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PeopleSoft Enterprise Financials/Supply Chain Management 9.1 for Brazil Installation

MARCH 2011

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Contents

About This Documentation

This preface discusses:

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Understanding This Documentation

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

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

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

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

Note. Before proceeding with your installation, check My Oracle Support to ensure that you have the latest version of this installation guide for the correct release of the PeopleSoft product that you are installing.

Audience

This documentation is written for the individuals responsible for installing and administering the PeopleSoft environment. This documentation assumes that you have a basic understanding of the PeopleSoft system. One of the most important components in the installation and maintenance of your PeopleSoft system is your on-site expertise.

You should be familiar with your operating environment and RDBMS and have the necessary skills to support that environment. You should also have a working knowledge of:

- SQL and SQL command syntax.
- PeopleSoft system navigation.

- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

Oracle recommends that you complete training, particularly the PeopleSoft Server Administration and Installation course, before performing an installation.

See Oracle University http://education.oracle.com

Typographical Conventions

To help you locate and understand information easily, the following conventions are used in this documentation:

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading *See Also* refer you to additional documentation that has more information regarding the subject.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
Note. Note text.	Text that begins with *Note.* indicates information that you should pay particular attention to as you work with your PeopleSoft system.

Convention	Description
Important! Important note text.	A note that begins with *Important!* is crucial and includes information about what you need to do for the system to function properly.
Warning! Warning text.	A note that begins with *Warning!* contains critical configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these products and product families:

- Oracle® BPEL Process Manager
- Oracle® Enterprise Manager
- Oracle® Tuxedo
- Oracle® WebLogic Server
- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Change Impact Analyzer
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Enterprise Customer Relationship Management
- Oracle's PeopleSoft Enterprise Financial Management
- Oracle's PeopleSoft Enterprise Human Resources Management Systems
- Oracle's PeopleSoft Enterprise Learning Management
- Oracle's PeopleSoft Enterprise Pay/Bill Management
- Oracle's PeopleSoft Enterprise PeopleTools
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Enterprise Portal Solutions
- Oracle's PeopleSoft Enterprise Staffing Front Office
- Oracle's PeopleSoft Enterprise Supply Chain Management

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

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

Related Information

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

- Enterprise PeopleTools PeopleBook: Getting Started with PeopleTools for your release. This documentation provides a high-level introduction to PeopleTools technology and usage.
- PeopleSoft Enterprise Application Fundamentals PeopleBook for your PeopleSoft application and release. This documentation provides essential information about the setup, design, and implementation of your PeopleSoft application.

To access PeopleSoft PeopleBooks, go to My Oracle Support and search for the PeopleSoft PeopleBooks for your application and release.

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

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

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

Understanding Part I

The chapters in this section of the documentation include installation instructions that apply to Oracle's PeopleSoft Enterprise Financial Management Solutions (FMS), PeopleSoft Enterprise Service Automation (ESA), PeopleSoft Staffing Front Office (SFO), and PeopleSoft Enterprise Supply Chain Management (SCM) applications for Brazil.

This section includes:

- Installing PeopleSoft PeopleTools and Creating the PeopleSoft Enterprise Financials/Supply Chain Management Database
- Configuring Application SQRs and COBOL for DB2 and the OS/390 Server
- Setting Database Requirements to Run the ChartField Configuration Process

Task 1-1: Using Oracle E-Delivery to Obtain Installation Files

Before beginning the installation, you must obtain the PeopleSoft Financials and Supply Chain Management 9.1 installation software for Brazil by downloading the necessary zip files from the Oracle E-Delivery web site. Use the documentation available on Oracle E-Delivery to ensure that you obtain all of the zip files that are required for your environment.

See http://edelivery.oracle.com

CHAPTER 2

Installing PeopleSoft PeopleTools and Creating the PeopleSoft Enterprise Financials/Supply Chain Management Database for Brazil

This chapter discusses:

- Prerequisites
- Installing PeopleSoft PeopleTools and Creating the PeopleSoft FSCM Database

Prerequisites

This section provides prerequisite installation instructions required to create the PeopleSoft Enterprise Financials/Supply Chain Management (FSCM) database for Brazil.

Before you install specific applications, you must install PeopleSoft Enterprise PeopleTools and create your PeopleSoft FSCM database. You must also set up the installation defaults and delete the summary trees from the System (SYS) database.

Note. Unless otherwise noted, PeopleSoft PeopleTools 8.51 or higher is required at install.

See *PeopleSoft Enterprise PeopleTools 8.51 Installation,* "Creating a Database."

Task 2-1: Installing PeopleSoft PeopleTools and Creating the PeopleSoft FSCM Database

This section discusses:

- Verifying the PeopleSoft PeopleTools Version
- Reviewing the PeopleSoft FSCM Demo Database Sizing Information
- Reviewing EDM Pool Considerations
- Setting Up Installation Defaults for the PeopleSoft FSCM System Database
- Deleting Summary Trees for the PeopleSoft FSCM System Database

Task 2-1-1: Verifying the PeopleSoft PeopleTools Version

The PeopleSoft Enterprise FSCM 9.1 database requires the installation of PeopleSoft PeopleTools 8.51 or higher.

Task 2-1-2: Reviewing the PeopleSoft FSCM Demo Database Sizing Information

The following table lists the approximate PeopleSoft FSCM 9.1 for Brazil Demo database size for each RDBMS platform.

Platform	Approximate Database Size
Oracle — Non-Unicode/Unicode	28.5 GB
DB2 LUW — Non-Unicode	38 GB
DB2 LUW — Unicode	70 GB
DB2 z/OS — Non-Unicode	25 GB
DB2 z/OS — Unicode	33 GB
Microsoft SQL Server — Non-Unicode	5.4 GB
Microsoft SQL Server — Unicode	7.55 GB

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

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

Task 2-1-3: Reviewing EDM Pool Considerations

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

Task 2-1-4: Setting Up Installation Defaults for the PeopleSoft FSCM System Database

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

```
EBINSSYS.DMS -- Installation Defaults
```

This script establishes the installation defaults for the database. You should only run this script against the System (SYS) database.

Task 2-1-5: Deleting Summary Trees for the PeopleSoft FSCM System Database

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

```
EPCLNTRE.DMS -- Tree Definitions
```


This script deletes all of the summary trees from the database. You should only run this script against the System (SYS) database.

Chapter 3

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

This chapter discusses:

- Understanding SQR and COBOL Processing on the DB2 z/OS Server for Brazil
- Allocating Data Sets on the OS/390 File Systems
- Modifying the JCL Shells

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

This section applies to PeopleSoft FSCM product customers for Brazil using the DB2 OS/390 database platform who want to run SQR and COBOL processes on the OS390 server that require reading of or writing to external files.

For both SQR and COBOL processing on the DB2 z/OS server, standard JCL templates are provided, which are used by the Process Scheduler to submit jobs in the z/OS 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 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 made to the JCL shells.

Task 3-1: Allocating Data Sets on the OS/390 File Systems

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 that follows for SQR LRECL definitions.
- The data set name type should be PDS (DSORG=PO).

Here is an example of a JCL statement to allocate a PDS:

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

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

PeopleSoft Enterprise Product	SQR or COBOL Program Name	DD Card Name[1]	Data Set Type / Record Format / Record Length	Member Name or Random Name[2]
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)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

The following tables detail the information that can be used to both pre-allocate the data set and modify the JCL Shells for PeopleSoft SCM in the next step.

PeopleSoft Inventory:

SQR or COBOL Program Name	DD Card Name[1]	Data Set Type / Record Format / Record Length	Member Name or Random Name[2]
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)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

PeopleSoft Manufacturing:

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

[1]DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

Task 3-2: Modifying the JCL Shells

There are three shells delivered with the PeopleSoft release. 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 six SQRs that reference a total of 10 special input or output files, and these SQRs use the SHELSQRF.JCT JCLshell, then 10 DD statement cards will need to be added to the appropriate section of the SHELSQRF.JCT file.

The following is an example of the editing required in JCL shell SHELSQRF.JCL to accommodate special files referred to as INSQR1 and INSQR2 in the SQR programs (change is in bold font):

```
//*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 for the edits in the JCL shells to take effect.

CHAPTER 4

Setting Database Requirements to Run the ChartField Configuration Process for Brazil

Understanding Database Requirements for the ChartField Configuration Process for Brazil

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

Task 4-1: Defining Settings to Run ChartField Configuration

Here are the recommended settings to use when running ChartField Configuration for supported database platforms:

- DB2 LUW
  - 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.

- DB2 z/OS

  No changes recommended.

- Microsoft SQL Server 2000

  Log Space = 1500MB

- Oracle
  - 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.

CHAPTER 5

Part II: Installing PeopleSoft FMS, ESA and SFO Applications for Brazil

Understanding Part II

This section includes:

- Installing PeopleSoft Enterprise 9.1 General Ledger
- Installing and Setting Up Forms Processing for PeopleSoft Enterprise 9.1 Grants
- Installing PeopleSoft Enterprise 9.1 Expenses
- Installing PeopleSoft Enterprise 9.1 Pay/Bill Management
- Installing PeopleSoft 9.1 ESA and FSCM Portal Packs
- Integrating PeopleSoft Enterprise 9.1 Project Costing and Program Management with Microsoft Project 2007
- Defining an FTP Server for File Attachments in PeopleSoft Enterprise 9.1 Project Costing
- Setting Up PeopleSoft Enterprise 9.1 Staffing Front Office
- Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management
- Installing PeopleSoft Enterprise 9.1 Maintenance Management with Microsoft Project 2007
- Integrating PeopleSoft Enterprise 9.1 Asset Management with eCenterOne Space Management Solution
- Integrating PeopleSoft 9.1 Asset Management with Physical Inventory Solutions
- Integrating PeopleSoft Enterprise 9.1 IT Asset Management with Network Inventory Discovery Systems

CHAPTER 6

Installing PeopleSoft 9.1 General Ledger for Brazil

This chapter discusses:

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

Prerequisites

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

The file import processes discussed in this chapter depend on the setup described in the following table:

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

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

The 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:

1. Select PeopleTools, Utilities, Administration, URLs.

2. Open GL_FILE_IMPORT.
3. Change to an FTP server location of your choice.

See Also

PeopleSoft Enterprise PeopleTools 8.51 PeopleBook: PeopleCode Developer's Guide, "Understanding File Attachments and PeopleCode."

Task 6-2: Defining an Environmental Variable on a 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 z/OS process scheduler, edit the 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 a Microsoft Windows process scheduler, select Start, Programs, Control Panel, System. Select the Advanced Tab, and click Environment Variables. Add or modify the system variable `PS_FILEDIR`, and specify its value. For example:

```
C:\TEMP
```

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

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

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

For those running the following specific import processes:

```
GL_F2_MAF
GLFACTSI_MAF
GL_GOALS_IMP
```

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

CHAPTER 7

Installing and Setting Up Forms Processing for PeopleSoft Enterprise 9.1 Grants for Brazil

This chapter discusses:

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

Understanding Forms Processing for Brazil

The PeopleSoft Enterprise Grants forms printing solution for Brazil uses file layouts to generate XML. This is accomplished using existing PeopleSoft PeopleTools functionality. Through the use of XML/XFDF, the PeopleSoft Grants forms solution maps all of the required data elements to the actual sponsor forms. As a result, you can edit and print forms online using Adobe Acrobat Reader 5.0. Because this solution uses standard PeopleSoft PeopleTools technology, you no longer need to engage an additional component (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 7-1: Downloading the Forms from the Sponsor Web Sites

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

- http://grants.nih.gov/grants/funding/2590/2590_forms.pdf

  Full Package of 2590 Reports that include: Grant Progress Report, Form Page 1 - Continued, Detailed Budget for Next Budget Period – Direct Costs Only, Budget Justification/Current Budget Period, Progress Report Summary, Checklist, All Personnel Report, Next Budget Period, Targeted/Planned Enrollment Table, Inclusion Enrollment Report, Trainee Diversity Report
- http://grants.nih.gov/grants/funding/phs398/398_forms.pdf

  Grant Application
- http://grants.nih.gov/grants/funding/phs398/biosketch.pdf

  Biographical Sketch
- http://grants.nih.gov/grants/funding/phs398/continuation.pdf

  Continuation Format Page
- http://grants.nih.gov/grants/funding/phs398/fp4.pdf

  Detailed Budget for Initial Budget Period Direct Costs Only
- http://grants.nih.gov/grants/funding/2590/enrollment.pdf

  Targeted/Planned Enrollment Form
- http://www.fhwa.dot.gov/aaa/pdfs/sf269a.pdf

  Financial Status Report - Short Form
- http://www.whitehouse.gov/sites/default/files/omb/grants/sf269.pdf

  Financial Status Report - Long Form
- http://www.whitehouse.gov/sites/default/files/omb/grants/sf272.pdf

  Federal Cash Transactions Report
- http://www.tc.faa.gov/logistics/grants/forms/sf272a.pdf

  Report of Federal Cash Transactions - Continued

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

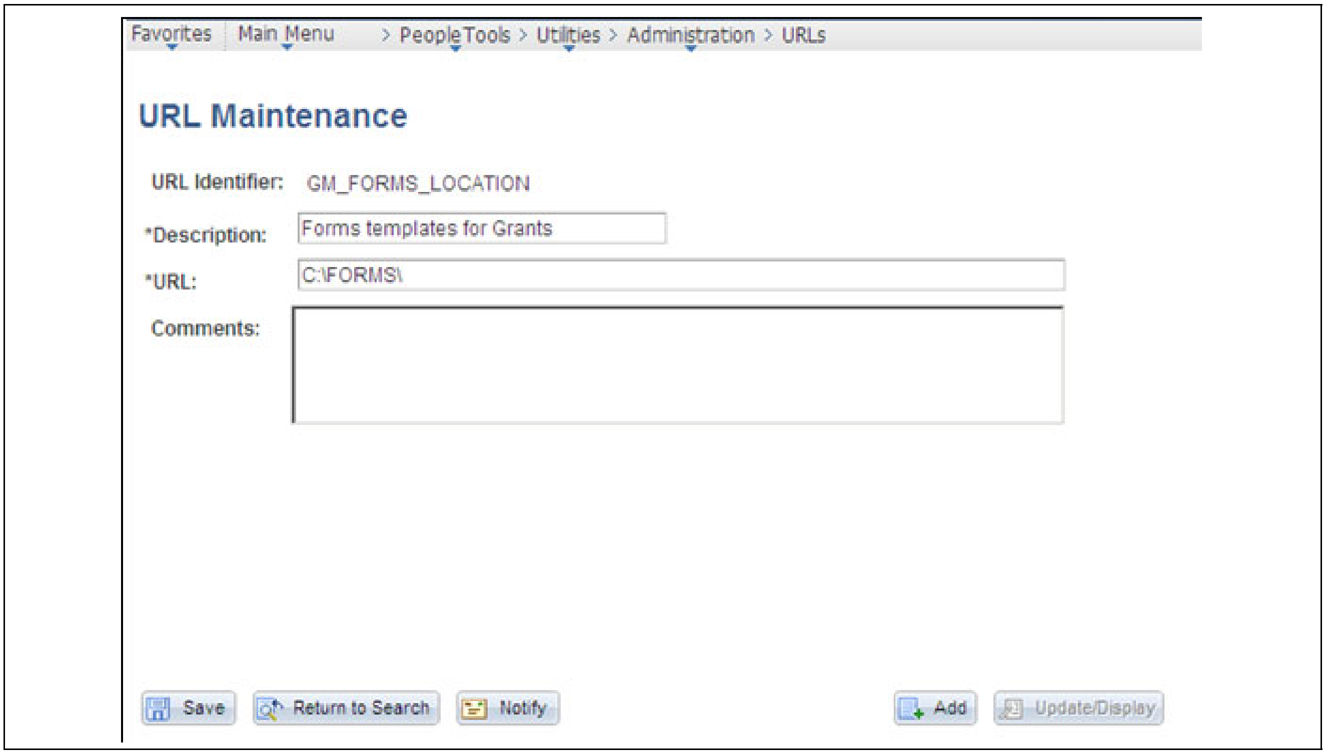
See Setting Up the Forms URL Maintenance Area in PeopleSoft.

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

To set up the forms URL maintenance area:

1. Select PeopleTools, Utilities, Administration, URLs.

2. On the URL search page, search for and select the URL identifier *GM_FORMS_LOCATION*, as shown in the following example:



URL Maintenance page

3. On the URL Maintenance page, enter the location where you placed the forms in the URL field.

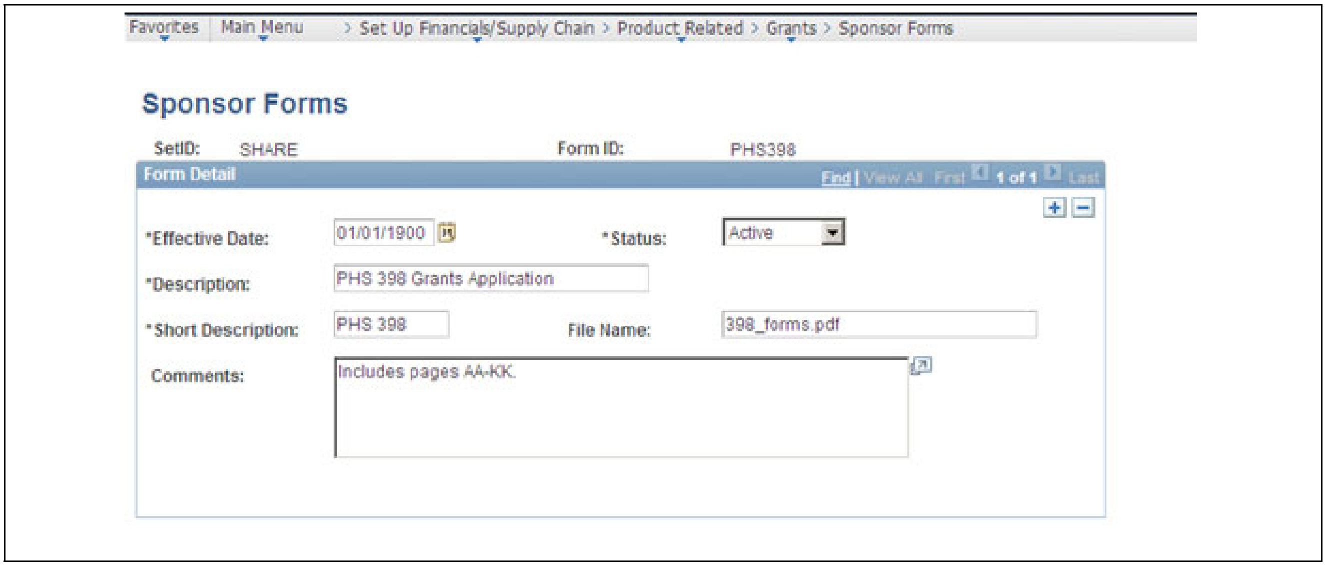
   This location can be a file system location such as G:\FORMS\. In this case, the users need to have access to this location when viewing the printed forms. This location can also be a Web address such as http://www.university.edu/Administration/Grants/Forms/.

4. Click Save.

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

To enter the PDF template names:

1. Select Set Up Financials/Supply Chain, Product Related, Grants, Sponsor Forms to access the Sponsor Forms page, as shown in the following example:



Sponsor Forms page

2. On the SPonsor Forms page, search for and access the pages for the forms in the following table using an appropriate SETID value.

   Then ensure that the file names listed in the following table are reflected in the File Name field.

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

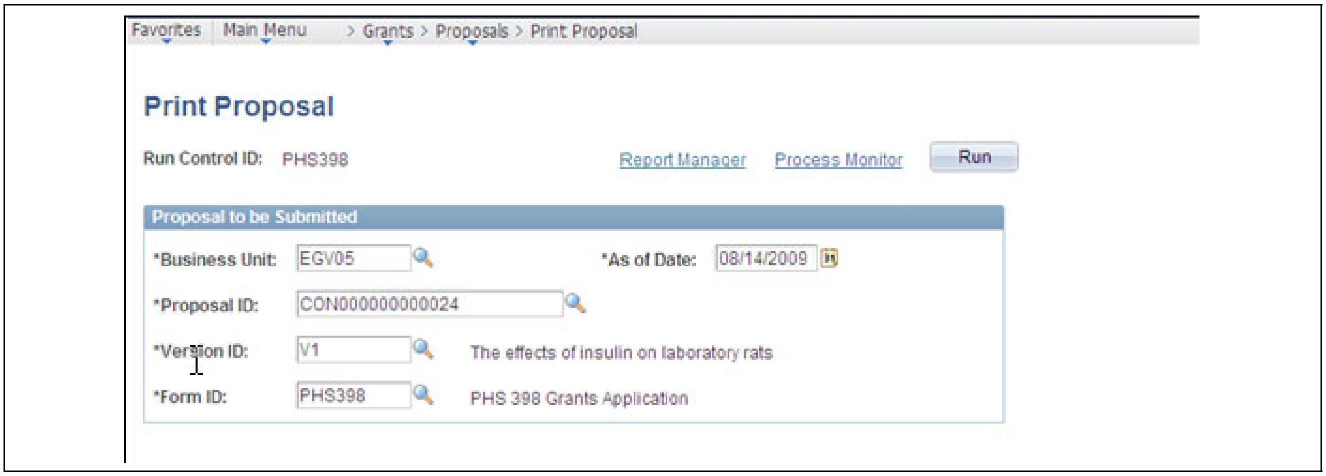
Form ID	File Name (example)
PHS398	398_Forms.PDF
2590	2590_Forms.PDF
NIHMOD	398_Modular.PDF

Task 7-4: Printing the Forms (Optional)

To print the forms:

1. Select Grants, Proposal, Print Proposal to access the Create Printed Proposal page.
2. Create your own Run Control ID.
3. Select the Business Unit, Proposal ID, Version ID, and Form ID of the proposal that you are submitting.

   Select the valid values from the options that display when you click the look up button, as shown in the following example:



Proposal to be Submitted page

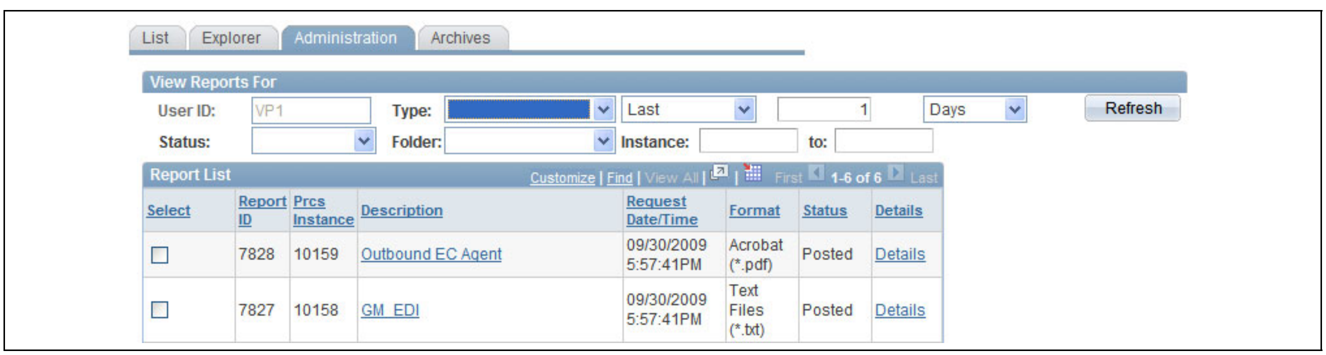
4. Click Run.
5. On the Process Scheduler Request page, in the Server Name field, select the server that you want to use.
6. Click OK.

Task 7-5: Viewing Reports

To view reports you need Adobe Acrobat Reader 5.0 or higher.

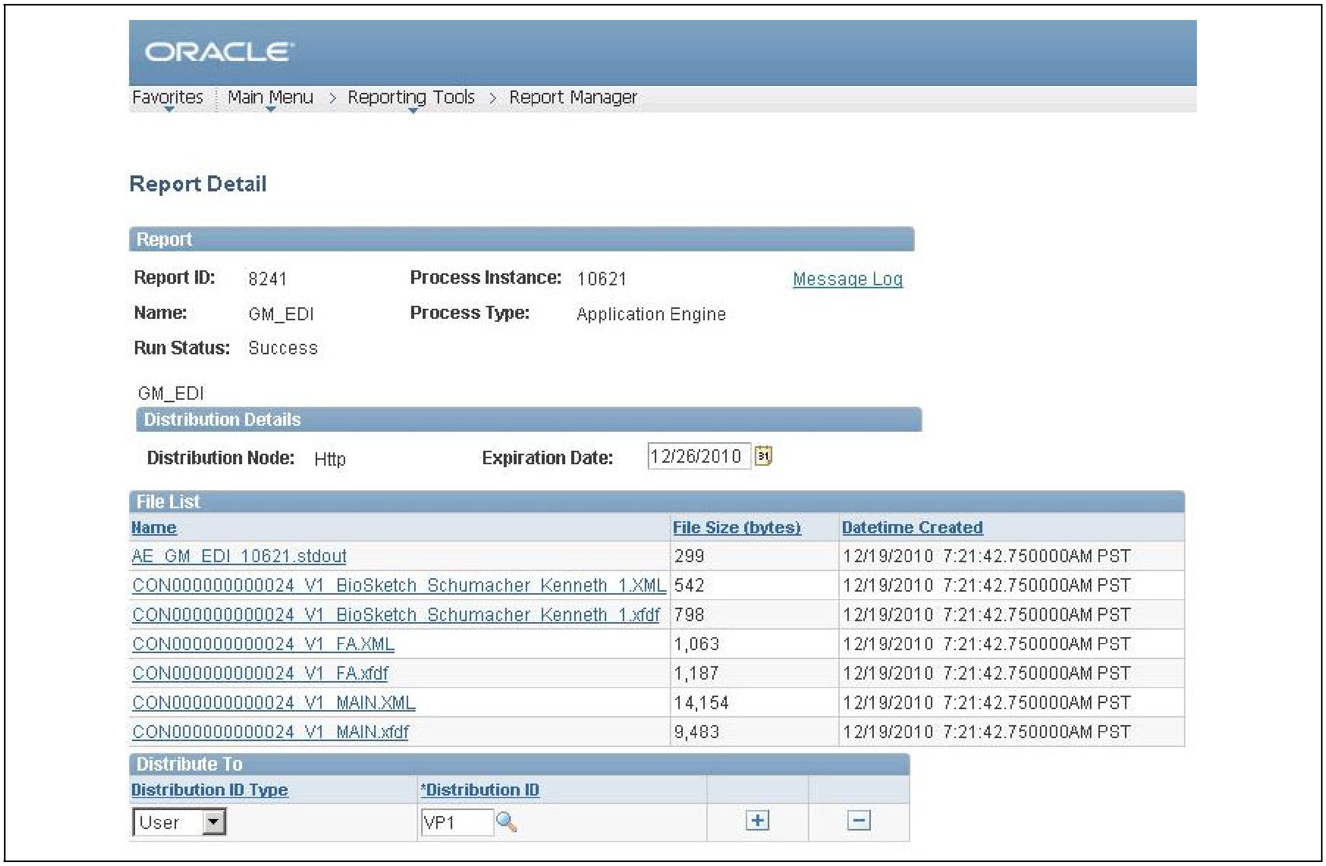
To view reports:

1. Select Reporting Tools, Report Manager, Administration, to access the Report Manager - Administration page, as shown in the following example:



Report Manager - Administration page

2. On the Administration page, locate your process instance (the report description is GM_EDI).
3. Click the Details link in the GM_EDI row to see a list of the files that are related to the proposal, as shown in the following example:



Report Detail page

4. To view or print a file, download it to a local location.
5. Click the file to open it.

CHAPTER 8

Installing PeopleSoft Enterprise 9.1 Expenses for Brazil

This chapter discusses:

- Configuring PeopleSoft Integration Broker
- Configuring the Employee Portal Servlet URL
- Installing Oracle iReceipts for Your Apple iPhone

Task 8-1: Configuring PeopleSoft Integration Broker

Understanding the PeopleSoft Integration Broker Configuration

This chapter covers the configuration of the PeopleSoft Integration Broker for Approvals.

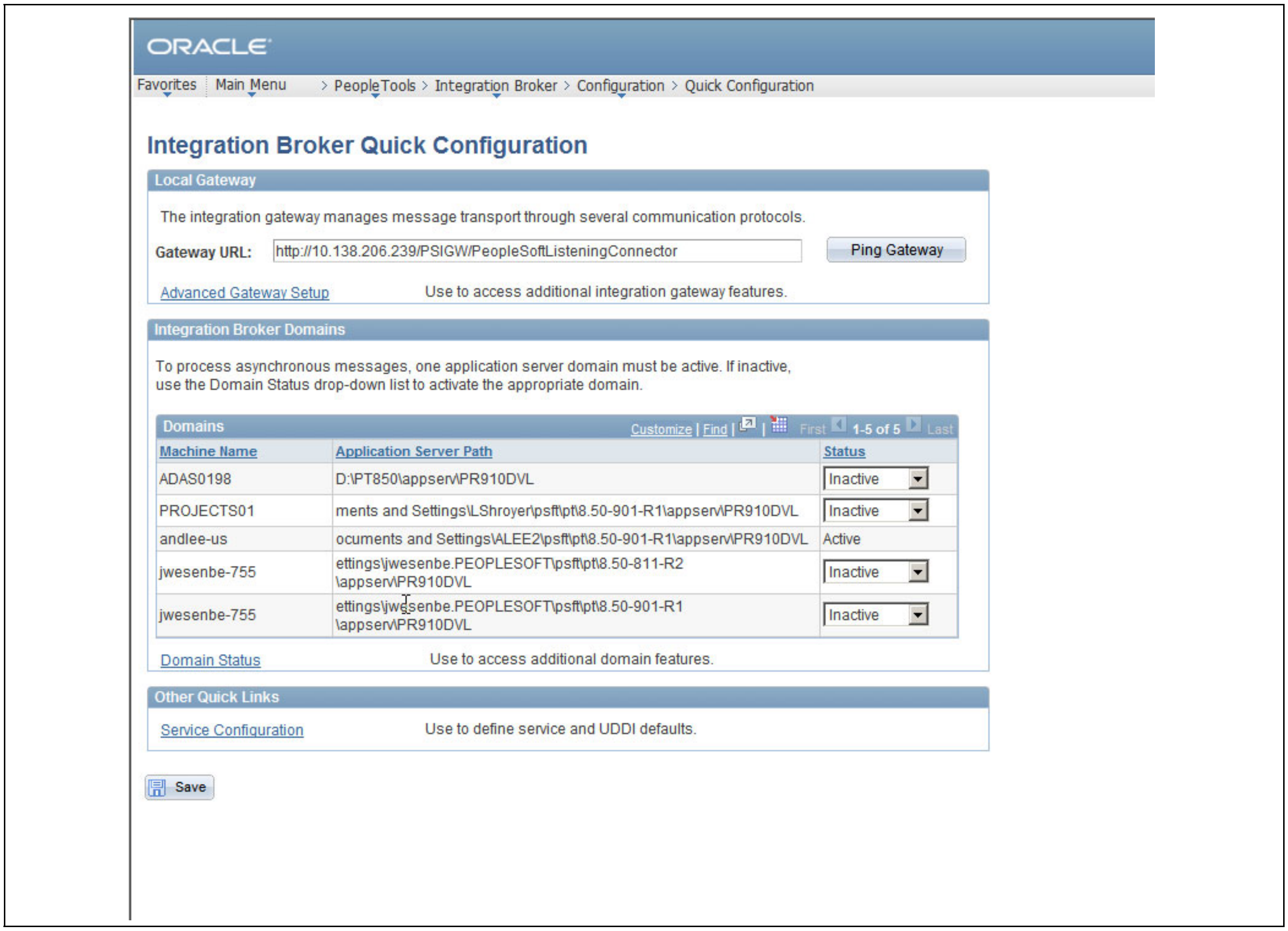
This task confirms that the settings for Quick Configuration, Gateways and Service Configuration are properly configured.

Task 8-1-1: Setting Up Quick Configuration

To verify the quick configuration settings:

1. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.
2. On the Integration Broker Quick Configuration page, in the Gateway URL field, enter *http://<IB Hostname>:<port>/PSIGW/PeopleSoftListeningConnector*.

   The colon and <port> entry are optional if the port number is the default, as shown in the following example:



Integration Broker Quick Configuration page

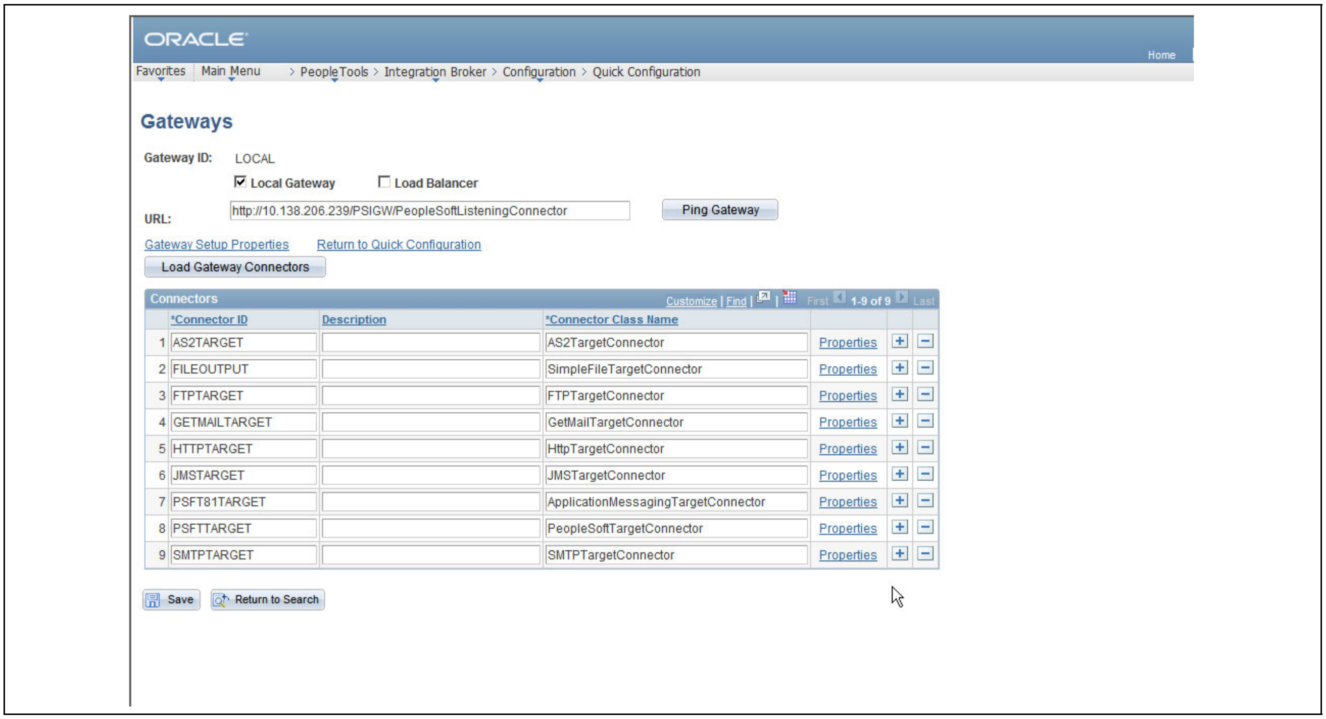
3. Click Save.
4. Ping the gateway to verify that it is responding.

   Be sure to note the exact PeopleSoft PeopleTools version, as you will use it in the next step.

Task 8-1-2: Setting Up Gateways

To set up the local gateway and load balancer:

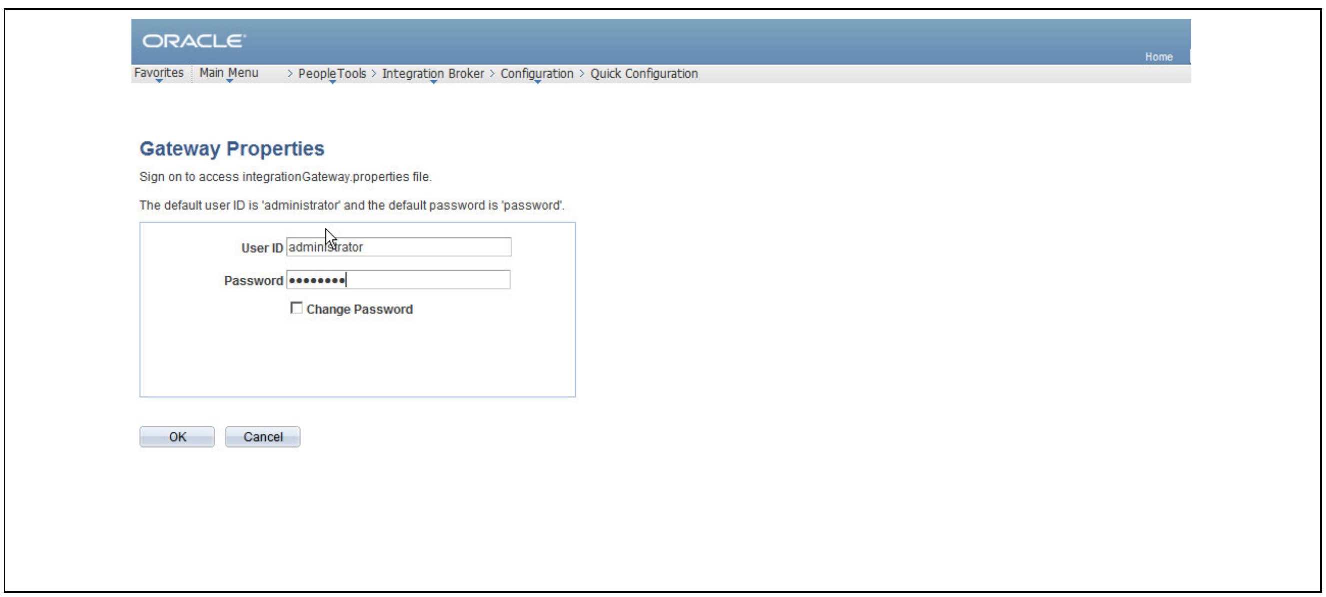
1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. The Gateways page for the local gateway appears automatically by default.
3. On the Gateways page, select the Local Gateway check box and the Load Balancer check box.
4. Enter the URL for the Local Gateway and the Physical Gateway as *http://<IB Hostname>:<port>/PSIGW /PeopleSoftListeningConnector*, as shown in the following example:



Gateways page

5. Click the Load Gateway Connectors button.
6. Click Save.
7. Click the Ping Gateway button to ensure connectivity and proper configuration.
8. Click the Gateway Setup Properties link.

   The Gateway Properties sign in page appears, as shown in the following example.



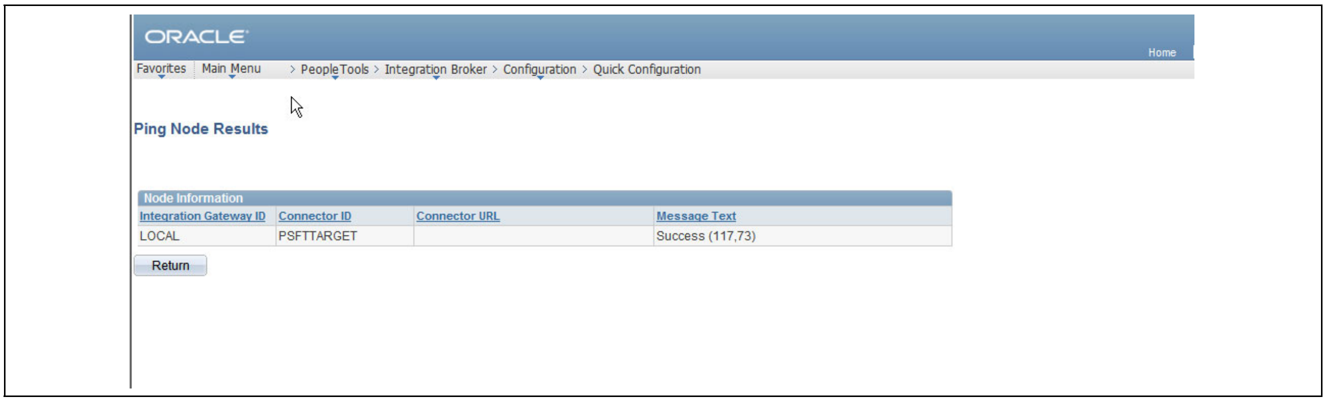
Gateways - Gateway Properties Sign in page

9. On the Gateway Properties sign in page, in the User ID field enter *administrator*, and in the password field enter the password.

10. On the Gateway Properties page, in the Gateway Default App. Server group box, enter values for the following fields:
    - App Server URL
    - User ID
    - Ppassword
    - Tools Release
11. Click the Add (+) button to add the node *PSFT_EP* (the PeopleSoft FSCM application server node).

    Use the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway, as it must match exactly.
12. Click Save.
13. Ping the PSFT_EP node to verify that it is responding.

    If a ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results page

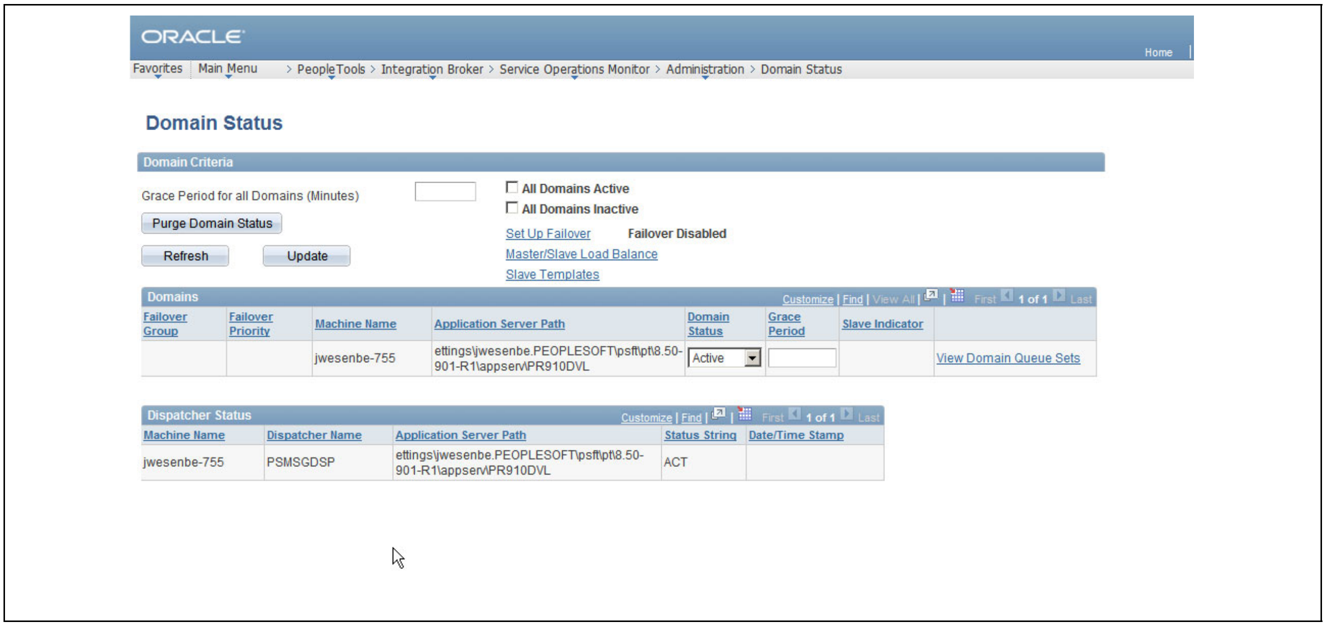
Task 8-1-3: Activating the Local Domain

To activate the local domain:

Note. The PUB server should be up before performing this step.

---

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status to access the Domain Status page, as shown in the following example:.



Domain Status page

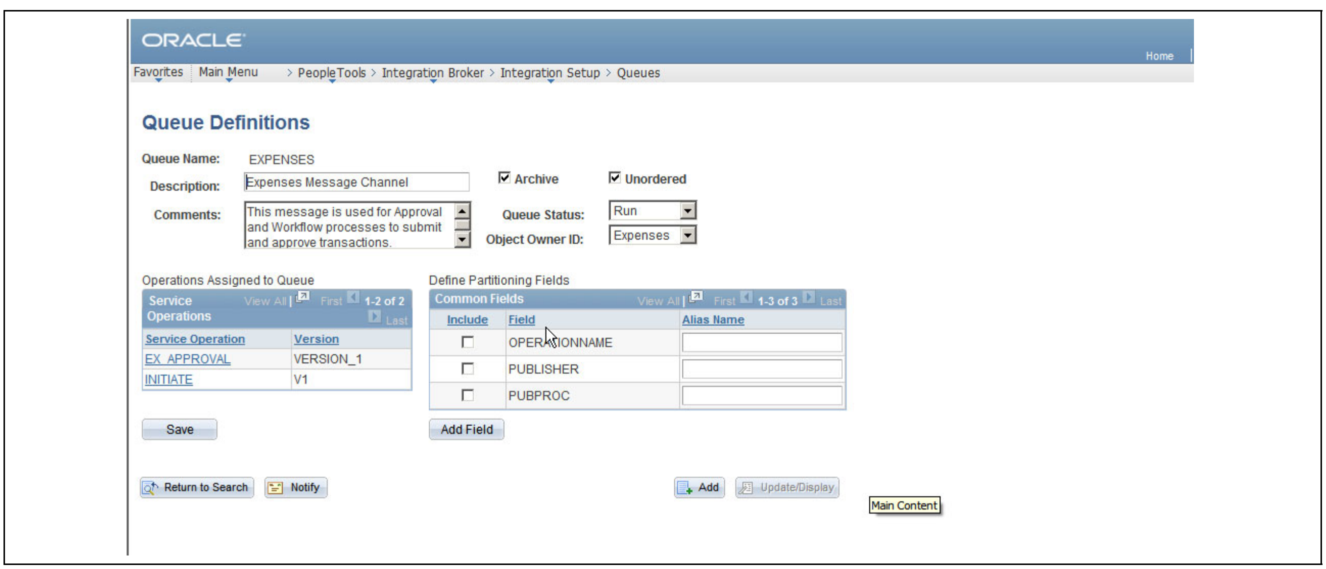
2. On the Domain Status page, click the Purge Domain Status button.
3. In the Domain Status field (next to your application server), select *Active* from the drop-down list box.
4. Click the Update button.

Note. If your machine name does not appear in this list, click the Purge Domain Status button and then click the Refresh button.

Task 8-1-4: Activating Queue Definitions

To activate queue definitions:

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



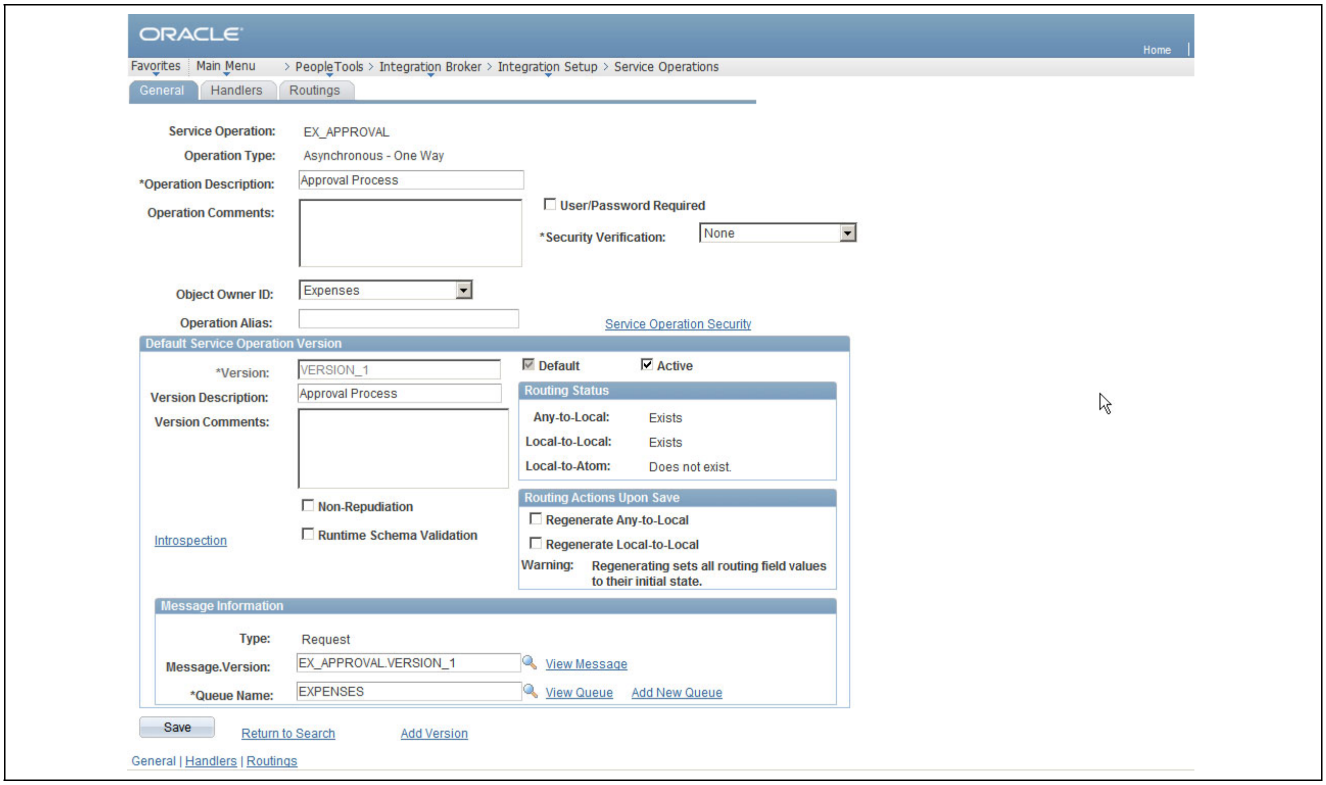
Queue Definitions page

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

Task 8-1-5: Setting up Service and Handlers

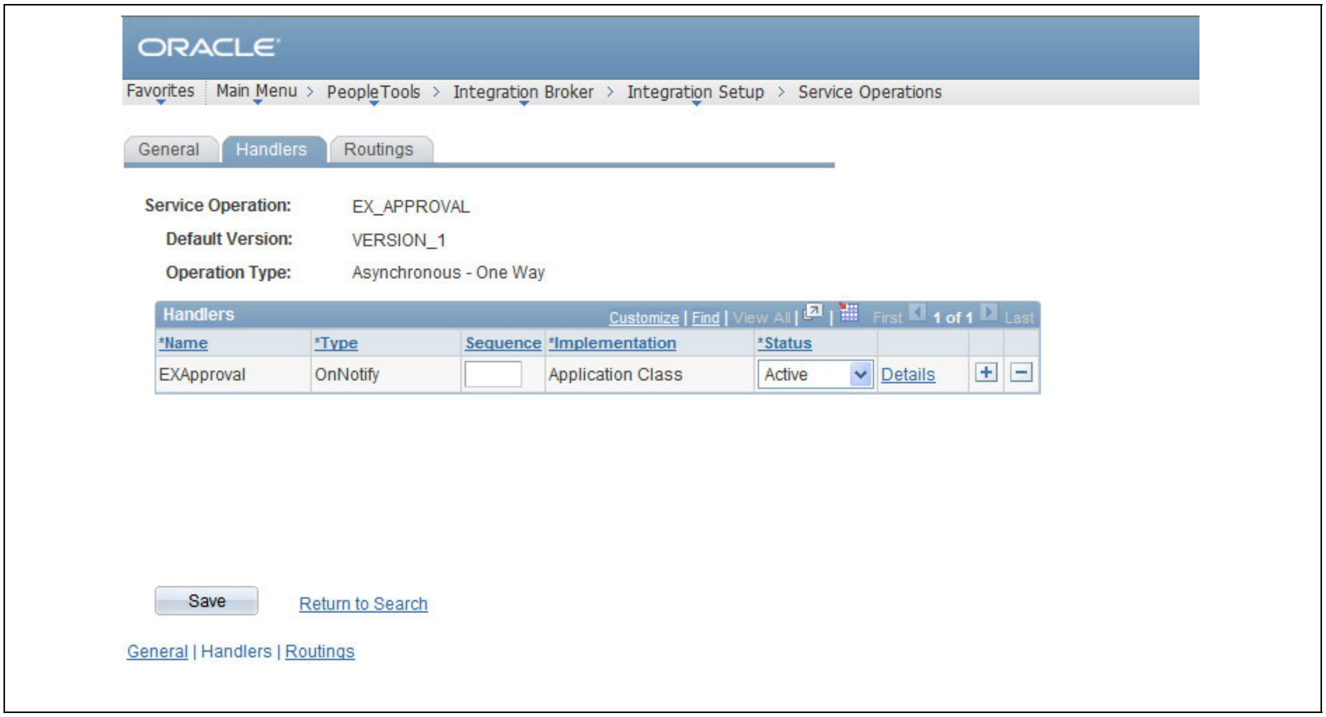
To set up service and handler:

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



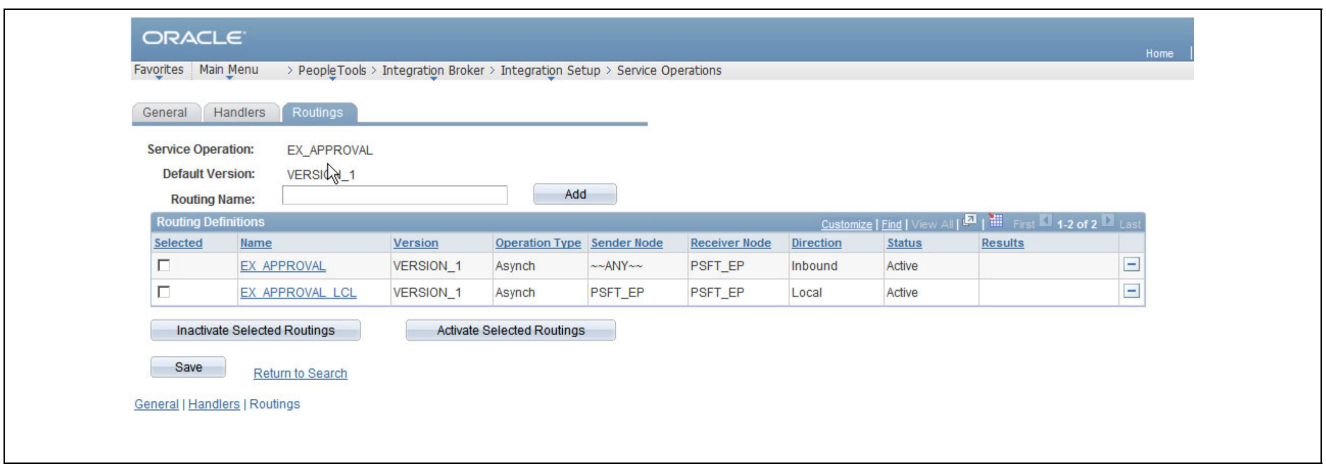
Service Operations - General page

3. On the Service Operations - General page, in the Default Service Operation Version group box, select the Active check box.
4. Click Save.
5. Select the Handlers tab and access the Handlers page, as shown in the following example:



Service Operations - Handlers tab

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



Routings page for Service Operation

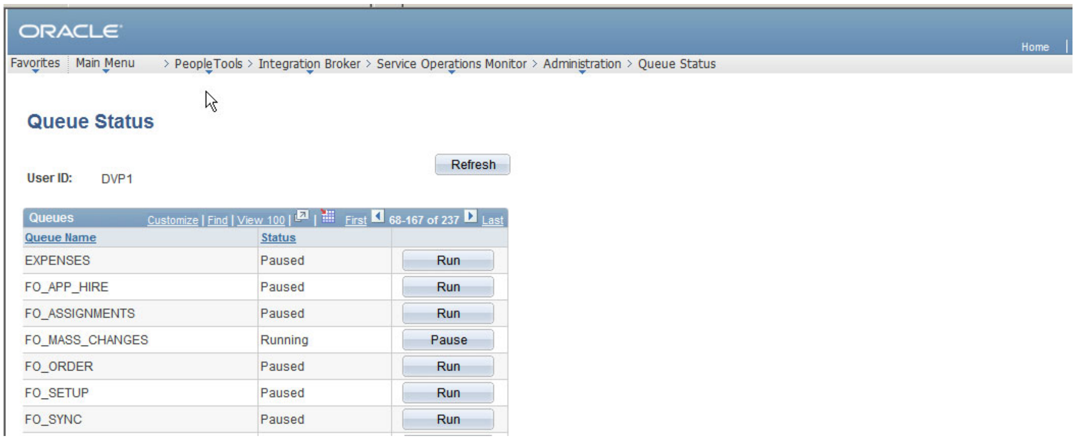
9. On the Routings page, in the Routing Definitions group box, select the check boxes for the routings that you want to activate.
10. Click the Activate Selected Routings button.
11. Click Save.

Task 8-1-6: Verifying the Message Channel Status

To run the message channel:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status.
2. On the Queue Status page, verify that the status for the queue name EXPENSES is *Running*.

   If it is *Paused*, click the Run button, as shown in the following example:



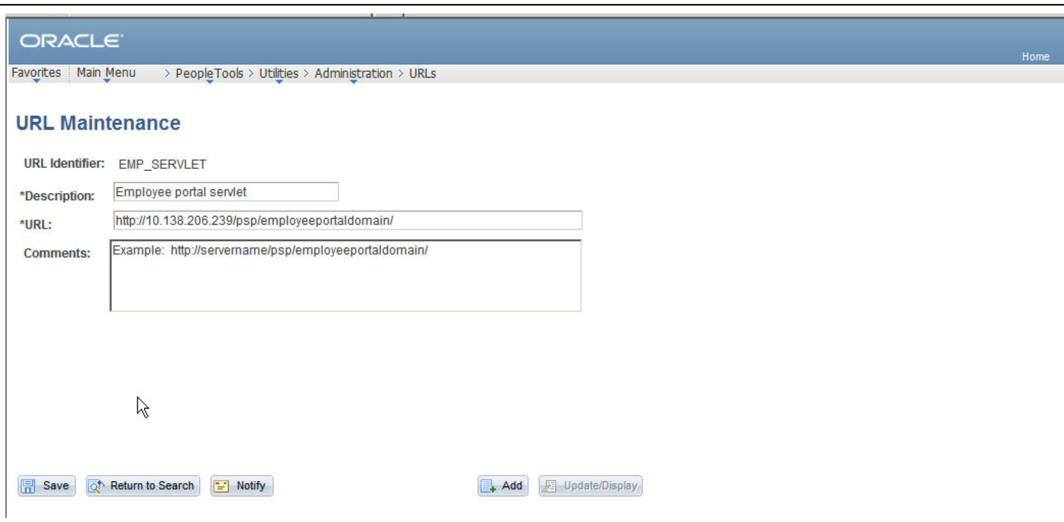
Queue Status page

Task 8-2: Configuring the Employee Portal Servlet URL

To configure the URL for the Employee Portal Servlet (EMP_SERVLET):

1. Select PeopleTools, Utilities, Administration, URLs.
2.
3. On the URLs search page, search for and select the URL identifier *EMP_SERVLET*.

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



URL Maintenance page

4. On the URL Maintenance page, in the URL field, enter your machine's server name and append it with the following:

/psp/<employeeportaldomain>/ where <employeeportaldomain> is the site name of your employee portal domain.

For example, http://serverx/psp/empdb910.

5. Click Save.

Task 8-3: Installing Oracle iReceipts for Your Apple iPhone

This section discusses:

- Prerequisites
- Verifying Correct Namespaces for Messaging
- Setting Up Web Services for My Wallet Transactions
- Setting Up Service Operations for My Wallet Transactions

Prerequisites

Oracle iReceipts is a financial application that enables you to capture cash receipts, create expense lines, and send expense lines to your expense application using a mobile device.

To use the Oracle iReceipts feature in PeopleSoft Enterprise Expenses 9.1 with your Apple iPhone™, you must comply with the following requirements:

- License and install the PeopleSoft Expenses 9.1 application to allow captured data to be sent to PeopleSoft Expenses and create expense reports.
- Install the required patch to interface Oracle iReceipts with Oracle's PeopleSoft Expenses 9.1.

  This patch is available on My Oracle Support (https://support.oracle.com/CSP/ui/flash.html).
- Ensure that your Apple iPhone™ is running the minimum operating system of 3.0 or higher.
- License and install the Oracle iReceipts application from the Apple iTunes Store to your Apple iPhone™.

For set up and configuration details, refer to the following documentation that is available on My Oracle Support:

See *PeopleSoft Enterprise Expenses 9.1 PeopleBook*

Task 8-3-1: Verifying Correct Namespaces for Messaging

To set up messaging, you must verify that a correct namespace is entered for the following required messages:

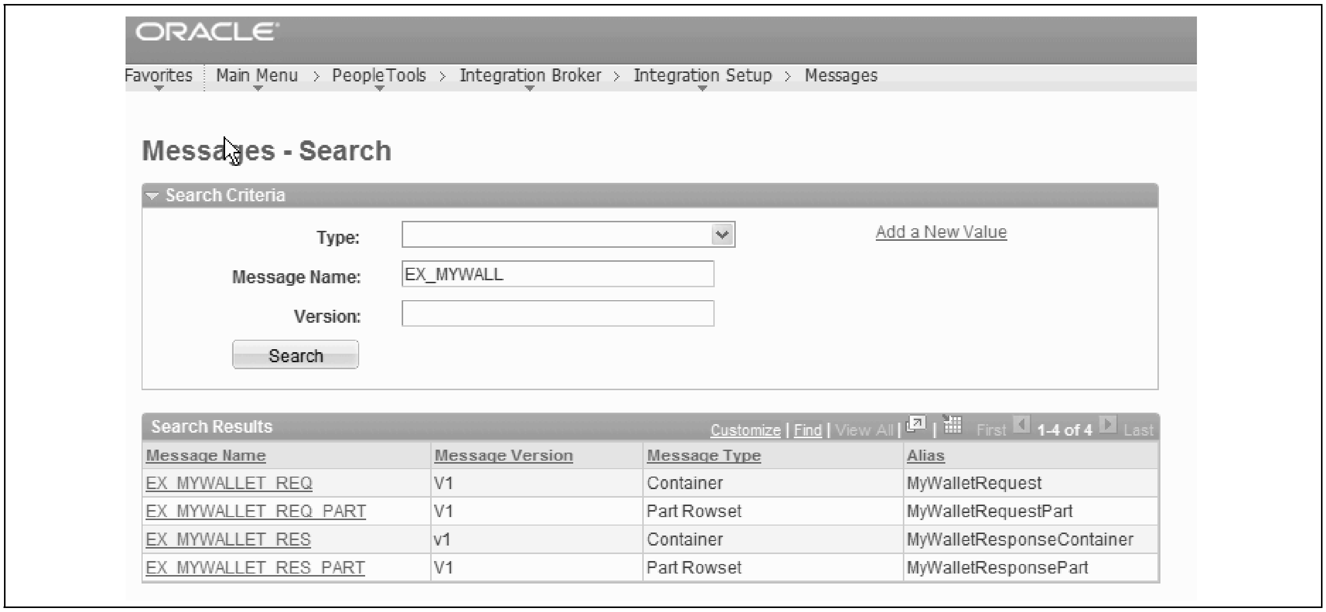
- My Wallet request message (EX_MYWALLET_REQ)
- My Wallet response message (EX_MYWALLET_RES)
- Container message for My Wallet requests (EX_MYWALLET_REQ_PART)
- Container message for My Wallet responses (EX_MYWALLET_RES_PART)

Note. These steps are only required if you are sending expense information from the Oracle iReceipts application on your Apple iPhone™ to PeopleSoft Expenses.

To verify that the correct namespaces are entered for each of the required messages:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. On the Message search page, in the Message Name field, enter *EX_MYWALL* and click Search.

   The Messages search page displays search results for EX_MYWALL in the Search Results grid, as shown in the following example:



Messages search page

   The messages that display in the Message Name column of the preceding search results example (EX_MYWALLET_REQ, EX_MYWALLET_REQ_PART, EX_MYWALLET_RES, and EX_MYWALLET_RES_PART) are the four required messages that you must verify correct namespaces.

3. In the Search Results grid, in the Message Name field, click the link for the message EX_MYWALLET_REQ to access the Message Definition - Schema page, as shown in the following example:

Message Definition - Schema page

4. On the Message Definition - Schema page, verify that a correct namespace is entered for the EX_MYWALLET_REQ message.

   Note. Namespaces will vary according to how each environment is set up. Therefore, it is necessary to enter the correct namespace that is defined specifically for your system. This should be performed for all four messages.

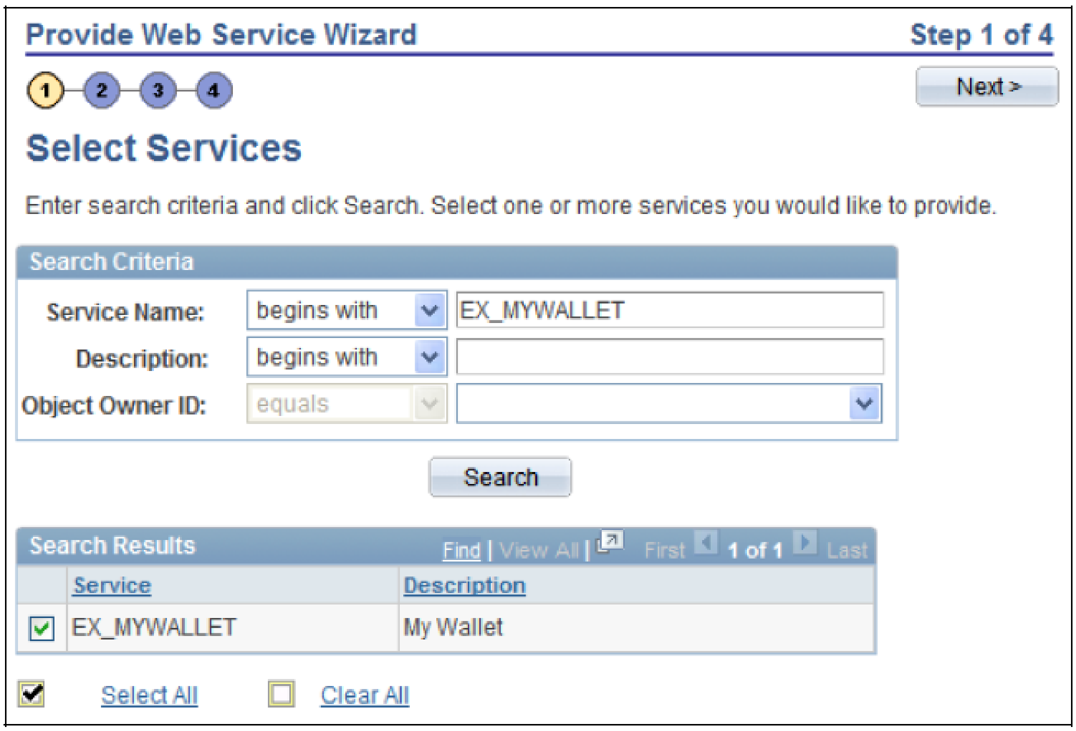
5. Repeat steps 3–4 for each of the four messages (EX_MYWALLET_REQ, EX_MYWALLET_REQ_PART, EX_MYWALLET_RES, and EX_MYWALLET_RES_PART) to verify that correct namespaces are entered.

Task 8-3-2: Setting Up Web Services for My Wallet Transactions

To set up web services for My Wallet transactions:

1. Select PeopleTools, Integration Broker, Web Services, Provide Web Service.

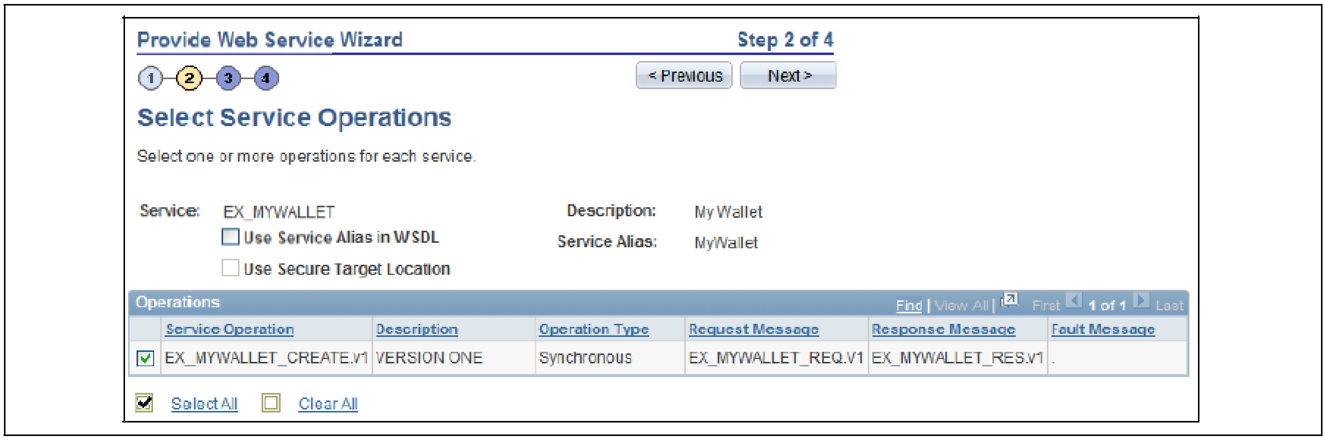
   The Provide Web Service Wizard - Select Services page (Step 1 of 4) appears, as shown in the following example:



Provide Web Service Wizard - Select Services page (Step 1 of 4)

2. In the Service Name field, enter *EX_MYWALLET*.
3. Click Search.
4. In the Service search results that display, select the EX_MYWALLET service.
5. Click Next.

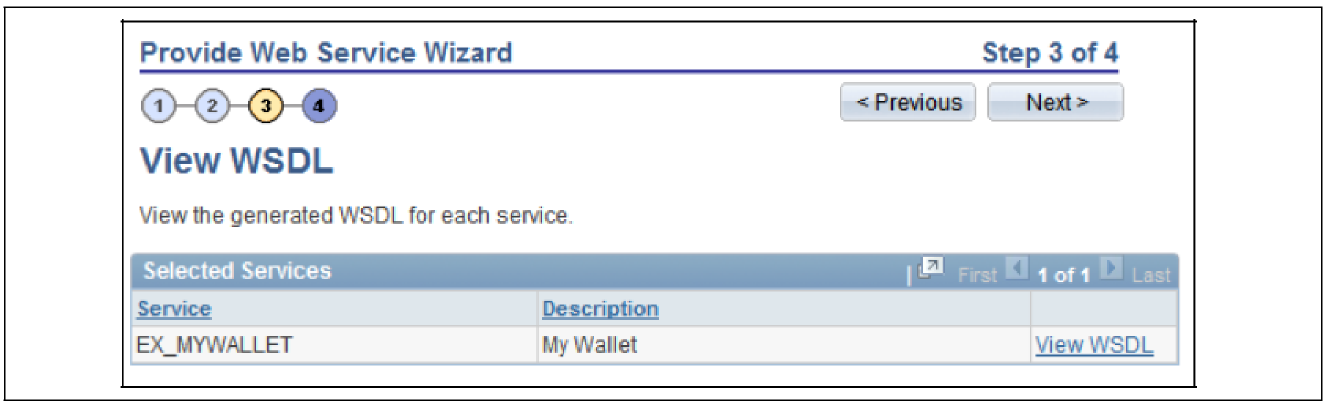
   The Provide Web Service Wizard - Select Service Operations page (Step 2 of 4) appears, as shown in the following example:



Provide Web Service Wizard - Select Service Operations page (Step 2 of 4)

6. In the Operations grid, select the EX_MYWALLET_CREATE.v1 service operation.
7. Click Next.

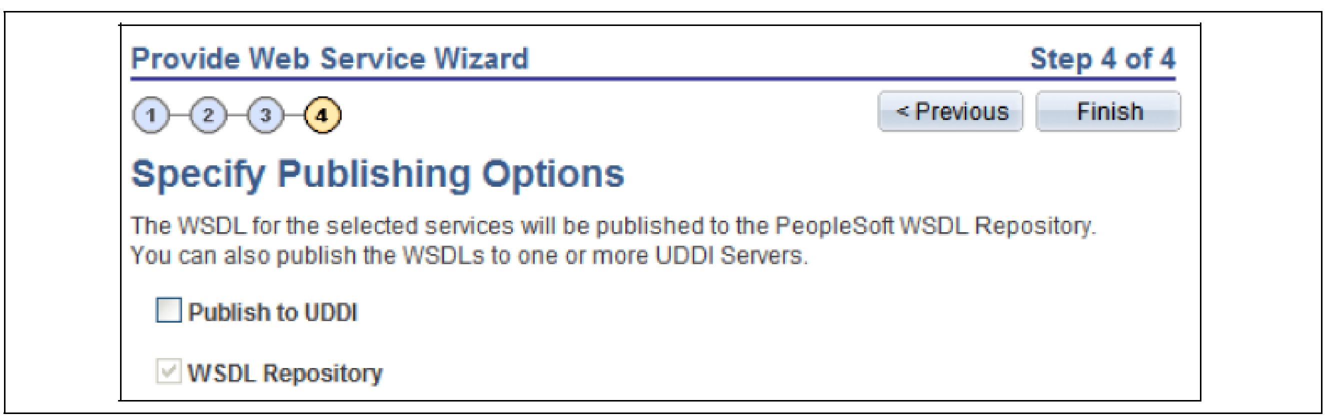
   The Provide Web Service Wizard - View WSDL page (Step 3 of 4) appears, as shown in the following example:



Provide Web Service Wizard - View WSDL page (Step 3 of 4)

8. Click Next.

   The Provide Web Service Wizard - Specify Publishing Options page (Step 4 of 4) appears, as shown in the following example:



Provide Web Service Wizard - Specify Publishing Options page (Step 4 of 4)

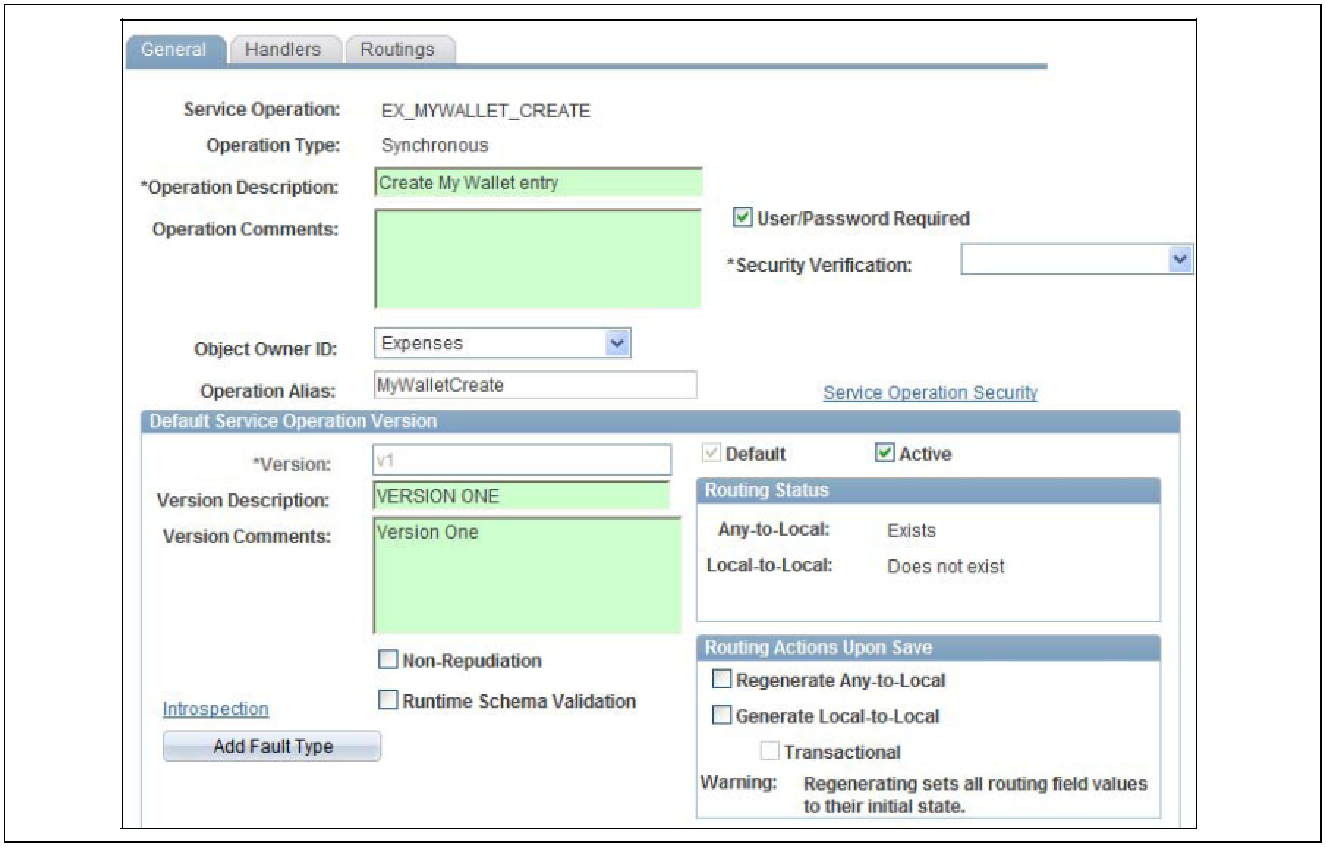
9. Click Finish.

Task 8-3-3: Setting Up Service Operations for My Wallet Transactions

To set up service operations for My Wallet transactions:

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

   The Service Operations - General page appears, as shown in the following example:

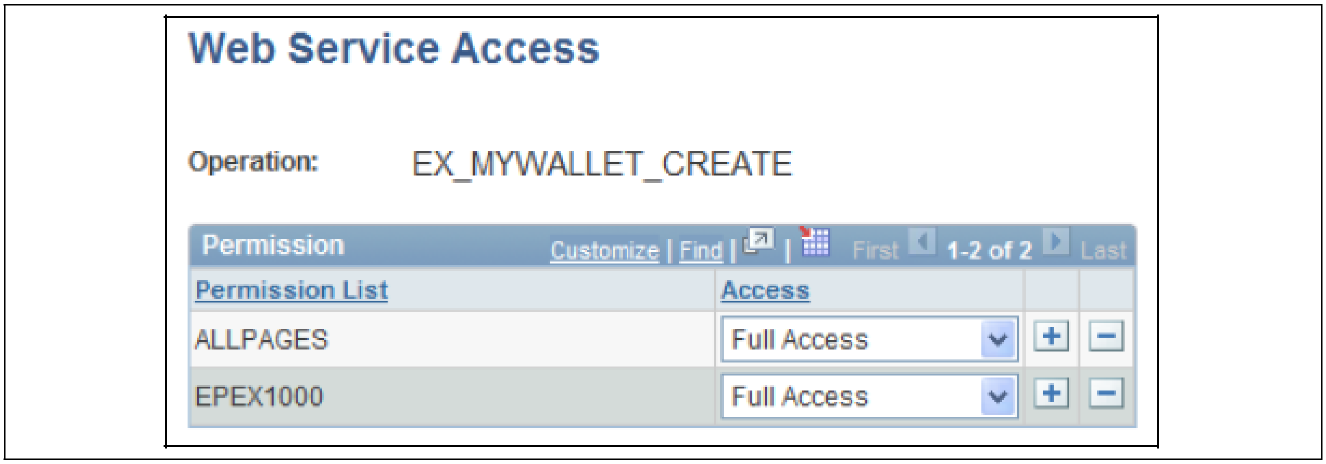


Service Operations - General page 1 of 2

Service Operations - General page 2 of 2

2. On the General page, in the Service Operation field, enter *EX_MYWALLET_CREATE*.
3. Click the Service Operation Security link.

   The Web Service Access page appears, as shown in the following example:



Web Service Access page

4. In the Permission group box, click the Add (+) button to add the permission lists that are authorized to access the service operation.
5. Click Save.

CHAPTER 9

Installing PeopleSoft Enterprise 9.1 Pay/Bill Management for Brazil

This chapter discusses:

- Understanding PeopleSoft Enterprise 9.1 Pay/Bill Management for Brazil
- Prerequisites
- Verifying Integration Points
- Checking the Installation Table for PeopleSoft HCM and PeopleSoft FSCM

Understanding PeopleSoft Enterprise 9.1 Pay/Bill Management for Brazil

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

See *PeopleSoft Enterprise Pay/Bill Management 9.1 PeopleBook.*

See *Enterprise PeopleTools PeopleBook: Integration Broker Administration* for your release.

Prerequisites

In this step, you set up node definitions for your PeopleSoft HCM environment.

You must install PeopleSoft Enterprise Pay/Bill Management 9.1 for PeopleSoft HRMS before you can fully use the PeopleSoft Pay/Bill Management application. The complete installation instructions for PeopleSoft Pay/Bill Management for PeopleSoft HRMS are posted on My Oracle Support.

See *PeopleSoft Enterprise HRMS 9.1 Installation Guide.*

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

Task 9-1: Verifying Integration Points

Understanding Integration Points Verification

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

PSFT_EP is the default local node in PeopleSoft FSCM, but PSFT_HR also exists in PeopleSoft FSCM. This section details how to set both nodes in the PeopleSoft FSCM environment.

PSFT_HR is the default local node for PeopleSoft HCM, but PSFT_EP also exists in PeopleSoft HCM. This section details how to set both nodes in the PeopleSoft HCM environment.

Note. Ensure that your application servers, for both PeopleSoft HRMS and PeopleSoft FSCM installations, are set to manage Pub/Sub server.

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

Understanding Node Definition Set Up for Single Signon

The PeopleSoft FSCM and PeopleSoft HCM environments contain both message nodes PSFT_EP and PSFT_HR. You must set both message nodes in both environments.

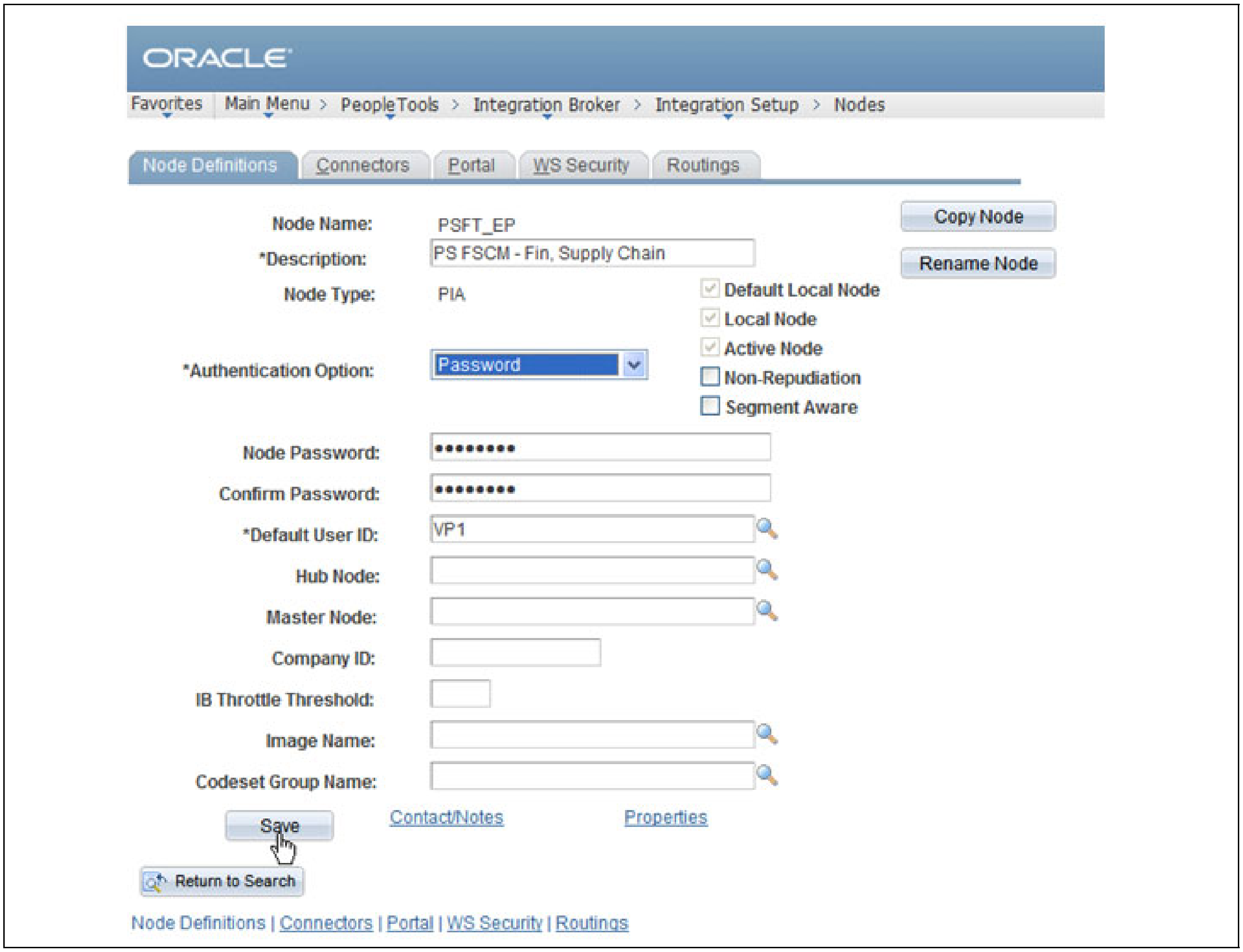
PSFT_EP is the default local node in PeopleSoft FSCM. PSFT_HR also exists in PeopleSoft FSCM and must be set.

PSFT_HR is the default local node in PeopleSoft HCM. PSFT_EP also exists in PeopleSoft HCM and must be set.

Setting Up Message Node Definitions in PeopleSoft FSCM

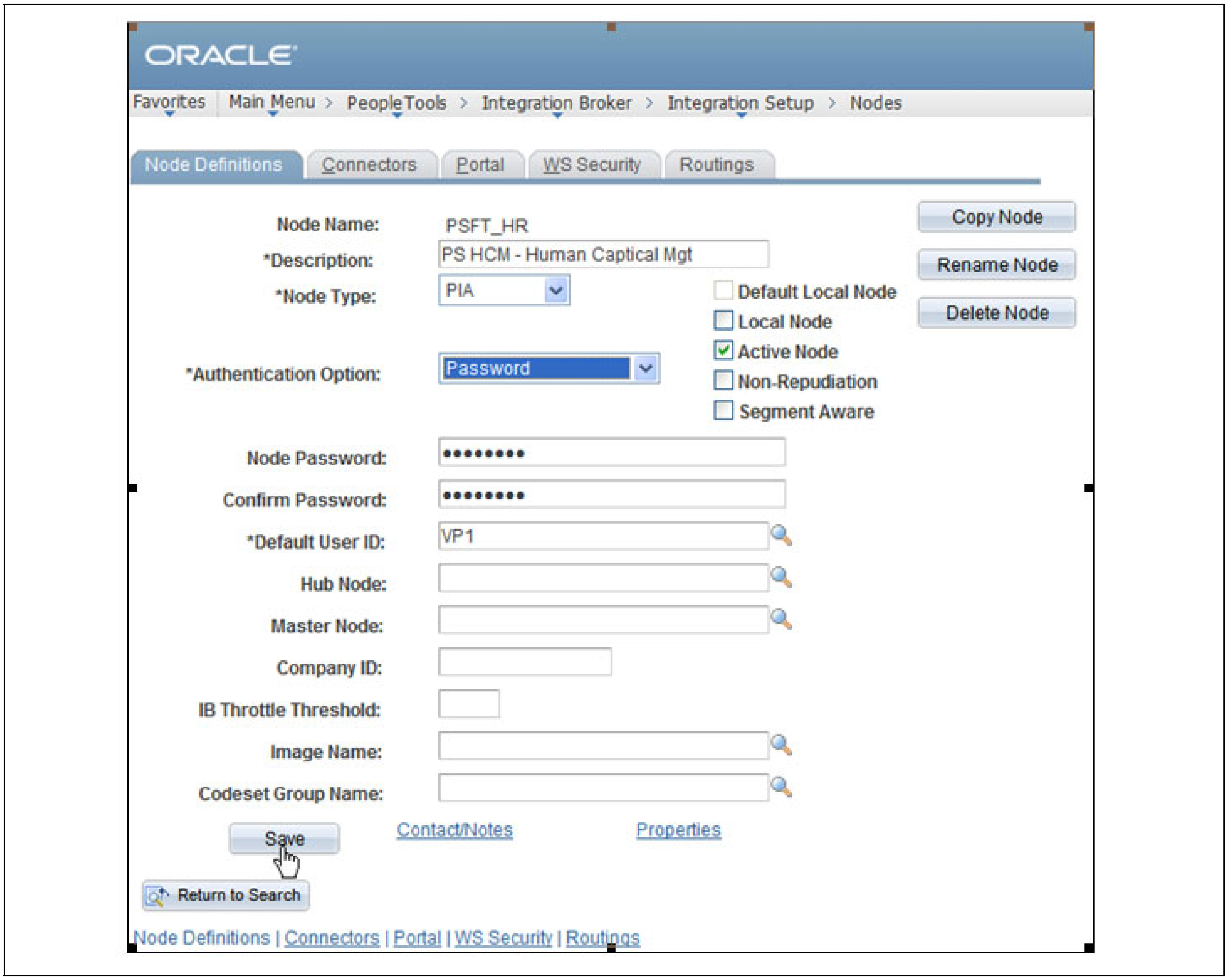
To set up message node definitions in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_EP*.
3. Select the Node Definitions tab to access the Node Definitions page for the PSFT_EP node, as shown in the following example:



Node Definitions for FSCM - PSFT_ EP Node

4. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
5. In the Node Password field, enter a password.
6. In the Confirm Password field, re-enter your password.
7. Click Save, and then click the Return to Search button.
8. On the Nodes search page, search for and select the node name *PSFT_HR*.
9. Select the Node Definitions tab to access the Node Definitions page for the PSFT_HR node, as shown in the following example:



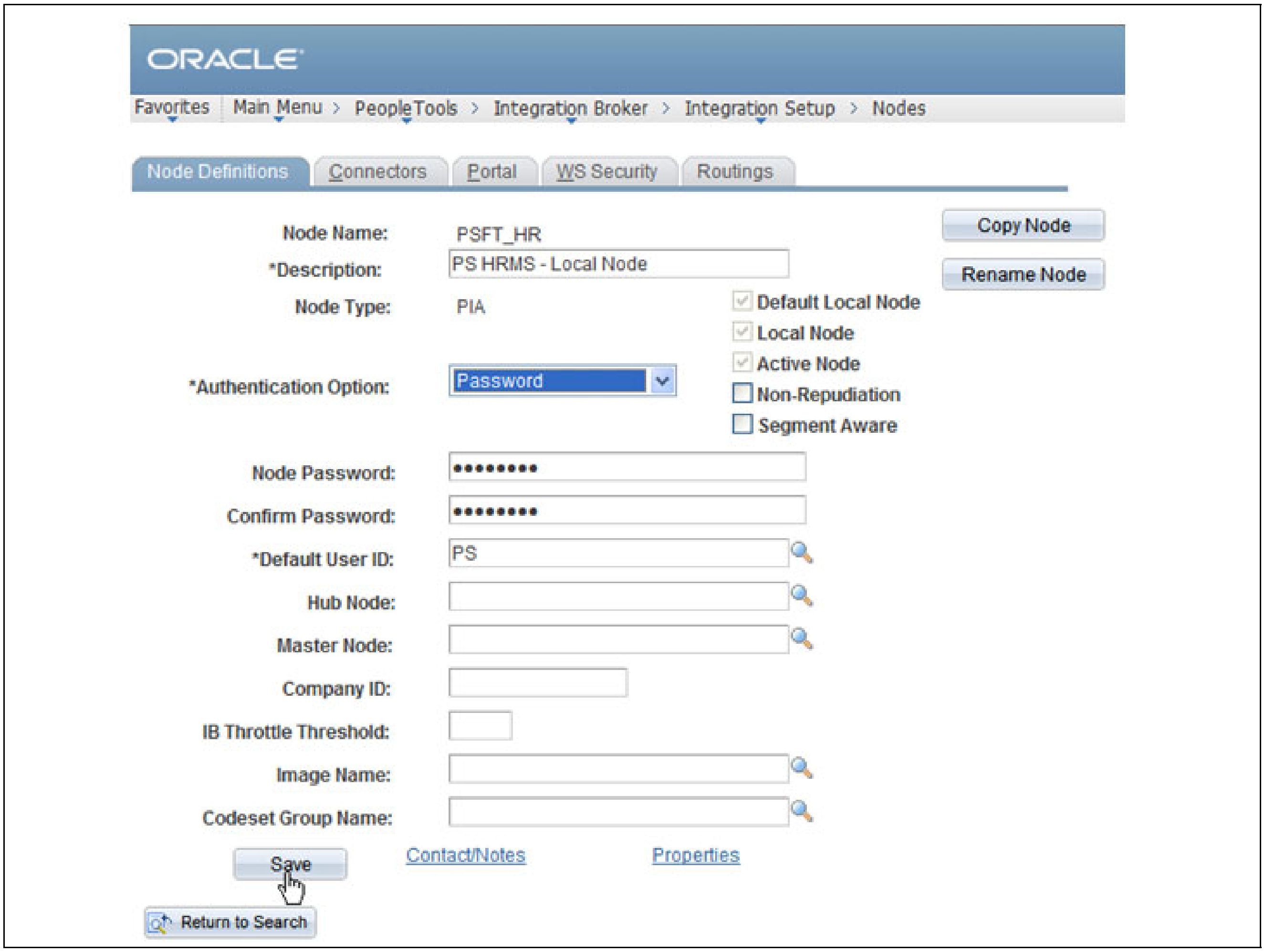
Node Definitions for FSCM

10. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
11. In the Node Password field, enter a password.
12. In the Confirm Password field, re-enter your password.
13. Click Save.

Setting Up Message Node Definitions in PeopleSoft HCM

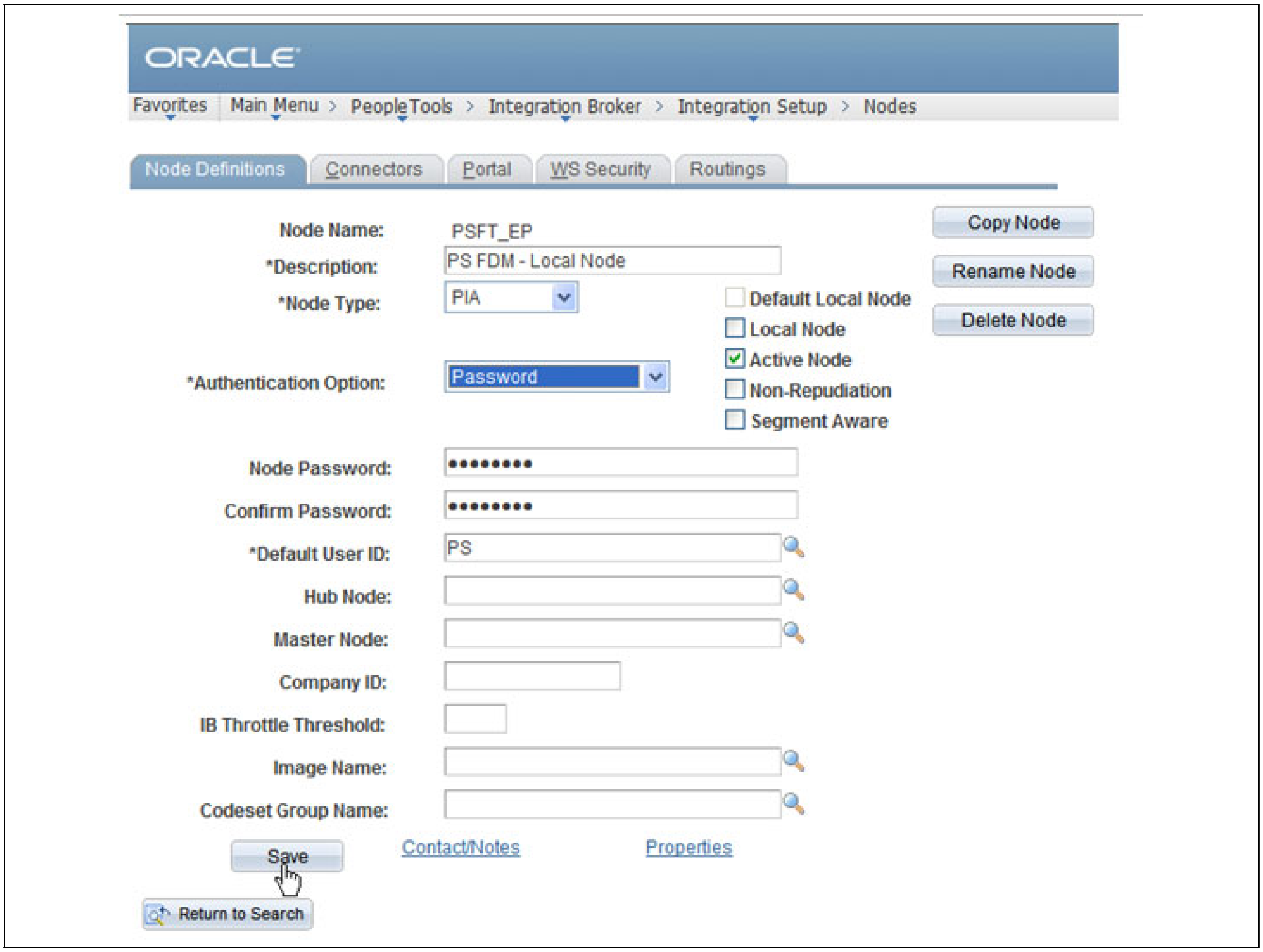
To set up message node definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_HR*.
3. Select the Node Definitions tab to access the Node Definitions page for the PSFT_HR node, as shown in the following example:



Node Definitions HCM - PSFT_HR node

4. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
5. In the Node Password field, enter a password.
6. In the Confirm Password field, re-enter your password.
7. Click Save, and then click Return to Search button.
8. On the Nodes search page, search for and select the node name *PSFT_EP*.
9. Select the Node Definitions tab to access the Node Definitions page for the PSFT_EP node, as shown in the following example:



Node Definitions for HCM - PSFT_EP node

10. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
11. In the Node Password field, enter a password.
12. In the Confirm Password field, re-enter your password.
13. Click Save.

Task 9-1-2: Setting Up Portal Nodes

Understanding Portal Nodes Set Up

The PeopleSoft FSCM and PeopleSoft HCM environments contain both ERP and HRMS Portal Nodes. You must set both Portal Nodes in both environments.

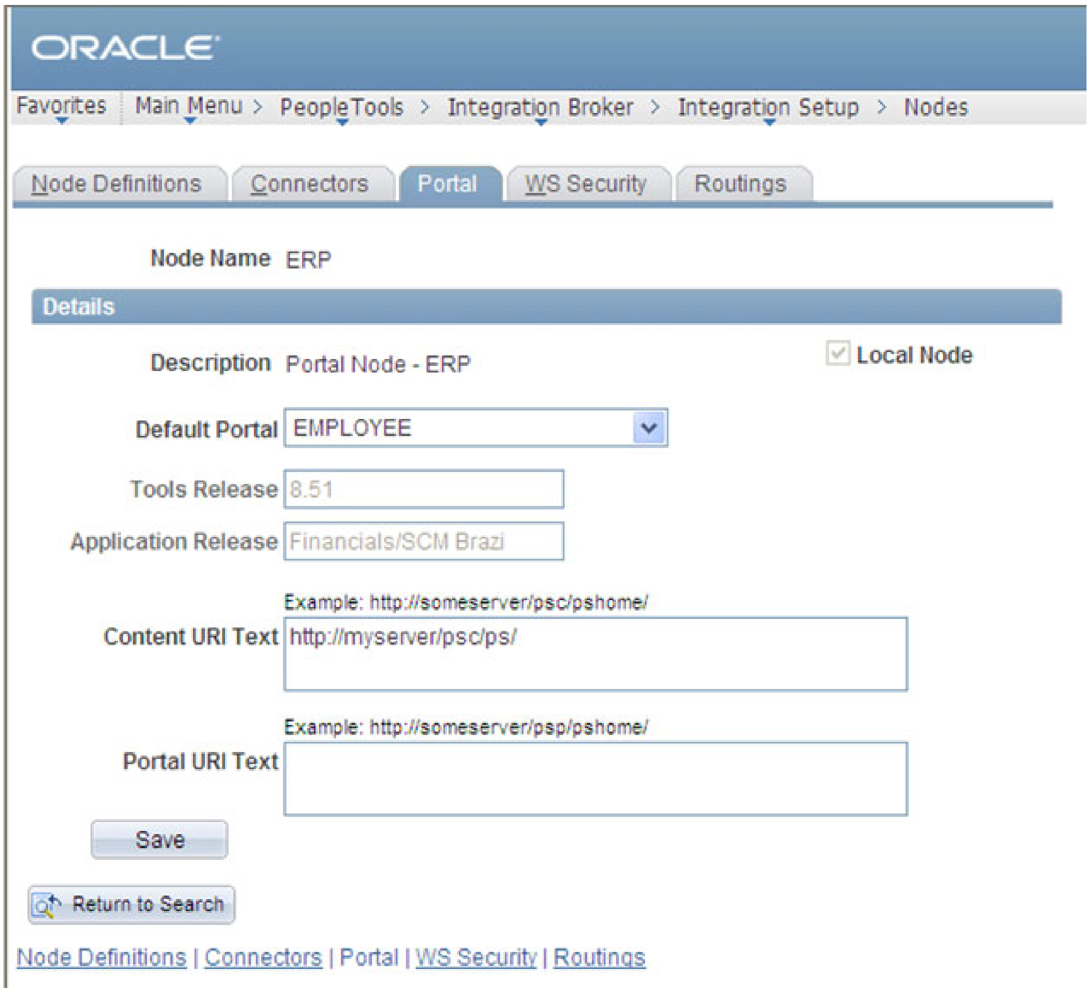
ERP is the local node in PeopleSoft FSCM. HRMS also exists in PeopleSoft FSCM and must be set.

HRMS is the local node in PeopleSoft HCM. ERP also exists in PeopleSoft HCM and must be set.

Setting Up Portal Nodes in PeopleSoft FSCM

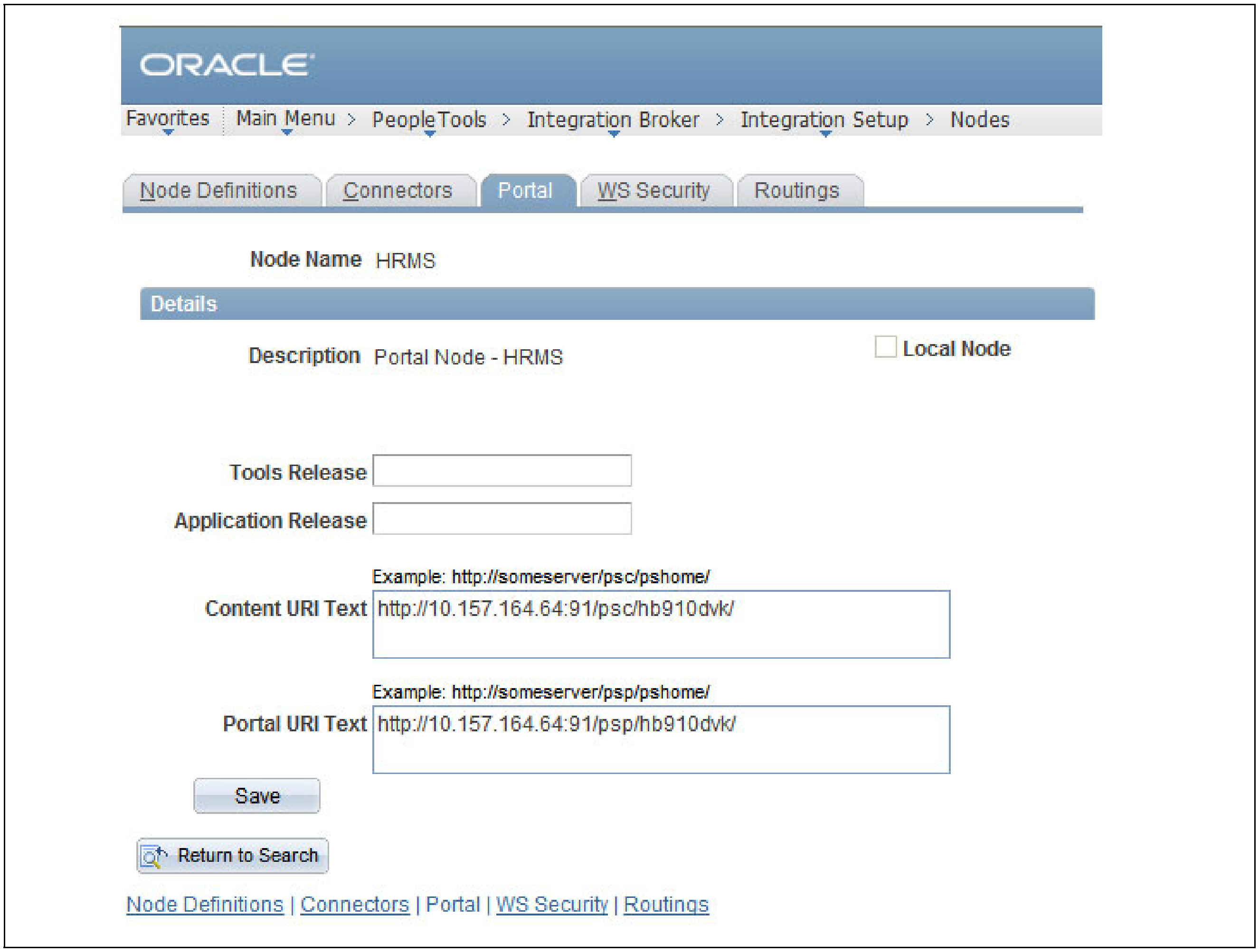
To set up Portal Node Definitions for the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *ERP*.
3. Select the Portal tab to access the Portal page for the ERP node, as shown in the following example:



Portal Node page for FSCM - ERP

4. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM environment.
5. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM environment.
6. Click Save, and then click the Return to Search button.
7. On the Nodes search page, search for and select the node name *HRMS*.
8. Select the Portal tab to access the Portal page for the HRMS node, as shown in the following example:



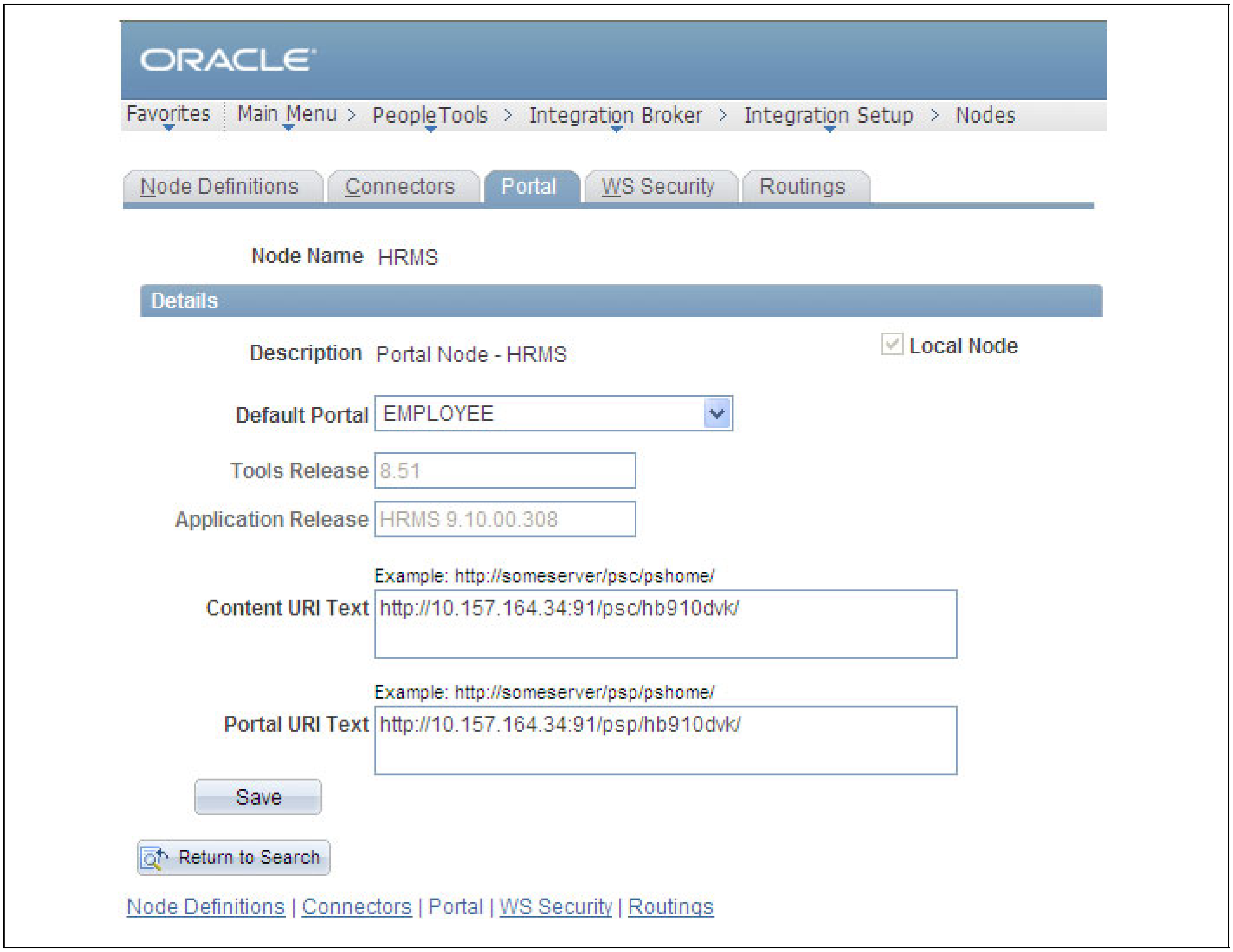
Portal Node page for FSCM - HRMS

9. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft HCM environment.
10. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft HCM environment.
11. Click Save.

Setting Up Portal Nodes in PeopleSoft HCM

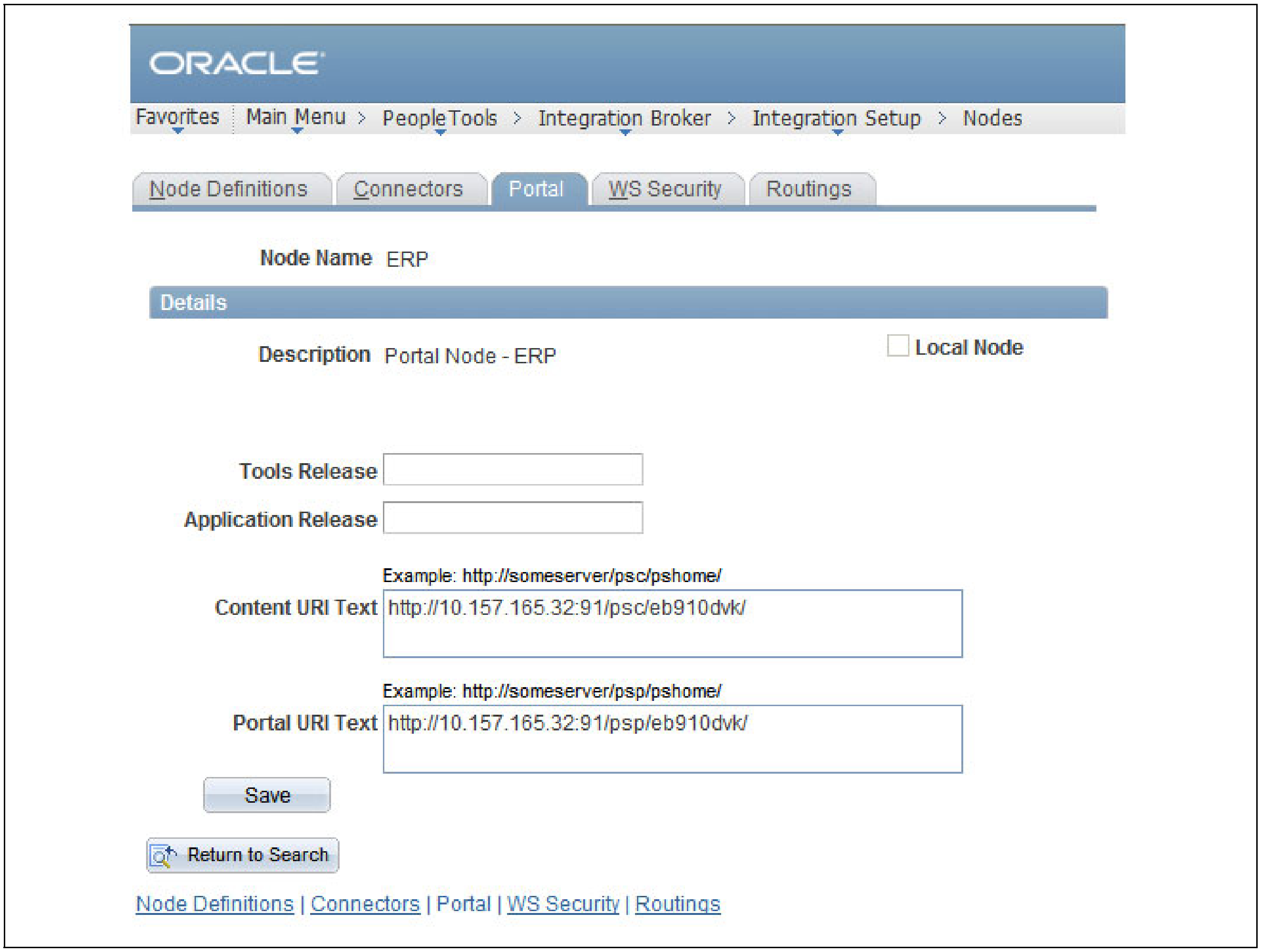
To set up Portal Node Definitions for the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select Home, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *HRMS*.
3. Select the Portal tab to access the Portal page for the HRMS node, as shown in the following example:



Portal Nodes page - for HCM

4. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft HCM environment.
5. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft HCM environment.
6. Click Save, and then click the Return to Search button.
7. On the Nodes search page, search for and select the node name *ERP*.
8. Select the Portal tab to access the Portal page for the ERP node, as shown in the following example:



Portal Nodes page - for HCM

9. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM environment.
10. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM environment.:
11. Click Save.

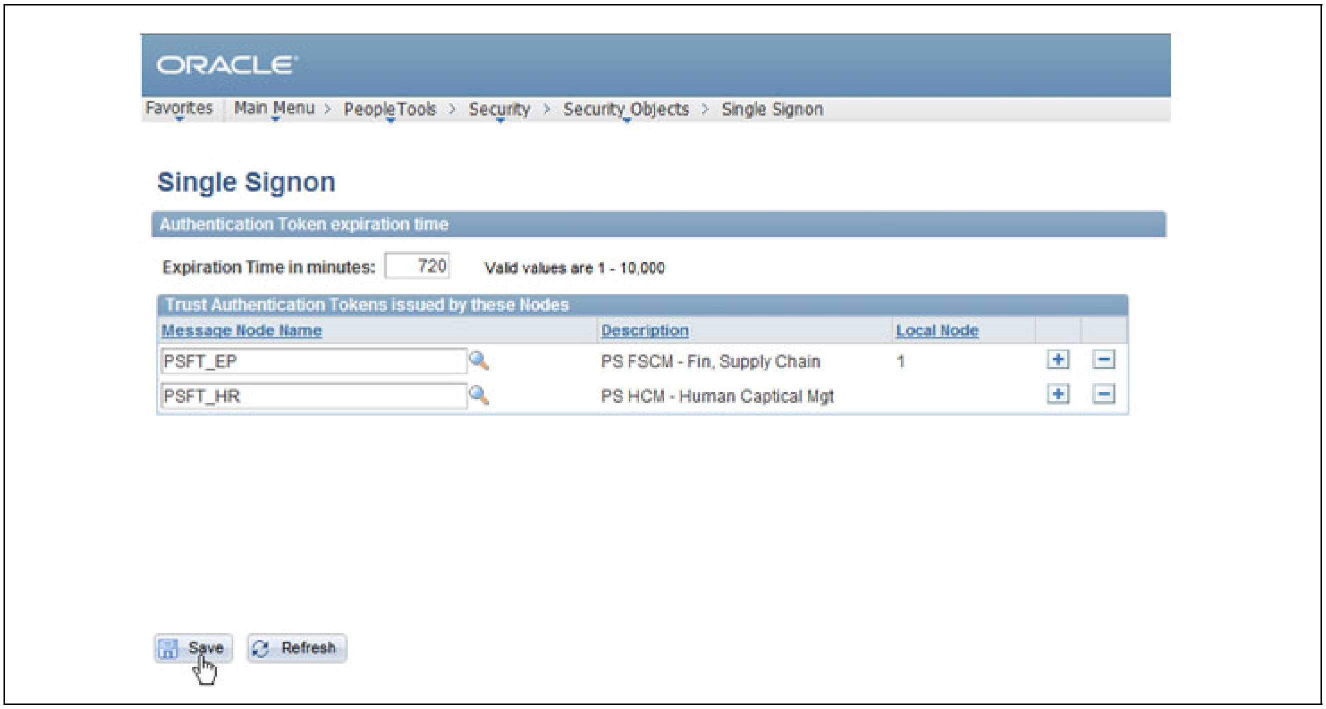
Task 9-1-3: Setting Up Single Signon

Setting Up Single Signon in PeopleSoft FSCM

To verify Single Signon in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 environment, select PeopleTools, Security, Security Objects, Single Signon.

   The Single Signon page appears, as shown in the following example:



Single Signon page

2. On the Single Signon page, in the *Trust Authentication Tokens issued by these nodes* group box, inform the message nodes PSFT_EP and PSFT_HR.
3. Click Save.

Setting Up Single Signon in PeopleSoft HCM

To verify Single Signon in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Security, Security Objects, Single Signon.

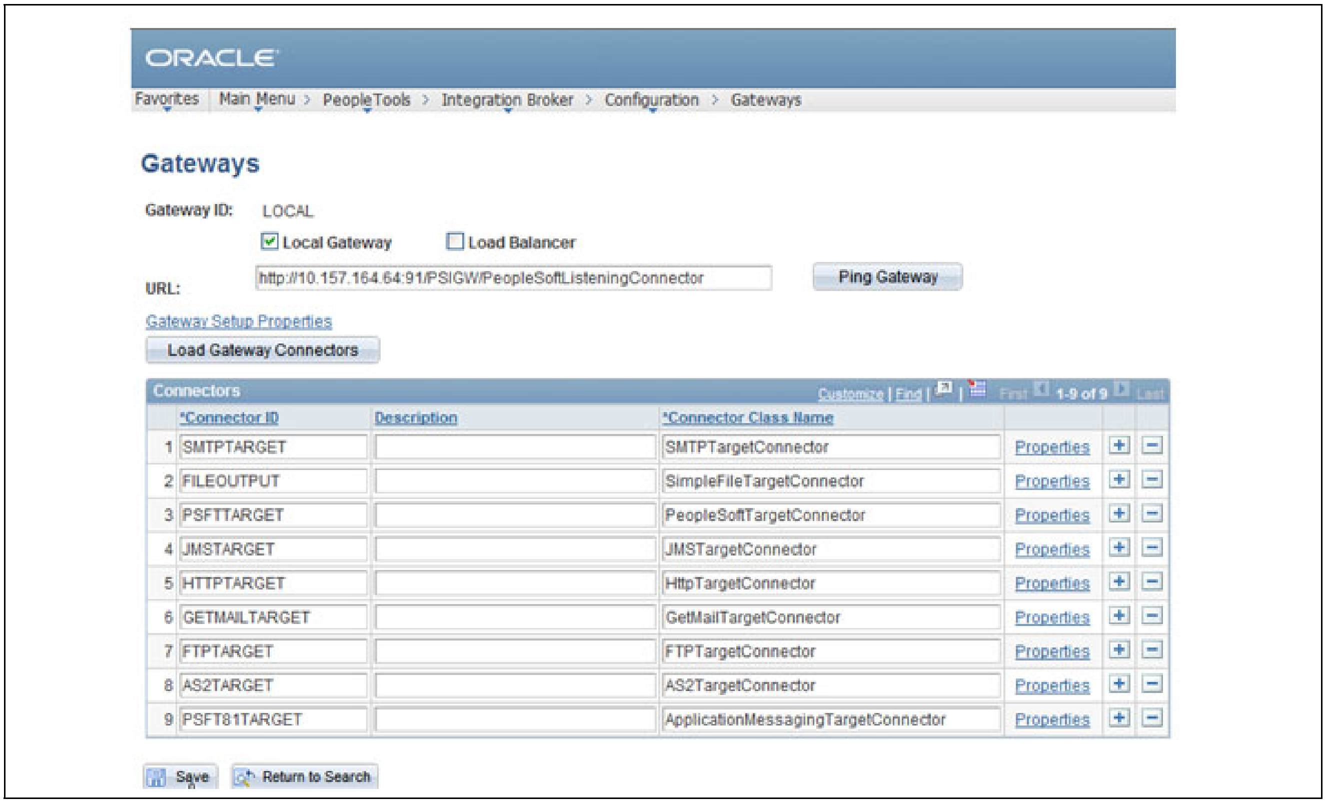
   The Single Signon page appears.
2. On the Single Signon page, in the *Trust Authentication Tokens issued by these nodes* group box, inform the message nodes PSFT_EP and PSFT_HR.
3. Click Save.

Task 9-1-4: Setting Up Integration Gateways

Setting Up Integration Gateway in PeopleSoft FSCM

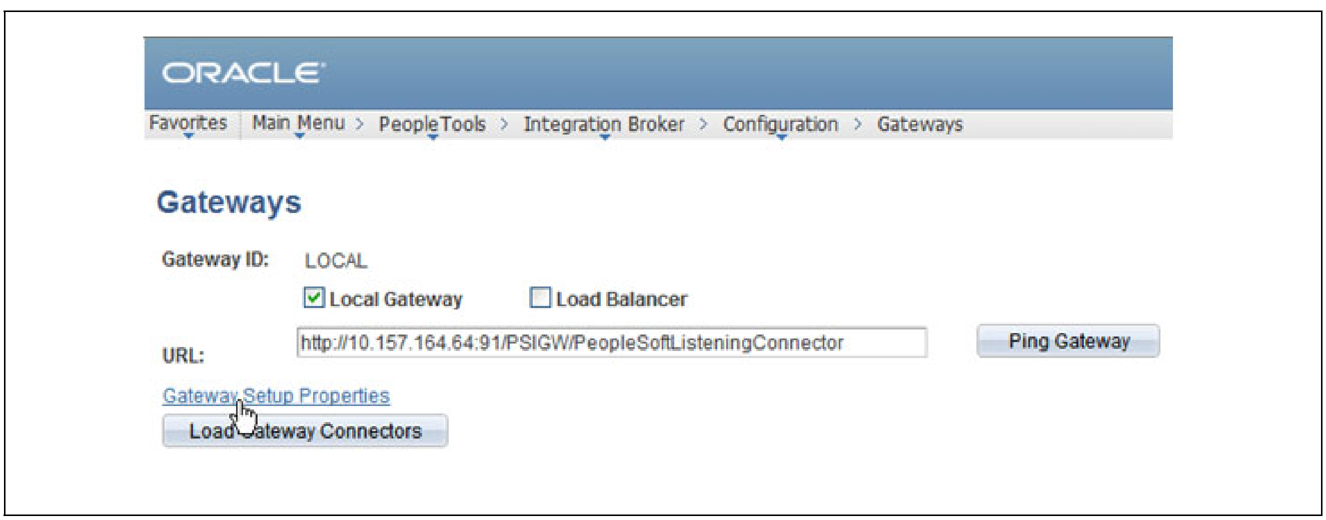
To set up Integration Gateways in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 environment, select Integration Broker, Configuration, Gateways.
2. Click Search. The Gateways page for the Local Gateway appears automatically by default, as shown in the following example:



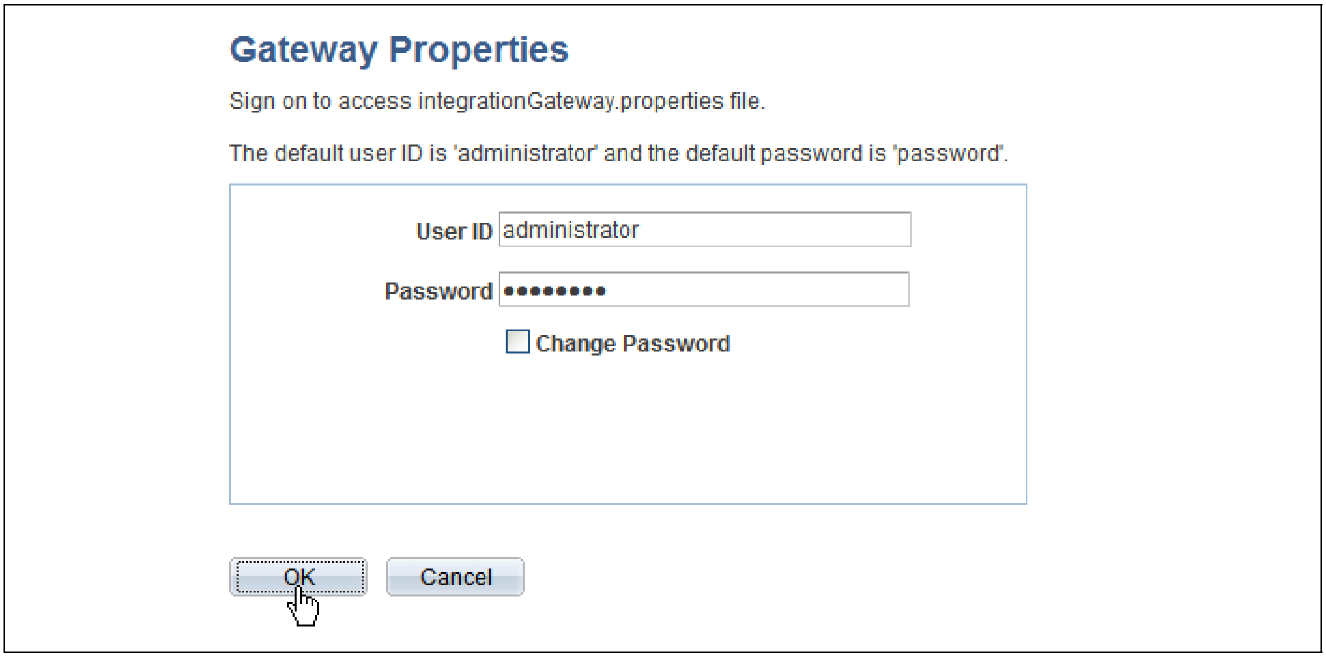
Gateways page

3. On the Gateways page, in the URL field, enter *http://<IBHostname>:<port>/PSIGW /PeopleSoftListeningConnector* for the Local Gateway URL.
4. Click the Load Gateway Connectors button.
5. Click Save.
6. Click Ping Gateway to ensure connectivity and proper configuration.
7. Click the Gateway Setup Properties link, as shown in the following example:



Gateway Setup Properties page

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



Gateway Properties Sign in page

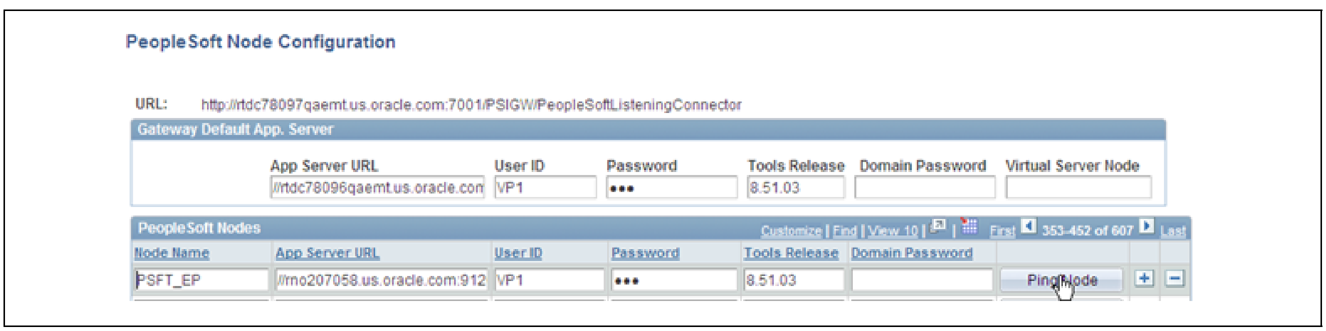
8. On the Gateway Properties page, enter the following:

Note. The user ID and password are case sensitive.

- In the User ID field, enter *administrator*.
- In the Password field, enter *password*.

9. Click OK.

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



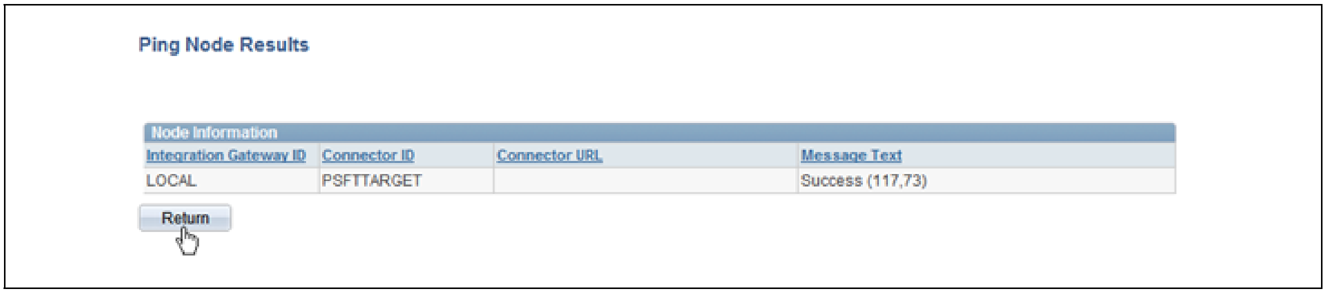
PeopleSoft Node Configuration page

10. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:

- App Server URL
- User ID
- Password
- Tools Release

11. Click the Add (+) button to add the node *PSFT_EP* (the PeopleSoft FSCM application server node).

12. In the Tools Release field, enter the PeopleSoft PeopleTools Release number that you obtained when you pinged the gateway (it must match exactly).
13. Click Save.
14. Click the Ping Node button to ping the PSFT_EP node and verify that it is responding.
15. If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results

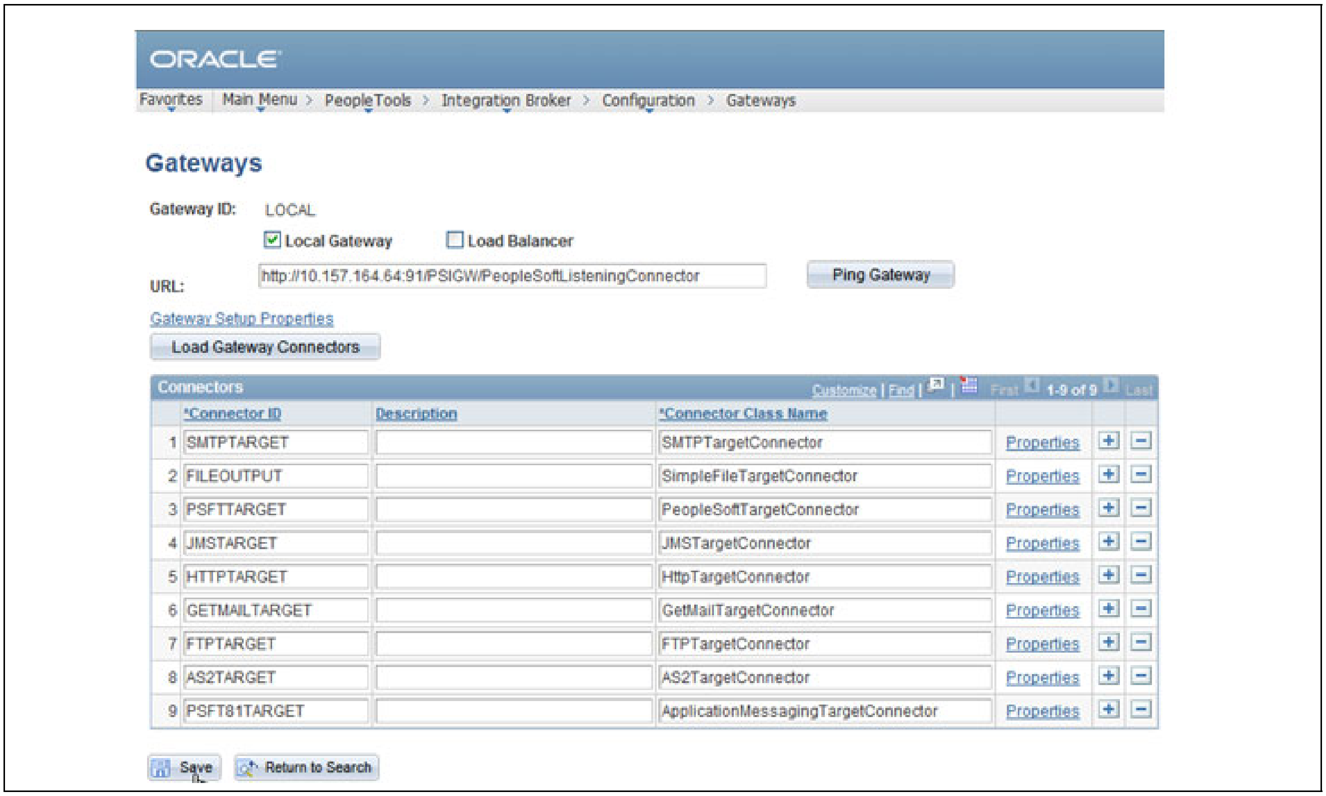
16. Click the Return button.

Setting Up Integration Gateway in PeopleSoft HCM

To set up Integration Gateway in the PeopleSoft HCM environment:

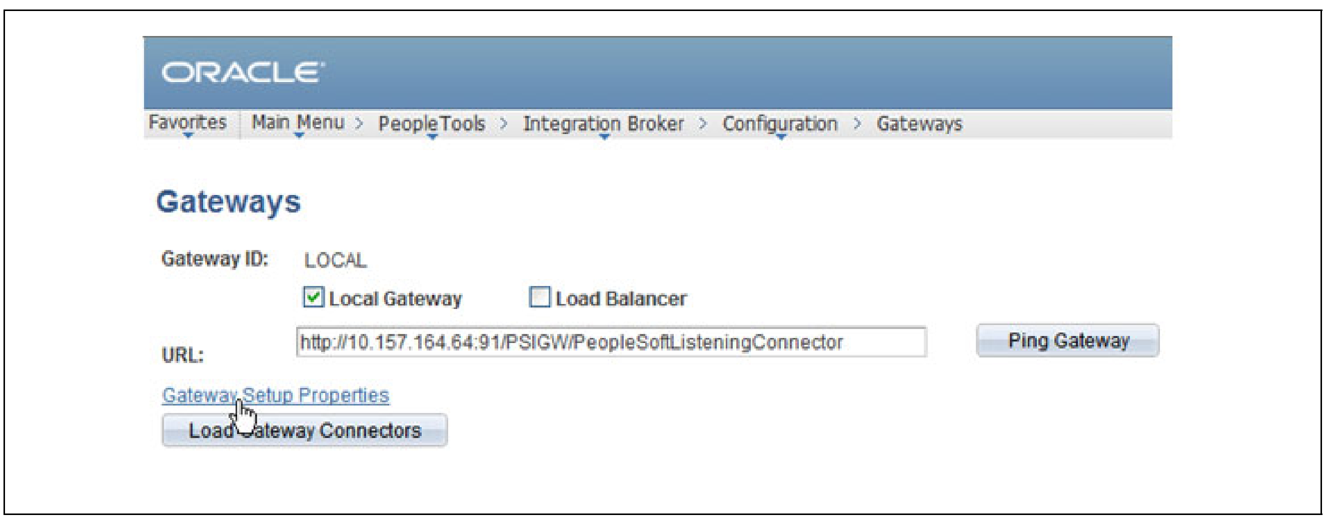
1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Configuration, Gateways.

   The Gateways search page appears.
2. Click Search. The Gateways page for the Local Gateway appears, as shown in the following example:



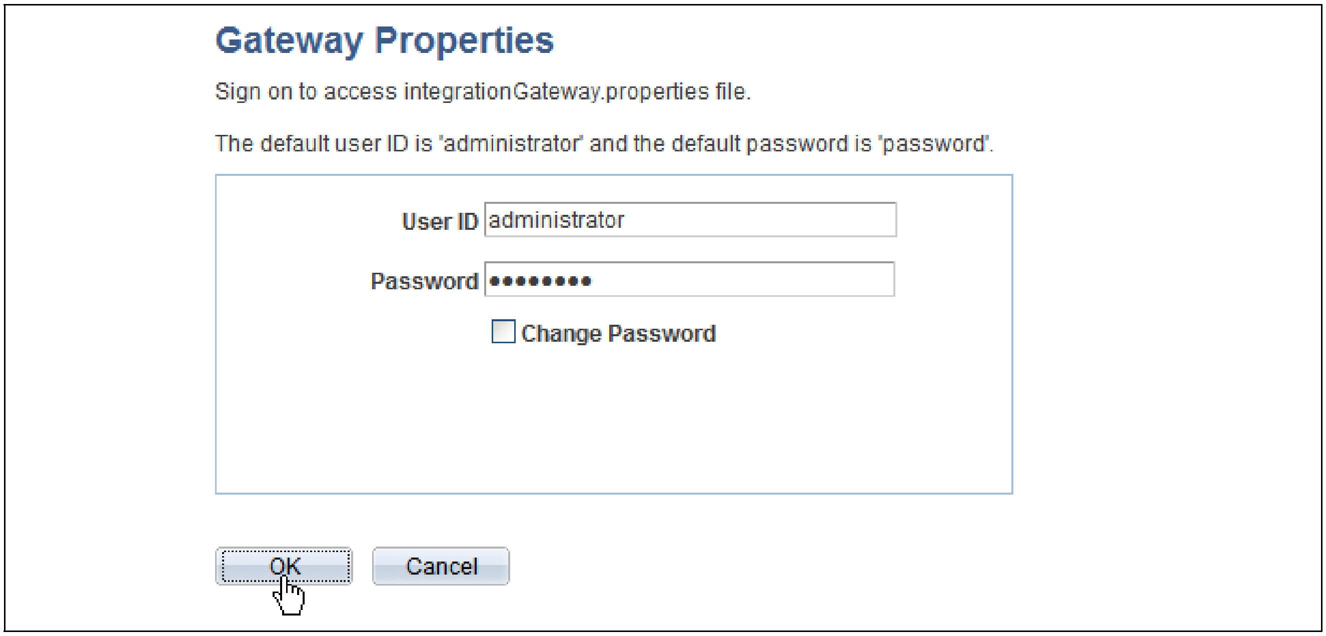
Gateways page

3. On the Gateways page, in the URL field, enter *http://<IBHostname>:<port>/PSIGW /PeopleSoftListeningConnector* for the Local Gateway.
4. Click the Load Gateway Connectors button.
5. Click Save.
6. Click Ping Gateway to ensure connectivity and proper configuration.
7. Click the Gateway Setup Properties link, as shown in the following example:



Gateways page

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



Gateway Properties page

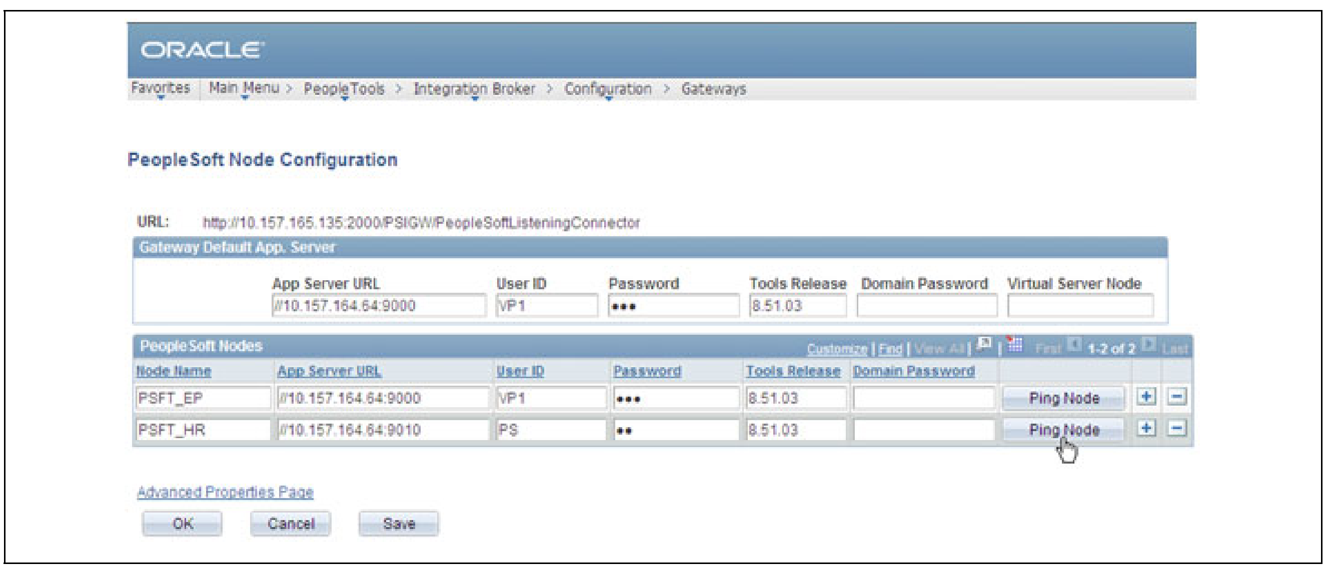
8. Enter the following on the Gateways Properties page:

Note. The User ID and password fields are case sensitive.

- Enter *adminstrator* in the User ID field.
- Enter *password* in the Password field.

9. Click OK.

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



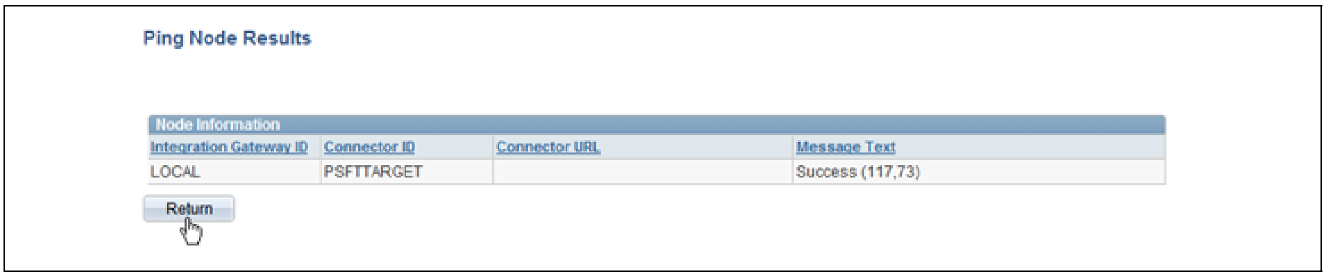
PeopleSoft Node Configuration page

10. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:

- App Server URL

- User ID
- Password
- Tools Release

11. Click the Add (+) button to add the node *PSFT_HR* (the PeopleSoft HCM application server node).
12. In the Tools Release field, enter the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway (it must match exactly).
13. Click Save.
14. Click the Ping Node button to ping the PSFT_HR node and verify that it is responding.
15. If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results page

16. Click the Return button.

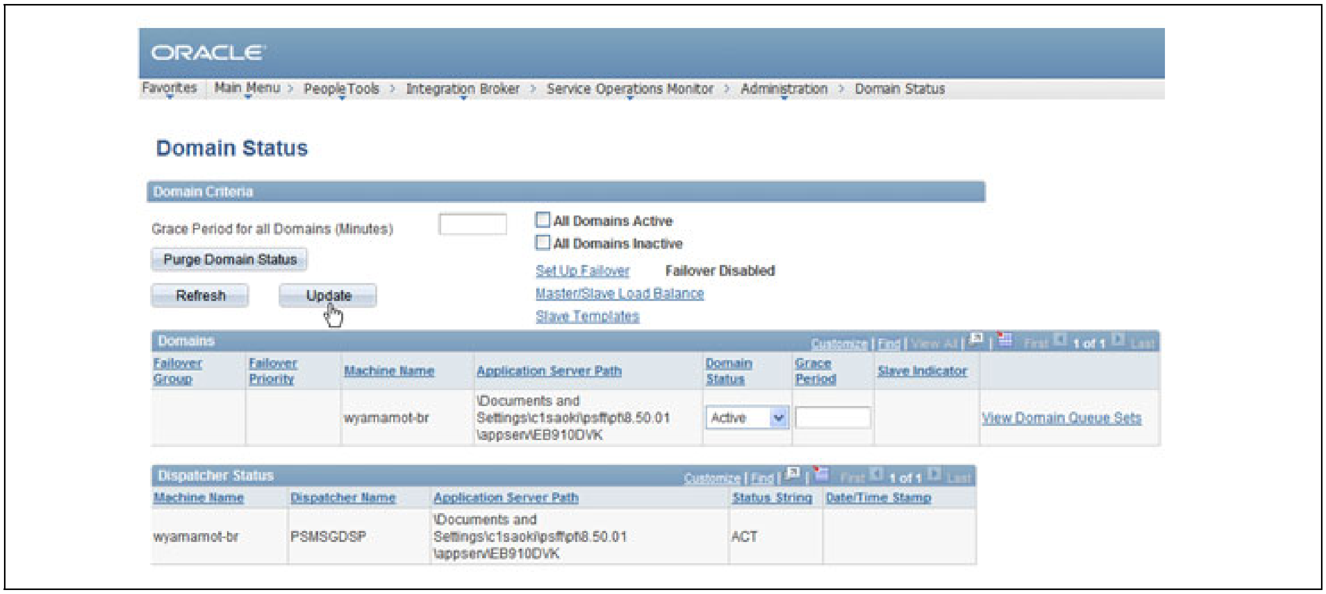
Task 9-1-5: Activating Local Domains

Activating the Local Domain in PeopleSoft FSCM

To activate the Local Domain in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM environment, select Integration Broker, Service Operations Monitor, Administration, Domain Status.

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



Domain Status page

2. On the Domain Status page, in the Domains Status field for the application server, select *Active* from the drop-down list box.

Note. If your machine name does not appear in this list, click the Purge Domain Status button and then click the Refresh button.

---

3. Click Update.

Activating the Local Domain in PeopleSoft HCM

To activate the Local Domain in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select Integration Broker, Service Operations Monitor, Administration, Domain Status.
2. On the Domain Status page, in the Domains field for the application server, select *Active* from the drop-down list box.

Note. If your machine name does not appear in this list, click the Purge Domain Status button and then click the Refresh button.

---

3. Click Update.

Task 9-1-6: Activating Queue Definitions

Understanding Queue Definitions

The following Queue Definitions must be set to *Active* for Staffing:

```
ACTION_REASON
ACTUAL_TIME
COMPETENCY
CUSTOMER
ELAPSED_TIME
```



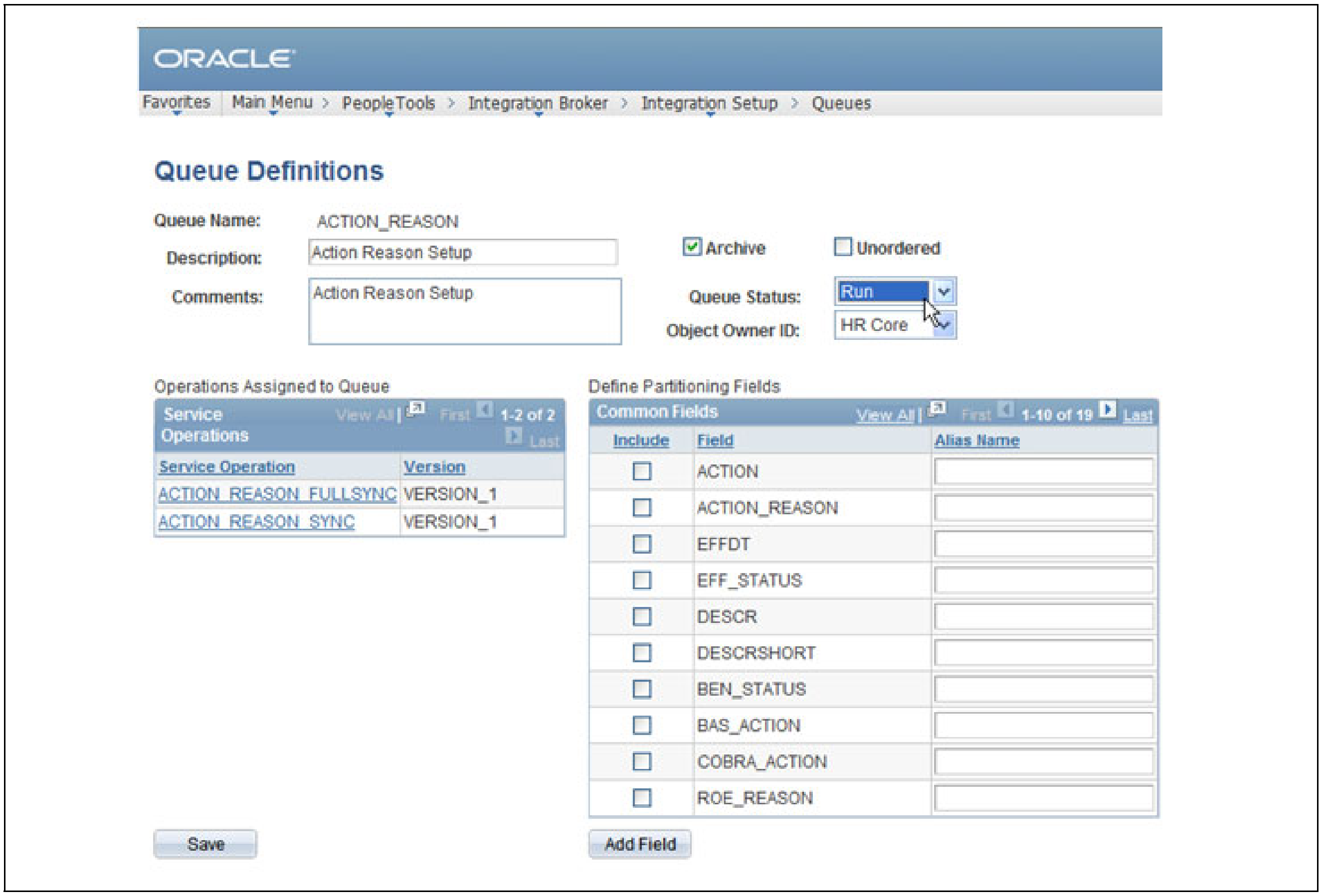
```
ENTERPRISE_SETUP
ESTIMATED_TIME
FO_APP_HIRE
FO_ASSIGNMENTS
FO_MASS_CHANGES
FO_SETUP
FO_SYNC
GL_SETUP
HR_SETUP
MARKET_RATES
MARKET_RATE_LOAD
PAYGROUP_SETUP
PERSON_DATA
PERSON_SETUP
PROJECTS_SETUP
RATING_MODEL
TIME_AND_LABOR_SETUP
```

Activating Queue Definitions in PeopleSoft FSCM

To activate Queue Definitions in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.1 environment, select Integration Broker, Integration Setup, Queues.
2. On the Queues search page, select the Find an Existing Value tab and enter a value in the Queue Name field, then click Search.

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



Queue Definitions page

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

Activating Queue Definitions in PeopleSoft HCM

To activate Queue Definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.1 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name that you want to activate.
3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.

Task 9-1-7: Setting up the Delivered Service Operations

The Service Operations described here are meant to keep tables in sync between PeopleSoft FSCM 9.1 and PeopleSoft HCM 9.1. You must make decisions about how to implement the integration. These decisions determine your tasks in activating handlers and routings. For information about implementing service operations, refer to the following:

See *PeopleSoft Enterprise Pay/Bill Management 9.1 PeopleBook,* "Using Enterprise Integration Points."

Task 9-2: Checking the Installation Table for PeopleSoft HCM and PeopleSoft FSCM

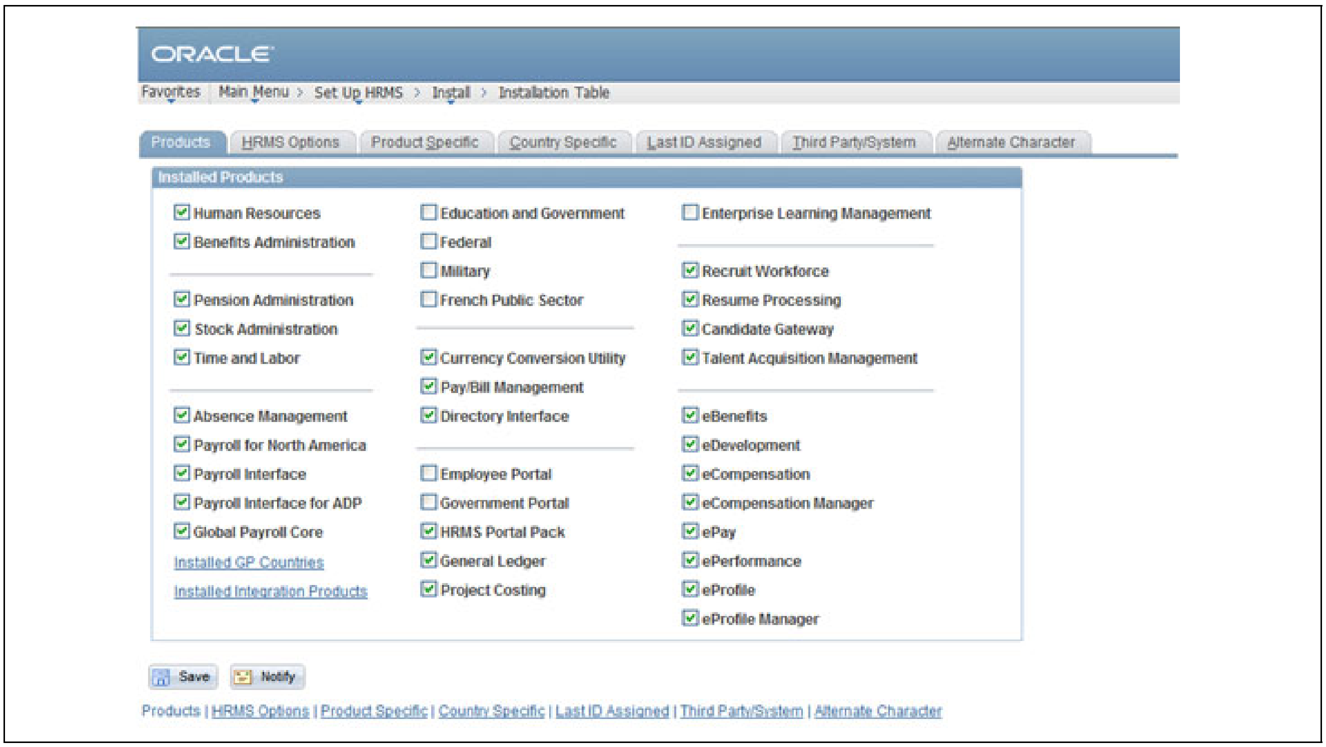
Task 9-2-1: Checking the Installation Table for PeopleSoft HCM

In this step, you select the Pay/Bill Management and Project Costing installation in the Installation Table.

To check the installation table for PeopleSoft HCM:

1. In PeopleSoft HCM, select Set Up HRMS, Install, Installation table.

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



HRMS Installation Table page

2. On the Products page, in the Installed Products group box, verify that the Pay/Bill Management check box and the Project Costing check box is selected.

   If they are not selected, select them now.

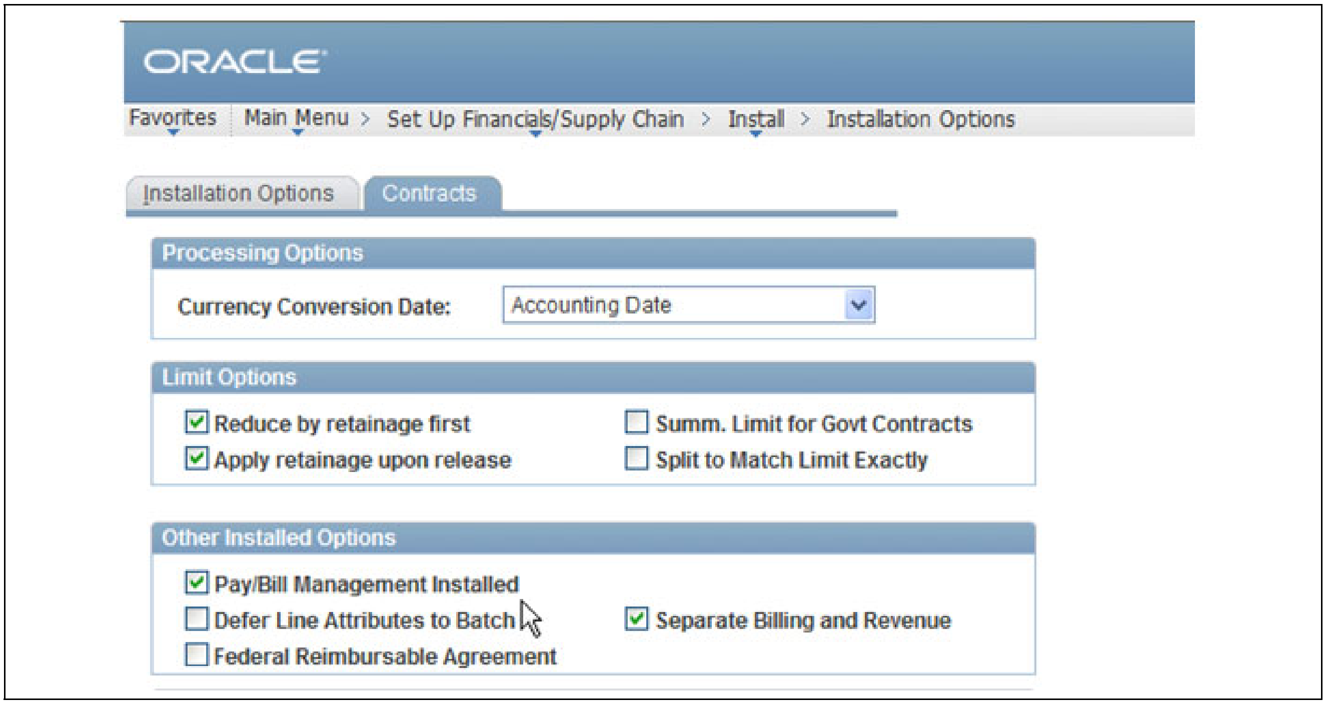
3. Click Save.

Task 9-2-2: Checking the Installation Table for PeopleSoft FSCM

In this step, you select the Pay/Bill Management for Contracts installation in the Installation table.

To check the installation table for PeopleSoft FSCM:

1. In PeopleSoft FSCM, select Set Up Financials/Supply Chain, Install, Installation Options.
2. Select the Contracts tab to access the Contracts page, as shown in the following example:



FSCM Installation Options - Contracts page

3. On the Contracts page, in the Other Installed Options group box, verify that the Pay/Bill Management Installed check box is selected.

   If it is not selected, select it now.

4. Click Save.

Chapter 10

Installing PeopleSoft 9.1 ESA and PeopleSoft FSCM Portal Packs for Brazil

This chapter discusses:

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

Task 10-1: Granting Access to Navigation Pages

To access the navigation pages, security to the Navigation Page IScripts must be granted to all users. Using PeopleSoft Data Mover, run the EOPP_ ADD_ROLE.DMS script that is 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 10-2: Granting Access to Personalize the Portal Homepage

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 PeopleSoft Data Mover to run the PORTAL_HP_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL_ADD_ROLE.DMS script.

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 you run 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 10-3: Enabling Pagelet Creation and Access with Portal Utilities

To enable the creation and viewing of pagelets using Enterprise Components Portal Utilities, you can use PeopleSoft Data Mover to run the EOPP_PORTAL_PACK.DMS script located in <PS_HOME>\scripts.

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

CHAPTER 11

Integrating PeopleSoft Enterprise 9.1 Project Costing and Program Management for Brazil with Microsoft Project 2007

This chapter discusses:

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

Understanding the PeopleSoft-Microsoft Project Integration for Brazil

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

Note. PeopleSoft-Microsoft Project Integrator must be installed on a machine configured with Microsoft Project 2007. It is important that you do not use this machine for any other purpose. The Integrator supports Windows Terminal Server, which means that one machine may be used to run multiple Integrators.

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

To install the project integrator:

1. Create a directory, <*MSP_HOME*>, for the MSP Integrator on the Microsoft 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 <MSP_HOME> directory.
3. To register any missing ActiveX controls in the Microsoft Windows machine that is dedicated as the Microsoft Project Integrator, check the Microsoft Windows system installation directory (<WINDOWS_INST>), for example C:\WINNT\SYSTEM32 or C:\WINDOWS\SYSTEM32, for the following OCX files:

   - Richtx32.ocx

- TABCTL32.OCX
- MSINET.OCX

4. If any of these files are missing, do the following:
   a. Copy the three files from <PS_HOME>/src/vb/msp to <WINDOWS_INST>.
   b. Copy the file regmsp.bat from <PS_HOME>/src/vb/msp to <WINDOWS_INST>.
   c. Run <WINDOWS_INST>\regmsp.bat to register the OCXs.

   For example:

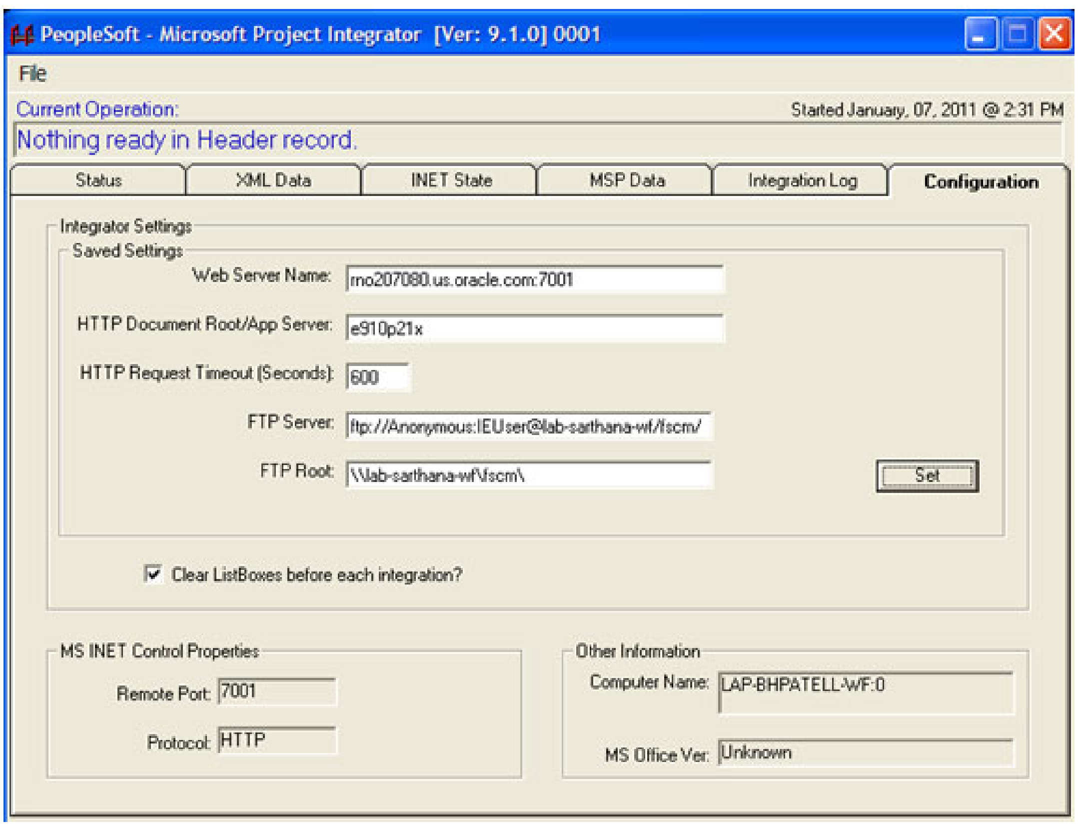
```
C:\WINNT\system32\regmsp.bat.
```

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

After the Microsoft Project Integrator is running, you must configure it for your environment.

To configure the Microsoft Project Integrator for your environment:

1. Launch <MSP_HOME>\PC_MSP2.EXE to start the Microsoft Project Integrator application.
2. Select the Configuration tab to access the Configuration page, as shown in the following example:



PeopleSoft-Microsoft Project Integrator - Configuration page

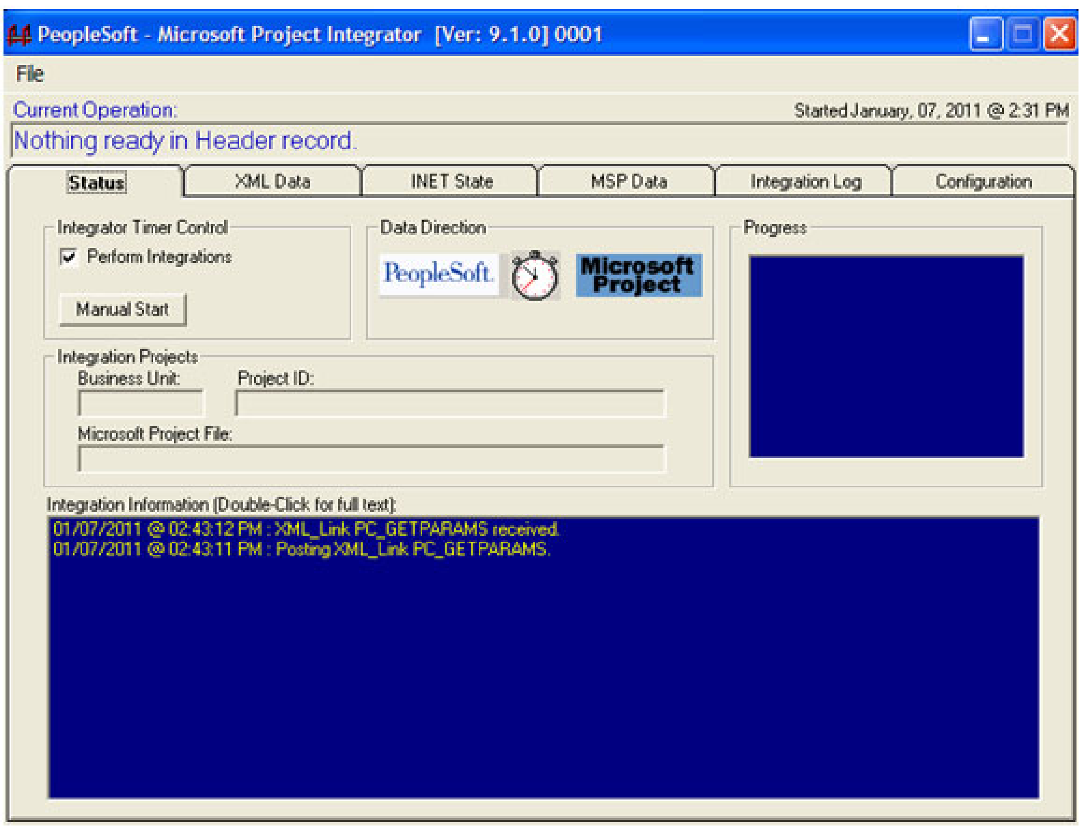
3. On the Configuration page, enter the following values:
   - In the Web Server Name field, enter the name of the web server.
   - In the HTTP Document Root/App Server field, enter the Application Server name.

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

     For example: http://rno207080.us.oracle.com:7001/psp/e910p21x/?cmd=login

     In the preceding example, *rno207080.us.oracle.com:7001* is entered as the Web Server Name and *e910p21x* is entered as the HTTP Document Root/App Server.
   - In the FTP Server field, enter the FTP server that this integrator uses to direct the application aerver to send the .mpp files to integrate.
   - In the FTP Root field, enter the Microsoft Windows file path to the root location of the FTP server.

     This is the file path that the Microsoft Project uses to find the .mpp files to integrate.
4. You can verify that the Microsoft Project Integrator is running successfully when you see a similar message in the Integration Information section of the Status page, as shown in the following example:



Microsoft Project Integrator - Status page: Integration Information message

Example of Integration Information message when working properly:

```
01/07/2011@02:43:12PM:XML_Link PC_GETPARAMS received.
01/07/2011@02:43:11PM:PostingXML_Link PC_GETPARAMS.
```

The first time that you run the integrator, if you receive the following error on the XML Data page :

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

Do the following:

1. Open a browser and run the following URL:

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

   For example:http://rno207080.us.oracle.com:7001/xmllink/e910p21x/

2. Run the integrator again.

To launch the project integrator upon start up, create a shortcut to PC_MSP2.EXE in the server's Startup folder to ensure it initiates upon start up.

CHAPTER 12

Defining an FTP Server for File Attachments in PeopleSoft Enterprise 9.1 Project Costing for Brazil

This chapter discusses:

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

Understanding File Attachment Storage for Brazil

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

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

To store file attachments on the database:

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

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

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

To store file attachments on a file server:

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

2. Select PeopleTools, Utilities, Administration, URLs.
3. On the URLs search page, search for and select the URL identifier *PC_PROJECTS_DOC_ATTACHMENT*.

   Note. PeopleSoft Project Costing delivers this URL.

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

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

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

   - In the User ID field, enter the user ID of the user account under which all users connect to the FTP server for adding, updating, viewing, and deleting documents.
   - In the Password field, enter the password that is associated with the user account under which all users connect to the FTP server.
   - In the Machine Name field, enter the machine name by which 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.
5. Click Save.
6. On the Installation Options - Project Costing page, in the File Attachment Option group box, select the File Server option and enter the home directory where the attachment files are stored.
7. Click Save.

For more information on the URL Maintenance page:

See *PeopleSoft Enterprise PeopleTools 8.51 PeopleBook: System and Server Administration,* "Using PeopleTools Utilities."

For more information on the Installation Options - Project Costing page:

See *PeopleSoft Enterprise 9.1 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook,* "Setting Installation Options for PeopleSoft Applications."

CHAPTER 13

Setting Up PeopleSoft Enterprise 9.1 Staffing Front Office for Brazil

This chapter discusses:

- Setting Up Document Attachments
- Setting Up the Verity Search Engine (Optional)

Task 13-1: Setting Up Document Attachments

In PeopleSoft Staffing Front Office 9.1, Oracle uses the standard file attachments functionality. This functionality is used in many components by multiple PeopleSoft products.

Note. PeopleSoft Staffing Front Office is only supported on Microsoft SQL Server, Oracle and DB2 UDB for Linux, UNIX, and Microsoft Windows.

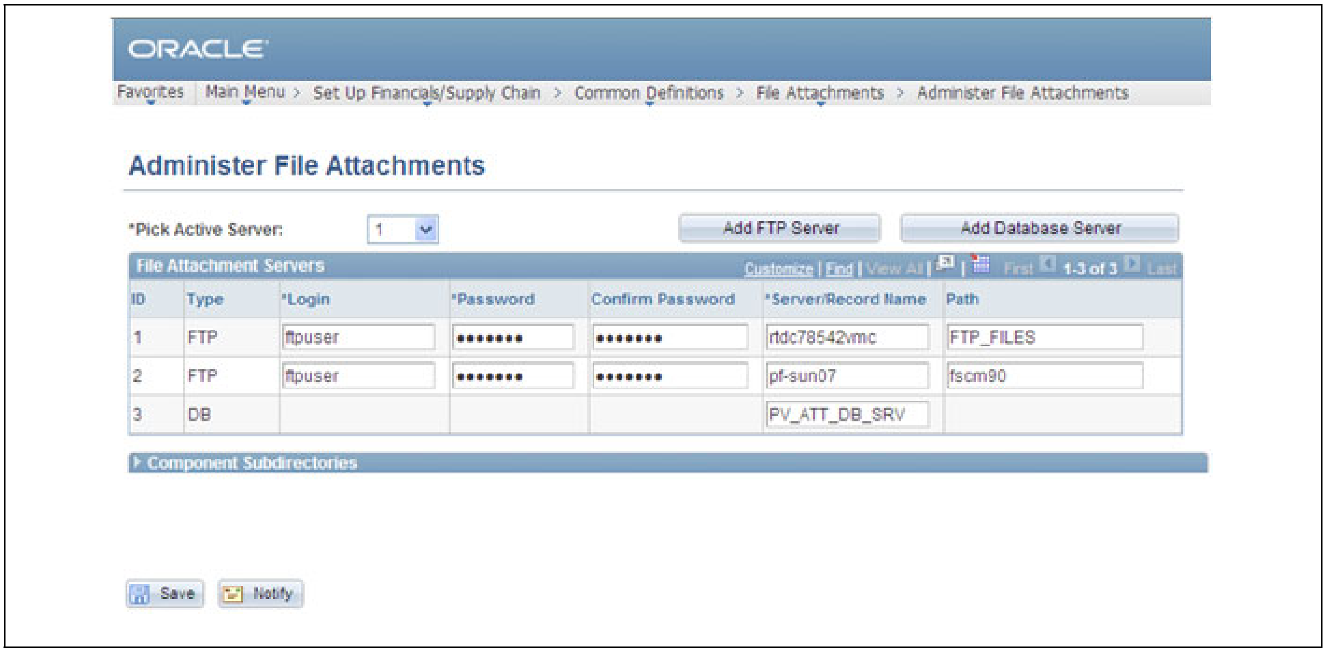
If you are planning to use file attachments for Applicants, Employees, Orders, Assignments, Customers, or Contacts, then you need to set up an FTP server.

Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments to access the correct page.

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.

Use the following example and list of fields on the Administer File Attachments page to configure the FTP server:



Administer File Attachments page

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

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

- Click the Add FTP Server button (add file transfer protocol server) to insert a new row in the grid to define a new FTP server for attachments.
- The Add Database Server button is *not* applicable for PeopleSoft Staffing Front Office attachments.
- The ID field 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 the attachment from the original server, based on the server ID.

- The Type Field identifies the type of server, based on whether you click the Add FTP Server button or the Add Database Server button.

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

  The server type values are:

  - FTP (file transfer protocol server)

  Note. Only the FTP server is supported for PeopleSoft Staffing Front Office attachments.

  - DB (database server)

- In the Login field, enter or change the login name. This is required for FTP servers only.
- In the Password field, enter or change the password corresponding to the Login Name. The password is required for FTP servers only.
- In the Server/Record Name field, enter the machine name for the FTP server.

  After 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 may already be stored on those servers.

- In the Path field, enter the subdirectory path under the server's FTP root where all attachments are to be stored. This is required for FTP servers only.
- The Component Subdirectories group box and fields are *not* applicable for PeopleSoft Staffing Front Office attachments.

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

Task 13-2: Setting Up the Verity Search Engine (Optional)

PeopleSoft Staffing Front Office 9.1 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 9.1, set up your Search Configuration by selecting:

Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration.

See *PeopleSoft Enterprise Resource Management 9.1 PeopleBook,* "Enabling Resource Matching and Cache Processes."

CHAPTER 14

Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management for Brazil

This chapter discusses:

- Understanding PeopleSoft Transaction Billing Processor and PeopleSoft CRM Integration for Brazil
- Turning On and Activating the Integration Queues
- Turning On and Activating the Integration Services and Routings
- Transforming the Contract Transaction Service

Understanding PeopleSoft Transaction Billing Processor and PeopleSoft CRM Integration for Brazil

The following instructions detail the process for integrating PeopleSoft 9.1 Transaction Billing Processor (TBP) for Brazil with PeopleSoft Enterprise 9.1 Customer Relationship Management (CRM) for Brazil database. PeopleSoft TBP functionality is also used by PeopleSoft Enterprise Real Estate Management (REM), however, being in the same database does not require any additional setup.

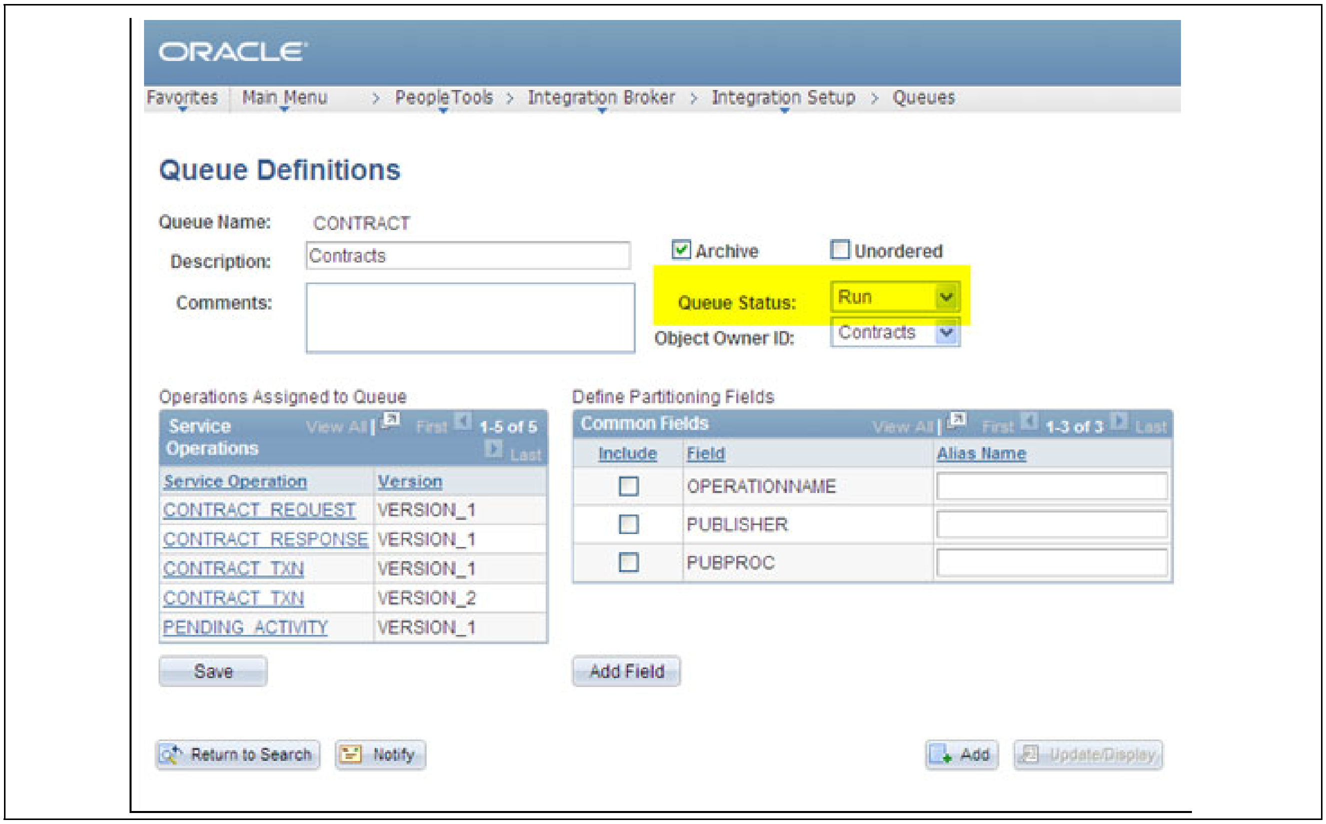
Perform the following tasks only if you want to integrate your PeopleSoft FSCM and PeopleSoft CRM databases.

Task 14-1: Turning On and Activating the Integration Queues

To turn on the integration queues (channels):

1. Sign in to the PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.
3. On the Queues search page, search for and select the queue name *CONTRACT*.

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



Queue Definitions page

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

Task 14-2: Turning On and Activating the Integration Services and Routings

There are four services that you must activate:

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

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

However, Sender and Receiver nodes are editable *only* when the new routing is being created. After the routings are 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 that follow, CONTRACT_REQUEST is one instance and CONTRACT_REQUEST1 is another instance.

Since the PeopleSoft-delivered routings have already been created and the nodes are not editable, the following lists and then briefly describes the three methods that you can use to configure your nodes:

- 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 that follow) and then supply the proper Sender and Receiver nodes (which is a 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 that follow. If you use one of the other methods, verify that the correct routings are active by selecting PeopleTools, Integration Broker, Integration Setup, Services. Open each service operation and select the Routings tab to verify their status.

- Delete the PeopleSoft system-supplied routing (CONTRACT_REQUEST) and then create a new instance of the service operation.

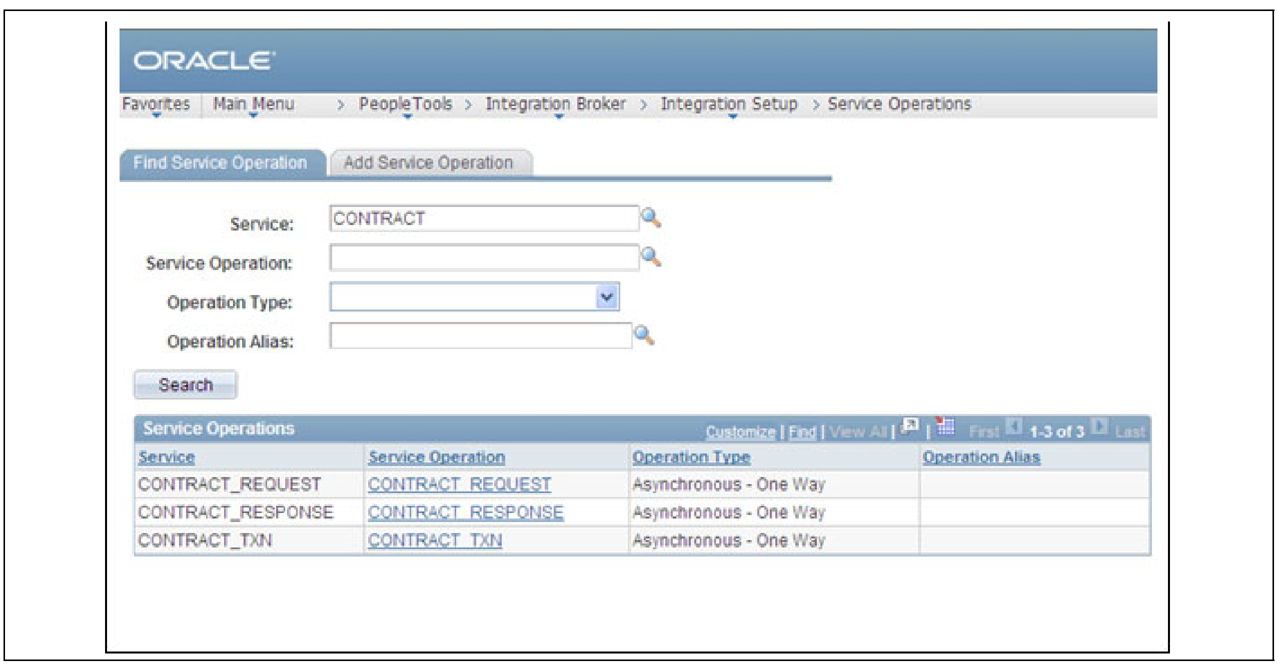
To activate the integration services (messages):

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Services.
3. In the search criteria, enter the service name *CONTRACT_REQUEST* and click Search.
4. Do one of the following to open and activate the service operation:

   a. Directly open the service operation.

      Select PeopleTools, Integration Broker, Integration Setup, Service Operations and search for *CONTRACT_REQUEST*.

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

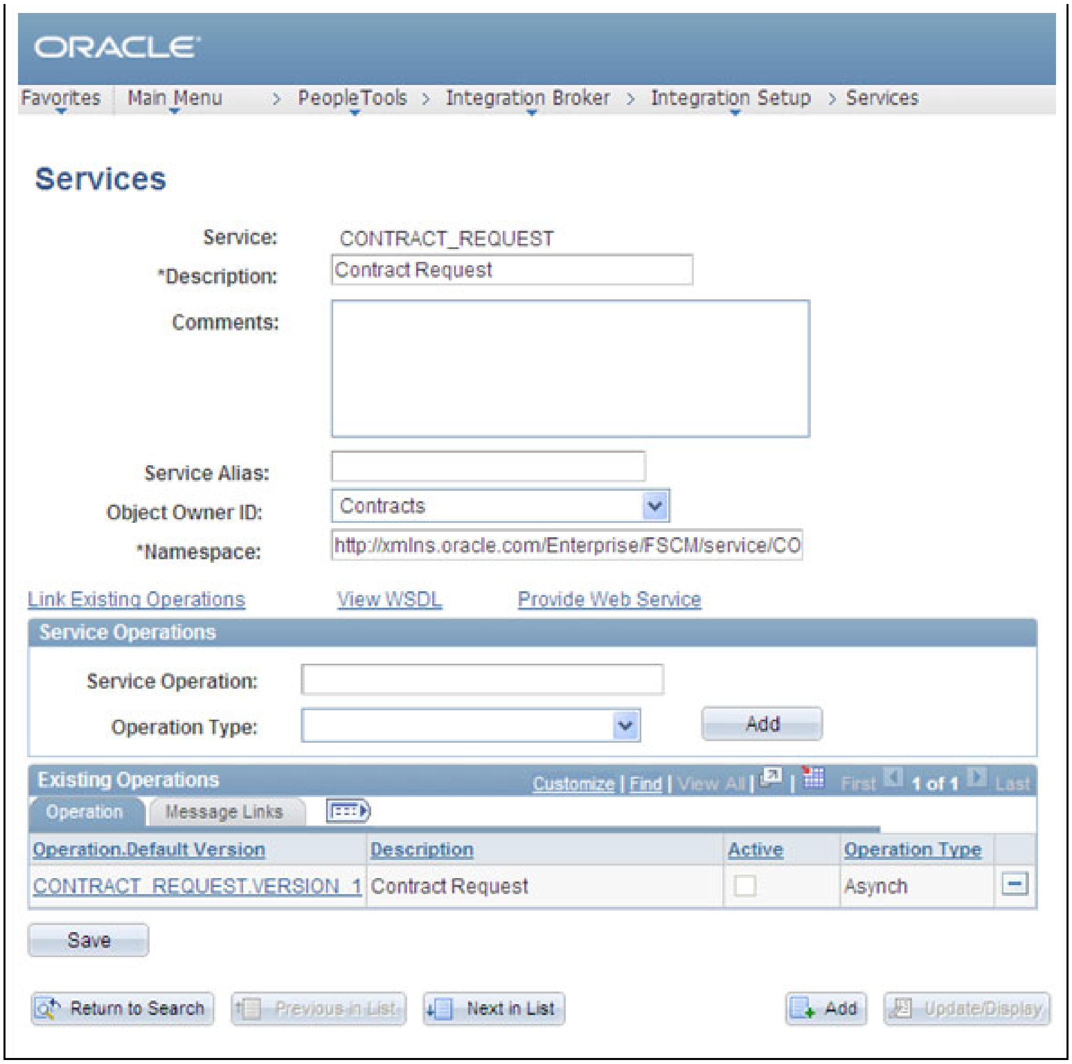


Find Service Operation page

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

Each service has a corresponding PeopleSoft-delivered service operation. For each of the service operations listed, you can open the service that has the same name.

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

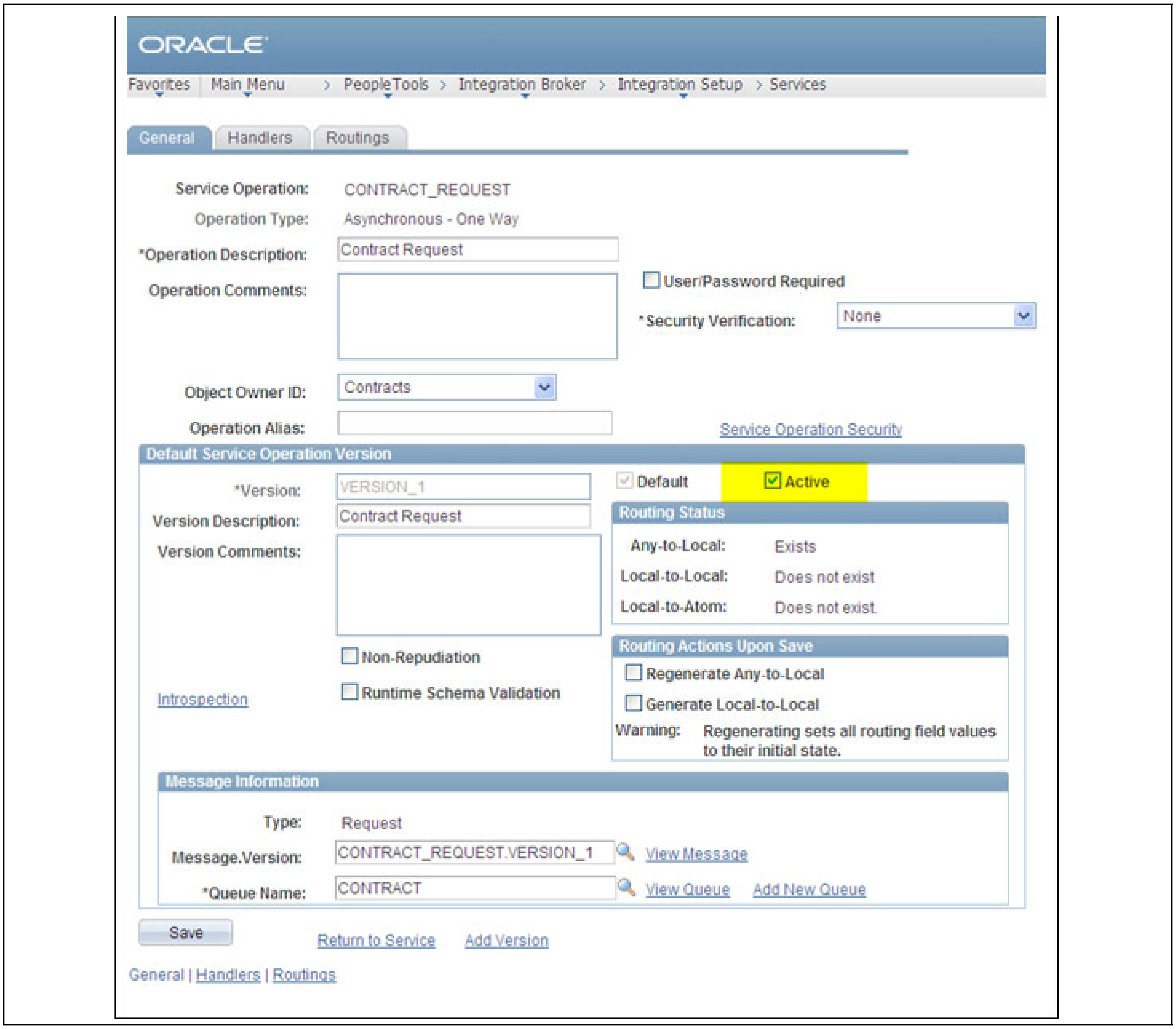


Services - Contract Request page

Select the CONTRACT_REQUEST.VERSION_1 link in the Operation tab of the Existing Operations grid that lists the Default Version. This link opens the service operation.

After a service operation has been opened by either of these two methods, you can activate and configure the same.

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

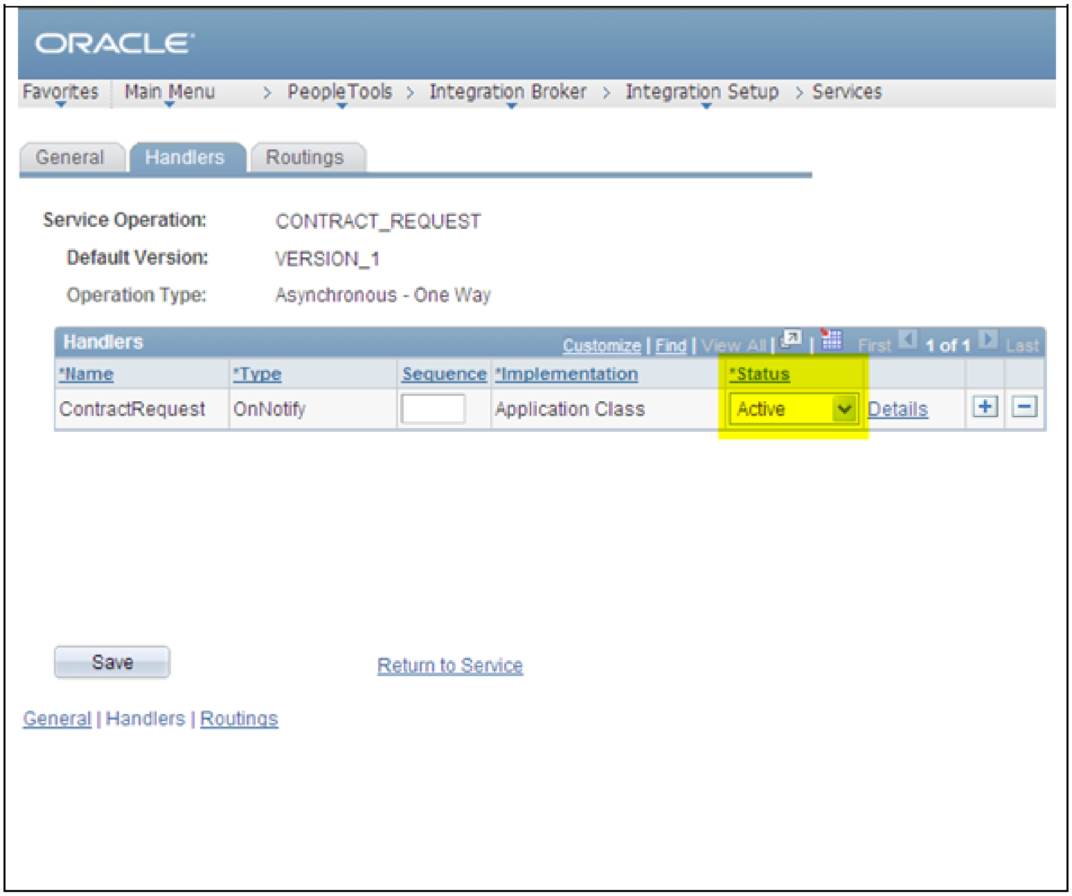


Contract Request page - General tab

6. Click Save.
7. Select the Handlers tab to access the Handlers page.
8. On the Handlers page, if there are any handlers, in the Status field drop-down list box select *Active*.

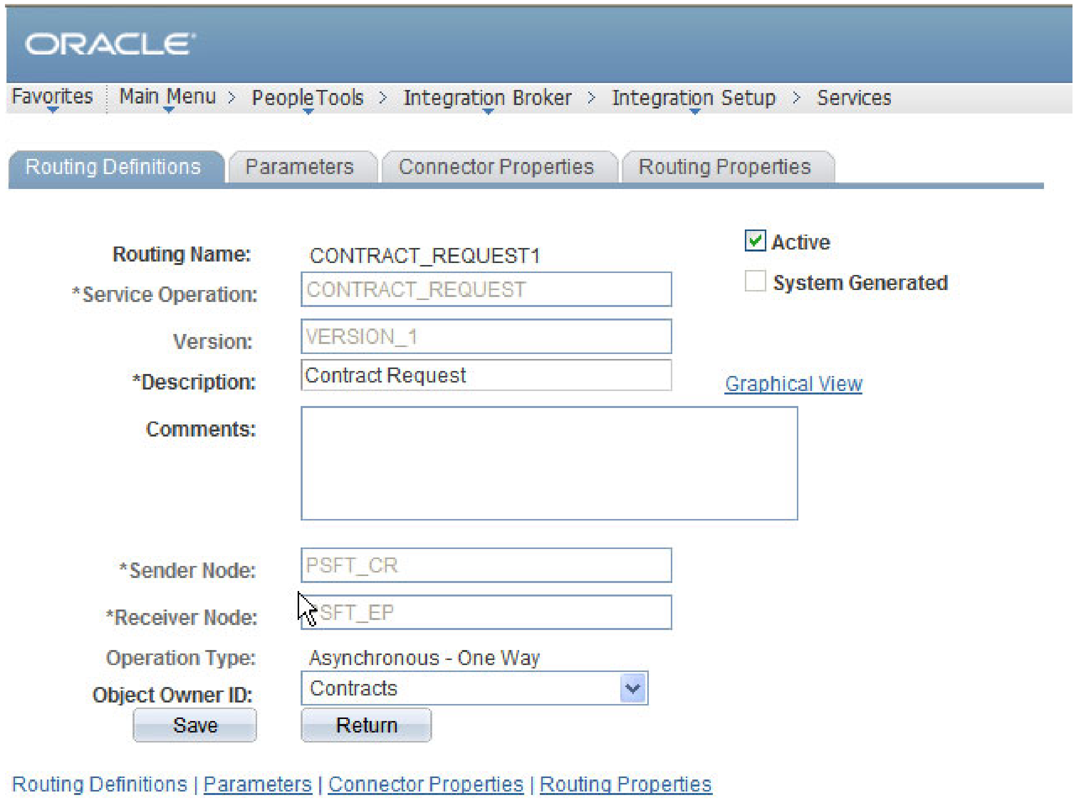
   In the example that follows, the status has been set to *Active* for the Handler Name *ContractRequest*.

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



Contract Request page - Handlers tab

9. Select the Routings tab to access the Routings page.
10. On the Routings page, in the Routing Name field, enter a value such as *CONTRACT_REQUEST1*, and then click the Add (+) button to add the routing.
11. Review the following example and prerequisite details *before* you configure the new routing definition in the steps that follow:



Routing Definitions page

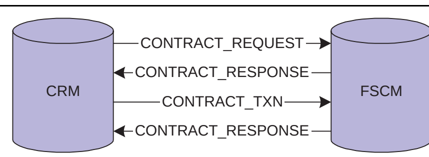
As a prerequisite, you must know which databases are being integrated. In the example of CONTRACT_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT_RESPONSE, the receiver node is the PeopleSoft CRM database.

The service operations (messages) flow as follows:

PeopleSoft CRM sends CONTRACT_REQUEST to PeopleSoft FSCM.

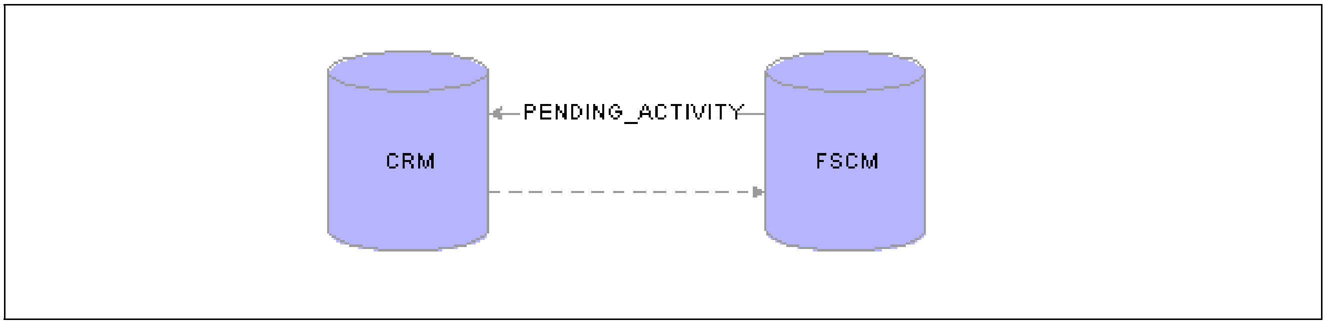
PeopleSoft FSCM sends CONTRACT_RESPONSE to PeopleSoft CRM. For Recurring and One-Time transactions this message is sent only once. For On-Demand Transactions, the system sends this message for a second time once the Contracts Billing Interface (CA_BI_INTFC) process is complete to provide the status of the transactions to PeopleSoft CRM.

PeopleSoft CRM sends CONTRACT_TXN to PeopleSoft FSCM, as shown in the following diagram:



Database integration

The PENDING_ACTIVITY service operation is sent from PeopleSoft FSCM to PeopleSoft CRM, as shown in the following diagram, where the system is configured for synchronous messages. The message identifies whether any pending activities exist for a contract Revenue Plan or Billing Plan. The message is triggered when the status of a Billing Plan or Revenue Plan is changed to complete.



Pending Activity

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.

12. Use the preceding example and prerequisite details to configure the new routing definition as follows:
    a. Select the Active check box.
    b. In the Sender Node field, enter the correct sender node.
    c. In the Receiver Node field, enter the correct receiver node.
    d. In the Object Owner ID field, enter the correct object owner ID if applicable.

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

    e. Click Save.
13. Repeat the preceding steps for the following service operations (messages):
    - CONTRACT_RESPONSE
    - CONTRACT_TXN (VERSION_2)
    - PENDING_ACTIVITY

Task 14-3: Transforming the Contract Transaction Service

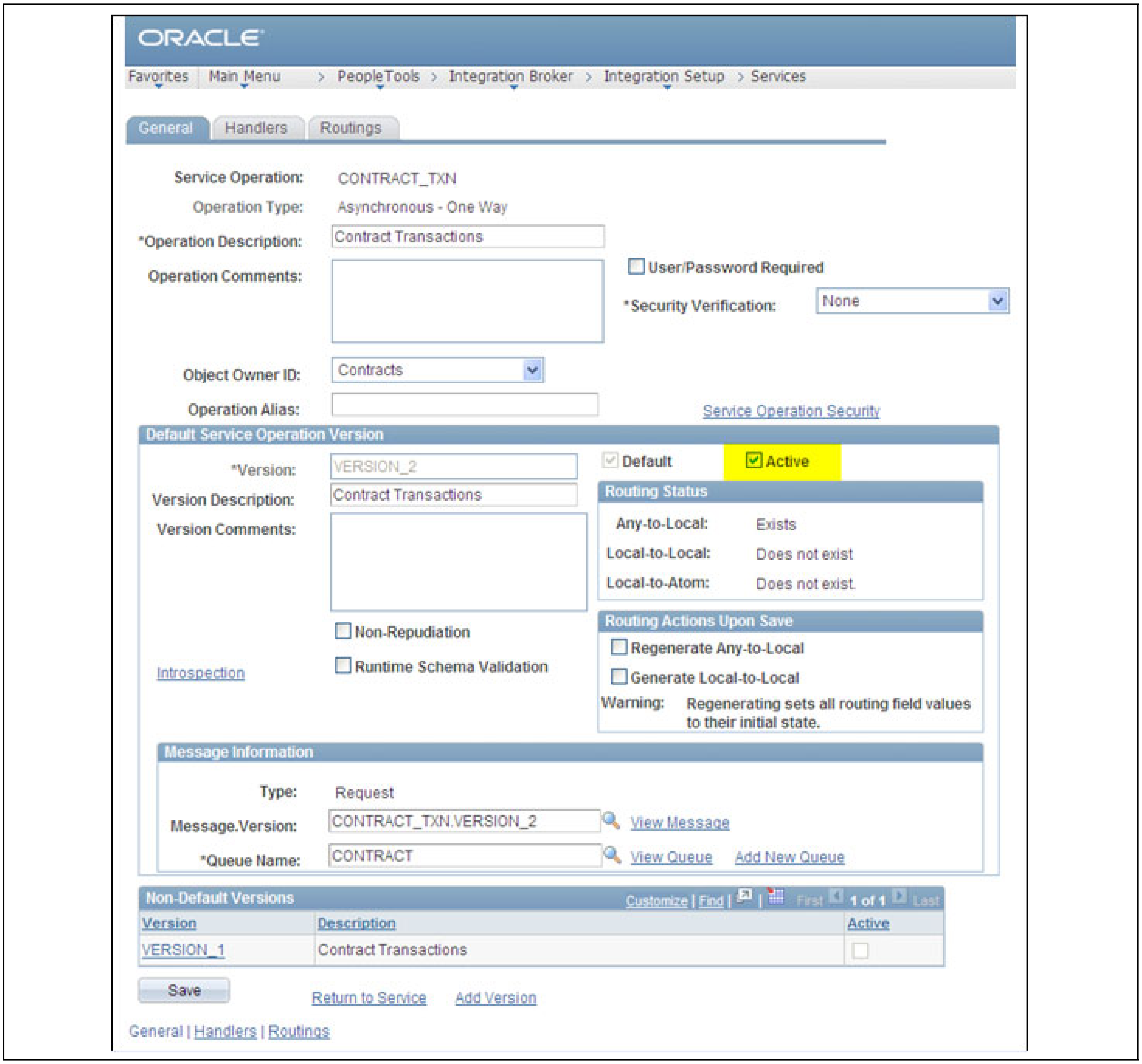
PeopleSoft Enterprise Contracts in PeopleSoft FSCM uses CONTRACT_TXN version 2 for all the processing related to PeopleSoft Transaction Billing Processor. PeopleSoft CRM uses CONTRACT_TXN version 1. The default version is version 1 in PeopleSoft CRM whereas it is version 2 in PeopleSoft FSCM. Due to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

You need to open the CONTRACT_TXN Service Operation (Message) properties and activate the non-default version 1 of the message (you 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:

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

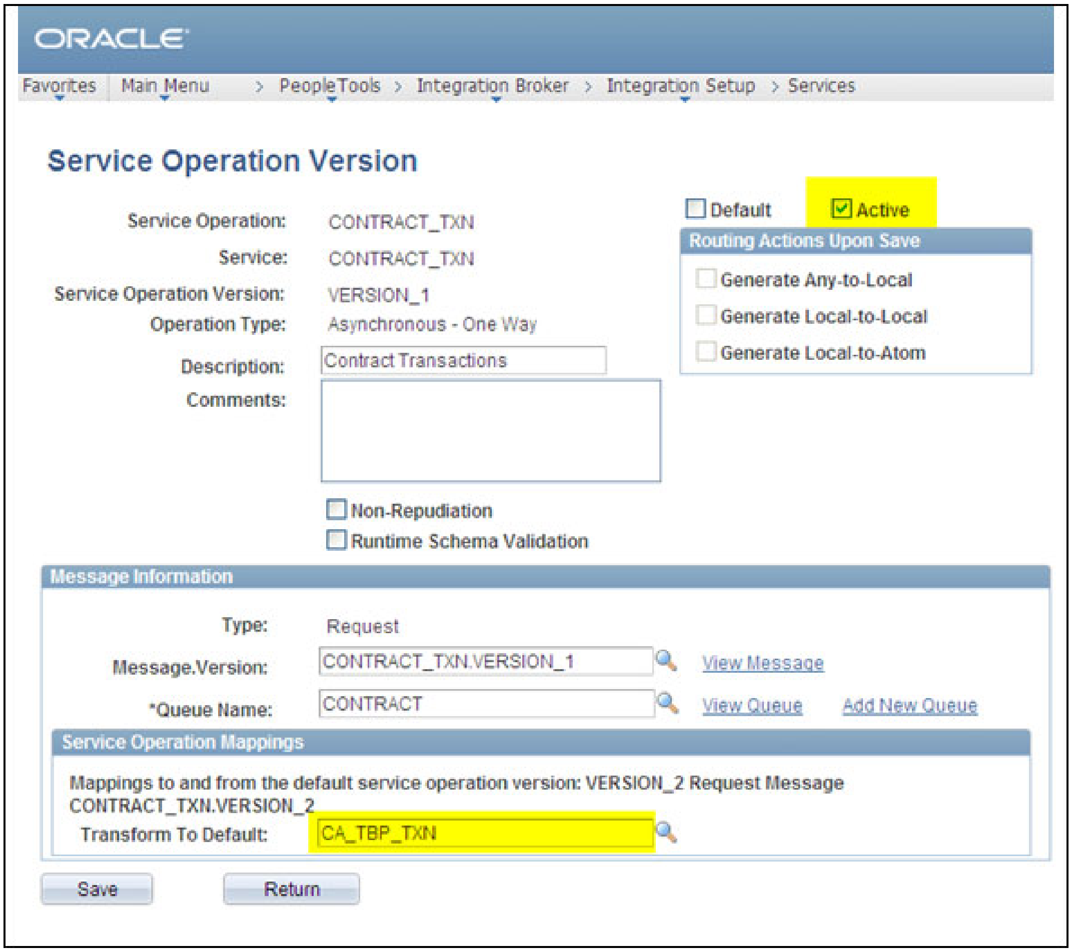
   Alternatively, select PeopleTools, Integration Broker, Integration Setup, Services, and search for service name *CONTRACT_TXN*. Then click the CONTRACT_TXN.VERSION_2 link in the Operation tab of the Existing Operations area.

The Service Operation - General page for CONTRACT_TXN appears, as shown in the following example:



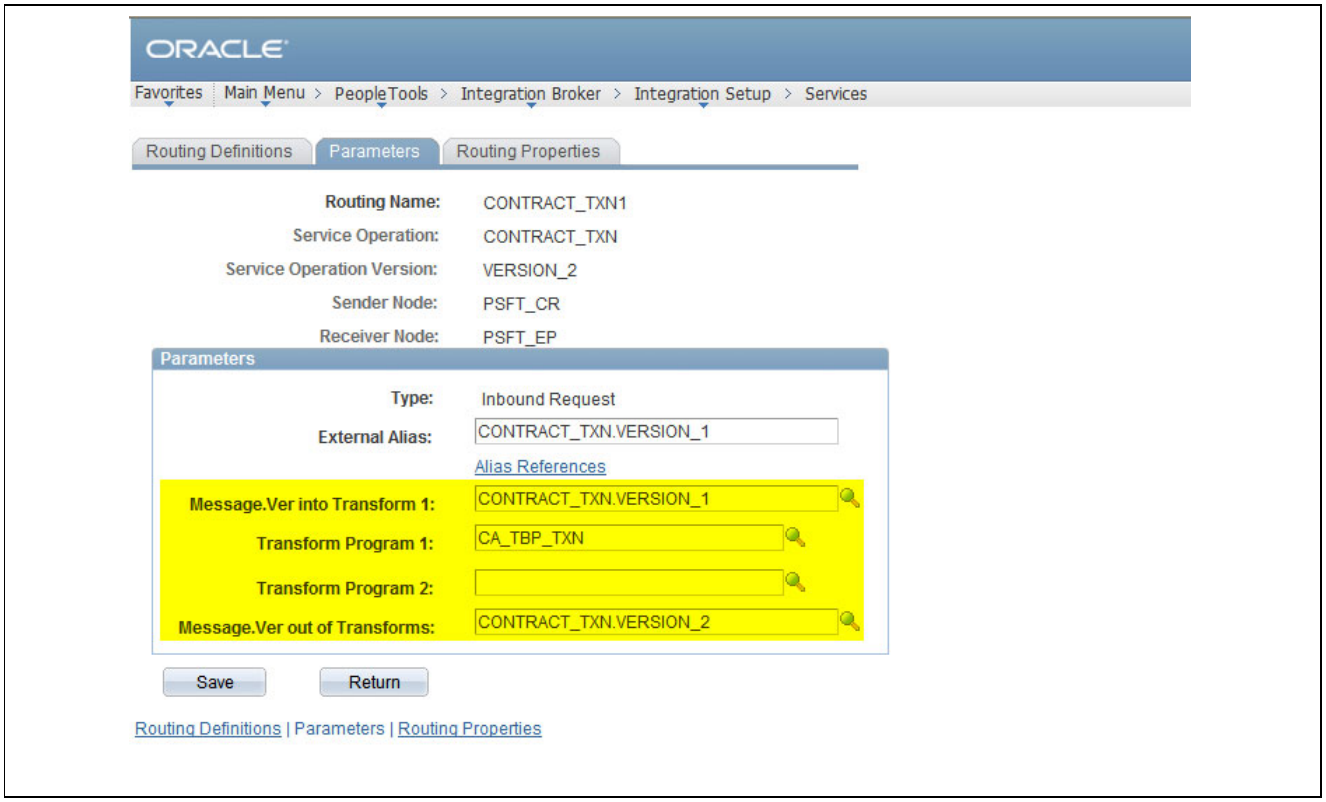
Service Operations page for CONTRACT_TXN

2. On the General page, click the VERSION_1 link listed in the Non-Default Versions group box to open the Non-Default Version – VERSION_1 page for the CONTRACT_TXN. Enter the values as shown in the following example:



Service Operation Version page

3. Select the Active check box to activate the service operation.
4. In the Transform to Default field, enter *CA_TBP_TXN*.
5. Click Save.
6. On the Service Operation page for CONTRACT_TXN, select the Routings tab to access the Routings page.
7. Select the routing link that you added or activated in the previous task.
8. Select the Parameters tab to access the Parameters page.
9. In the Transform Program 1 field, enter the application engine name *CA_TBP_TXN*.
10. In the External Alias field, enter *CONTRACT_TXN.VERSION_1*.
11. In the Message.Ver into Transform 1 field, enter *CONTRACT_TXN.VERSION_1*.
12. In the Message.Ver out of Transforms field, enter *CONTRACT_TXN.VERSION_2*, as shown in the following example:



Parameters page

13. Click Save.
14. Clear the application server and web server cache before using the system.

The installation of PeopleSoft Transaction Billing Processor 9.1 for PeopleSoft FMS is now complete.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Setting Up an Integration to the Transaction Billing Processor."

Chapter 15

Installing PeopleSoft Enterprise 9.1 Maintenance Management for Brazil with Microsoft Project 2007

This chapter discusses:

- Prerequisites
- Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine
- Installing Microsoft Project 2007
- Configuring the Microsoft Project Integration Process

Prerequisites

This chapter details the installation to integrate PeopleSoft Enterprise Maintenance Management for Brazil with Microsoft Project 2007. The integration software requires that you previously install and configure the following items:

- You must have a process scheduler server set up on a Microsoft Windows machine to run against the PeopleSoft Enterprise 9.1 Maintenance Management database for Brazil.

  The integration with Microsoft Project 2007 uses a PeopleSoft Process Scheduler server to communicate with Microsoft Project 2007.
- The Microsoft Project 2007 Software must be installed on the process scheduler server.

Important! It is important that you perform the tasks in this chapter in the order provided.

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

Follow the standard installation instructions to install PeopleSoft PeopleTools on a Microsoft Windows machine, and then configure the machine as a process scheduler to connect to the PeopleSoft Enterprise 9.1 FSCM database where the PeopleSoft Maintenance Management product resides.

Task 15-2: Installing Microsoft Project 2007

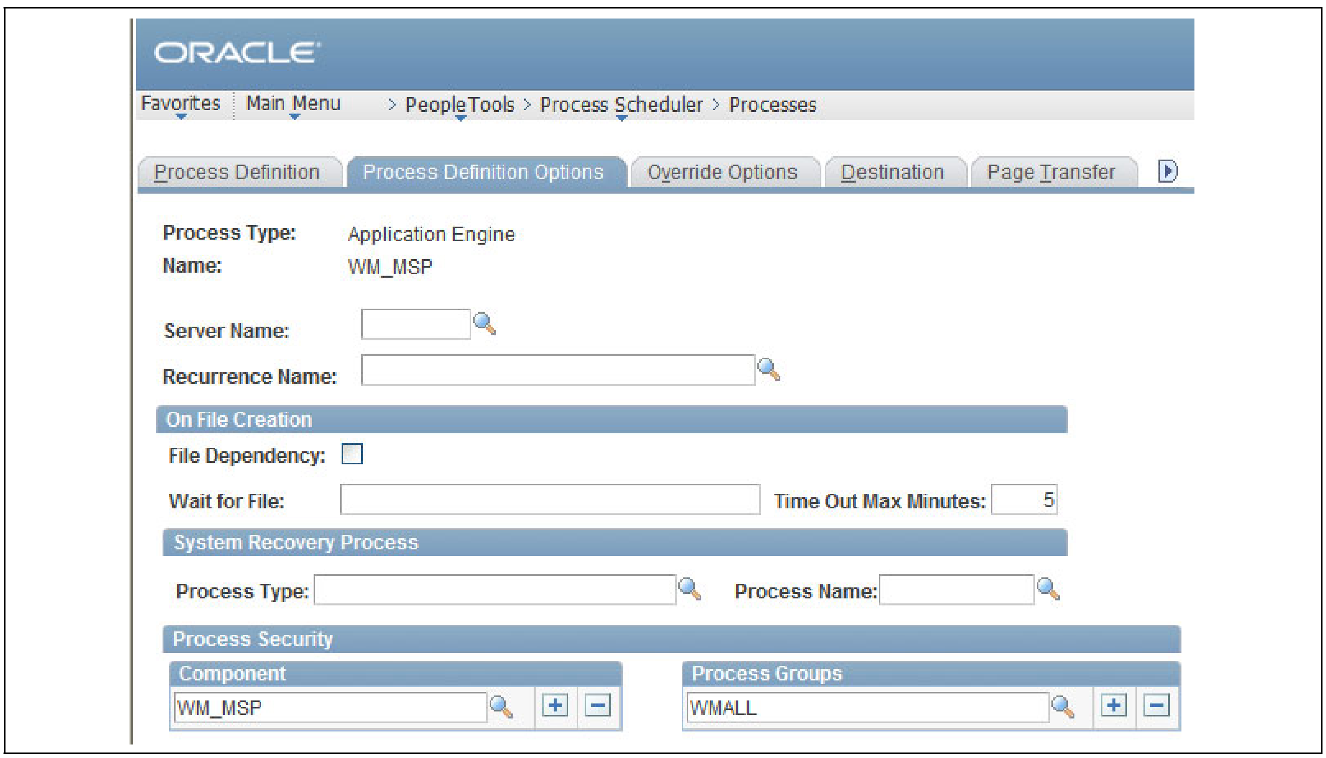
Install Microsoft Project 2007 on the same Microsoft Windows machine where the process scheduler server is installed.

Note. Caution! You should NOT install the PeopleSoft-Microsoft Project Integrator on the process scheduler that runs the Maintenance Management's Microsoft Project integration.

Task 15-3: Configuring the Microsoft Project Integration Process

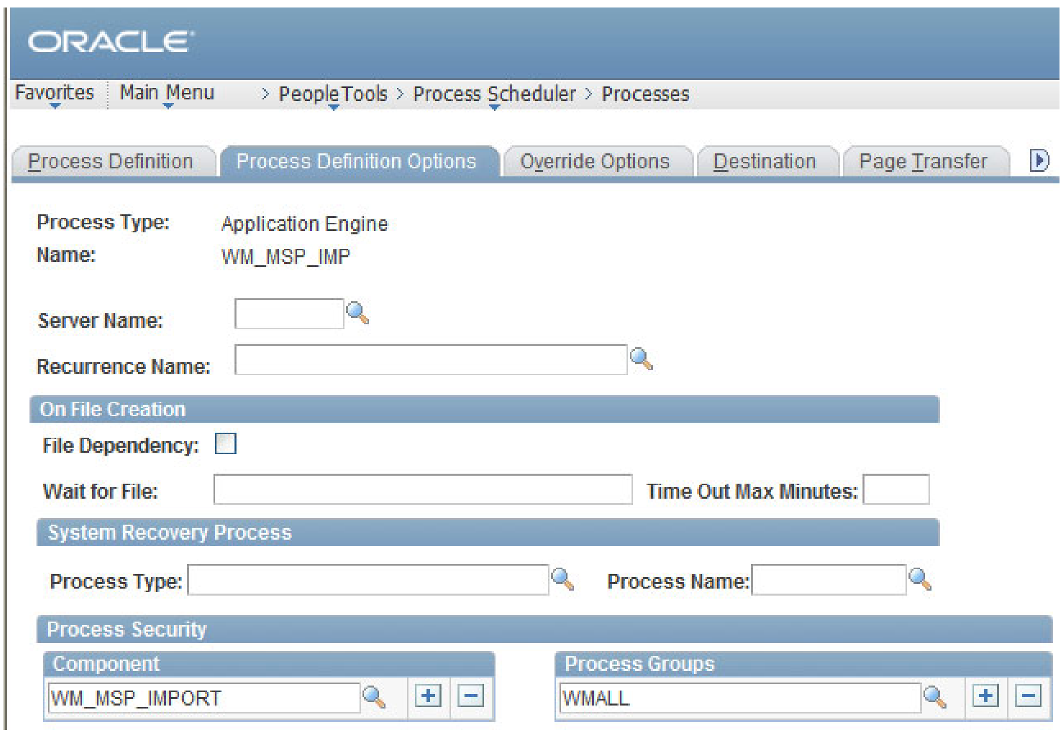
To configure the integration process:

1. Sign in to the PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Process Scheduler, Processes.
3. On the Process search page, select *Process Name* from the Search drop-down list, and then enter *WM_MSP* in the field.
4. Click Search and click the *WM_MSP* link from the search results grid.
5. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.
6. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler that you configured in the earlier task titled *"Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine,"* as shown in the following example:



Process Definition Options page for Process Name WM_MSP

7. Click Save.
8. Select PeopleTools, Process Scheduler, Processes.
9. On the Process search page, select *Process Name* from the Search drop-down list box, and then enter *WM_MSP_IMP* in the field.
10. Click Search and click the *WM_MSP_IMP* link from the search results grid.
11. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.
12. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler that you configured in the earlier task titled *"Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine,"* as shown in the following example:



Process Definition Options page for Process Name WM_MSP_IMP

13. Click Save.

Chapter 16

Integrating PeopleSoft Enterprise 9.1 Asset Management for Brazil with eCenterOne Space Management Solution (Optional)

This chapter discusses:

- Understanding PeopleSoft 9.1 Asset Management for Brazil and eCenterOne Space Management Integration
- Installing the Target Connector for eCenterOne
- Configuring the Local Gateway and Connector Properties
- Running Message Channel
- Activating the Domain for Asynchronous Messaging
- Activating Routings, Service Operations, and Updating Transaction Routings Properties
- Testing the eCenterOne Node
- Activating the Space Management Install Option
- Verifying the Integration

Understanding PeopleSoft 9.1 Asset Management for Brazil and eCenterOne Space Management Integration

PeopleSoft 9.1 Asset Management for Brazil integrates with CenterStone Software's eCenterOne Space Management solution to provide 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. If you are integrating PeopleSoft Asset Management with eCenterOne you need to purchase licensing directly from CenterStone, an additional component (third-party) vendor, before proceeding further with this installation.

See "Configuring the PeopleSoft Enterprise 9.1 IT Asset Management for Brazil with eCenterOne Space Management."

Task 16-1: Installing the Target Connector for eCenterOne

You must download connector files to integrate with the eCenterOne software.

To download the :connector files to integrate with the eCenterOne

---

Note. eCenterOne software has been acquired by Manhattan Associates. The link in step 1 redirects you to the Manhattan Associates Site.

If you encounter problems accessing the URL, locating or downloading the files, please contact CenterStone support at (508) 435–1510, option 4. For all other issues contact Oracle Customer Support.

---

1. Download the following connector files from http://www.centerstonesoft.com/integration.
   - eCenterOneTargetConnector.class
   - insert-email.xslt
   - soap.jar
2. Copy the files eCenterOneTargetConnector.class and insert-email.xslt to the following directory:

   ```
   <PS_HOME>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\classes\com⇒
   \peoplesoft\pt\integrationgateway\targetconnector
   ```
3. Copy the file soap.jar to the following directory:

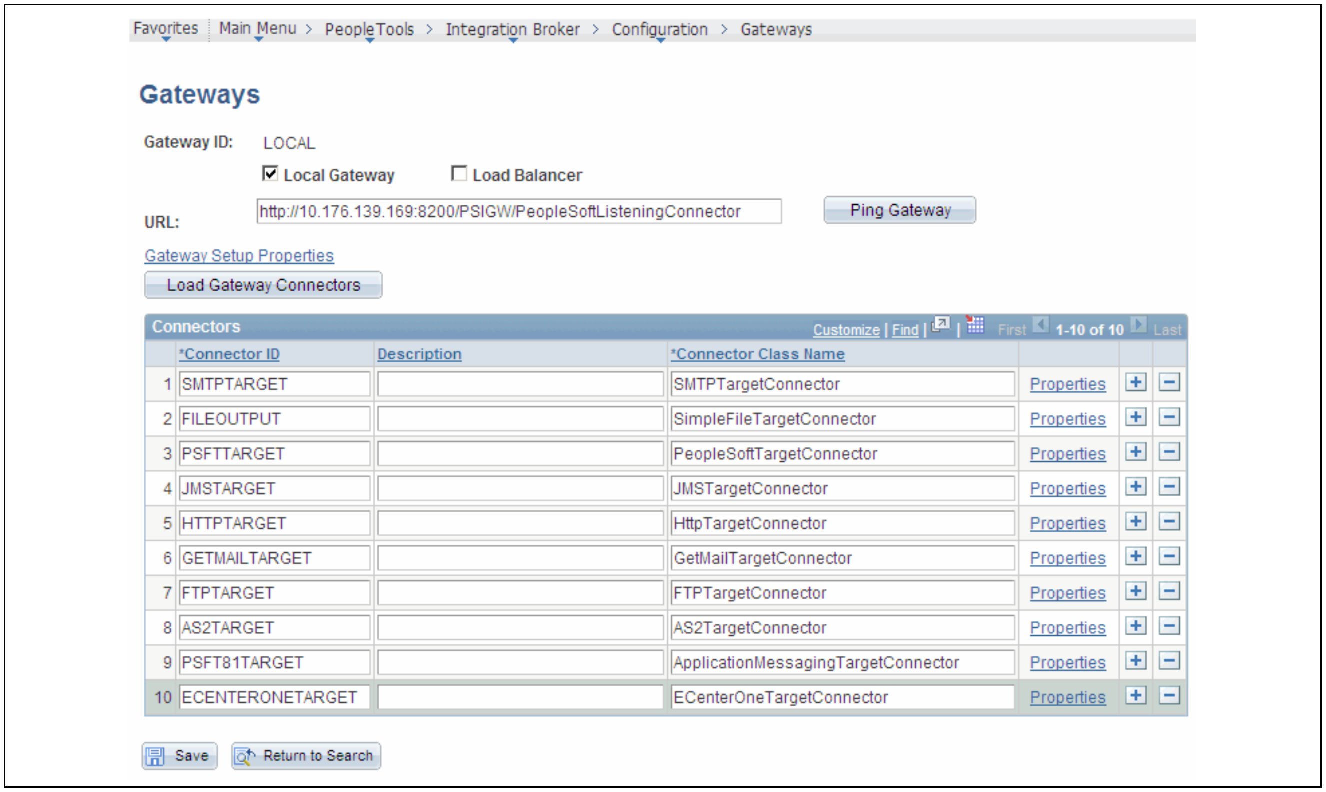
   ```
   <PS_HOME>\webserv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\lib
   ```
4. After you copy the files, restart the web server.

Task 16-2: Configuring the Local Gateway and Connector Properties

To use PeopleSoft Integration Broker to configure the Local gateway for the eCenterOne integration:

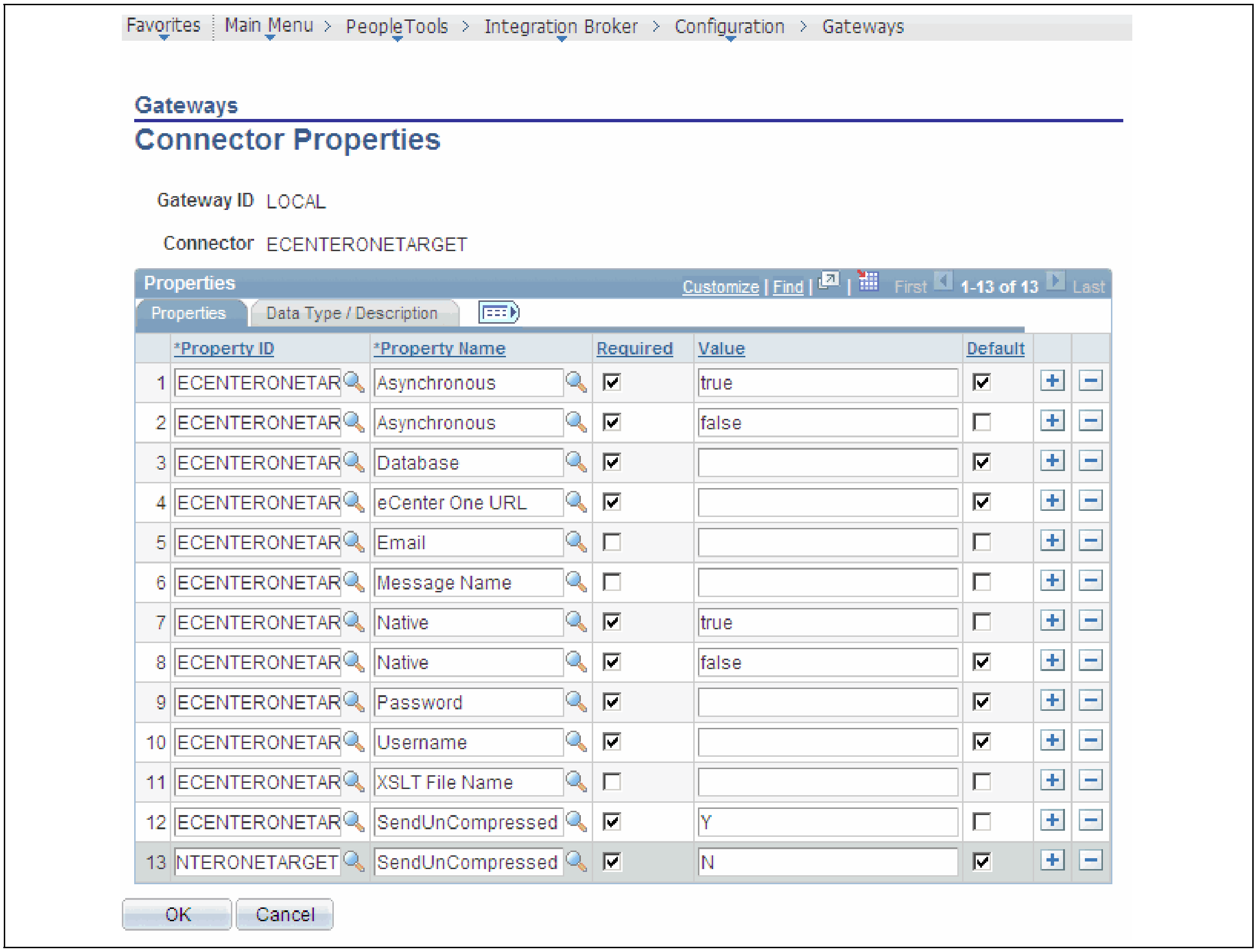
1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search. The system automatically displays the information for the Local gateway.
3. On the Gateways page for the Local Gateway, in the URL field, enter *http://<WEBSRV>/PSIGW /PeopleSoftListeningConnector*.
4. Click Save.
5. Click the Load Gateway Connectors button.

   This ensures that all of the existing connectors install on the gateway.
6. Verify that one of the connectors is ECENTERONETARGET.
7. Click Save again. This installs the connectors, as shown in the following example:



Local Gateway page

8. In the Connectors group box, click the Properties link to access the Connector Properties page.
9. On the Connector Properties page, configure the eCenterOne Connector Properties to enable Messaging to the eCenterOne Server, as shown in the following example:



Connector Properties page

10. On the Local Gateway page, click the Properties link next to ECENTERONETARGET.

11. Select the Connector Properties and update the Value field for the Property Names listed in the following table:

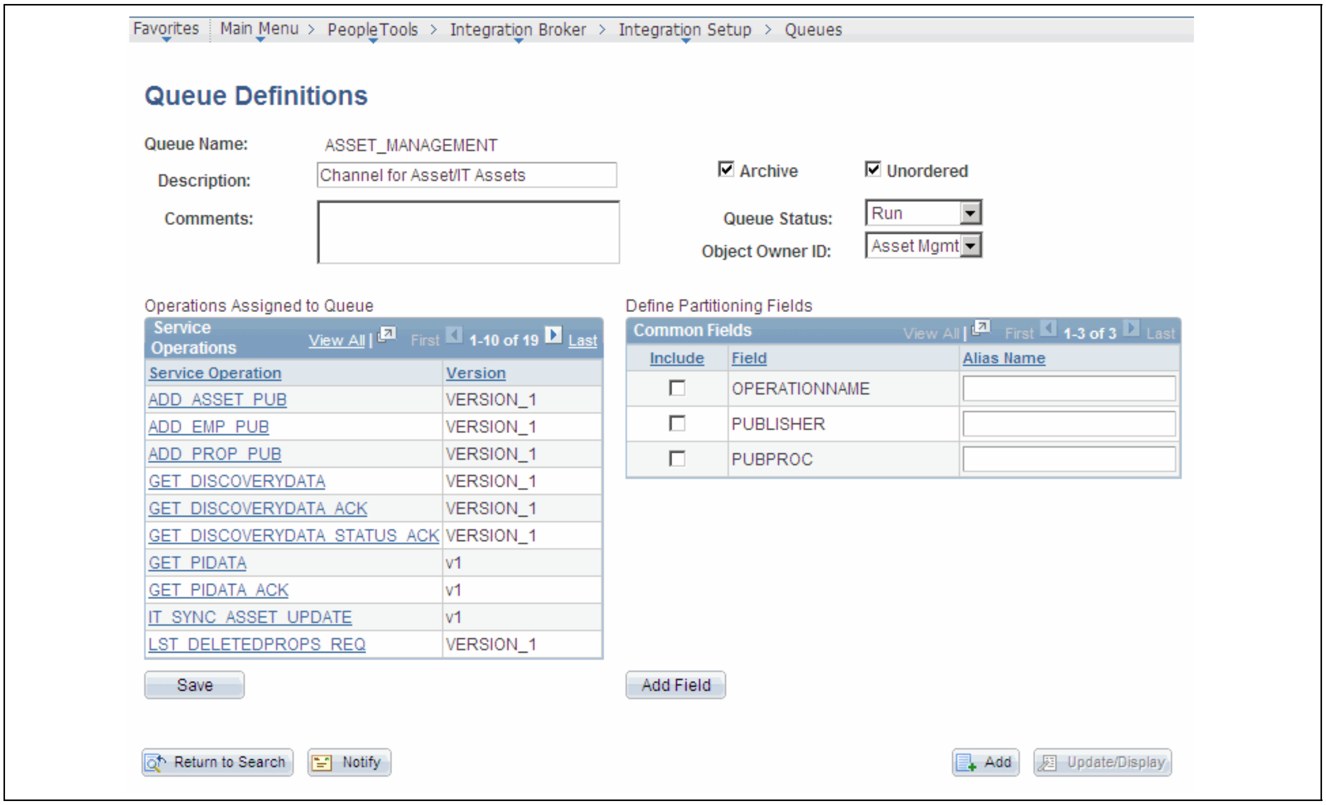
Property ID	Property Name	Description
ECENTERONETARGET	Database	Target eCenterOne Database Name
ECENTERONETARGET	Email	Email Address for Notifications from CenterStone
ECENTERONETARGET	eCenterOne URL	eCenterOne Server URL
ECENTERONETARGET	Password	eCenterOne Server Password
ECENTERONETARGET	User Name	eCenterOne Server Username

12. Click Save.

Task 16-3: Running Message Channel

To run message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Monitor Message Queues.
2. On the Queue search page, search for and select the message channel *ASSET_MANAGEMENT*.
3. On the Queue Definitions page for the ASSET_MANAGEMENT message channel, in the Queue Status field, verify that the status is Run, as shown in the following example:



Queue Definitions page

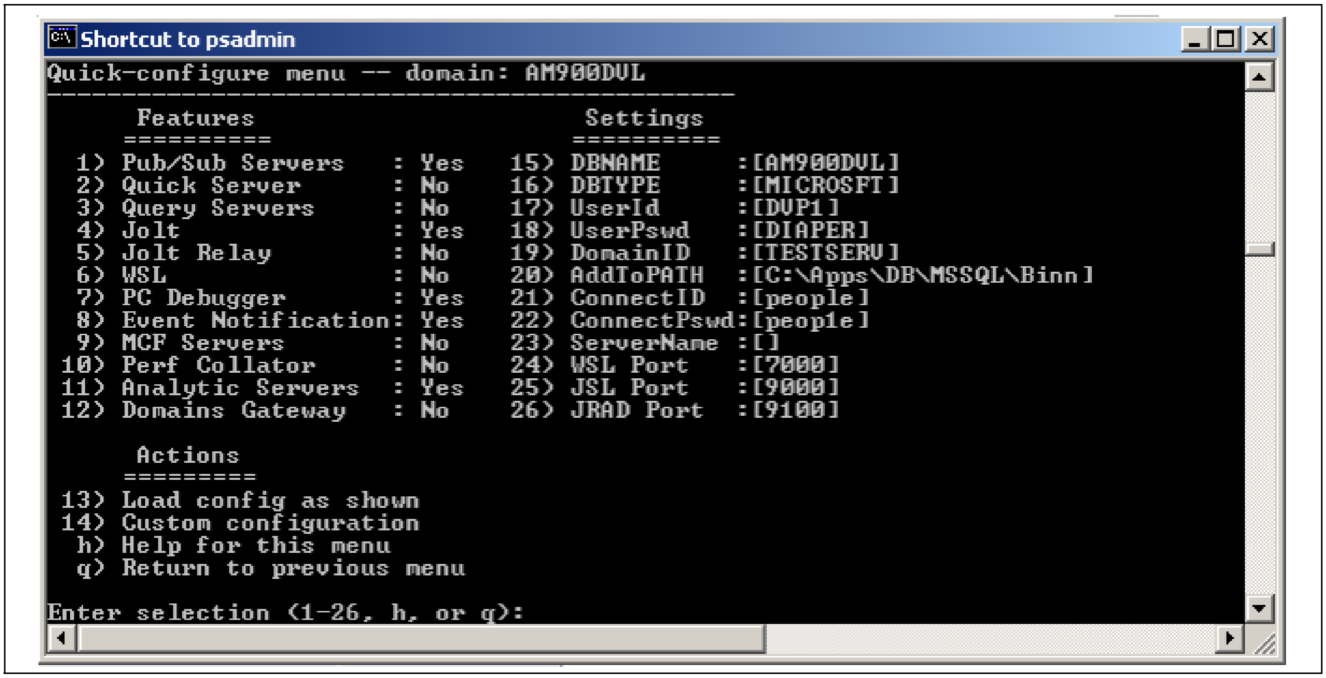
4. If the Queue Status is *Paused*, click the Run button.

Task 16-4: Activating the Domain for Asynchronous Messaging

Asynchronous message handling in the PeopleSoft system 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, verify that your domain has publish/subscribe servers configured in psadmin.

Launch psadmin.exe from <PS_HOME>/appserv, and verify that the option Pub/Sub servers is set to Yes, as shown in the following example:



Setting the pub/sub servers option in psadmin

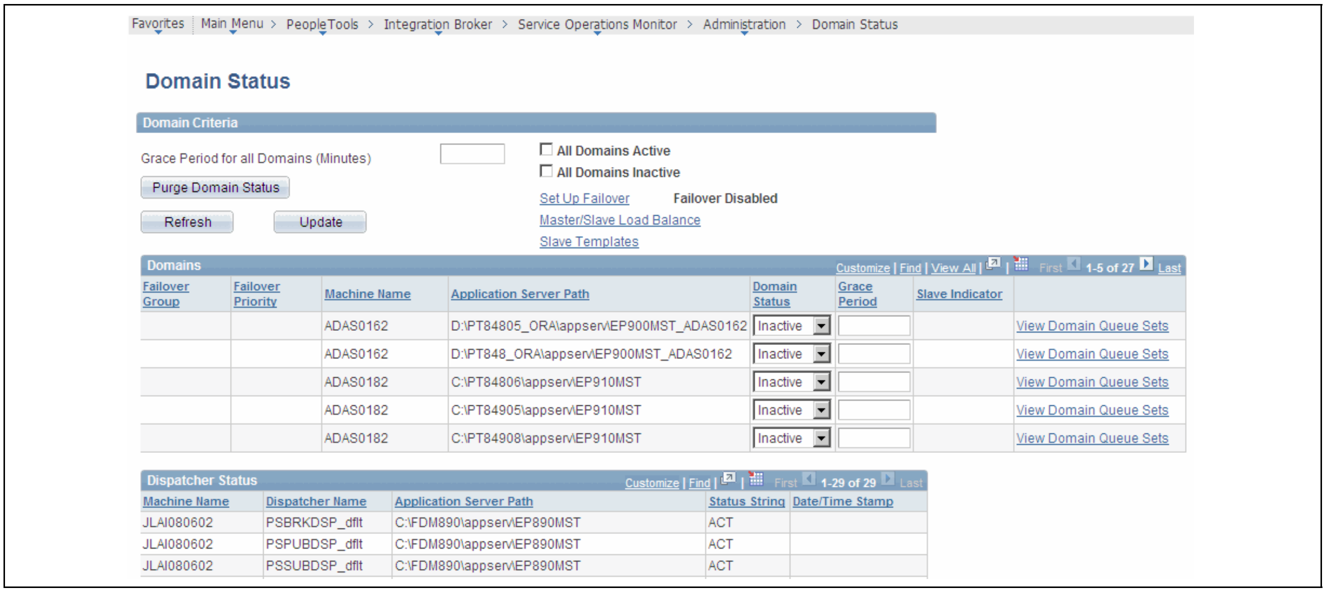
Note. Psadmin configuration supports asynchronous messaging. After you start your application server you see two new processes—one for Message Handler, and one for Message Dispatcher.

After you configure your application server, you must activate your domain through PeopleSoft Pure Internet Architecture, to ensure that the Handler and Dispatcher pick up your asynchronous messages.

To activate your domain through PeopleSoft Pure Internet Architecture:

1. Select the Connector Properties and update the Value field for the Property Names that follow.
2. Select PeopleTools, Integration Broker, Service Operations Monitor, Monitor Message, Administration, Domain Status.
3. Click the Domain Status tab to access the Domain Status page.
4. On the Domain Status page, search for your domain and in the Domain Status field, select *Active* from the drop-down list box.

   In the following example, notice that the domain is distinguished through the machine name:



FO_WC_CO_STATE_SYNC

Task 16-5: Activating Routings, Service Operations, and Updating Transaction Routings Properties

For Oracle customers only: Run the following statement against the PeopleSoft FSCM 9.1 database using SQL*PLUS before running the scripts in this section:

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

1. Using a database query tool (such as iSQL, SQL*Plus, and DB2 Command Window) sign in to the target PeopleSoft FSCM database.

2. Edit the AM_CAFM_IB_UPDATE.SQL script from the Scripts directory under the folder where PeopleSoft Asset Management FSCM was installed.

   Edit the entries in the AM_CAFM_IB_UPDATE.SQL file and update the following values between delimiters << and >> in single quotes. Cornerstone/Manhattan Associates should provide these values when the eCenterOne software is purchased.

   ```
   <<URL>>
   <<DATABASE>>
   <<USERNAME>>
   <<PASSWORD>>
   ```

   For 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_PROPID_PUB','LST_DELETEDPROPS_REQ','LST_NEWPROPS_⇒
   REQ','UPD_EMPLOC_REQ','UPD_PROP_REQ'));
   ```

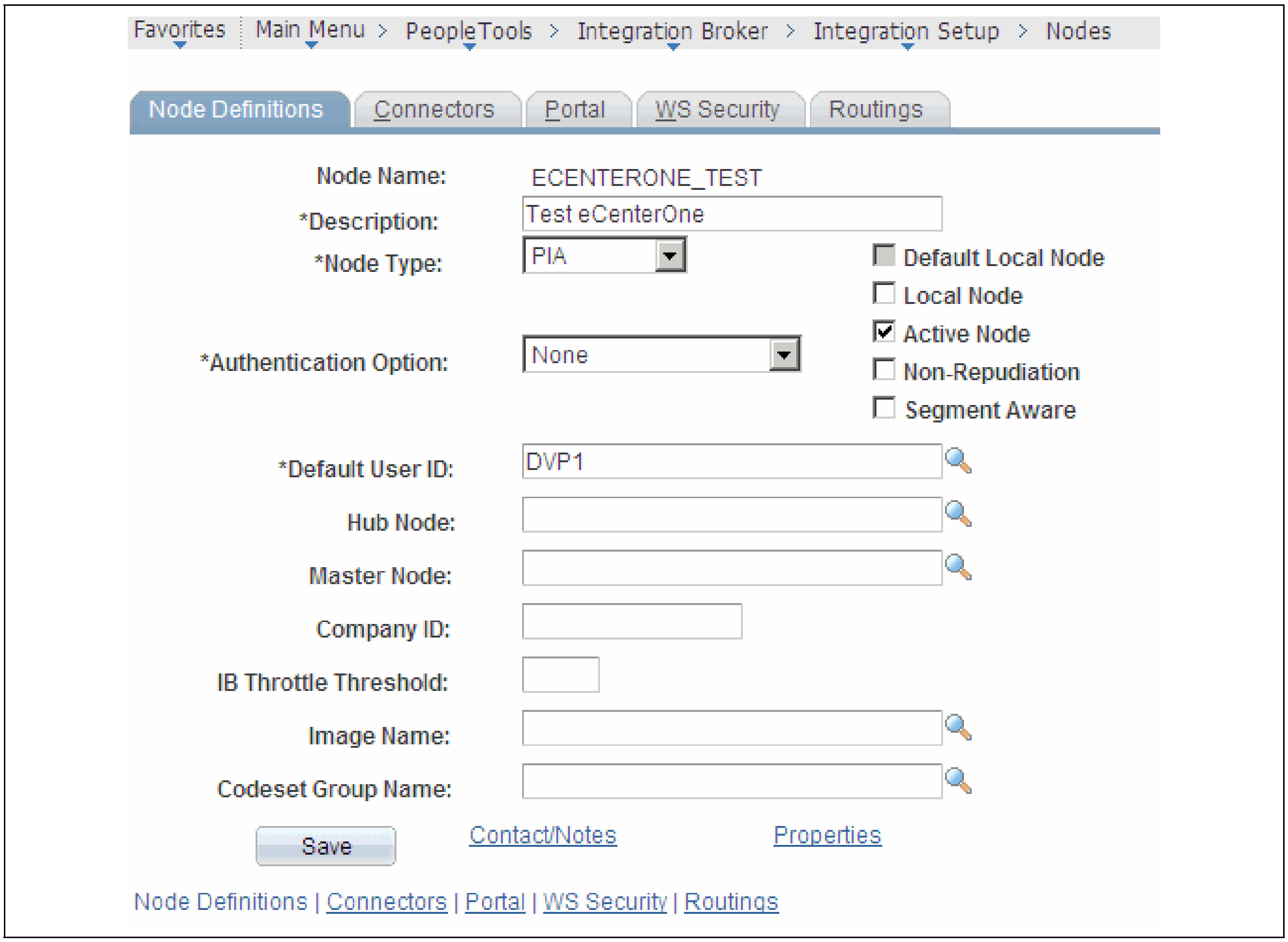

3. Run the script.

Task 16-6: Testing the eCenterOne Node

Create an eCenterOne test node and ping to verify that the connection properties are correct.

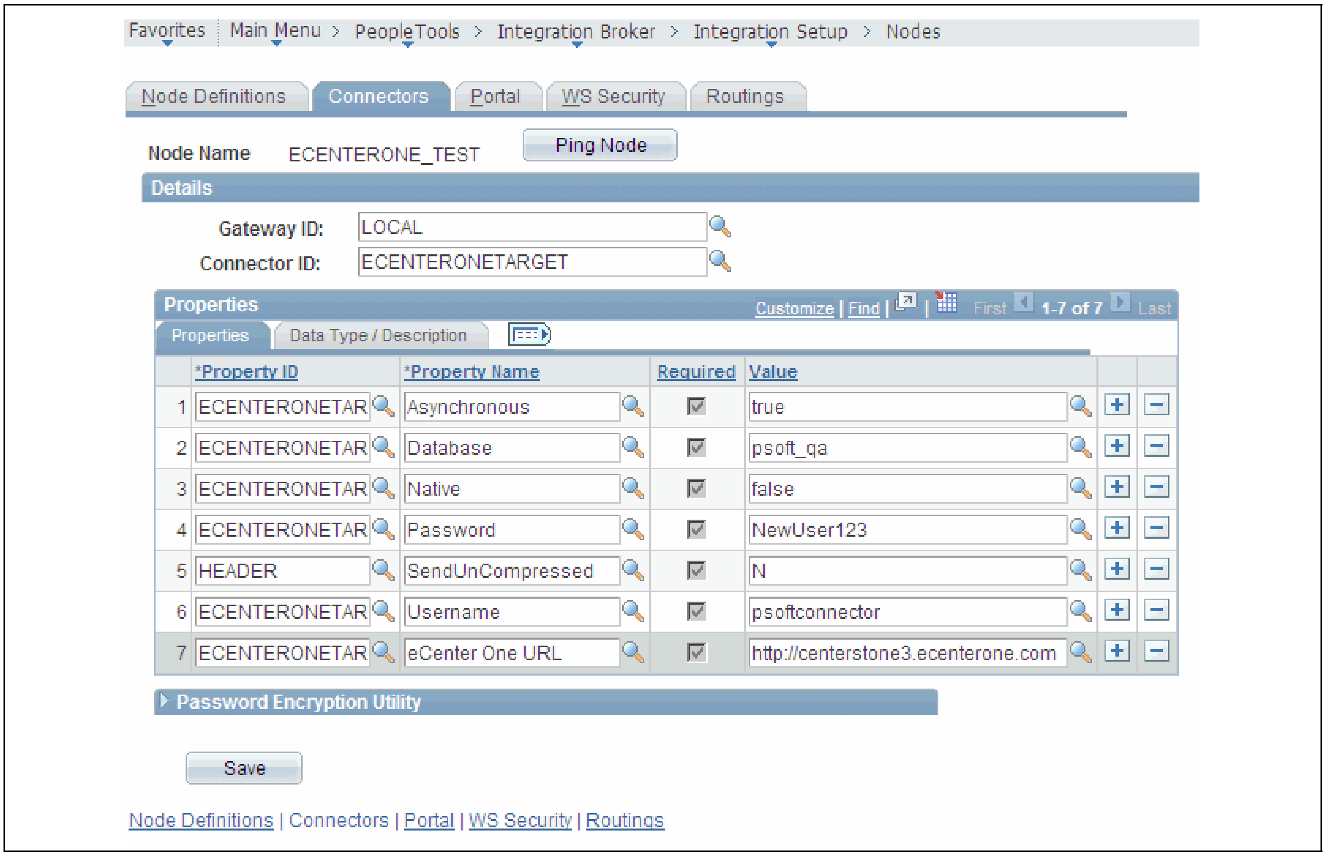
To test the eCenterOne node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, select the Add a New Value tab to add a new test node, such as *ECENTERONE_TEST*.
3. Select the Node Definitions tab to acceess the Node Definitions page, as shown in the following example:



Node Definitions page

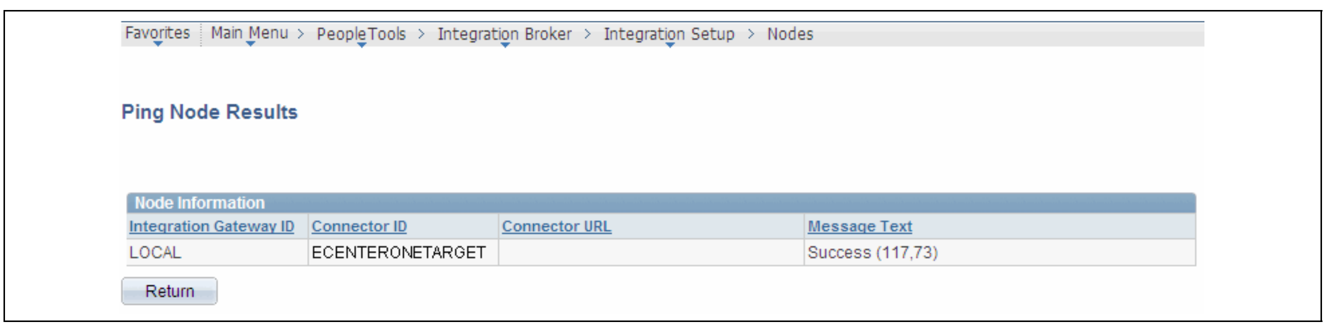
4. On the Node Definitions page, enter the following values:
   - In the Description field, enter *Test eCenterOne*.
   - In the User ID field, enter *DVP1*.
5. Select the Connectors tab to access the Connectors page, as shown in the following example:



Node Connectors page

6. On the Connectors page, in the Connector ID field, click the look up button to select *ECENTERONETARGET*.
7. Click Save.
8. Click the Ping Node button to verify that the ping is successful.

   If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



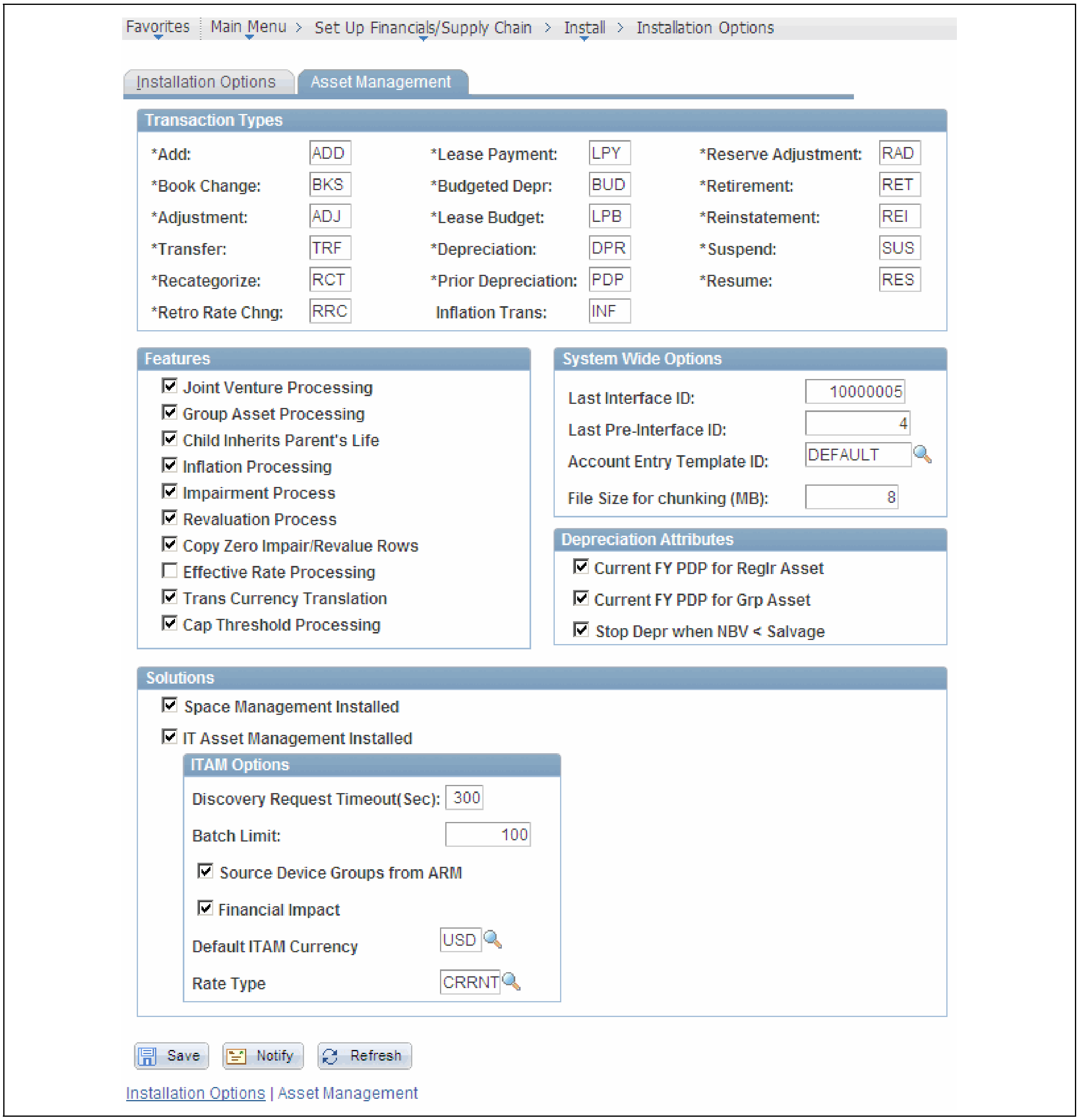
Ping Node Results page

9. Shut down and restart the application server and the web server.

Task 16-7: Activating the Space Management Install Option

To activate the Space Management install option:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. On the Installation Options page, select the Asset Management tab to access the Asset Management page.
3. On the Asset Management page, in the Solutions group box, select the Space Management Installed check box, as shown in the following example:



Installation Options - Asset Management page

4. Click Save.

Task 16-8: Verifying the Integration

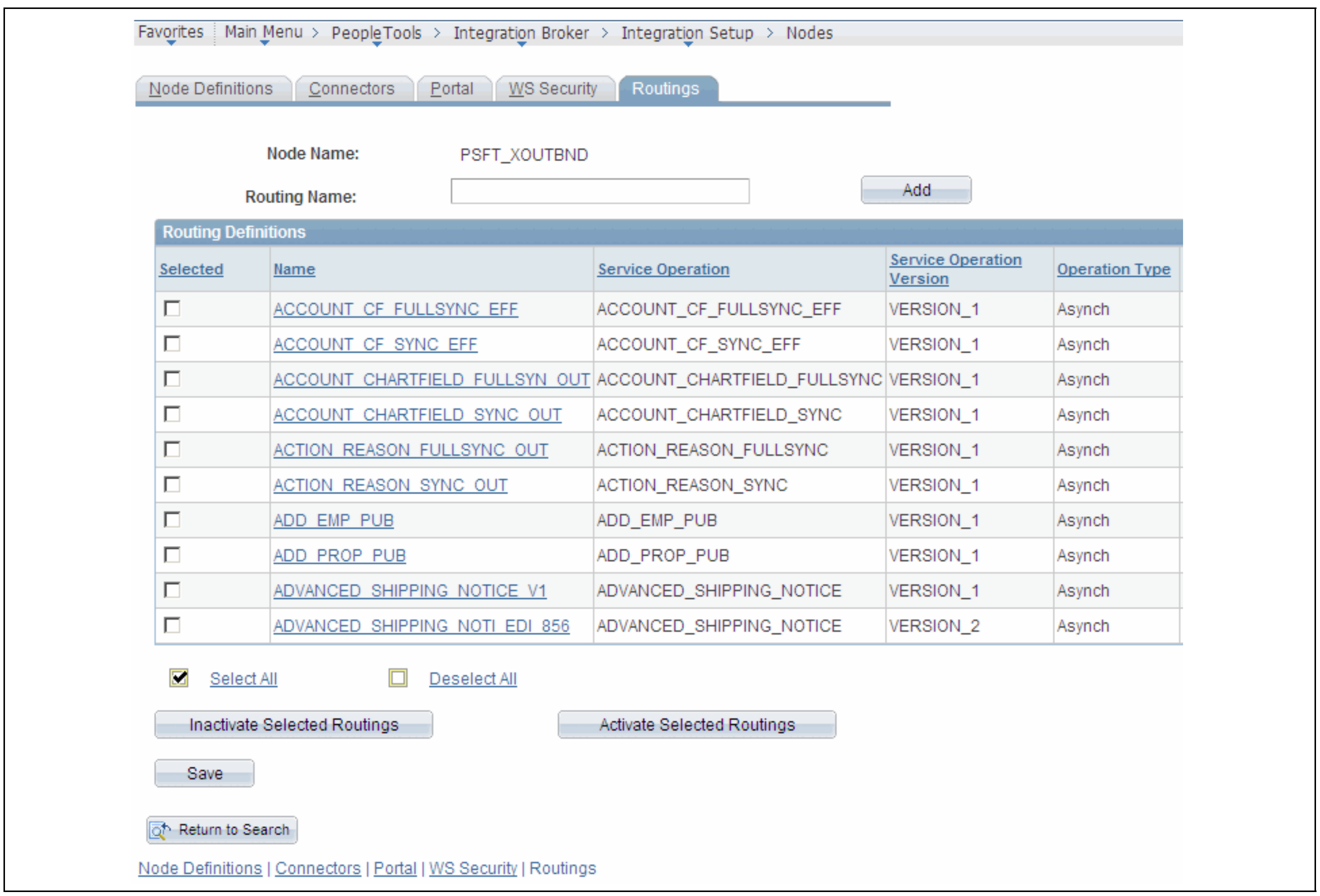
This section discusses:

- Verifying Node Definitions
- Verifying Service Operations

Task 16-8-1: Verifying Node Definitions

To verify node definitions:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_XOUTBND*.
3. On the Node Definitions page, select the Routings tab to access the Routings page, as shown in the following example:



Routings page

4. On the Routings page, verify that there are routings defined for the PSFT_XOUTBND node for the following messages:

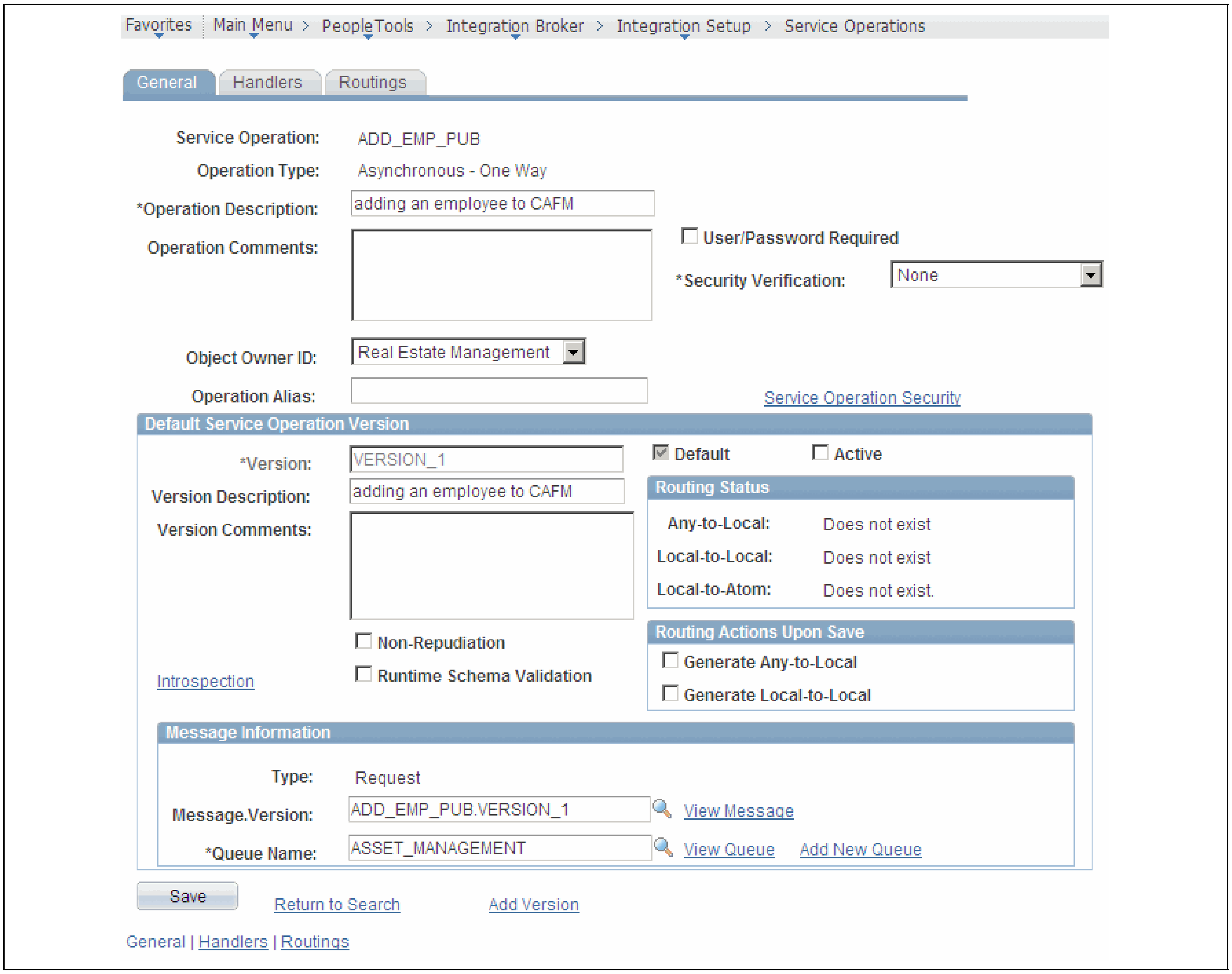

```
ADD_EMP_PUB
ADD_PROP_PUB
SYNC_DEPT_HIER_PUB
SYN_EMP_PUB
UPD_EMP_PUB
UPD_PROPID_PUB
LST_DELETEDPROPS_REQ
LST_NEWPROPS_REQ
UPD_EMPLOC_REQ
UPD_PROP_REQ
```

5. For each routing, click the Detail link to verify that the details are correct.

Task 16-8-2: Verifying Service Operations

To verify service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On Service Operations search page, search for and select the service operation *ADD_EMP_PUB*.
3. On the Service Operations - General page for ADD_EMP_PUB, verify that the details are correct, as shown in the following example:



Service Operations - General page

4. Repeat steps 2–3 to verify that the details are correct for all of the other service operations.
5. If you make any changes, click Save.

For additional information about this integration, refer to the following:

See *PeopleSoft Enterprise Real Estate Management 9.1 PeopleBook,* "Integrating with Other Applications."

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.1 PeopleBook,* "Integrating PeopleSoft Asset Management with Other Products."

CHAPTER 17

Integrating PeopleSoft 9.1 Asset Management for Brazil with Physical Inventory Solutions

Understanding PeopleSoft 9.1 Asset Management for Brazil and Physical Inventory Solutions Integration

PeopleSoft 9.1 Asset Management for Brazil integrates with additional component (third-party) Physical Inventory Solutions to provide the following functionality:

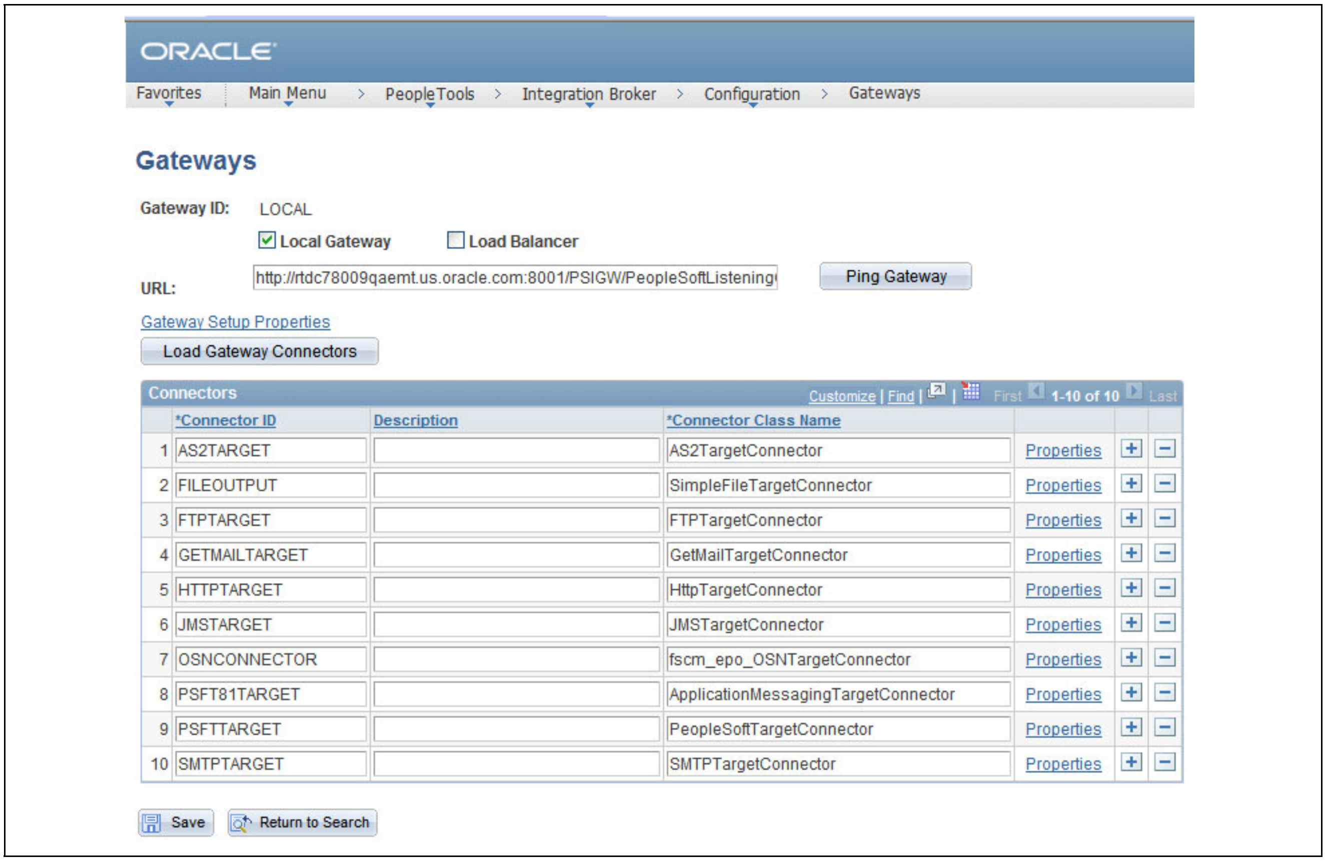
- Publish lists of assets in the asset repository that need to undergo the physical inventory process.
- Upload results of physical inventory into the asset repository.

Note. In prior PeopleSoft releases, this feature is only available using flat files. The tasks in this chapter are optional if the Physical Inventory feature is not implemented, or if the Physical Inventory feature is implemented using flat files.

Task 17-1: Configuring the Local Gateway

To configure the local gateway:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search. The Local Gateway page automatically appears, as shown in the following example:



Gateways page

3. On the Gateways page, in the URL field, enter the following URL:

   http://<WEBSRV:PORT>/PSIGW/PeopleSoftListeningConnector

4. Click Save.
5. Click the Load Gateway Connectors button.

   This ensures that all of the existing connectors install on the gateway.

6. Click Save.

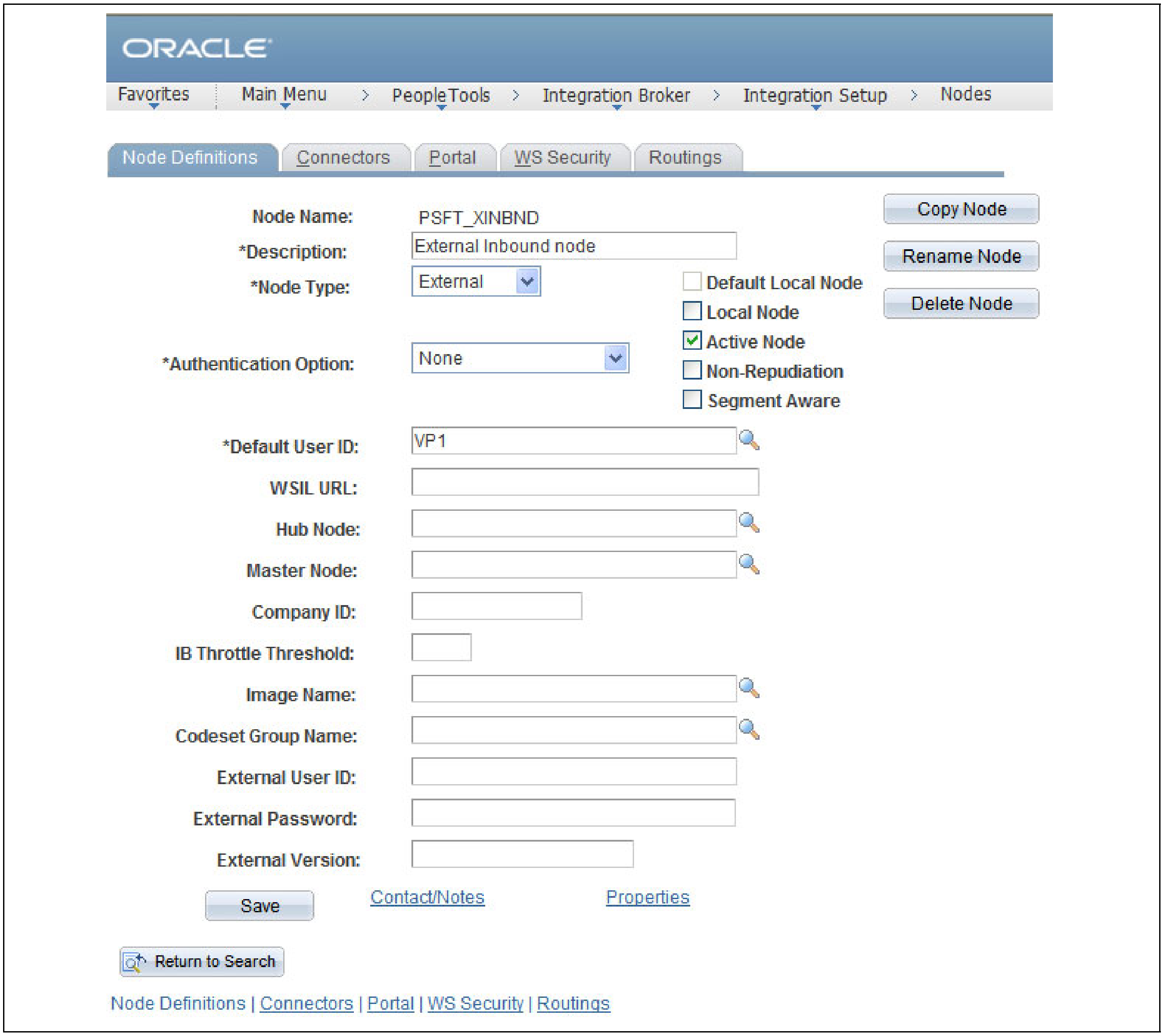
   The connectors are installed.

Task 17-2: Configuring the Inbound Nodes

To configure the inbound nodes:

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

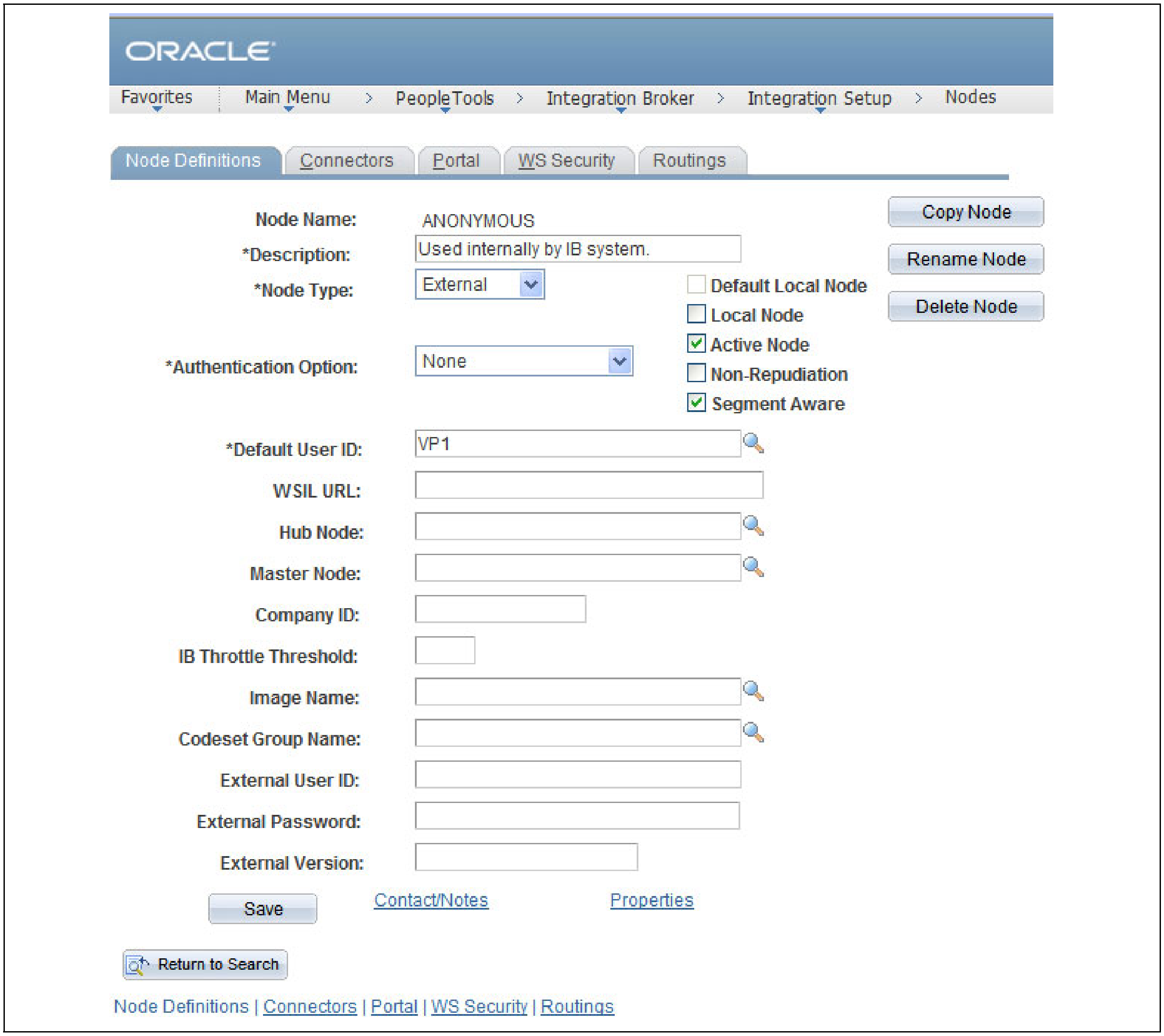
   The Node Definitions page appears, as shown in the following example:



Node Definitions page for PSFT_XINBND

3. On the Node Definitions page, in the Default User ID field, enter the value for the user that will be making the request from ITAM for the PSFT_XINBND nodes.
4. Click Save, and then click the Return to Search button.
5. On the Nodes search page, search for and select the node name *ANONYMOUS*.

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



Node Definitions - Anonymous page

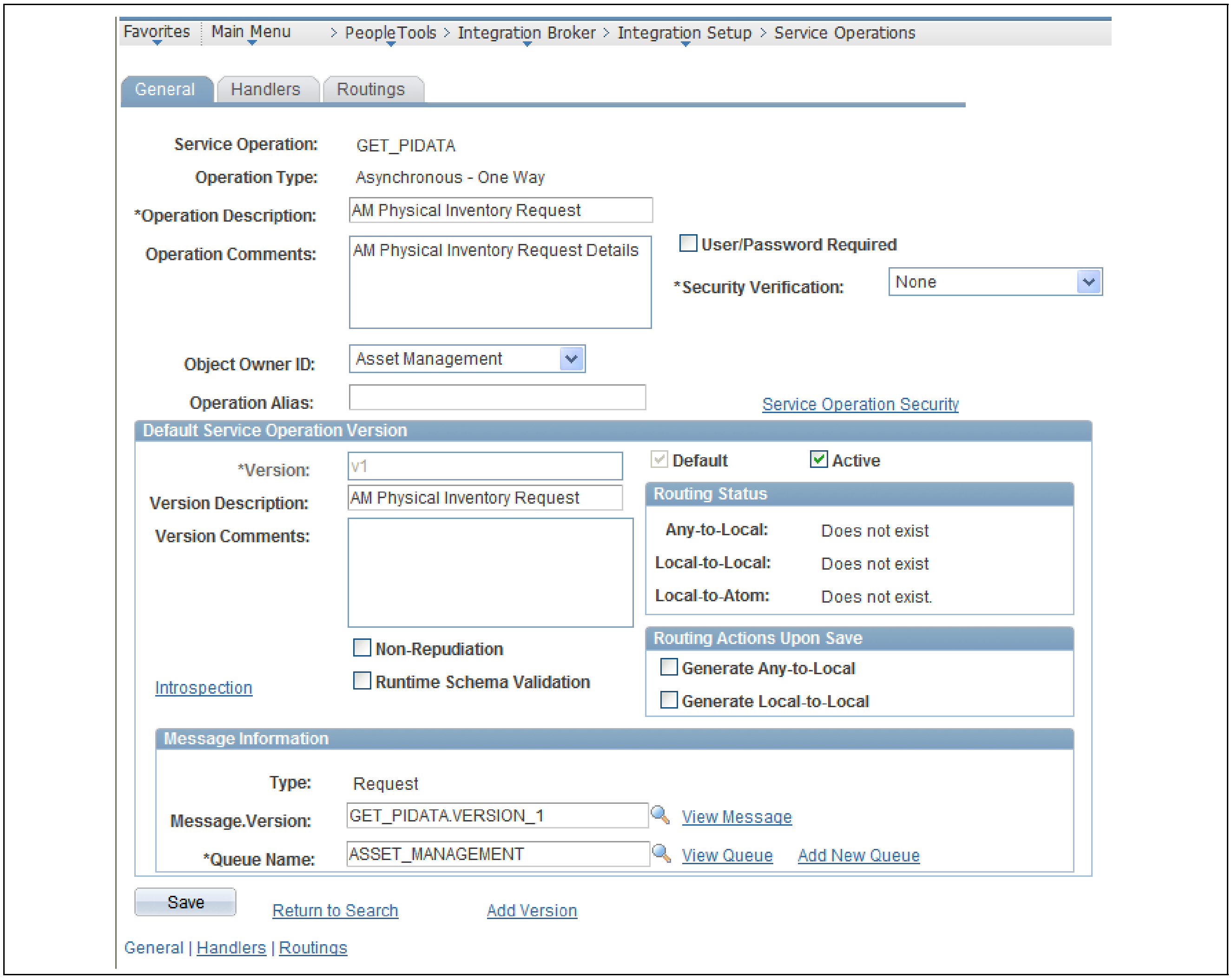
6. On the Node Definitions page, in the Default User ID field, enter the value for the user that will be making the request from ITAM for the ANONYMOUS node.
7. Click Save.

Task 17-3: Activating Service Operations

To activate service operations:

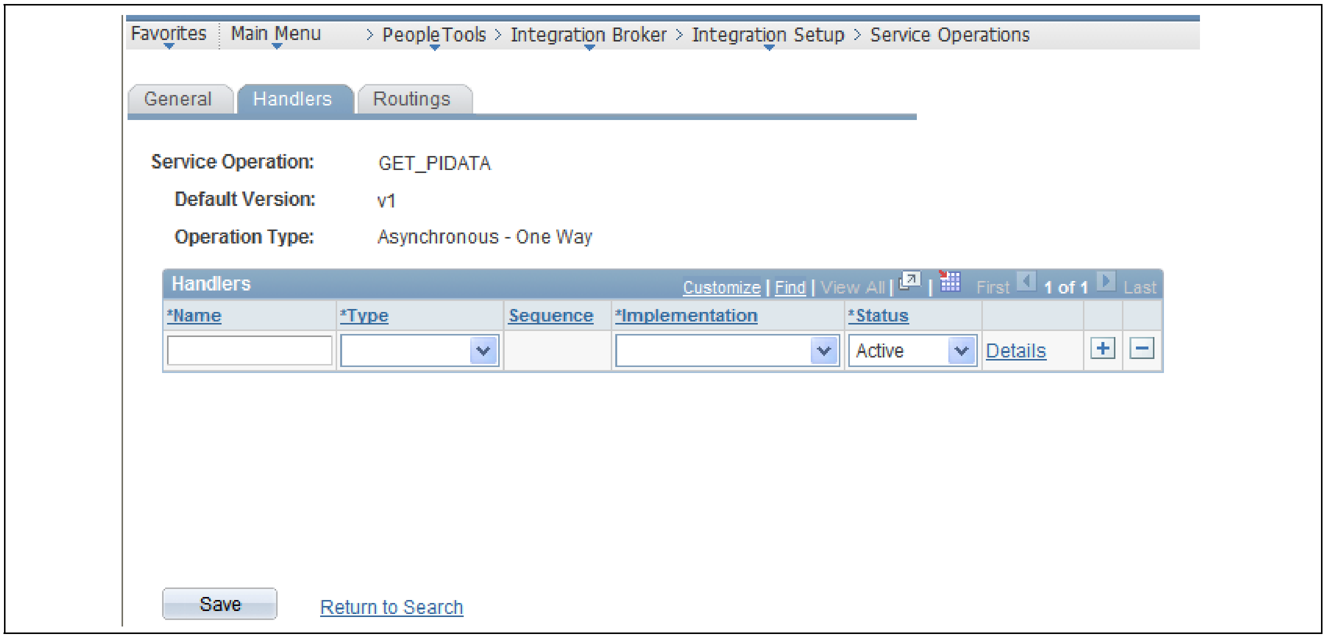
1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operations search page, search for and select the service operation *GET_PIDATA*.

   The Service Operations - General page appears, as shown in the following example:



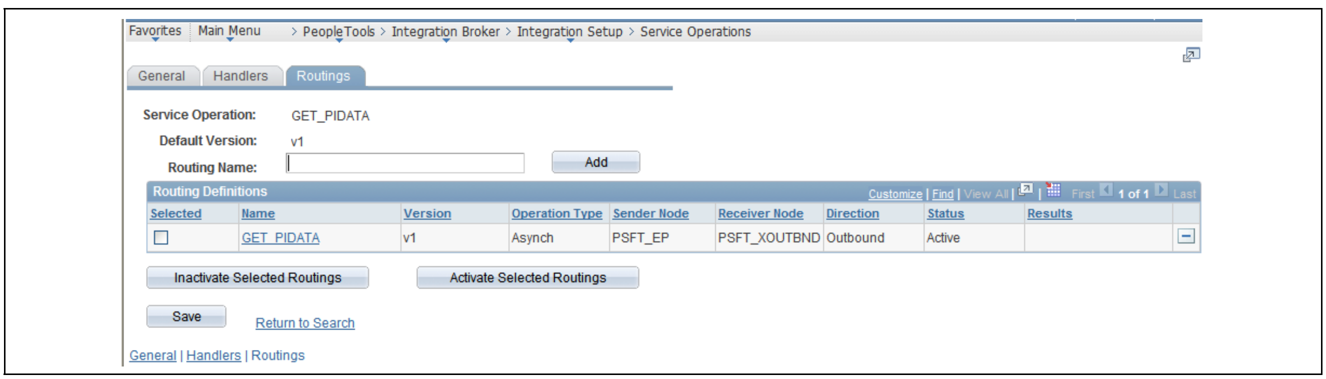
Service Operations - General page

3. On theGeneral page, select the Active check box, and then click Save.
4. On the Save Message dialog box that appears, click OK.
5. Select the Handlers tab to access the Handlers page, as shown in the following example:



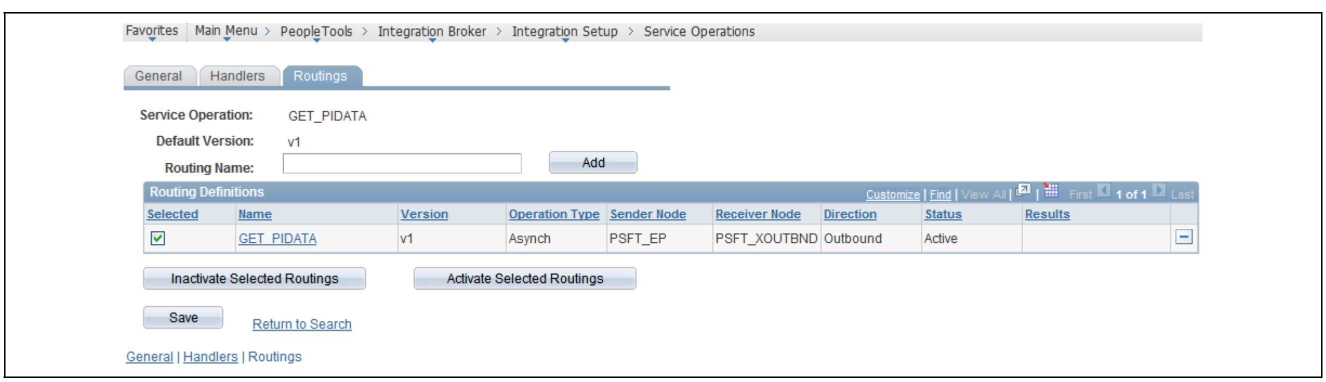
Service Operations - Handlers page

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



Service Operations - Routings page

9. On the Routings page, select the routing GET_PIDATA, as shown in the following example:

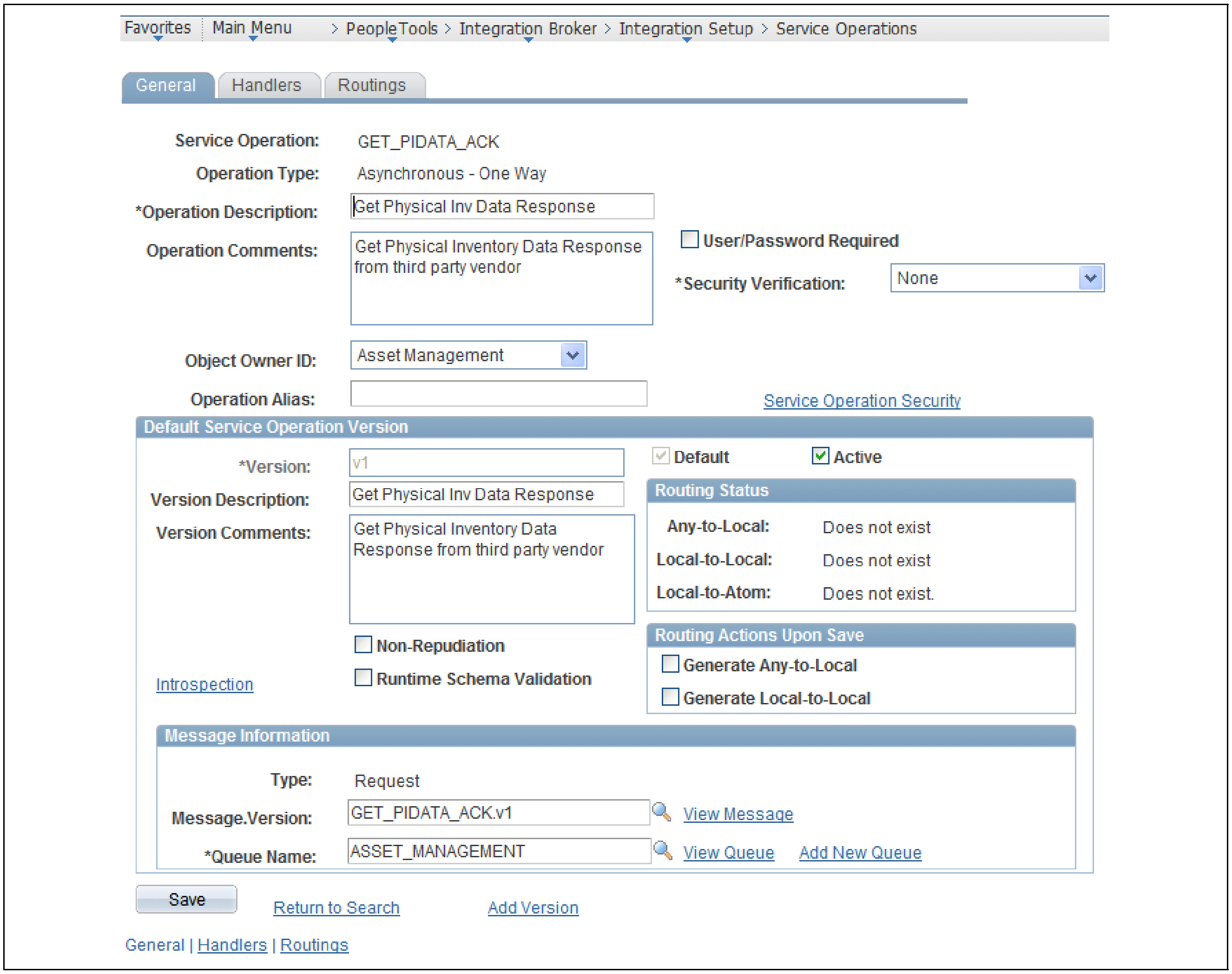


Service Operations - Routings: Selected page

10. Click the Activate Selected Routings button.

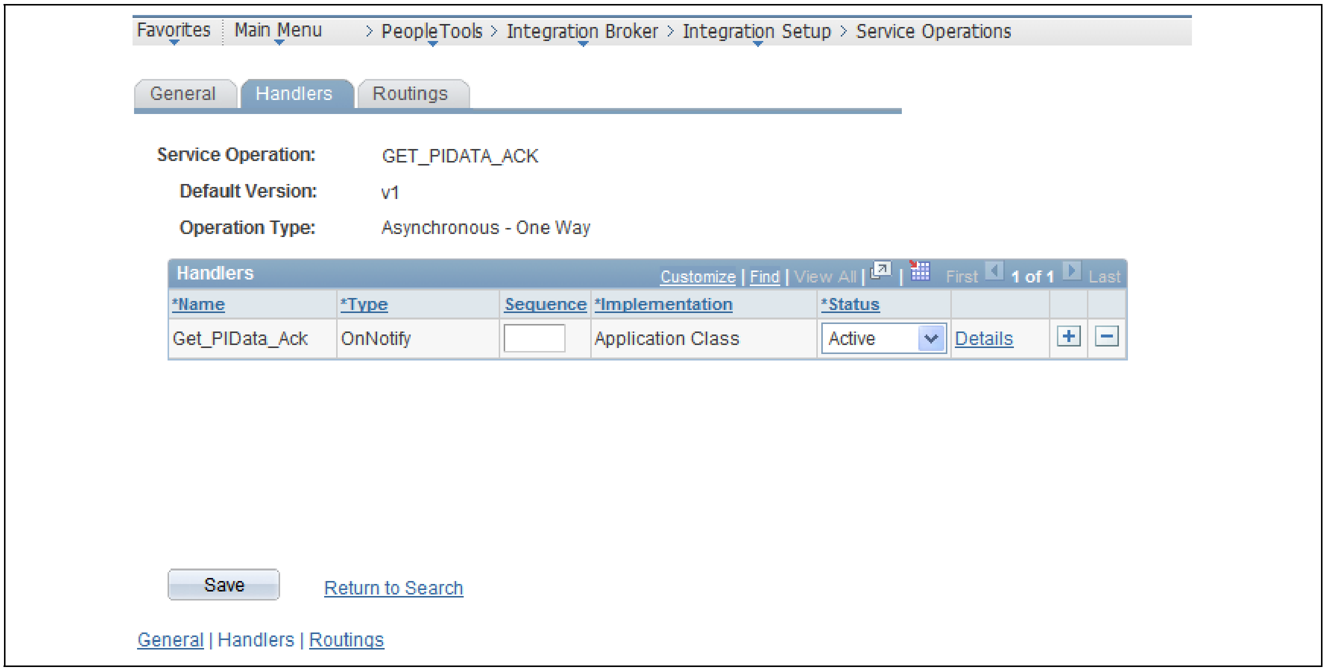
11. Select the General tab to access the General page.
12. Click the Return to Search link.
13. On the Service Operations search page, search for and select the service name *GET_PIDATA_ACK*.

    The Service Operations - General page appears, as shown in the following example:



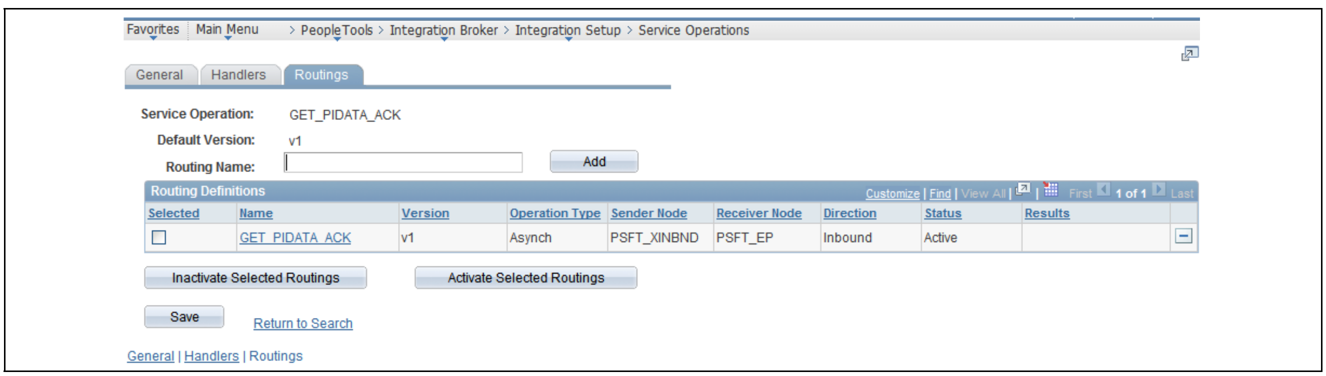
Service Operations - General page

14. On the General page, select the Active check box, and then click Save.
15. On the Save Message dialog box that appears, click OK.
16. Select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations - Handlers page

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



Service Operations - Routings page

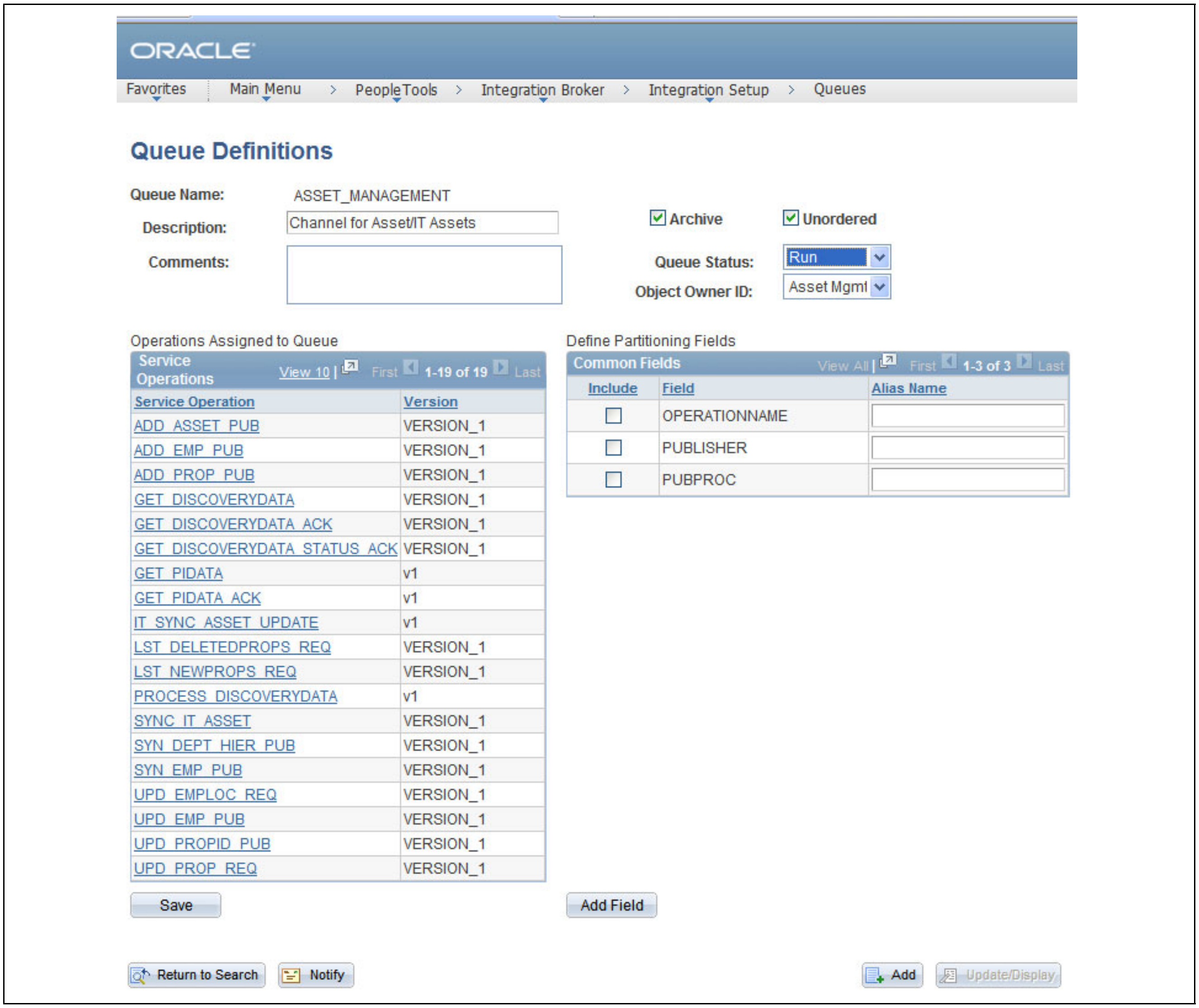
20. Select the routing that you want to activate.
21. Click the Activate Selected Routings button.
22. Click Save.

Task 17-4: Running Message Channel

To run the message channel:

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

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



Queue Definitions

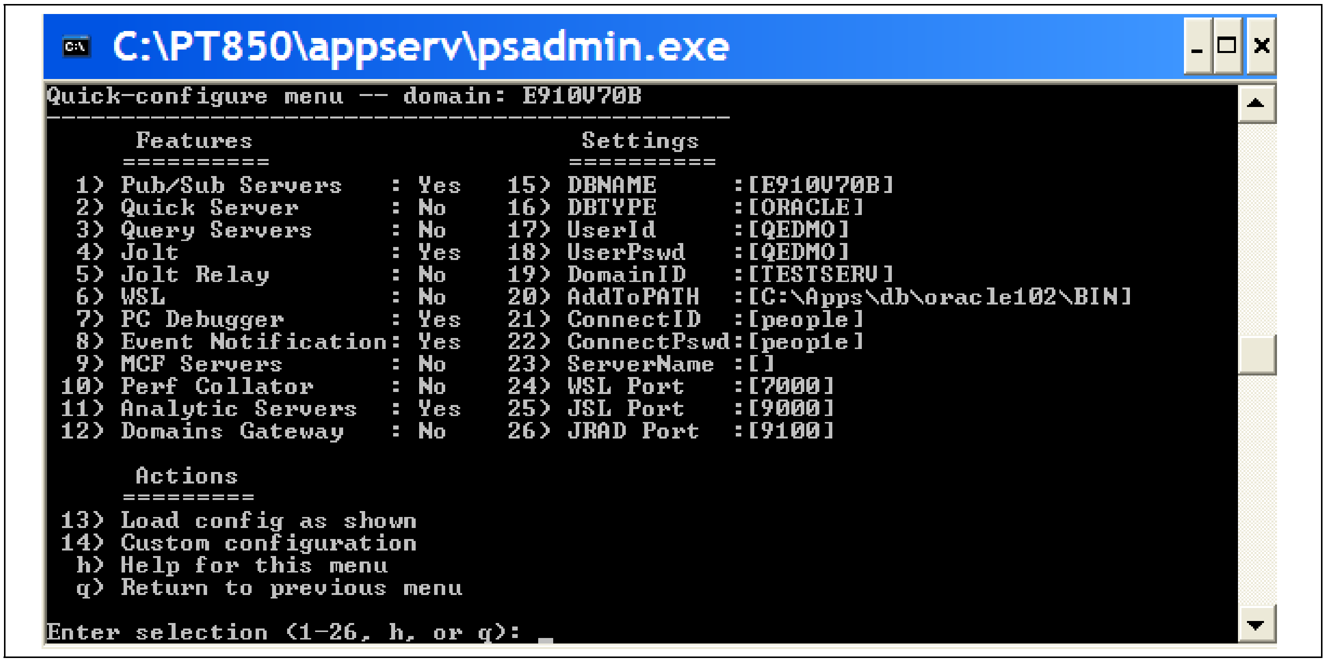
3. On the Queue Definitions page, verify that the Queue Status is set to *Run*.
4. If the Queue Status is *Paused*, select *Run* from the Queue Status drop-down list box.
5. Click Save.
6. On the Save Message dialog box that appears, click OK.

Task 17-5: Activating the 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:

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



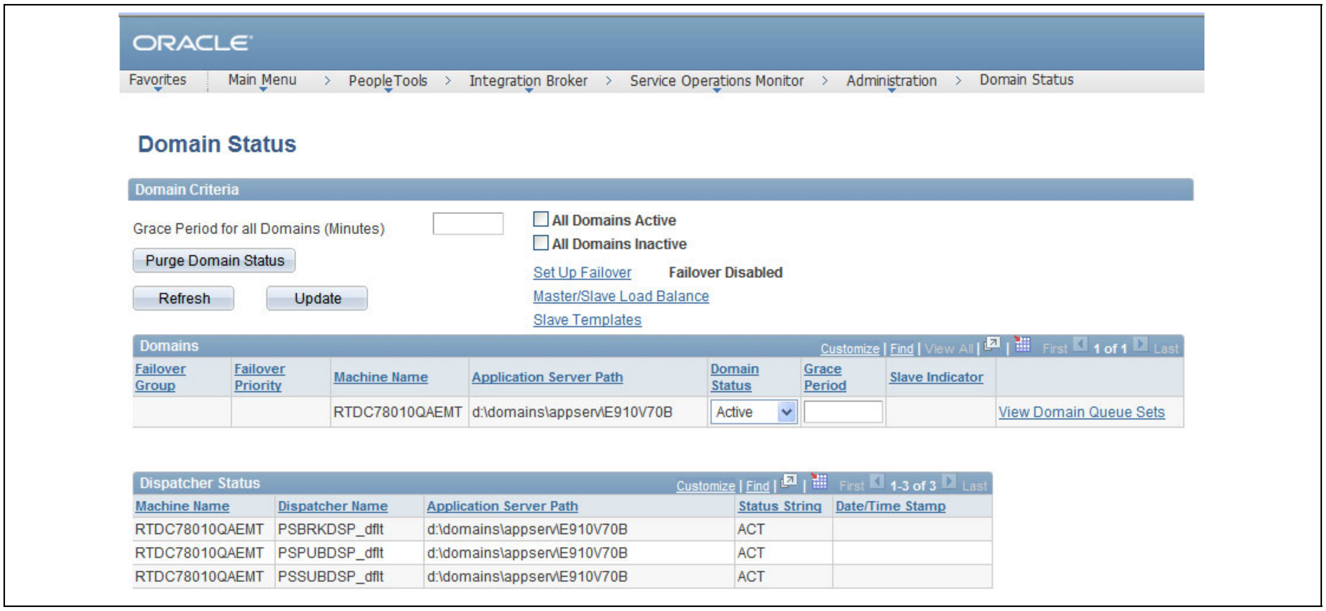
PSADMIN Quick-configure menu page

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

To activate the domain:

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

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



Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. Search for your domain.
4. On the Domain Status page, in the Domain Status field, select *Active* from the drop-down list box.
5. Click the Update button.

This completes the set up for PeopleSoft Asset Management Physical Inventory Web Services. For more information about the PeopleSoft Asset Management Physical Inventory cycle where service operations may be utilized, see the following:

See *PeopleSoft Enterprise Asset Management 9.1 PeopleBook,* "Performing Asset Physical Inventory."

CHAPTER 18

Integrating PeopleSoft Enterprise 9.1 IT Asset Management for Brazil with Network Inventory Discovery Systems

This chapter discusses:

- Understanding PeopleSoft 9.1 IT Asset Management for Brazil and Network Inventory Discovery Systems Integration
- Configuring the Local Gateway
- Configuring the Inbound Nodes
- Activating Service Operations
- Managing Queue Status
- Activating the Domain for Asynchronous Messaging

Understanding PeopleSoft 9.1 IT Asset Management for Brazil and Network Inventory Discovery Systems Integration

PeopleSoft 9.1 IT Asset Management for Brazil integrates with additional component (third-party) Network Inventory Discovery Systems to provide the following functionality:

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

See "Configuring the PeopleSoft Enterprise 9.1 IT Asset Management for Brazil with Network Discovery Systems."

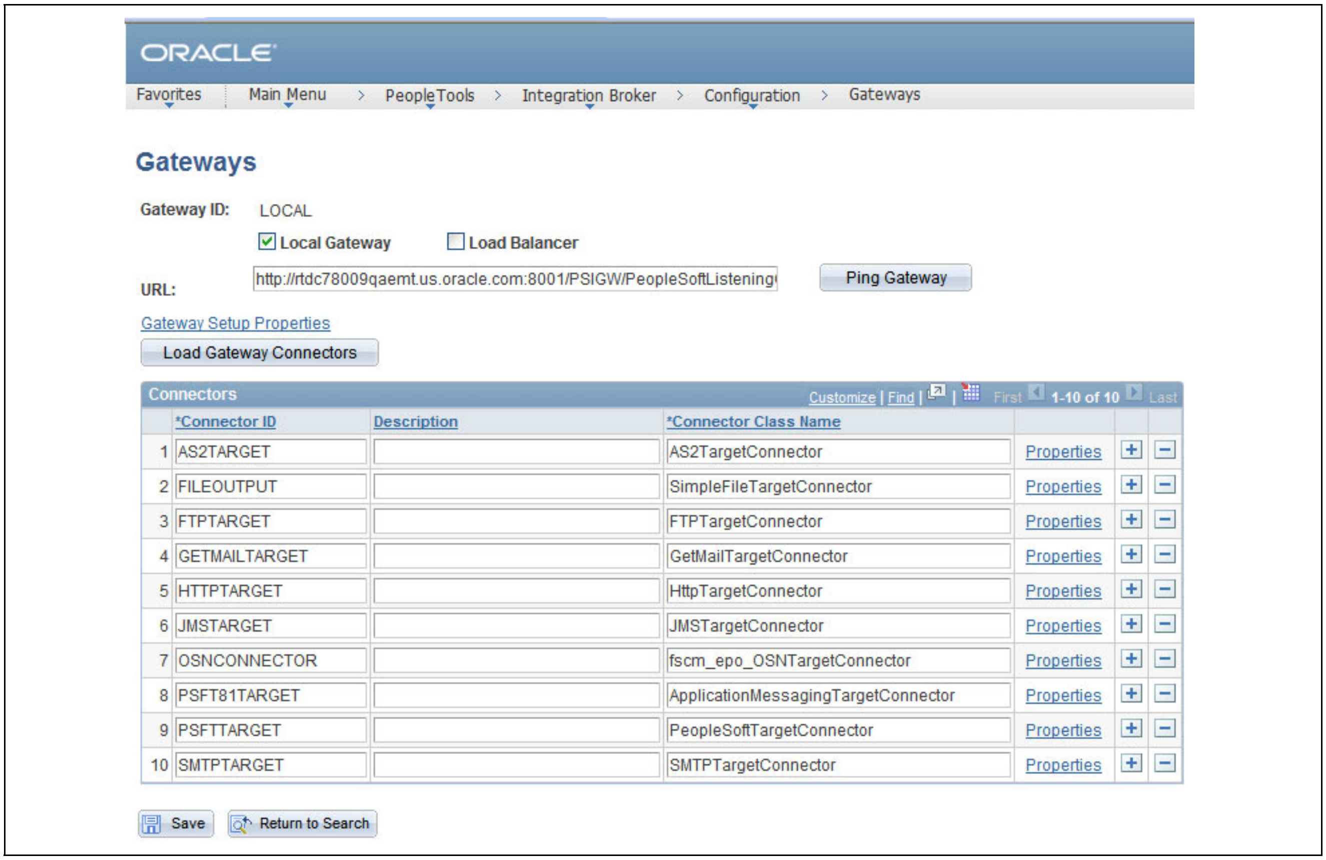
Task 18-1: Configuring the Local Gateway

To configure the local gateway:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.

2. Click Search. The Gateways page for the local gateway automatically appears by default.
3. On the Gateways page, in the URL field, enter *http://<WEBSRV:PORT>/PSIGW /PeopleSoftListeningConnector*.
4. Click the Load Gateway Connectors button.
5. Click Save.

   This ensures that all of the the existing connectors install on the gateway, as shown in the following example:



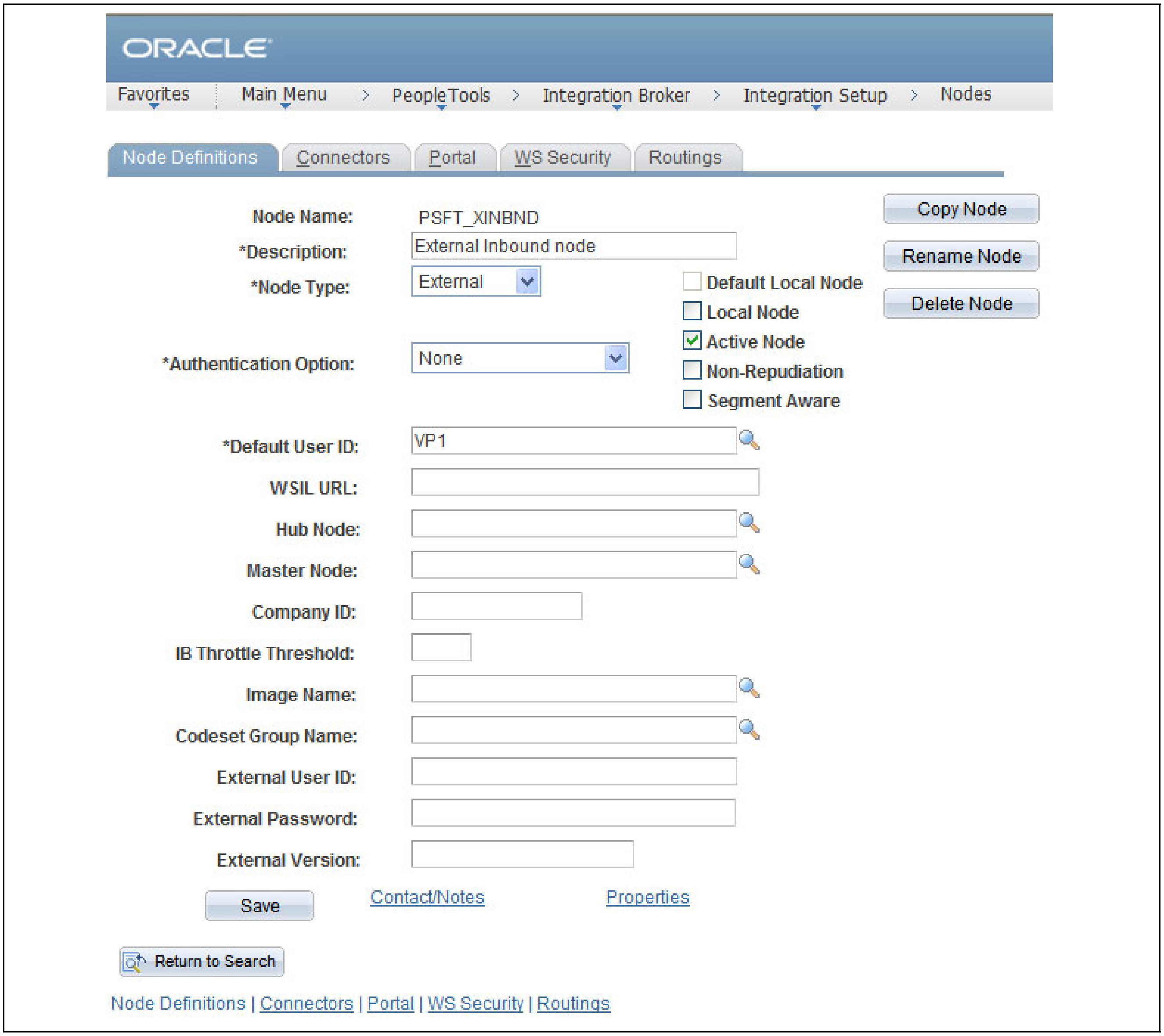
Gateways page

Task 18-2: Configuring the Inbound Nodes

To configure the inbound nodes:

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

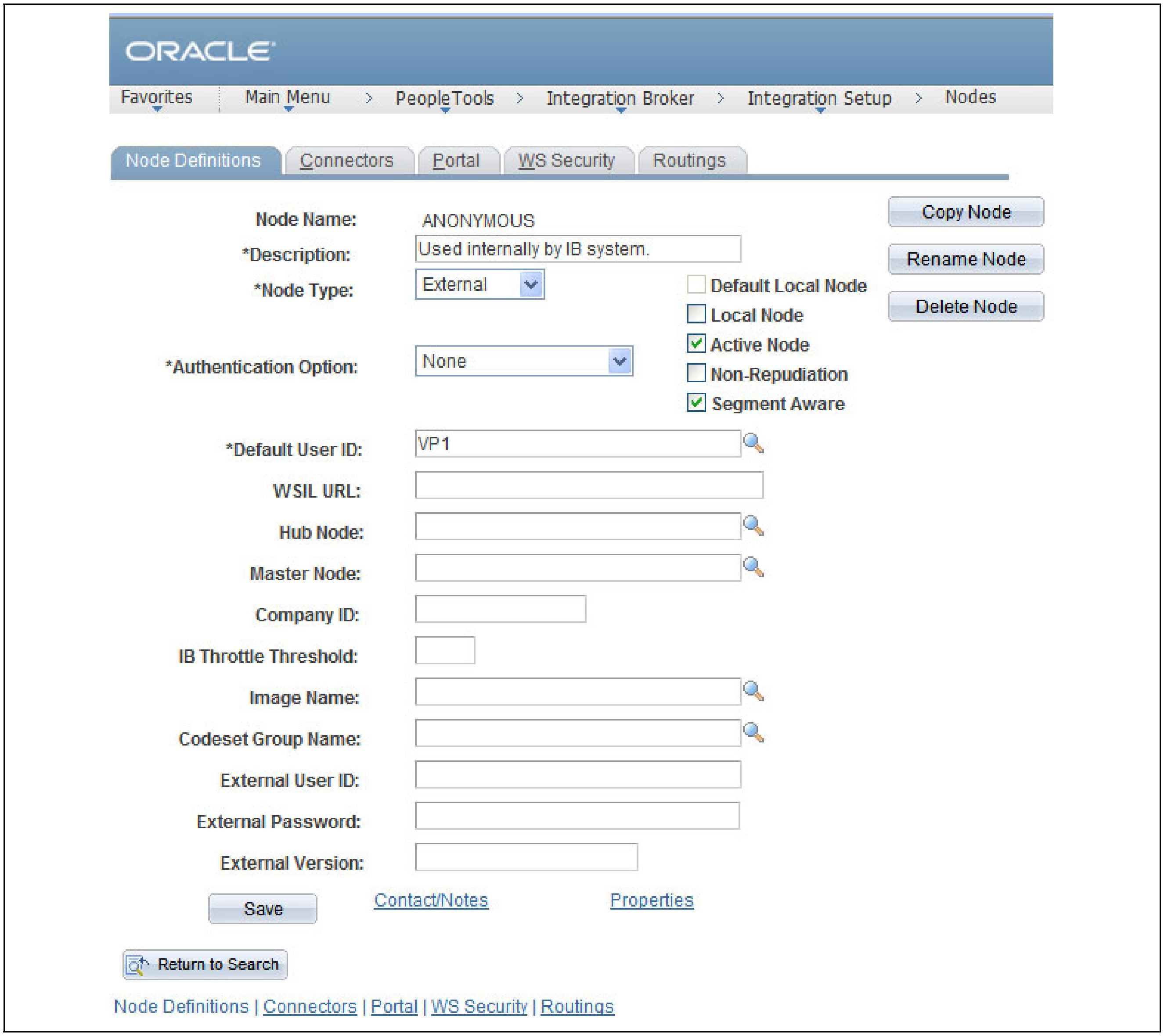
   The Node Definitions page appears, as shown in the following example:



Node Definitions page for PSFT_XINBND

3. On the Node Definitions page, in the Default User ID field, enter a value for the user that will be submitting the PROCESS_DISCOVERYDATA Service Operation into ITAM for the PSFT_XINBND node.
4. Click Save, and then click the Return to Search button.
5. On the Nodes search page, search for and select the node name *ANONYMOUS.*

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



Node Definitions page for ANONYMOUS

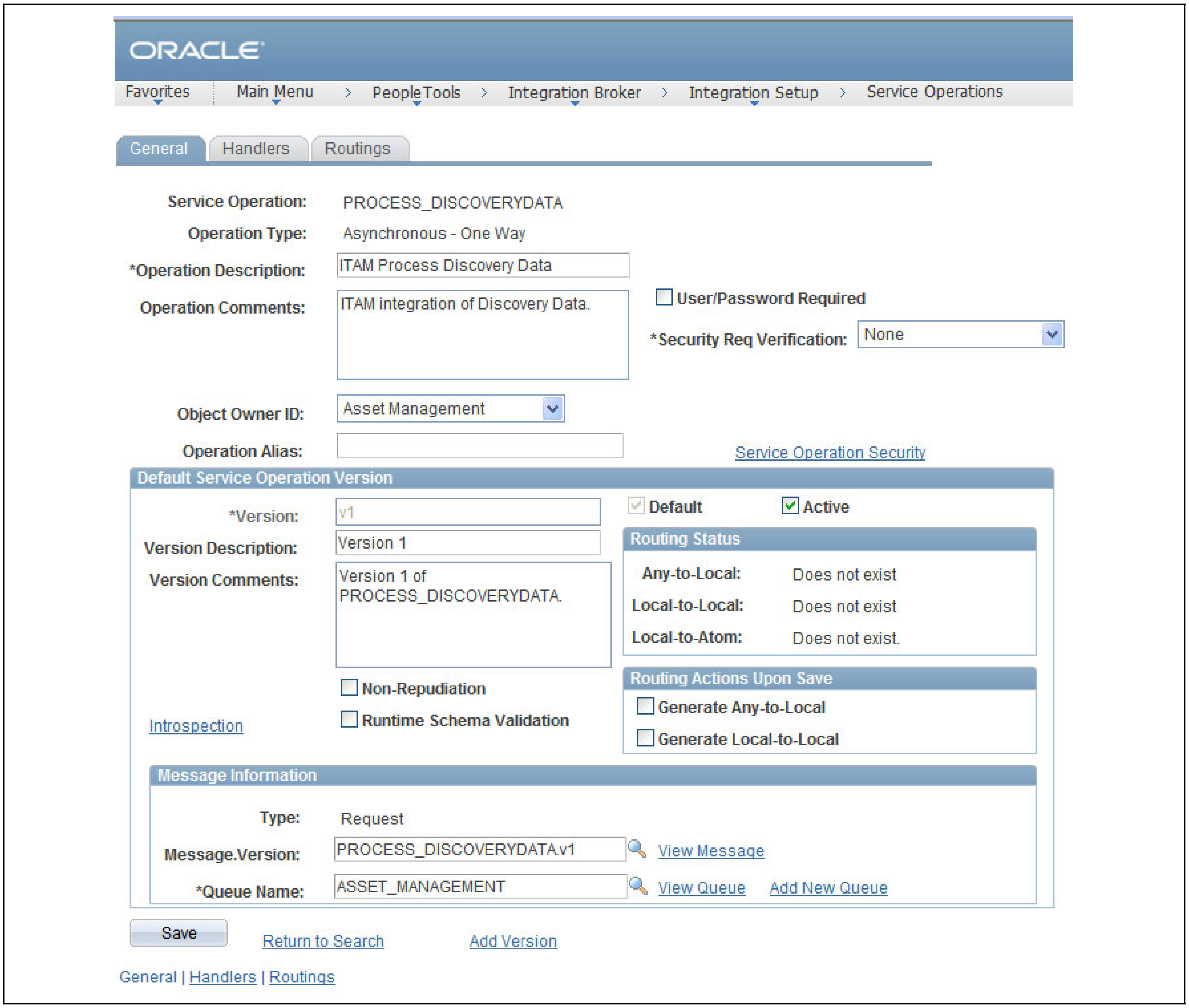
6. On the Node Definitions page, in the Default User ID field, enter a value for the user that will be submitting the PROCESS_DISCOVERYDATA Service Operation into ITAM for the ANONYMOUS node.
7. Click Save.

Task 18-3: Activating Service Operations

To activate service operations:

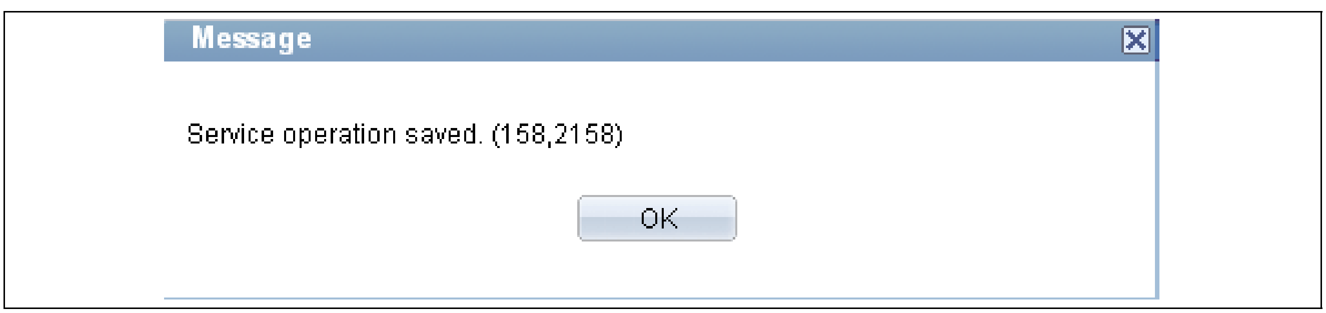
1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operations search page, search for and select the service name *PROCESS_DISCOVERYDATA*.

   The Service Operations - General page appears, as shown in the following example:



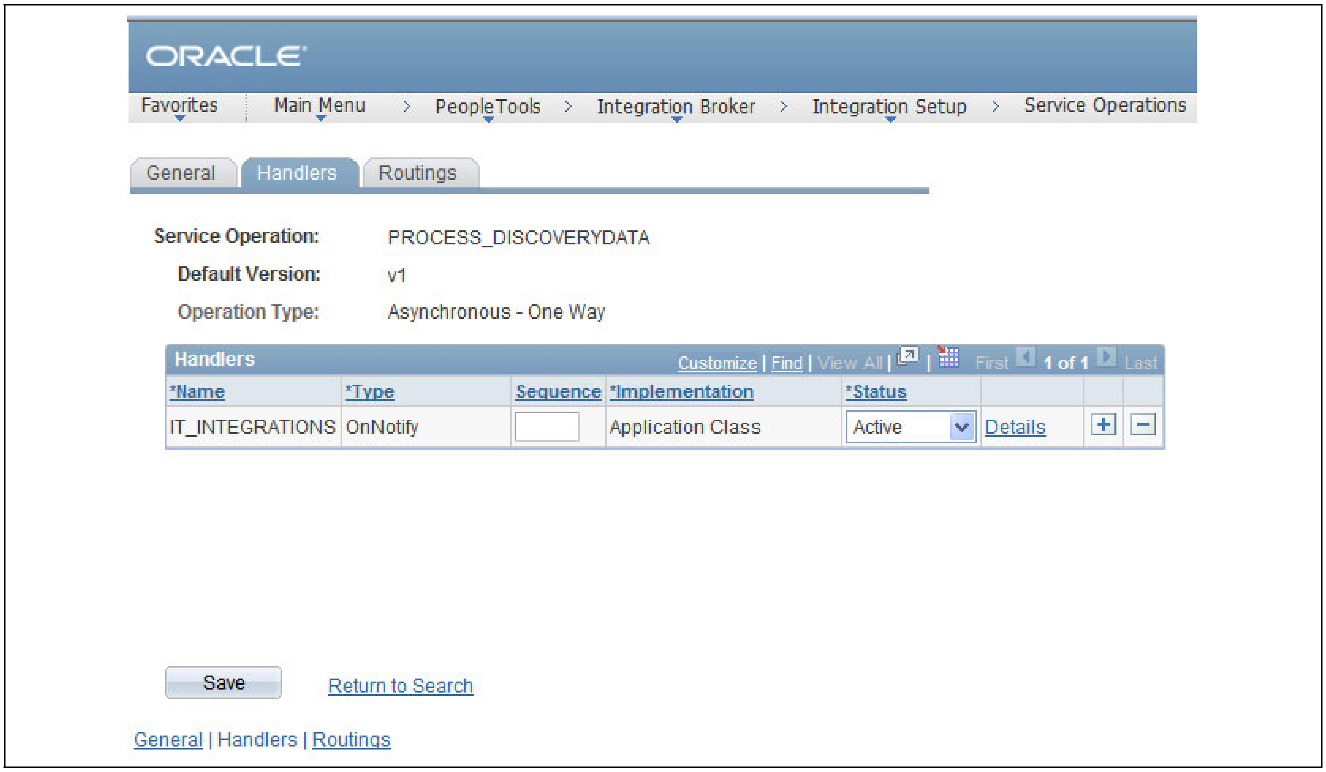
Service Operations: General page

3. On the General page, verify that the Active check box is selected.
4. Click Save.
5. The “Service Operation saved” message displays, as shown in the following example:



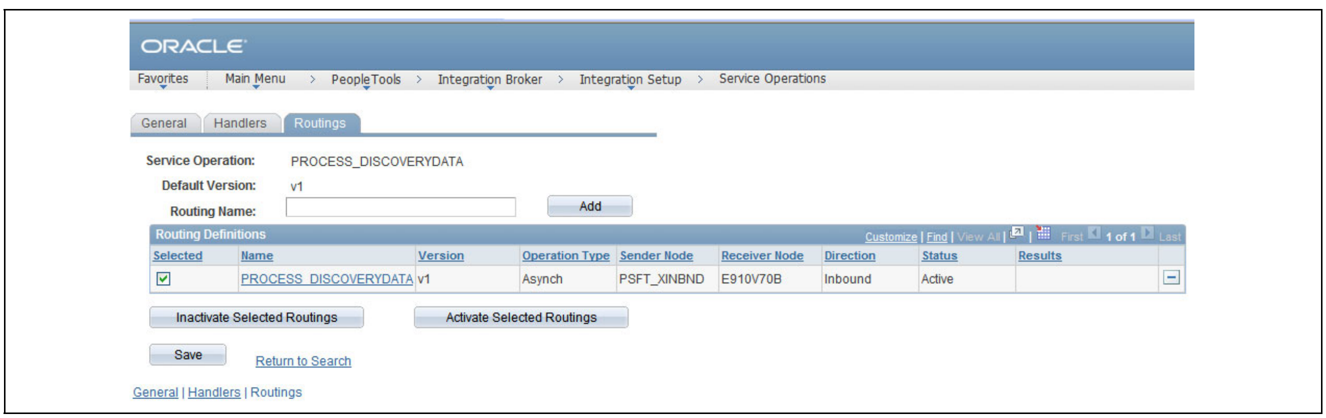
Service Operation: Saved Message

6. Click OK.
7. Select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations: Handlers page

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



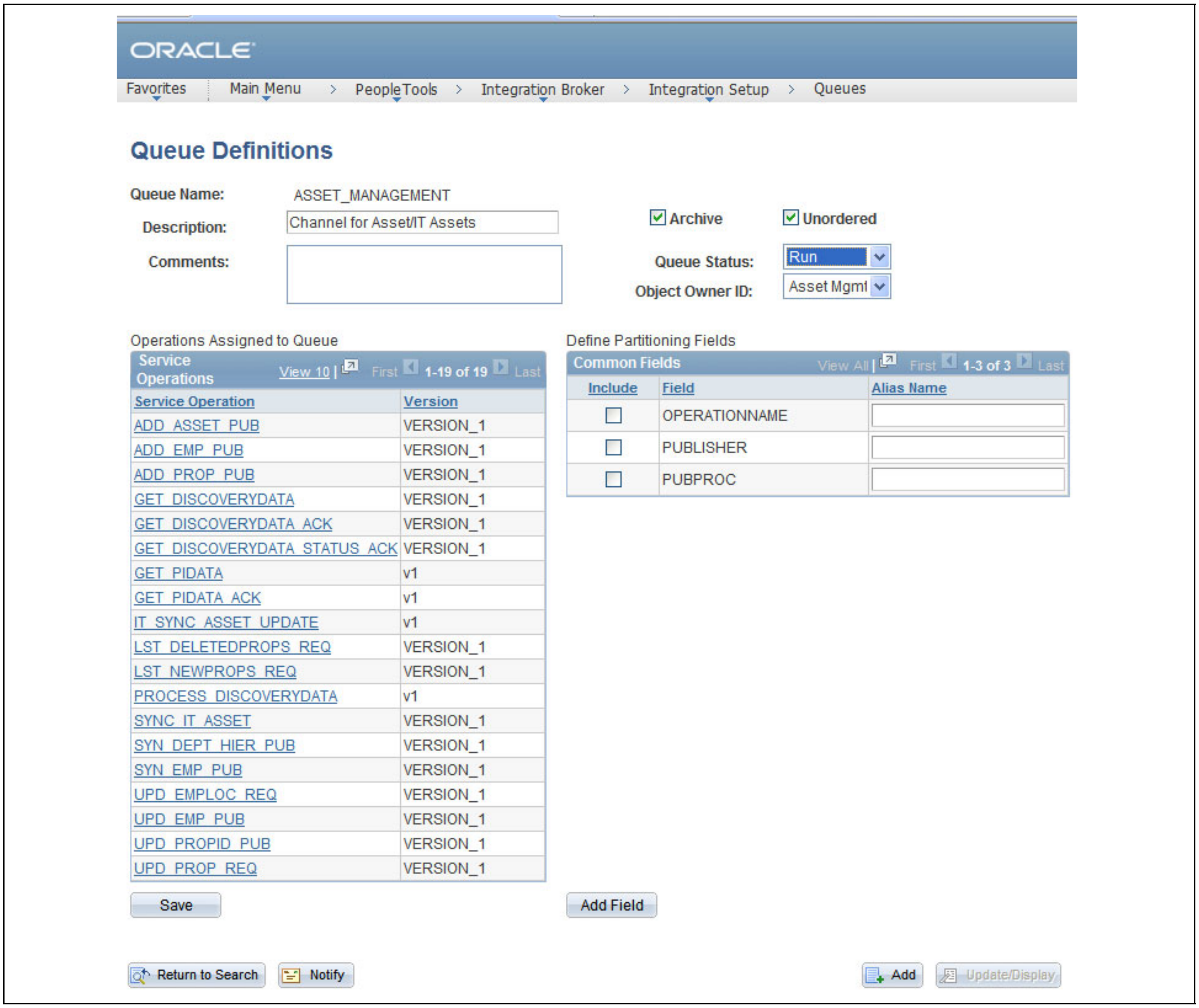
Service Operations: Routings page

11. On the Routings page, select the routing that you want to activate.
12. Click the Activate Selected Routings button.
13. Click Save.

Task 18-4: Managing Queue Status

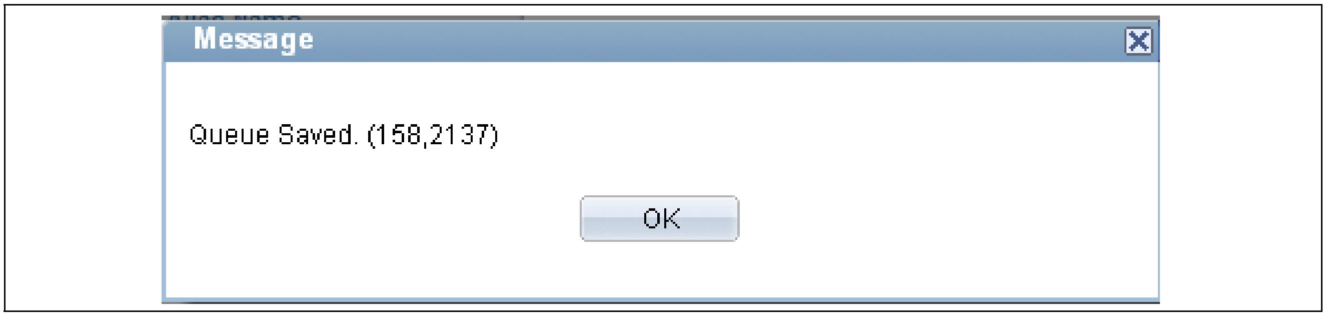
To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name *ASSET_MANAGEMENT*.
3. On the Queue Definitions page, verify that the Queue Status is set to *Run*.
4. If the Queue Status is *Paused*, select *Run* from the Queue Status drop-down list box, as shown in the following example:



Queue Definition

5. Click Save.
6. The "Queue Saved" message displays, as shown in the following example:



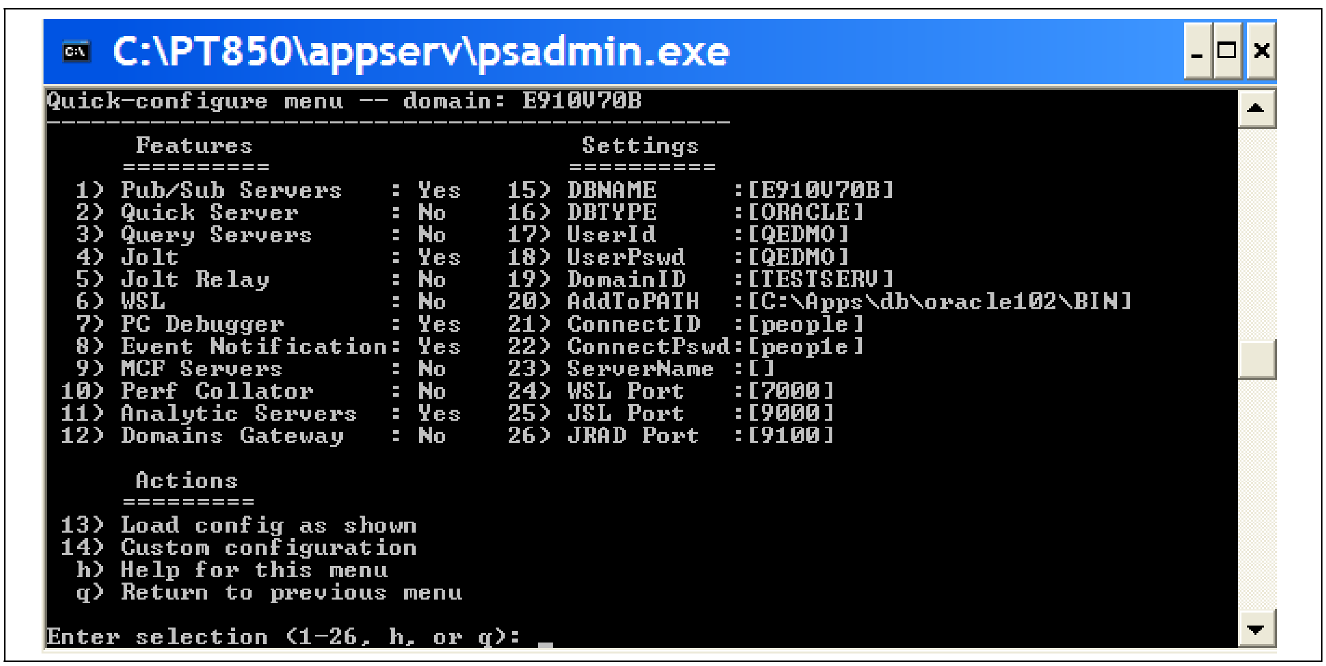
Queue Saved message

7. Click OK.

Task 18-5: Activating the 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 in the following example:



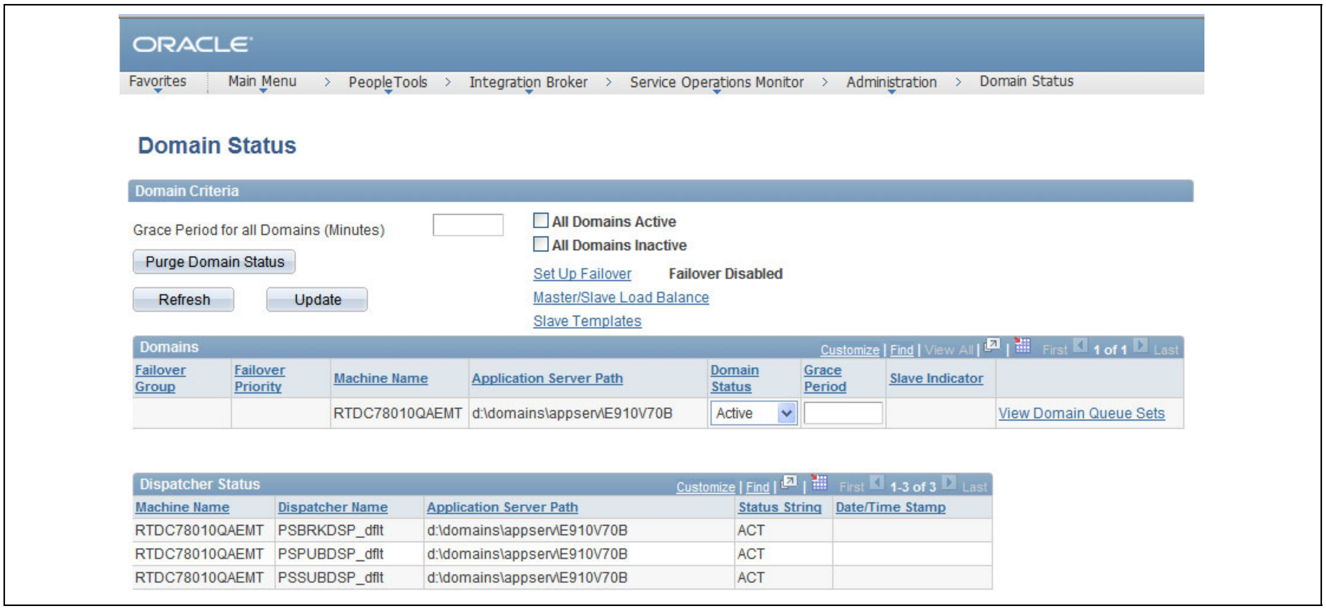
PSADMIN page

Note. PSADMIN configuration supports asynchronous messaging. After you start your application server you see two new processes—one for Message Handler, and one for Message Dispatcher.

After configuring your application server, you need to activate your domain through PeopleSoft Pure Internet Architecture to ensure that the Handler and Dispatcher pick up your asynchronous messages.

To activate the domain:

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



Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. Search for your domain/machine name and in the Domain Status field, select *Active* from the drop-down list box.
4. Click the Update button.

This completes the set up for PeopleSoft Asset Management with Network Inventory Discovery Systems. For more information about this integration, see the following:

See *PeopleSoft Enterprise Asset Management 9.1 PeopleBook,* "Working with the IT Asset Inventory Tool."

CHAPTER 19

Part III: Installing PeopleSoft Enterprise SCM Applications for Brazil

Understanding Part III

This section includes:

- Installing PeopleSoft Enterprise 9.1 eProcurement
- Configuring eMail URLS in PeopleSoft SCM Applications
- Setting Up PeopleSoft Enterprise 9.1 Supplier Contract Management
- Setting Up PeopleSoft SCM Pagelets
- Granting Access to Navigation Pages in PeopleSoft SCM
- Accessing PeopleSoft SCM Applications in PeopleSoft Enterprise 9.1 Portal Solutions

CHAPTER 20

Installing PeopleSoft Enterprise 9.1 eProcurement for Brazil

Understanding PeopleSoft Enterprise eProcurement 9.1 for Brazil

PeopleSoft eProcurement for Brazil 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 that you are using for the installation.

Task 20-1: Installing eProcurement CUP Item Export

When you install the PeopleSoft Financials/Supply Chain Management (FSCM) application, the system downloads the CUP (catalog update process) Export setup program on your workstation.

To install PeopleSoft eProcurement CUP Item Export:

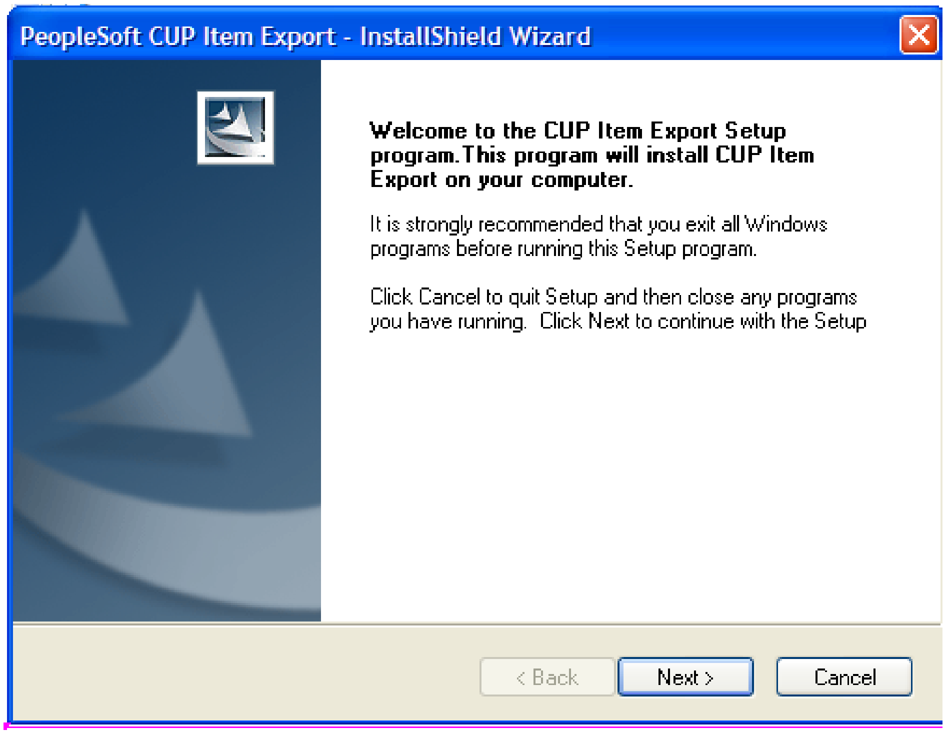
The installation of the PeopleSoft FSCM application CD-ROM downloads the eProcurement CUP setup to the following directory path on your local drive:

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

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

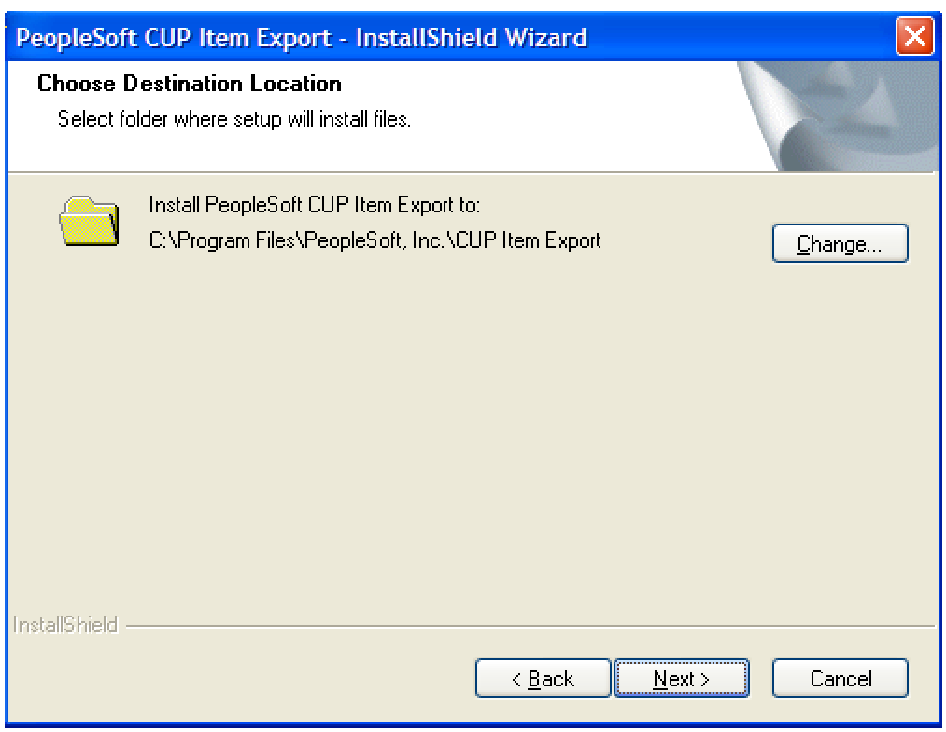
1. Double click Setup.exe.

   The PeopleSoft CUP Item Export - Welcome page appears, as shown in the following example:



CUP Item Export Welcome page

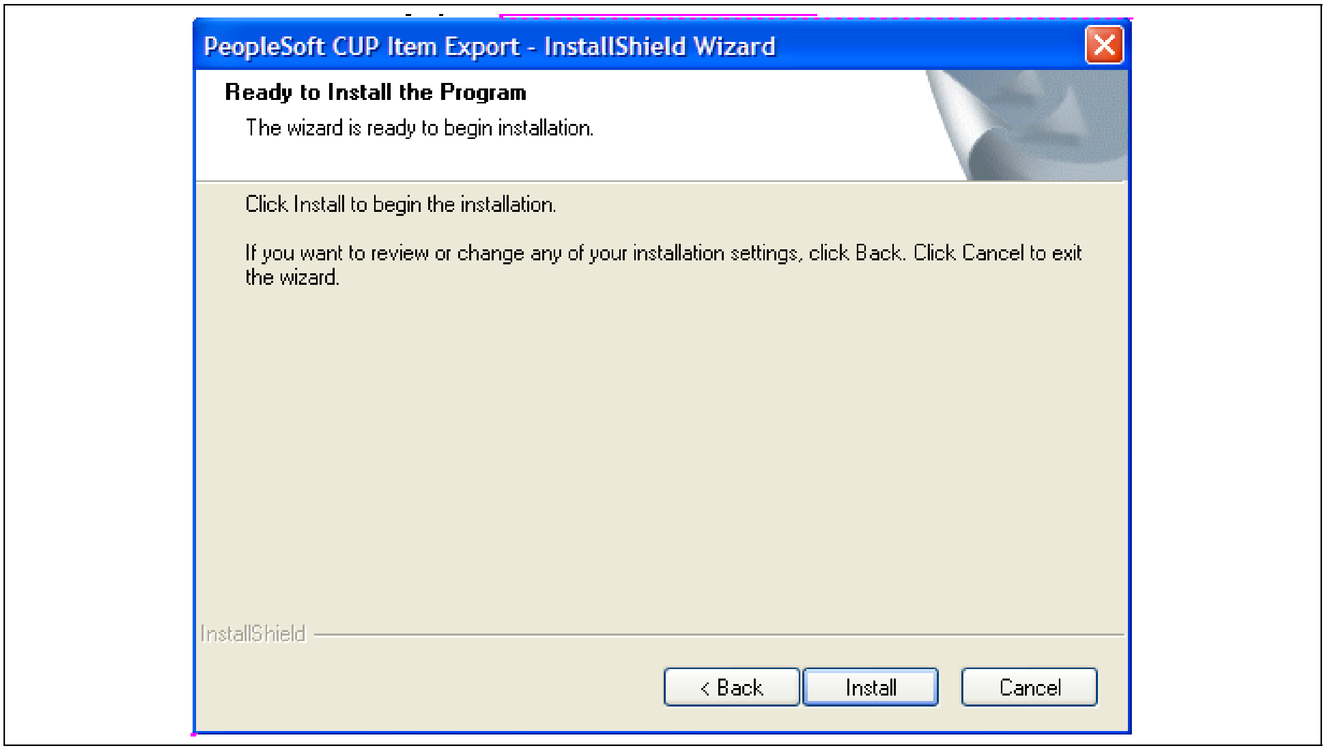
2. Click Next to access the Choose Destination Location page, as shown in the following example:



Choose Destination Location page

The Choose Destination Location page 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.

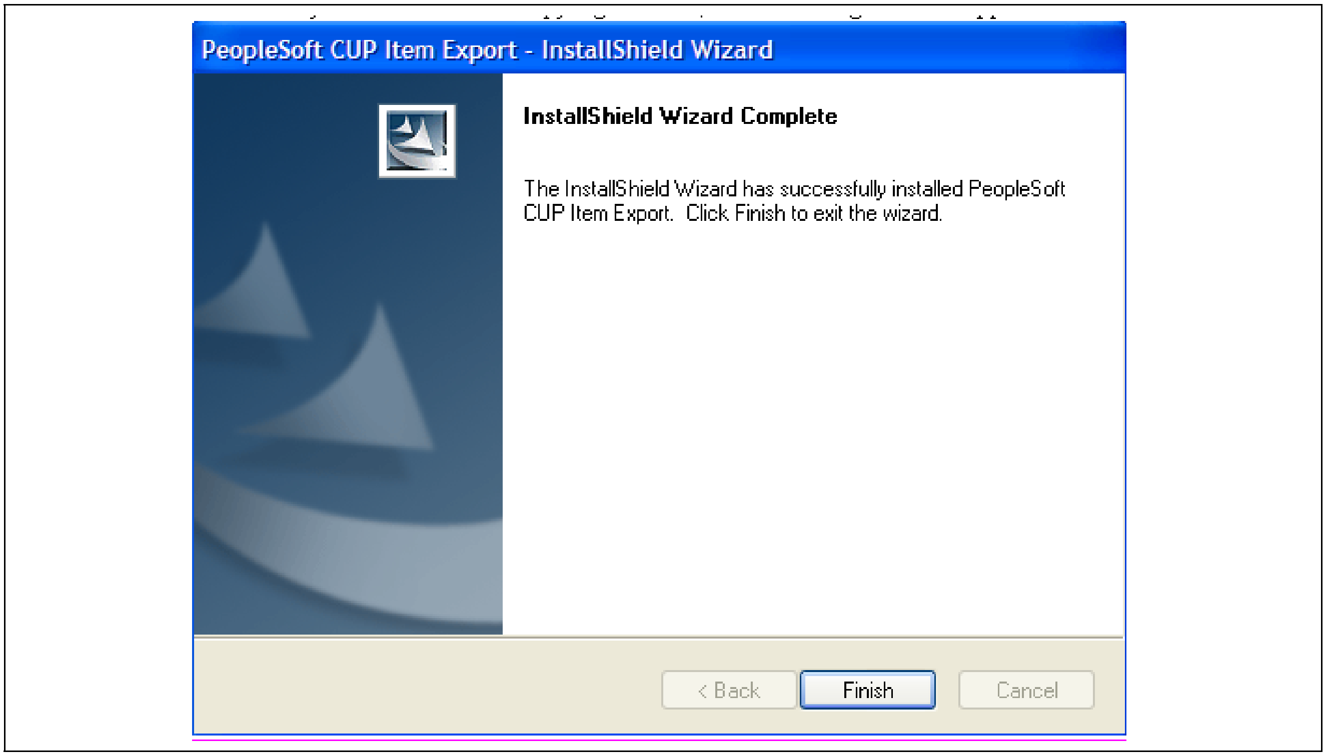
3. Click Next to display the Ready to Install the Program page, as shown in the following example:



Ready to Install the Program page

Click Install to start copying files.

After the system finishes copying the files, the PeopleSoft InstallShield Wizard Complete page appears, as shown in the following example:



InstallShield Wizard Complete page

4. Click Finish

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

CHAPTER 21

Configuring eMail URLS in PeopleSoft SCM Applications for Brazil

This chapter discusses:

- Understanding eMail Configuration for Brazil
- Configuring eMail URLs for Item Loader Exceptions
- Configuring eMail URLs for Supplier Facing Applications
- Configuring eMail URLs for eBill Payment

Understanding eMail Configuration for Brazil

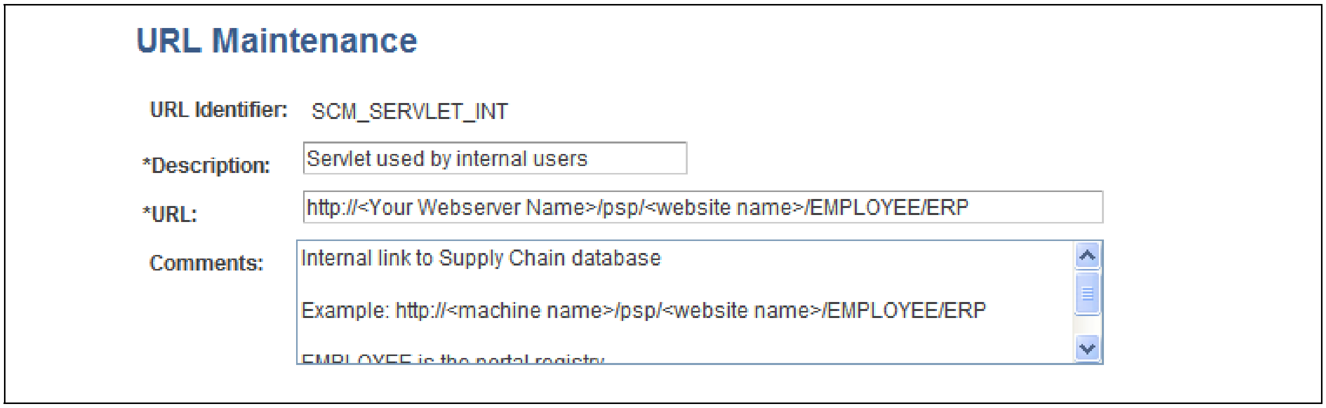
Some products in PeopleSoft Supply Chain Management (SCM) for Brazil can send out email notifications that contain web addresses (URLs) to enable your employees and external parties to link back to your website. For emails to contain the correct embedded URLs to PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft eProcurement pages, you need to edit the URL *SCM_SERVLET_INT*.

Task 21-1: Configuring eMail URLs for Item Loader Exceptions

You must modify SCM_SERVLET_INT to point to an internal server that is used to access the PeopleSoft SCM database. This URL is used to create standard PeopleSoft Pure Internet Architecture links for internal users, such as employees to access pertinent components and pages.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. Search for the URL identifier *SCM_SERVLET_INT*.
3. Modify the URL to point to an internal server to access the supply chain database, as shown in the following example:



URL Maintenance page for SCM_SERVLET_INT

4. Click Save.

Task 21-2: Configuring eMail URLs for Supplier Facing Applications

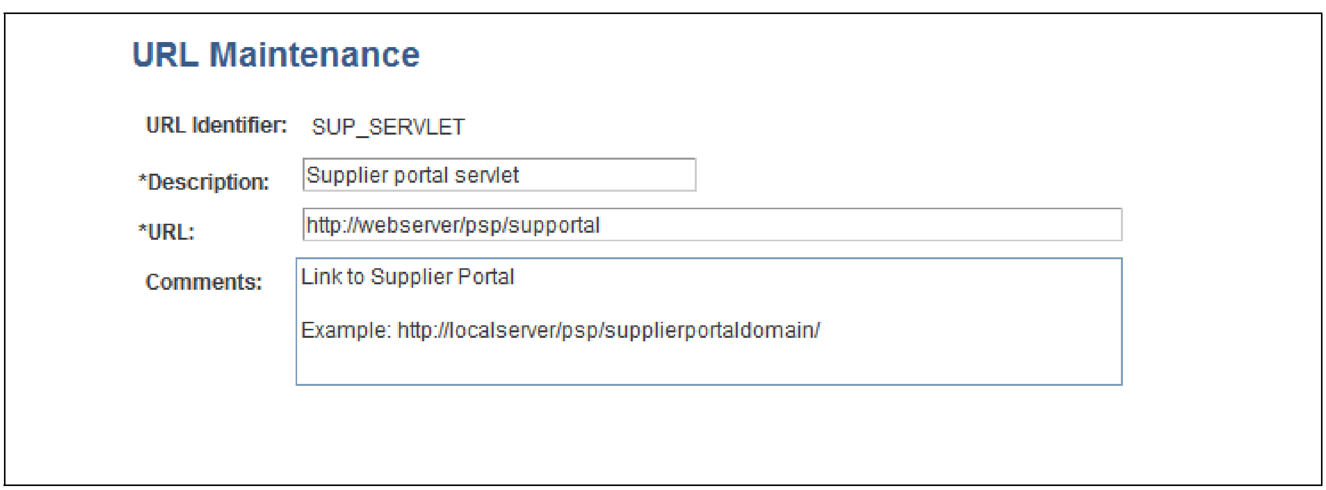
The information in this section applies to PeopleSoft eSupplier Connection, PeopleSoft Collaborative Supply Management, PeopleSoft Supplier Contract Management, PeopleSoft Strategic Sourcing, and PeopleSoft Services Procurement.

You need to modify EMP_SERVLET and SUP_SERVLET to point to the correct servers used to access the PeopleSoft SCM database. These are necessary when not using an Enterprise Porta,l as there is no other way to identify the different webservers that are used for the Employee or Supplier side.

To set up these URLs:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. Search for the URL identifier *SUP_SERVLET*.
3. Modify the URL to point to an EXTERNAL server to access the supply chain database.

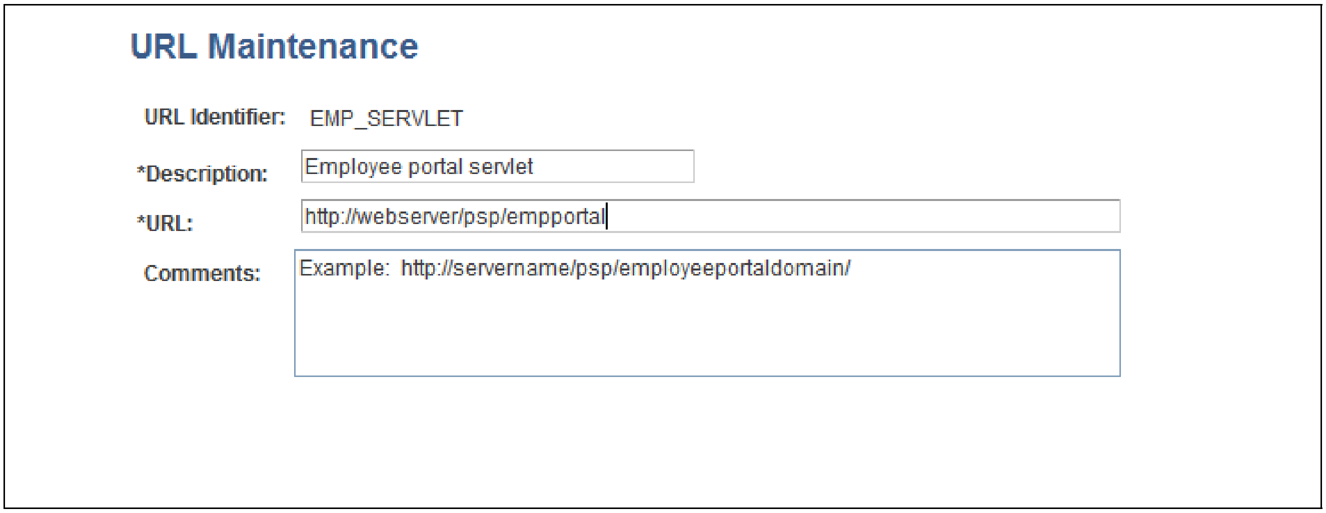
   That is, the server that the suppliers use to log onto the SUPPLIER registry, as shown in the following example:



URL Maintenance page for SUP_SERVLET

4. Click Save.
5. Search for the URL identifier *EMP_SERVLET*.
6. Modify the URL to point to an INTERNAL server to access the supply chain database.

   That is, the server that the employees use to log onto the EMPLOYEE registry, as shown in the following example:



URL Maintenance page for EMP_SERVLET

7. Click Save.

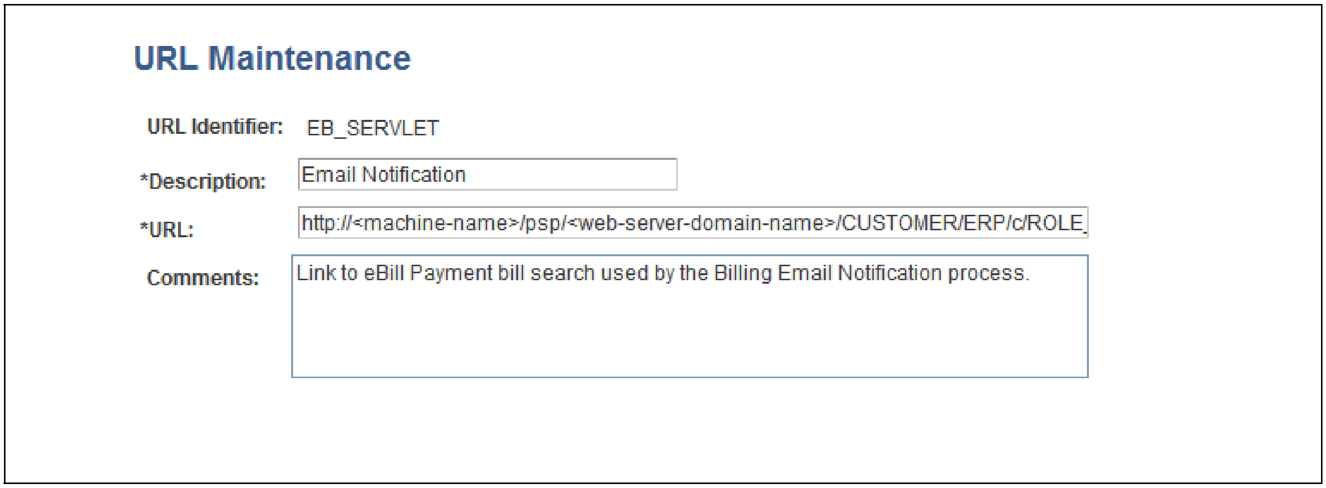
Task 21-3: Configuring eMail URLs for eBill Payment

You need to modify the EB_SERVLET to point to the correct server used to access the PeopleSoft SCM 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. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. Search for the URL identifier *EB_SERVLET*.
3. Modify the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain database.

   That is, the server that your customers use to log onto the CUSTOMER registry, as shown in the following example:



URL Maintenance page for EB_SERVLET

4. Click Save.

CHAPTER 22

Setting Up PeopleSoft Enterprise 9.1 Supplier Contract Management for Brazil

Understanding the PeopleSoft Enterprise 9.1 Supplier Contract Management Setup for Brazil

Only perform this task if you use PeopleSoft Supplier Contract Management for Brazil. For complete installation of Supplier Contracts, refer to the *PeopleSoft Enterprise Supplier Contract Management PeopleBook*.

To use PeopleSoft Supplier Contract Management you must, at a minimum, set up a database or FTP file server and have either Microsoft Word 2003 Professional or Word 2007 installed on at least one client. Refer to the section *Setting Up Supplier Contract Attachment FTP Servers and Directories* in the following reference:

See *PeopleSoft Enterprise Supplier Contract Management 9.1 PeopleBook,* "Setting Up PeopleSoft Supplier Contract Management."

Further setup is detailed in the same chapter of the PeopleSoft Enterprise Supplier Contract Management 9.1 PeopleBook for the following:

- Setup of a Microsoft Word template.

  See Defining Document Templates and Styles.

- Optional setup for individual clients to allow certain users to look up clauses and bind variables in the PeopleSoft database from within Word 2003 using Microsoft Research task pane functionality.

  See Setting Up PeopleSoft Integration Broker and Microsoft Word Configuration Files, Installing and Configuring Microsoft Word Components on Workstations.

- Optional setup to allow users to do server side compares of Word documents, and optional dispatch of contracts to suppliers in a .doc or .pdf format (versus the default .xml format).

  See Defining Installation Options for Supplier Contract Management.

- Optional installation setup for Verity.

  See Defining Installation Options for Supplier Contract Management.

- Optional installation setup for workflow.

  See 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 Setting Up PeopleSoft Supplier Contract Management.

- Optional installation setup for Syndication.

- Optional setup that enables documents to use digital signatures (PDF or Word 2007).

  See Defining Installation Options for Supplier Contract Management.

CHAPTER 23

Setting Up PeopleSoft Supply Chain Management Pagelets for Brazil

This chapter discusses:

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

Task 23-1: Accessing Pagelets

You can access pagelets within the PeopleSoft 9.1 Supply Chain Management application databases. Scripts must be applied to your database to allow access to the pagelet configuration homepage.

Note. You must complete the following steps 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 PeopleSoft Data Mover to run the `PORTAL_HP_PERS.DMS` script. To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the `PORTAL_ADD_ROLE.DMS` script. 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 23-2: Enabling Pagelet Creation and Access with Portal Utilities

Use PeopleSoft Data Mover to run the `EOPP_PORTAL_PACK.DMS` script located in <PS_HOME>\scripts. This script enables you to create and view 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.

CHAPTER 24

Granting Access to Navigation Pages in PeopleSoft SCM for Brazil

Task 24-1: Adding User Roles to All User IDs

To access the navigation pages, security to the Navigation Page IScripts must be granted to all users. To add the EOPP_USER role to all users, use PeopleSoft 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 25

Accessing PeopleSoft Financials, ESA, and SCM Applications for Brazil in PeopleSoft Enterprise 9.1 Portal Solutions

Task 25-1: Accessing Applications

Only perform this task if you use the PeopleSoft Enterprise Portal product and want 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 *PeopleSoft Enterprise Portal Solutions 9.1 Installation* documentation on My Oracle Support. 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.

See *PeopleSoft Enterprise Portal Solutions 9.1 Installation.*

APPENDIX A

Configuring the PeopleSoft Enterprise 9.1 Asset Management for Brazil with eCenterOne Space Management Solution

Use these values when integrating PeopleSoft Enterprise applications for Brazil with eCenterOne Space Management.

The following table lists eCenterOne Connector Properties (N/A = Not Applicable):

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

The following table lists the 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.

The following table lists Properties for Asynchronous Node Transactions:

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

The following table lists Properties for Synchronous Node Transactions:

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

The following table lists the PeopleSoft-delivered Transactions for PSFT_XOUTBND RELATIONSHIP (N/A = Not Applicable):

Initial Node	Transaction Type	Request Message Name	Request Transformation	Response Transformation
PSFT_XOUTBND	OA	ADD_EMP_PUB	RE_HRADD_XFM	N/A
PSFT_XOUTBND	OA	ADD_PROP_PUB	RE_PRADD_XFM	N/A
PSFT_XOUTBND	OA	SYN_DEPT_HIER_PUB	RE_DEPT_XFM	N/A
PSFT_XOUTBND	OA	SYN_EMP_PUB	RE_HRSYN_XFM	N/A
PSFT_XOUTBND	OA	UPD_EMP_PUB	RE_HRUPD_XFM	N/A
PSFT_XOUTBND	OA	UPD_PROPID_PUB	RE_PRPID_XFM	N/A
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

APPENDIX B

Configuring the PeopleSoft Enterprise 9.1 IT Asset Management for Brazil with Network Discovery Systems

Use these values when integrating PeopleSoft Enterprise 9.1 IT Asset Management for Brazil with Network Discovery Systems.

The following table lists HTTPTARGET Connector Properties:

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

The following table lists 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

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