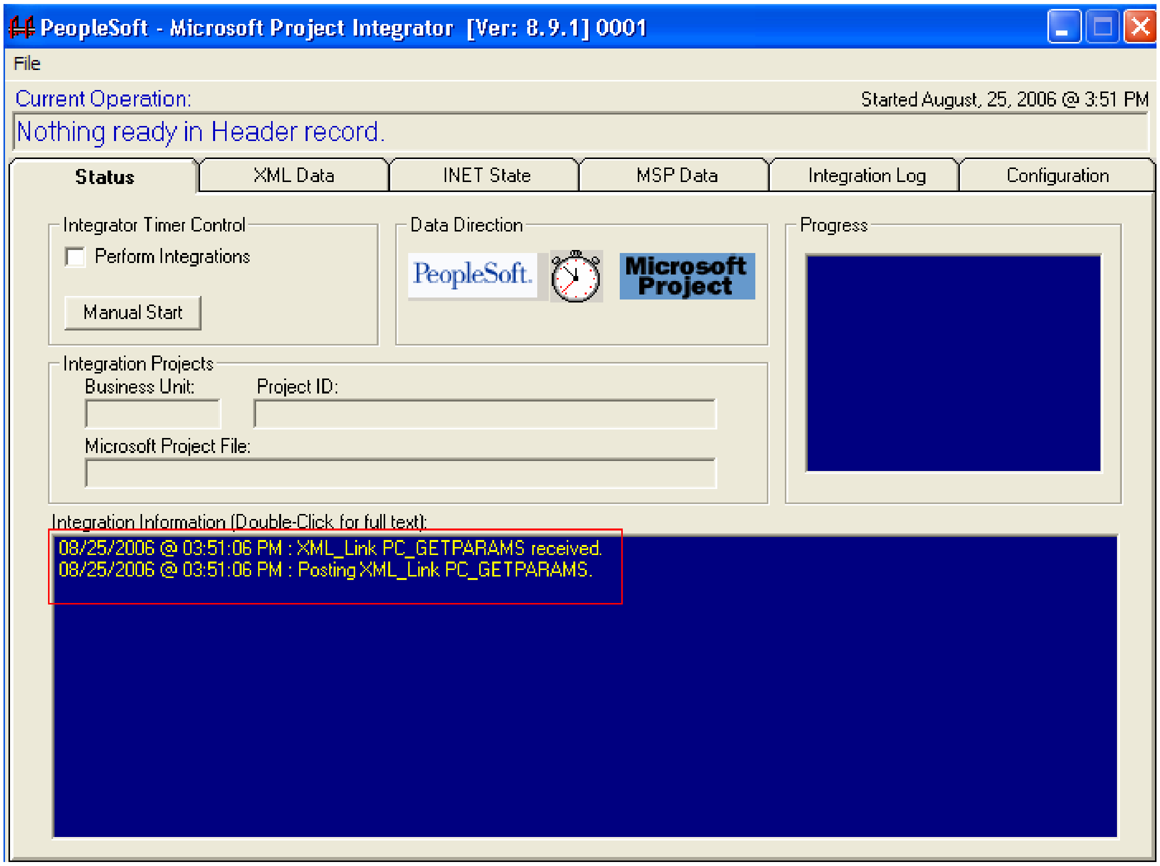
Use the URL to identify the Web server and Application Server.

In this example, **rt-ibm08.peoplesoft.com:6201** is entered as the Web Server Name and **e840r20ant** is entered as the HTTP Document Root/App Server.

FTP Server: Enter the FTP server that this integrator will use to direct the Application Server to send the .mpp files to integrate.

FTP Root: Enter the Windows file path to the root location of the FTP server. This is the file path used by Microsoft Project to find the .mpp files to integrate.

You can verify that the Integrator is running succesfully when you see a message like the one highlighted in the screenshot below:



Microsoft Project Integrator – Integration Information message

Note: If you receive the following error in the XML Data tab the first time that you run the integrator:

10.5.1 500 Internal Server Error. The server encountered an unexpected condition which prevented it from fulfilling the request.

Open a browser and run the following URL:

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

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

Then run the integrator again.

To launch project integrator upon start up:

Create a shortcut to PC_MSP2.EXE in the server's Startup folder to ensure its initiation upon start up.

Note. PeopleSoft/Microsoft Project Integrators must be installed on a machine configured with Microsoft Project 2002. It is important that a user not use this machine for any other purpose. The Integrator supports Windows Terminal Server meaning that one machine may be used to run multiple Integrators.

CHAPTER 13

DEFINING AN FTP SERVER FOR FILE ATTACHMENTS IN PEOPLESOFT ENTERPRISE 9.0 PROJECT COSTING

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 13-1	Defining an FTP Server for Project and Activity File Attachments

Task 13-1: Defining an FTP Server for Project and Activity File Attachments

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

To store file attachments on the database:

Select the database file attachment option on the Installation Options - Project Costing page. To access the Installation Options - Project Costing page, navigate to Set Up Financials/Supply Chain, Install, Installation Options, Project Costing. The database file attachment option appears in the File Attachment Option group box. Project Costing delivers the PC_PROJECTS_DB_ATTACHMENT URL. No additional step is required to set up this method for file attachments.

To store file attachments on a file server:

1. Ensure that the FTP server has adequate disk storage to store the project and activity documents.

2. Access the PC_PROJECTS_DOC_ATTACHMENT URL on the PeopleTools Utility URL Maintenance page at PeopleTools, Utilities, Administration, URLs. Project Costing delivers this URL.

3. Enter the URL path to the designated FTP server in this format: ftp://<userID>:<password>@<machinename>.

   a) Enter the <userID> of the user account under which all users connect to the FTP server for adding, updating, viewing, and deleting documents.

   b) Enter the <password> that is associated with the user account under which all users connect to the FTP server.

   c) Enter the <machine name> by which the FTP server is physically identified on the network. If you create an optional directory for document storage on the server, include the directory name when citing the path. You can also store attachments in the root directory of the FTP server.

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

4. On the Installation Options - Project Costing page at Set Up Financials/Supply Chain, Install, Installation Options, Project Costing, select the *File Server* file attachment option and enter the home directory where the attachment files will be stored.

See the “Using PeopleTools Utilities” chapter in the *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration* for information on the URL Maintenance page.

See the “Setting Installation Options for PeopleSoft Applications” chapter in the *PeopleSoft 9.0 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook* for information on the Installation Options - Project Costing page.

C H A P T E R 1 4

INSTALLING PEOPLESOFT ENTERPRISE 9.0 STAFFING FRONT OFFICE

Note. Staffing Front Office is only supported on Microsoft SQL Server, Oracle and DB2/Unix.

Task Overview

The following table summarizes the tasks in this document.

Task No.	Task Name
Task 14-1	Setting Up Document Attachments
Task 14-2	Setting Up the Verity Search Engine (optional)

Task 14-1: Setting Up Document Attachments

In Peoplesoft Staffing Front Office 9.0, we use the standard attachments functionality. This functionality is used in many components by multiple Peoplesoft products.

If you are planning to use file attachments for Applicants, Employees, Orders, Assignments, Customers or Contacts then you need to set up an FTP server under:

Set Up Financials/Supply Chain > Common Definitions > File Attachments > Administer File Attachments.

Attachments to PeopleSoft Staffing Front Office Orders and Assignments are stored and retrieved from the server locations defined here. System administrators can configure one or more servers to store attachments. These servers can be FTP servers or database servers.

Using this page, system administrators can set up new servers and identify the active server. Administrators can add or modify the FTP root folder for FTP servers.

Pick Active Server	Select the server ID of the active (or default) server where all newly created attachments are stored. You can switch the active server at any time. All previously created attachments are still retrieved from the server where they originally were stored. The attachments keep a reference to the original server. This field is required.
Add FTP Server (add file transfer protocol server)	Click to insert a new row in the grid to define a new FTP server for attachments.
Add Database Server	*This is not applicable for Staffing Front Office attachments.*
ID	Displays the system-assigned ID number for each server on this page. When an attachment is stored to the server, the server ID is inserted into the attachment record. When you request to download (view) this attachment, the system retrieves it from the original server based on the server ID.
Type	Identifies the type of server based on whether you click the Add FTP Server button or the Add Database Server button. Once you have saved the row and exited the component, you cannot change the server type. Values are: • *FTP* (file transfer protocol server). • *DB* (database server). *Only FTP server is supported for Staffing Front Office attachments.*
Login	Enter or change the login name. This is required for FTP servers only.
Password	Enter or change the password corresponding to the Login Name. The password is required for FTP servers only.
Server/Record Name	Enter the machine name for the FTP server. Once you save the information, change the machine name only if the same FTP server is renamed. To add a different FTP server, click the Add FTP Server button to insert a new row into the grid and define the new server. You cannot delete servers because attachments could already be stored on them.
Path	Enter the subdirectory path under the server's FTP root where all attachments are to be stored. This is required for FTP servers only.

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

Component Subdirectories

This is ***not*** applicable for Staffing Front Office attachments.

Task 14-2: Setting Up the Verity Search Engine (optional)

Peoplesoft Staffing Front Office 9.0 utilizes the Verity Search Engine to address its search needs. The Verity Search Engine is a common functionality between Staffing and Resource Management.

If you are planning to use any of the search functionality in Peoplesoft Staffing Front Office 9.0, you need to set up your Search Configuration under:

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Search Configuration

For more details, see section 'Setting Up the Verity Search Engine and Resource Matching Process' in the *Resource Management 9.0 PeopleBook*.

C H A P T E R 1 5

Installing PeopleSoft Enterprise 9.0 Transaction Billing Processor

The following instructions describe how to install PeopleSoft Enterprise 9.0 Transaction Billing Processor. The Transaction Billing Processor is an add-on project that is applied to the PeopleSoft FSCM 9.0 database for integration with the PeopleSoft CRM 9.0 database. Before applying the Transaction Billing Processor, make sure you have completed the following tasks:

- Installed PeopleTools 8.48.
- Installed the Financials 9.0 Database.
- Setup an Application Server and Web Server for the Financials 9.0 Database.
- Setup the Pub/Sub Domains and activate the domains on the Servers.
- Identify the Integration Gateways to be used for respective database and Load the Gateway connectors.
- Identify the Nodes within the respective databases that are going to be used for Sending and Receiving Integration Messages.
- Ensure that the identified nodes are setup as trusted nodes within each other.

Task Overview

The following table summarizes the tasks in this document.

Task No.	Task Name
Task 15-1	Turn On the Integration Queues (Channels) and Activate
Task 15-2	Turn On the Integration Service Operations (Messages) and Routings and Activate
Task 15-3	Setup Transformation for Contract Transaction Services.

Task 15-1: Turn On the Integration Queues (Channels) and Activate

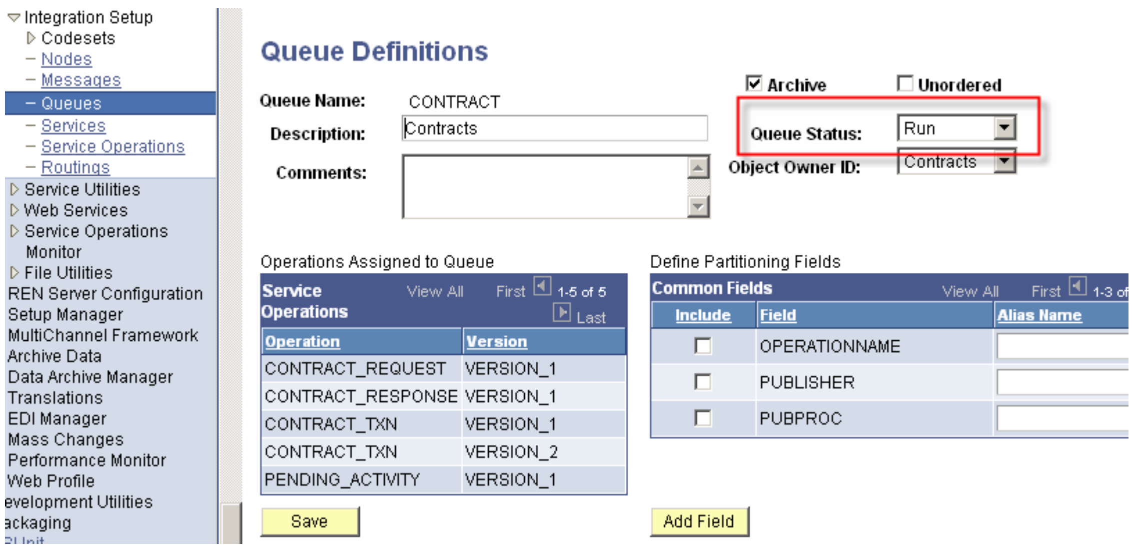
To Turn on the integration queues:

1. Log onto the PeopleSoft Internet Application (PIA) in the Internet browser.

2. Navigate to PeopleTools → Integration Broker → Integration Setup → Queues → Queue Name: *CONTRACT*.

3. Set the Queue Status field to *Run*.

4. Save the Queue.



Queue Definitions page

Task 15-2: Turn On the Integration Service Operations (Messages) and Routings and Activate

There are four service operations that you will need to activate.

- CONTRACT_REQUEST (Asynchronous)
- CONTRACT_RESPONSE (Asynchronous)
- CONTRACT_TXN (VERSION_2) (Asynchronous)
- PENDING_ACTIVITY (Synchronous)

For each of these service operations, PeopleSoft delivers routings. For example, Peoplesoft delivers a routing named CONTRACT_REQUEST for the service operation CONTRACT_REQUEST with the default Sender node as PSFT_CR and the default Receiver node as PSFT_EP.

However, Sender and Receiver nodes are editable ONLY when the routing is being newly created. Once created and saved, you cannot modify the Sender and Receiver nodes.

Therefore, new routings may need to be created in order to edit your Sender and Receiver nodes. Multiple routing instances can be created with different names for the same service operation. In the case detailed in the steps below CONTRACT_REQUEST is one instance and CONTRACT_REQUEST1 is another instance.

There are three ways that you can configure your nodes since the PeopleSoft delivered routings have already been created and the Nodes are not editable:

- Configure the nodes PSFT_CR and PSFT_EP with the valid databases so that the Sender Node PSFT_CR and Receiver Node PSFT_EP are valid and functional.
- Create a NEW routing instance of the service operation with a *different name* (CONTRACT_REQUEST1 as shown in the steps below) and then supply the proper Sender and Receiver nodes (which is prerequisite listed at the start).

> **Note.** Creating a new routing instance of the service operation with a different name is the method that is detailed in the steps below. If you use one of the other methods, verify the correct Routings are active by navigating to PeopleTools → Integration Broker → Integration Setup → Services. Open each Service Operation and click on the Routings tab to see their status.

- Delete the Peoplesoft supplied Routing (CONTRACT_REQUEST) and then create a new instance of the Service operation.

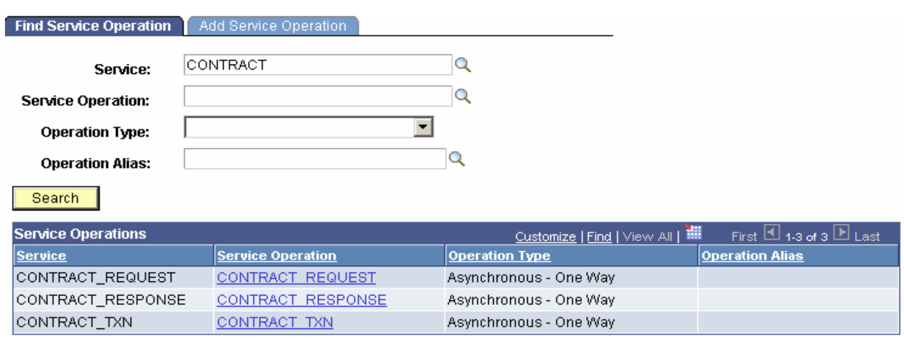
To activate the service operations (messages):

1. Log onto the PeopleSoft Internet Application (PIA) in the Internet browser.

   There are *two* ways that you can choose to open a Service Operation to Activate:

   a) By way of directly opening a Service Operation.

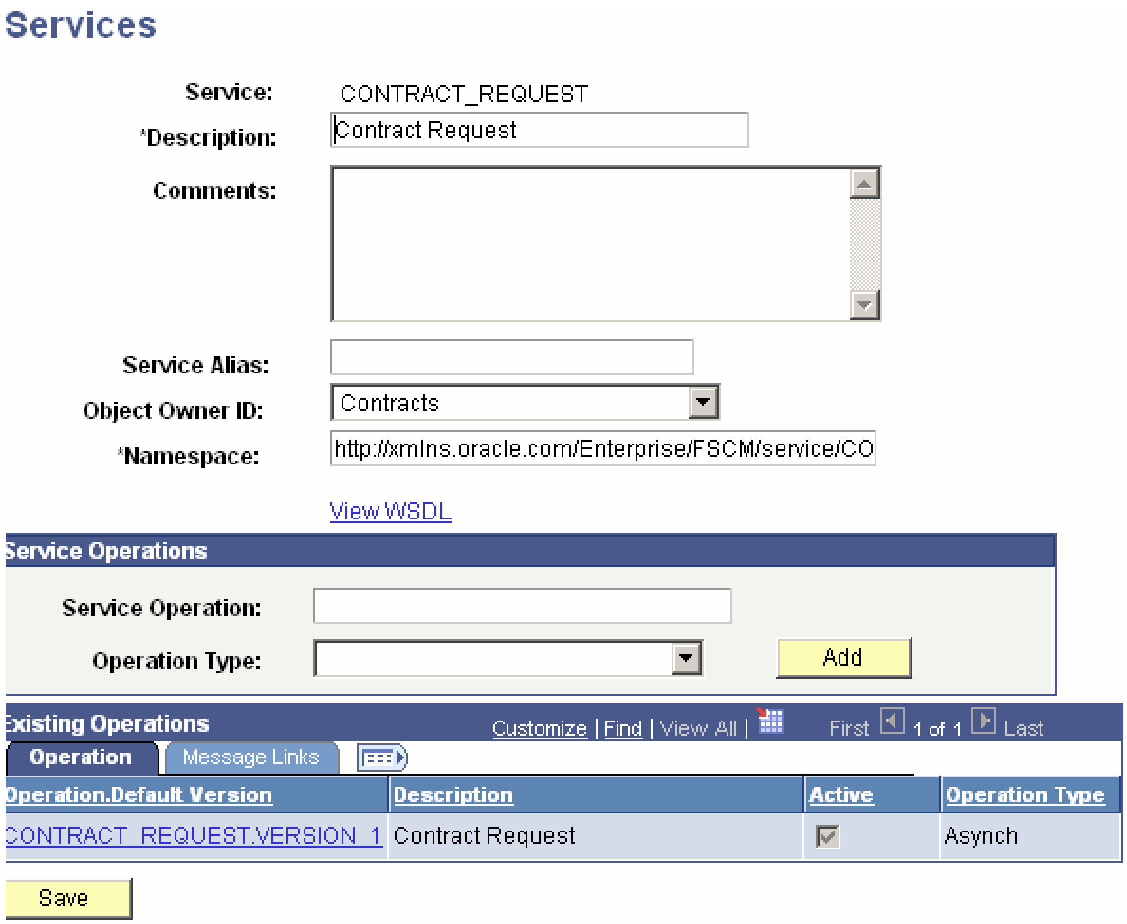
   Navigate to PeopleTools → Integration Broker → Integration Setup → Service Operations. You can choose to filter through the Service Name or Service Operation: CONTRACT_REQUEST.



Field Service Operation page

b) By way of opening a Service and then its corresponding Service Operation. Each Service has a corresponding Peoplesoft delivered Service Operation. For each of the Service Operations listed above you can open the Service that has the same name.

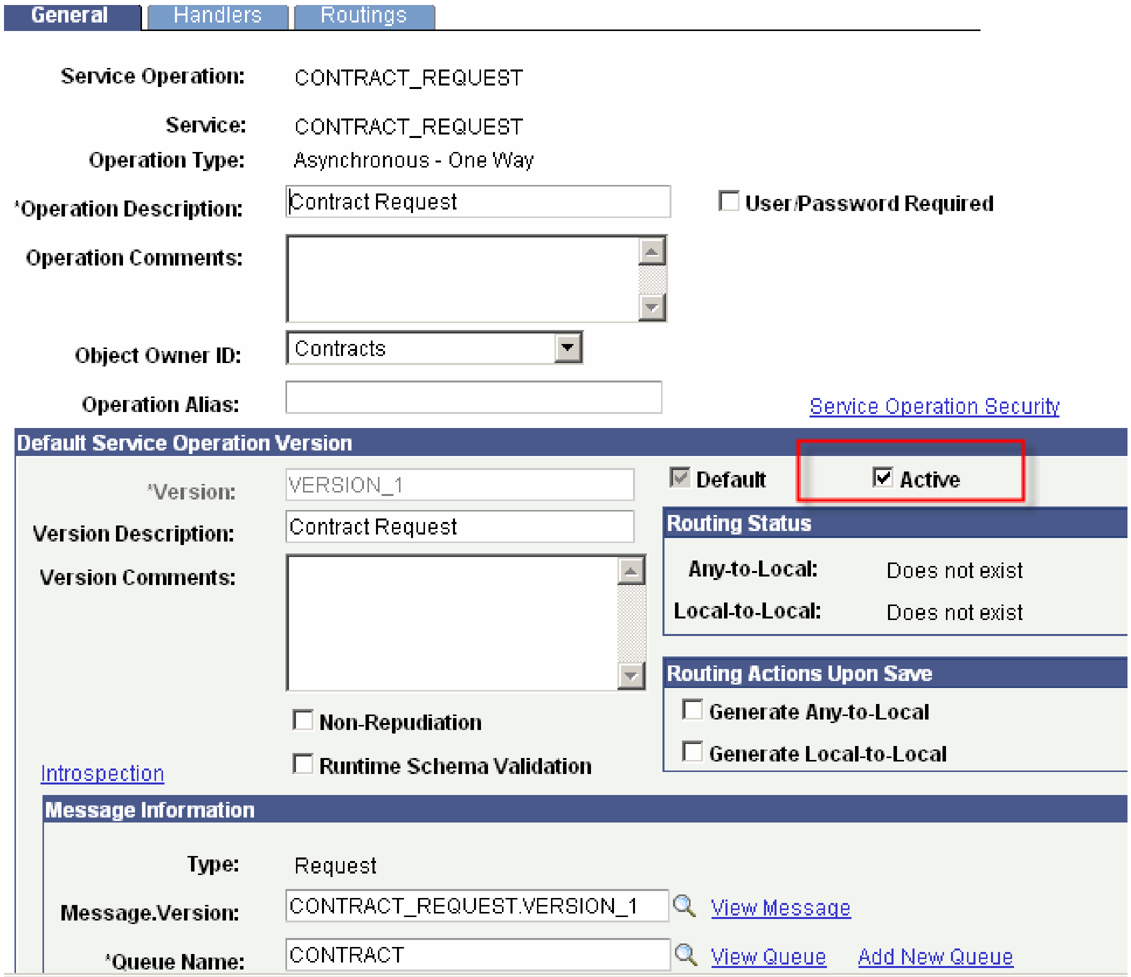
Navigate to PeopleTools → Integration Broker → Integration Setup → Services → Service Name: CONTRACT_REQUEST.



Services page

Click the **CONTRACT_REQUEST.VERSION_1** link in the Operation tab of the Existing Operations grid that lists the Default Version. This link will open the Service Operation.

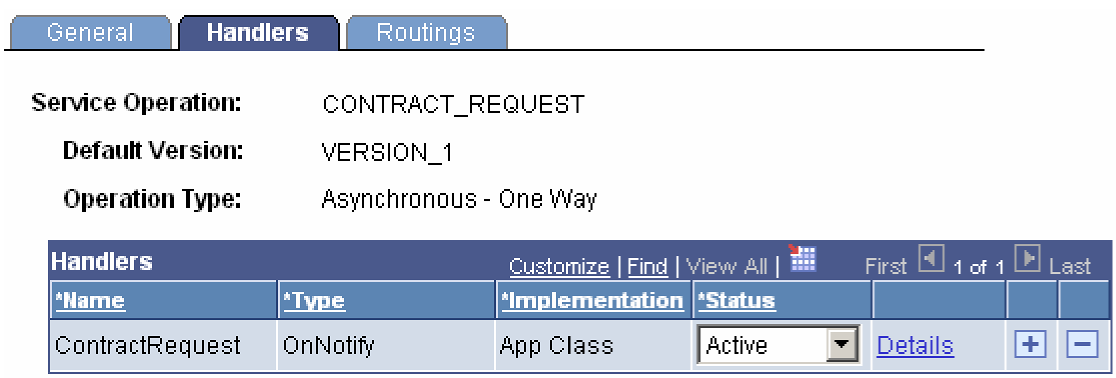
2. Once a Service Operation has been opened by either of the two ways above, you can now activate and configure the same. On the General tab, select the **Active** check box to set the Service Operation to active and save the page.



General tab

3. On the Handlers tab, if there are any handlers, set the **Status** field to *Active*. In the example below, the status has been set to *Active* for the handler name *ContractRequest.*

Note. CONTRACT_REQUEST and CONTRACT_TXN have handlers defined in FSCM for Contracts.



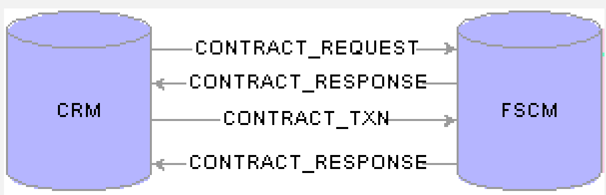
Handlers tab

4. On the Routings tab, enter a value in the Routing Name field such as CONTRACT_REQUEST and click the Add button to add a routing.

5. Configure the new Routing Definition as follows:

   a) Select the **Active** check box.

   b) Enter the correct Sender Node.

> **Note.** As a prerequisite, the user must know which databases are being integrated. In the example of CONTRACT_REQUEST, the sender node will be the CRM database and the receiver node will be the Financials database. The receiver node is always the target database. In the case of CONTRACT_RESPONSE, the receiver node is the CRM database. The service operations (messages) flow as follows: CRM sends CONTRACT_REQUEST to Financials, Financials send CONTRACT_RESPONSE to CRM, CRM sends CONTRACT_TXN to Financials, and Financials sends PENDING_ACTIVITY to CRM.
>
> 
>
>
> **Note.** If the node fields are grayed out and unavailable for edit, you can create a new routing and configure it with the Nodes that you are configuring.

   c) Enter the correct Receiver Node.

   d) Enter the correct Object OwnerID if applicable.

> **Note.** In the Financials database, the Object Owner ID is always Contracts.

   e) Click **Save.**

Routing Definitions page

Perform these steps for the following service operations (messages):

- CONTRACT_RESPONSE
- CONTRACT_TXN (VERSION_2)
- PENDING_ACTIVITY

Task 15-3: Set up Transformation for Contract Transaction Service

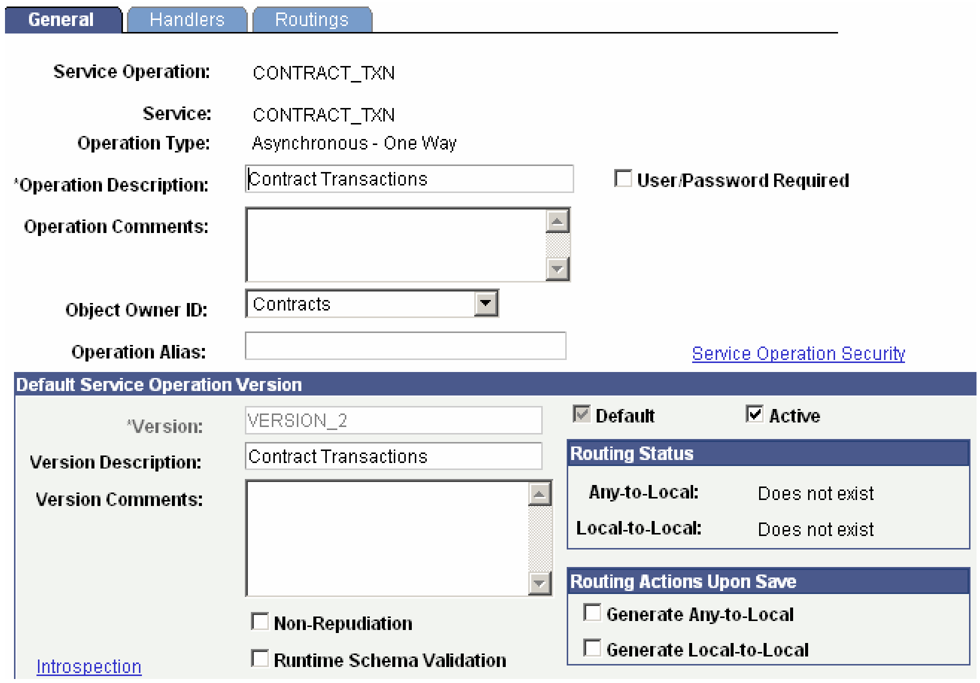
PeopleSoft Enterprise Contracts in FSCM uses CONTRACT_TXN version 2 for all the processing related to Transaction Billing Processor. CRM uses CONTRACT_TXN version 1. The default version is version 1 in CRM whereas it is version 2 in FSCM. Due to the difference in the versions of the same message there is a need to set up *Transformation* of incoming message version 1 from CRM to version 2 in FSCM.

1. You need to open the CONTRACT_TXN Service Operation (Message) properties and activate the non-Default version 1 of the message (you have already activated the Default Version 2 in earlier steps). Both versions must be active in order for the transformation to work correctly. The necessary required steps are as follows:

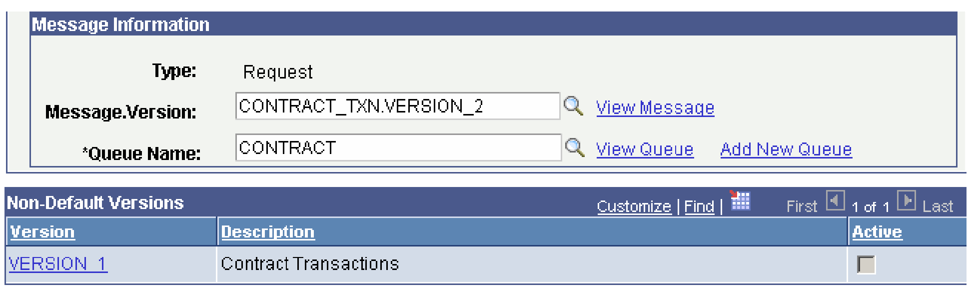
   a) Open PeopleTools → Integration Broker → Integration Setup → Service Operation → Service Name: CONTRACT_TXN.

   b) You can also choose to open the Service Operation by opening the Services by opening PeopleTools → Integration Broker → Integration Setup → Services → Service Name:

CONTRACT_TXN. You will then have to click the **CONTRACT_TXN.VERSION_2** link in the Operation tab of the Existing Operations grid. This will open the Service operation CONTRACT_TXN as below.

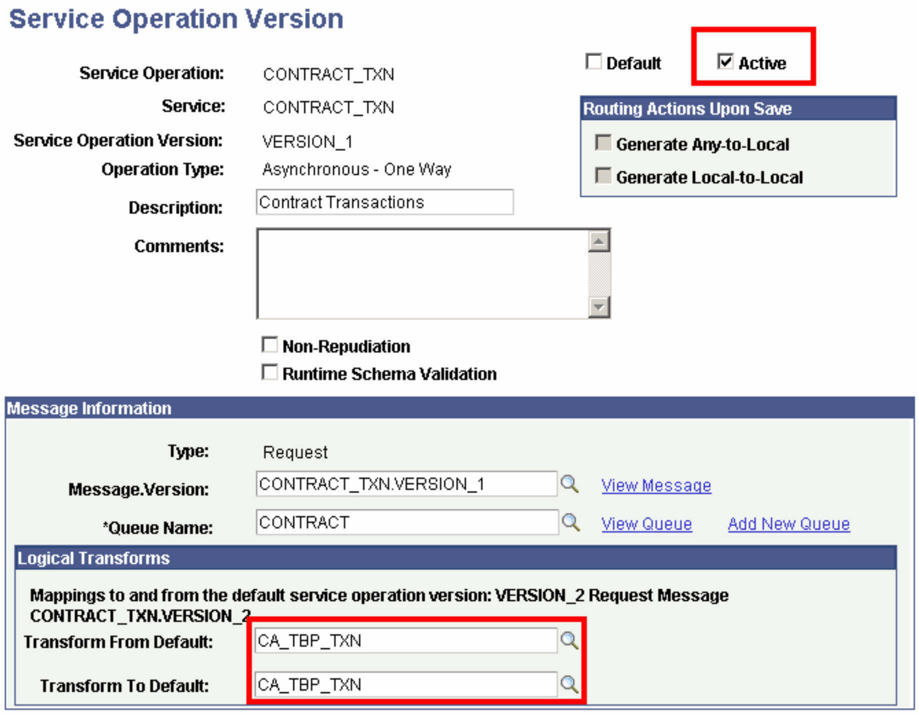


General tab (page 1 of 2)



General tab (page 2 of 2)

c) Click the **VERSION_1** link listed in the Non-Default Versions grid to open the Non-Default Version – VERSION_1 of the CONTRACT_TXN and enter the values as shown.



Service Operation Version page

d) Activate the Service Operation by selecting the **Active** check box.

e) Save the page.

2. Edit the routing parameters as follows:

a) On the Routings tab, select the routing link that you added or activated in the previous task.

b) Select the Parameters tab.

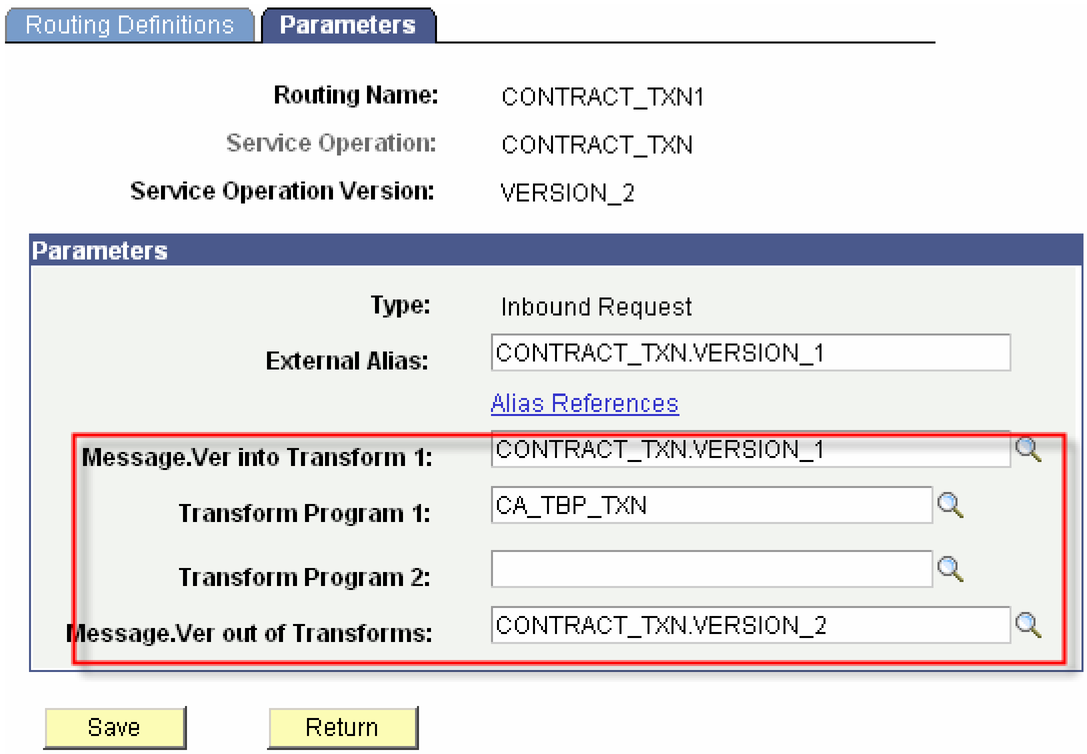
c) Select the Application Engine name *CA_TBP_TXN* for Transform Program 1.

d) Enter the External Alias with the name of *CONTRACT_TXN.VERSION_1*.

e) Enter *CONTRACT_TXN.VERSION_1* into the Message.Ver into Transform 1 field.

f) Enter *CONTRACT_TXN.VERSION_2* into the Message.Ver out of Transforms field.

g) Click **Save.**



Routing Definitions – Parameters page

Note.	Clear the Application Server and Web Server cache before using the system.
Note.	The installation of PeopleSoft Enterprise Transaction Billing Processor 9.0 for FMS is now complete.

CHAPTER 16

INTEGRATING PEOPLESOFT ENTERPRISE 9.0 MAINTENANCE MANAGEMENT WITH MICROSOFT PROJECT

This procedure describes the installation to integrate PeopleSoft Enterprise Maintenance Management with Microsoft Project 2002. The integration software requires that you have previously installed and configured the following items:

- You must have a process scheduler server set up on a windows machine (Windows 2000) to run against the PeopleSoft Enterprise 9.0 Maintenance Management database. The integration with Microsoft Project 2002 uses a PeopleSoft process scheduler server to communicate with Microsoft Project 2002.
- The Microsoft Project 2002 Software has to be installed on the process scheduler server.

Task Overview

The following table lists the tasks required for integrating PeopleSoft Maintenance Management with Microsoft Project 2002. They are arranged in the sequence that they must be performed.

Task No.	Task Name
Task 16-1	Installing PeopleTools process scheduler on a windows machine
Task 16-2	Installing Microsoft Project 2002
Task 16-3	Configuring the MS project integration process

Task 16-1: Installing PeopleTools process scheduler on a windows machine

Follow the standard installation instruction to install PeopleTools on the windows machine (Windows 2000) and configure it as a process scheduler to connect to the PeopleSoft Enterprise 9.0 Financial database where the Maintenance Management product resides.

Task 16-2: Installing Microsoft Project 2002

Install Microsoft Project 2002 on the same windows machine where process scheduler server is installed.

Task 16-3: Configuring the MS project integration process

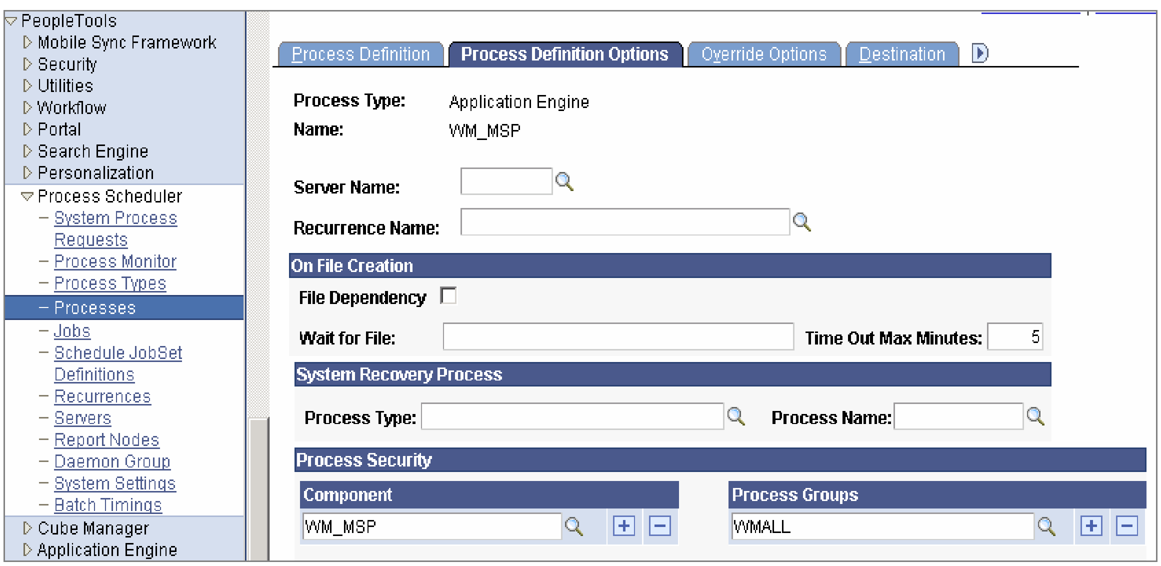
From the PeopleSoft Home page, click PeopleTools > Process Scheduler > Processes:

1. On the process search page, Select Search by Process name, and enter **WM_MSP** in the text box.

2. Click **Search** and select **WM_MSP.** The Process Definition page appears. Click the **Process Definition Options** Tab.

3. In the Server Name text box, enter the name of the process scheduler configured in Task 1.

4. Save the change.



Process Definition - Process Definition Options page

CHAPTER 17

INTEGRATING PEOPLESOFT ENTERPRISE 9.0 ASSET MANAGEMENT WITH ECENTERONE SPACE MANAGEMENT SOLUTION (OPTIONAL)

Peoplesoft 9.0 Asset Management integrates with CenterStone Software's eCenterOne Space Management solution, which provides the following functionality:

- Maintain floor plans, import CAD drawings into CAFM.
- Design and maintain layout space in CAFM.
- Assign resources or employees to spaces.
- Manage occupancy and vacancy rate in CAFM.
- Analyze capacity and forecast capacity needs in CAFM.

This is an optional integration and in Release 9.0 the Asset Management is integrated with eCenterOne, a 3rd party vendor, CenterStone Software's Space Management Solution.

Customers integrating with eCenterOne need to purchase Licensing directly from CenterStone, before the proceeding further with this installation.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 17-1	Installing Target Connector for CenterStone
Task 17-2	Local Gateway Configuration
Task 17-3	Configure ECENTERONETARGET Connector Properties
Task 17-4	Run Message Channel
Task 17-5	Activate Domain for Asynchronous Messaging
Task 17-6	Activate Routings, Service Operations, and Update Routings Properties
Task 17-7	Test eCenterOne node
Task 17-8	Restart Web and App Server
Task 17-9	Activate the Space Management Install Option
Task 17-10	Verify the Integration

Task 17-1: Installing Target Connector for CenterStone

The following are the connector files that are required to integrate with Centerstone.

- eCenterOneTargetConnector.class
- insert-email.xslt
- soap.jar

Download the above connector files from http://www.centerstonesoft.com/integration.

> **Note.** If you are encountering problems accessing the URL or locating, downloading the files, please contact CenterStone support at **508.435.1510, option 4**. For all other issues contact Oracle Customer Support.

To install the target connector for CenterStone:

1. Copy the Files e***CenterOneTargetConnector.class*** and ***soap.jar*** to the following directory:

   ```
   <YOUR_INSTALLATION_ROOT>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\classes\com\peoplesoft\pt\integrationgateway\targetconnector
   ```

2. Copy file soap***.jar*** to the following directory:

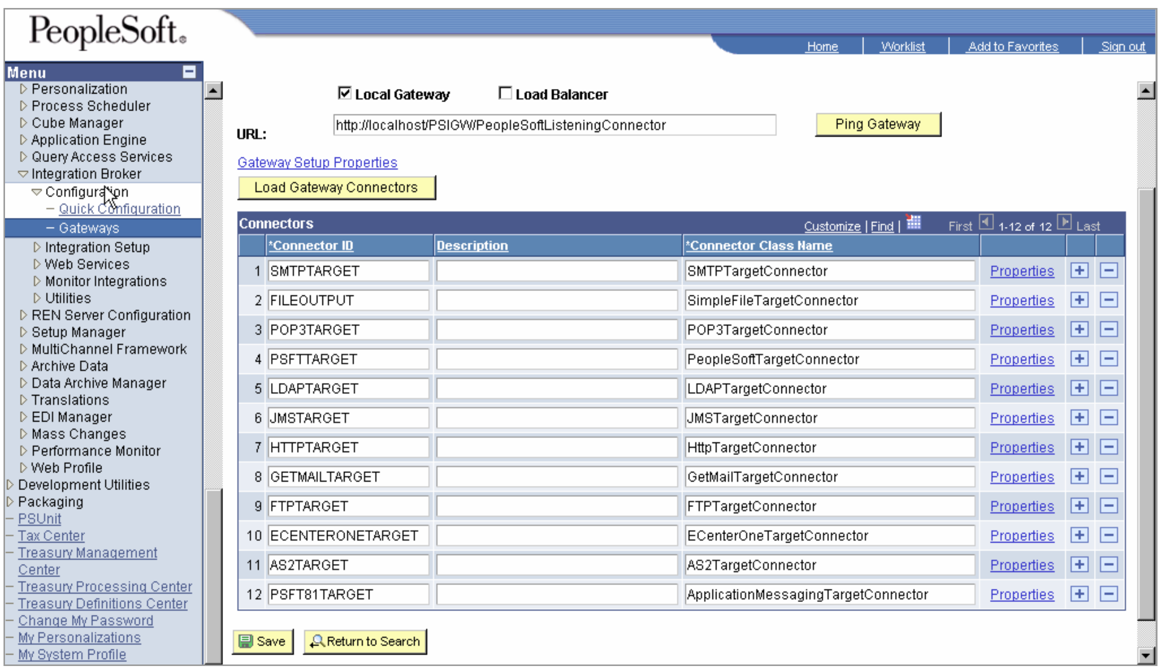
   ```
   <YOUR_INSTALLATION_ROOT>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\lib
   ```

3. After copying the above files, restart the web server.

Task 17-2: Local Gateway Configuration

To configure the local gateway:

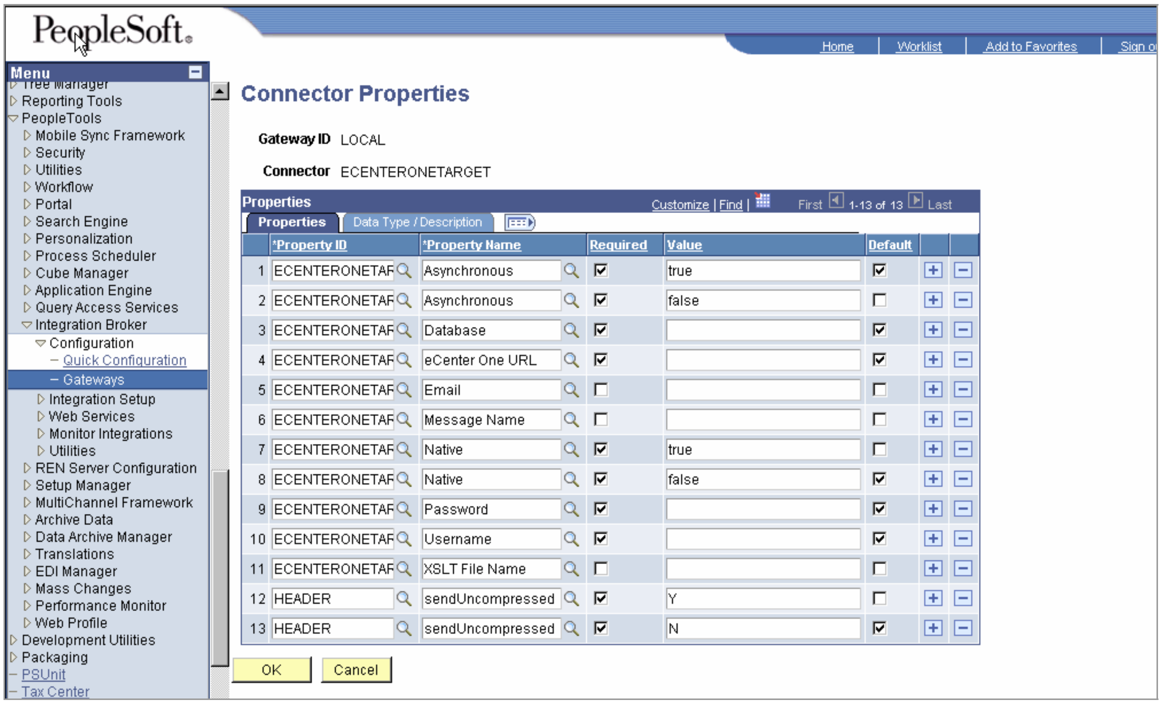
1. Navigate to PeopleTools→Integration Broker→Configuration→Gateways.
2. Click **Search.** The system automatically prompts you to the Local gateway.
3. Change the URL to *http://<WEBSRV>/PSIGW/PeopleSoftListeningConnector*.
4. Click **Save!**
5. Click **Load Gateway Connectors.** This ensures that all the existing connectors get installed on the gateway.
6. Make sure that one of the connectors is *ECENTERONETARGET.*
7. Click **Save** again. This will install the connectors.



Gateways page

Task 17-3: Configure ECENTERONETARGET Connector Properties

Configure the eCenterOne Connector Properties to enable Messaging to the eCenterOne Server.



Connector Properties page

To configure ECENTERONETARGET connector properties:

1. Select the Connector Properties and update the Value field for the following Property Names.

PropertyID	Property Name	Description
ECENTERONETARGET	Database	Target eCenterOne Database Name
ECENTERONETARGET	Email	Email Address for Notifications from CenterStone
ECENTERONETARGET	eCenter One URL	eCenterOne Server URL
ECENTERONETARGET	Password	eCenterOne Server Password
ECENTERONETARGET	Username	eCenterOne Server Username

2. Save.

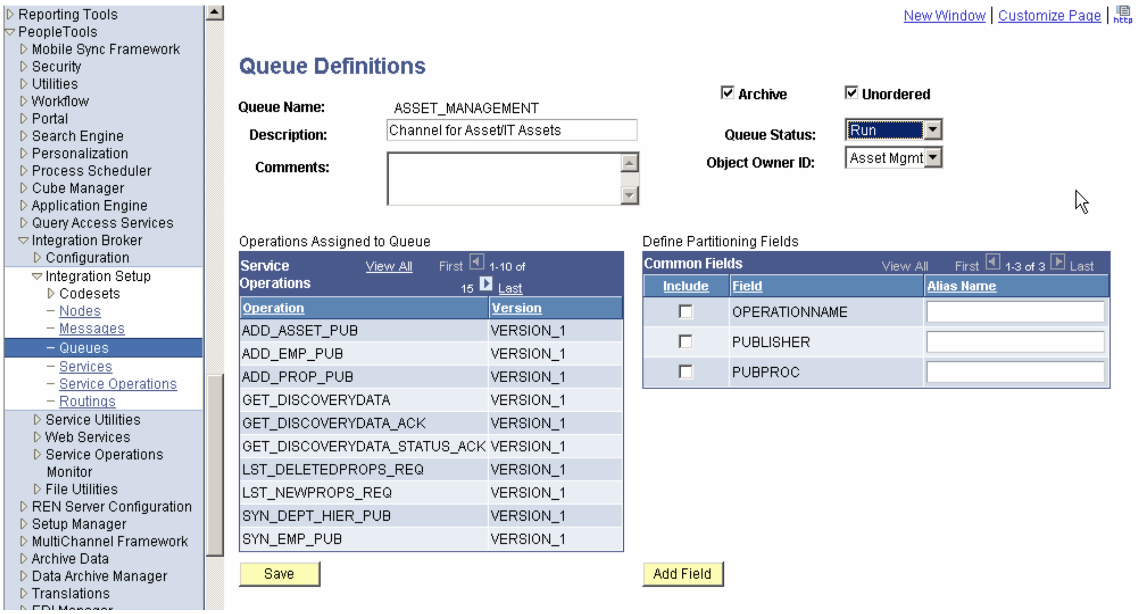
Task 17-4: Run Message Channel

To run the message channel:

1. Navigate to PeopleTools→Integration Broker→Integration Setup→Monitor MessageQueues.

2. Search for the *ASSET_MANAGEMENT* Message Channel and make sure that it is running.

3. If it has a status of *Paused*, click the **Run** button.

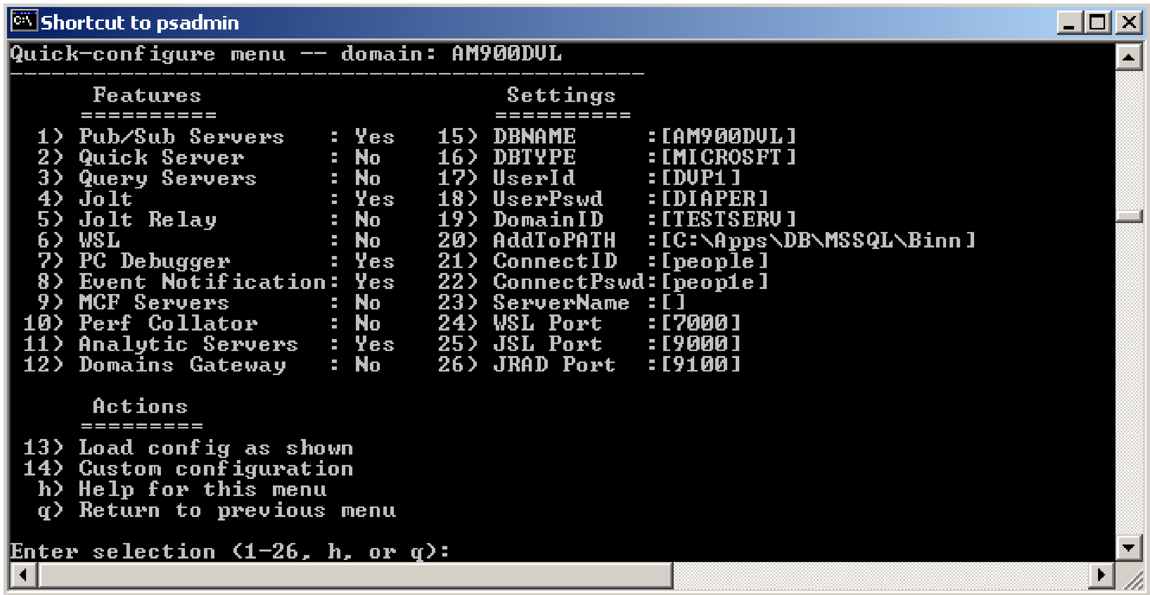


Queue Definitions page

Task 17-5: Activate Domain for Asynchronous Messaging

Asynchronous message handling in PeopleSoft is different from synchronous message handling. In the asynchronous mode, a message is dumped in a queue and a message handler then picks up the message and gives it to the message dispatcher. The dispatcher then delivers the message to the target node. To enable the message handler and dispatcher, make sure that your domain has publish/subscribe servers configured in psadmin.

Make Pub/Sub servers set to Yes as shown below.



Note. Psadmin configuration is used to support asynchronous messaging, after starting your app server you will see two new processes one for Message Handler, and one for message dispatcher.

After configuring your app server, you need to activate your domain through PIA to ensure Handler and Dispatcher pick up your asynchronous messages.

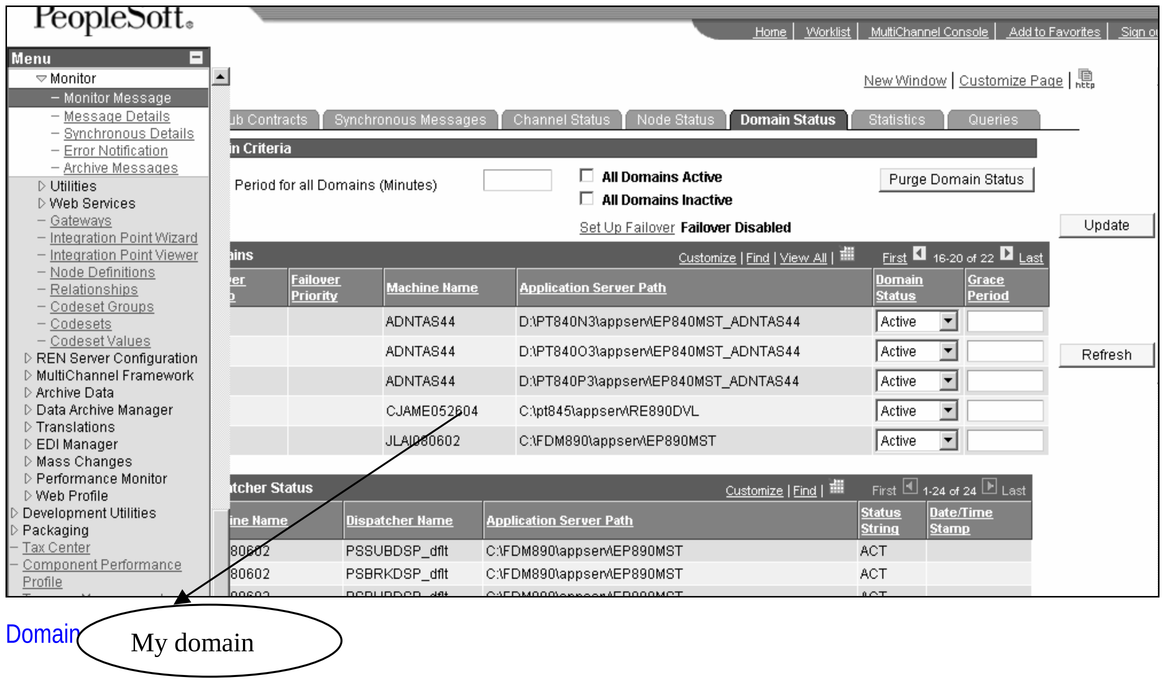
To activate your domain:

1. Select the Connector Properties and update the **Value** field for the following Property Names.

2. Navigate to PeopleTools → Integration Broker → Service Operations Monitor → Monitor MessageAdministration → Domain Status.

3. Click the Domain Status tab.

4. Search for your domain and make the **Domain Status** field *Active.* Notice that in the figure below, my domain is distinguished through my machine name.



Task 17-6: Activate Routings, Service Operations, and Update Transaction Routings Properties

Note. FOR ORACLE CUSTOMERS ONLY: Please run the following statement against the FSCM 9.0 database using SQL*PLUS before running the following scripts: ALTER SESSION set NLS_Date_Format = 'YYYY-MM-DD'

1. Using a database query tool (iSQL, SQL*Plus, DB2 Command Window, etc.) log onto the target FSCM database.

2. Run the following scripts from the Scripts directory under the folder where the Asset Management FSCM CD was installed.

Note. Please edit the following scripts before running them.

AM_CAFM_IB_UPDATE.SQL Edit the entries in the above SQL file and update the values between delimiters << and >> in **single quotes**.

<<URL>>

<<DATABASE>>

<<USERNAME>>

<<PASSWORD>>

Centerstone Inc should provide the Above Properties, when eCenterOne Software is purchased.

Example:

```
Update PSRTNGDFNCONPRP set PROPVALUE = 'http://centerstone3.ecenterone.com' where
PROPNAME = 'eCenter One URL' and ROUTINGDEFNNAME IN (select ROUTINGDEFNNAME from
PSIBRTNGDEFN where RECEIVERNODENAME = 'PSFT_XOUTBND' and IB_OPERATIONNAME IN
('ADD_EMP_PUB','ADD_PROP_PUB','SYN_DEPT_HIER_PUB','SYN_EMP_PUB','UPD_EMP_PUB','UPD_PR
OPID_PUB','LST_DELETEDPROPS_REQ','LST_NEWPROPS_REQ','UPD_EMPLOC_REQ','UPD_PROP_REQ'))
;
```

Task 17-7: Test eCenterOne node

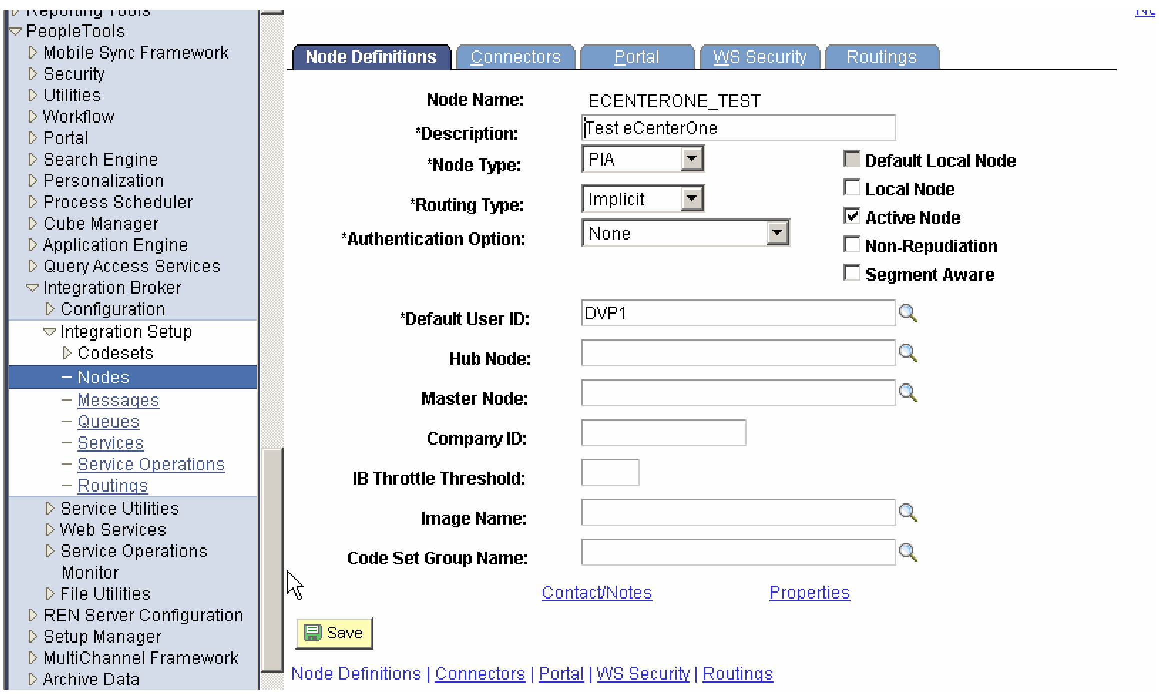
Create an eCenterOne test node and ping to make sure the connection properties are good.

To test eCenterOne node:

1. Navigate to PeopleTools→Integration Broker→Integration Setup→Nodes.

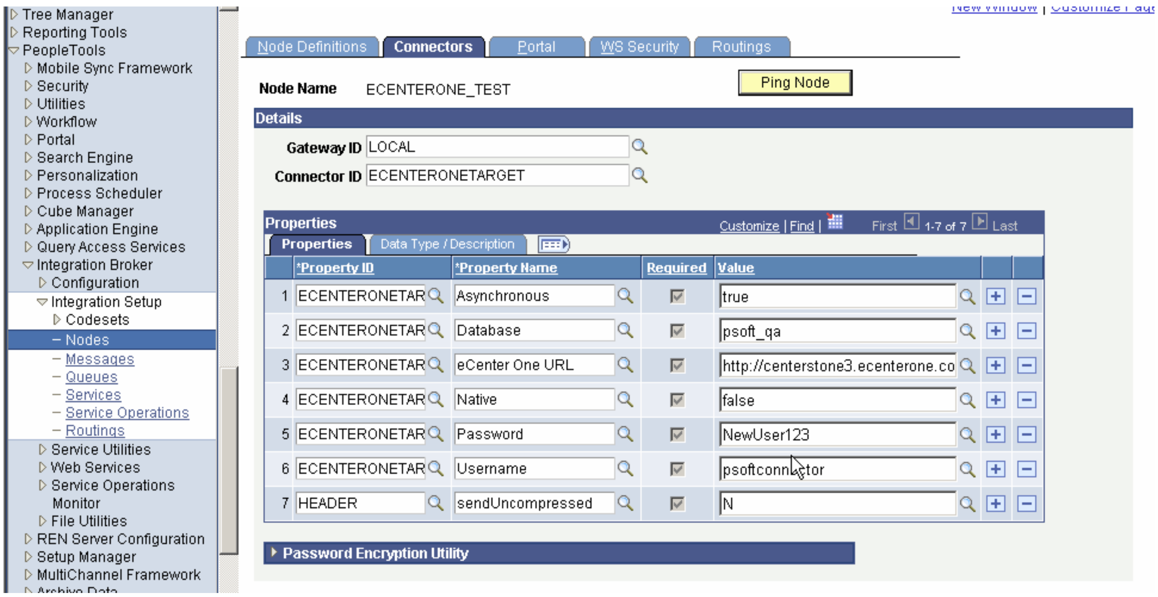
2. Add a new test node ex: *ECENTERONE_TEST*.

3. Enter values in the **Description** and **Default User Id** fields on the Node Definitions tab.



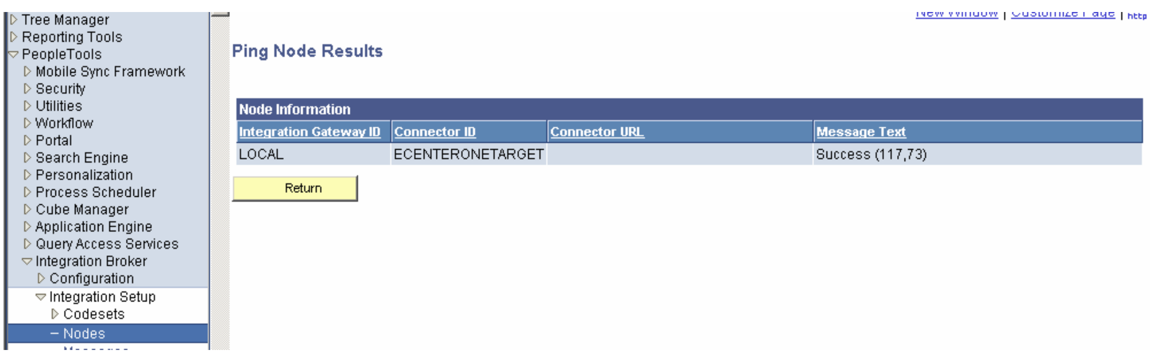
Node Definitions page

4. Go to the Connectors tab and select *ECENTERONETARGET* in the Connector Id field.



Connectors tab

5. Save and ping the node to make sure that it is successful. The Message Text will show *Success*.



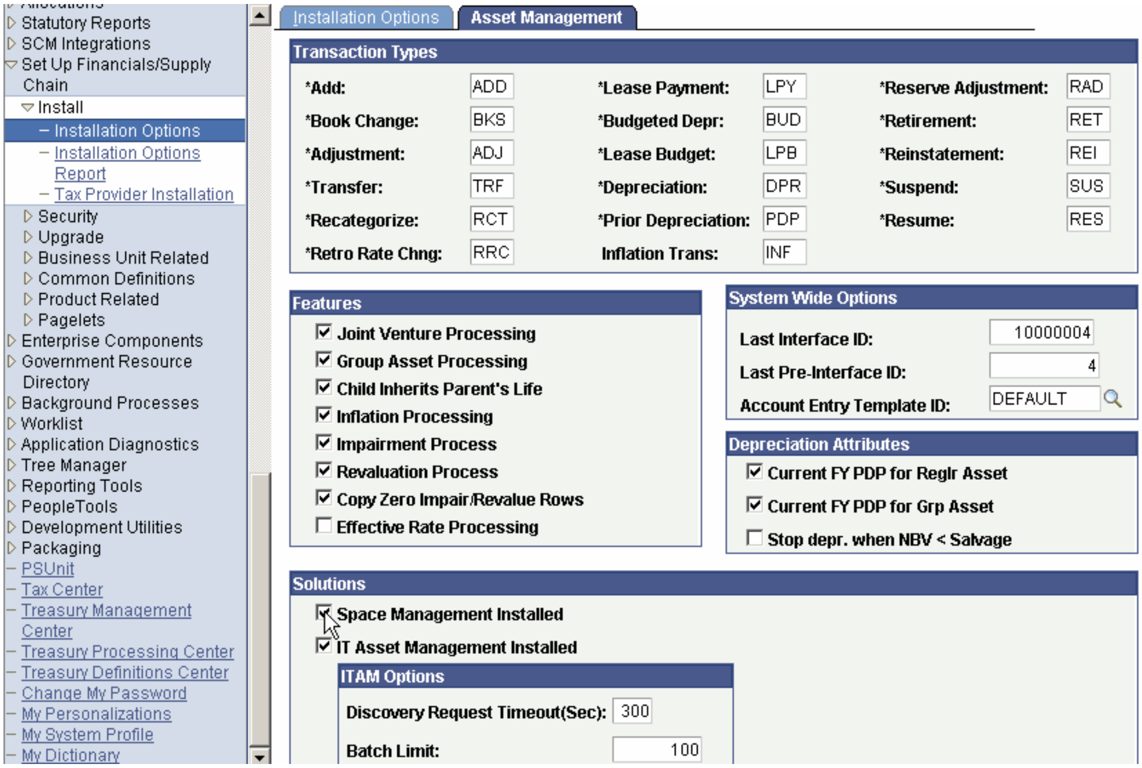
Ping Node Results page

Task 17-8: Restart Web and Appserver

Shut down the Appserver and Webserver and restart them.

Task 17-9: Activate the Space Management Install Option

Select the check box for **Space Management Installed** as shown in the page below:



Installation Options – Asset Management page

Task 17-10: Verify the Integration

Verify Node Definitions

To verify the node definitions:

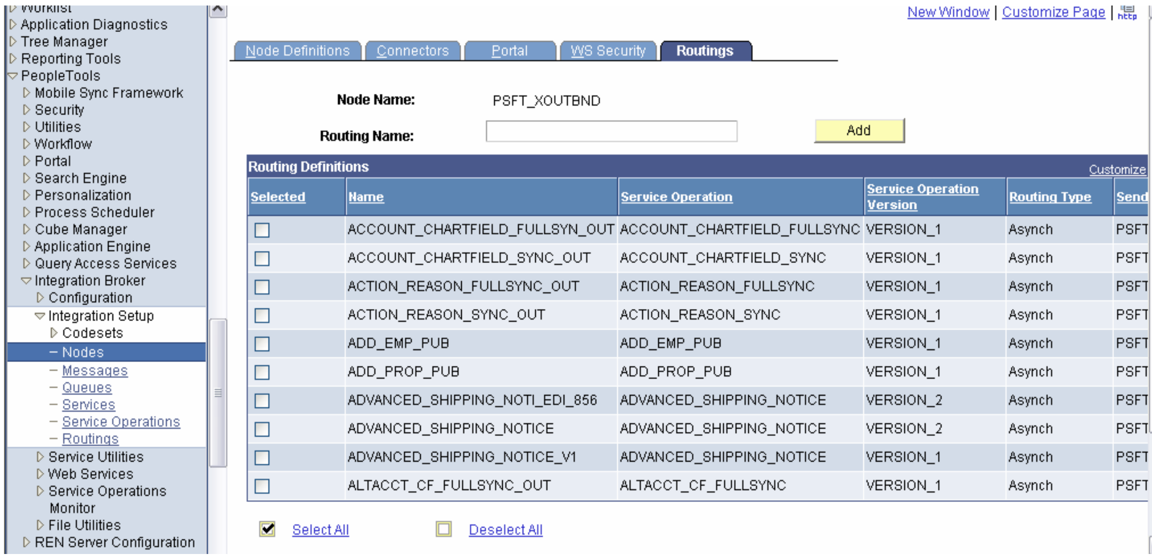
1. From the main menu, click **People Tools.**

2. Click **Integration Broker.**

3. Click **Integration Setup.**

4. Click **Nodes** and enter the search criteria *PSFT_XOUTBND*

5. Click the Routings tab.

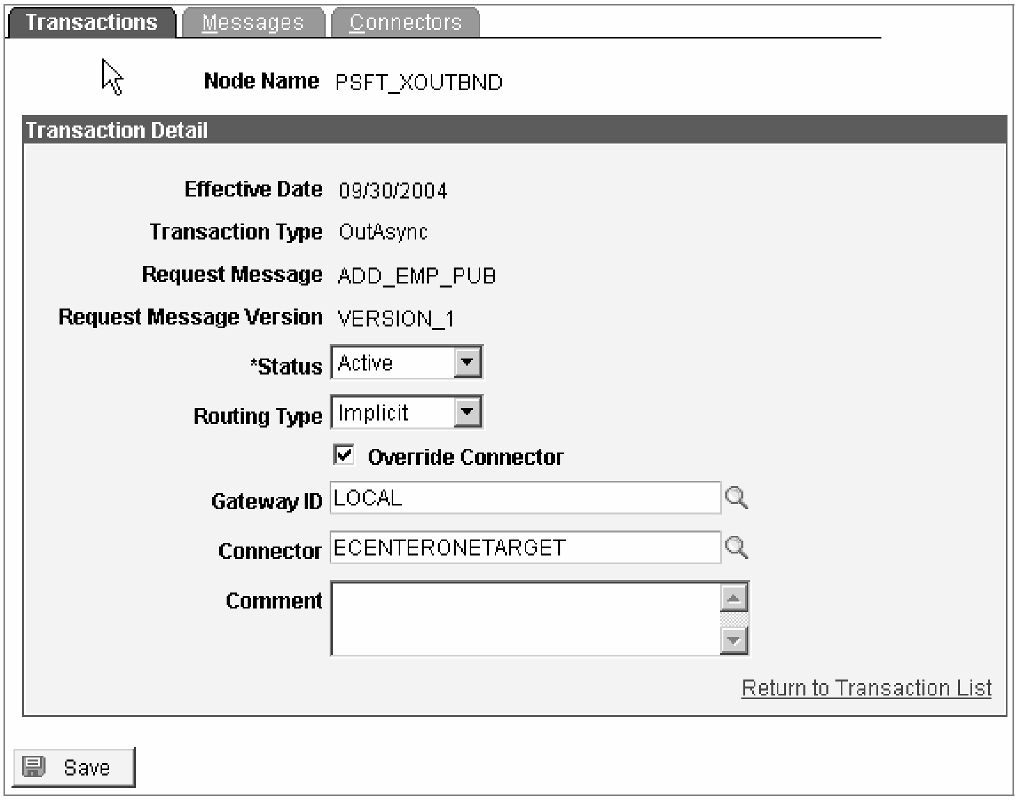


Routings tab

6. Verify that there are routings defined for the PSFT_XOUTBND Node for the following messages:

- ADD_EMP_PUB
- ADD_PROP_PUB
- SYNC_DEPT_HIER_PUB
- SYN_EMP_PUB
- UPD_EMP_PUB
- UPD_PROPID_PUB
- LST_DELETEDPROPS_REQ
- LST_NEWPROPS_REQ
- UPD_EMPLOC_REQ
- UPD_PROP_REQ

For each Routing, click the **Detail** link. Verify that the details are correct.



Transactions page

Verify Service Operations

To verify the service operations:

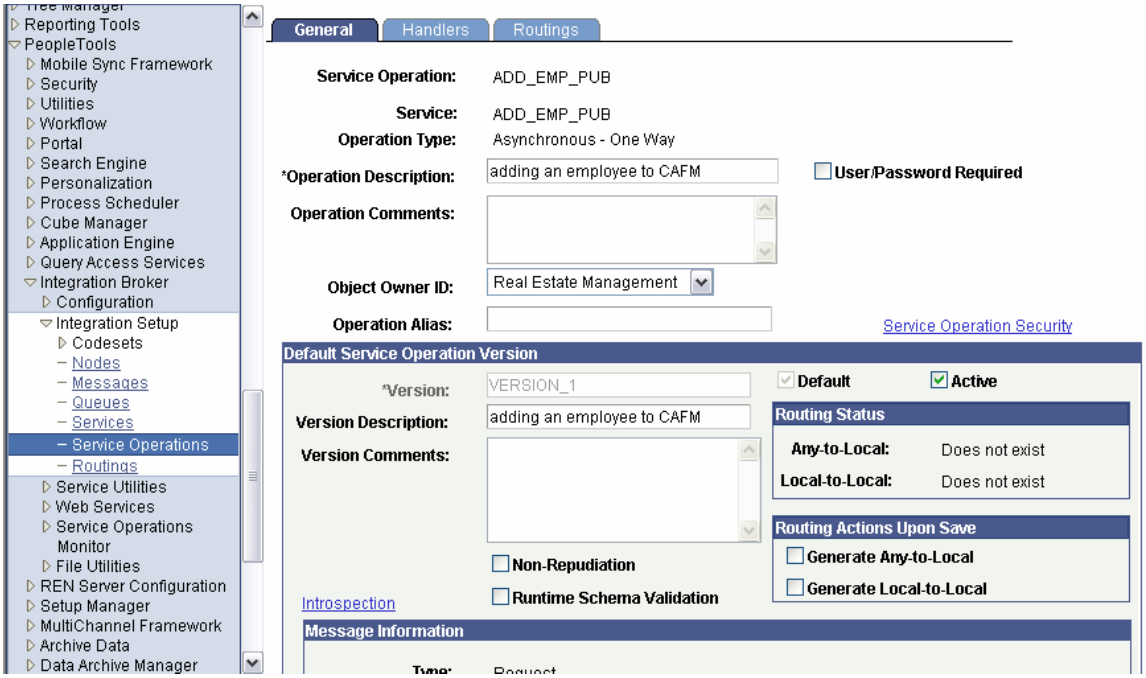
1. From the main menu, click **People Tools.**

2. Click **Integration Broker.**

3. Click **Integration Setup.**

4. Click **Service Operations.**

5. Enter *ADD_EMP_PUB* in the search criteria. Verify that the details are correct. Verify that the details are correct for all other service operations also.



Service Operations – General page

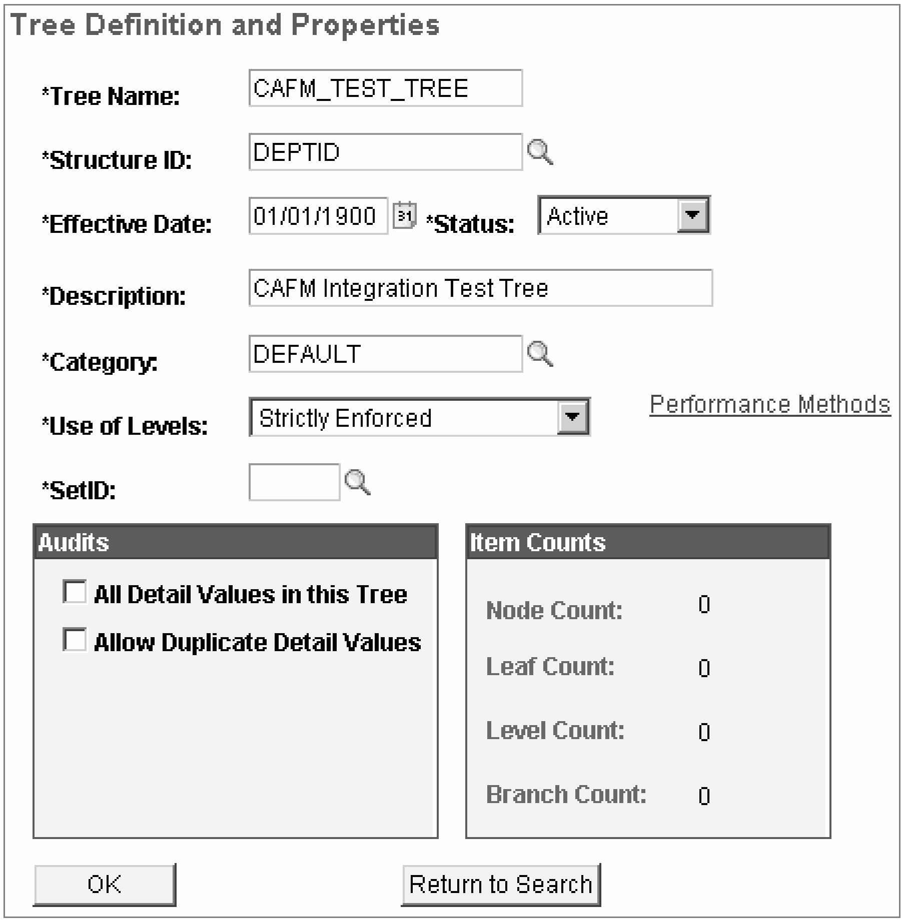
Test the Department Publish Message

To test the department publish message:

1. From the main menu, select Tree Manager → Tree Manager.

2. Create a new test tree in order to verify the message. Click the Create New Tree tab and then enter a suitable name (e.g. CAFM_TEST_TREE).

3. Enter *DEPTID* in the **Structure ID** field.



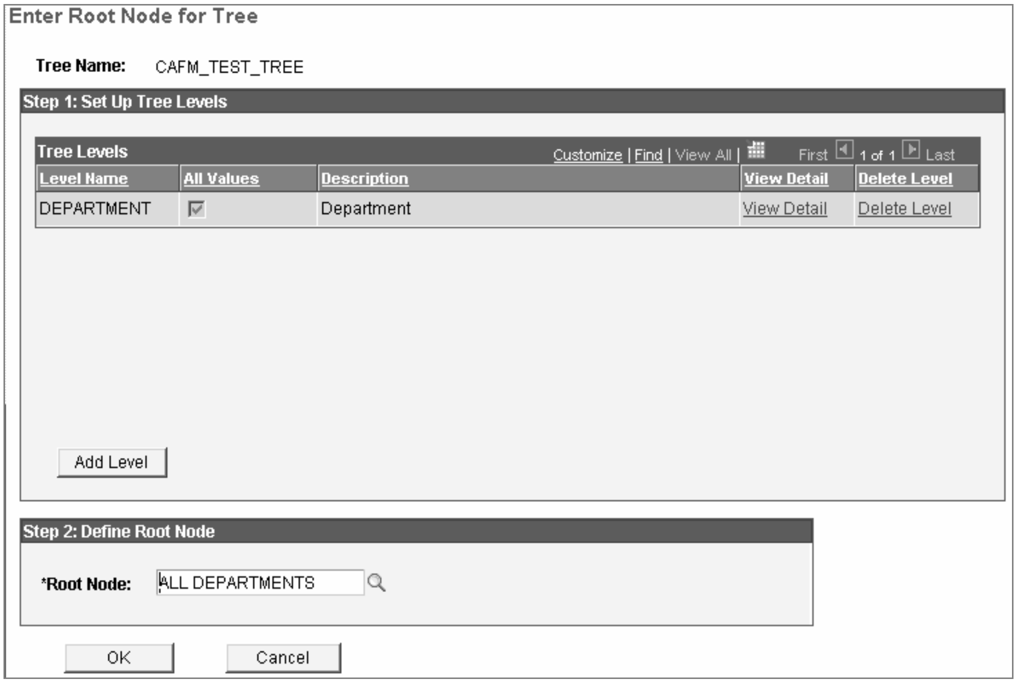
Tree Definition and Properties page

4. Enter an appropriate SetID and click **OK**.

> **Note.** This tree needs to be a **Detail** tree, where each Node in the tree has one and ONLY One Node Detail.

5. In the Step 1 section of the Enter Root Node for Tree page, click the **Add Level** button. Enter a tree level of *Department* and then click **Save.**

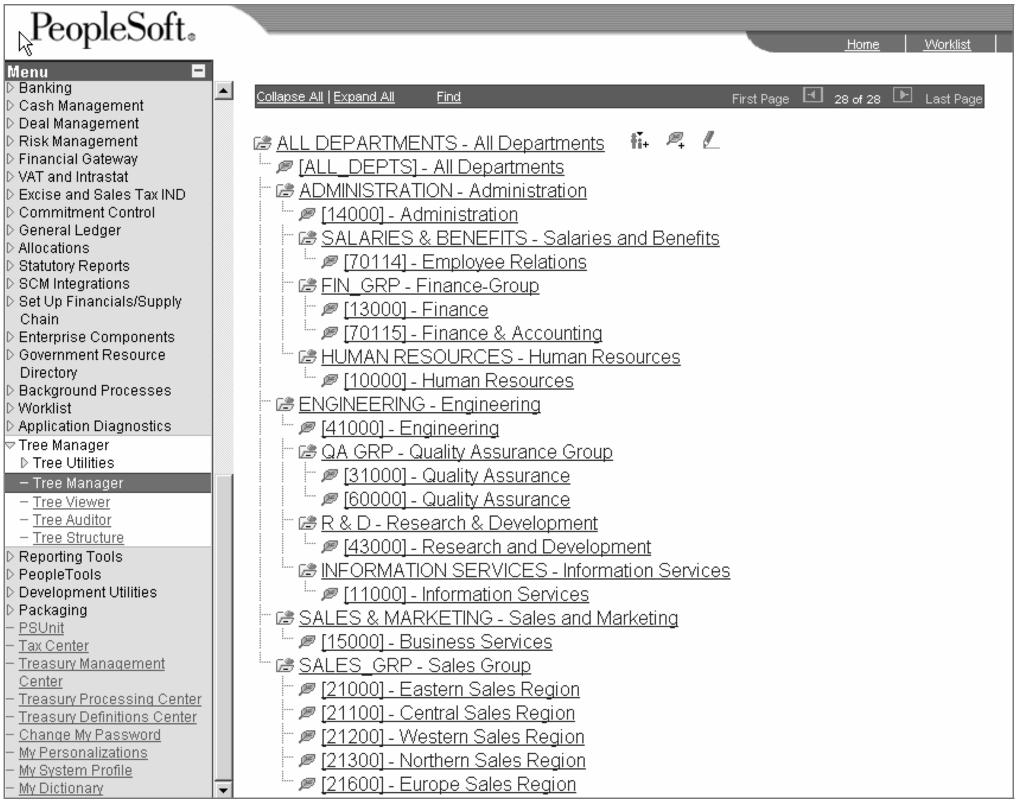
6. In the **Root Node** field, enter *ALL DEPARTMENTS.*



Enter Root Node for Tree page

7. Click **OK.**

8. Add as many nodes to this tree as you wish. Be sure to include both parent and child nodes. The following is a representative sample:



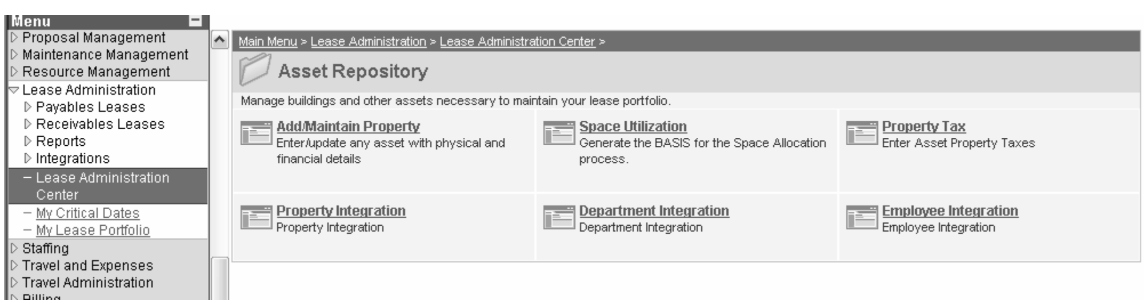
Tree Manager

9. Save and close the tree when you are done.

10. Next, publish the Tree to eCenterOne.

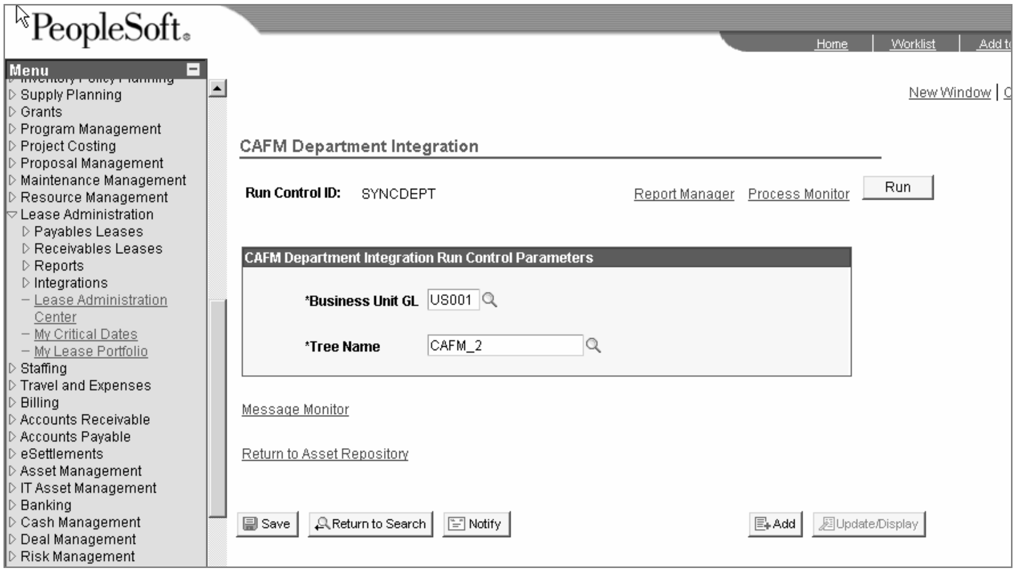
a) Use the following navigation to locate the CAFM Department publication process:

Main Menu → Lease Administration → Lease Administration Center → Asset Repository → Department Integration



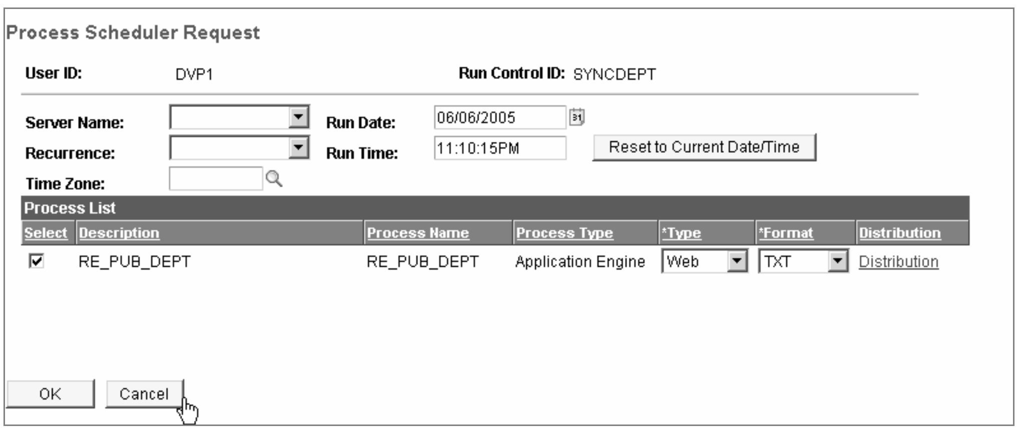
Asset Repository menu

b) Enter the run control parameters. Use the Tree Name *CAFM TEST TREE* that we defined in the previous step.



CAFM Department Integration page

c) Click **Run.**

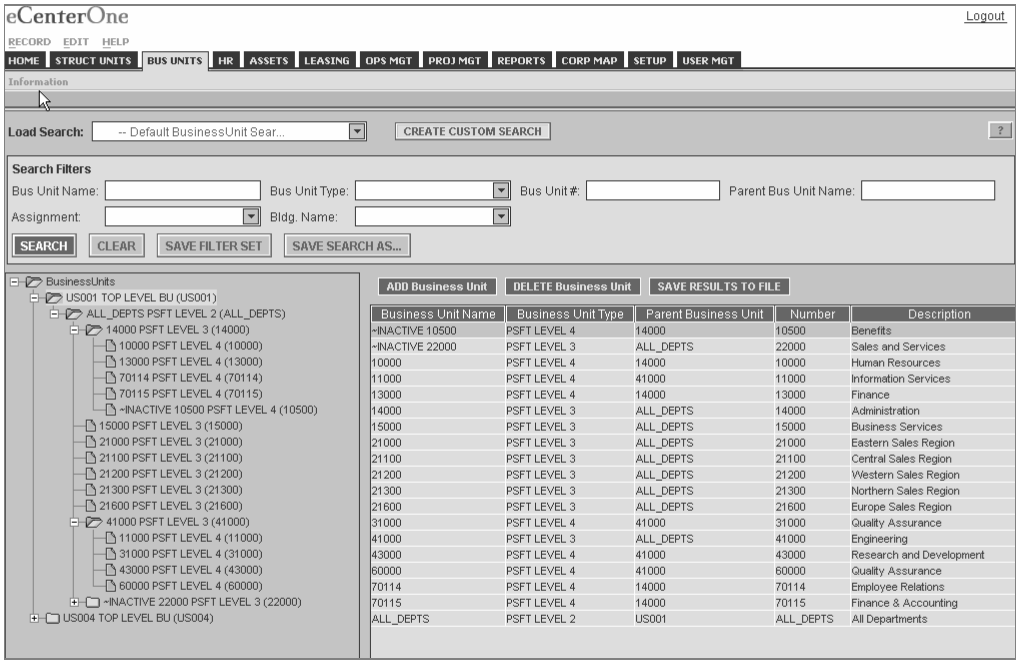


Process Scheduler Request page

d) Click **OK** to execute the task. This takes you back to the run control page. Use the **Process Monitor** link to ensure that the task completes successfully. This task must complete successfully before you can verify that the departments were published to eCenterOne.

11. Log into the eCenterOne application. Use the Business Unit search to verify that the departments defined in the tree that we created were successfully published to eCenterOne.

(Your list will look different than the sample shown below)



Business Unit Name	Business Unit Type	Parent Business Unit	Number	Description
~INACTIVE 10500	PSFT LEVEL 4	14000	10500	Benefits
~INACTIVE 22000	PSFT LEVEL 3	ALL_DEPTS	22000	Sales and Services
10000	PSFT LEVEL 4	14000	10000	Human Resources
11000	PSFT LEVEL 4	41000	11000	Information Services
13000	PSFT LEVEL 4	14000	13000	Finance
14000	PSFT LEVEL 3	ALL_DEPTS	14000	Administration
15000	PSFT LEVEL 3	ALL_DEPTS	15000	Business Services
21000	PSFT LEVEL 3	ALL_DEPTS	21000	Eastern Sales Region
21100	PSFT LEVEL 3	ALL_DEPTS	21100	Central Sales Region
21200	PSFT LEVEL 3	ALL_DEPTS	21200	Western Sales Region
21300	PSFT LEVEL 3	ALL_DEPTS	21300	Northern Sales Region
21600	PSFT LEVEL 3	ALL_DEPTS	21600	Europe Sales Region
31000	PSFT LEVEL 4	41000	31000	Quality Assurance
41000	PSFT LEVEL 3	ALL_DEPTS	41000	Engineering
43000	PSFT LEVEL 4	41000	43000	Research and Development
60000	PSFT LEVEL 4	41000	60000	Quality Assurance
70114	PSFT LEVEL 4	14000	70114	Employee Relations
70115	PSFT LEVEL 4	14000	70115	Finance & Accounting
ALL_DEPTS	PSFT LEVEL 2	US001	ALL_DEPTS	All Departments

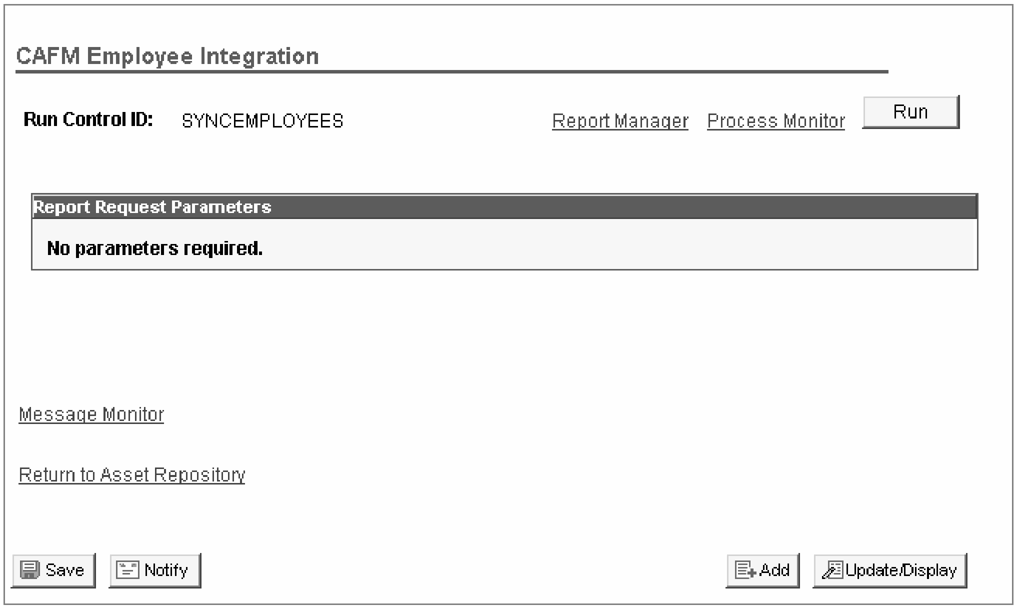
eCenterOne

Test the Employee Publish Message

To test the employee publish message:

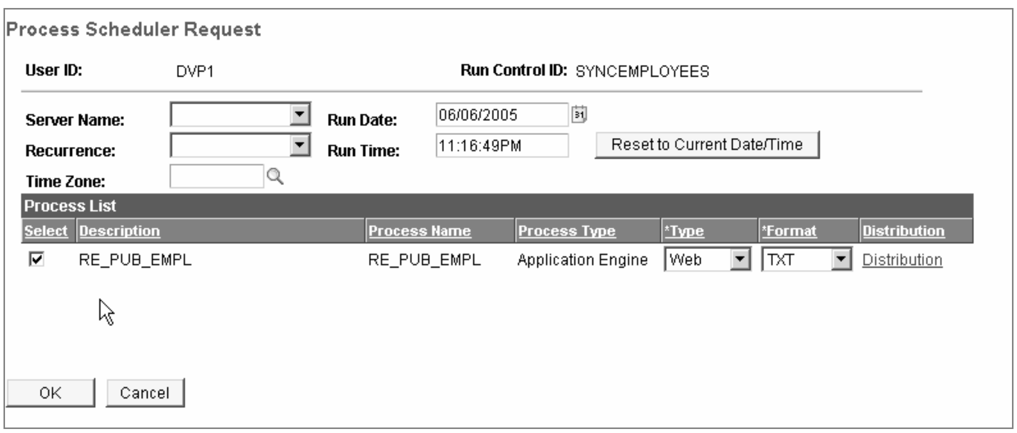
1. Access the employee publication process using the following navigation path:
   Menu → Lease Administration → Lease Administration Center → Asset Repository → Employee Integration

   On the run control page:



CAFM Employee Integration page

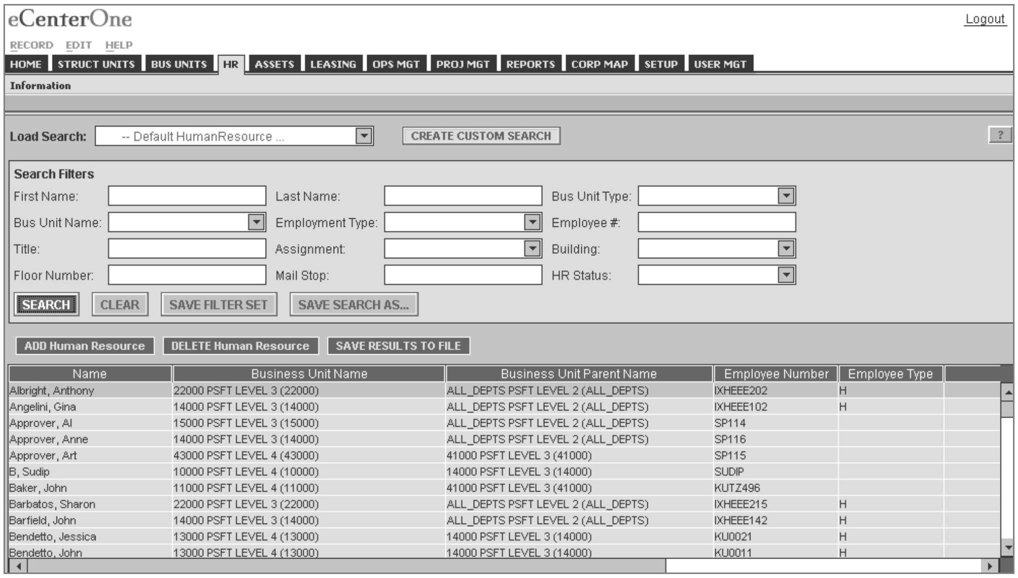
Click **Run.**



Process Scheduler Request page

Click **OK** to execute the task. This takes you back to the run control page. Use the **Process Monitor** link to ensure that the task completes successfully. This task must complete successfully before we can verify that the employees were published to eCenterOne.

2. Log into the eCenterOne application. Use the HR search to verify that the employees were successfully published to eCenterOne.



eCenterOne – HR search

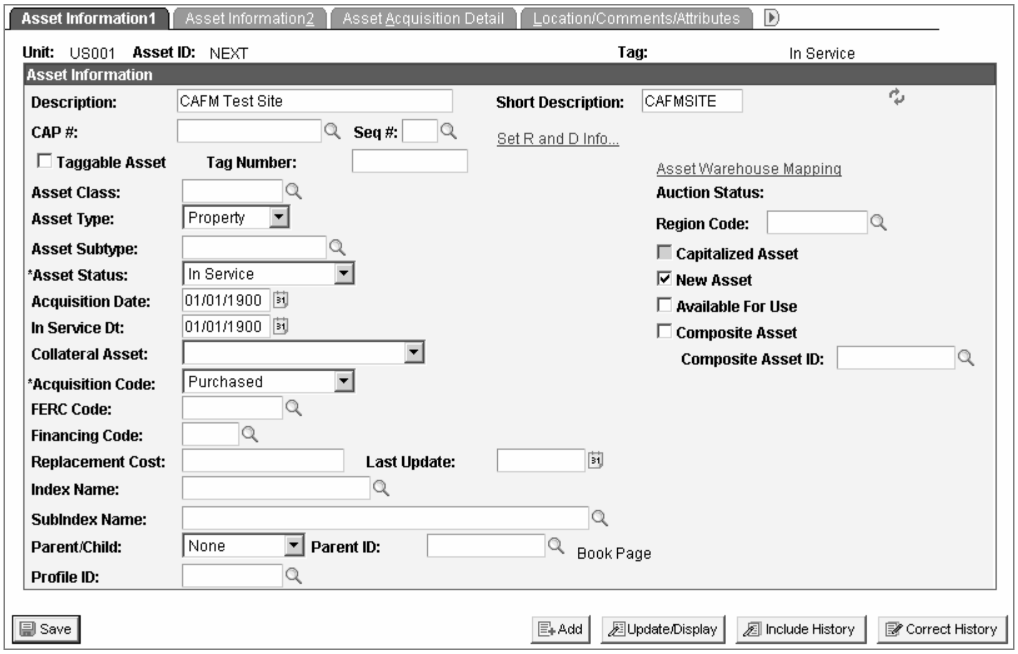
Test the Property Publish Message

To test the property publish message:

1. First, create some property assets to publish to eCenterOne. We will create one Site and one Building.

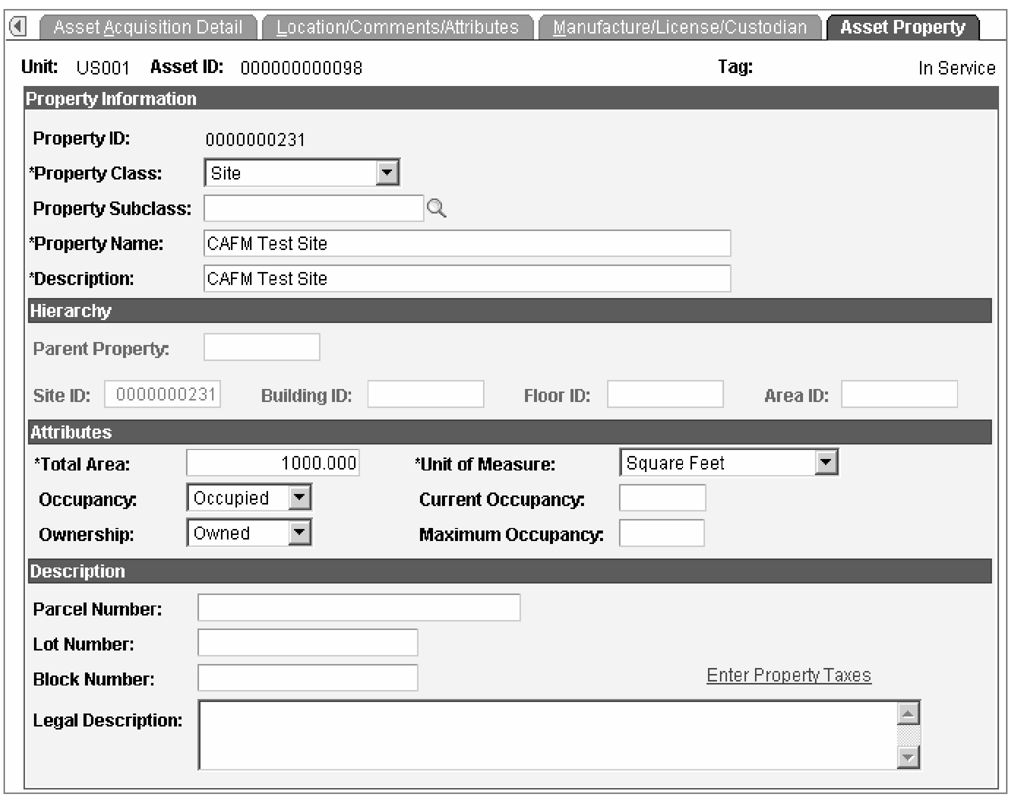
2. Access the Asset Repository using the following navigation:
   Menu → Asset Management → Asset Transactions → Owned Assets → Basic Add

3. To create a new Site, add a new value for business unit US001. Enter the values as shown below:



Asset Information1 page

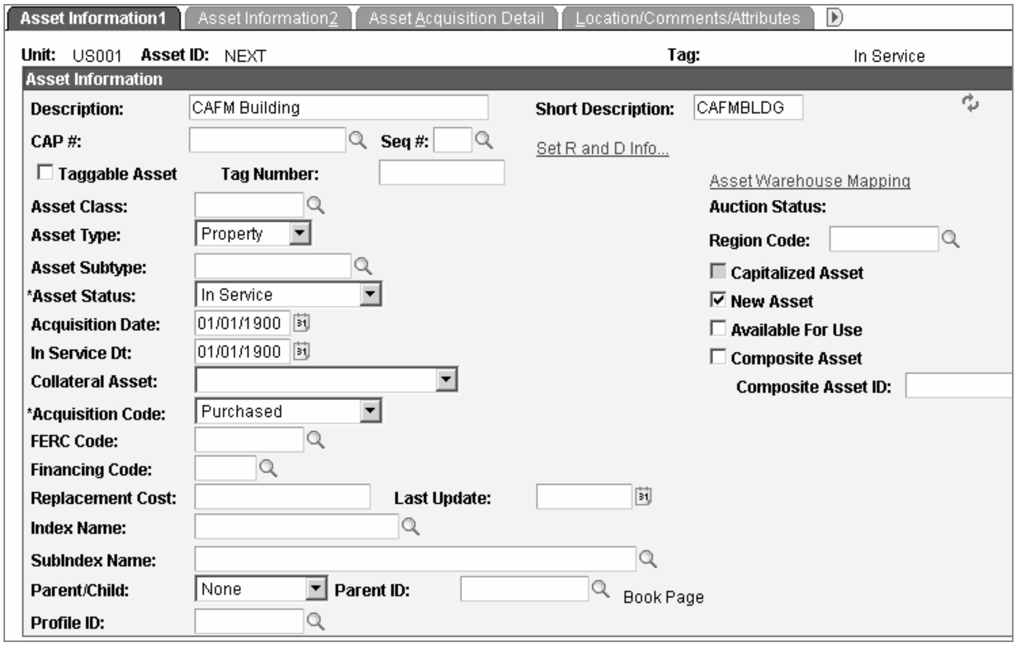
Click the Asset Property tab (it may be off the screen to the right, use the control at the top of the page to access the additional pages).



Asset Property tab

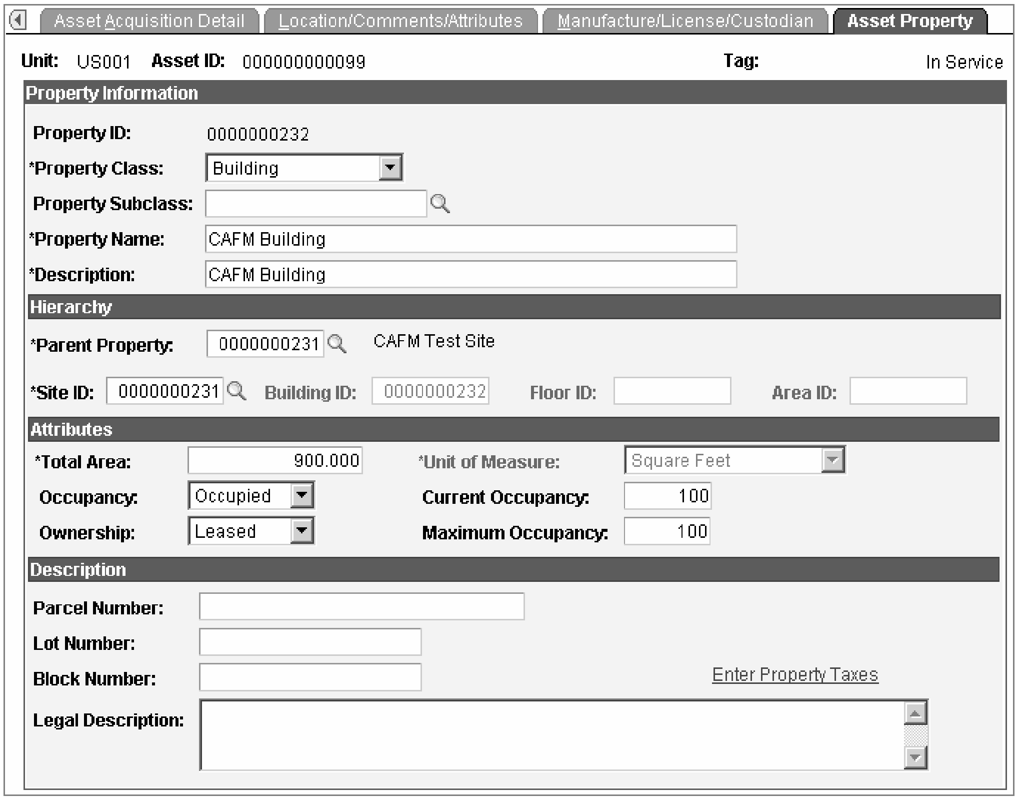
Click **Save.**

4. Next, create the Building. Click **Add.** Enter *US001* as the business unit and click **Add.** Enter the details as shown:



Asset Information1 page

Access the Property page, and enter the values as shown. Be sure to associate the Building with the Site we created by setting the Parent Property:

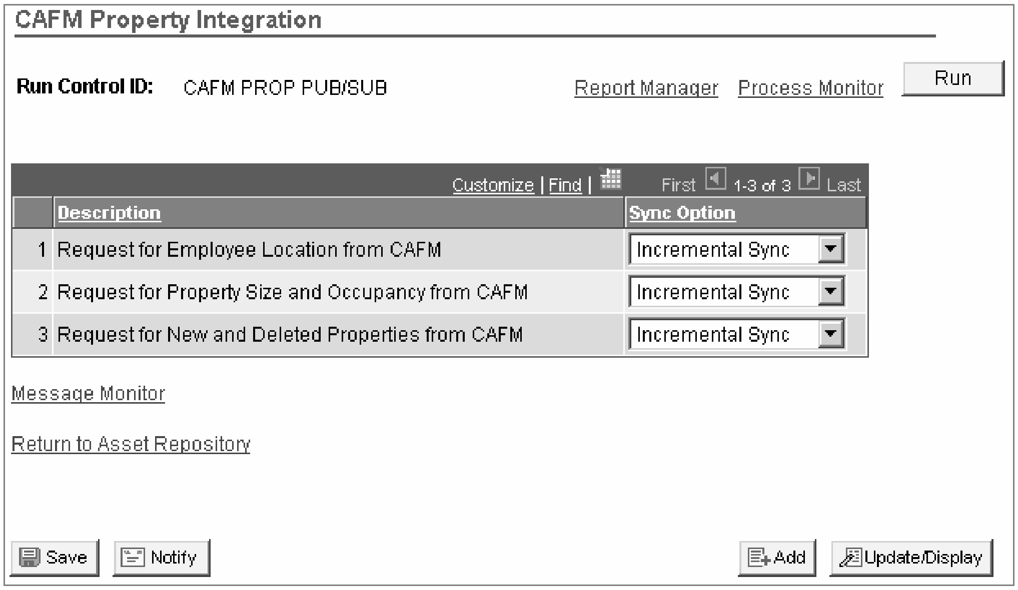


Asset Property tab

Click **Save.**

5. Access the property publication process using the following navigation path.
Menu → Lease Administration → Lease Administration Center → Asset Repository → Property Integration

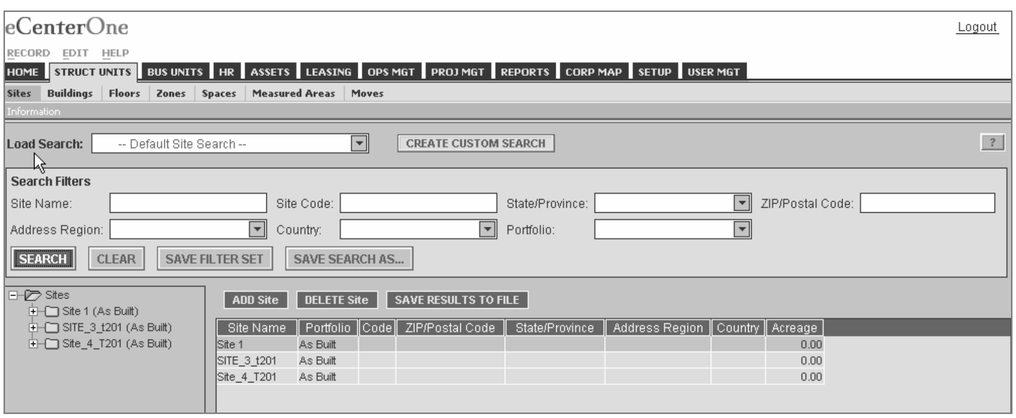
6. Enter the run control parameters as shown:



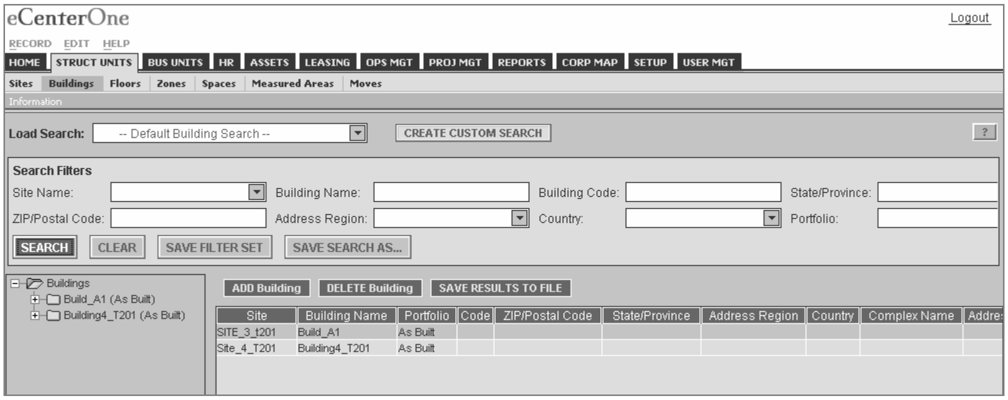
CAFM Property Integration page

Click **Run.** On the Process Request page, click **OK.** Ensure that the process completes successfully before continuing.

7. Log into the eCenterOne application. Use the Structural Units search to verify that the Site and Building we created were successfully published to eCenterOne. (Note: the sample screens below show a different set of sample data):



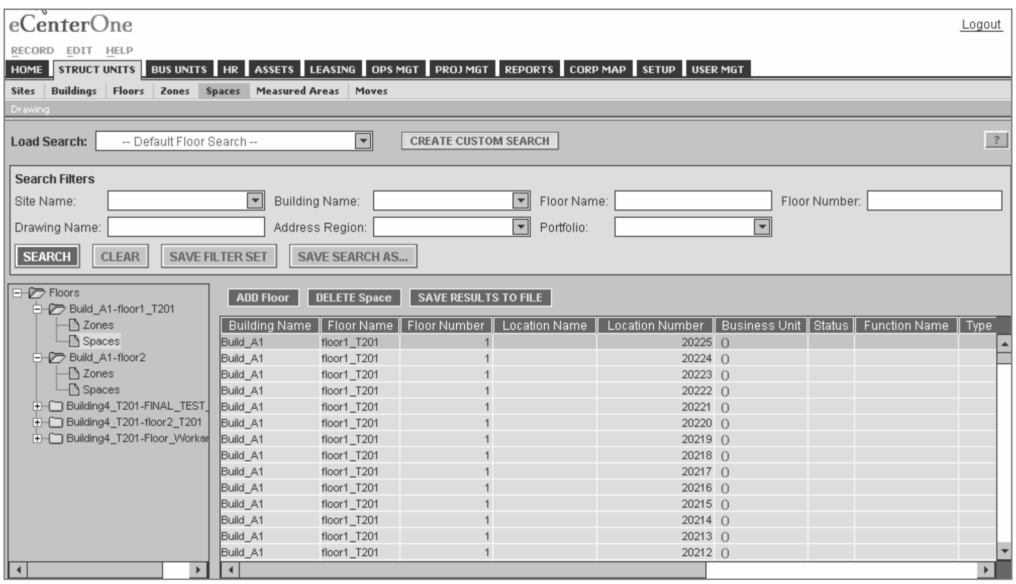
eCenterOne – STRUCT UNITS search



eCenterOne – STRUCT UNITS search

8. Next, verify the data transfer from eCenterOne to PeopleSoft.

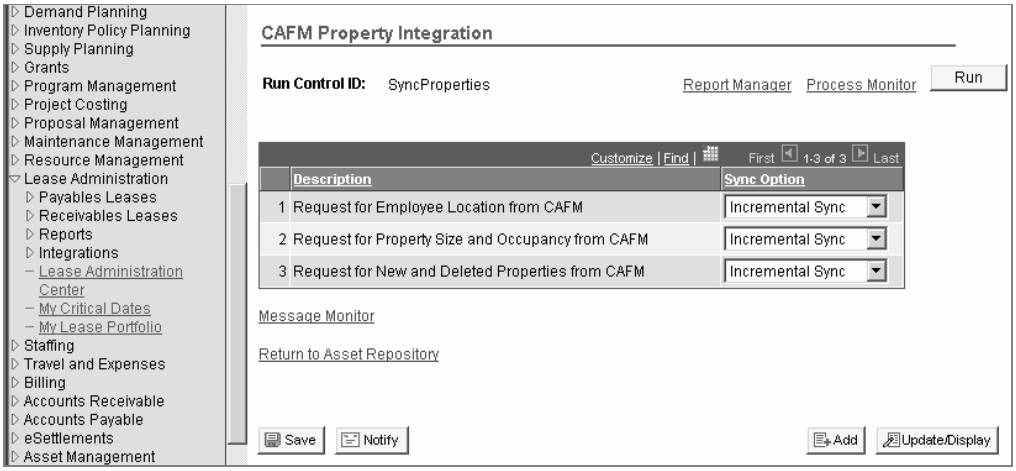
9. Within eCenterOne, create one Floor and a Floor Plan containing one or two spaces for the Building that we previously published to the eCenterone Application (*CAFM Building*).



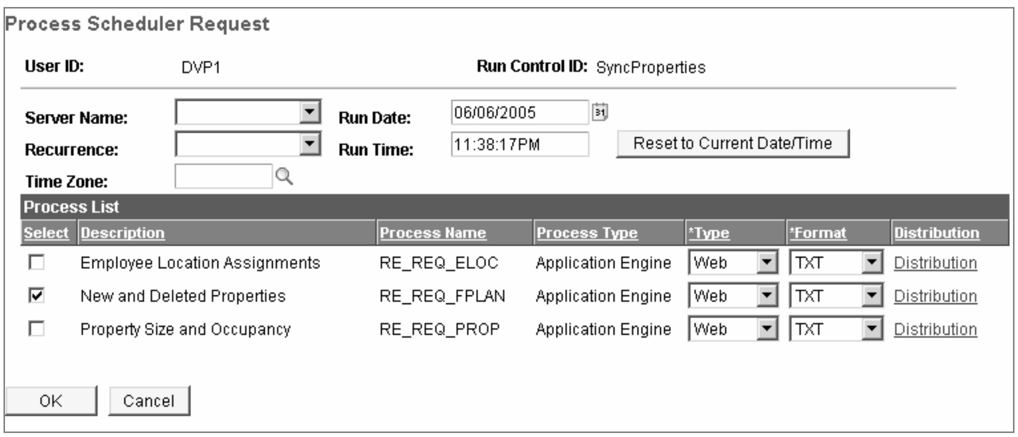
eCenterOne – STRUCT UNITS search

10. Return to the PeopleSoft application. Re-run the CAFM Property Integration process to retrieve the new floor from eCenterOne. Then, run the process for a second time to pick up the spaces.

Menu → Lease Administration → Lease Administration Center → Asset Repository → Property Integration



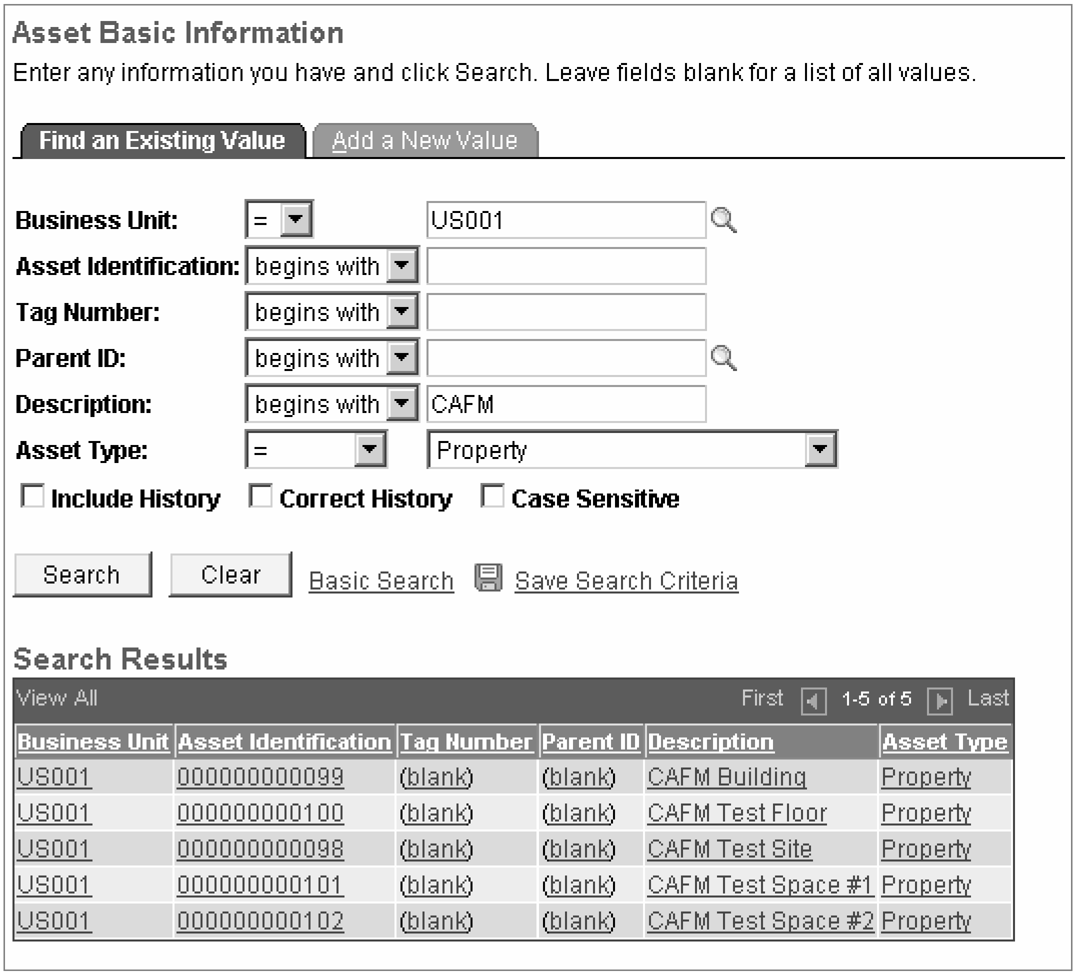
CAFM Property Integration page



Process Scheduler Request page

11. Once the process completes, verify that the Floor and Spaces were added to the Asset Repository.

Menu → Asset Management → Asset Transactions → Owned Assets → Basic Add



Asset Basic Information

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

Find an Existing Value | Add a New Value

Business Unit: = US001

Asset Identification: begins with

Tag Number: begins with

Parent ID: begins with

Description: begins with CAFM

Asset Type: = Property

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-5 of 5 Last

Business Unit	Asset Identification	Tag Number	Parent ID	Description	Asset Type
US001	000000000099	(blank)	(blank)	CAFM Building	Property
US001	000000000100	(blank)	(blank)	CAFM Test Floor	Property
US001	000000000098	(blank)	(blank)	CAFM Test Site	Property
US001	000000000101	(blank)	(blank)	CAFM Test Space #1	Property
US001	000000000102	(blank)	(blank)	CAFM Test Space #2	Property

Asset Basic Information page

ECenterOne Connector Properties

*Property ID	*Property Name	Required	Value	Default
ECENTERONETARGET	eCenter One URL	Y		Y
ECENTERONETARGET	Username	Y		Y
ECENTERONETARGET	Password	Y		Y
ECENTERONETARGET	Database	Y		Y
ECENTERONETARGET	Email	N		N
ECENTERONETARGET	Asynchronous	Y	true	Y
ECENTERONETARGET	Native	Y	false	Y
ECENTERONETARGET	Message Name	N		N
ECENTERONETARGET	XSLT File Name	N		N
HEADER	sendUncompressed	Y	N	Y

Peoplesoft delivered NODE Transactions for PSFT_XOUTBND Node

Transaction Type	Request Message	Request Message Version
OutAsync	ADD_EMP_PUB	VERSION_1
OutAsync	ADD_PROP_PUB	VERSION_1
OutAsync	SYN_DEPT_HIER_PUB	VERSION_1
OutAsync	SYN_EMP_PUB	VERSION_1
OutAsync	UPD_EMP_PUB	VERSION_1
OutAsync	UPD_PROPID_PUB	VERSION_1
OutSync	LST_DELETEDPROPS_REQ	VERSION_1
OutSync	LST_NEWPROPS_REQ	VERSION_1
OutSync	UPD_EMPLOC_REQ	VERSION_1
OutSync	UPD_PROP_REQ	VERSION_1

Note. The Following properties MUST be configured for PSFT_XOUTBND Node Transaction Connector Properties. If the properties are not set correctly, the integration will NOT work properly.

Properties for Asynchronous Node Transactions

*Property ID	*Property Name	Value
ECENTERONETARGET	Asynchronous	**true**
ECENTERONETARGET	Native	**false**
HEADER	sendUncompressed	**Y**

Properties for Synchronous Node Transactions

*Property ID	*Property Name	Value
ECENTERONETARGET	Asynchronous	**false**
ECENTERONETARGET	Native	**false**
HEADER	sendUncompressed	**N**

Peoplesoft delivered Transactions for PSFT_XOUTBND RELATIONSHIP

Initial Node	Transaction Type	Request Message Name	Request Transformation	Response Transformation
PSFT_XOUTBND	OA	ADD_EMP_PUB	RE_HRADD_XFM	
PSFT_XOUTBND	OA	ADD_PROP_PUB	RE_PRADD_XFM	
PSFT_XOUTBND	OA	SYN_DEPT_HIER_PUB	RE_DEPT_XFM	
PSFT_XOUTBND	OA	SYN_EMP_PUB	RE_HRSYN_XFM	
PSFT_XOUTBND	OA	UPD_EMP_PUB	RE_HRUPD_XFM	
PSFT_XOUTBND	OA	UPD_PROPID_PUB	RE_PRPID_XFM	
PSFT_XOUTBND	OS	UPD_EMPLOC_REQ	RE_REQ_1_XFM	RE_RES_1_XFM
PSFT_XOUTBND	OS	UPD_PROP_REQ	RE_REQ_2_XFM	RE_RES_2_XFM
PSFT_XOUTBND	OS	LST_NEWPROPS_REQ	RE_REQ_3_XFM	RE_RES_3_XFM
PSFT_XOUTBND	OS	LST_DELETEDPROPS_REQ	RE_REQ_4_XFM	RE_RES_4_XFM

CHAPTER 18

INTEGRATING PEOPLESOFT ENTERPRISE 9.0 IT ASSET MANAGEMENT WITH ALTIRIS INVENTORY SOLUTION

Peoplesoft 9.0 IT Asset Management integrates with Altiris' Inventory solution, which provides the following functionality:

- Retrieve the physical attributes of IT Assets in the Altiris Inventory database to compare to the assets in the financial books.
- Retrieve Software of interest installed on the IT Assets.
- Retrieve Hardware and Software Progress Report data based on user-defined parameters.

Integration with Altiris' Inventory Solution is required. Altiris is a 3rd party vendor. Customers need to purchase Licensing directly from Altiris, before the proceeding further with this installation.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 18-1	Installing Target Connector for Altiris
Task 18-2	Local Gateway Configuration
Task 18-3	Configure Outbound Node
Task 18-4	Configure Inbound Nodes
Task 18-5	Activate Service Operations

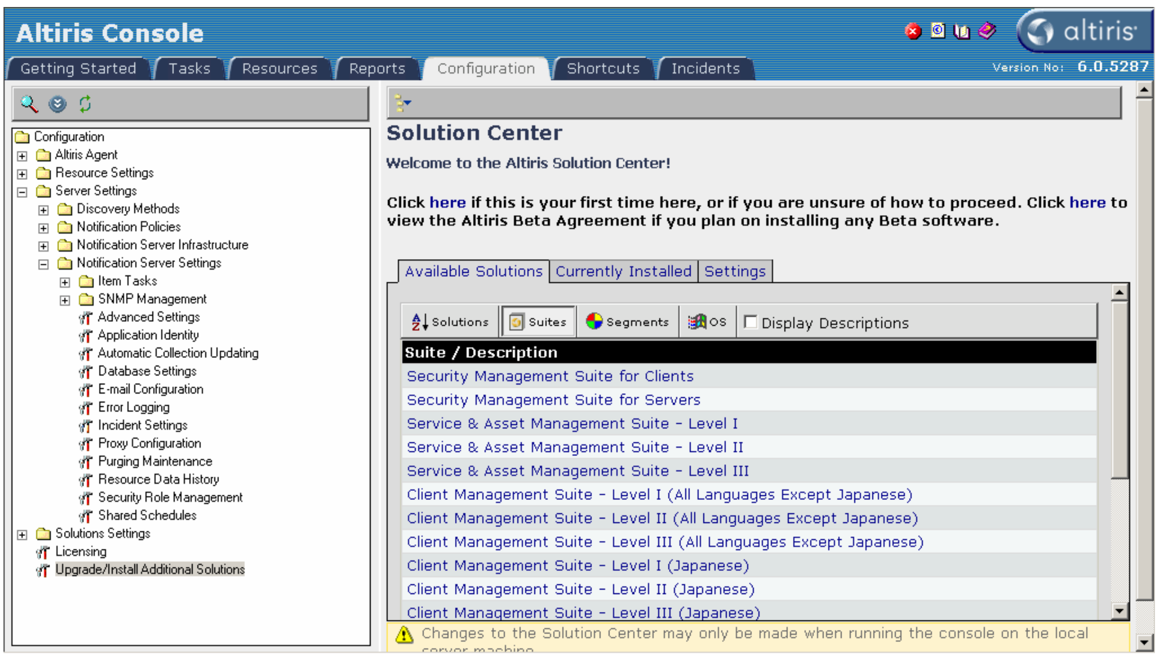
Task 18-6	Run Message Channel
Task 18-7	Activate Domain for Asynchronous Messaging
Task 18-8	3rd Party Integration Setup
Task 18-9	Verify the Integration

Task 18-1: Installing Target Connector for Altiris

To install the target connector for Altiris:

1. Access the Altiris Console on the machine hosting the Altiris Notification Server (Start → Programs → Altiris → Altiris Console).

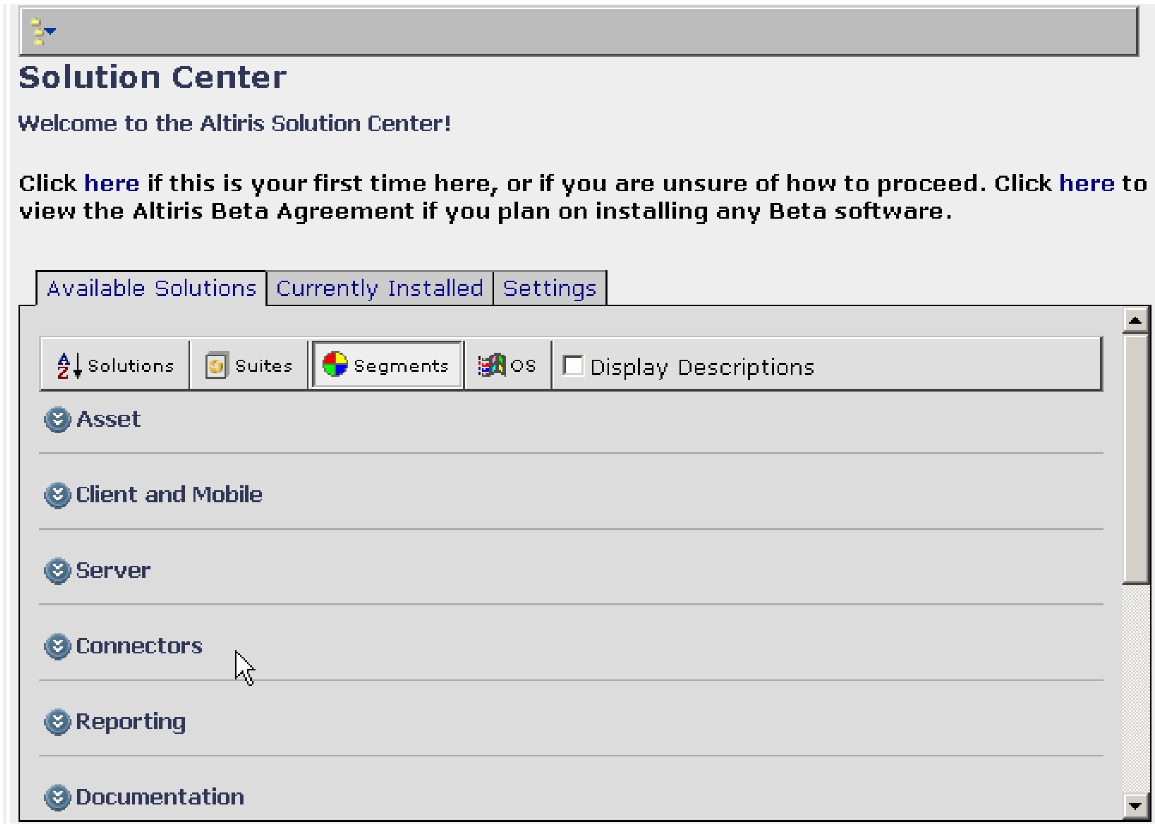
2. Click on **Upgrade/Install Additional Solutions.**



Altiris Console

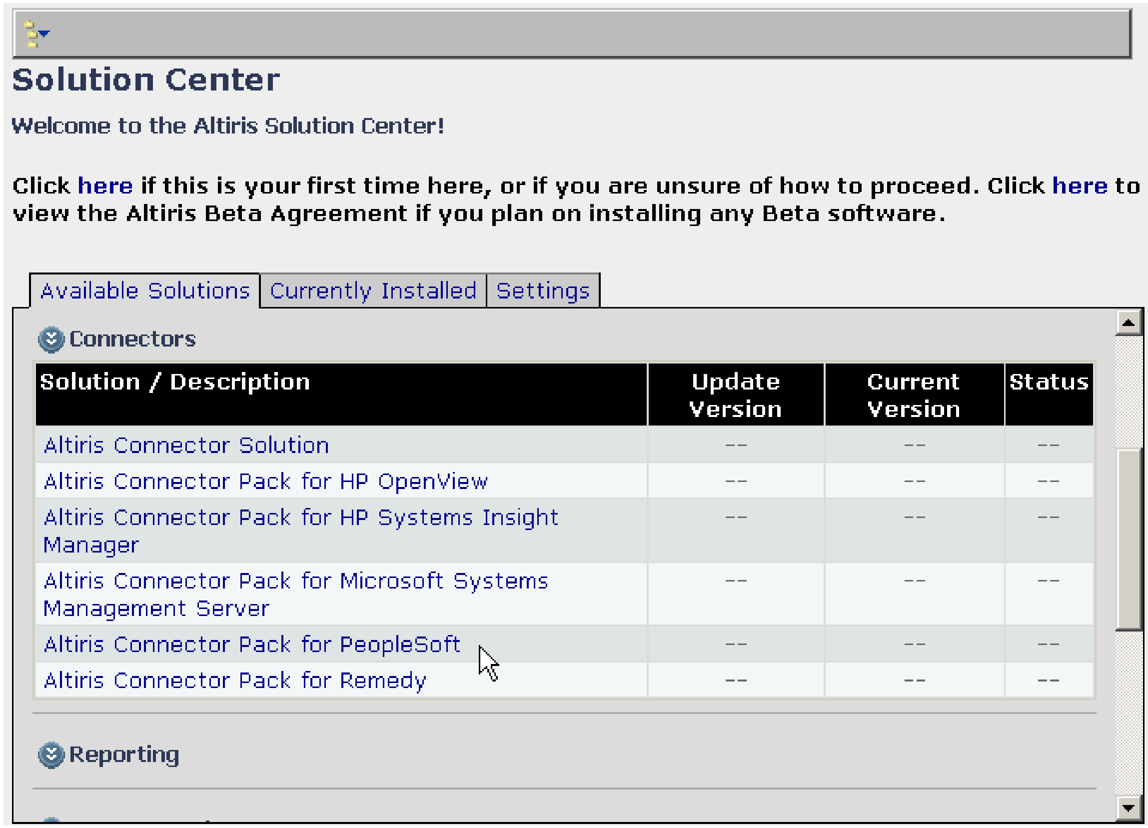
3. Click on **Segments.**

4. Click on **Connectors** to expand the list.



Solution Center page

5. Click on **Altiris Connector Pack for PeopleSoft.**



Solutions Center page

> **Note.** If you are encountering problems accessing the URL or locating, downloading the files, please contact Altiris support at **888-252-5551 or email** support@altiris.com. For all other issues contact Oracle Customer Support.

Task 18-2: Local Gateway Configuration

To configure the local gateway:

1. Navigate to PeopleTools → Integration Broker → Configuration → Gateways.

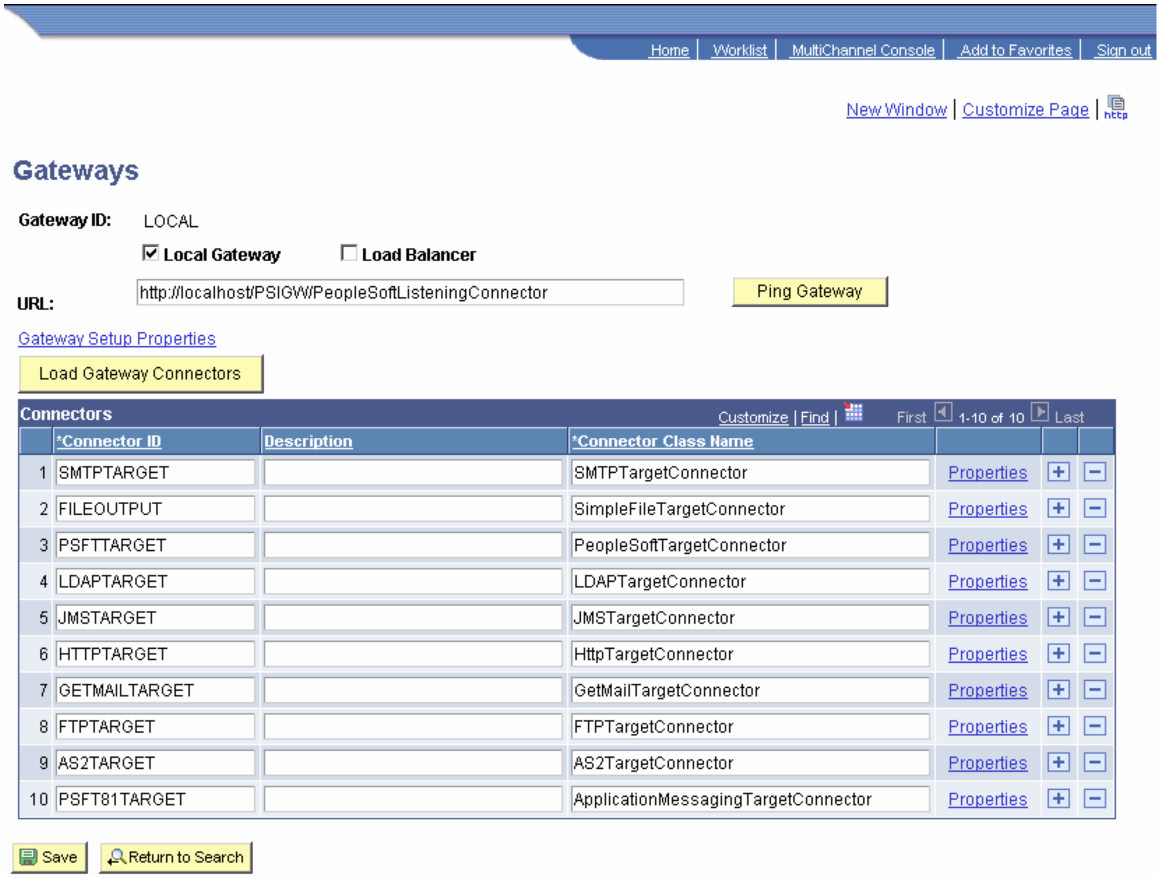
2. Click **Search.** It will automatically prompt you to the Local gateway.

3. Change the URL to *http://<WEBSRV:PORT>/PSIGW/PeopleSoftListeningConnector*.

4. Click **Save!**

5. Then, click the **Load Gateway Connectors** button. This ensures that all the existing connectors are installed on the gateway.

6. Click **Save** again. This will install the connectors.

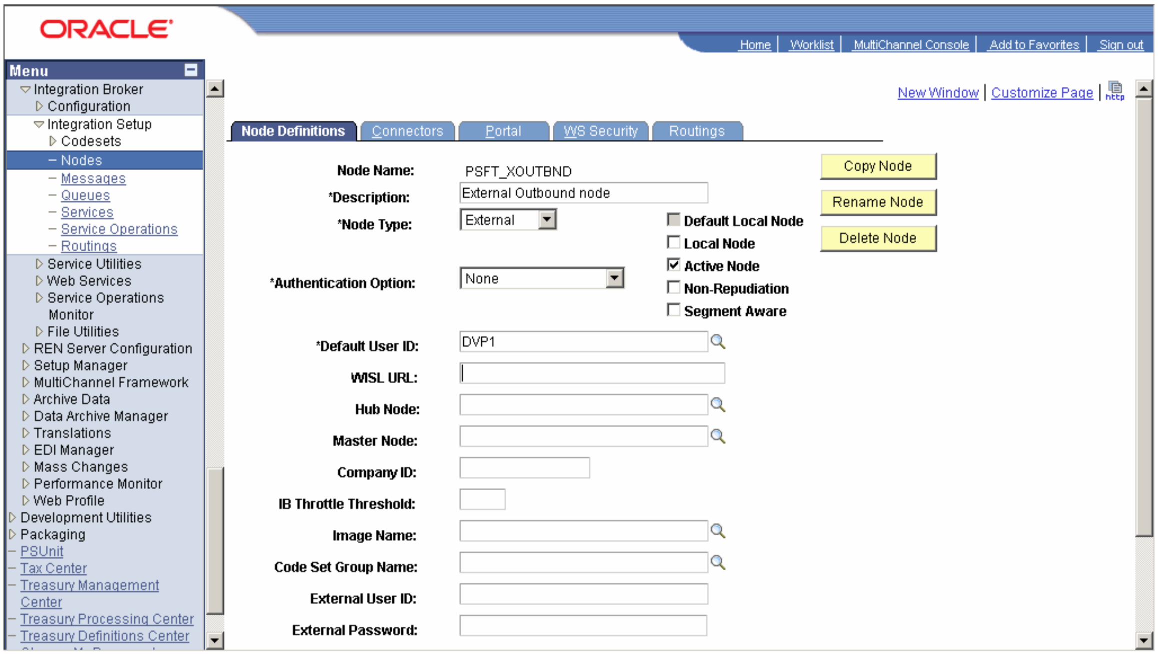


Gateways page

Task 18-3: Configure Outbound Node

To configure the outbound node:

Configure an Outbound External Node (PSFT_XOUTBND) to enable Messaging to Altiris' Server.



Node Definitions page

1. Navigate to PeopleTools → Integration Broker → Integration Setup → Nodes.

2. Search for and select the *PSFT_XOUTBND* Node.

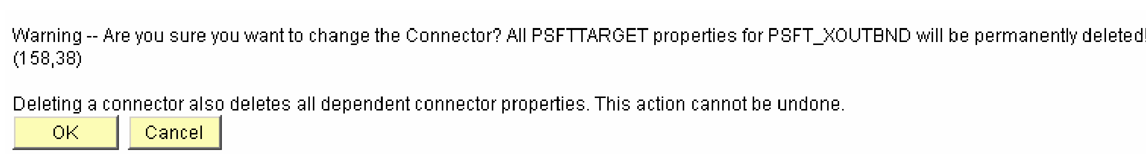
3. Click the Connectors tab and select *HTTPTARGET* as the Connector ID.

4. For the Property ID *PRIMARYURL*, enter the IP Address of the Altiris server with the following directory appended: /Altiris/ConnectPeopleSoft/PeopleSoftRequest.aspx

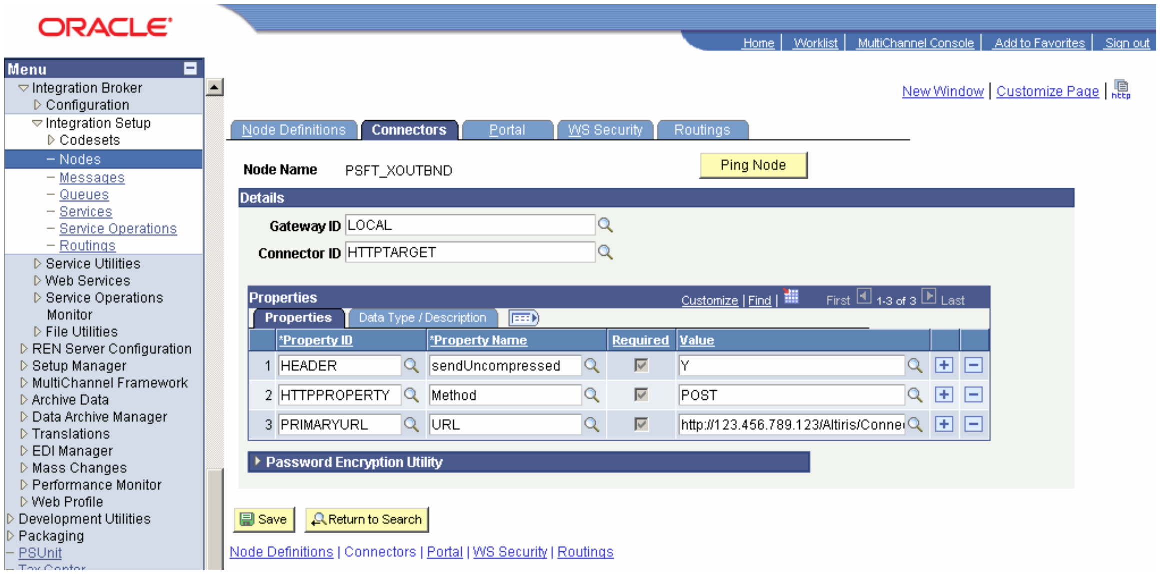
Example: http://123.456.789.123/Altiris/ConnectPeopleSoft/PeopleSoftRequest.aspx

5. Click **Save.**

6. If the following message is displayed, click **OK.**



Warning Message



Connectors tab

Task 18-4: Configure the Inbound Nodes

To configure the inbound nodes:

1. Navigate to PeopleTools → Integration Broker → Integration Setup → Nodes.

2. Search for and select the *PSFT_XINBND* Node.

3. Set the Default User ID for the user that will be making the request from ITAM for the PSFT_XINBND Nodes.

4. Click **Save.**

5. Search for and select the *ANONYMOUS* Node.

6. Set the Default User ID for the user that will be making the request from ITAM for the ANONYMOUS Node.

7. Click **Save.**

Node Definitions page – PSFT_XINBND node

Node Definitions page – ANONYMOUS node

Task 18-5: Activate Service Operations

To activate service operations:

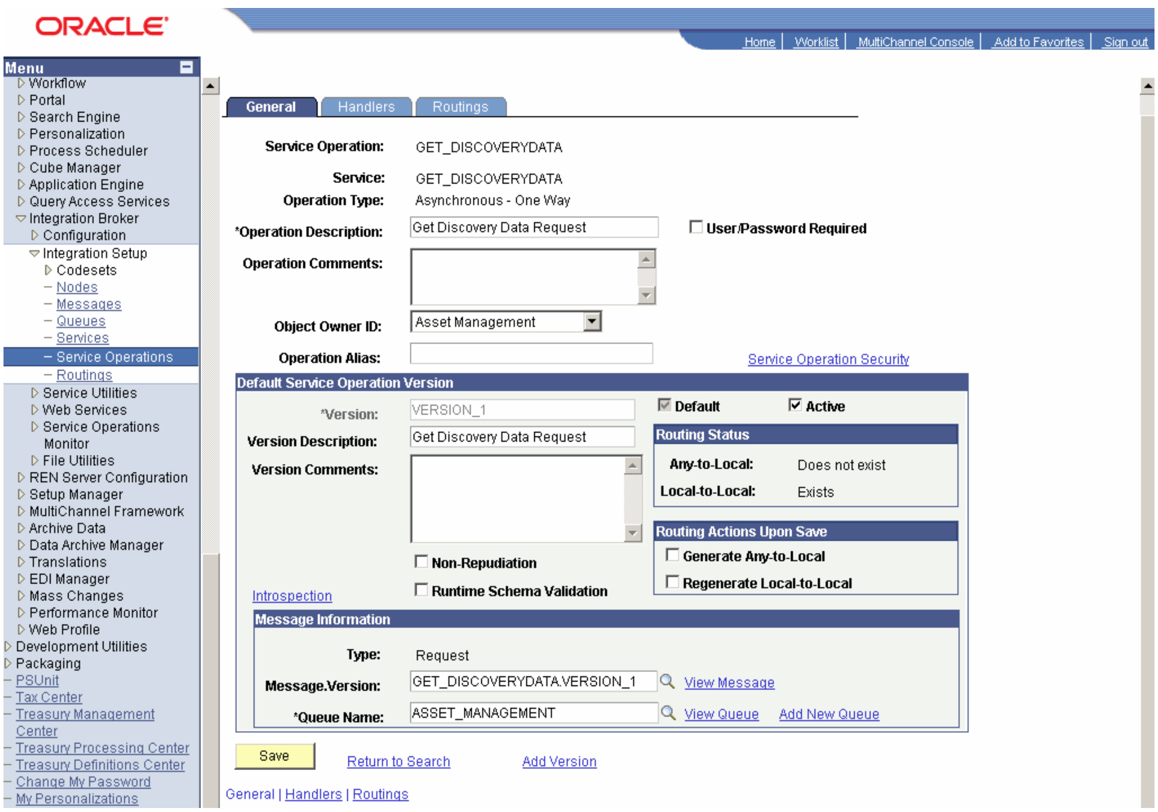
1. Navigate to PeopleTools → Integration Broker → Integration Setup → Service Operations.

2. Enter *GET_D* in the Service parameter of the Search Dialog.

3. Click **Search.**

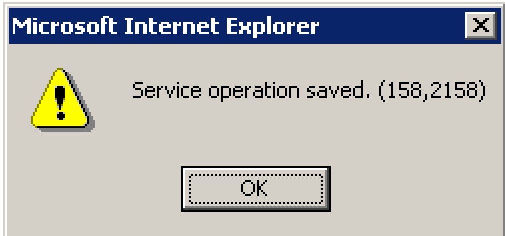
4. Select the *GET_DISCOVERYDATA* Service.

5. Select the **Active** checkbox and then click **Save.**



Service Operations – General page

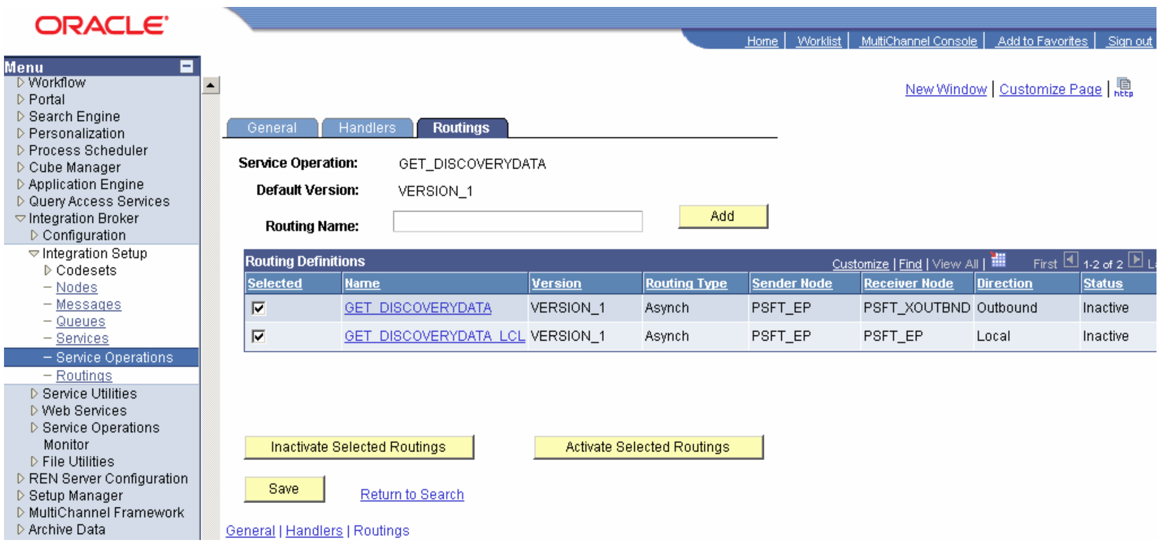
6. The following message is displayed. Click **OK.**



Service Operation Save message

7. Click the Routings tab and select both rows.

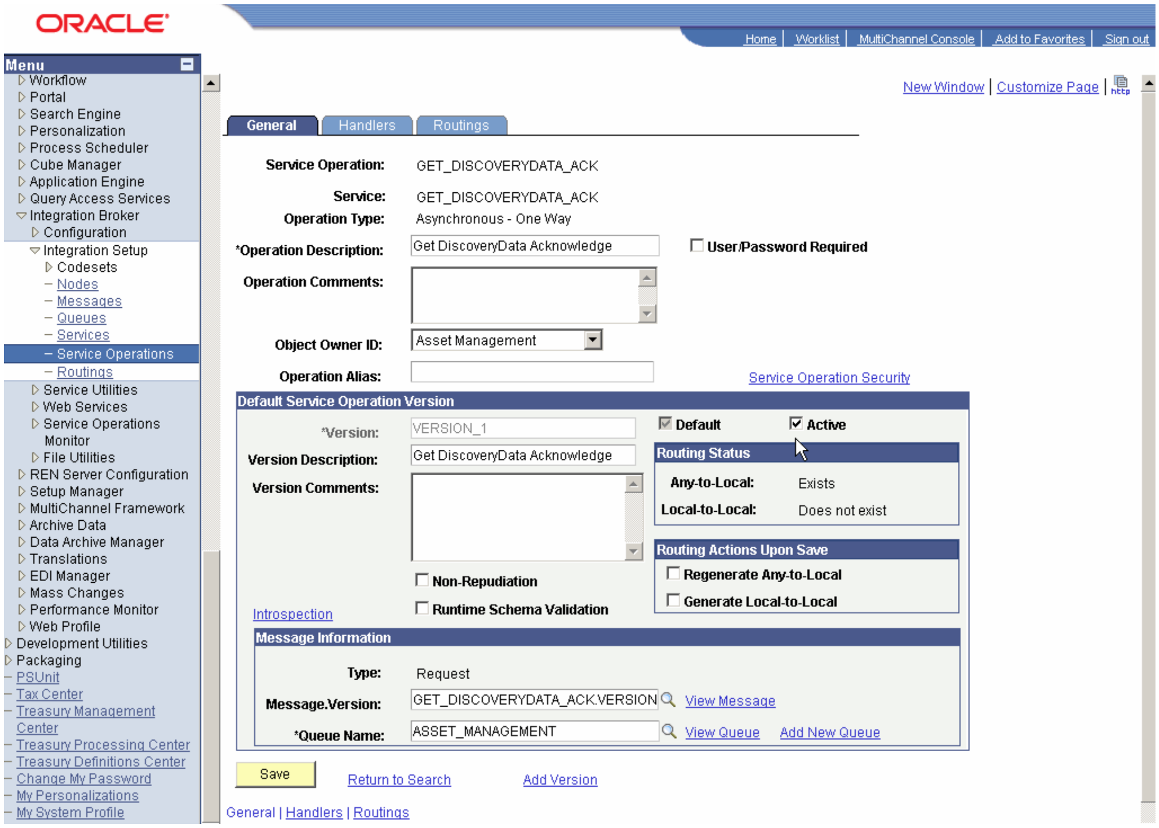
8. Click the **Activate Selected Routings** button.



Service Operations – Routings page

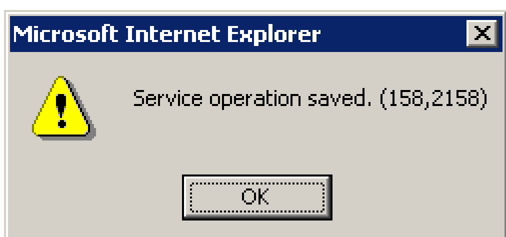
9. Click the **Return to Search** link. Select the *GET_DISCOVERYDATA_ACK* Service.

10. Click the **Active** check box and then click **Save.**



Service Operations – General page

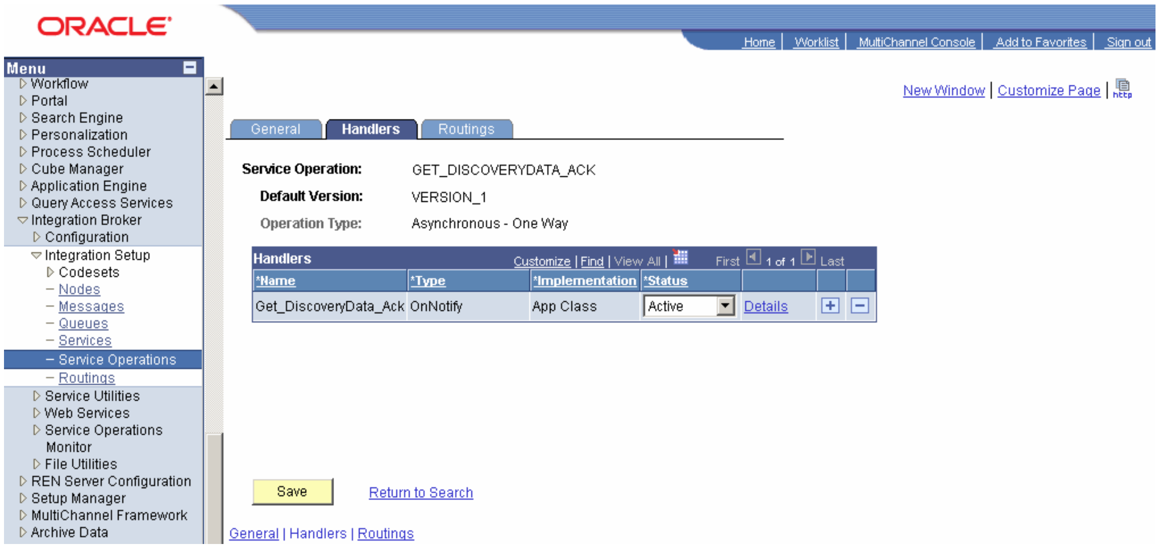
11. The following message is displayed. Click **OK.**



Service Operation Save message

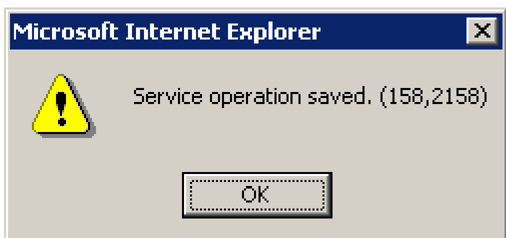
12. Select the Handlers tab.

13. Set the **Status** field to *Active* and then click **Save.**



Service Operations – Handlers page

14. The following message is displayed. Click **OK.**

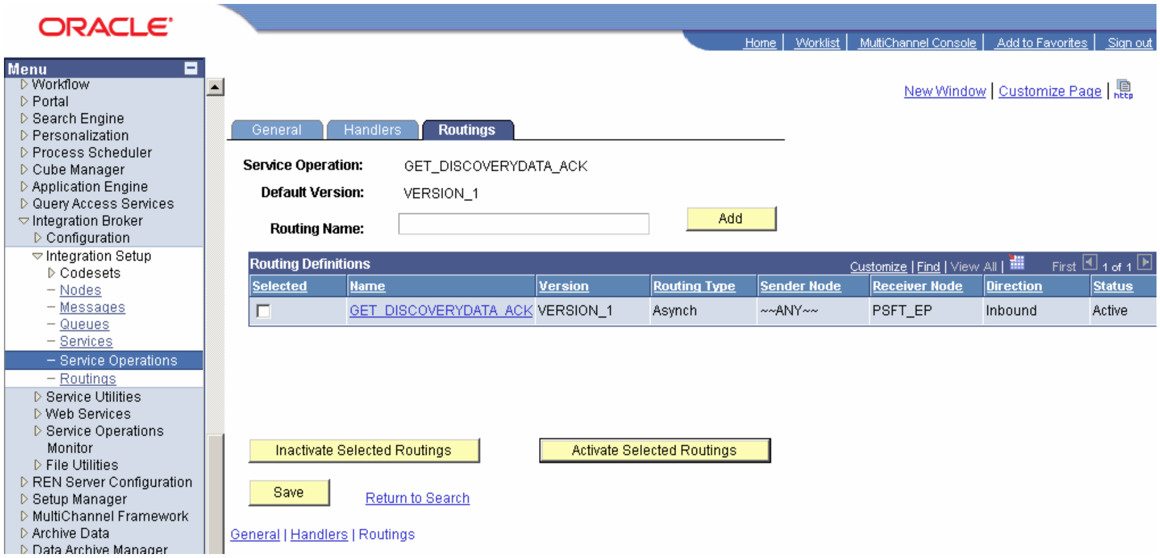


Service Operation Save message

15. Select the Routings tab.

16. Select the *GET_DISCOVERYDATA_ACK* routing definition.

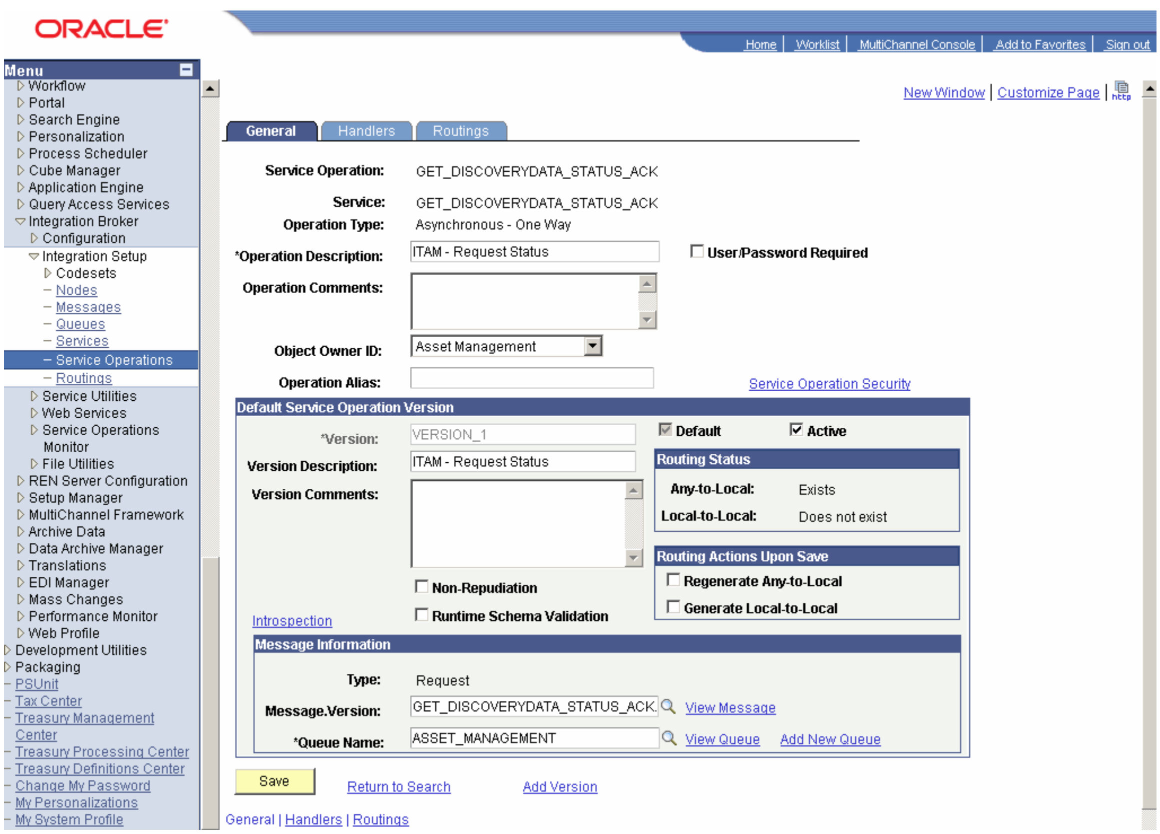
17. Click the **Activate Selected Routings** button.



Service Operations – Routings page

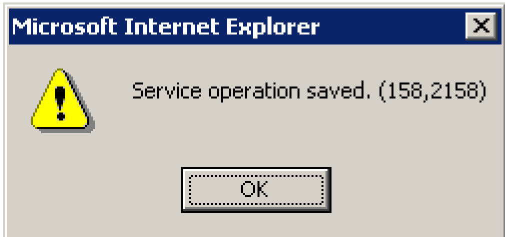
18. Click the **Return to Search** link. Search for and select the *GET_DISCOVERYDATA_STATUS_ACK* Service Operation.

19. Select the **Active** check box and then click **Save.**



Service Operations – General page

20. The following message is displayed. Click **OK.**



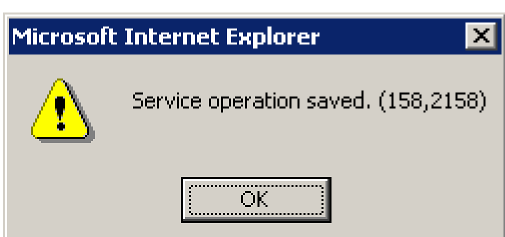
Service Operation Save message

21. Select the Handlers tab.

22. Set the **Status** field to *Active* and then click **Save.**

Service Operations – Handlers page

23. The following message is displayed. Click **OK.**

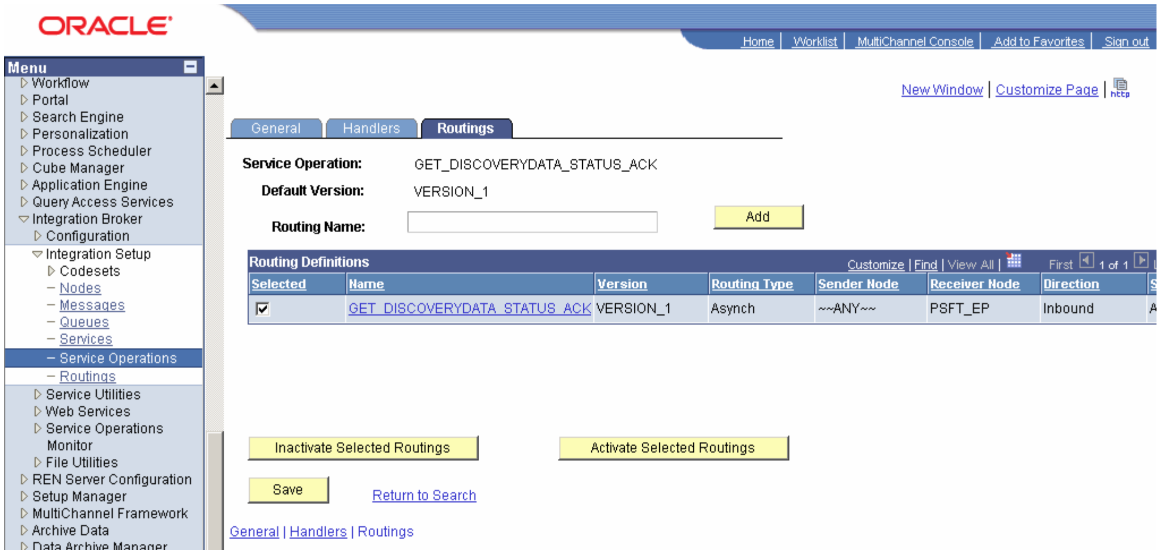


Service Operation Saved message

24. Click the Routings tab.

25. Select the *GET_DISCOVERYDATA_STATUS_ACK* routing definition.

26. Click the **Activate Selected Routings** button.



Service Operations – Routings page

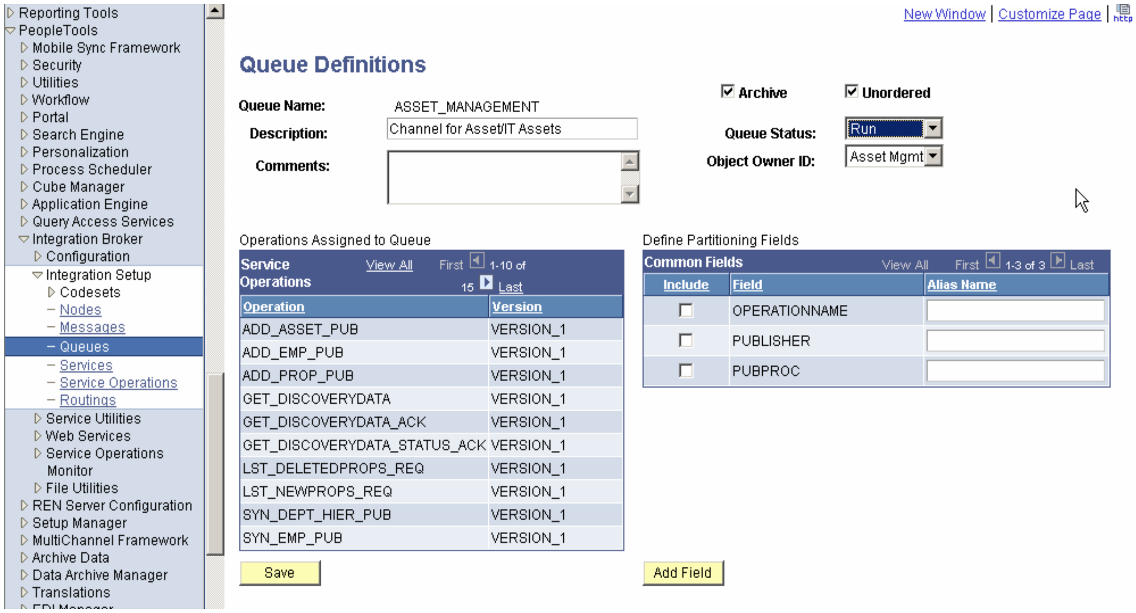
Task 18-6: Run Message Channel

To run the message channel:

1. Navigate to PeopleTools → Integration Broker → Integration Setup → Queues.

2. Search for the *ASSET_MANAGEMENT* Queue Name Channel and make sure the Queue Status is set to *Run.*

3. If the Queue Status is *Paused*, select *Run* in the **Queue Status** field and then click **Save.**



Queue Definitions page

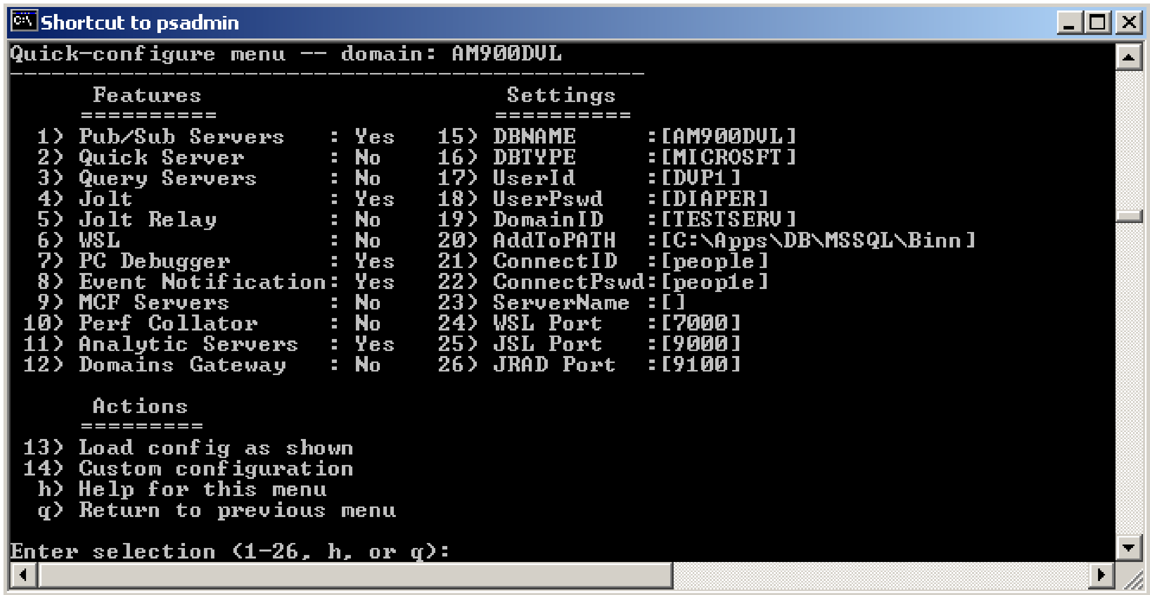
4. The following message is displayed. Click **OK.**

Queue Save message

Task 18-7: Activate Domain for Asynchronous Messaging

Asynchronous message handling in PeopleSoft is different from synchronous message handling. In the asynchronous mode, a message is dumped in a queue and a message handler then picks the message and gives it to message dispatcher, the dispatcher in turn delivers the message to the target node. To enable message handler and dispatcher, make sure that your domain has publish/subscribe servers configured in psadmin.

Set Pub/Sub servers to Yes as shown below.



Note.	Psadmin configuration is used to support asynchronous messaging, after starting your app server you will see two new processes one for Message Handler, and one for message dispatcher.

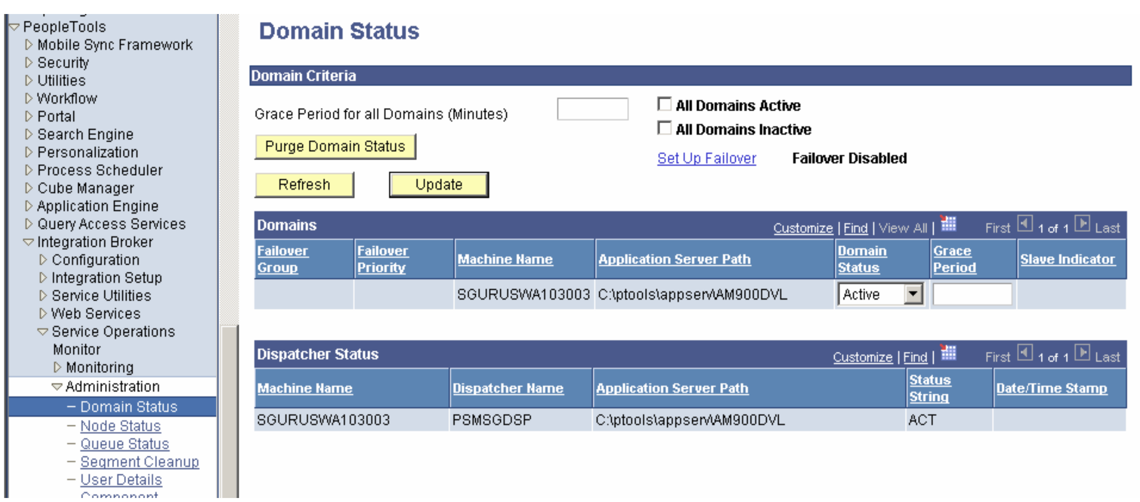
After configuring your app server, you need to activate your domain through PIA to ensure Handler and Dispatcher pick up your asynchronous messages.

To activate your domain:

1. Navigate to PeopleTools → Integration Broker → Service Operations Monitor → Administration → Domain Status.

2. Click the **Purge Domain Status** button.

3. Search for your domain and make the Domain Status *Active*. Then, click the **Update** button.

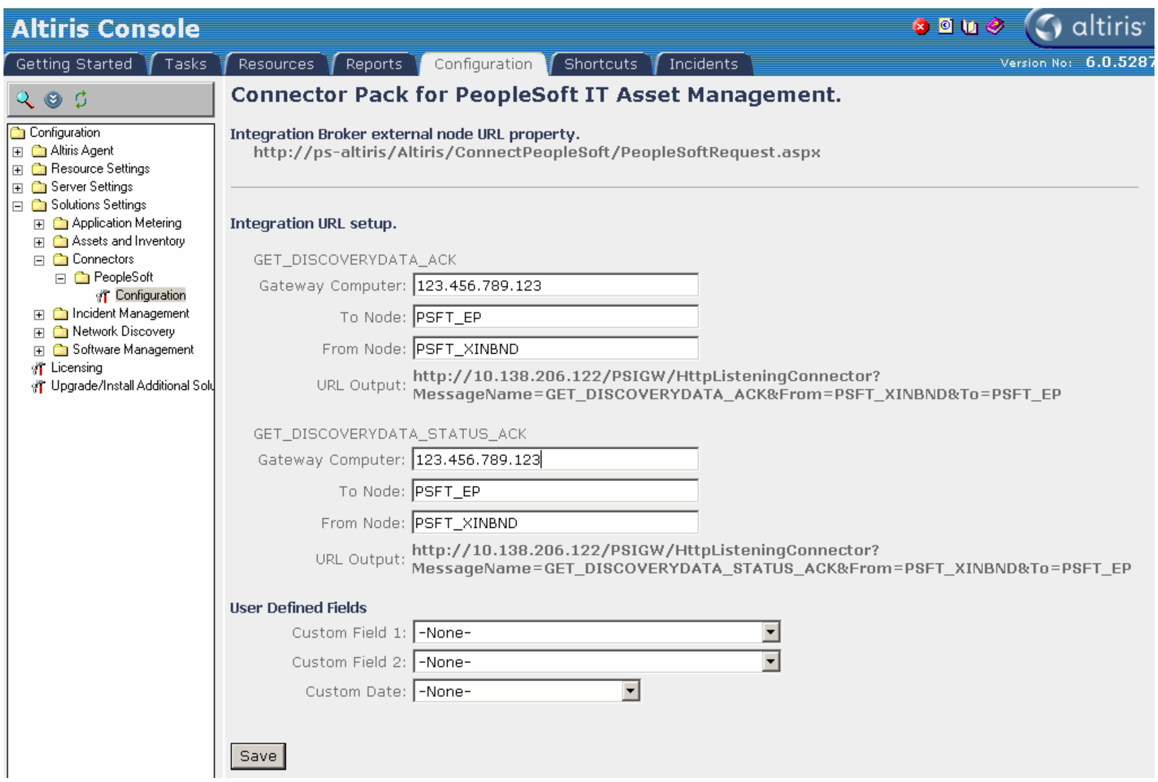


Domain Status page

Task 18-8: 3rd Party Integration Setup

To set up 3rd party integration:

1. Navigate to the Altiris Console. Start → Programs → Altiris → Altiris Console.
2. Navigate to: Solution Settings → Connectors → PeopleSoft → Configuration.
3. Enter the *<PIA Webserver>:<Port Number>* in the **Gateway Computer** field.
4. Enter your Default Local Node in the **To Node** field (PSFT_EP).
5. Enter *PSFT_XINBND* in the **From Node** field.
6. Click **Save.**



Altiris Console

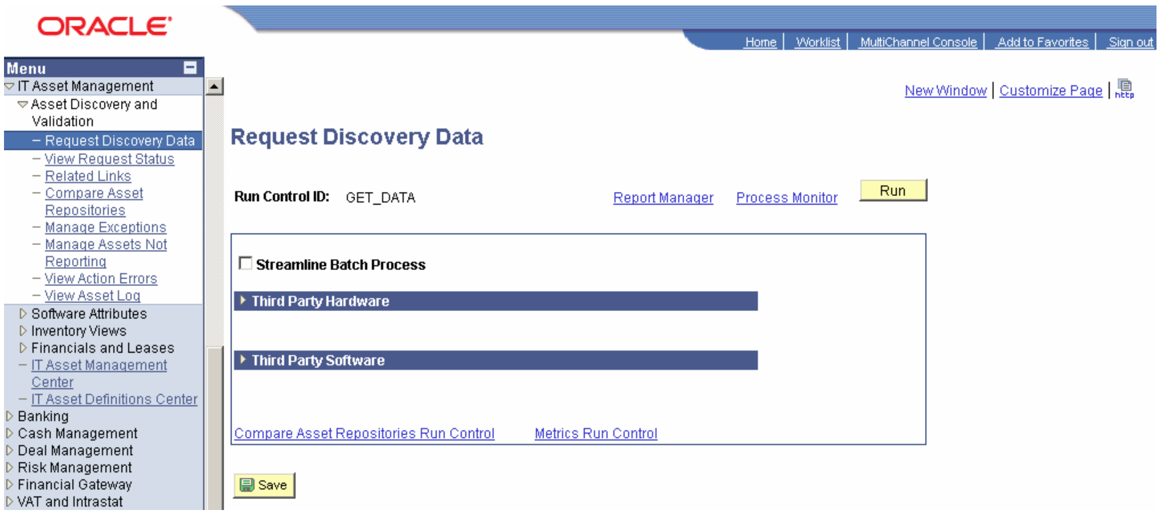
Task 18-9: Verify the Integration

To verify the integration:

1. From PeopleSoft, initiate a request for discovered inventory from Altiris.

2. Navigate to: IT Asset Management → Asset Discovery and Validation → Request Discovery Data.

3. Add a new Run Control ID. Click **Add.**

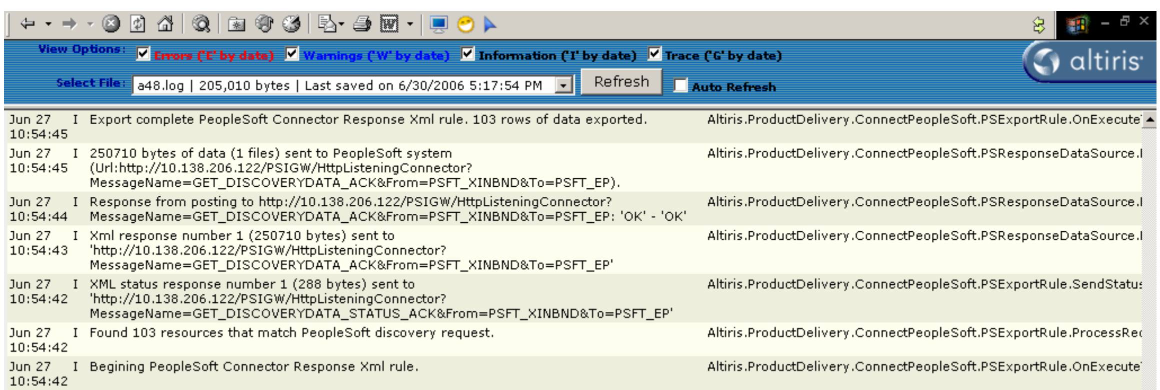


Request Discovery Data page

4. Click the **Run** button.

5. Click **OK** on the Process Scheduler Request page to submit the process.

6. Query the Altiris Logview file (http://123.456.789.123/altiris/NS/LogView.asp). If the XML Request was successfully received and processed by Altiris, you should see the following output:

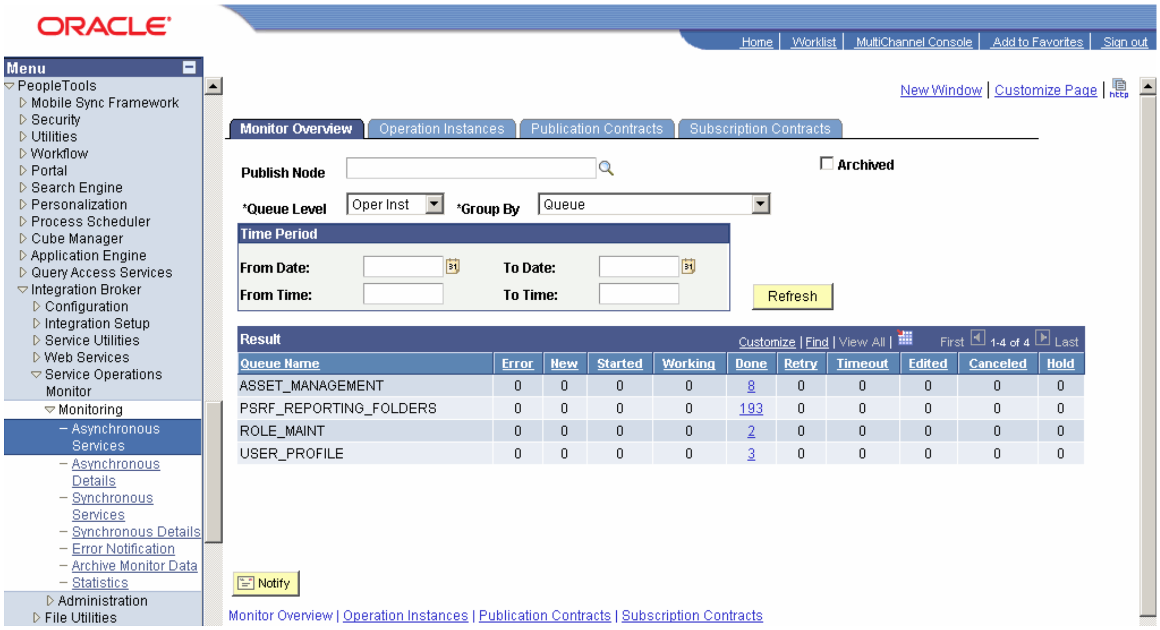


Output

> **Note.** The number of rows of data exported will vary depending on the sample data installed in the Altiris Inventory Solution.

If you do not see any output or you wish to verify PeopleSoft Integration Broker correctly published the Request, perform the remaining steps:

7. Navigate to: PeopleTools → Integration Broker → Service Operations Monitor → Monitoring → Asynchronous Services.



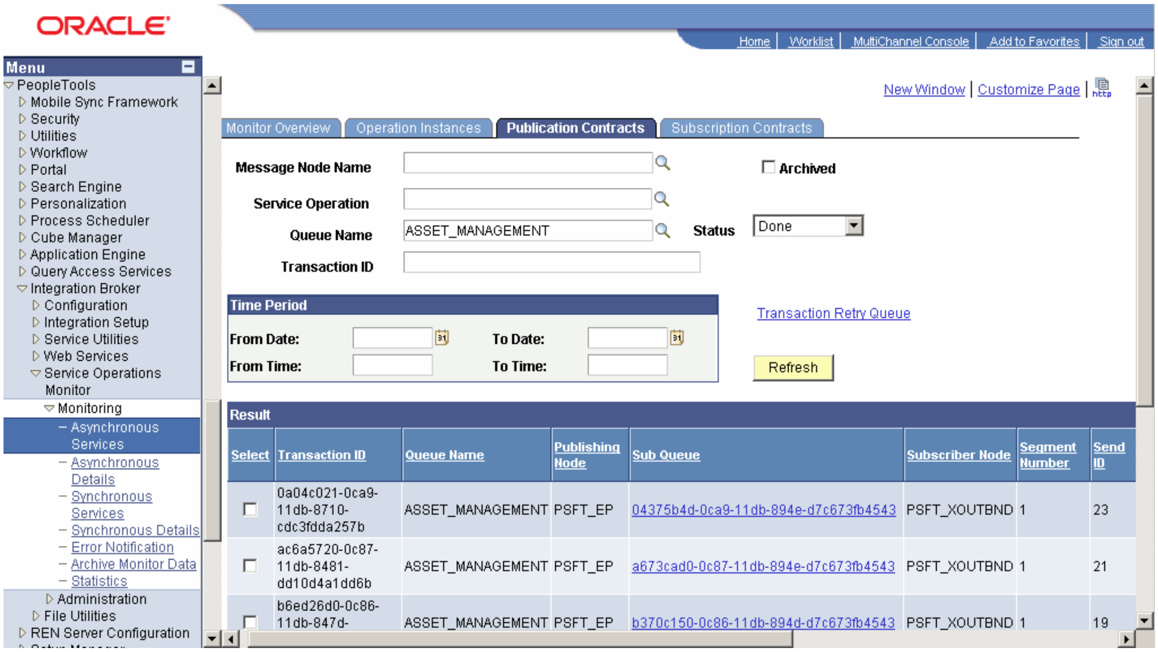
Monitor Overview page

8. Select the Publication Contracts tab.

9. Select *ASSET_MANAGEMENT* from the **Queue Name** prompt.

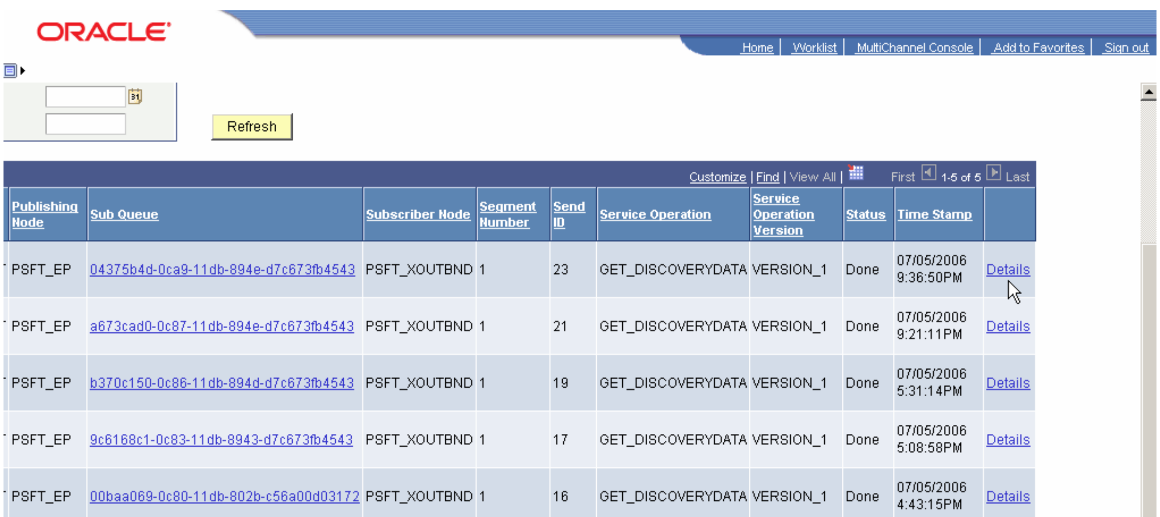
10. Select *Done* for the *Status* field.

11. Click the **Refresh** button.



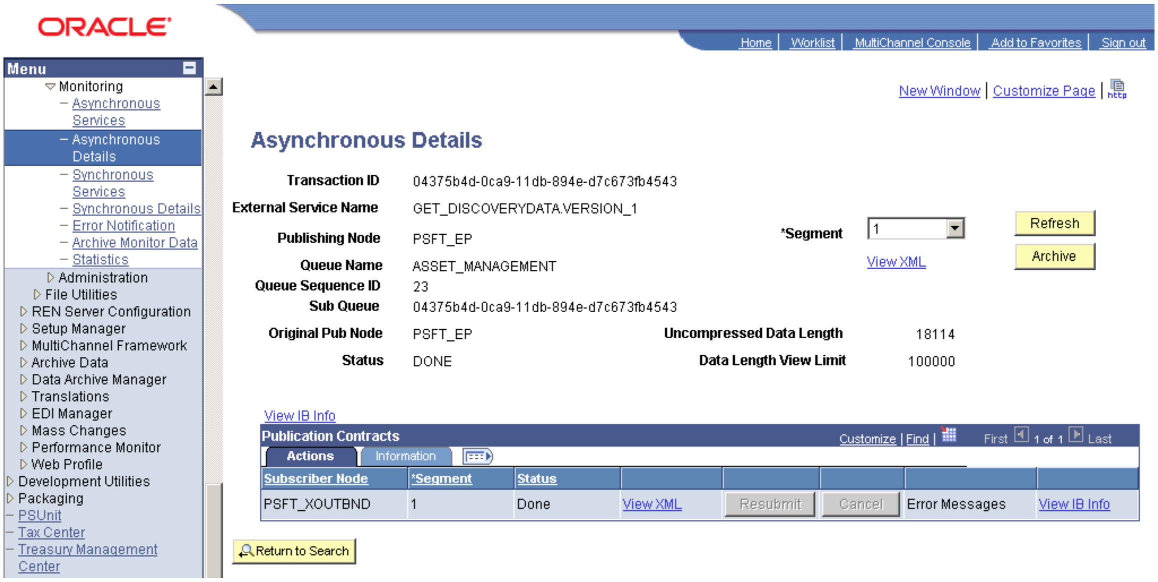
Publication Contracts tab

12. Find the *GET_DISCOVERYDATA* service operation and click the **Details** link in the right-most column in the grid.



Publication Contracts tab

13. This launches a new browser session displaying the Asynchronous Details.



Asynchronous Details page

HTTPTARGET Connector Properties

*Property ID	*Property Name	Required	Value	Default
HEADER	sendUncompressed	Y	Y	Y
HTTPPROPERTY	Method	Y	Post	Y
PRIMARYURL	URL	Y	http://<AltirisHost>/Altiris/ConnectPeopleSoft/PeopleSoftRequest.aspx	N

Peoplesoft delivered Routing Definitions for PSFT_EP Node

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

C H A P T E R 1 9

INTEGRATING PEOPLESOFT ENTERPRISE 9.0 TRAVEL AND EXPENSE WITH TRAVEL PARTNER SOLUTIONS (OPTIONAL)

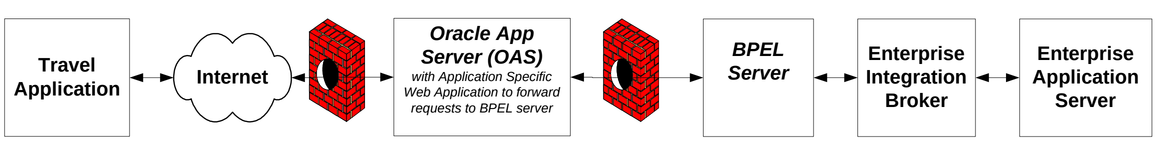
Peoplesoft 9.0 Travel and Expense can integrate with third party travel solutions, which provides the following functionality:

- Links to the travel application from within the Expenses menu systems.
- Synchronization of employee data with the travel profiles.
- Import travel reservations into Expenses.

This is an optional integration and in Release 9.0 the Travel and Expense application provides a sample integration with Aergo the Amadeus Space Management Solution.

Customers integrating with Aergo need to purchase Licensing directly from Amadeus, before the proceeding further with this installation. Additionally further customization of the sample application may be required to accommodate customer specific requirements.

The diagram below shows a typical configuration and some high level data flow for the exchange of profile and reservation information:



Red brick symbol represents a network firewall

Travel Integration components:

- Enterprise Integration Broker. The Integration Broker (IB) is the standard Enterprise technology for integrating to external services. In the Travel & Expense integration with Travel vendors, IB is used to consume and publish web services. In the case of the Aergo sample configuration, profiles are exchange when IB uses a web service provided on the BPEL server. Itineraries are obtained when BPEL utilizes a web service that is hosted by IB.

- Business Process Execution Language (BPEL) Server. The Oracle BPEL server is hosted within a J2EE container such as Oracle Application Server. This document will assume that OAS is used. The BPEL server is used to coordinated the exchange of profiles and itineraries. In the Aergo sample application, BPEL will consume a web service provided by IB to send itineraries to the Travel and Expense application. Profiles are sent to the travel vendor when IB uses a web service provided by the BPEL server. Almost all travel partner specifics should be implemented as partner links in the BPEL server.

- ReceivePNR web application. The ReceivePNR web application is a sample implementation that receives incoming itinerary messages from the travel partner. This web application can be hosted in any J2EE container. For the purposes of this document, it is assumed that the J2EE container is OAS. The web application provides a translation between the XML data posted over HTTP by the Aergo Travel application and the Business Process hosted in the BPEL server. If in the future the Aergo application is modified to support true web services this web application may become superfluous.

- Travel Application. The Travel Application is not provided by Oracle. It is a third party application that supports on-line travel booking. The capabilities of the travel application may vary from vendor to vendor. The Travel and Expense version 9.0 provides a sample application to integrate with the Aergo application as supplied by Amadeus S.A.

- Corporate Firewalls and Proxy Servers. Most corporate networks use a combination of fire walls and proxy servers to protect internal networks from unauthorized use. There are far too many variations to cover all possibilities here. For this document it is assumed that a proxy server is used for all outgoing IP traffic and that 2 firewalls are used to create a DMZ. It is expected that the ReceivePNR web application would be deployed in the DMZ and then use Oracle Remote Method Invocation (ORMI) to communicate with the BPEL server within the firewall.

Prerequisites

The synchronization of the travel profiles and exchange of reservation information is accomplished through the use of the Oracle BPEL server coupled with the Enterprise Integration broker. The BPEL server must be properly installed and configured. One often-overlooked item is the configuration of proxy server settings for the BPEL process when run inside the Oracle Application Server (OAS). Please carefully review the documentation for the OAS. For OAS version 10.1.2, the proxy settings must be passed into the Java Virtual Machine (JVM) as environment variables.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 19-1	Deploy BPEL Travel processes
Task 19-2	General Integration Broker configuration
Task 19-3	Configure Integration Broker for profile exchange
Task 19-4	Configure Integration Broker for itinerary exchange
Task 19-5	Deploy ReceivePNR web application to enable Aergo reservation exchange
Task 19-6	Configure Aergo properties
Task 19-7	Verify the Integration

Task 19-1: Deploy BPEL Travel processes

The BPEL process deployment and verification is described in the document *Financials_BPEL_Installation_Guide.doc.*

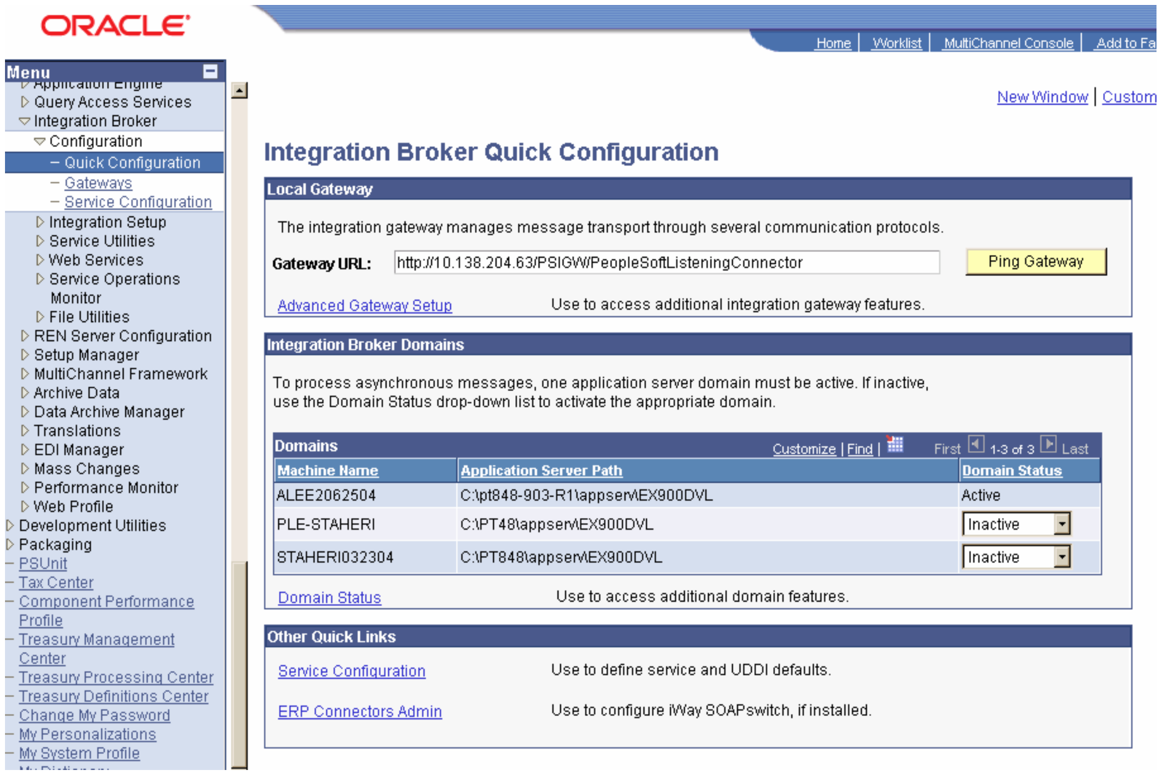
Task 19-2: General Integration Broker configuration

This step confirms that the settings for Quick Configuration, Gateways and Service Configuration are properly configured.

Quick Configuration

1. Navigate to PeopleTools → Integration Broker → Configuration → Quick Configuration.

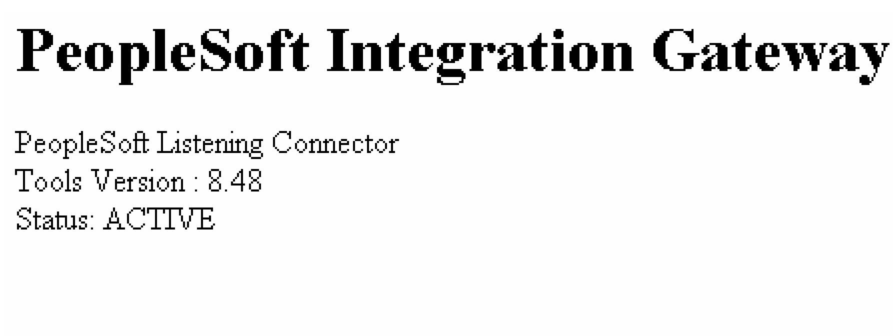
2. Change the Gateway URL to *http://<IB Hostname>:<port>/PSIGW/PeopleSoftListeningConnector*. The colon and port entry are optional if the port number is the default.



Integration Broker Quick Configuration page

3. Click **Save.**

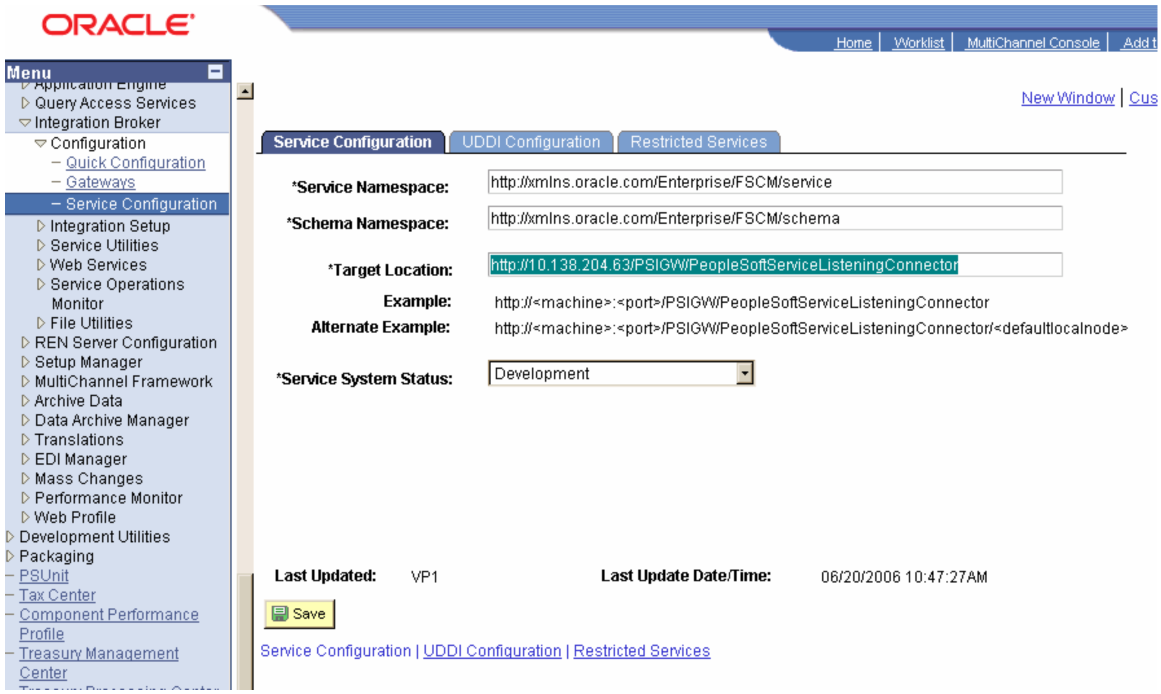
4. Ping the gateway to make sure that it is responding and note the exact tools version.



Service Configuration

1. Click on **Service Configuration** in the **Other Quick Links** group box.

2. Fill in the Target Location as *http://<IB Hostname>:<port>//PSIGW/PeopleSoftServiceListeningConnector*.



Service Configuration page

3. Click **Save.**

Gateways

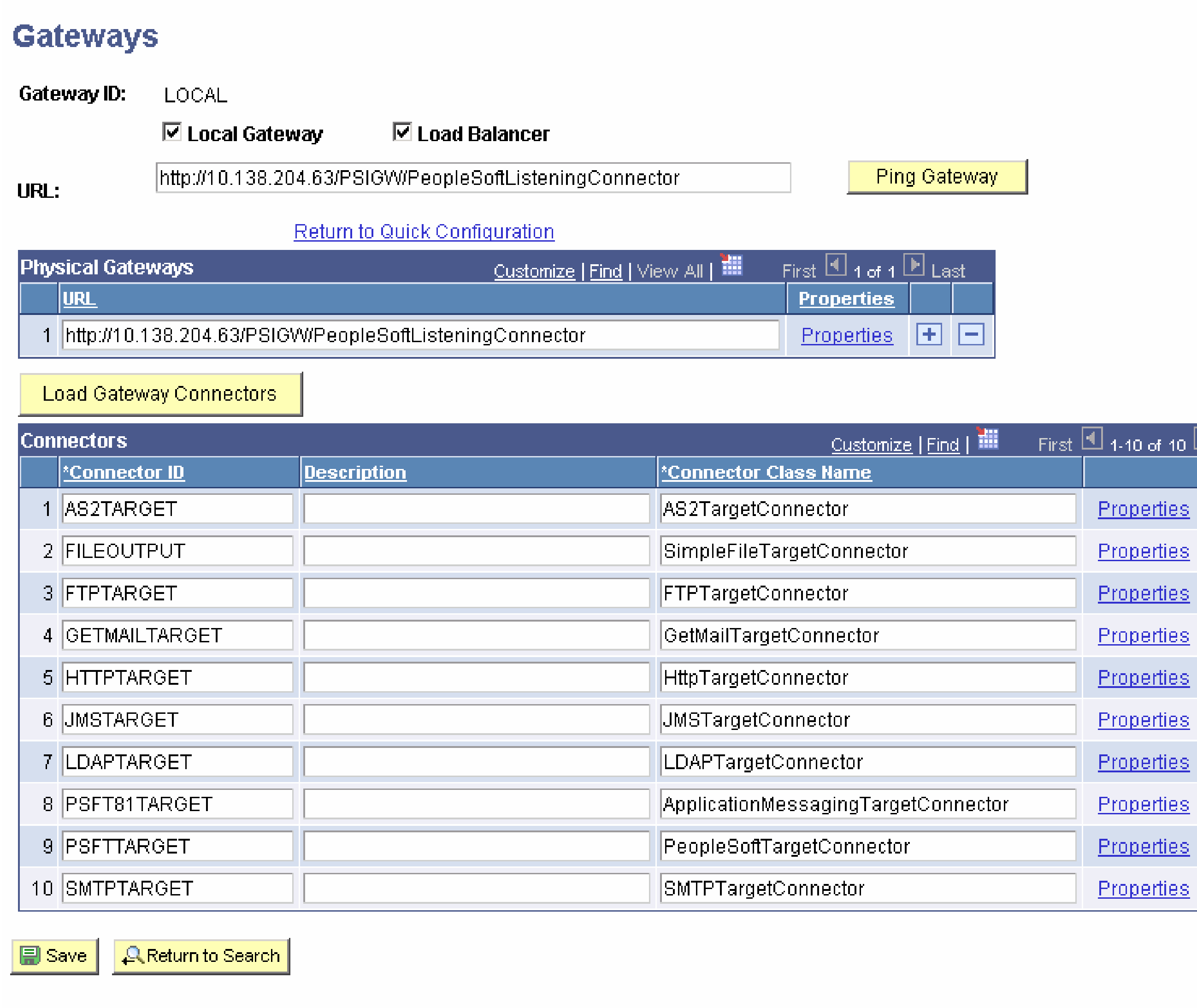
1. Navigate to PeopleTools → Integration Broker → Configuration → Gateways.

2. Enter the URL for the Local Gateway and the Physical Gateway as *Hostname>:<port>/PSIGW/PeopleSoftListeningConnector*.

3. Click **Load Gateway Connectors.**

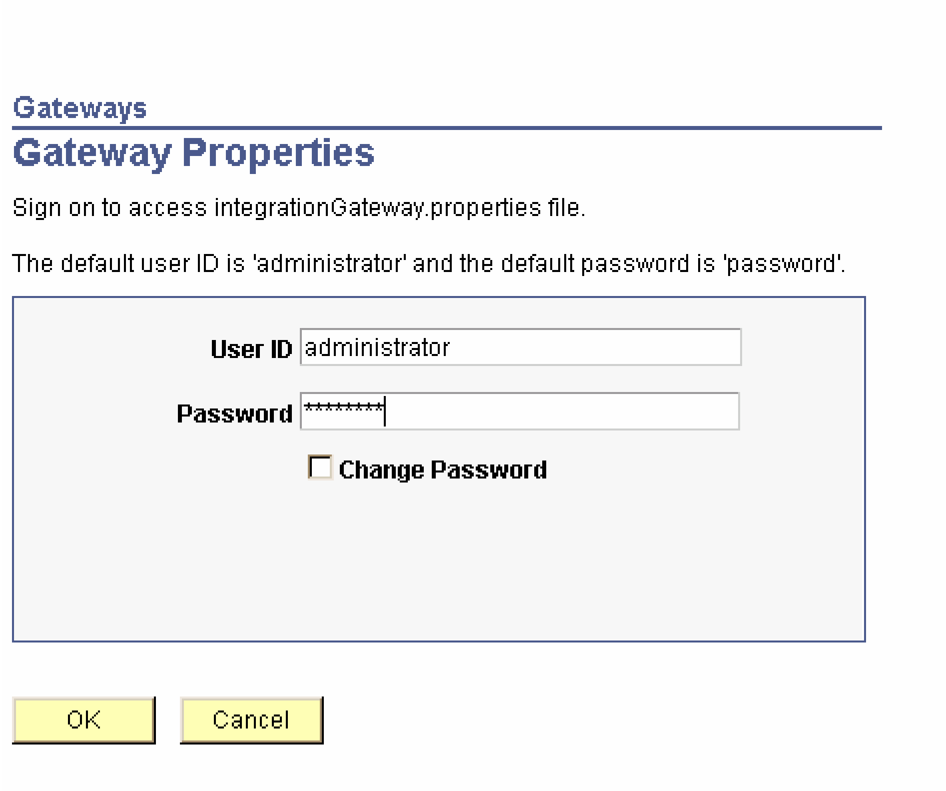
4. Click **Save.**

5. Click **Ping Gateway** to ensure connectivity and proper configuration.



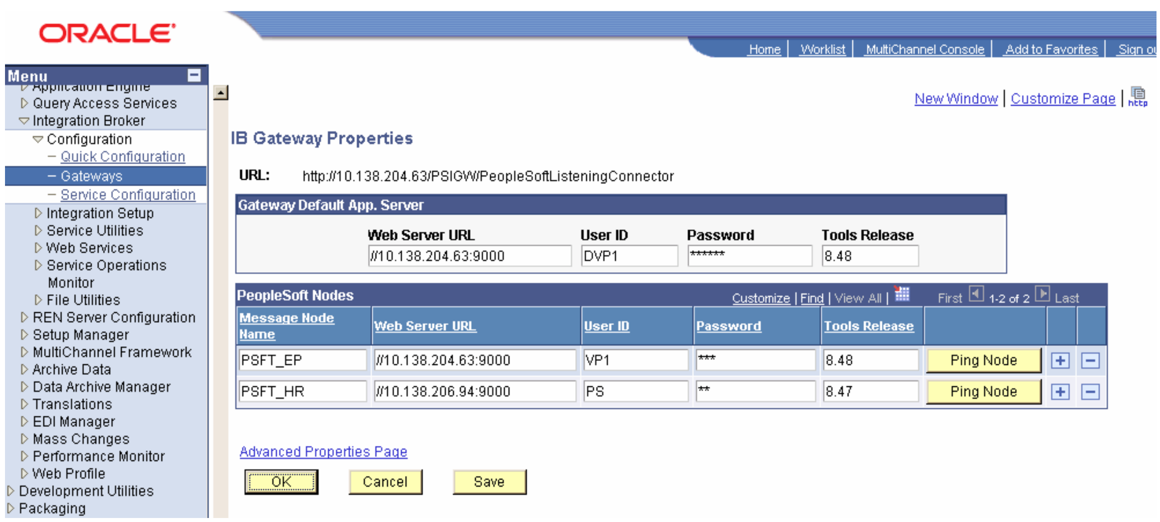
Gateways page

6. Click the **Properties** link and enter the administrator/password for user and password.



Gateways – Gateway Properties page

7. Add two Nodes: *PSFT_EP* (The FMS application server node) and *PSFT_HR* (The HCM application server node). Obtain the PeopleTools release from pinging the gateway as it must match exactly.



IB Gateway Properties page

8. Ping the PSFT_EP and PSFT_HR nodes to make sure they are responsive. You will see the following page if a ping is successful.

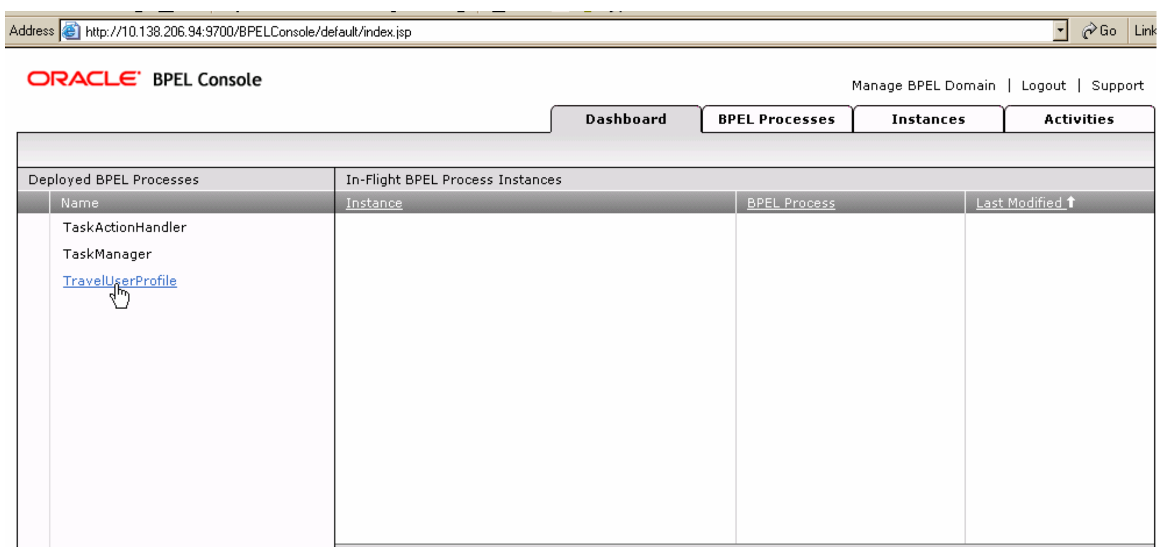
Ping Node Results page

Task 19-3: Configure Integration Broker for profile exchange

Get WSDL from the BPEL Console

1. Log into the BPEL Server Console and the domain that you have chosen for this integration. See the BPEL server documentation for details.

2. From the dashboard, click the **TravelUserProfile** process link.



BPEL Console

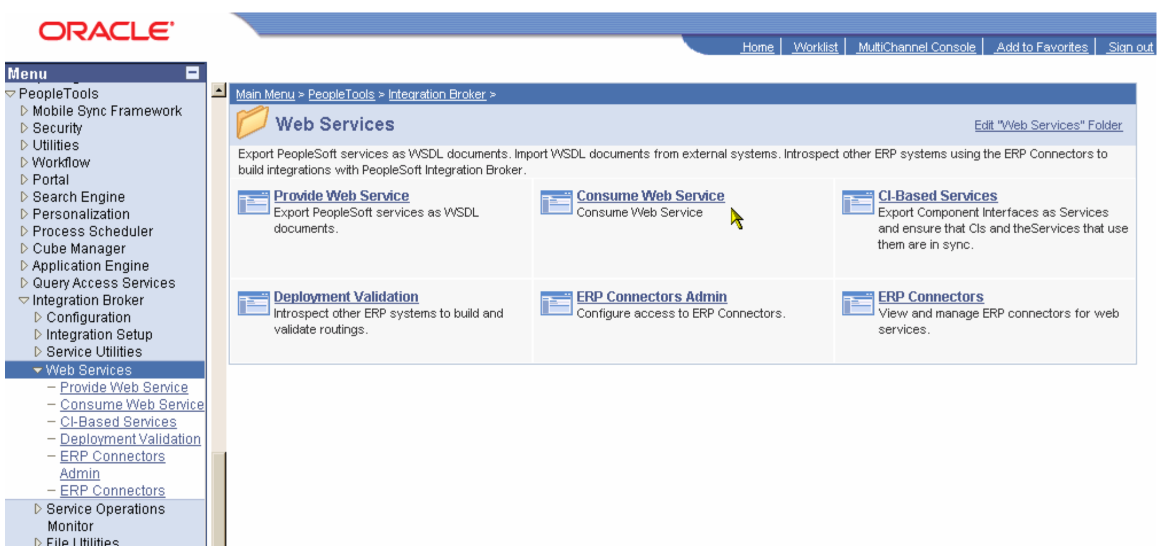
3. Click the WSDL tab.

BPEL Console – WSDL tab

4. Copy the text for the **WSDL Location.** This text string will be needed for the next step, Consume Web Service.

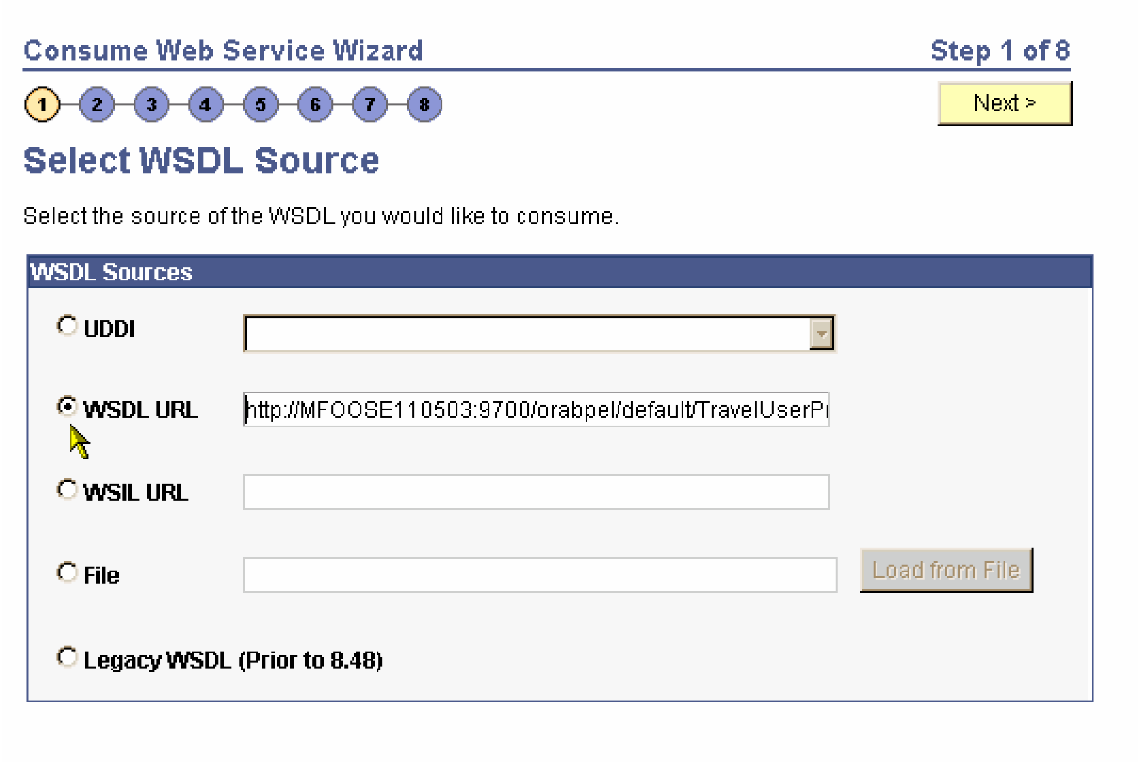
Consume Web Service

1. Navigate to PeopleTools → Integration Broker → Web Services → Consume Web Service. This will start the Consume Web Service Wizard.



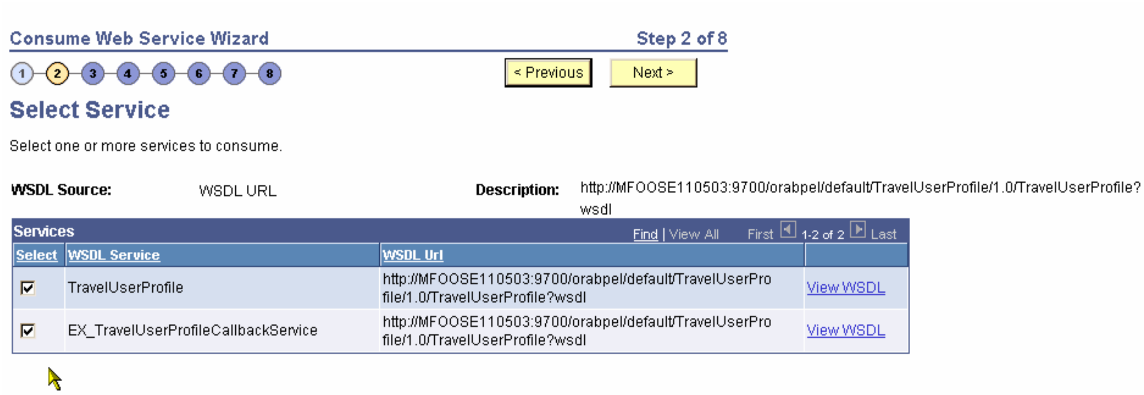
Web Services menu

2. Enter the WSDL Location copied from the BPEL Console in the step above.



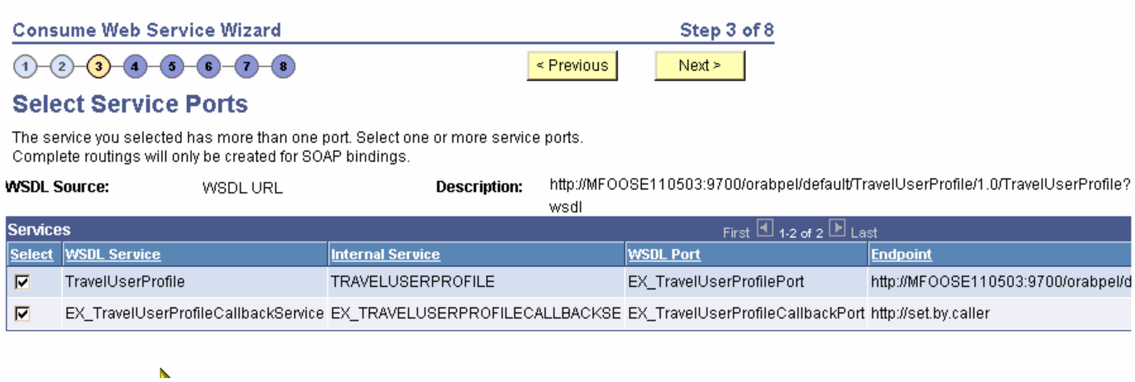
Consume Web Service Wizard - Select WSDL Source page

3. Select both services to consume.



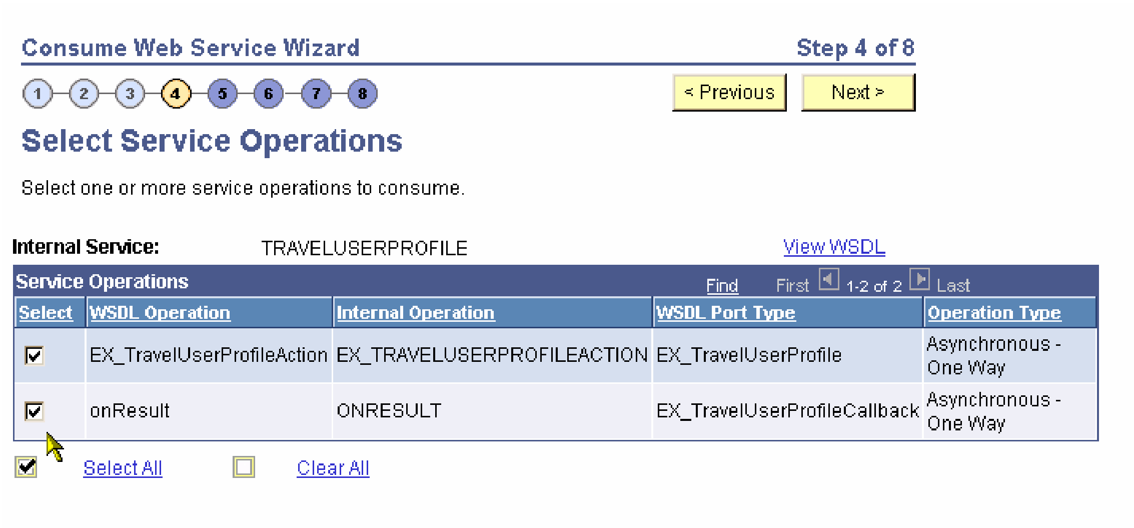
Consume Web Service Wizard - Select Service page

4. Select both Service Ports and then click **Next.**



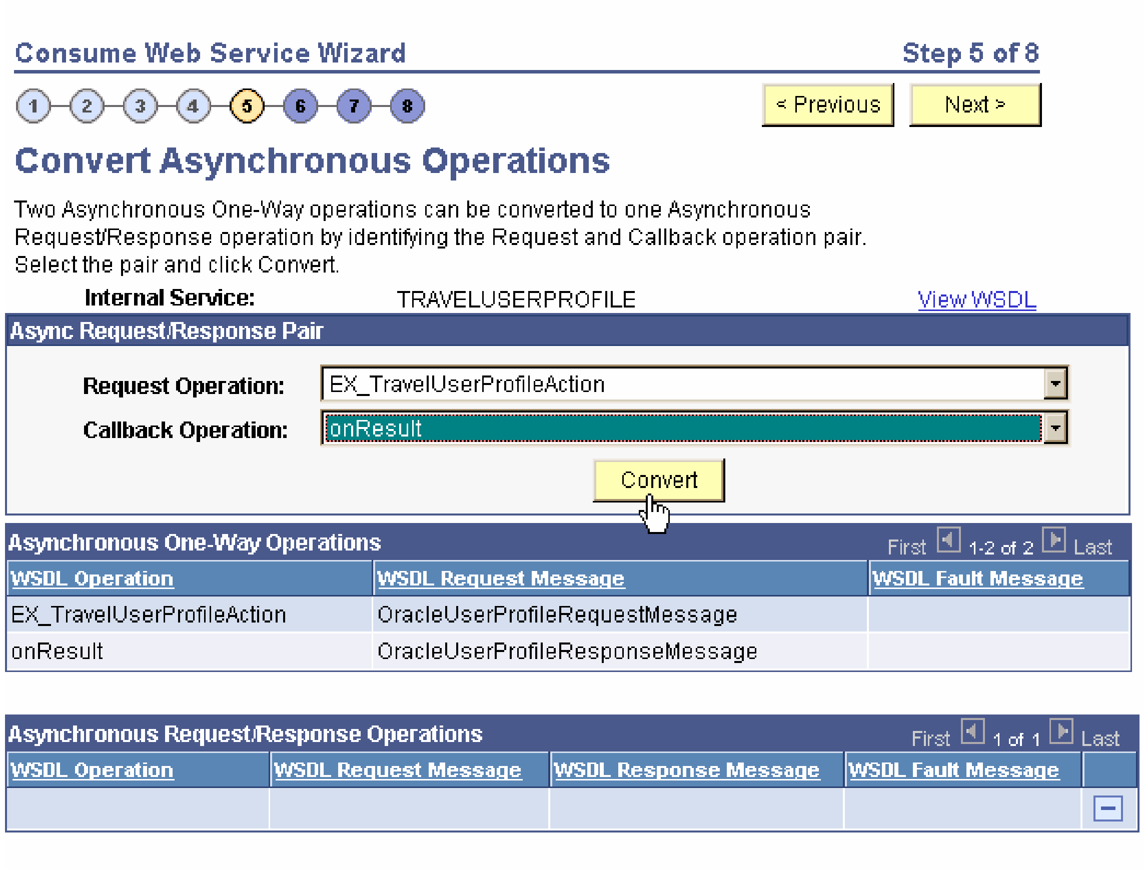
Consume Web Service Wizard - Select Service Ports page

5. Select both Service Operations and then click **Next.**

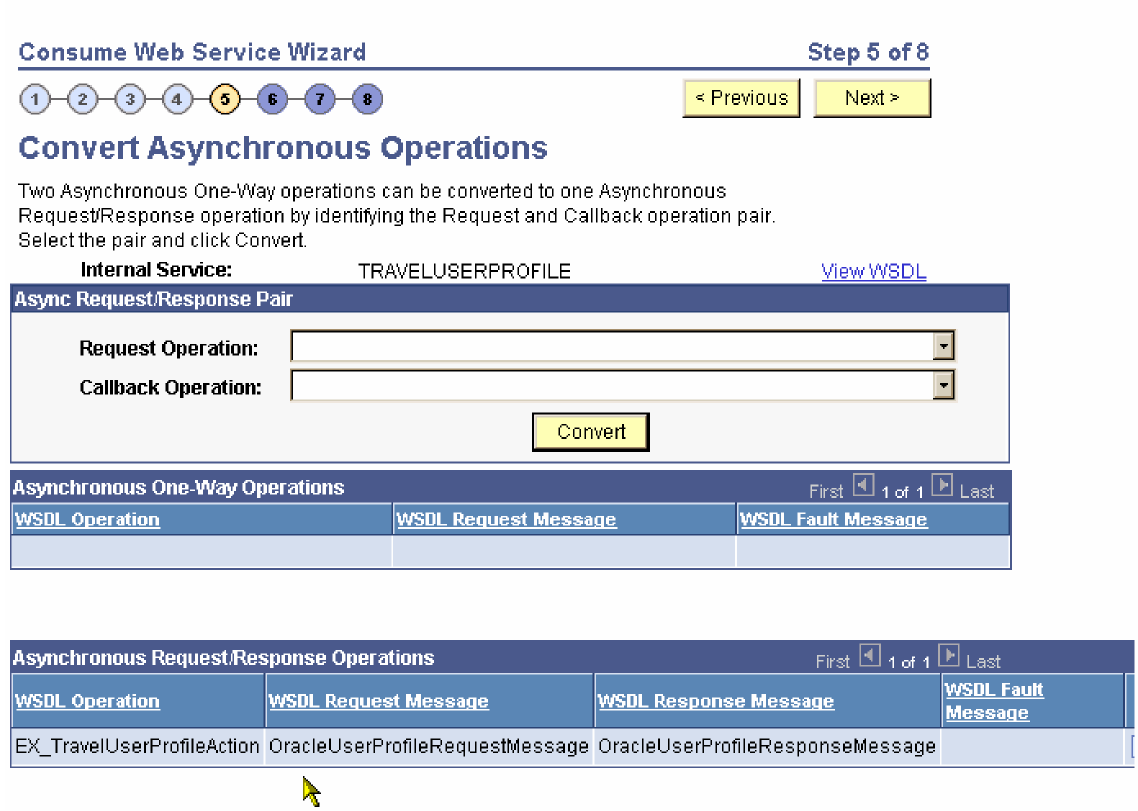


Consume Web Service Wizard - Select Service Operations page

6. Convert the one-way asynchronous service to a two-way asynchronous service.

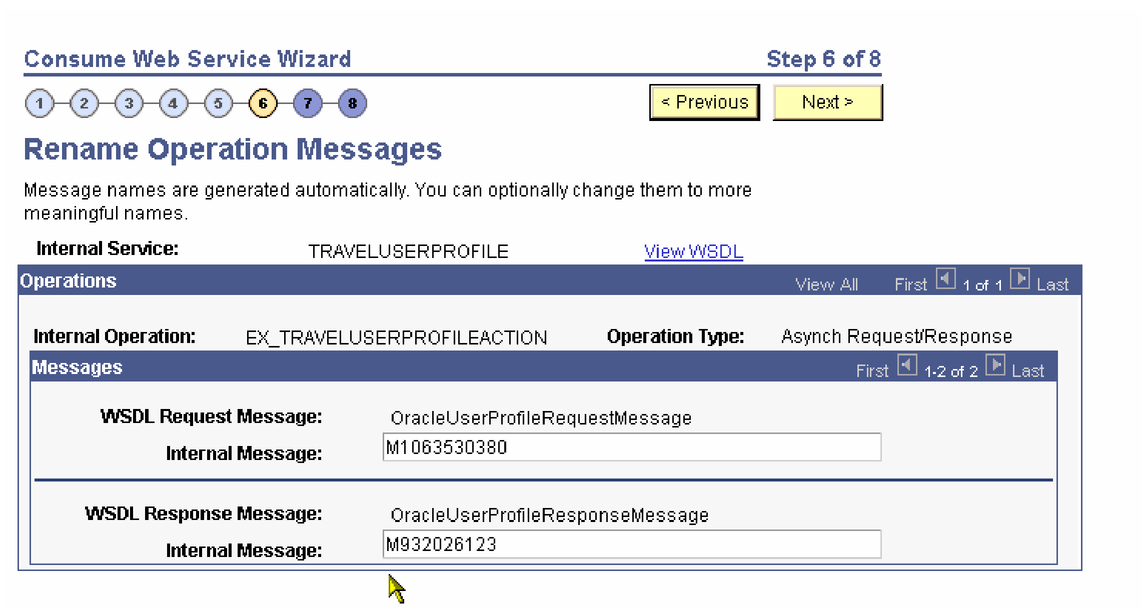


Consume Web Service Wizard - Convert Asynchronous Operations page



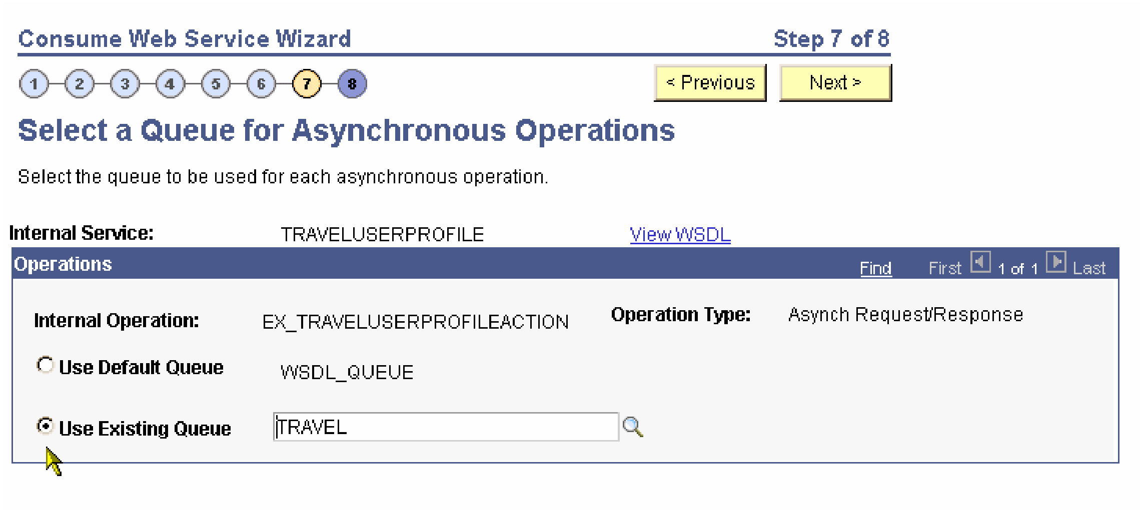
Consume Web Service Wizard - Convert Asynchronous Operations page

7. You can optionally rename the message to a more meaningful name. However, the screenshot below shows acceptance of the default name.



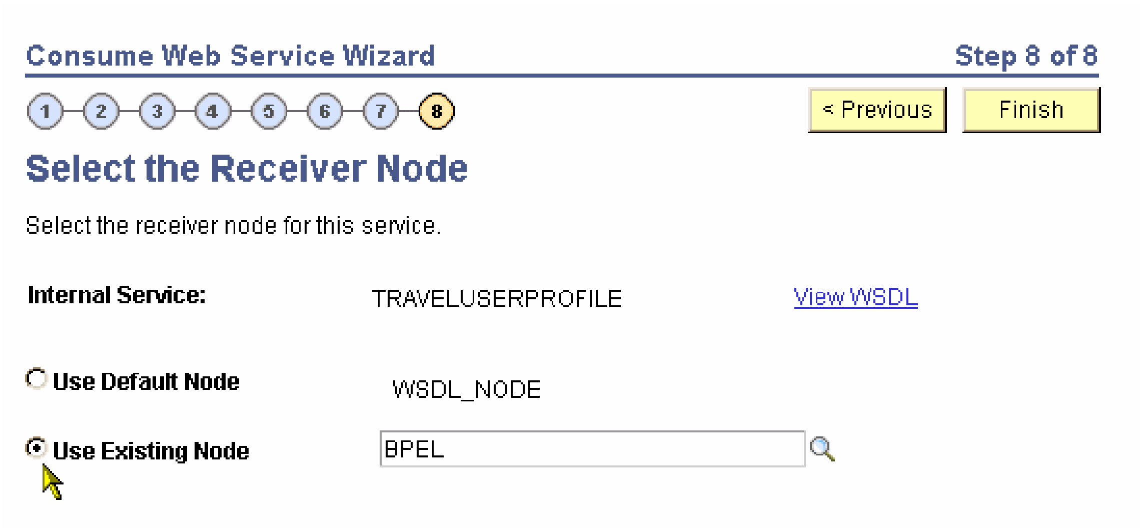
Consume Web Service Wizard - Resume Operation Messages page

8. Set the Queue (called Channel in previous versions of PeopleTools) for Travel services.



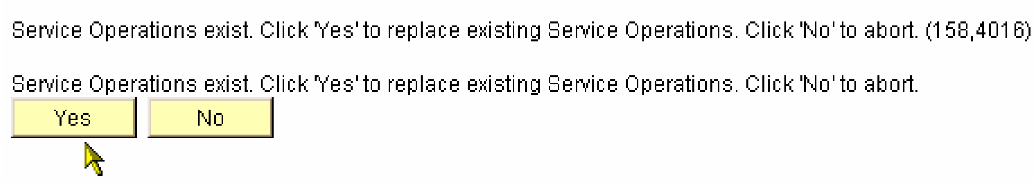
Consume Web Service Wizard - Select a Queue for Asynchronous Operations page

9. Set the receiver Node.



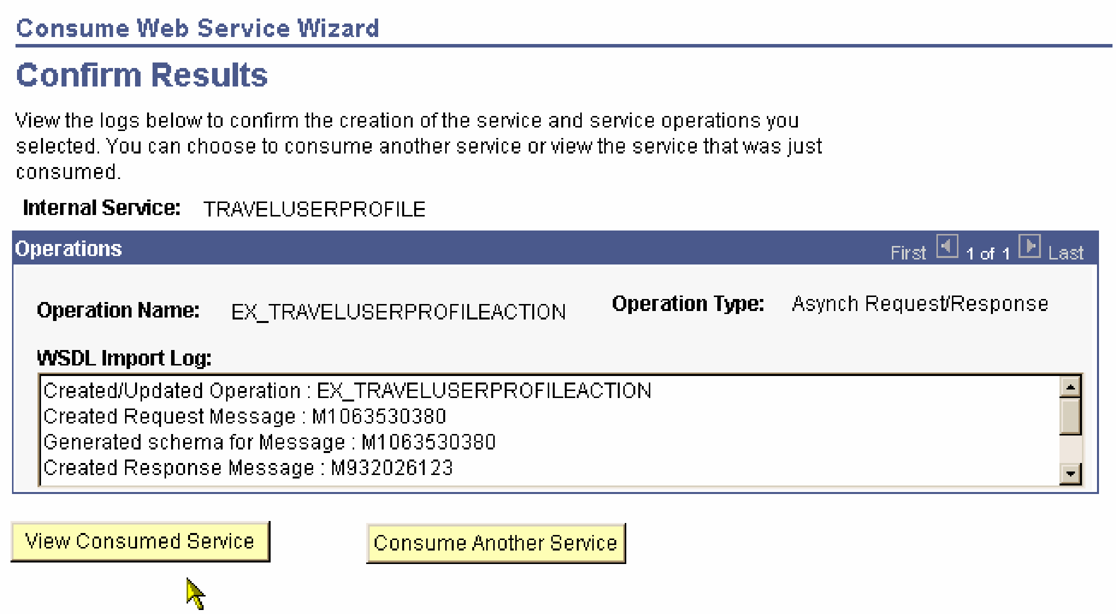
Consume Web Service Wizard - Select the Receiver Node page

10. If the Service operation exists, you will get this message. Answer **Yes.**



Service Operations Exist message

11. When finished, you will receive confirmation.

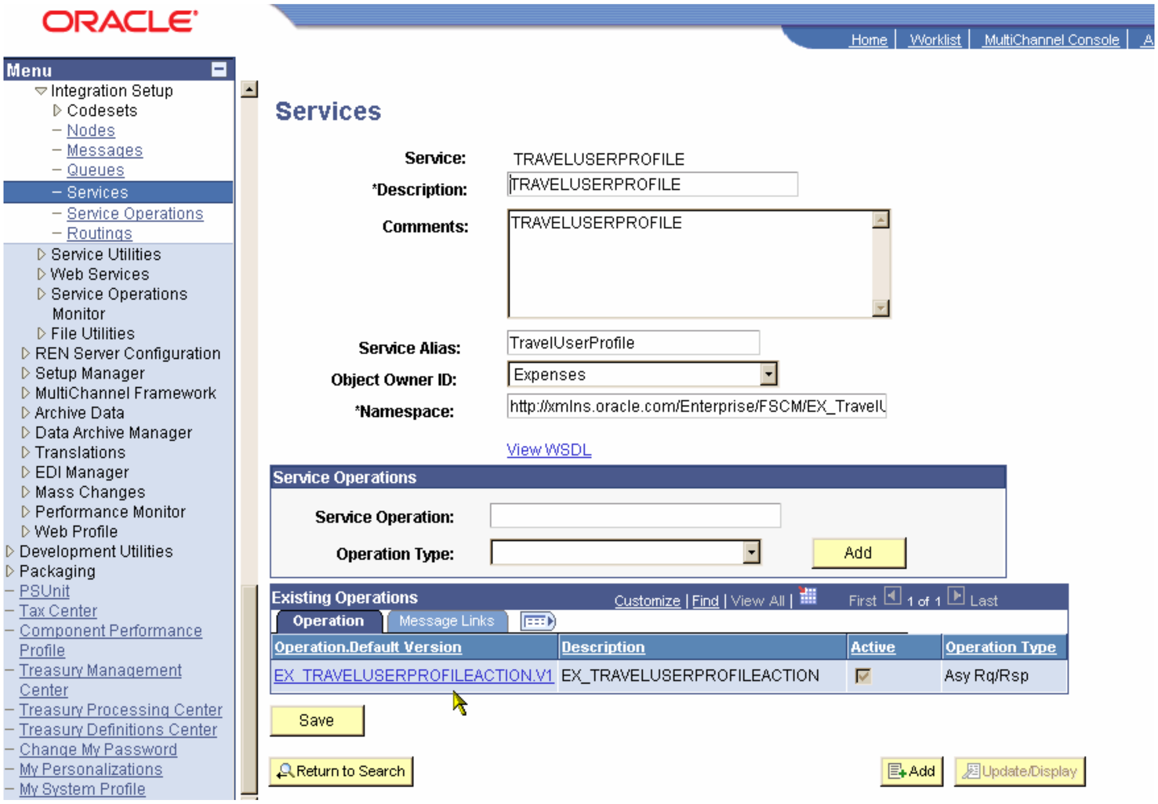


Consume Web Service Wizard - Confirm Results page

12. From here, select the **View Consumed Service** button, so that it can be setup. The system opens a new window.

Set up Service and Handlers

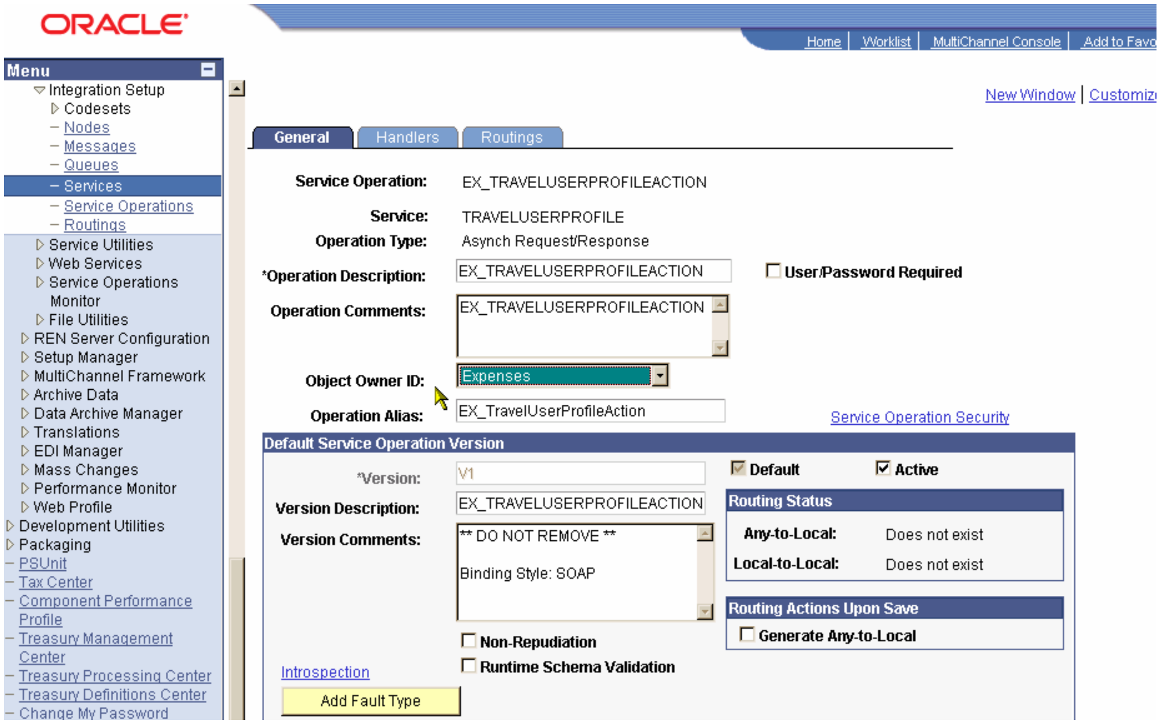
The figure below shows the Consumed Service configured above.



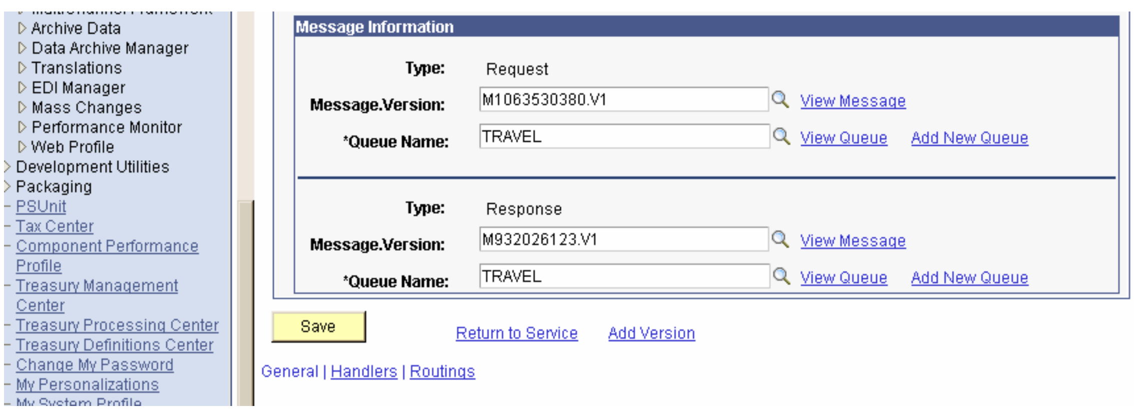
Services page

1. Update the Service Operations by clicking the link for **EX_TRAVELUSERPROFILEACTION.V1.**

2. Enter the Object Owner ID as *Expenses.*

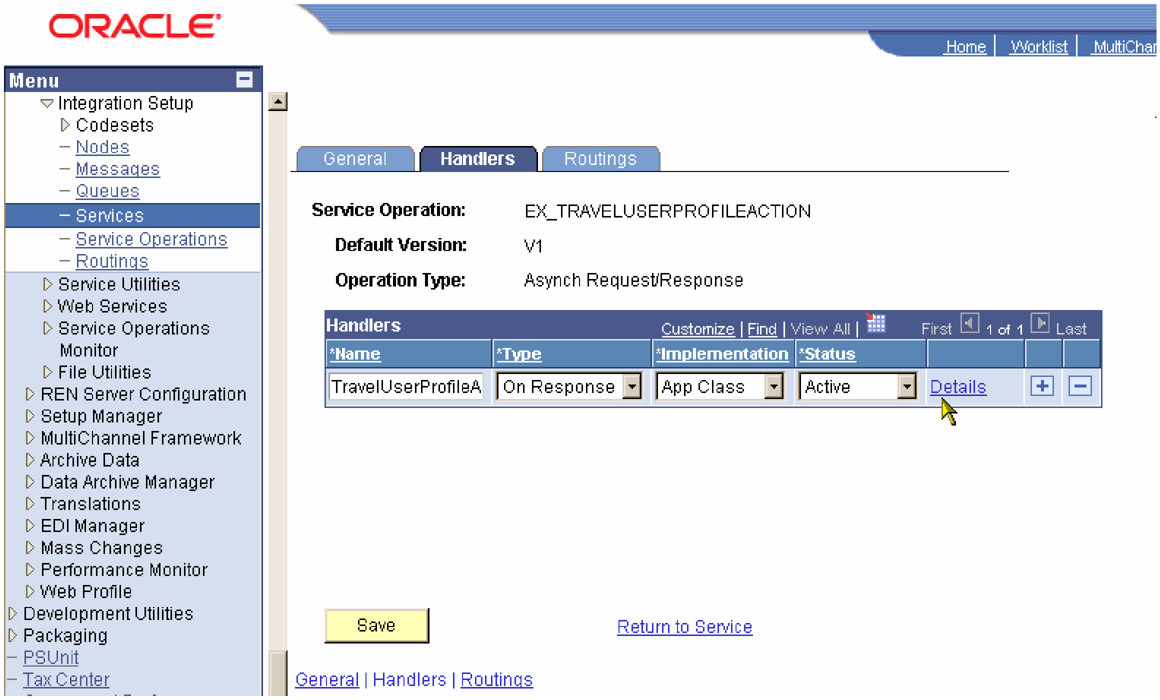


Services – General page (page 1 of 2)



Services – General page (page 2 of 2)

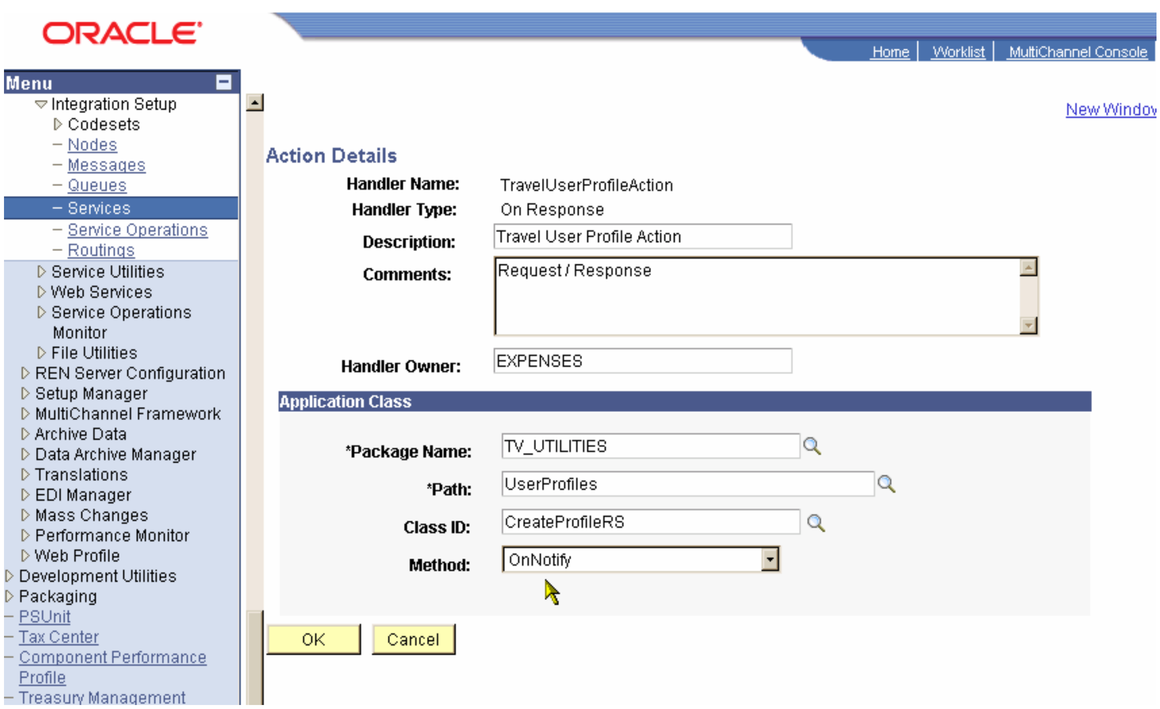
3. On the Handler Tab, enter the Name of *TravelUserProfileAction* and set the type to be *On Response*. Set the Implementation to *App Class* and the Status to *Active*. Click **Save.**



Handlers tab

4. Next, click the **Details** link.

5. Enter the fields as shown below:

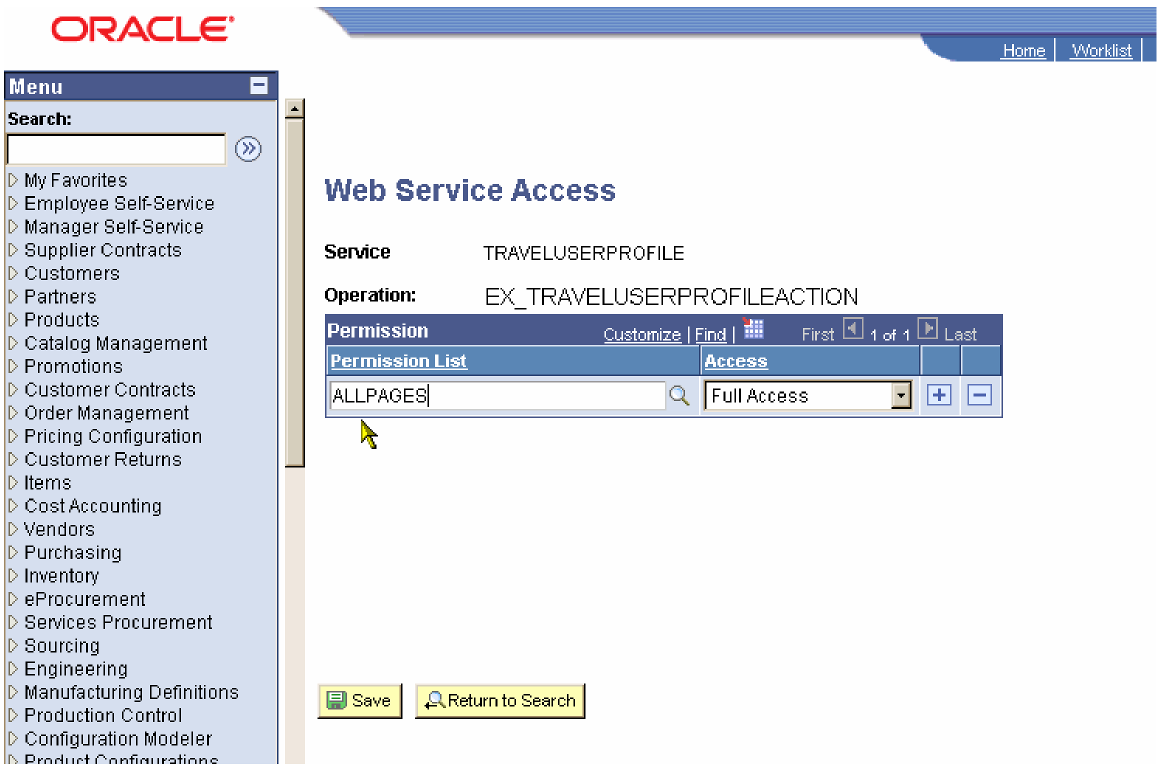


Actions Details page

6. Select the General tab again and click the **Service Operation Security** link.

7. On the Service Operation Security page, enter the *ALLPAGES* permission list. Set the **Access** field to *Full Access.*

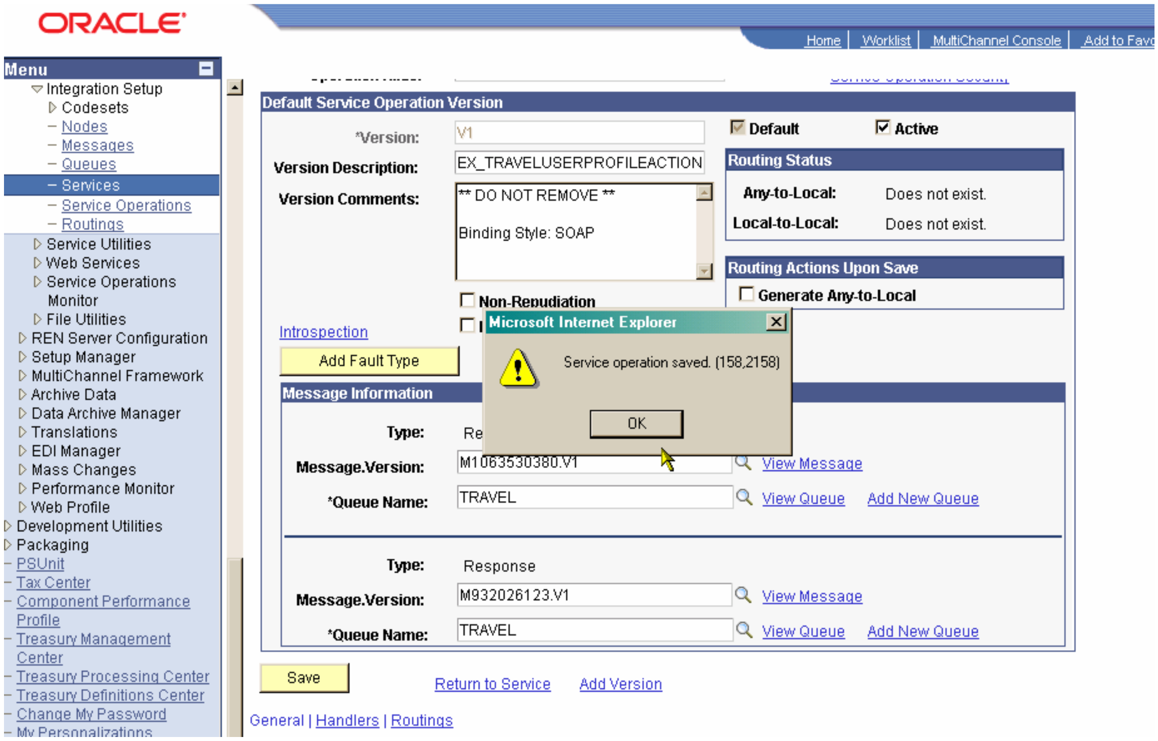
8. Save and then close the window.



Web Service Access page

9. Save the operation.

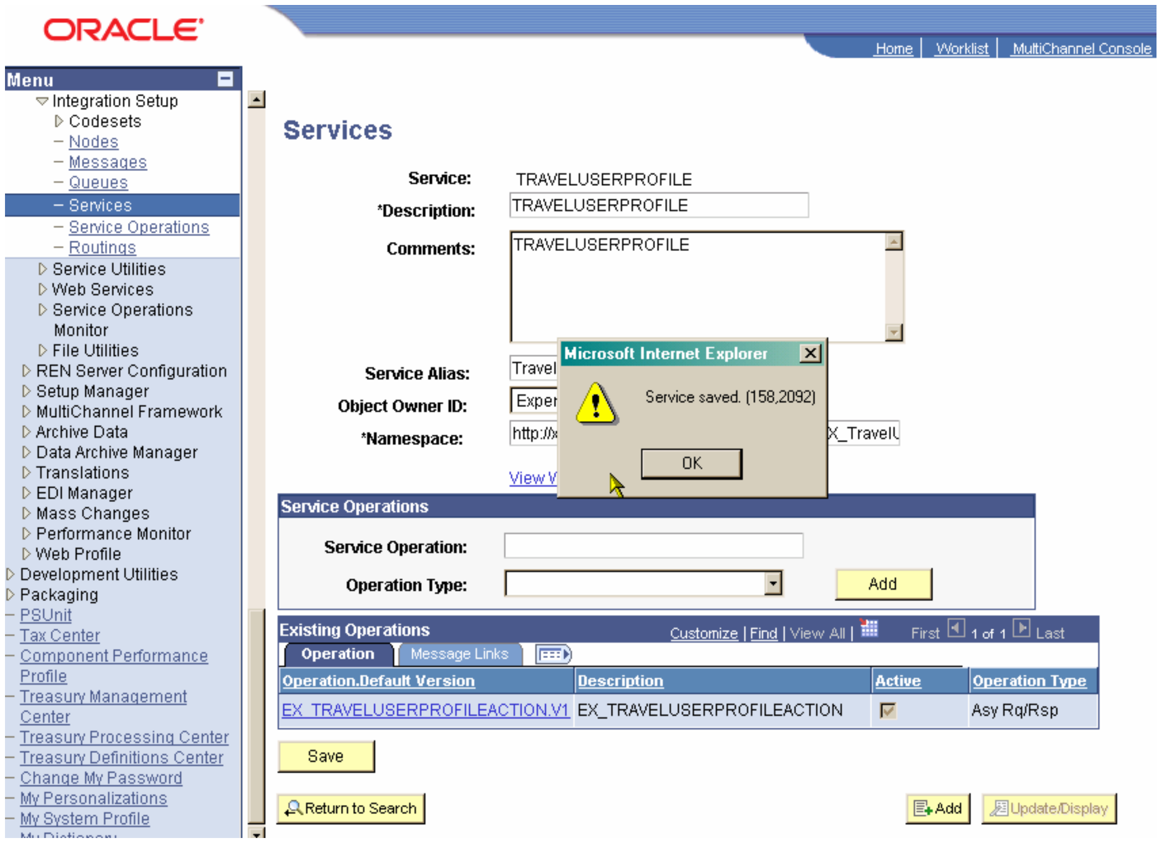
10. Save and then click the **Return to Service** link.



Services – General page

11. Save the service.

12. Save and close window.



Services page

Activate HCM messages (optional)

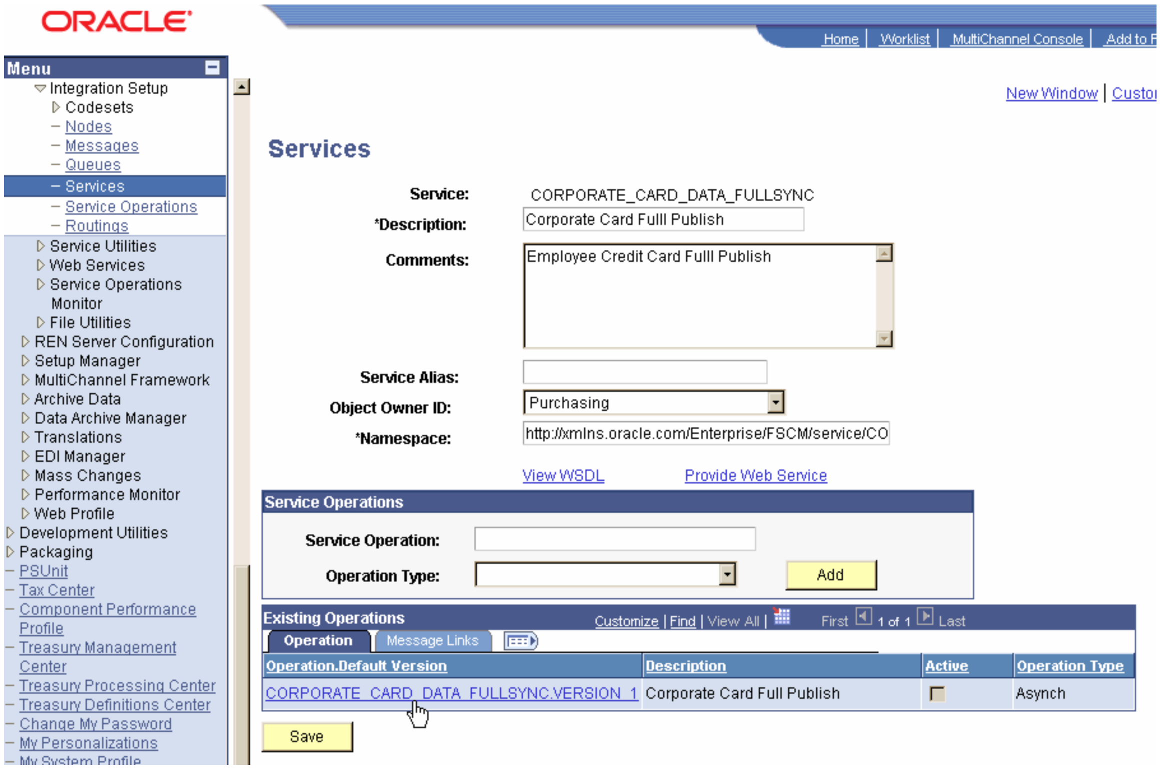
The Travel and Expense application can manage employee data or synchronize employee information with an Enterprise HCM instance. In order to allow the HCM data to drive the employee information, one must activate or confirm the activation of the HCM messages that Travel will use.

1. Navigate to PeopleTools → Integration Broker → Integration Setup → Services.

The Services needed are CORPORATE_CARD_DATA_FULLSYNC , CORPORATE_CARD_DATA_SYNC , CORPORATE_CARD_FULLSYNC , CORPORATE_CARD_SYNC , PERSON_BASIC_FULLSYNC, PERSON_BASIC_SYNC, PERSON_VISA_CITIZEN_FULLSYNC1, PERSON_VISA_CITIZEN_SYNC, WORKFORCE_FULLSYNC, and WORKFORCE_SYNC.

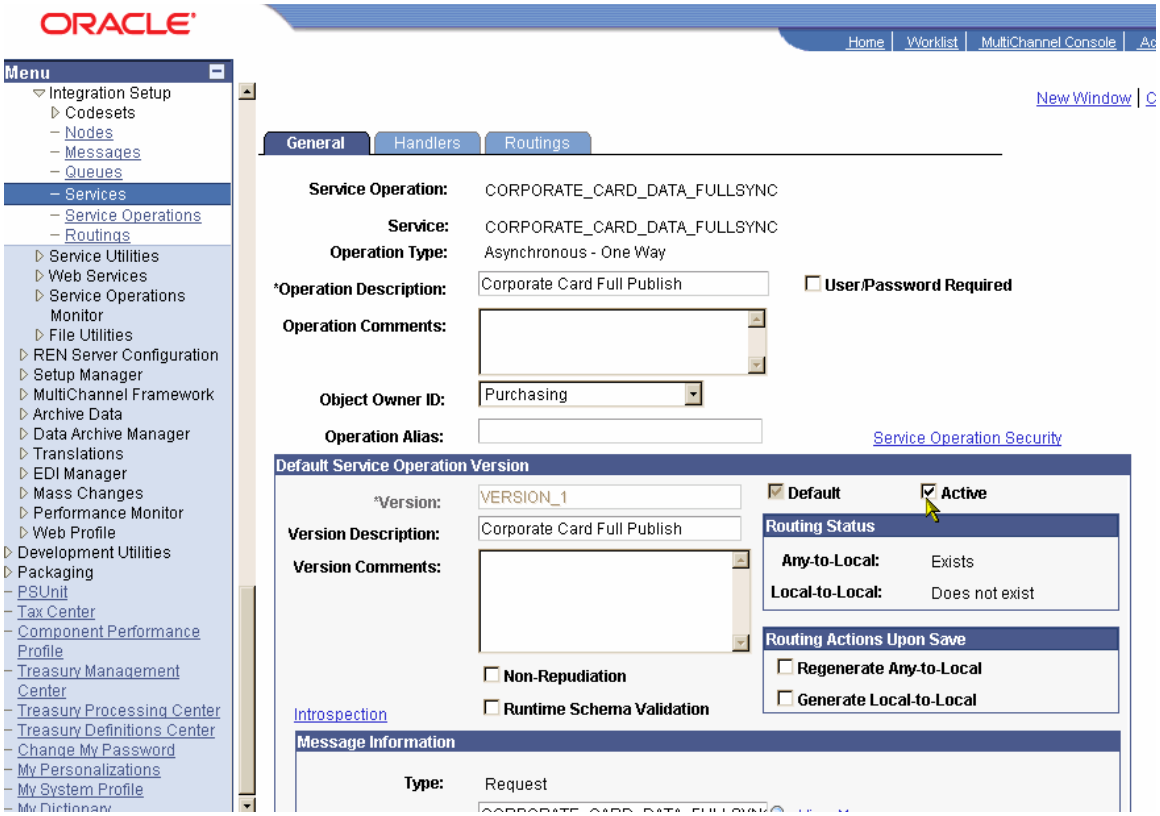
The CORPORATE_CARD_DATA_FULLSYNC service will be used below as a sample to be followed with the other services.

2. From the Services page, click the **Operation** link (Note that the **Action** check box is unselected).



Services page

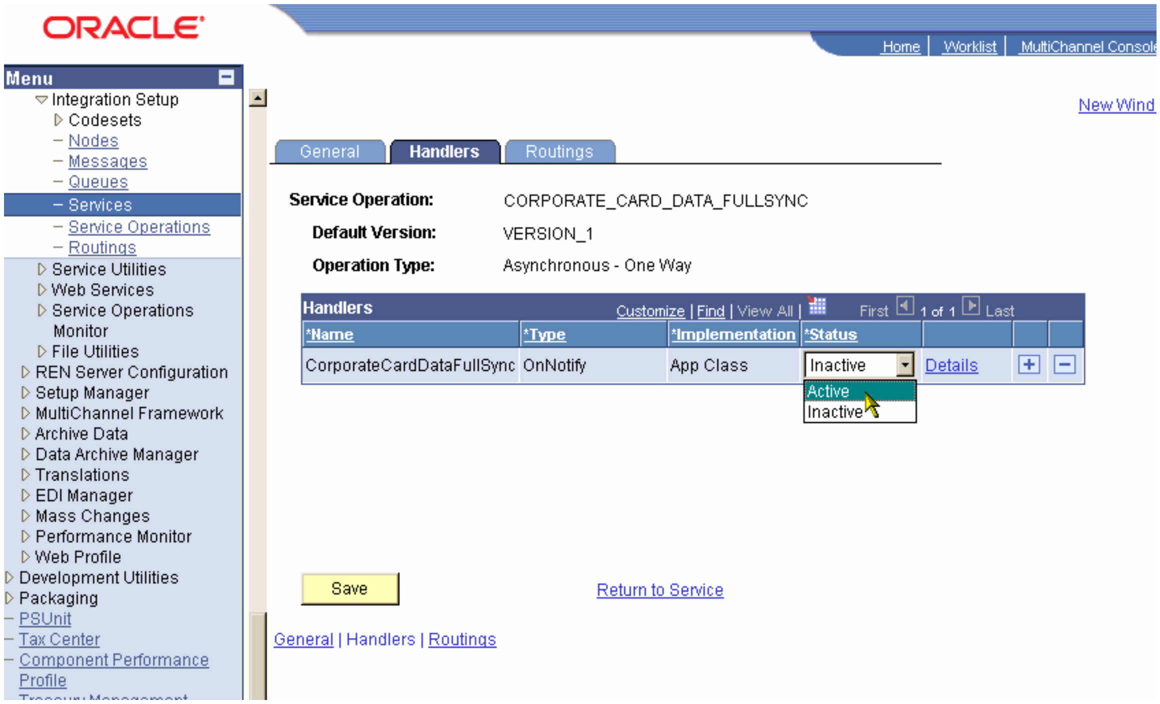
3. Turn on the **Action** check box.



Services – General page

4. Select the Handlers tab.

5. Change the Status to *Active* for the handlers.

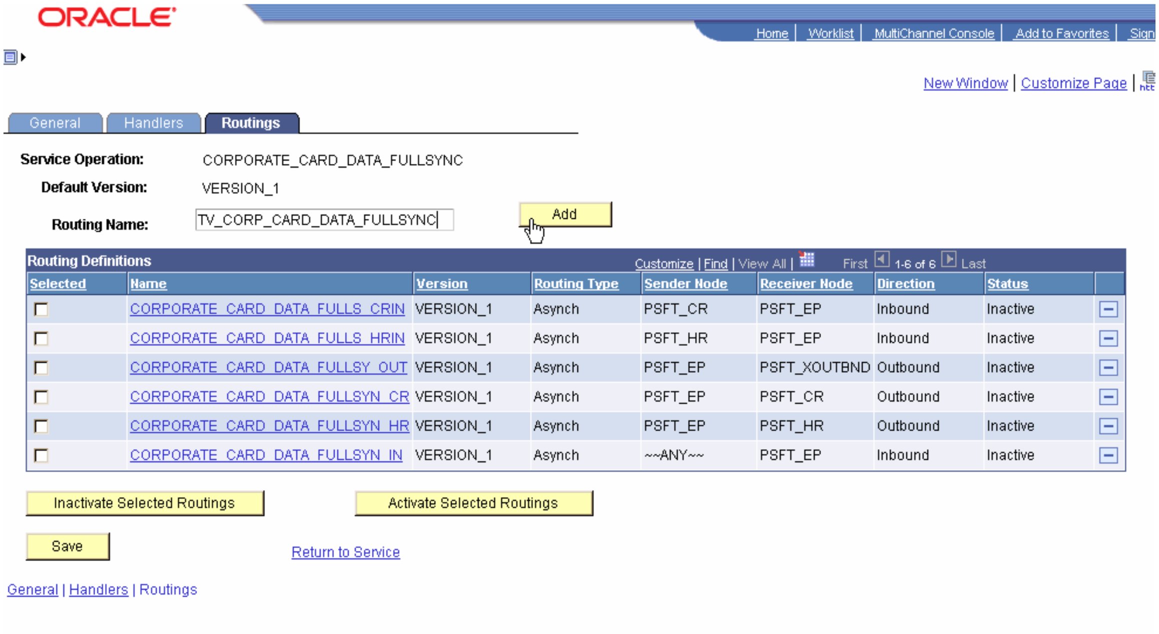


Handlers tab

6. Select the Routings tab.

   It should now be possible to activate the routing that is inbound (going from PSFT_HR to PSFT_EP) for this message by selecting the **Selected** checkbox for the routing and clicking the **Activate Selected Routings** button.

7. Enter a Routing name for your routing. Using *TV_* and as much of the operation name as will fit is a good convention. Then, click **Add.**



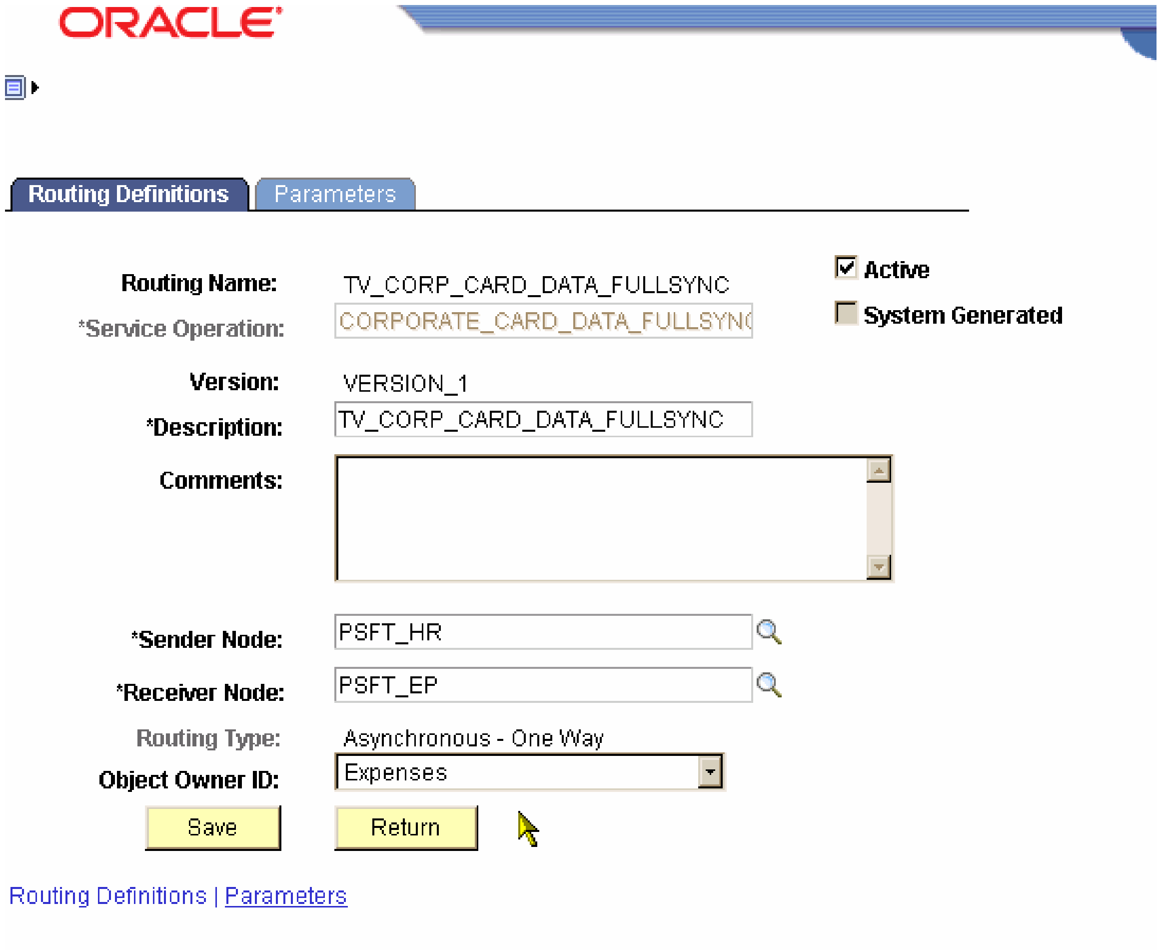
Routings tab

8. Enter the Sender Node (The HCM node).

9. Enter the Receiver Node (The FMS node).

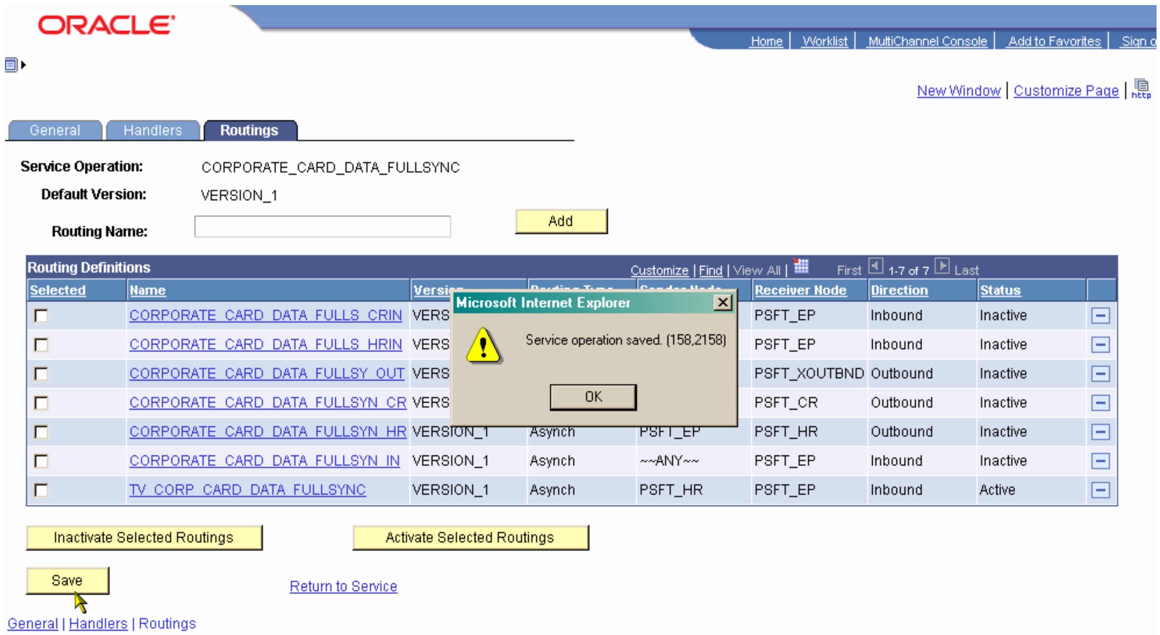
10. Set the Object Owner ID as *Expenses*.

11. Save and then click **Return.**



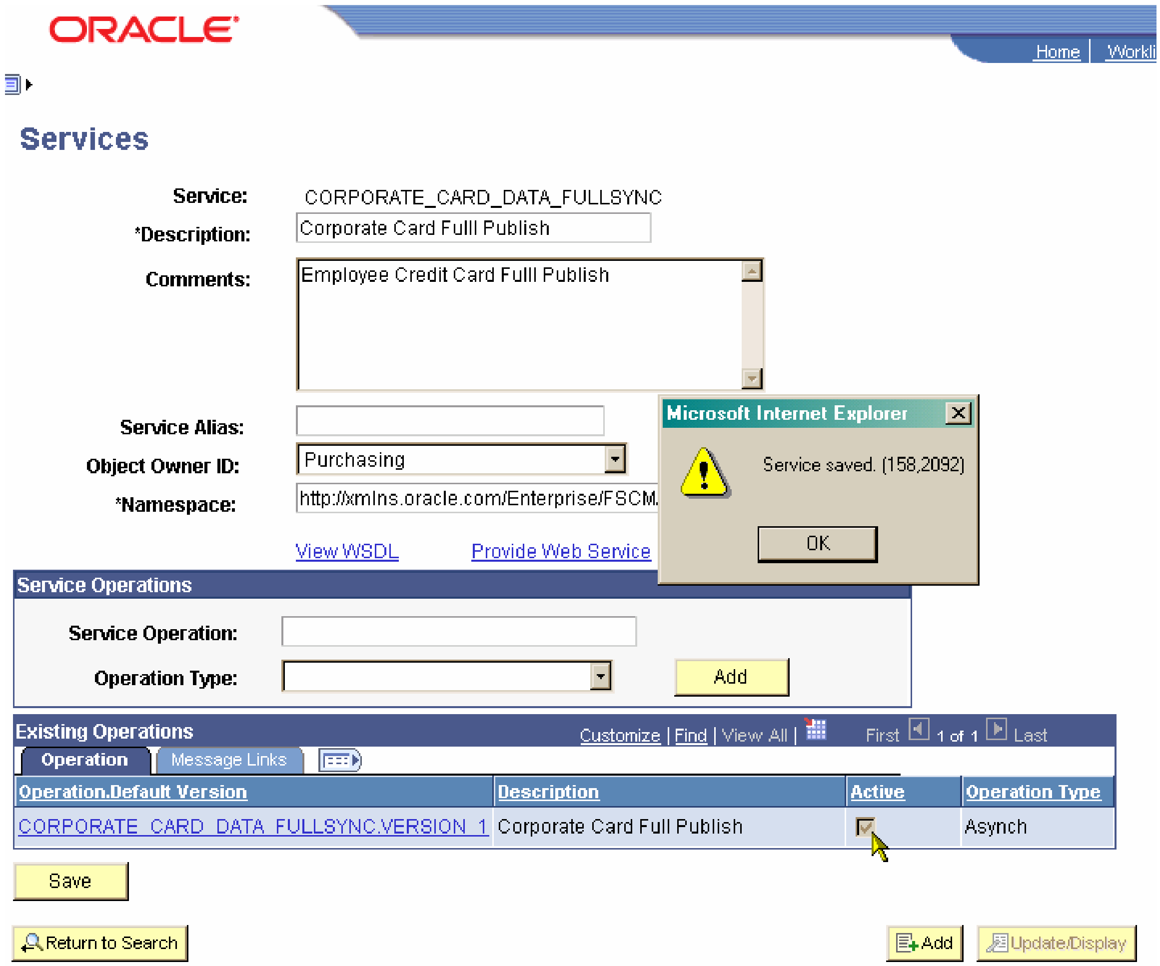
Routing Definitions page

12. Save the Service Operation. Then, click the **Return to Service** link.



Routings tab

13. Notice that the **Active** check box is now turned on. Save the Service and return to Search.

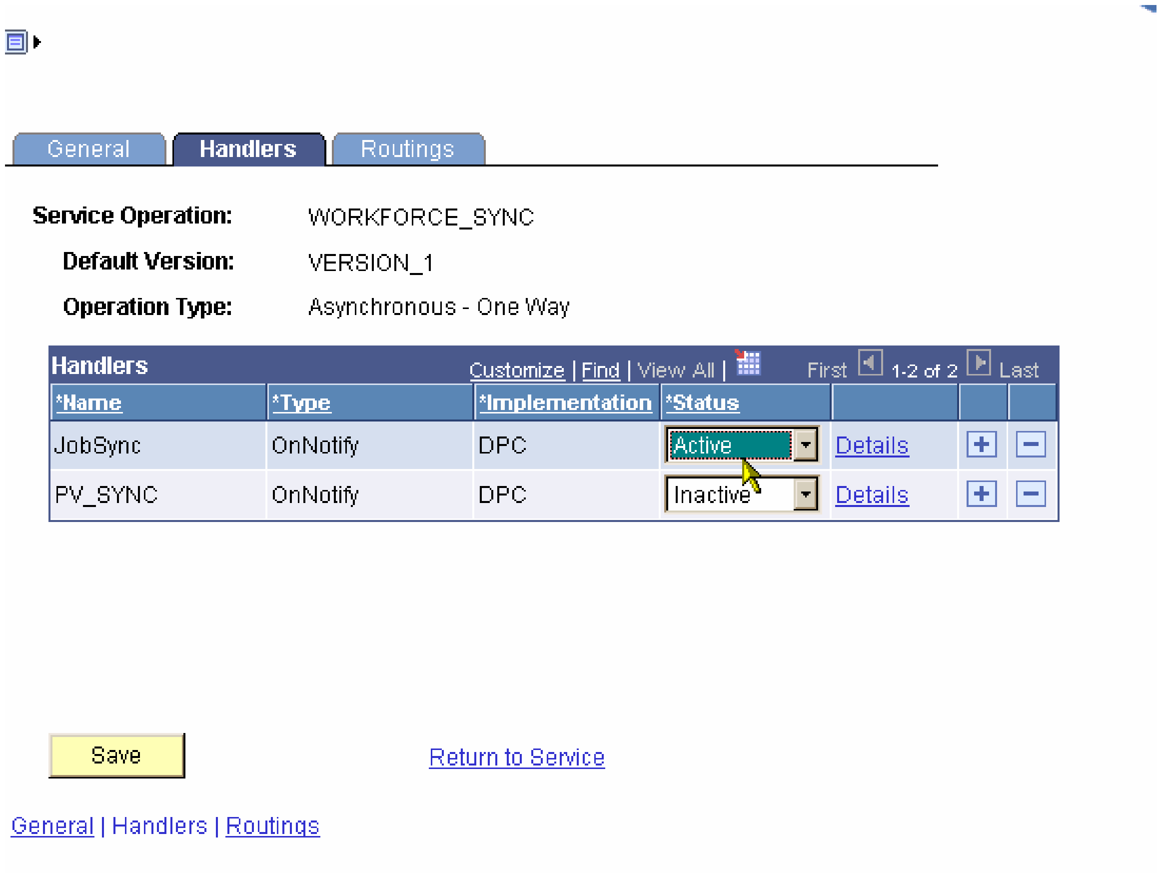


Services page

14. Proceed with the rest of the messages.

Note. The only exception is for WORKFORCE_SYNC. It is only necessary to activate one of the 2 handlers.

15. Activate JobSync handler (Travel does not use the PV_SYNC handler).



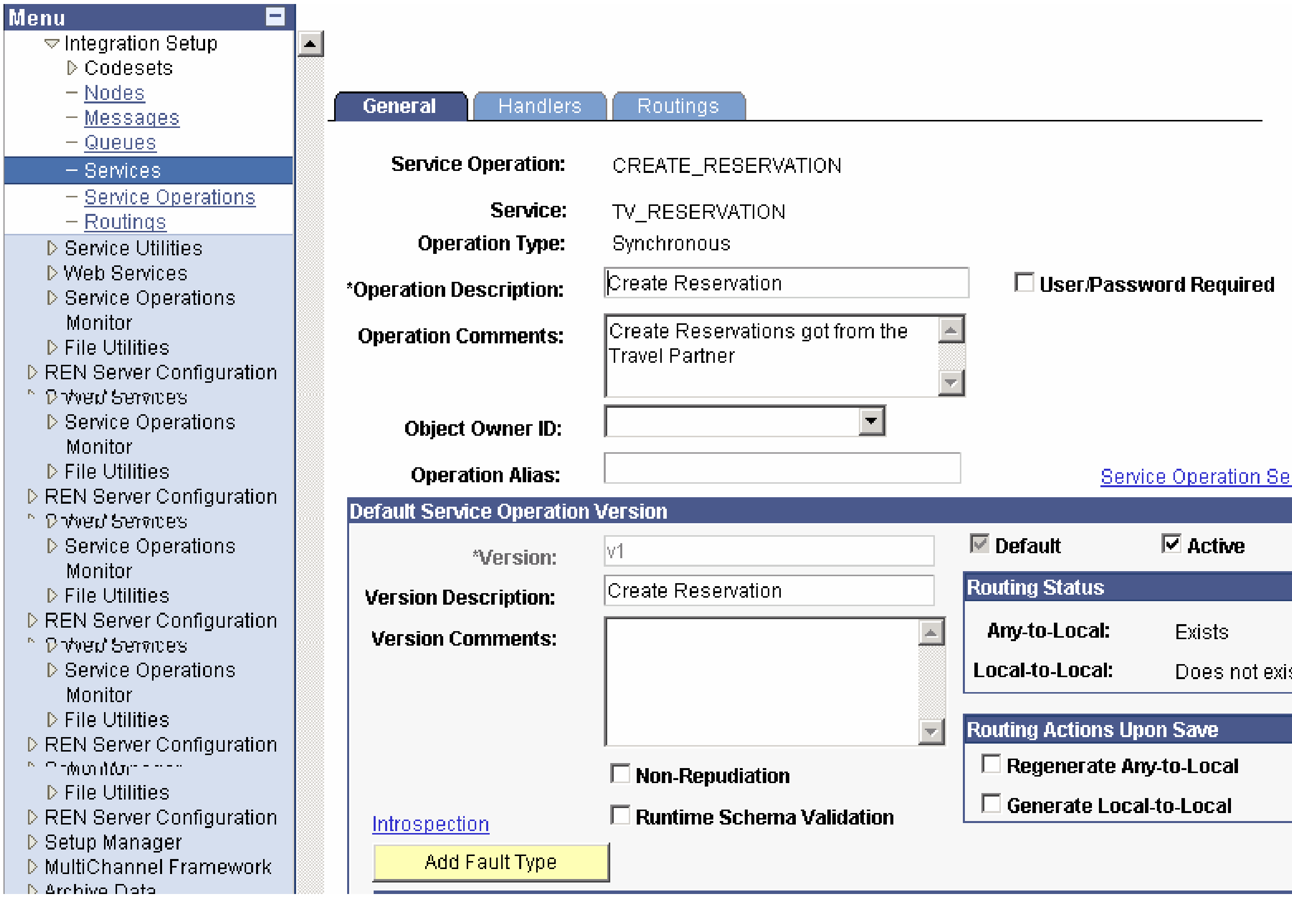
Handlers tab

Task 19-4: Configure Integration Broker for itinerary exchange

To configure the integration broker for itinerary exchange:

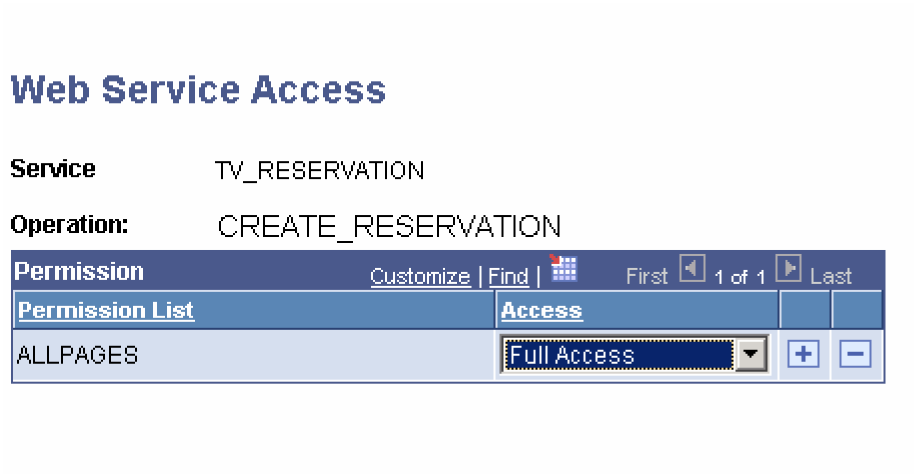
1. Navigate to PeopleTools → Integration Broker → Integration Setup → Services.

2. Confirm the settings on the Handlers tab and Service Operation Security.



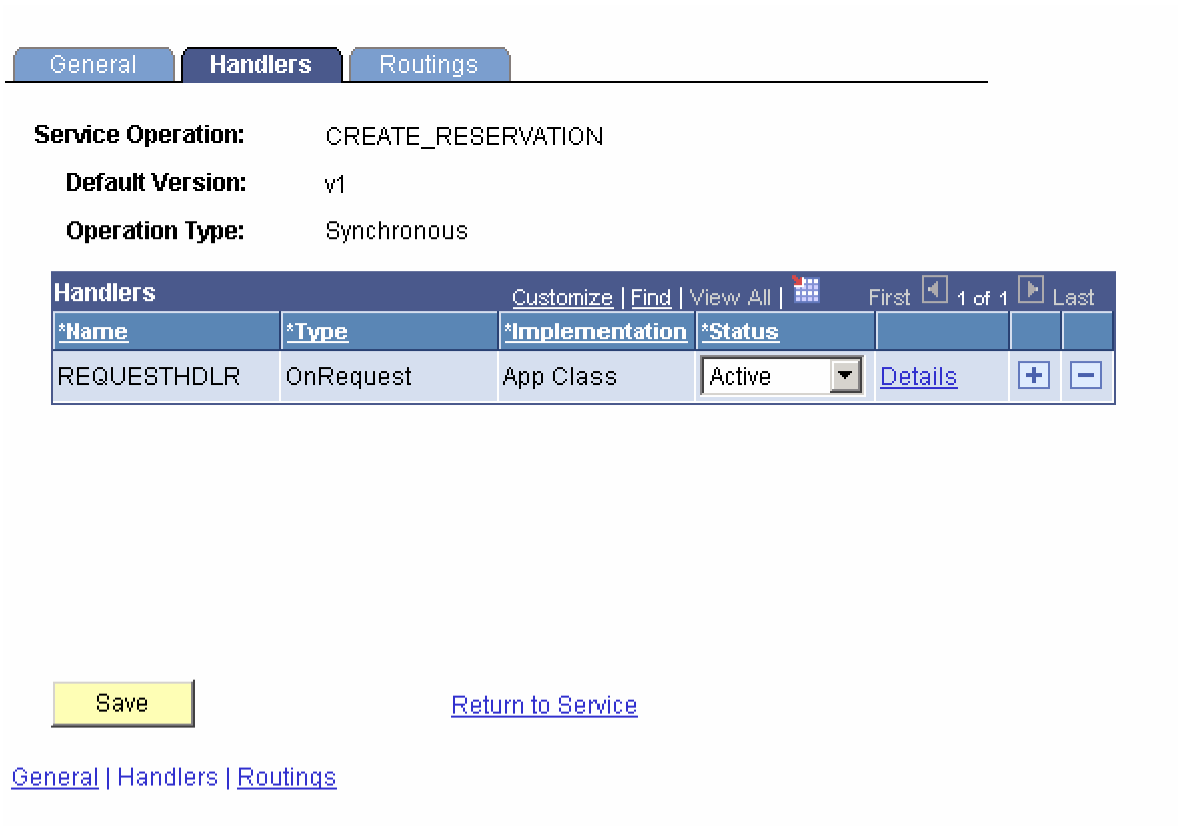
Services – General page

3. Click the Service Operation **Security** link and make sure security is set up correctly for the operation.



Web Service Access page

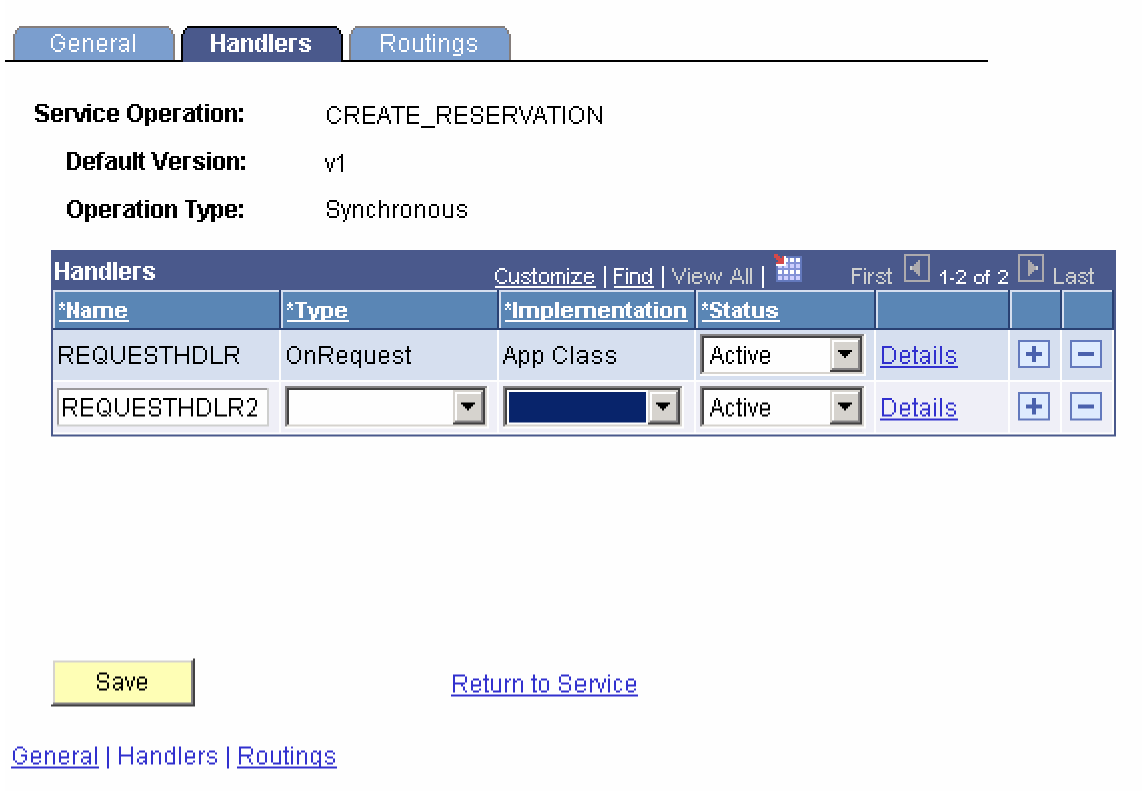
4. Click the Handlers tab. Make sure the **Name, Type, Implementation,** and **Status** fields are setup correctly.



Handlers tab

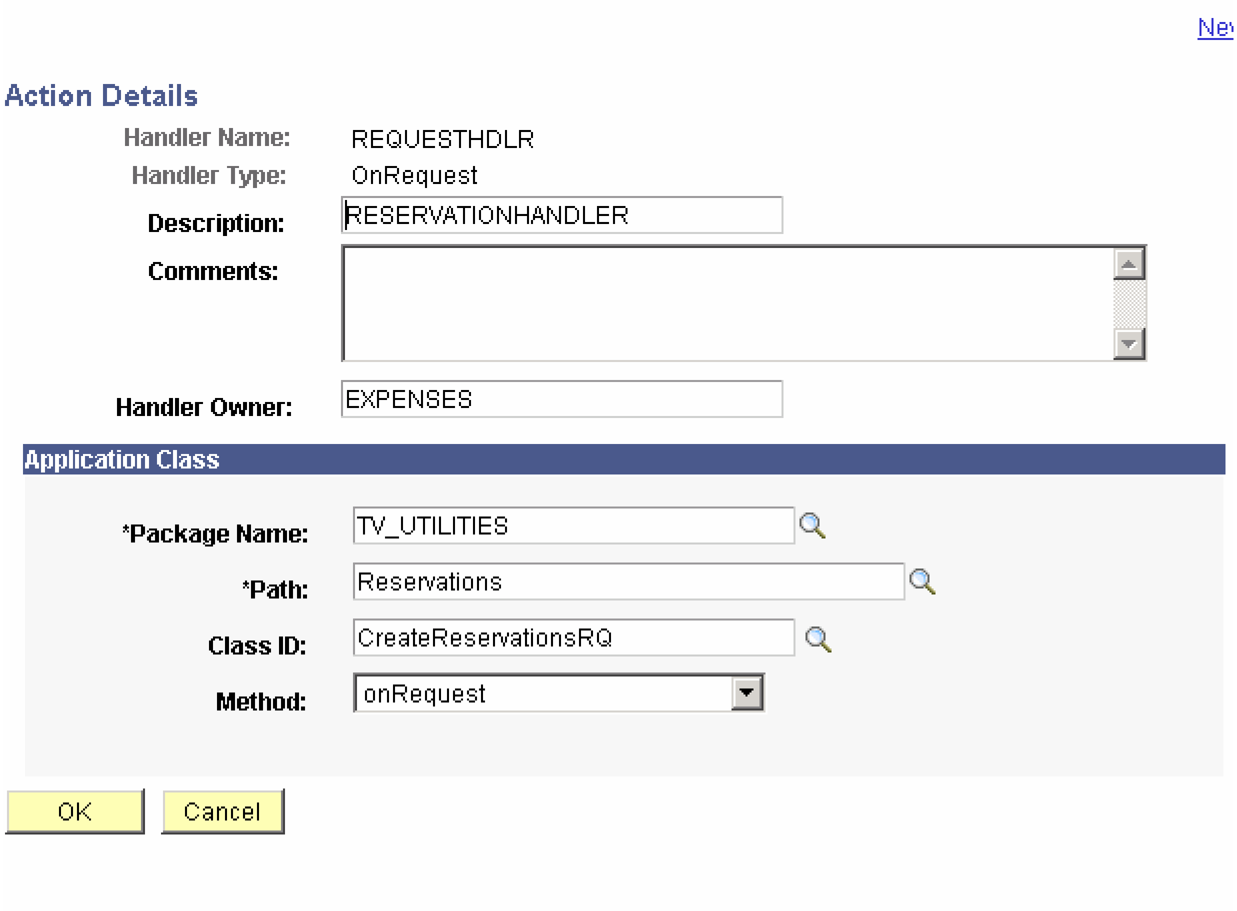
5. Confirm that the **Type** field is set to *OnRequest*, the **Implementation** field is set to *App Class*, and the **Status** field is set to *Active.*

6. Click the **Details** link.



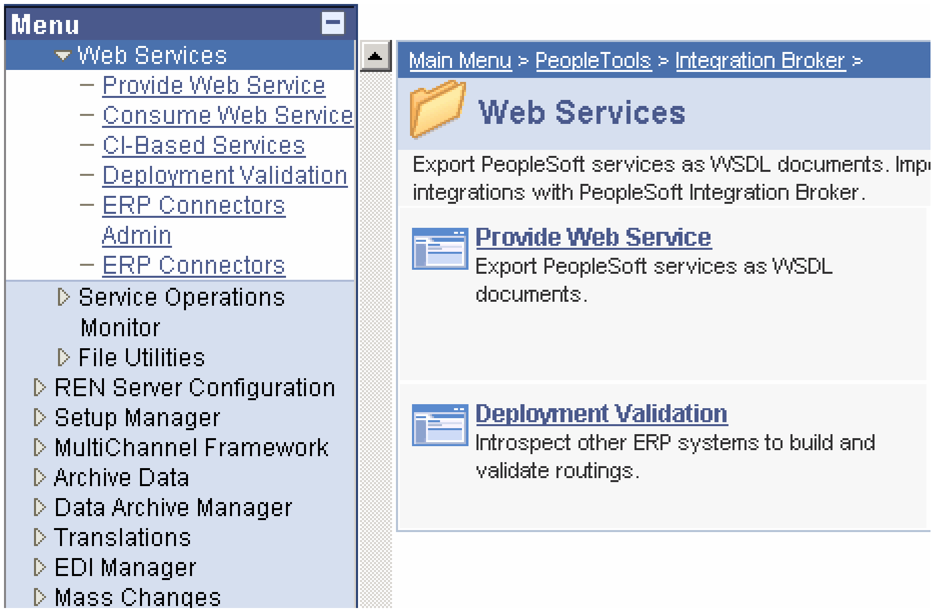
Handlers tab

7. Confirm that the settings on the Action Details page match the figure below.



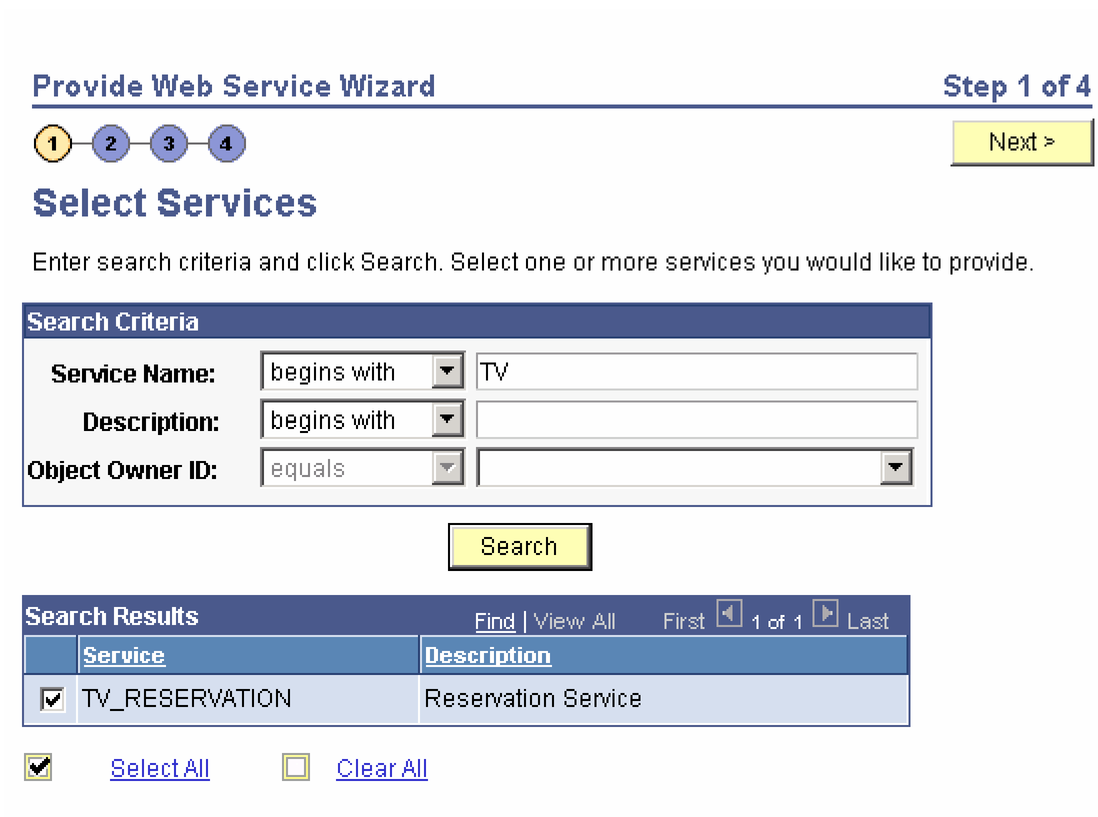
Action Details page

8. Ensure that the web services are also set up correctly. Click the **Provide Web Service** link.



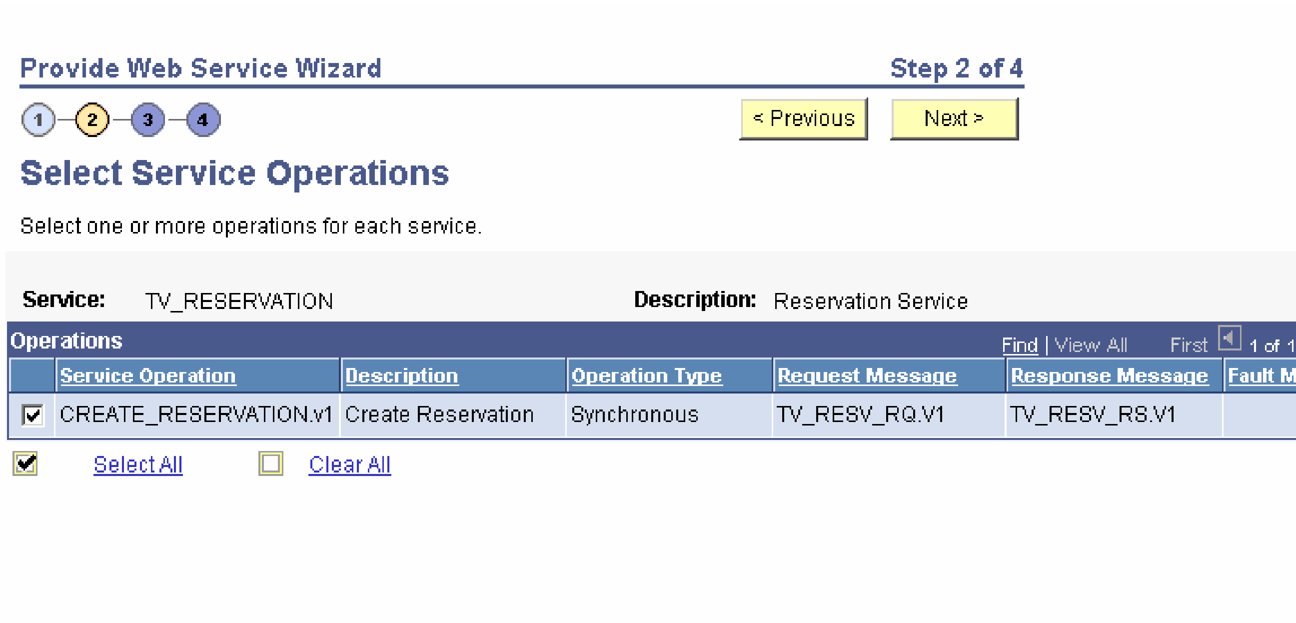
Web Services menu

9. Select the TV_RESERVATION service and then click **Next.**



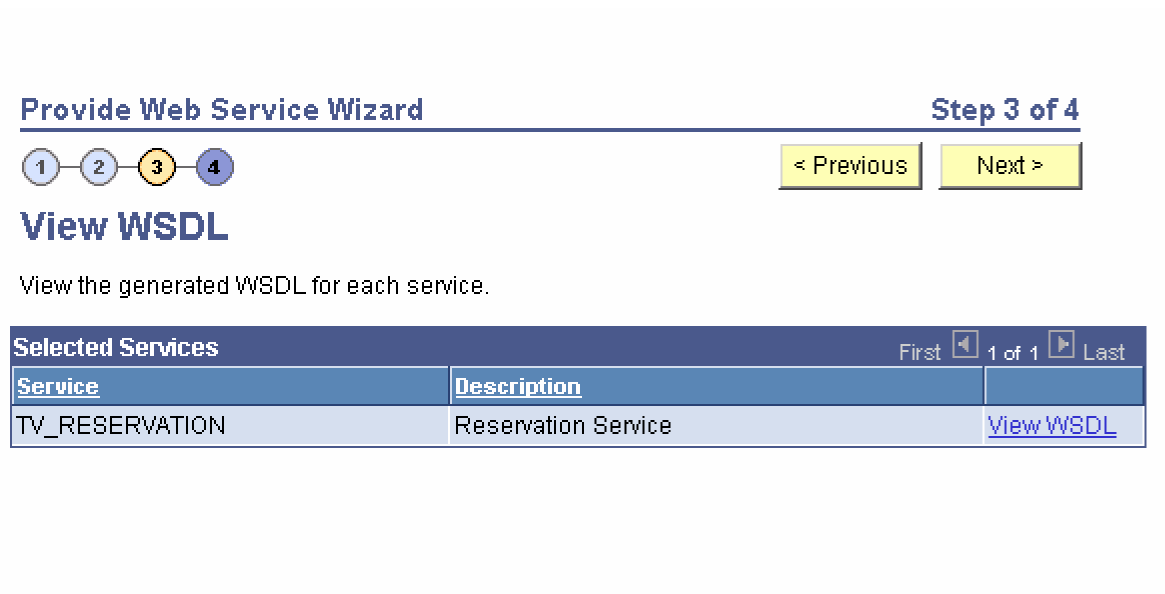
Provide Web Service Wizard – Select Services page

10. Select CREATE_RESERVATION and then click **Next.**



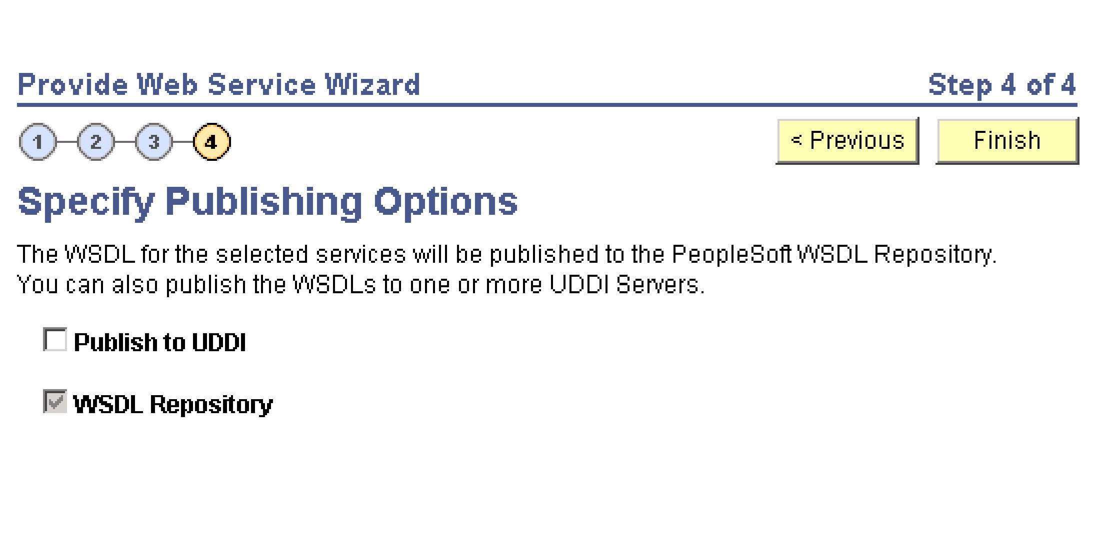
Provide Web Service Wizard – Select Service Operations page

11. Click **Next** on this page.



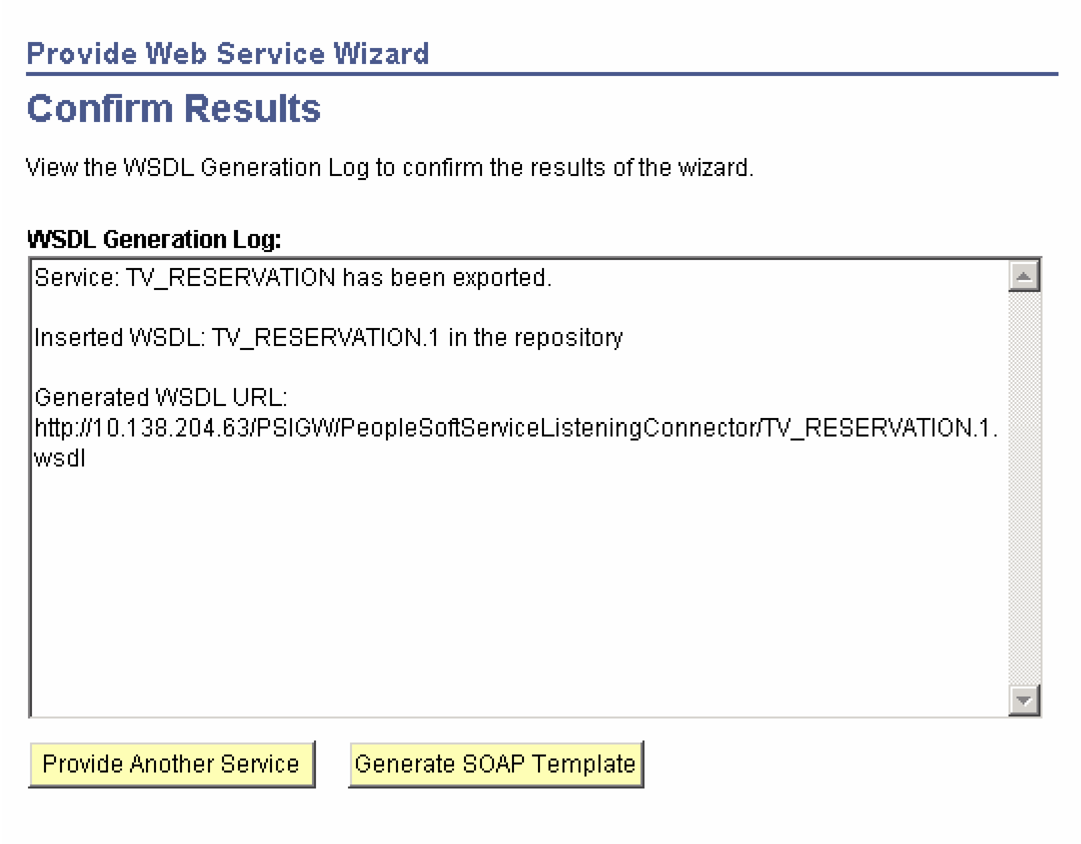
Provide Web Service Wizard – View WSDL page

Note. It is important that you click **Finish** to finish the process.



Provide Web Service Wizard – Specify Publishing Options page

12. If the web service is set up correctly, a confirmation similar to that shown below should appear.



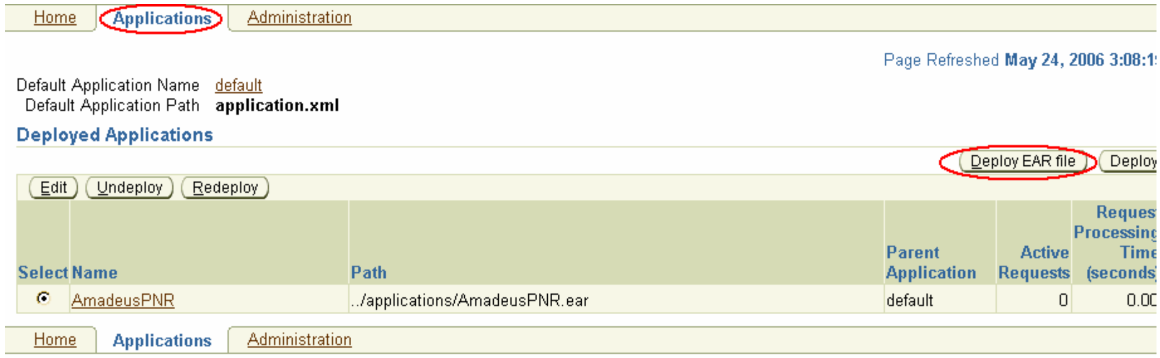
Provide Web Service Wizard – Confirm Results page

Task 19-5: Deploy ReceivePNR web application to enable Aergo reservation exchange (optional)

The ReceivePNR web application is a sample application provided to enable integration with the Aergo on-line travel application. A Enterprise Archive, or EAR file, was created in a directory while running the BPEL deployment process in step 15-1. This web application can be deployed into an Oracle Application Server OC4J instance. The following steps show a typical installation.

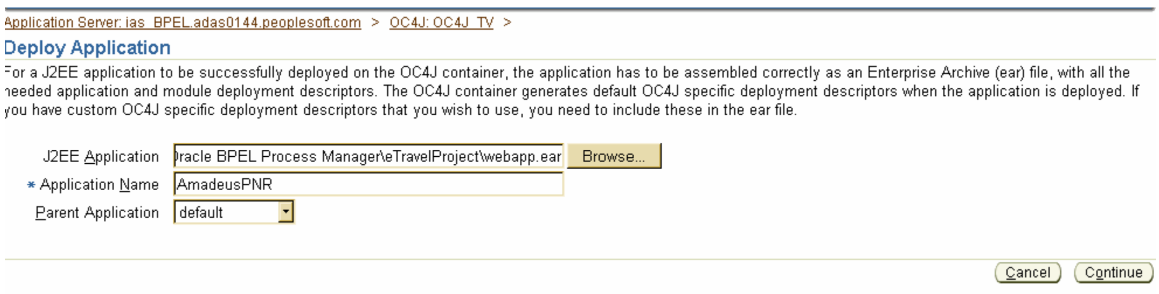
1. Locate the ear file in the file structure created by running the obant process that deployed the BPEL processes.

2. Login into OAS Console and click on the OC4J instance name where the application will be installed. Click the **Applications** tab. Click the **Deploy EAR file** button.



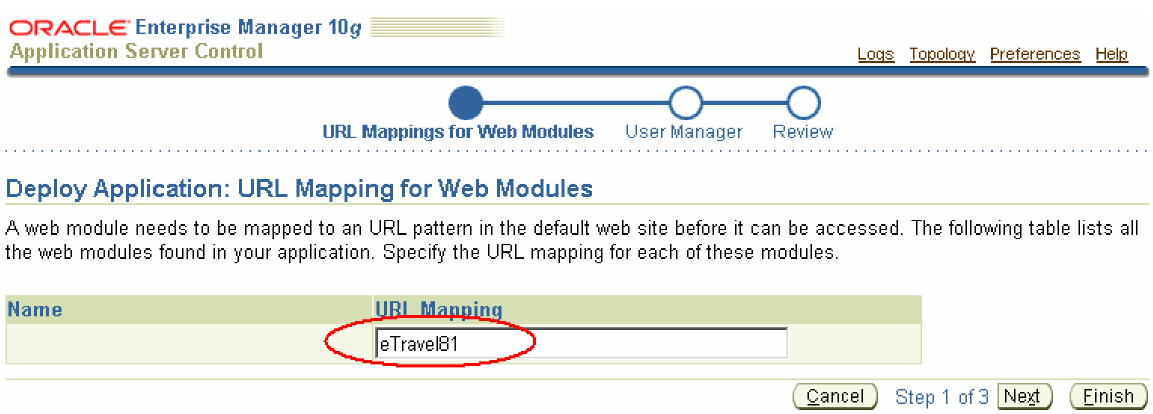
Applications tab

Navigate to the location of the .EAR file. Name the application.



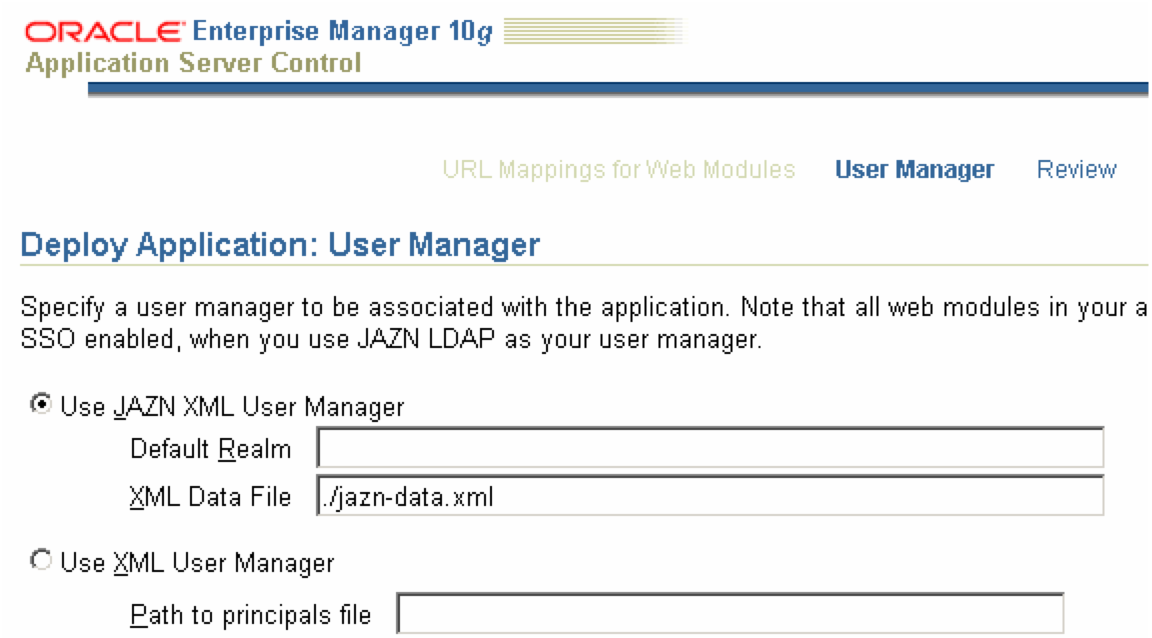
Deploy Application page

Click **Continue.** Enter an appropriate URL Mapping. The URL of this application will be the one to provide to Amadeus for the Aergo itinerary link. Click **Next.**



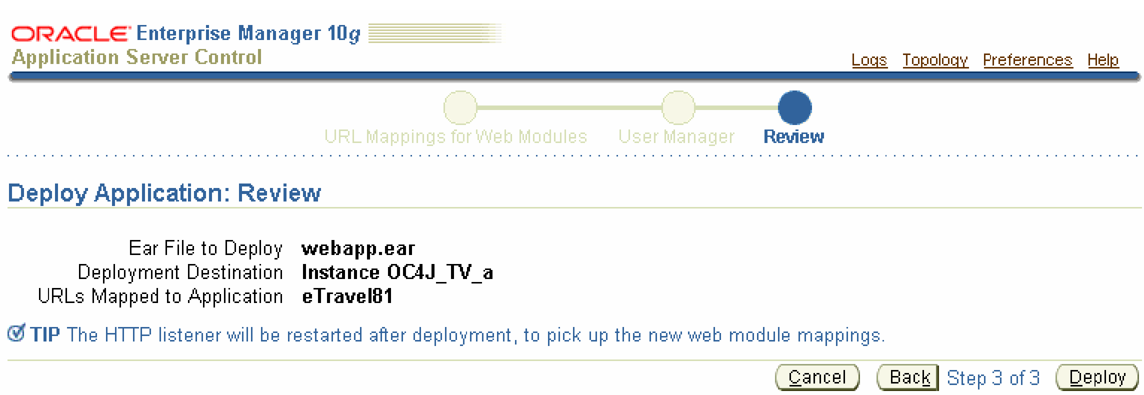
Deploy Application: URL Mapping for Web Modules page

3. Accept the default for the User Manager or specify a User Manager as appropriate. Click **Next.**



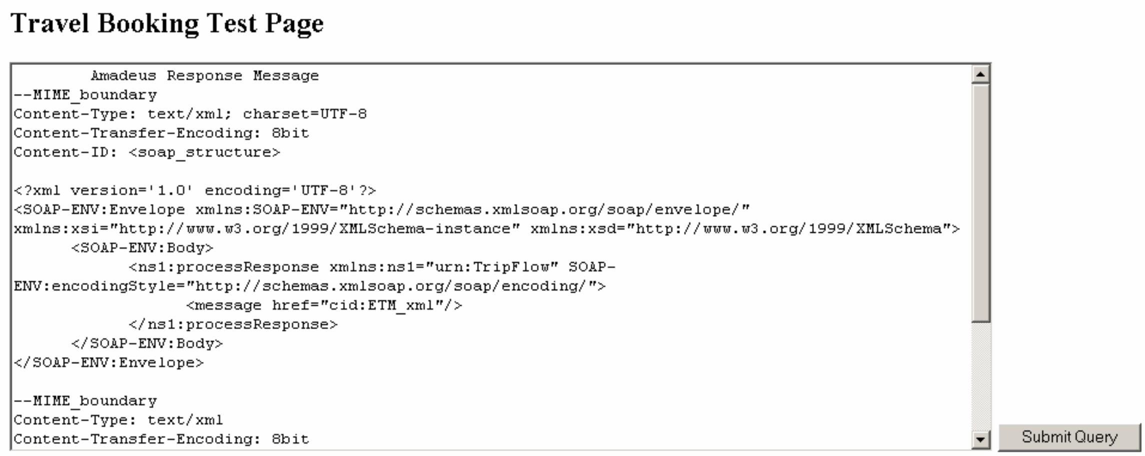
Deploy Application: User Manager page

4. Click **Deploy.**



Deploy Application: Review page

5. Test the application by entering the complete URL into a browser. You should see a page like the one below:



Test page

6. The web application has been successfully deployed.

Task 19-6: Configure Aergo properties

Refer to the Aergo administration documentation or confer with your site administrator to configure profile link and the itinerary exchange. The URL for the itinerary exchange should be the URL of the web application deployed above.

Task 19-7: Verify the Integration

Work with the Travel application provider to devise a test plan appropriate to the features you plan to use.

PART III: INSTALLING SCM APPLICATIONS

CHAPTER 20

INSTALLING PEOPLESOFT ENTERPRISE EPROCUREMENT 9.0

PeopleSoft eProcurement is an application that enables all employees to use web pages to meet their procurement needs. Using electronic catalogs, employees can order the supplies and services they need to do their jobs. Buyers can use PeopleSoft eProcurement to efficiently create and process purchase orders. Suppliers can use PeopleSoft eProcurement to enter invoices.

Note. To install PeopleSoft eProcurement, you must have administrator access rights to the local machine being used for installation.

Task Overview

The following table summarizes the tasks in this document.

Task No.	Task Name
Task 20-1	Installing eProcurement CUP Item Export

Task 20-1: Installing eProcurement CUP Item Export

When you install the Financials/SCM application, the system downloads the CUP Export setup program on your workstation.

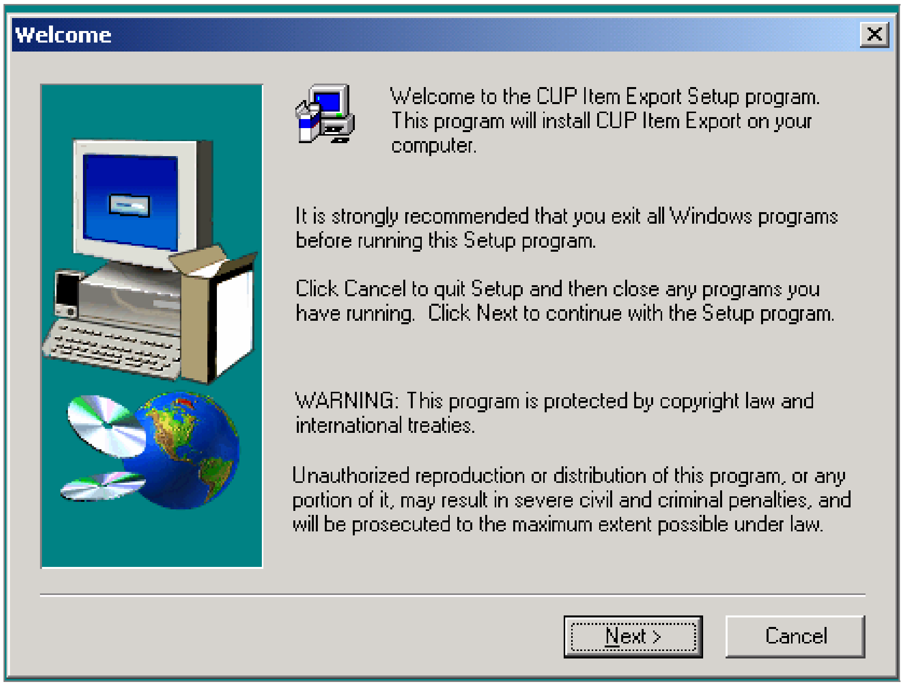
To install PeopleSoft eProcurement CUP Item Export:

The installation of the Financials/SCM application CD-ROM downloads the eProcurement CUP setup to the following directory path on your local drive:

```
C:\<PS_HOME>setup\eProcurement\eng\Setup.exe
```

Note. You can find the Setup.exe in the folder named after your language code. For example, if the language is English, the Setup.exe should reside in the **eng** folder.

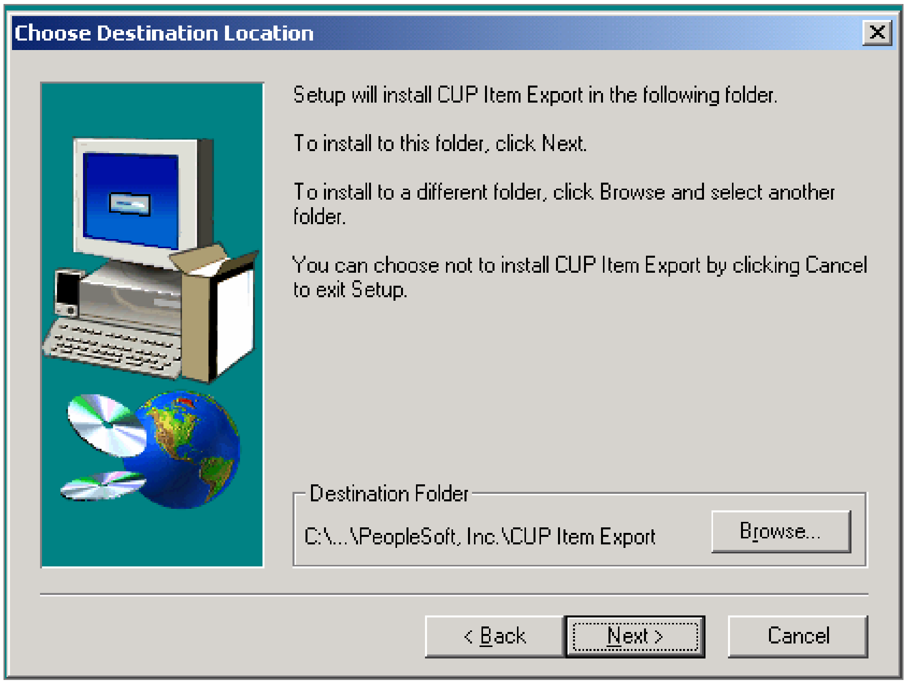
1. Double click **Setup.exe.**



Cup Item Export Welcome window

2. Click **Next** to access the Choose Destination Location window.

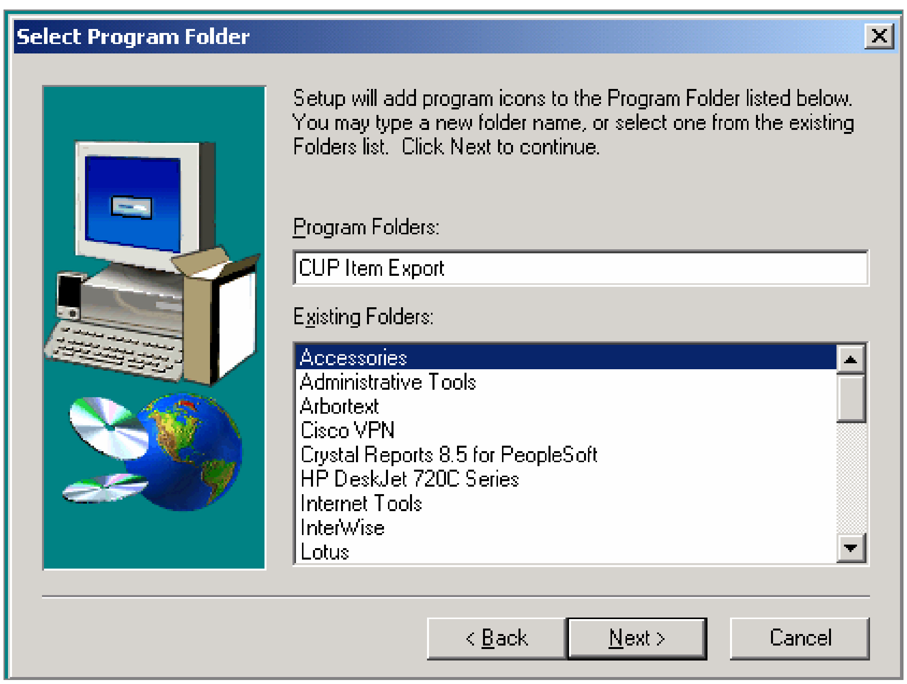
The Choose Destination Location window displays the default destination (C:\Program Files\PeopleSoft, Inc\CUP Item Export) to which the installer will load the CUP Item Export Setup program. To use another installation destination, click **Browse** and enter the new destination path, or navigate to another folder or network drive.



Choose Destination Location window

3. Click **Next** to display the Select Program Folder window.

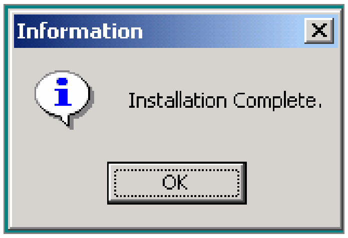
The setup program populates the Program Folder name that defaults to CUP Item Export. Enter a new folder name or select one from the list of existing folders.



Select Program Folder window

4. Click **Next** to start copying files.

After the system has finished copying the files, the following window appears:



Installation Complete window

5. Click **OK.**

The CUP Item Export is now installed locally to your hard drive.

C H A P T E R 2 1

ENTERPRISE QUALITY APPLICATION CLIENT 9.0

The PeopleSoft Quality Application Client is an optional module that provides a Windows workstation with highly interactive statistical analysis and graphics.

PeopleSoft Quality enables you to display, manage, and analyze quality data both on and off the web. The PeopleSoft Quality Application Client also provides a variety of ways to generate interactive charts, graphs, spreadsheets, and statistics.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 21-1	Installing PeopleSoft Quality Application Client
Task 21-2	Installing the PeopleSoft Quality Application Client Locally or to a Network Drive
Task 21-3	Updating Your Registry Entries to Reference a Network Quality Application Client
Task 21-4	Verifying Installation of PeopleSoft Quality

Task 21-1: Installing PeopleSoft Quality Application Client

When installing PeopleSoft Quality Application Client, you have two options:

- You can install the PeopleSoft Quality Application Client to your local hard drive or a network drive. The local or Network Client version of the Quality Application Client is intended for use by quality analysts or power users who need to perform offline analyses or process characterizations. This version is stand-alone as a Windows program.

- You can update your local registry settings to point to the Quality Application Client instance that has already been installed on a network drive in your environment.

The option of installing the PeopleSoft Quality Application Client to your local hard drive or network drive and the option to update your local registry settings will be used in conjunction with each other.

Task 21-2: Installing the PeopleSoft Quality Application Client Locally or to a Network Drive

Use the following procedure to install the PeopleSoft Quality Application Client to a local or network drive.

Before You Begin

- Log in to a user account with administrator privileges.
- Close all other applications that are running on your system.

> **Note.** You can run the installation process as many times as needed on the same machine. We recommend that you uninstall the software prior to reinstalling it again, but it will not cause any problems if you don't perform the uninstall.

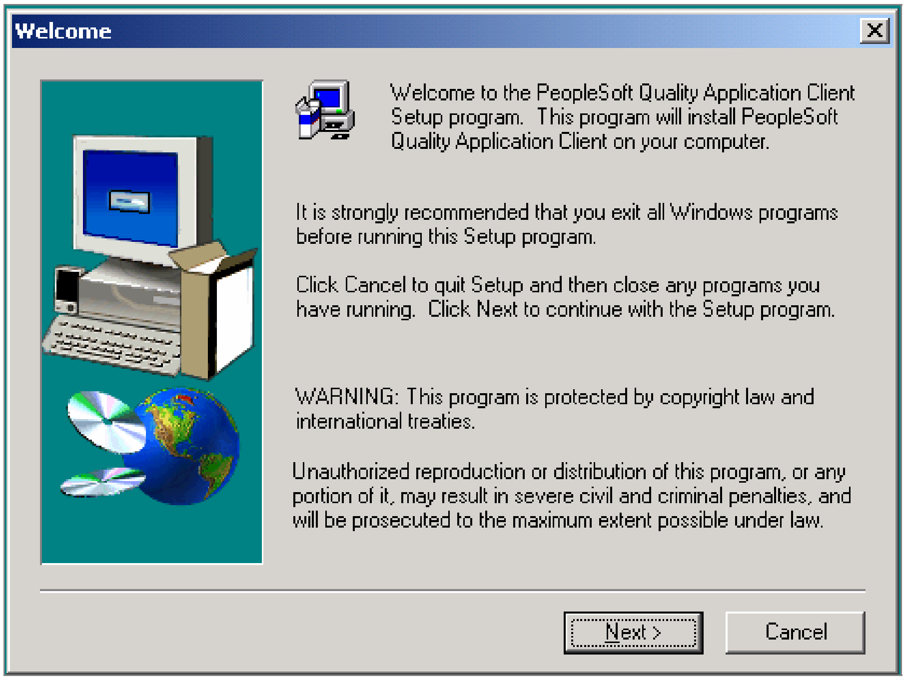
To install the PeopleSoft Quality Application Client locally:

The installation of the Financials/SCM application CD-ROM downloads the Quality setup to the following directory path on your local drive:

```
C:\<PS_HOME>\setup\Quality\eng\Setup.exe
```

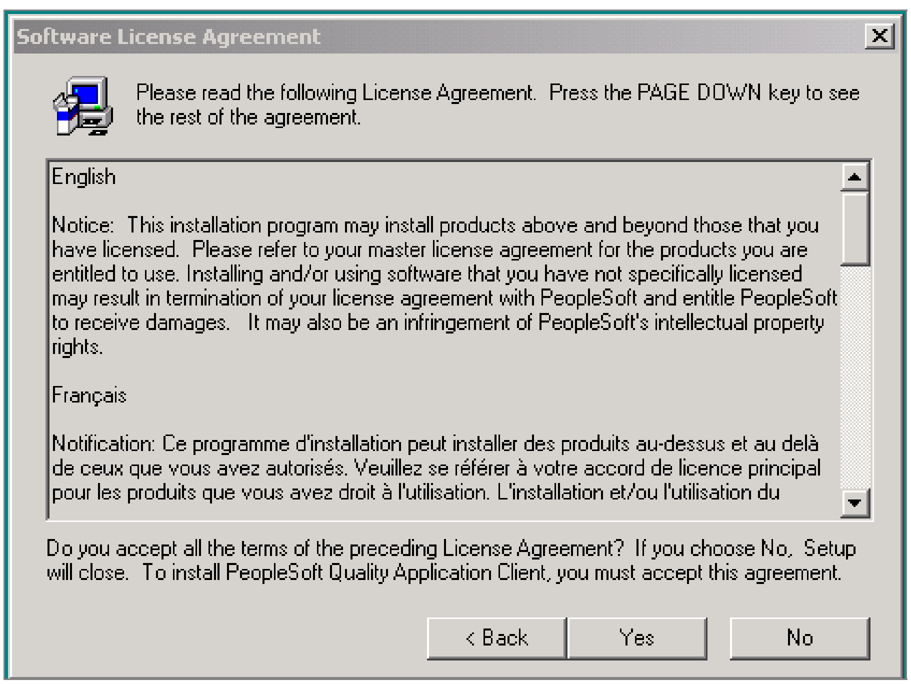
> **Note.** You can find the Setup.exe in the folder named after your language code. For example, if the language is English, the Setup.exe should reside in the eng folder.

1. Double click **setup.exe.**



PeopleSoft Quality Application Client Welcome window

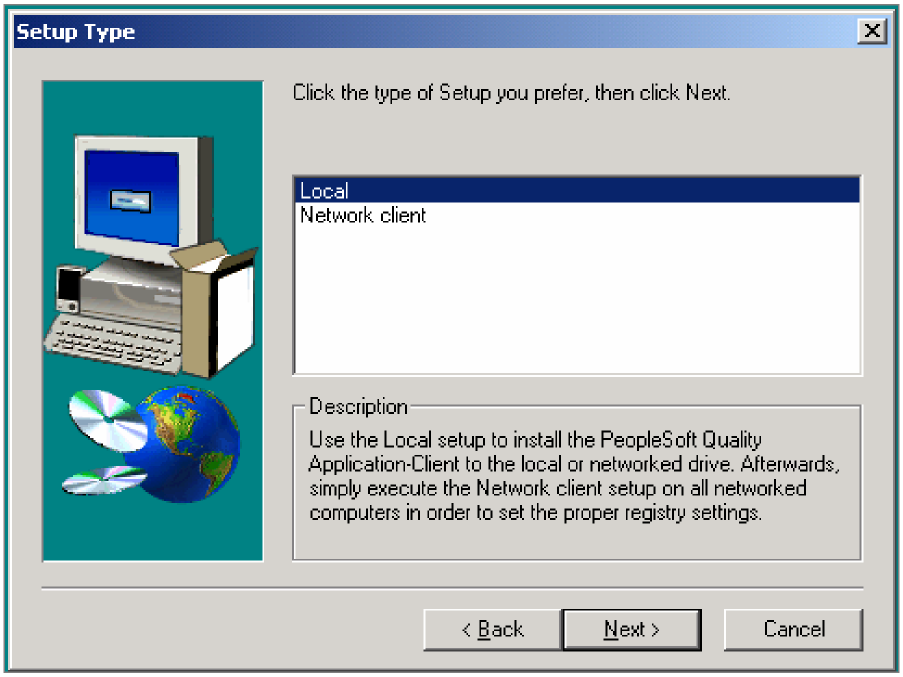
2. Click **Next.**



Software License Agreement window

3. Click **Yes** to accept the Software License Agreement.

Click **No** if you don't want to accept the Software License Agreement. This selection stops the install process.

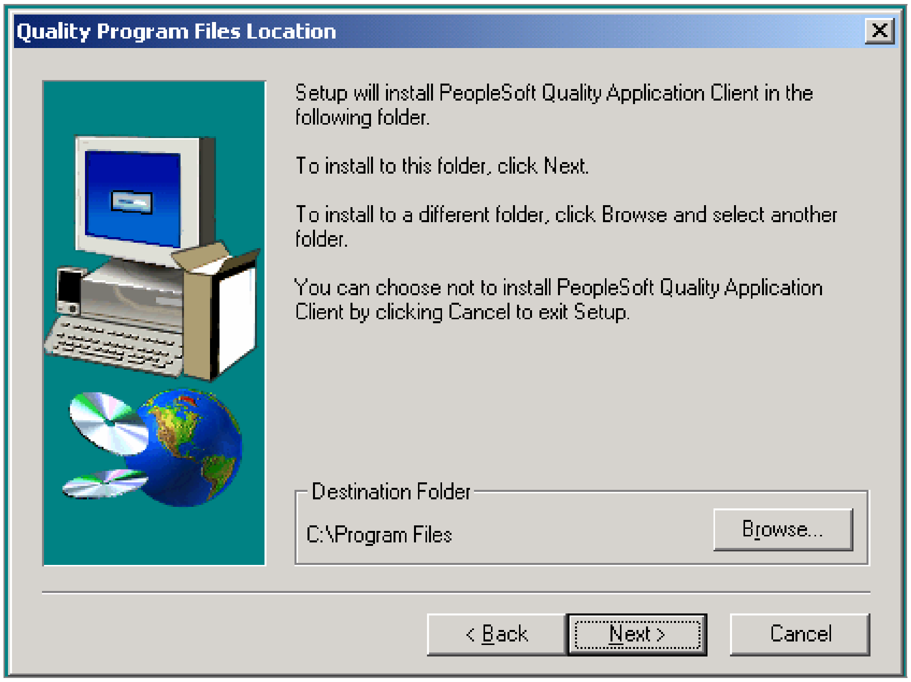


Setup Type window

4. Select the setup type of Local and then click Next.

Setup Types include the following:

- Local: Select to install the PeopleSoft Quality Application Client to your local hard drive or a network drive.
- Network Client: Select to update your local registry settings to point to the PeopleSoft Quality Application Client that has already been installed on a network drive in your environment.

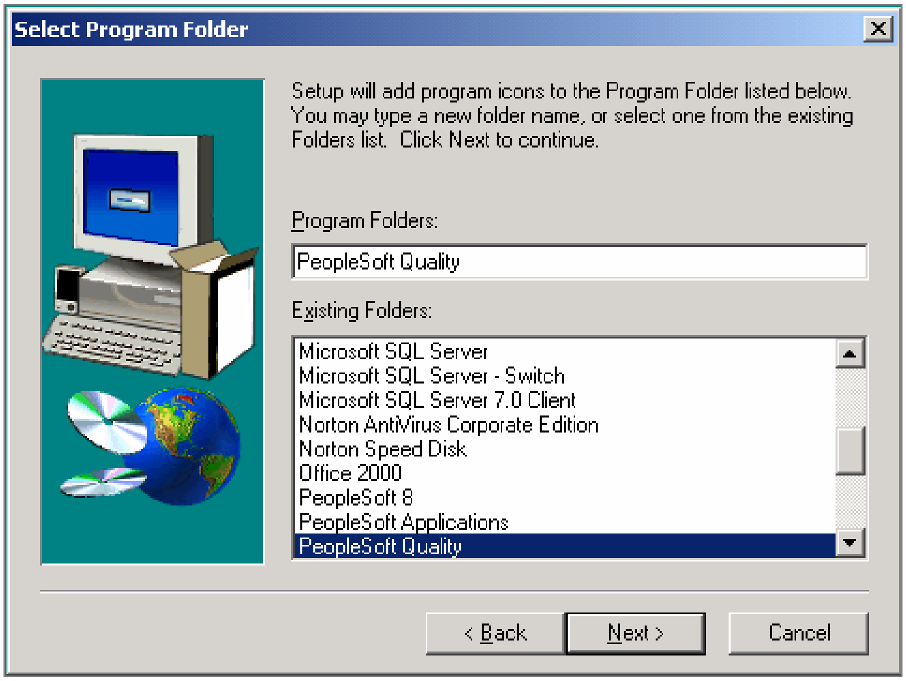


Quality Program Files Location window

5. In the Quality Program Files Location window, enter the Destination Folder and then click **Next.**

The setup program attempts to populate the **Destination Folder** location for you. Click **Browse** to select a different location.

> **Note.** We suggest that you use the system defaults for the Destination Folder. The install script for Setup Type (Network Client) has been designed to automatically look for this particular name (drive:\Program Files\PeopleSoft Applications\Quality) in its processing. If you change the location or name to something else, when you execute the other option, you'll have to remember where you loaded the PeopleSoft Quality files.



Select Program Folder window

6. Verify the program folder location.

The setup program populates the Program Folders name for you. You may enter a different one.

The setup program executes the PeopleSoft Quality Client install process. When the install process completes, the following window appears:

Setup Complete window

7. Click **Finish.**

The PeopleSoft Quality Application Client is now installed locally to your hard drive.

Task 21-3: Updating Your Registry Entries to Reference a Network Quality Application Client

Use the following procedure to update your local registry settings to reference a PeopleSoft Quality Application Client that has already been installed on a network drive. Perform this procedure after installing the PeopleSoft Quality Application Client to a network drive.

Before You Begin

- Log in to a user account with administrator privileges.
- Close all other applications that are running on your system.
- Note the URL path to PeopleSoft Quality HTML help pages on your system.

> **Note.** You can run the installation process as many times as needed on the same machine. We recommend that you uninstall the software prior to reinstalling it again, but it will not cause any problems if you don't perform the uninstall.

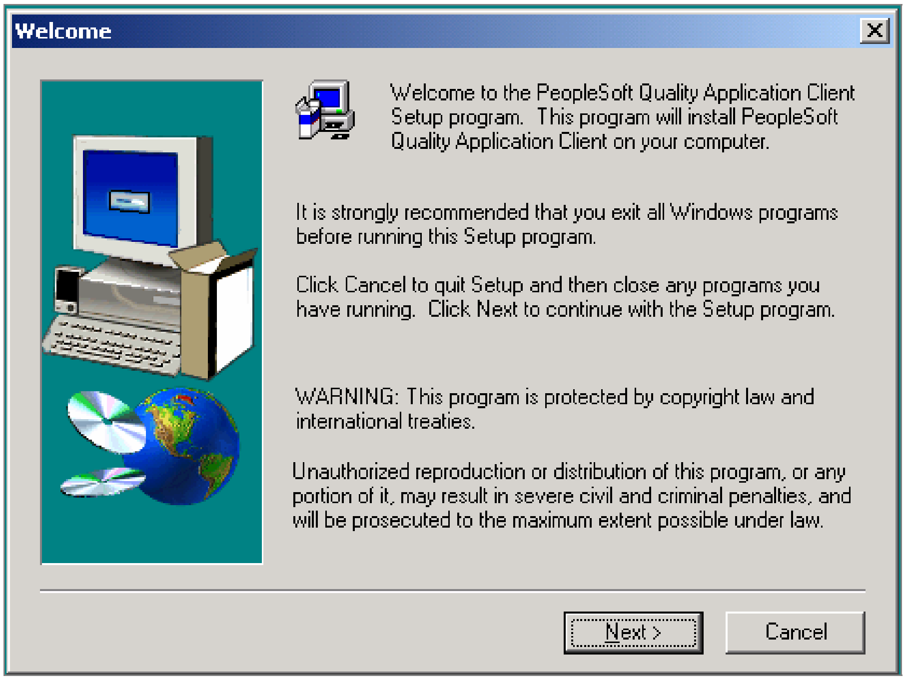
To update your registry entries:

The installation of the Financials/SCM application CD-ROM downloads the Quality setup to the following directory path on your local drive:

```
C:\<PS_HOME>\setup\Quality\eng\Setup.exe
```

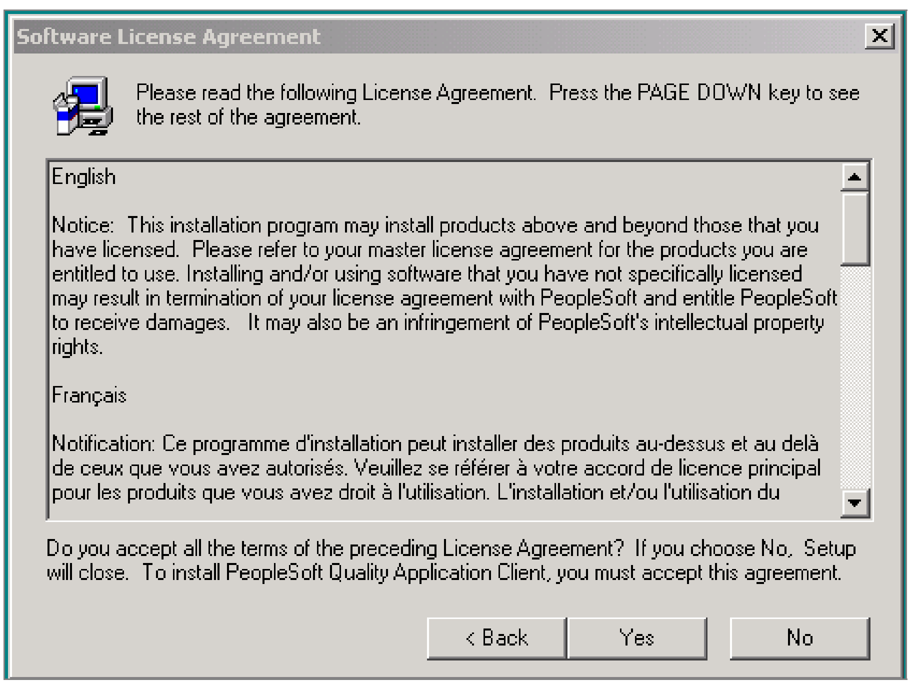
> **Note.** You can find the Setup.exe in the folder named after your language code. For example, if the language is English, the Setup.exe should reside in the eng folder.

1. Double click **setup.exe** that you have downloaded.



PeopleSoft Quality Application Client Welcome window

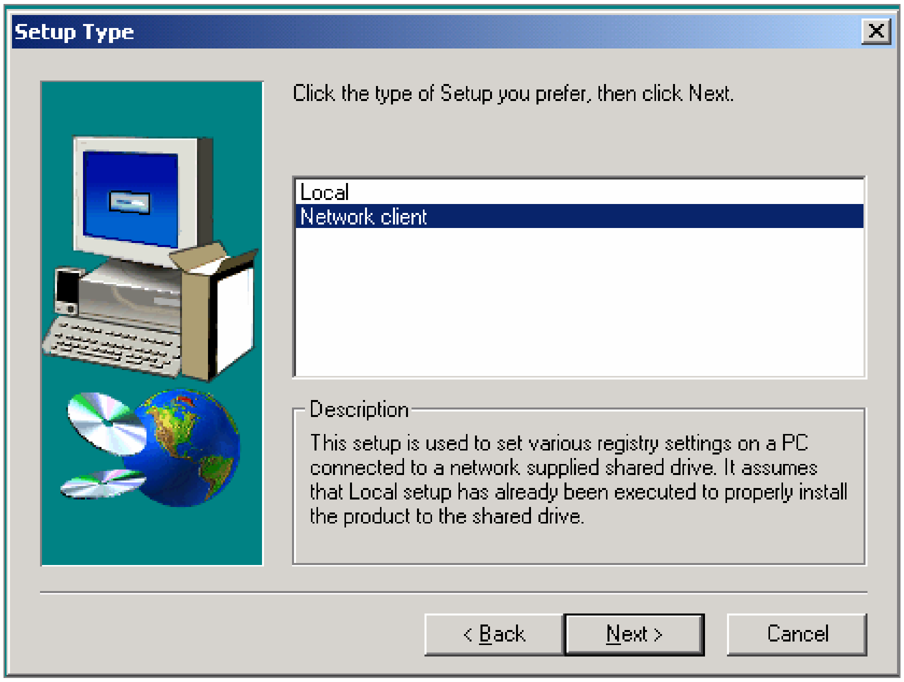
2. Click **Next**.



Software License Agreement window

3. Click **Yes** to accept the Software License Agreement.

Click **No** if you don't want to accept the Software License Agreement. This selection stops the install process.

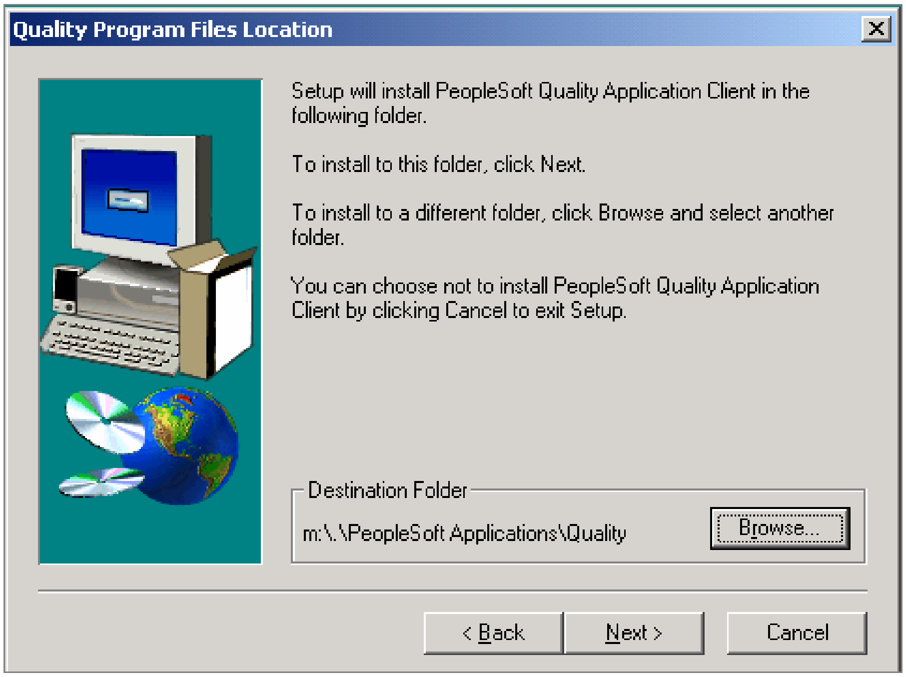


Setup Type window

4. Select the setup type of Network Client and then click **Next.**

Setup Types include the following:

- **Local:** Select to install the PeopleSoft Quality Server to your local hard drive or a network drive.
- **Network Client:** Select to update your local registry settings to point to the PeopleSoft Quality Server that has already been installed on a network drive in your environment.

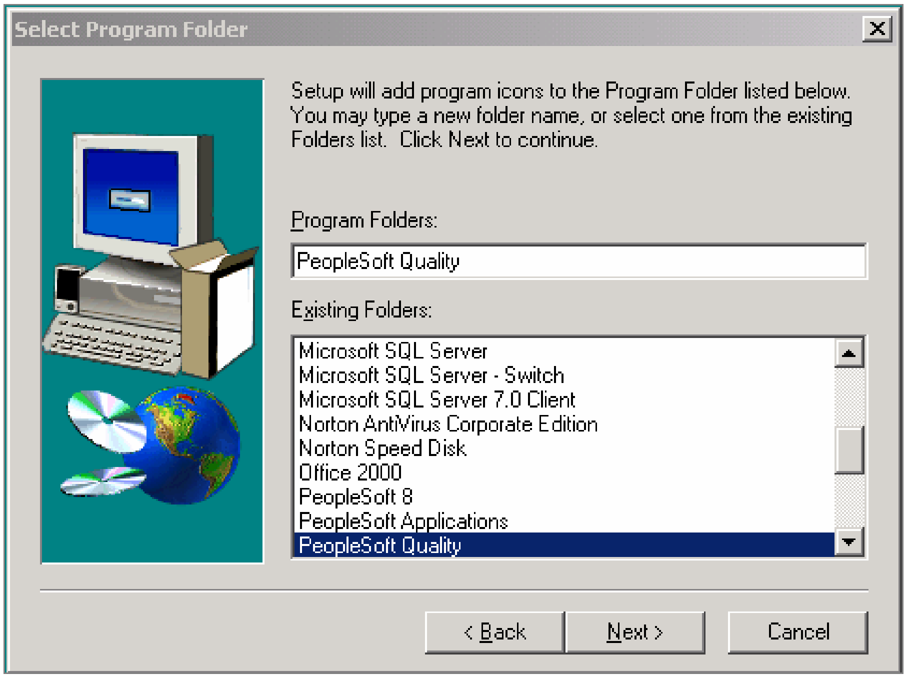


Quality Program Files Location window

5. In the Quality Program Files Location window, enter the Destination Folder and then click **Next.**

   The setup program attempts to populate the **Destination Folder** location for you. Click **Browse** to select a different location.

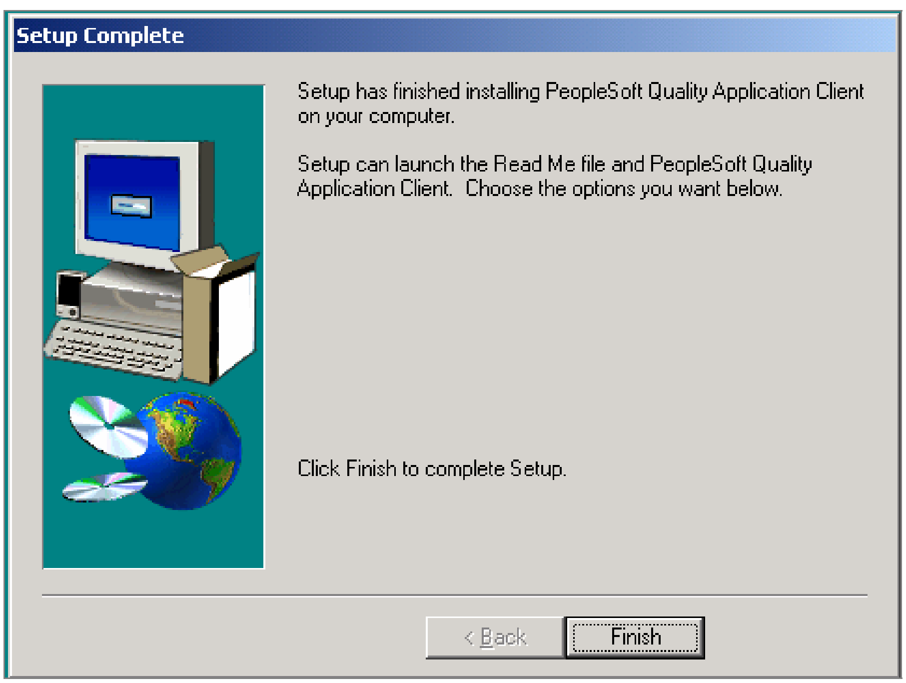
> **Note.** We suggest that you use the system defaults for the **Destination Folder.** The install script for Setup Type (Network Client) has been designed to automatically look for this particular name (drive:\Program Files\PeopleSoft Applications\Quality) in its processing. If you change the location or name to something else, when you execute the other option, you'll have to remember where you loaded the PeopleSoft Quality files.



Select Program Folder window

6. The setup program populates the **Program Folders** name for you. You may enter a new program folder.

The setup program executes the PeopleSoft Quality Application Client install process. When the install process completes, the following window appears:



Setup Complete window

7. Click **Finish.**

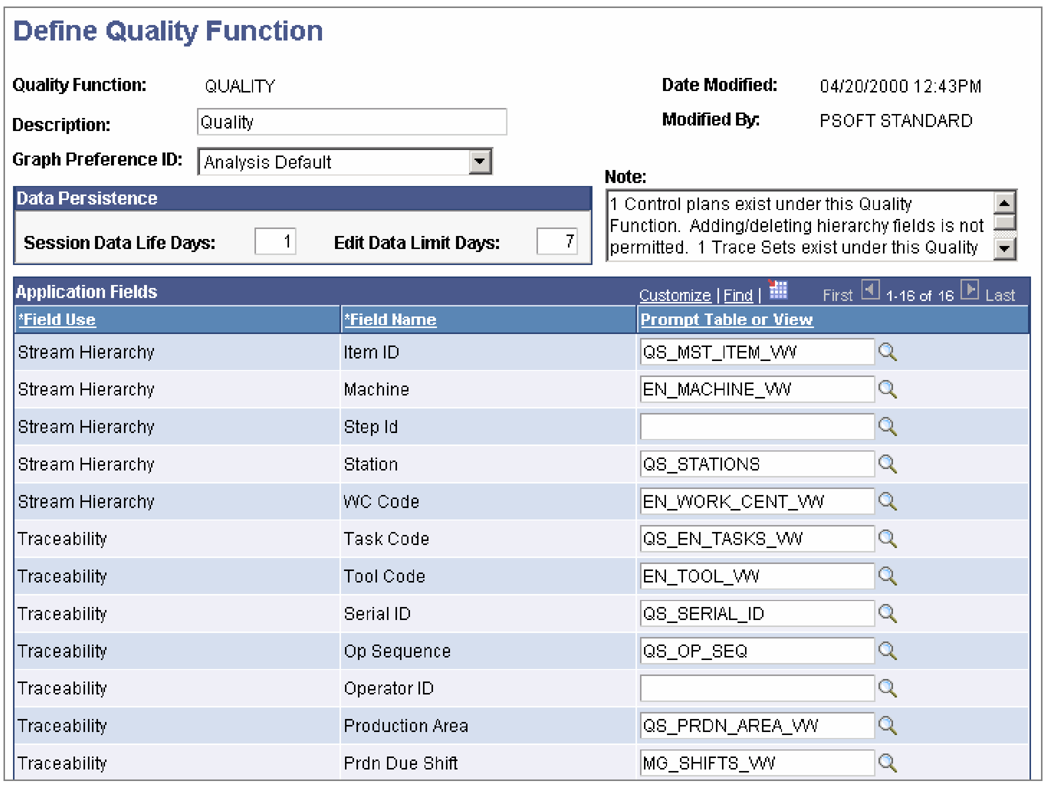
Your registry entries have now been updated and are referencing a PeopleSoft Quality Application Client on a network drive.

Task 21-4: Verifying Installation of PeopleSoft Quality

To verify the Quality installation:

1. From the browser, log on to PIA. Then, go to the following menu item: Quality, Define Methods and Procedures, Quality Functions.

2. Search for the standard quality function *QUALITY.* The following page should display:



Verify that PeopleSoft Quality database objects have been installed and are accessible

C H A P T E R 2 2

CONFIGURING EMAIL URLS IN SCM APPLICATIONS

Some products in Supply Chain Management can send out email notifications containing web addresses (URLs) that enable your employees to link back to your website. In order for emails to contain the correct embedded URLs to PeopleSoft Inventory, Purchasing, and eProcurement pages, you will need to edit the URL discussed in this section.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 22-1	Configuring eMail URLs for Item Loader Exceptions
Task 22-2	Configuring eMail URLs for Supplier Facing Applications Used Within PeopleSoft eSupplier Connection, Collaborative Supply Management, Strategic Sourcing, and Services Procurement
Task 22-3	Configuring eMail URLs for eBill Payment

Task 22-1: Configuring eMail URLs for Item Loader Exceptions

You modify SCM_SERVLET_INT to point to an internal server used to access the Supply Chain Management database. This URL is used to create standard PeopleSoft Internet Architecture links for internal users such as employees to access pertinent components and pages.

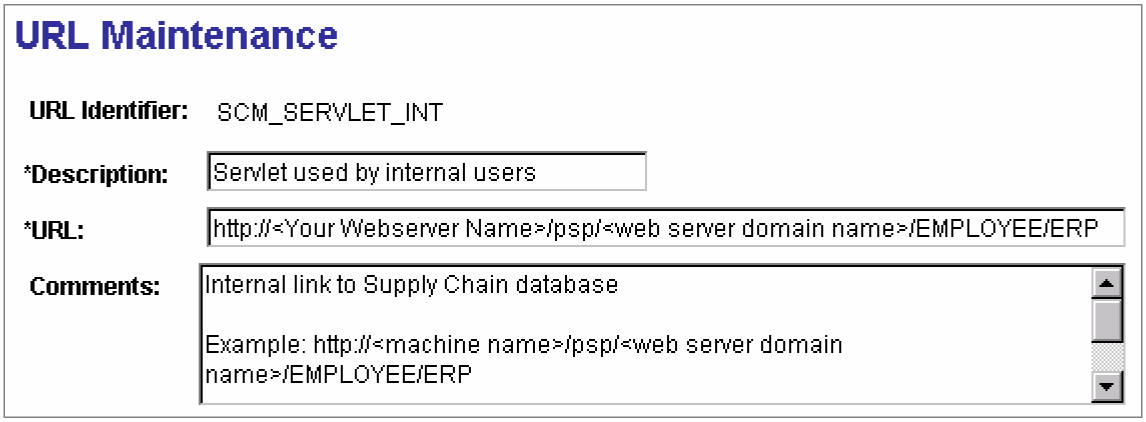
To set up the URL:

1. Go to the PeopleTools URL Maintenance page (PeopleTools, Utilities, Administration, URLs).

2. Select the *SCM_SERVLET_INT* URL.

3. Modify the URL to point to an internal server to access the supply chain database.

4. Click **Save.**



URL Maintenance Page

Task 22-2: Configuring eMail URLs for Supplier Facing Applications Used Within PeopleSoft eSupplier Connection, Collaborative Supply Management, Strategic Sourcing, and Services Procurement

You need to modify the EMP_SERVLET and SUP_SERVLET to point to the correct servers used to access the Supply Chain Management database. These are needed when not using an Enterprise Portal as there is no other way to identify the different webservers used for the Employee or Supplier side.

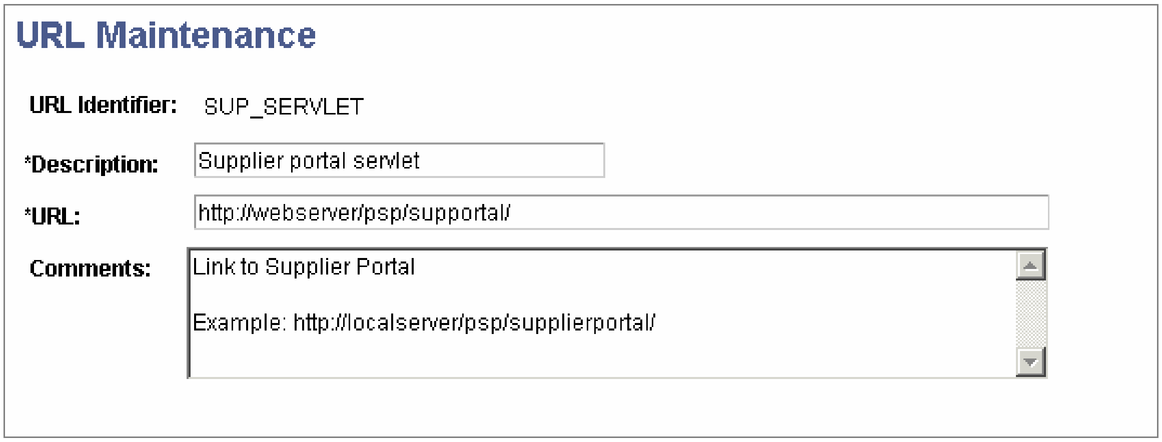
To set up these URLs:

1. Go to the PeopleTools URL Maintenance page (PeopleTools, Utilities, Administration, URLs).

2. Select the *SUP_SERVLET.*

3. Modify the URL to point to an EXTERNAL server to access the supply chain database. (The server that the suppliers use to log onto the SUPPLIER registry).

4. Click **Save.**

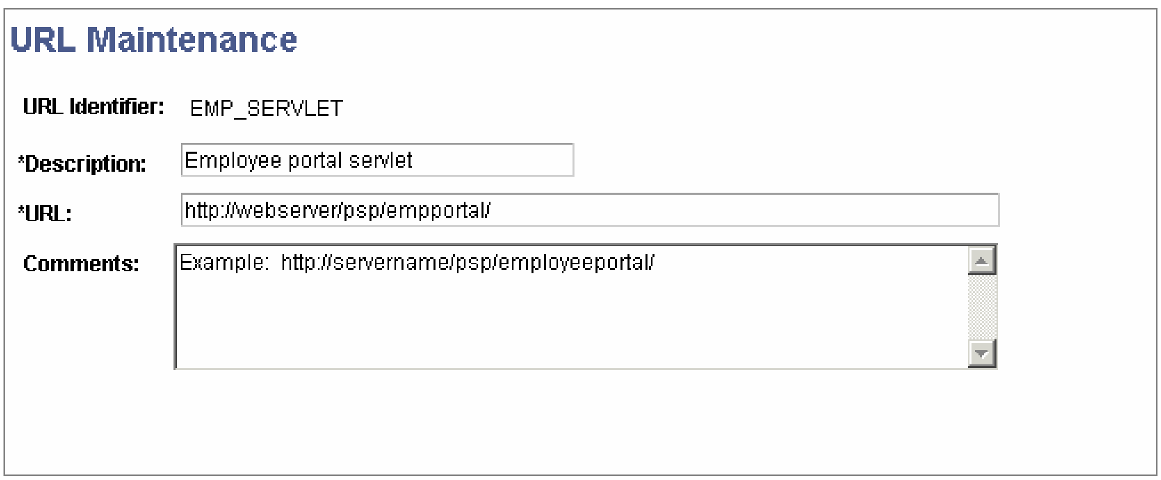


PeopleTools URL Management page

5. Select the *EMP_SERVLET*.

6. Modify the URL to point to an INTERNAL server to access the supply chain database. (The server that the employees use to log onto the EMPLOYEE registry).

7. Click **Save.**



PeopleTools URL Maintenance page

Task 22-3: Configuring eMail URLs for eBill Payment

You need to modify the EB_SERVLET to point to the correct server used to access the Supply Chain Management database for the CUSTOMER registry. This is needed so that PeopleSoft Billing can generate the correct link to the eBill Payment components.

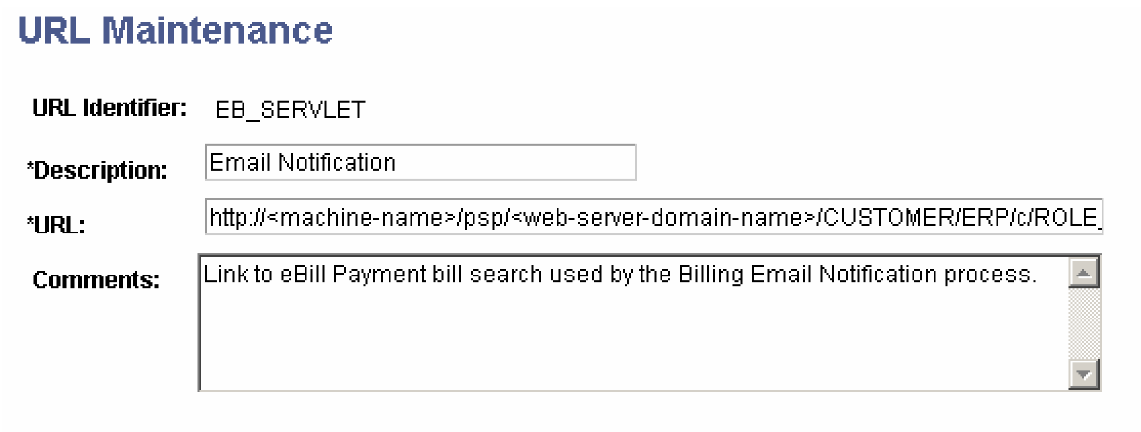
To set up the URL:

1. Go to the PeopleTools URL Maintenance page (PeopleTools, Utilities, Administration, URLs).

2. Select the *EB_SERVLET*.

3. Modify the URL to point to an EXTERNAL server to access the supply chain database. (The server that your customers use to log onto the CUSTOMER registry).

4. Click **Save.**



URL Maintenance Page

C H A P T E R 2 3

Setting Up PeopleSoft Enterprise Supplier Contract Management 9.0

Note. Only perform this task if you use Supplier Contract Management. For complete installation of Supplier Contracts, refer to the Supplier Contract Management PeopleBook, Chapter 1, Setting Up PeopleSoft Supplier Contract Management.

In order to use Supplier Contract Management you must at a minimum setup a file server based FTP server (see section *Setting Up Supplier Contract Attachment FTP Servers and Directories*) and have Microsoft Word 2003 Professional installed on at least one client.

Further setup is detailed in the PeopleBooks for the following:

- Setup of a Microsoft Word template (see section *Defining Document Templates and Styles*)

- Optional setup for individual clients to allow certain users to lookup clauses and bind variables in the PeopleSoft database from within Word 2003 using Microsoft Research task pane functionality (See section *Setting Up Microsoft Word Components on Workstation*).

- Optional setup to allow users to do server side compares of Word documents, and optional dispatch of contracts to suppliers in a .doc format (versus the default .xml format). (See section *Defining Installation Options for Supplier Contract Management*).

- Optional installation setup for Verity (See section *Defining Installation Options for Supplier Contract Management*).

- Optional installation setup for workflow (See section *Defining Installation Options for Supplier Contract Management*).

- Optional installation setup for workflow (See section *Defining Installation Options for Supplier Contract Management*). Optional XML import Word Schema Setup for individual clients to allow certain users to import clauses from existing Word documents (see section *Setting Up PeopleSoft Supplier Contract Management*).

- Optional installation setup for Syndication.

C H A P T E R 2 4

SETTING UP SCM PAGELETS

You can access pagelets within the PeopleSoft 9.0 Supply Chain Management application databases.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 24-1	Accessing Pagelets
Task 24-2	Enabling Pagelet Creation and Access with Portal Utilities

Task 24-1: Accessing Pagelets

Scripts must be applied to your database in order to allow access to the pagelet configuration homepage.

Note. The following must be completed for both the **System** and **Demo** databases *unless* otherwise indicated.

To add, remove, or change the layout of the homepage, the homepage personalization security access must be granted to all non-guest users. To update the homepage personalization permission list, use Data Mover to run the **PORTAL_HP_PERS.DMS** script. To add the Portal User role to the user IDs, use Data Mover to run the **PORTAL_ADD_ROLE.DMS** script. Both scripts are located in <PS_HOME>\scripts.

Note. The PAPP_USER role should be granted to all new User IDs for access to the Homepage personalization. After running this script, the role PAPP_USER should be manually removed from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 24-2: Enabling Pagelet Creation and Access with Portal Utilities

Use Data Mover to run the **EOPP_PORTAL_PACK.DMS** script located in <PS_HOME>\scripts. This script enables creating and viewing pagelets using the Enterprise Components Portal Utilities.

Note.	Only perform this task if you are licensed for the PeopleSoft Supply Chain Portal Pack or Enterprise Portal.

C H A P T E R 2 5

GRANTING ACCESS TO NAVIGATION PAGES IN SCM

In order to access the navigation pages, security to the Navigation Page IScripts must be granted to all users.

Task Overview

The following table summarizes the tasks in this chapter.

Task No.	Task Name
Task 25-1	Adding User Roles to All User IDs

Task 25-1: Adding User Roles to All User IDs

To add the EOPP_USER role to all users, use Data Mover to run the **EOPP_ADD_ROLE.DMS** script located in <PS_HOME>\scripts.

Note. When a new User ID is created, the EOPP_USER role should be added to the new User ID.

CHAPTER 26

ACCESSING FINANCIALS, ESA, AND SCM APPLICATIONS IN THE 9.0 ENTERPRISE PORTAL

Note. Only perform this task if you use the PeopleSoft Enterprise Portal product and wish to access your application from within the Enterprise Portal database.

The installation phase of your PeopleSoft application should only entail setting up a single link to the PeopleSoft application content provider. To set up the single link and the single sign on, see the Customer Connection "Peoplesoft Enterprise Portal Solutions 9.0 installation" documentation. Chapter 3 discusses setting up single sign on to your application database. Chapter 4 discusses accessing the PeopleSoft content providers. Appendices H and I discuss additional product-specific steps you may need to perform for fully functional navigation within the Enterprise Portal database. The Customer Connection site is at http://www4.peoplesoft.com/cc/.