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PeopleSoft Portal Solutions 9.1 Feature Pack 1 Installation Guide

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PeopleSoft Portal Solutions 9.1 Feature Pack 1
Installation Guide
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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 PeopleTools are provided in PeopleSoft PeopleTools installation guides. Application-specific installation instructions are provided in a separate document for the PeopleSoft application. For instance, if you are installing Oracle's PeopleSoft Customer Relationship Management (CRM), you need both the PeopleSoft PeopleTools installation guide and the additional instructions provided for installing PeopleSoft CRM.

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

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 and Visual Cues

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 Customer Relationship Management

- Oracle's PeopleSoft Financial Management

- Oracle's PeopleSoft 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 Portal Solutions

- Oracle's PeopleSoft Enterprise Staffing Front Office

- Oracle's PeopleSoft Supply Chain Management

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

See http://www.oracle.com/us/products/applications/peoplesoft-enterprise/index.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:

- PeopleTools PeopleBook: Getting Started with PeopleTools for your release. This documentation provides a high-level introduction to PeopleSoft PeopleTools technology and usage.

- PeopleSoft 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, PeopleSoft 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

Understanding PeopleSoft Portal Solutions

This chapter discusses:

• Understanding PeopleSoft Portal Solutions vs. the Applications Portal Product

• Understanding Portal Host and Content Provider Databases

• Understanding PeopleSoft Portal Solutions Products

Note. Before you begin the installation of any PeopleSoft Portal Solutions product, ensure that you check My Oracle Support for any updates and fixes that are required for installation.

Note. References in this documentation to PeopleSoft PeopleTools 8.4x refer to the current PeopleSoft PeopleTools release level; for example, PeopleSoft PeopleTools 8.52 is part of the PeopleSoft PeopleTools 8.4x codeline.

Understanding PeopleSoft Portal Solutions vs. the Applications Portal Product

Oracle's PeopleSoft Portal Solutions consist of the Applications Portal and Internal Controls Enforcer. The PeopleSoft Portal Solutions database can contain one or multiple PeopleSoft portals. For example, if you are using the EMPLOYEE portal and the SUPPLIER portal, you can install both of these portals on a single PeopleSoft Portal Solutions database.

The PeopleSoft Applications Portal product consists of portal features, pagelets, and applications that extend the PeopleSoft PeopleTools portal technology. The PeopleSoft Applications Portal product is only supported in the PeopleSoft Portal Solutions database. A portal pack consists of application-specific pagelets.

Understanding Portal Host and Content Provider Databases

The database that hosts your PeopleSoft Applications Portal is referred to as the *portal host* database and is the only supported portal host database. PeopleSoft application databases that contain the transaction content are referred to as *content provider* databases.

Understanding PeopleSoft Portal Solutions Products

The following table lists the PeopleSoft Portal Solutions products, their associated application databases, and applicable portal definitions (EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER).

PeopleSoft Portal Solutions Products	PeopleSoft Application Databases	EMPLOYEE	CUSTOMER	SUPPLIER	PARTNER
Applications Portal	Portal Solutions	X	X	X	
CRM Portal Pack	Customer Relationship Management	X	X		X
EPM Portal Pack	Enterprise Performance Management	X			
ESA Portal Pack	Financials Supply Chain Management	X			
Financials Portal Pack	Financials Supply Chain Management	X	X		
Supply Chain Portal Pack	Financials Supply Chain Management	X	X	X	
HRMS Portal Pack	Human Resource Management Systems	X			
Internal Controls Enforcer	Enterprise Performance Management	X			

CHAPTER 2

Installing PeopleSoft Portal Solutions

This chapter discusses:

- Understanding PeopleSoft Portal Solutions Installation
- Prerequisites for Internet Connectivity
- Prerequisites
- Using Oracle Software Delivery Cloud to Obtain Installation Files
- Installing PeopleSoft PeopleTools
- Installing Application Files to the Custom PS_APP_HOME Location
- Installing PeopleSoft PeopleBooks
- Installing PeopleSoft Portal Solutions 9.1 Feature Pack 1
- Installing Multilingual PeopleSoft Portal Solutions 9.1 Feature Pack 1
- Installing the PeopleSoft Portal Solutions Database
- Setting Up the Application Server
- Setting Up the Process Scheduler
- Setting Up the Web Server
- Testing the PeopleSoft Portal Solutions Database Sign-On
- Setting the Default Portal Registry Definition
- Extending Directory Paths and Copying Folders
- Setting Up and Updating Menu Items and Tasks
- Setting the Content Management Storage Locations
- Configuring the Resource Finder Profile Page
- Updating PeopleSoft Applications Portal Options
- Removing Demo Portal Registry Data
- Cleaning Homepage Tab Definitions
- Configuring Integration Broker for Feed Publishing

Note. The database that hosts your PeopleSoft Portal Solutions product, also known as the *portal host* database, must be a PeopleSoft Portal Solutions database.

Understanding PeopleSoft Portal Solutions Installation

This section discusses:

• Understanding PeopleSoft Portal Registry Definitions

• Understanding Multilingual Portal Installation

Understanding PeopleSoft Portal Registry Definitions

Oracle's PeopleSoft applications that release on PeopleSoft PeopleTools 8.52 or higher are delivered with several portal registry definitions. PeopleSoft Portal Solutions 9.1 Feature Pack 1 supports the active use of multiple portal registries in a single PeopleSoft Portal Solutions database. Use the default portal registry when you sign on to the database from the browser.

Understanding Multilingual Portal Installation

You will obtain the multilingual files separately from the core PeopleSoft application on the Oracle Software Delivery Cloud website. It is very important that you install the multilingual files that correspond to the same version as the core application.

See Oracle Software Delivery Cloud, http://edelivery.oracle.com

Prerequisites for Internet Connectivity

As one of their primary functions, portals collect content from a variety of sources. Because most of the application processing takes place on the application server, it is important that this machine establishes connectivity to a variety of systems.

If you do not establish the following connectivity points before the PeopleSoft Portal Solution installation, the time necessary to complete a task may lengthen and may keep certain portal features from working properly.

PeopleSoft Applications Portal delivers a great deal of functionality that relates to internet-based content, for example, the Feed Reader pagelet. This functionality relies upon issuing HTTP requests by way of Integration Broker on the application server. The following provides some scenarios in which you can test HTTP requests and responses from your application server. Before you begin a PeopleSoft Portal Solutions installation, verify the following:

• From a browser on the application server, access an internet website such as http://www.oracle.com /applications/portals/enterprise/enterprise-portal.html. This should successfully display the corresponding web page.

• If a browser is not available on your application server (such as on some UNIX machines), you can try an alternative test by using TELNET to establish a connection to an external system. This should be done for both HTTP (for example, port 80) and SSL (for example, port 443).

   For example, you can use: *TELNET www.peoplesoft.com:80*

• Review your web configuration for the ports specified for HTTP and SSL.

   Note. This is not as reliable a test, because it does not actually test an HTTP request and response.

Prerequisites

The following requirements must be met before you install PeopleSoft Portal Solutions:

- The installation of the appropriate version of PeopleSoft PeopleTools.

    The PeopleSoft Portal Solutions database requires the installation of PeopleSoft PeopleTools 8.52.02 or higher.

- The availability of the appropriate resources for your PeopleSoft Portal Solutions demo database.

    The following table lists the minimum PeopleSoft Portal Solutions demo database size for each platform:

Platform	Minimum Database Size
DB2/UNIX - ANSI	3.9 GB
DB2/UNIX - Unicode	5.3 GB
DB2/zOS Non-Unicode	3.3 GB
DB2/zOS Unicode	3.5 GB
Microsoft SQL Server Non-Unicode	1.1 GB
Microsoft SQL Server- Unicode	1.1 GB
Oracle - ANSI/Unicode	4.6 GB

- Verity search engine.

    Several features in PeopleSoft Portal Solutions make use of Verity, a search engine product that delivers with PeopleSoft PeopleTools. For details and more information on the installation and configuration of Verity, consult the appropriate PeopleSoft PeopleTools documentation for your database platform.

    See PeopleTools: System and Server Administration PeopleBook, " Configuring Verity Search and Building Verity Search Indexes," for your current PeopleTools release.

Task 2-1: Using Oracle Software Delivery Cloud to Obtain Installation Files

Before beginning the installation, you should have obtained the PeopleSoft Portal 9.1 installation software by downloading the necessary zip files from the Oracle Software Delivery Cloud website. Use the documentation available on Oracle Software Delivery Cloud to be sure that you obtain all the zip files required for your environment.

This installation guide, and the Oracle Software Delivery Cloud website, refer to the zip files that you download as media packs.

See Oracle Software Delivery Cloud, http://edelivery.oracle.com

Task 2-2: Installing PeopleSoft PeopleTools

This section does not provide information on the installation of the PeopleSoft PeopleTools product.

See PeopleSoft PeopleTools Installation Guide, "Using the PeopleSoft Installer," for your database platform and for your current PeopleTools release.

Warning! You must maintain a separate *PS_HOME* directory for your PeopleSoft Portal Solutions database. Due to varying license codes, the installed PeopleSoft PeopleTools *PS_HOME* used by the PeopleSoft Portal Solutions database and the installed PeopleSoft PeopleTools *PS_HOME* used by any additional PeopleSoft Portal Solutions databases cannot be the same.

See PeopleTools: System and Server Administration PeopleBook, "Working with Server Domain Configurations", "Working with PS_APP_HOME," for your current PeopleTools release, to know more about the new alternate directory PS_APP_HOME.

See PeopleSoft PeopleTools Installation Guide, "Preparing for Installation", "Defining Installation Locations," for your database platform and for your current PeopleTools release.

Task 2-3: Installing Application Files to the Custom PS_APP_HOME Location

Beginning with PeopleSoft PeopleTools 8.52, you can elect to install your PeopleSoft application files into a custom location that is identified by the PS_APP_HOME environment variable.

You can continue to install applications into PS_HOME using the traditional approach, or you can install to the custom location PS_APP_HOME. Electing to continue using the traditional PS_HOME structure brings no impact to your implementation, and you can carry on the same as before. However, if you are seeking further modularity and more streamlined implementations, then installing your PeopleSoft application into a separate PS_APP_HOME location is an attractive alternative.

For more information about PS_APP_HOME and the corresponding instructions to configure and implement this option, you can refer to the following documentation that is available on My Oracle Support, the Oracle Technology Network and the Hosted PeopleBooks web sites:

See Oracle's PeopleSoft PeopleTools 8.52 Release Notes

See PeopleTools Installation Guide, for your database platform and for your current release of PeopleTools.

See PeopleTools: System and Server Administration PeopleBook , for your current release of PeopleTools.

Task 2-4: Installing PeopleSoft PeopleBooks

Oracle delivers PeopleSoft PeopleTools and every PeopleSoft application with PeopleSoft PeopleBooks. For the PeopleSoft Portal Solutions, there are PeopleSoft PeopleBooks that are written specifically about the PeopleSoft Portal Solutions features and functionality.

Note. This chapter does not provide information regarding the installation of PeopleSoft PeopleBooks.

See PeopleSoft PeopleTools Installation Guide, "Installing PeopleBooks," for your database platform and for your current release of PeopleTools.

Task 2-5: Installing PeopleSoft Portal Solutions 9.1 Feature Pack 1

To install PeopleSoft Portal Solutions 9.1 Feature Pack 1:

1. Download the Oracle Software Delivery Cloud zip file to a convenient directory on the machine that you are using for your PeopleSoft installation.

2. Unzip the files.

3. Locate the installation executable in the extracted root directory or the disk1 directory.

4. Run the setup (setup.exe) application from the root directory of the unzipped files.

   The PeopleSoft InstallShield Wizard Welcome page appears.

5. Review the PeopleSoft Installer Welcome page, and then click Next.

   The PeopleSoft License Agreement Terms page appears.

6. Review the license agreement. If you accept the license agreement terms, select the I accept the terms of the license agreement check box, and then click Next.

   The PeopleSoft License Code Details page appears.

7. Enter your PeopleSoft license code, and click Next.

   The PeopleSoft Select Database Platform option page appears.

8. Select the database platform that you want to use, and then click Next.

   The PeopleSoft Select Database Type option page appears.

9. Select the database type: *Non-Unicode Database* or *Unicode Database,* and then click Next.

   The PeopleSoft Select Server Types to Install option page appears.

10. Select the types of servers that you want to install, and then click Next.

    The PeopleSoft Select the Installation Directory option page appears.

11. Select the directory to which you want to install PeopleSoft Portal Solutions 9.1 Feature Pack 1.

    Click Browse to specify the server installation directory name, and then click Next.

    Note. The database server directory must be the *PS_HOME* directory of the installed PeopleSoft PeopleTools product for the PeopleSoft Portal Solutions database.

12. Select the PeopleSoft Applications Portal features that you want to install, and click Next.

    The PeopleSoft Confirmation page appears.

13. The confirmation page displays the installation options that you selected. Click Next to begin the installation.

    A progress bar displays to indicate the progress of the installation.

14. When the installation completes, click Finish to exit the PeopleSoft Installer.

Task 2-6: Installing Multilingual PeopleSoft Portal Solutions 9.1 Feature Pack 1

This section discusses:

• Installing Multilingual PeopleSoft Portal Solutions 9.1 Feature Pack 1

• Installing Multilingual File References and Maintenance Log Data

• Reviewing SWPAUDIT Results

Task 2-6-1: Installing Multilingual PeopleSoft Portal Solutions 9.1 Feature Pack 1

Note. Perform this task only if you are installing a multilingual PeopleSoft Portal Solutions database.

1. Download the Oracle Software Delivery Cloud zip file to a convenient directory on the machine that you are using for your PeopleSoft installation.

2. Unzip the files.

3. Locate the installation executable in the extracted root directory or the disk1 directory.

4. Run the setup application from the root directory of the unzipped files (setup.exe).

    The PeopleSoft Installer Welcome page appears.

5. Review the PeopleSoft Installer Welcome page, and then click Next.

    The PeopleSoft License Agreement page appears.

6. Review the license agreement. If you accept the license agreement terms, select the I accept the terms of the license agreement check box, and then click Next.

    The PeopleSoft License Code Details page appears.

7. Enter the PeopleSoft license code, and click Next.

    The PeopleSoft Select Database Type option page appears.

8. Select the database platform that you want to use, and then click Next.

    The PeopleSoft Select Database Type option page appears.

9. Select the database type: *Non-Unicode Database* or *Unicode Database,* and then click Next.

    The PeopleSoft Select Server Types for Install option page appears.

10. Select the types of servers that you want to install, and click Next.

    The PeopleSoft Select the Installation Directory option page appears.

11. Select the directory to which you want to install PeopleSoft Portal Solutions 9.1 Feature Pack 1.

    Click Browse to specify the server install directory name, and then click Next.

    Note. This should be the same directory in which you installed the English files.

    The PeopleSoft Language Features option page appears.

12. Select the PeopleSoft Portal Solutions *language* features that you want to install, where *<language>* matches the languages that you are installing, and then click Next.

    The PeopleSoft Confirmation page appears.

13. The Confirmation page displays the installation options that you selected. Click Next to begin the installation.

    A progress bar displays to indicate the progress of the installation.

14. When the installation completes, click Finish to exit the PeopleSoft Installer.

Task 2-6-2: Installing Multilingual File References and Maintenance Log Data

This section details how to load the multilingual file references and multilingual maintenance log data.

Note. These steps should only be run if you have installed the multilingual media pack.

To import multilingual data:

1. Sign on with PeopleSoft Data Mover to the 9.1 Feature Pack 1 application database.

2. Open the PeopleSoft Data Mover script:

    <PS_APP_HOME>\scripts\multilingual_data_i.dms

3. Run this script against your PeopleSoft Portal Solutions 9.1 Feature Pack 1 application database.

4. Close PeopleSoft Data Mover.

Task 2-6-3: Reviewing SWPAUDIT Results

This step applies only if the multilingual media pack has been installed and if you plan to swap your base language and run swpaudit.

The following SWPAUDIT exceptions are expected and can be ignored:

(SWAP-3) The following Related Language View(s) Have The Wrong Structure Defined

Record Name	Rel Language Record	Unmatched Field	Ownerid
PSADSDEFNSRC_VW	PSADSDFNSLNG_VW	DESCR254	PPT

1 Total Rows

(SWAP-7) The Following Base Records Do Not Have An Unique Index

Record Name	Base Record is:
EPPAN_ADMOPTION	Missing Unique Index

1 Total Rows

Task 2-7: Installing the PeopleSoft Portal Solutions Database

You must create the system and demo PeopleSoft Portal Solutions databases that you want to install.

Note. This chapter does not provide detailed information on the installation of PeopleSoft application databases.

See PeopleSoft PeopleTools Installation Guide, "Creating a Database," for your database platform and for your current PeopleTools release.

Task 2-8: Setting Up the Application Server

Use the PeopleSoft PeopleTools *psadmin* utility to configure an application server for your PeopleSoft Portal Solutions database as follows:

1. Run the psadmin utility from your *<PS_HOME>*/appserv directory.

2. Enter the user ID and user password values that contain the appropriate security to start the application server.

   The PeopleSoft Portal Solutions database delivers with application server security that is granted to the user ID and user password values *VP1* and *VP1*.

3. When configuring the application server, the WSL, JSL, and JRAD port numbers populate by default.

   These values must be unique for the PeopleSoft Portal Solutions database application server. You can alter the port values as necessary.

4. To access the PeopleSoft Portal Solutions database application server from the PeopleSoft Portal Solutions database web server, you must know some of the values that you used to set up the application server. For your reference, complete the following table:

Necessary Information	PA Demo Database	PA System Database
Database Name	PA910DMO, for example.	PA910SYS, for example.
Application Server Name	appservermachine1, for example.	appservermachine1, for example.
JSL Port	9000, for example	9010, for example.

Note. This chapter does not provide detailed information regarding the installation and configuration of application servers.

See PeopleSoft PeopleTools Installation Guide, "Configuring the Application Server," for your database platform and for your current PeopleTools release.

Note. The application server configuration file contains parameters for SMTP mail settings. The mail server is necessary for workflow email notification in the PeopleSoft Applications Portal features. This chapter does not provide information regarding the installation and configuration of mail servers for use by the application server.

See PeopleTools: System and Server Administration PeopleBook, for your current PeopleTools release.

Task 2-9: Setting Up the Process Scheduler

You can use the PeopleSoft PeopleTools *psadmin* utility to configure the PeopleSoft Process Scheduler.

This chapter does not provide information regarding the configuration of the PeopleSoft Process Scheduler.

See PeopleSoft PeopleTools Installation Guide, "Setting Up Process Scheduler," for your database platform and for your current PeopleTools release.

Task 2-10: Setting Up the Web Server

Setting up the web server for the PeopleSoft Portal Solutions database requires that you install a web server and PeopleSoft Pure Internet Architecture. Basically, you are installing a website for your PeopleSoft Portal Solutions database. The localhost name of the web server machine and the database site name uniquely determine this website URL and are defined as follows:

- Localhost—The web server machine name where the PeopleSoft Pure Internet Architecture for the PeopleSoft Portal Solutions database is installed.

- Site Name—The web server directory folder where the files for the PeopleSoft Portal Solutions database are installed.

   The default value is *ps*.

Note. This chapter does not provide detailed information about the installation and configuration of the PeopleSoft Pure Internet Architecture web server files.

See PeopleSoft PeopleTools Installation Guide, "Setting Up the PeopleSoft Pure Internet Architecture," for your database platform and for your current PeopleTools release.

To install the PeopleSoft Pure Internet Architecture for the PeopleSoft Portal Solutions database:

1. Run the PeopleSoft Pure Internet Architecture setup (setup.bat or setup.sh) for the PeopleSoft Portal Solutions database from your *<PS_HOME>*/setup/PsMpPIAInstall.

2. The initial default site name for the PeopleSoft Pure Internet Architecture setup is *ps*.

   This is the web server directory folder where the files for the PeopleSoft Portal Solutions database are installed. Oracle recommends that you use the database name. This allows for easy identification and ensures that the database web server files install in a unique website.

3. Use the values from the table in the previous task, "Setting Up the Application Server," to complete the following steps:

   a. In the AppServer Name field, enter the machine name of the PeopleSoft Portal Solutions database application server.

   b. In the JSL Port field, enter the JOLT port number of the PeopleSoft Portal Solutions database application server, for example, *appservermachine1*.

      The default value is *9000*.

4. Enter an Authentication Token Domain value if you plan to implement PeopleSoft Single Sign-On. Enter your domain name, for example, *peoplesoft.com*.

Note. Use of an Authentication Token domain affects the *localhost* value.

5. Accessing the PeopleSoft Portal Solutions database from your browser depends on the values that you use when setting up the PeopleSoft Portal Solutions database web server. For your reference, complete the following database reference table:

Necessary Information	PA Demo Database	PA System Database
Database Name	PA910DMO, for example.	PA910SYS, for example.
Site Name	pa910dmo, for example.	pa910sys, for example.
Localhost	myserver, for example.	myserver.mydomain.com:8080, for example.

See PeopleSoft PeopleTools Installation Guide, "Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode," for your database platform and current PeopleTools release.

See PeopleSoft PeopleTools Installation Guide, "Setting Up the PeopleSoft Pure Internet Architecture in ConsoleMode," for your database platform and current PeopleTools release.

Task 2-11: Testing the PeopleSoft Portal Solutions Database Sign-On

At this point, you must verify that the configurations of your PeopleSoft Portal Solutions database application server and web server are correct. You can confirm this by signing on to the PeopleSoft Portal Solutions database from the browser.

To sign on to the PeopleSoft Portal Solutions database from the browser:

1. Sign on to the PeopleSoft Portal Solutions database.

   The URL uses the format http://localhost/pshome/signon.html.

   a. Replace *localhost* with the hostname of the web server machine where you installed the PeopleSoft Portal Solutions database web server files.

   b. Replace *pshome* with the site name of the PeopleSoft Portal Solutions database web server files.

      This should be the name of your PeopleSoft Portal Solutions database, or the default value of *ps.*

   Note. If the web server for the PeopleSoft Portal Solutions database is using an Authentication Token Domain, then the *localhost* value must include the network domain name in the URL.

   If the web server for the PeopleSoft Portal Solutions database is using an HTTP port other than the default port of *80,* then the *localhost* value must contain the port number in the URL.

   For example:

   If the URL address was http://myserver/pshome/signon.html, then use the URL address *http://myserver.mydomain.com/pshome/signon.html.*

   If the URL address was http://myserver:8080/pshome/signon.html, then use the URL address *http://myserver.mydomain.com:8080/pshome/signon.html.*

2. In the User ID and User Password fields, enter *VP1*.

   The portal homepage with the PeopleSoft Enterprise Menu pagelet appears, verifying that your sign on was successful. At least three homepage tabs are available for the *VP1* user; they are:

   • My Page (default)

   • Guest

   • Administration

Task 2-12: Setting the Default Portal Registry Definition

The default portal determines which portal registry appears by default when signing on to the PeopleSoft Portal Solutions database from the browser.

Note. The PeopleSoft Portal Solutions database contains only a single default portal. The PeopleSoft Portal Solutions database delivers with the default portal of *EMPLOYEE*.

To set the default portal name:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. In the browser address bar, replace the default portal registry name and node name to change the URL to access other registries.

   For example, you can replace any of these default portal registry and node names:

   • /EMPLOYEE/EMPL/

   • /CUSTOMER/CUST/

   • /SUPPLIER/SUPP/

   • /PARTNER/PART/

     Replace with the following:

     /PS_SITETEMPLATE/ENTP/

3. On your keyboard, click the ENTER key to activate the adjusted address.

4. Select PeopleTools, Portal, Portal Definitions.

   A list of available portal names appears.

5. Select the portal that you want as the default portal from the following values: *CUSTOMER*, *EMPLOYEE*, *SUPPLIER*, and *PARTNER*.

   Note. For more information about default portal registries, refer to the "Understanding PeopleSoft Portal Solutions" chapter in this installation guide.

6. Click Save.

7. Close your browser.

8. Stop the PeopleSoft Portal Solutions database web server.

9. Stop the PeopleSoft Portal Solutions database application server.

10. Purge the PeopleSoft Portal Solutions database application server cache.

11. Start the PeopleSoft Portal Solutions database application server.

12. Start the PeopleSoft Portal Solutions database web server.

Task 2-13: Extending Directory Paths and Copying Folders

This section discusses:

• Extending the Web Folder Directory

• Copying Demo Folders and Files to the Web Server

PeopleSoft Pure Internet Architecture installation allows you to create multiple websites under the same domain. PeopleSoft Portal Solutions recommends that you have one website named *ps* to have a common location to store files for multiple sites. If you do not create such website, you can manually create a *ps* folder in the web server root folder to simulate the *ps* website. The web server root folder is the folder that contains all your custom websites.

PeopleSoft Portal Solutions features utilize the web server directory of the *peoplesoft* domain. You must extend the site name *ps* to include the folder *portal_pa*. You can then copy your demo folders and files to the newly extended *portal_pa* web server directory folder.

Task 2-13-1: Extending the Web Folder Directory

To extend the web folder directory:

1. Extend the web server directory for the *peoplesoft* domain to include the portal_pa folder for the *ps* website in the appropriate PeopleSoft PeopleTools installed directory:

   Oracle WebLogic Server - NT: *<PIA_HOME>*\webserv\<peoplesoft>\applications\peoplesoft \PORTAL.war\ps\images\

   Oracle WebLogic Server - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/applications/peoplesoft /PORTAL.war/ps/images/

   IBM WebSphere Server - NT: *<PIA_HOME>*\webserv\<peoplesoft>\installedApps\<peoplesoft>NodeCell \<peoplesoft>.ear\PORTAL.war\ps\images\

   IBM WebSphere Server - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/installedApps /<peoplesoft>NodeCell/<peoplesoft>.ear/PORTAL.war/ps/images/

2. The resulting directory paths are:

   Oracle WebLogic Server - NT: *<PIA_HOME>*\webserv\<peoplesoft>\applications\peoplesoft \PORTAL.war\ps\images*portal_pa*\

   Oracle WebLogic Server - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/applications/peoplesoft /PORTAL.war/ps/images/*portal_pa*/

   IBM WebSphere - NT: *<PIA_HOME>*\webserv\<peoplesoft>\installedApps\<peoplesoft>NodeCell \<peoplesoft>.ear\PORTAL.war\ps\images\portal_pa\

   IBM WebSphere - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/installedApps/<peoplesoft>NodeCell /<peoplesoft>.ear/PORTAL.war/ps/images/*portal_pa/*

The PeopleSoft Applications Portal features utilize the web server directory of the *peoplesoft* domain. You must extend this directory and copy the demo folders and files to the web server directory of the *peoplesoft* domain.

Task 2-13-2: Copying Demo Folders and Files to the Web Server

To copy demo folders and files to the web server:

Note. Perform this task only for your PeopleSoft Portal Solutions *demo* database.

---

1. Copy the contents of the portal_pa directory from *<PS_APP_HOME>*\ps\images\portal_pa\ into the appropriate web server machine directory:

   Oracle WebLogic Server - NT: *<PIA_HOME>*\webserv\<peoplesoft>\applications\peoplesoft \PORTAL.war\ps\images\portal_pa\

   Oracle WebLogic Server - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/applications/peoplesoft /PORTAL.war/ps/images/portal_pa/

   IBM WebSphere Server - NT: *<PIA_HOME>*\webserv\<peoplesoft>\installedApps\<peoplesoft>NodeCell \<peoplesoft>.ear\PORTAL.war\ps\images\portal_pa\

   IBM WebSphere Server - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/installedApps /<peoplesoft>NodeCell/<peoplesoft>.ear/PORTAL.war/ps/images/portal_pa/

2. The resulting directory paths are:

   Oracle WebLogic - NT: *<PIA_HOME>*\webserv\<peoplesoft>\applications\peoplesoft\PORTAL.war\ps \images*portal_pa*\<website folder + image files + other files>

   Oracle WebLogic - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/applications/peoplesoft/PORTAL.war /ps/images/*portal_pa/*<website folder + image files + other files>

   IBM WebSphere - NT: *<PIA_HOME>*\webserv\<peoplesoft>\installedApps\<peoplesoft>NodeCell \<peoplesoft>.ear\PORTAL.war\ps\images\portal_pa\<website folder + image files + other files>

   IBM WebSphere - UNIX: *<PIA_HOME>*/webserv/<peoplesoft>/installedApps/<peoplesoft>NodeCell /<peoplesoft>.ear/PORTAL.war/ps/images/portal_pa/<website folder + image files + other files>

Task 2-14: Setting Up and Updating Menu Items and Tasks

This section discusses:

• Setting Up Menu Items and Integrated Task List FTP

• Updating the Menu Item FTP URL Definition

• Updating the Tasks FTP URL Definition

Note. This chapter does not provide detailed information regarding the installation and configuration of FTP servers or any concerns for firewalls. Refer to your PeopleSoft PeopleTools PeopleBooks for more information on internet architecture and the Report Repository.

See PeopleSoft PeopleTools Installation Guide, "Setting Up Process Scheduler to Transfer Reports and Logs to the Report Repository," for your database platform and for your current PeopleTools release.

Task 2-14-1: Setting Up Menu Items and Integrated Task List FTP

The PeopleSoft Portal Solutions Menu Items and Integrated Task List features utilize the ability to attach and view files by way of an FTP service. However, you can store the files on any FTP file server or in a database table.

To set up the Menu Items and Integrated Task List FTP service:

1. Establish additional FTP services on an FTP file server.

2. Create multiple FTP IDs on the same server.

    These different IDs can then point to different directories on the same server machine as required by the various FTP URLs.

Task 2-14-2: Updating the Menu Item FTP URL Definition

To update the Menu Item FTP URL definition:

Note. Perform this task only if you want to store the file attachments for the submitted menu items on an FTP server, instead of within the database.

1. Sign on to PeopleSoft Applications Portal from the browser.

2. Select PeopleTools, Utilities, Administration, URLs.

3. In the URL Identifier field, enter *MENU_ITEMS*, and then click Search.

4. Using the format *ftp://FTPuser:FTPpassword@FTPservername/FTPfolder*, change the URL to the FTP server URL that you defined.

Task 2-14-3: Updating the Tasks FTP URL Definition

To update the Tasks FTP URL definition:

Note. Perform this task only if you want to store the file attachments for the Task pagelet on an FTP server, instead of within the database.

1. Sign on to PeopleSoft Applications Portal from the browser.

2. Select PeopleTools, Utilities, Administration, URLs.

3. In the URL ID field, enter *TASKS*, and then click Search.

4. Using the format *ftp://FTPuser:FTPpassword@FTPservername/FTPfolder*, change the URL to the FTP server that you defined.

Task 2-15: Setting the Content Management Storage Locations

This section discusses:

• Understanding Content Management Image Setup

• Establishing FTP Service for Image Attachments

• Updating the EPPCM_IMAGE URL Identifier Definition

• Updating the CMDOCFS URL Identifier

Task 2-15-1: Understanding Content Management Image Setup

The PeopleSoft Portal Solutions can upload, access, and render image files by way of an FTP service. To render image files as actual images, the FTP service must exist in a web server directory in the *peoplesoft* domain. To accomplish this, you must complete the following tasks:

• Extend the web server directory to include the folder path *ps/images/portal_pa/*.

  See "Extending the Web Folder Directory."

• Create an FTP service on the web server machine with an absolute path to the web server directory extended folder path.

• Set the FTP path in the EPPCM_IMAGE URL identifier definition to point to the created FTP service.

• Update the *Image Attachment URL Path* field on the Portal Solutions Installation Options page (select Portal Administration, System Data, Installation Options) to contain the web server relative or absolute URL of the extended path that contains the image files from the FTP server.

Note. The web server directory extension and the FTP service should only be installed on a single web server that is used by the PeopleSoft Portal Solutions database. For clustered web servers, all image attachments are rendered and stored on a single web server that you select.

Task 2-15-2: Establishing FTP Service for Image Attachments

To establish FTP service for Content Management image attachments:

1. Establish an FTP service on the machine that hosts the PeopleSoft Applications Portal web server.

2. Set the FTP home directory to be the same as that of the web server extended path.

   For example:

   If the web server extended directory is as follows:

   C:\pshome\webserv\peoplesoft\applications\peoplesoft\PORTAL.war\ps\images\portal_pa

   Then the FTP home directory must be set to the same path as follows:

   C:\pshome\webserv\peoplesoft\applications\peoplesoft\PORTAL.war\ps\images\portal_pa

Task 2-15-3: Updating the EPPCM_IMAGE URL Identifier Definition

To update the EPPCM_IMAGE URL Identifier definition to point to the FTP service on the web server:

1. Sign on to the PeopleSoft Applications Portal from the browser.

2. Select PeopleTools, Utilities, Administration, URLs.

3. In the URL ID field, enter *EPPCM_IMAGE*, and then click Search.

4. Update the URL field value to point to the FTP server that is created on the web server machine.

   To do this, replace the *user*, *password*, and *localhost* values with the actual values that match your FTP server. Use the following format:

ftp://user:password@localhost. For example: ftp://paftp:paftp1@RT-SUN25

Task 2-15-4: Updating the CMDOCFS URL Identifier

You can store the Content Management file attachments in either the database or on an FTP server. Oracle delivers two different URLs. One for database storage (CMDOCDB) and the other for FTP storage (CMDOCFS). You must correctly define the CMDOCFS URL to point to the FTP server.

Note. This Content Management FTP URL is in addition to the Image Attachment FTP URL. This FTP server does not need to be on the web server machine.

1. Sign on to the PeopleSoft Applications Portal from the browser.

2. Select PeopleTools, Utilities, Administration, URLs.

3. In the URL ID field, enter *CMDOCFS*, and then click Search.

4. Change the URL to your defined FTP server URL, using the format *ftp://FTPuser: FTPpassword@FTPservername/FTPfolder*.

Task 2-16: Configuring the Resource Finder Profile Page

In this task, you adjust a delivered PeopleSoft Applications Portal HTML file.

To configure the Resource Finder profile page for sites that use HTTPS:

Note. If you are using HTTPS/SSO, you must add a line to an HTML file that supports the Resource Finder profile page. This prevents Sun JavaScript cross-domain security violations.

In the EPX_CALENDARPAGE.htm file:

Oracle WebLogic Server - NT:<*PIA_HOME*>\webserv\<peoplesoft>\applications\peoplesoft\PORTAL.war\ps \images\portal_pa\EPX_CALENDARPAGE.htm

Oracle WebLogic Server - UNIX:<*PIA_HOME*>/webserv/<peoplesoft>/applications/peoplesoft/PORTAL.war /ps/images/portal_pa/EPX_CALENDARPAGE.htm

IBM WebSphere - NT: <*PIA_HOME*>\webserv\<peoplesoft>\installedApps\<peoplesoft>NodeCell \<peoplesoft>.ear\PORTAL.war\ps\images\portal_pa\EPX_CALENDARPAGE.htm

IBM WebSphere - UNIX: <*PIA_HOME*>/webserv/<peoplesoft>/installedApps/<peoplesoft>NodeCell /<peoplesoft>.ear/PORTAL.war/ps/images/portal_pa/EPX_CALENDARPAGE.htm

add the following line in italics, replacing <web server domain name> with your web server domain.

```
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
<script language='JavaScript'>
document.domain = "web server domain name";
</script>
```

For example, if the web server domain was peoplesoft.com, the change would be as follows:
```
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
```

```
<script language='JavaScript'>
document.domain = "peoplesoft.com";
</script>
```

See Also

PeopleSoft Applications Portal 9.1 PeopleBook: Resource Finder

Task 2-17: Updating PeopleSoft Applications Portal Options

PeopleSoft Applications Portal features store the last updated ID value for entered content. These values must be set to match the delivered system data.

Note. Perform this task only for your PeopleSoft Portal Solutions *system* database. Do *not* run this against your demo database.

To update PeopleSoft Applications Portal options:

1. Use PeopleSoft Data Mover to sign on to your PeopleSoft Portal Solutions system database.

2. Open the <*PS_APP_HOME*>\scripts\ PORTAL_SYSOPTIONS.DMS script.

3. Follow the directions that are outlined in the script text carefully.

4. Run this script against the PeopleSoft Portal Solutions system database.

5. Close PeopleSoft Data Mover.

Task 2-18: Removing Demo Portal Registry Data

This section discusses:

• Removing Demo Portal Registry Data

• Cleaning the System Data

The registered Company News pagelet, news sections, and news articles are all delivered as demo data. You must remove the demo pagelet from the portal registry since it is not operable without the accompanying demo sections and articles. During the implementation, you can create news publication pagelets and sections to match your needs.

The demo database contains a portal site that you must remove from the system database. During the implementation, you can create portal sites to match your needs.

Note. Perform this task for your PeopleSoft Portal Solutions *system* database only.

For more information about creating a news publication pagelet,

See PeopleSoft Applications Portal 9.1 PeopleBook: Content Management System, "Setting Up and Working With News Publications."

For more information about creating sites,

See PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration, " Site Management Overview."

Task 2-18-1: Removing Demo Portal Registry Data

To remove demo portal registry data:

1. Sign on to the demo database in PeopleSoft Application Designer.

2. Select File, Open.

3. In the Definition field, select *Project*, and then click Open.

4. In the Name column, select the *PORTAL_PASYSDEL* project, and then click Open.

5. Select Tools, Copy Project, To Database.

6. Enter the name of your PeopleSoft Portal Solutions system database, user ID, and password, and then click OK.

7. Click Select All.

8. Click Copy; this may take a few minutes.

   When you click Copy, a dialog box appears informing you that the project already exists.

9. In the dialog box, click Yes to continue to copy the project to your system database.

   Although the project already exists, copying the PORTAL_PASYSDEL project into your system database deletes the intended objects.

10. Close PeopleSoft Application Designer.

Task 2-18-2: Cleaning the System Data

To clean the system data:

Note. Run this script *after* copying the PORTAL_PASYSDEL project.

---

1. Sign on to your PeopleSoft Portal Solutions system database using PeopleSoft Data Mover.

2. Open the PeopleSoft Data Mover script *<PS_APP_HOME>*\scripts\ PORTAL_PASYS_CLEAN.DMS.

3. Run this script against the PeopleSoft Portal Solutions system database.

4. Close PeopleSoft Data Mover.

Task 2-19: Cleaning Homepage Tab Definitions

This section discusses:

• Cleaning the Homepage Tab Definitions

• Refreshing and Deleting Server Caches

Task 2-19-1: Cleaning the Homepage Tab Definitions

To clean the homepage tab definitions:

1. Sign on to your PeopleSoft Portal Solutions database using PeopleSoft Data Mover.

2. Open the *<PS_APP_HOME>*\scripts\ PORTAL_HP_TAB_CLEAN.DMS script.

3. Run this script against the PeopleSoft Portal Solutions database.

4. Close PeopleSoft Data Mover.

Note. When running a PeopleSoft Data Mover script that affects the portal registry, you must refresh the web server cache and delete the application server cache, before the changes can take affect. Refer to the following task, "Refreshing and Deleting Server Caches."

Task 2-19-2: Refreshing and Deleting Server Caches

To refresh the web server cache and delete the application server cache:

1. Stop the PeopleSoft Portal Solutions database web server.

2. Stop the PeopleSoft Portal Solutions database application server.

3. Purge the PeopleSoft Portal Solutions database application server cache.

4. Start the PeopleSoft Portal Solutions database application server.

5. Start the PeopleSoft Portal Solutions database web server.

Task 2-20: Configuring Integration Broker for Feed Publishing

This section discusses:

• Understanding Integration Broker Configuration for Feed Publishing

• Configuring the Integration Broker Gateway and Target Nodes

• Configuring the Service Target Location

• Configuring the Default User of the ANONYMOUS Node

• Configuring the Content URI and Portal URI Node Properties

• Activating EO_PE_RSS Service Operation Routing

Understanding Integration Broker Configuration for Feed Publishing

In this task, you will configure Integration Broker for feed publishing and consumption in the Portal Solutions database.

Note. You must configure Integration Broker to enable the Applications Portal to consume both external and Portal feeds. If you do not plan to leverage the Feed Reader pagelet and feeds publishing capability of Applications Portal, you may skip this task.

Important! Oracle strongly recommends that you clear all caches and restart all servers after you finish the configuration steps.

Task 2-20-1: Configuring the Integration Broker Gateway and Target Nodes

To configure the Integration Broker gateway and Target Nodes:

1. Select PeopleTools, Integration Broker, Integration Network, Configuration Status.

   The Configuration Status page appears.

   Note. You may see some error messages when navigating to the Configuration Status for the first time. After dismissing the error messages, the IB gateway may appear as configured. However, you still need to perform the following steps to ensure that the configuration is done properly.
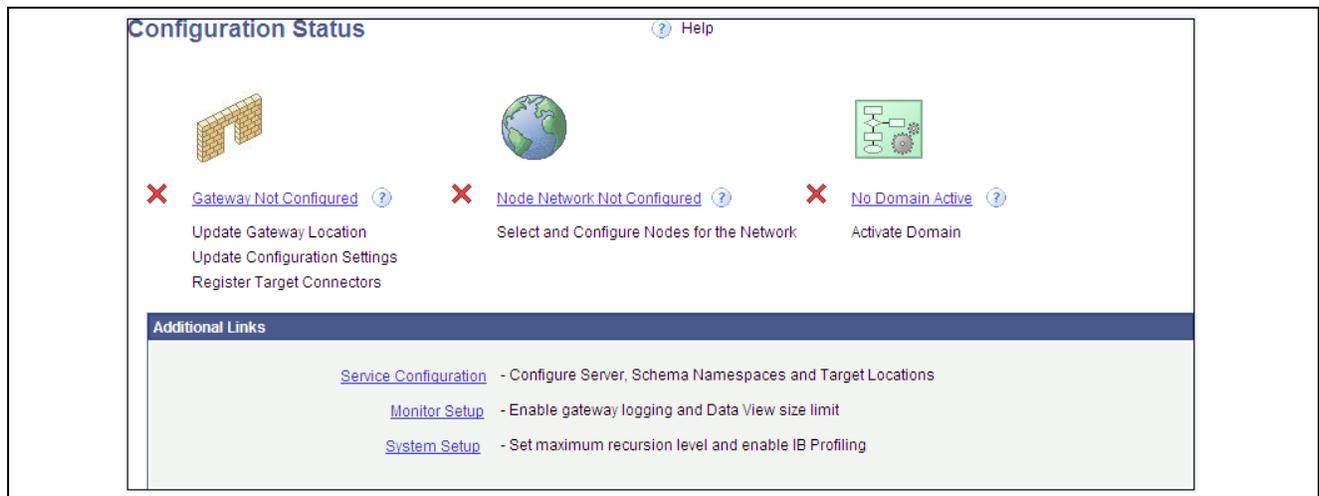
Configuration Status page showing that the Integration Network is not configured

2. Click the Gateway Not Configured link.

   The Gateways page appears.

   See PeopleTools: Feed Publishing Framework PeopleBook, "Configuring Your PeopleSoft System to Support Feeds," for your current PeopleTools release.

3. Configure the integration gateway:

   a. Enter the machine name and complete URL to the PeopleSoftListeningConnector in the Gateway URL field. Ensure that the gateway URL is configured to http://<webserver>:<port>/PSIGW /PeopleSoftListeningConnector, as shown in the example below.

Integration Gateway page

   b. Click the Ping Gateway button.

The PeopleSoft Integration Gateway Page appears.

PeopleSoft Integration Gateway

PeopleSoft Listening Connector
Tools Version : 8.52.02
Status: ACTIVE
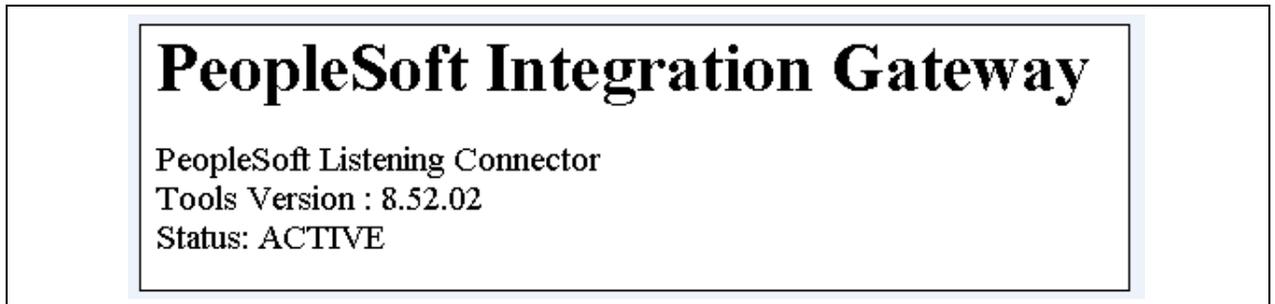
PeopleSoft Integration Gateway Page

c. Click on the Load Gateway Connectors button to load the gateway connectors, and click OK.

Gateways

Gateway ID LOCAL   Inbound Gateways
☑ Local Gateway   ☐ Load Balancer
URL http://<webserver>:<port>/PSIGW/PeopleSoftListeningConnector   Ping Gateway

Gateway Setup Properties   Return to Configuration Status
Load Gateway Connectors

Connectors   Personalize | Find | 🔁 | 🔠 First ◀ 1-10 of 10 ▶ Last

	*Connector ID	Description	*Connector Class Name			
1	AS2TARGET		AS2TargetConnector	Properties	➕	➖
2	EXAMPLETARGETCONNE		ExampleTargetConnector	Properties	➕	➖
3	FILEOUTPUT		SimpleFileTargetConnector	Properties	➕	➖
4	FTPTARGET		FTPTargetConnector	Properties	➕	➖
5	GETMAILTARGET		GetMailTargetConnector	Properties	➕	➖
6	HTTPTARGET		HttpTargetConnector	Properties	➕	➖
7	JMSTARGET		JMSTargetConnector	Properties	➕	➖
8	PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	➕	➖
9	PSFTTARGET		PeopleSoftTargetConnector	Properties	➕	➖
10	SMTPTARGET		SMTPTargetConnector	Properties	➕	➖

Gateways page with connectors loaded

d. Click the Save button to save your changes.

4. Click the Gateway Setup Properties link and log in.

Gateway Properties page

The PeopleSoft Node Configuration page appears.

See PeopleTools: Integration Broker Administration PeopleBook, " Managing Integration Gateways," for your current release of PeopleTools.

a. Enter values for your environment. Enter a default target node in the Gateway Default App Server group box and the local target node in the PeopleSoft Nodes group box.
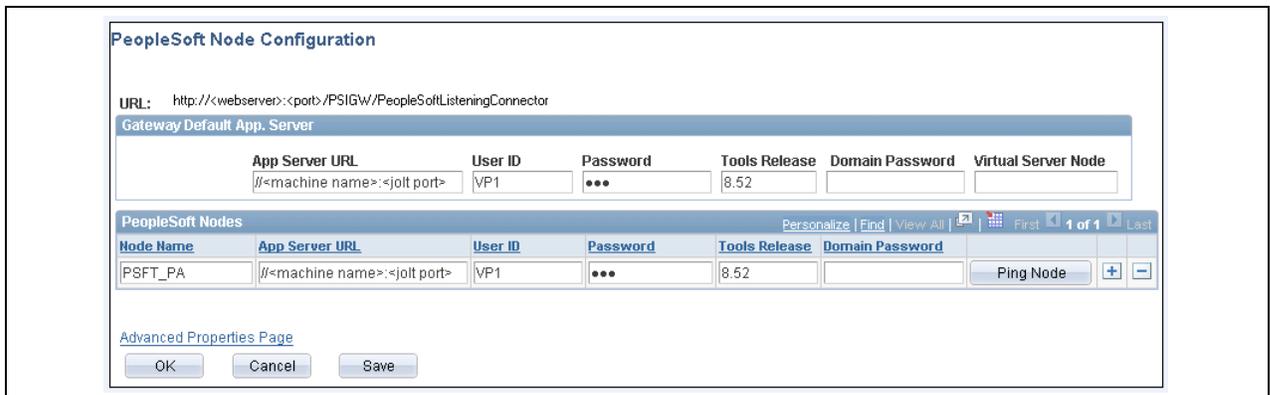
PeopleSoft Node Configuration page

b. For a shared gateway, also enter remote target nodes (the default local node on the remote system) in the PeopleSoft Nodes group box.

The following example shows a shared gateway configuration:

Example of the PeopleSoft Node Configuration page with a shared gateway configuration

c. Click the Save button.

d. Click the Ping Node button for each node.

   The status should return as success.

Note. If you receive an Integration Broker authentication error, the default local node requires that the authentication option be set to password or certificate. See the troubleshooting appendix for more information.

   See PeopleTools: Feed Publishing Framework PeopleBook, "Appendix: Troubleshooting Tips," for your current PeopleTools release.

e. On the Ping Node Results page, click the Return button.

5. On the PeopleSoft Node Configuration page, click the Advanced Properties Page link.

   The Gateway Properties page appears.

   See PeopleTools: Integration Broker Administration PeopleBook, "Managing Integration Gateways," for your current PeopleTools release.

a. Enter the full path to the keystore file and enter the encrypted keystore password.

Note. Ensure that the encrypted keystore password is the password that is used to access the pskey file through the 'pskeymanager'. The default value is 'password'.

   To encrypt the password, expand the Password Encryption panel and enter the keystore password in the Password and Confirm Password fields. Click the Encrypt button. Copy the encrypted password generated in the Encrypted Password field into the Gateway Properties as highlighted in the following example.

Gateway Properties page (setting the keystore location and encrypted password)

   b. Enter the proxy information if the Web Server needs to go through a proxy server to connect to the internet.
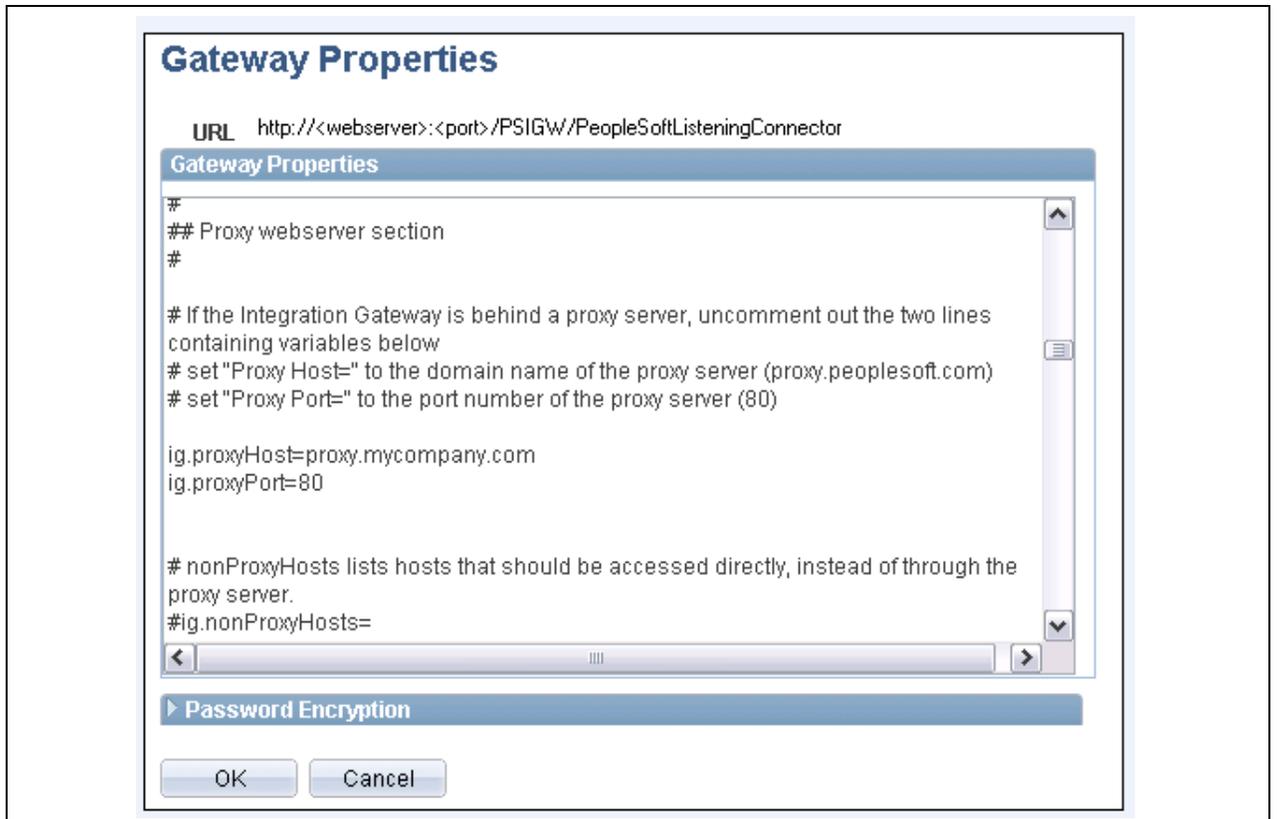
Gateway Properties page to enter proxy information

   c. Click the OK button.

6. On the PeopleSoft Node Configuration page, click the Save button again.

7. Click the OK button.

8. On the Gateways page, click the Return to Configuration Status link.

   The information on the Configuration Status page should indicate that the gateway is now configured.

9. Click the Node Network Not Configured link.

   The Node Network page appears.

10. Select the In Network check box in the Network Nodes grid for all the nodes configured in the gateway.

Node Network

☑ Secure Keystore Value Defined   Return to Configuration Status

Network Nodes ❓

Default Local Node	Node	In Network	Configured in Gateway	Active Node	Remote Gateway Node
☐	ASYNC_MDN	☐	☐	☑	☐
☐	ATOM	☐	☐	☑	☐
☐	BP	☐	☐	☑	☐
☐	CAMP	☐	☐	☑	☐
☐	CIS	☐	☐	☑	☐
☐	CRM	☐	☐	☑	☐
☐	CUST	☐	☐	☑	☐
☐	EIM	☐	☐	☑	☐
☐	ELM	☐	☐	☑	☐
☐	EMPL	☐	☐	☑	☐
☐	ENTP	☐	☐	☑	☐
☐	EPM	☐	☐	☑	☐
☐	ERP	☐	☐	☑	☐
☐	GOVT	☐	☐	☑	☐
☐	PART	☐	☐	☑	☐
☐	PSFT_CIS	☐	☐	☑	☐
☐	PSFT_CR	☐	☐	☑	☐
☐	PSFT_EP	☐	☐	☑	☐
☐	PSFT_FO	☐	☐	☑	☐
☐	PSFT_GF	☐	☐	☑	☐
☐	PSFT_HR	☑	☑	☑	☐
☐	PSFT_IM	☐	☐	☑	☐
☐	PSFT_LM	☐	☐	☑	☐
☐	PSFT_LS	☐	☐	☑	☐
☑	PSFT_PA	☑	☑	☑	☐
☐	PSFT_PF	☐	☐	☑	☐
☐	PT_LDAP	☐	☐	☑	☐
☐	PT_LOCAL	☐	☐	☑	☐
☐	SA	☐	☐	☑	☐
☐	STAF	☐	☐	☑	☐
☐	SUPP	☐	☐	☑	☐

Node Network Grid

11. Click the Save button.

12. Click the Return to Configuration Status link to return to the Configuration Status page.

    The information on the Configuration Status page should indicate that the node network is now configured.

13. Click the No Domain Active link.

    The Domain Status page appears.
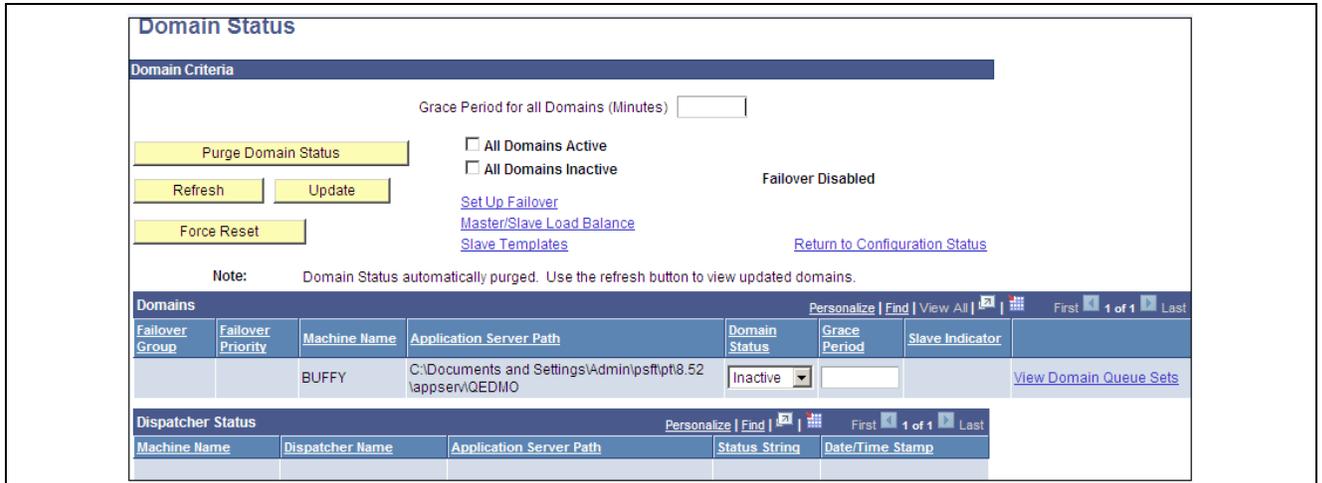
Domain Status page with no active domains

    a. In the Domains group box, set the status for this machine to *Active.*

    b. Also in the Domains group box, set the status for any pub/sub domains to *Active* to support scheduled feeds.

Note. The pub/sub domain must be enabled first in the application server configuration through psadmin.

---

    c. Click the Update button to update the domain status.

14. Return to the Configuration Status page (click Configuration Status in the menu breadcrumbs).

    The status should show that active domain is configured.
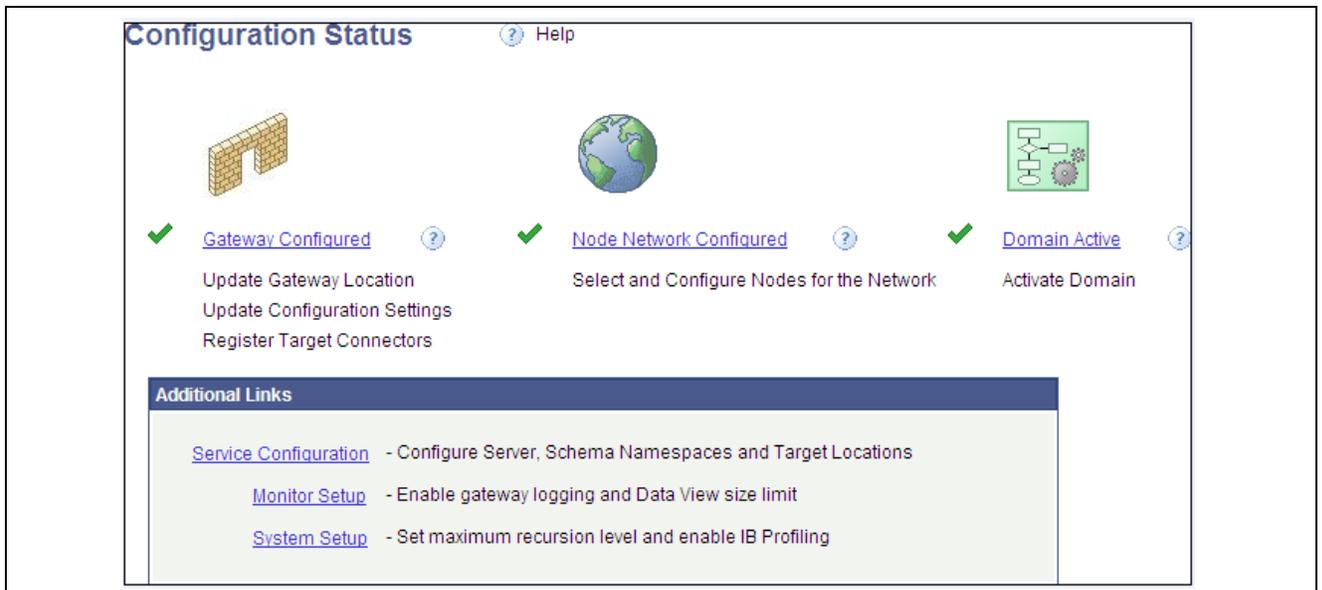
Configuration Status page showing a completed configuration

Task 2-20-2: Configuring the Service Target Location

To configure the service target location:

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

Service Configuration Page

2. Click the Setup Target Locations Link.

3. Enter the correct PeopleSoft Service Listening Connector URLs in the Target Location field and Secure Target Location field and save the changes, as shown in the example below.

Note. The Secure Target Location is optional. However, Oracle recommends that you always set this value as HTTP Basic Authentication is used for feed request authentication, where the user name and password will be sent to the server in clear text. When the Secure Target Location is available, all feed URLs will be generated from it.

Target Locations Page

See PeopleTools: Feed Publishing Framework PeopleBook, "Configuring the Integration Broker Service Target Location," for your current PeopleTools release.

Task 2-20-3: Configuring the Default User of the ANONYMOUS Node

To configure the default user of the ANONYMOUS node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.

2. Search and open the ANONYMOUS node.

3. Select the Node Definitions tab and ensure that the Default User ID is a valid user ID with limited privileges, such as the PAPP_USER user, or any other user based on the requirement, as shown in the example below.

Node Definitions page

See PeopleTools: PeopleSoft Integration Broker Administration PeopleBook, "Adding and Configuring Nodes," for your current PeopleTools release.

Task 2-20-4: Configuring the Content URI and Portal URI Node Properties

To configure the content URI and portal URI node properties:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.

2. Search and open the default local node (PSFT_PA).

3. Ensure that the Authentication Option is *Password* or *Certificate*, as shown in the example below.
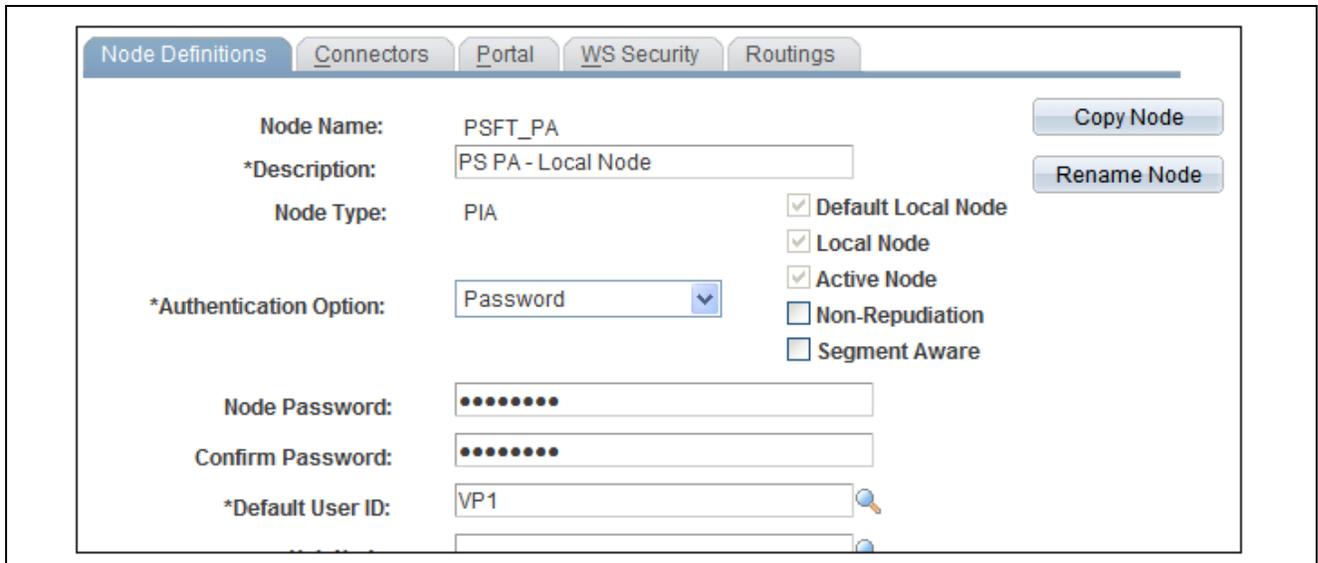
Node Definitions page

4. Select the Portal tab and ensure that the Content URI Text and the Portal URI Text are pointing to the Portal Solutions database, as shown in the example below.
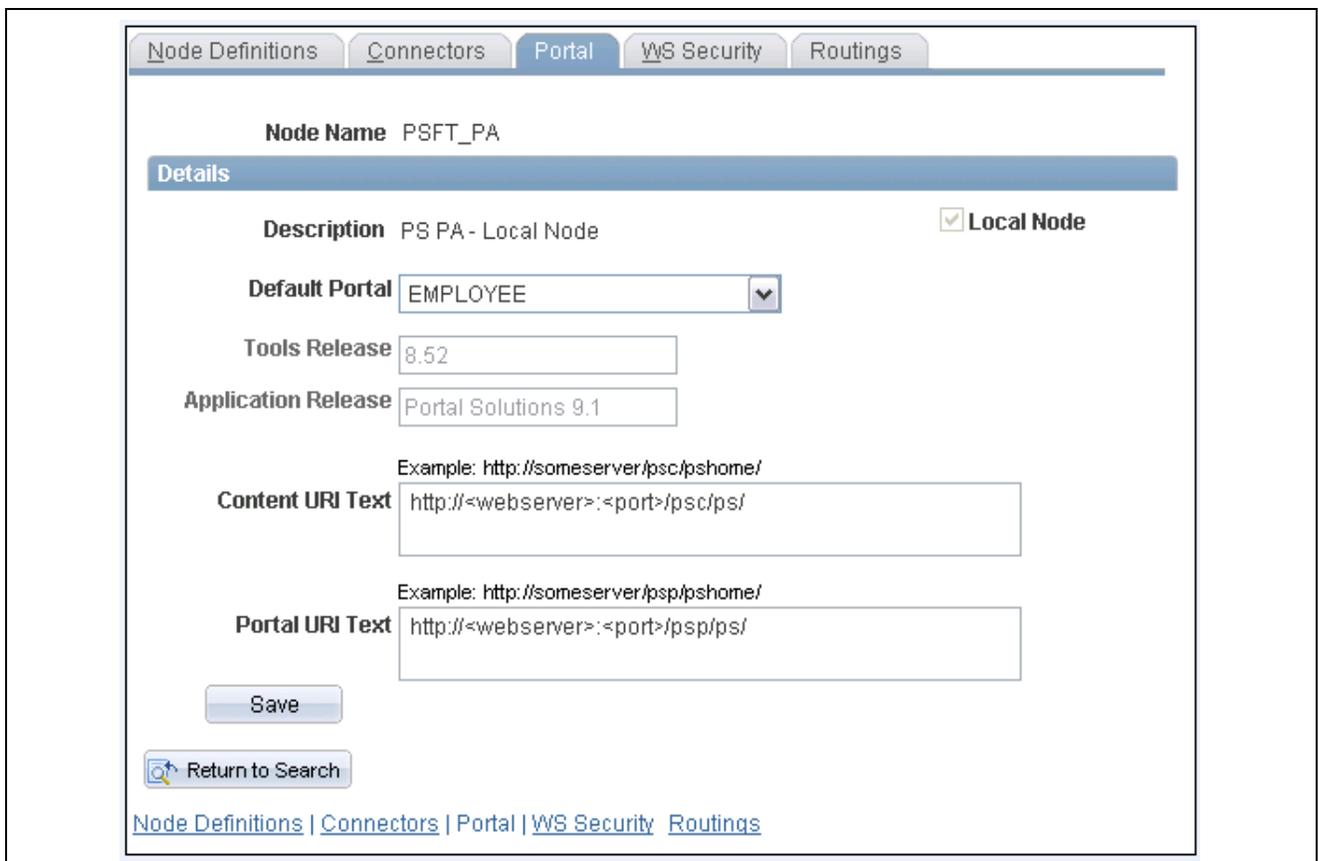
Node Definitions page: Portal tab

5. Search and open all other portal host nodes of the Portal Solutions database, such as CUST, EMPL, ENTP, PART, and SUPP.

6. Repeat Step 4 for each node.

See PeopleTools: PeopleTools Portal Technologies PeopleBook, "Configuring the Portal Environment," for your current PeopleTools release.

Task 2-20-5: Activating EO_PE_RSS Service Operation Routing

To activate the EO_PE_RSS service operation routing:

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

   The Service Operations search page appears.

2. On the Service Operations search - Find Service Operation page, in the Service Operation field, enter *EO_PE_RSS*.

3. In the search results grid, click the EO_PE_RSS link to access the EO_PE_RSS service operation of the EO_PE_RSS service, as shown in the following example:

Service Operations - Find Service Operation search page

4. On the Service Operations General page for EO_PE_RSS, select the Routings tab to access the Routings page for EO_PE_RSS, as shown in the following example:

Service Operations - Routings page for EO_PE_RSS

5. Select the Selected check box to pick the routing.

6. Click on the Activate Selected Routings button.

7. Click Save.

8. Click on the General tab.

9. Select the Active check box, if it is not checked.

10. Click Save.

CHAPTER 3

Installing PeopleSoft Single Sign-On

This chapter discusses:

• Prerequisites

• Utilizing the Network Domain Name

• Adding the Content Provider URI Path

• Renaming and Configuring Password Authentication

• Configuring a Default Local Node in a Content Provider

• Configuring PS Portal URI in Content Provider

• Setting Up Common User IDs

• Testing PeopleSoft Single Sign-On

• Troubleshooting PeopleSoft Single Sign-On

Note. PeopleSoft databases that contain application transaction content are referred to as *content provider* databases. Content provider database transactions are accessed by the PeopleSoft Portal Solutions database by way of content reference pointers.

Warning! Complete the tasks in this chapter *after* you have successfully set up the application server and web server installations for your PeopleSoft Portal Solutions database *and* your content provider databases.

See "Installing PeopleSoft Portal Solutions " in this installation guide.

See PeopleSoft PeopleTools Installation Guide, "Configuring the Application Server," for your database platform and for your current PeopleTools release.

Prerequisites

Complete the tasks in this chapter after you successfully install the content provider and PeopleSoft Portal Solutions databases, as well as the application and web servers.

PeopleSoft Portal Solutions database access to additional PeopleSoft databases is accomplished through content providers and PeopleSoft Single Sign-On. PeopleSoft Single Sign-On allows you to access the multiple content provider databases from the PeopleSoft Portal Solutions database without signing on to each database.

For the PeopleSoft Portal Solutions database Single Sign-On to access databases on *different* physical web server machines, the following elements must be in place:

- The PeopleSoft Portal Solutions and content provider database web server configuration properties files include the full network domain name.

- The PeopleSoft Portal Solutions database contains the content provider database mapped URI that includes the full network domain name.

- The PeopleSoft Portal Solutions database default local node is configured with password authentication in the PeopleSoft Portal Solutions and content provider databases.

- The PeopleSoft Portal Solutions database and the content provider database contain common user IDs.

- The content provider database lists the PeopleSoft Portal Solutions database default local node as trusted.

- In addition to the requirements that are listed here, the PeopleSoft Portal Solutions and content provider databases on PeopleSoft PeopleTools 8.52.02 or higher must also have the following in place: The content provider database must contain the PeopleSoft Portal Solutions database mapped URI that includes the full network domain name.

  Note. Remember that PeopleSoft Portal Solutions 9.1 Feature Pack 1 runs on PeopleSoft PeopleTools 8.52.02 or higher.

For the PeopleSoft Portal Solutions database Single Sign-On to access databases on the *same* web server machines, the following elements must be in place:

- The PeopleSoft Portal Solutions database must contain the content provider database mapped URI.

- The PeopleSoft Portal Solutions database default local node is configured with password authentication in the PeopleSoft Portal Solutions and content provider databases.

- The PeopleSoft Portal Solutions database and the content provider database contain common user IDs.

- The content provider database lists the PeopleSoft Portal Solutions database default local node as trusted.

- In addition to the requirements that are listed here, the PeopleSoft Portal Solutions and content provider databases on PeopleSoft PeopleTools 8.52 or higher must also have the following in place: The content provider database must contain the PeopleSoft Portal Solutions database mapped URI that includes the full network domain name.

  Note. Remember that PeopleSoft Portal Solutions 9.1 Feature Pack 1 runs on PeopleSoft PeopleTools 8.52.02 or higher.

Task 3-1: Utilizing the Network Domain Name

PeopleSoft Single Sign-On is implemented using browser cookies. Consequently, you must configure the web server so that your browser sends the single sign-on cookie to each web server machine to which you require single sign-on access. By default, the browser only sends cookies back to the machine that set the cookie.

Note. Perform this task only if the web servers for your PeopleSoft Portal Solutions database and any single content provider database reside on *different* machines.

For databases whose web servers reside on different machines, you must utilize the network domain name in the web server configuration. Extend the *localhost* name to include the full domain name. You can do this by appending the domain name to the *hostname* of the web server machine name. For example, assume the following:

- The PeopleSoft Portal Solutions web server machine localhost name is *myserver1*.

- The content provider web server machine localhost name is *myserver2*.

- The network full domain name is *mydomain.com*.

If web server *myserver1.mydomain.com* sets a cookie (when you enter your ID and password into the sign-on page of the PeopleSoft Portal Solutions web server myserver1), then the browser only sends the cookie back to *myserver1.mydomain.com*. The browser does not send the cookie to *myserver2.mydomain.com*. To have the browser send the single sign-on cookie to all servers in the network domain, you must use the Authentication Token Domain.

Note. If your web server, *myserver*, has a static IP address and an entry in the Domain Name Server (DNS), then you can access the localhost value of *myserver.mydomain.com* (network domain name) by way of a browser.

Without a DNS entry, browsers in the network domain can access the PeopleSoft Portal Solutions database only if the browser machine Hosts file includes a line that specifies the IP address of the PeopleSoft Portal Solutions web server machine.

See PeopleTools: PeopleTools Portal Technologies PeopleBook, for your current release of PeopleTools.

See PeopleTools: Security Administration PeopleBook, for your current release of PeopleTools.

Note. When using the network domain name, you must set the Authentication Token Domain for the PeopleSoft Portal Solutions database *and* the accessed content provider databases. You can do this by specifying an Authentication Token Domain during the PeopleSoft Pure Internet Architecture setup. Alternatively, you can adjust the Authentication Domain property on the General tab of the Web Profile Configuration page by selecting PeopleTools, Web Profile.

See PeopleSoft PeopleTools Installation Guide, "Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode," for your database platform and current PeopleTools release.

See PeopleSoft PeopleTools Installation Guide, "Setting Up the PeopleSoft Pure Internet Architecture in ConsoleMode," for your database platform and current PeopleTools release.

See PeopleTools: PeopleTools Portal Technologies PeopleBook, for your current PeopleTools release.

Note. When setting the Authentication Token Domain in the *content provider* database web server configuration, the content provider URL path in the PeopleSoft Portal Solutions database must include the network domain name as part of the *localhost* value. Refer to the task "Updating the content provider URI Paths" in this chapter.

Note. When setting the Authentication Token Domain in the *PeopleSoft Portal Solutions* database web server configuration, the browser URL address must include the network domain name as part of the *localhost* value. Refer to the "Testing PeopleSoft Single Sign-On" task in this chapter.

Task 3-2: Adding the Content Provider URI Path

This section discusses:

- Understanding Adding the Content Provider URl Path

- Updating the Content Provider URI Paths

Understanding Adding the Content Provider URI Path

The PeopleSoft Portal Solutions database must contain a URI mapping to the accessed content provider database. The content provider URI is derived from the content provider web server *localhost* and the content provider directory or site name where you installed the PeopleSoft web server files.

You can perform this update online or by using PeopleSoft Data Mover.

Note. Oracle recommends that you update the content provider URI paths online.

Task 3-2-1: Updating the Content Provider URI Paths

To update content provider URI paths:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. Select PeopleTools, Portal, Node Definitions.

   The Nodes search page appears.

3. Select the content provider node.

   The Node Definitions page appears.

   The following table lists the delivered node name associated with each content provider:

Content Provider	Delivered Node
CIS PT8.4x	CIS
CRM PT8.4x	CRM
EIM PT8.4x	EIM
ELM PT8.4x	ELM
EPM PT8.4x	EPM
FSCM PT8.4x	ERP
HRMS PT8.4x	HRMS
SFO PT8.4x	STAF

4. On the Node Definitions tab, verify that the Node Type field value is set to *PIA* for the content provider node.

5. On the Portal tab, enter the content URI text using the following example:

   http://localhost/psc/pshome

   Example for Port 80: *http://myserver/...*

   Example for Port other than 80: *http://myserver:8080/...*

   Example for Port 80 with a network domain name: *http://myserver.mydomain.com/...*

   Example for Port other than 80 with a network domain name: *http://myserver.mydomain.com:8080/...*

6. Perform the same steps to enter the portal URI text using the following example: *http://localhost/psp/pshome/*, where *pshome* is the home folder that was installed during the PeopleSoft Pure Internet Architecture installation.

Task 3-3: Renaming and Configuring Password Authentication

This section discusses:

• Renaming the PeopleSoft Portal Solutions Default Local Node

• Configuring the Password in the PeopleSoft Portal Solutions Database

PeopleSoft Single Sign-On and PeopleSoft Integration Broker (messaging) use the same default local node. Each application database is delivered with a default local node that uses the naming convention PSFT_*XX*, where *XX* is the database identifier. For your system to distinguish between multiple copies of the same database, the default local node can be renamed to reference the given instance of the PeopleSoft database. Oracle recommends that you use the database name when renaming the default local node.

For single sign-on to work, you must configure password authentication for the PeopleSoft Portal Solutions default local node in the PeopleSoft Portal Solutions and content provider databases. The password can be any combination of characters, numbers, or symbols, as long as the password is the same on the PeopleSoft Portal Solutions and content provider databases for the PeopleSoft Portal Solutions default local node.

Message nodes that are actively in use (containing queued messages) cannot be renamed until the message queues are cleared.

Task 3-3-1: Renaming the PeopleSoft Portal Solutions Default Local Node

To rename the PeopleSoft Portal Solutions database default local node:

Note. You can only rename database message nodes. You cannot rename content provider message nodes.

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. Select PeopleTools, Portal, Node Definitions.

   The Node Definitions search page appears.

3. Click Search.

4. Select the node name that you want to rename.

   The database default local node contains the default local node value of *Y*. The delivered default local node for the PeopleSoft Portal Solutions database is *PSFT_PA*.

5. On the Node Definitions tab, click Rename Node.

6. Enter the new name for the PeopleSoft Portal Solutions database default local node.

   Oracle recommends that you use the database name as the new node name. Enter the value in uppercase with no spaces.

7. Click Save.

Note. You cannot rename message nodes that contain queued messages or are referenced in runtime tables. If you get the following error message, you cannot rename the node until you clear all queued messages on that message node: `<Node name>` `is in use by the Publish/Subscribe system. It may not be renamed.`

If you get the following error message, you need to remove the routing and messages defined for this node: `Node <Node Name> cannot be renamed.  Node referenced in runtime tables.`

Task 3-3-2: Configuring the Password in the PeopleSoft Portal Solutions Database

To configure the authentication password in the PeopleSoft Portal Solutions database:

1. From your browser, sign on to your PeopleSoft Portal Solutions database.

2. Select PeopleTools, Portal, Node Definitions.

   The Node Definition Search page appears.

3. Click Search.

4. Select the PeopleSoft Portal Solutions default local node.

   The default local node contains the default local node value of *Y*. The PeopleSoft Portal Solutions database delivered default local node is *PSFT_PA*. Be sure to use the node name that you used when renaming the PeopleSoft Portal Solutions database default local node. The new node name is likely to be the same as your PeopleSoft Portal Solutions database name.

5. In the Authentication Option field on the Node Definition tab, select the *Password* value.

6. In the Password field, enter *<Node Password>*. Then on your keyboard, press the TAB key.

7. In the Confirm Password field, enter *<Node Password>*.

8. Click Save.

9. Stop the PeopleSoft Portal Solutions database web server.

10. Start the PeopleSoft Portal Solutions database web server.

Task 3-4: Configuring a Default Local Node in a Content Provider

This section discusses:

• Signing On to Your Content Provider Database

• Renaming the Default Local Node in a Content Provider

• Trusting Default Local Node for PeopleSoft PeopleTools 8.4x

• Configuring 8.4x Content Provider Password

Task 3-4-1: Signing On to Your Content Provider Database

To sign on to your content provider database:

1. Open your browser.

2. Enter the URL for the content provider database. The URL uses the format *http://localhost/pshome /signon.html*.

   Replace *localhost* with the *hostname* of the web server machine where the content provider database web server files are installed.

   Replace *pshome* with the *site name* of the PeopleSoft content provider database web server files. The default value is *ps* for PeopleSoft PeopleTools 8.4x databases.

   Note. If the web server for the content provider database is using an Authentication Token Domain, then the localhost value must include the network domain name in the URL. If the web server for the content provider database is using an HTTP port other than the default port of 80, then the localhost value must contain the port number in the URL.

   For example, if the URL address is *http://myserver/pshome/signon.html,* then use the following URL address:

   http://myserver.mydomain.com/pshome/signon.htm

   If the URL address is *http://myserver:8080/pshome/signon.html,* then use the following URL address:

   http://myserver.mydomain.com:8080/pshome/signon.html

   ---

3. Enter the superuser user ID and user password values on the sign-on screen. For example, *VP1/VP1*.

   For PeopleSoft 8.4x databases, the database homepage that displays the Menu pagelet appears.

Trusting the PeopleSoft Portal Solutions database default local node involves the following set of subtasks:

For PeopleSoft Single Sign-On to work, each content provider database must list the PeopleSoft Portal Solutions database default local node as *trusted*.

Note. If your content provider database contains content that is to be used by multiple PeopleSoft Portal Solutions databases, the following subtasks can be repeated for each additional PeopleSoft Portal Solutions database default local node.

For example, if you have installed an EMPLOYEE portal and a SUPPLIER portal in two separate PeopleSoft Portal Solutions database instances, you may want to access a single PeopleSoft Financials/PeopleSoft Supply Chain Management database from both of the PeopleSoft Portal Solutions database instances.

If you renamed the default local node in the PeopleSoft Portal Solutions database, you must also rename the default local node in the content provider database.

Message nodes that are actively being used (contain queued messages) cannot be renamed until the message queues are cleared.

Note. You can only rename database message nodes; you cannot rename content provider message nodes.

Task 3-4-2: Renaming the Default Local Node in a Content Provider

To rename the PeopleSoft Portal Solutions database default local node in the Content Provide database:

1. From your browser, sign on to the content provider database.

2. Select PeopleTools, Portal, Node Definitions.

   The Node Definitions Search page appears.

3. Click Search.

4. Select the node name that you want to rename.

   This is the original node name of the default local node that you renamed in the PeopleSoft Portal Solutions database. The delivered default local node for the PeopleSoft Portal Solutions database is *PSFT_PA*.

5. On the *Node Definition* tab, click Rename.

6. Enter the new name that you want to use for the PeopleSoft Portal Solutions database default local node in the content provider database.

   This should be the same value that you used to rename the default local node in the PeopleSoft Portal Solutions database. Oracle recommends that you use the database name as the new node name in the PeopleSoft Portal Solutions database. Enter the value in uppercase with no spaces.

7. Click Save.

Note. You cannot rename message nodes that contain queued messages or you will receive the following error message: "<Node name> is in use by the Publish/Subscribe system. It may not be renamed." You cannot rename the node until you clear all queued messages on that message node.

Task 3-4-3: Trusting Default Local Node for PeopleSoft PeopleTools 8.4x

To trust the PeopleSoft Portal Solutions default local node in databases that are running on PeopleSoft PeopleTools 8.4x:

Note. The target database is any content provider PeopleSoft application database that is running on PeopleSoft PeopleTools 8.4x that you want to access from your PeopleSoft Portal Solutions database.

---

1. From your browser, sign on to your PeopleSoft PeopleTools 8.4x content provider database.

2. Select PeopleTools, Security, Security Objects, Single Signon.

   The Single Signon page appears.

3. Click Add to insert a new row.

4. Select the PeopleSoft Portal Solutions database default local node.

   If you renamed the PeopleSoft Portal Solutions database default local node, use the new node name. This new node name is likely to be the same as your PeopleSoft Portal Solutions database name.

5. Click Save.

6. Restart the content provider database web server.

Task 3-4-4: Configuring 8.4x Content Provider Password

To configure the authentication password in the PeopleSoft PeopleTools 8.4x content provider database:

Note. Complete the following steps for each PeopleSoft PeopleTools 8.4x content provider database for which you want to use PeopleSoft Single Sign-On with the PeopleSoft Portal Solutions database.

---

1. From your browser, sign on to your PeopleSoft PeopleTools 8.4x content provider database.

2. Select PeopleTools, Portal, Node Definitions.

    The Node Definitions Search page appears.

3. Click Search.

4. Select the PeopleSoft Portal Solutions database default local node.

    If you renamed the PeopleSoft Portal Solutions database default local node, use the new node name. This new node name is likely to be the same as your PeopleSoft Portal Solutions database name.

5. On the Node Definition tab, select Password in the Authentication Option field.

6. Enter *<Node Password>* in the Password field.

    Use the same password that you created in the step "Configuring the Password in the PeopleSoft Portal Solutions Database." On your keyboard, press the TAB key.

7. Enter *<Node Password>* in the Confirm Password field.

8. Select the Portal tab.

    Ensure that the Tools Release and Application Release fields are the same as your Portal database for the Portal Local Node. You can verify this information by accessing the Portal Node Integration Broker Portal Tab.

9. Enter both the content URI text and portal URI text values that correspond to the PeopleSoft Portal Solutions database web server.

    a. The content URI uses the *.../psc/...* format.

        For example, Content URI Text = *http://<someserver>/psc/<site name>/*

    b. The portal URI uses the *.../psp/...* format.

        For example, Portal URI Text = *http://<someserver>/psp/<site name>/*

        Replace the *<someserver>* value with the hostname of your PeopleSoft Portal Solutions database web server. Include the port number and network domain name as necessary.

        Replace the *<site name>* value with the directory in which you installed the PeopleSoft web server files for your PeopleSoft Portal Solutions database. Do not forget to use the trailing forward slash "/" character.

10. Click Save.

11. Restart the content provider database web server.

Task 3-5: Configuring PS Portal URI in Content Provider

PeopleSoft PeopleTools 8.43 changed the way PeopleSoft Applications Portal interacts with the content provider. You are no longer required to configure a *remote node* in the content provider database to access content references and pagelets in the PeopleSoft Applications Portal. You can allow user access to content provider data through PeopleSoft Applications Portal or the navigation delivered in the content provider database. To use PeopleSoft Single Sign-On, you must configure the PeopleSoft Applications Portal content and portal URI text for the appropriate portal registry node.

Note. The content provider portal registries should not be hosted by a remote node.

To configure PeopleSoft Applications Portal URI text in the content provider:

1. From your browser, sign on to your PeopleSoft PeopleTools 8.4x content provider database.

2. Select PeopleTools, Portal, Node Definitions.

    The Node Definitions Search page appears.

3. Click Search.

4. Select the appropriate portal registry node for the portal definition that you are using.

    The following table lists the portal names and corresponding node names.

Portal Name	Node Name
EMPLOYEE	EMPL
CUSTOMER	CUST
SUPPLIER	SUPP
PARTNER	PART

5. Select the Portal tab.

6. Enter both the content URI text and portal URI text values that correspond to the PeopleSoft Portal Solutions database web server.

    a. The content URI uses the *.../psc/...* format.

        For example, Content URI Text = http://<someserver>/psc/<site name>/

    b. The Portal URI uses the *.../psp/...* format.

        For example, Portal URI Text = http://<someserver>/psp/<site name>/

        Replace the *<someserver>* value with the hostname of your PeopleSoft Portal Solutions database web server. Include the port number and network domain name as necessary.

        Replace the *<site name>* value with the directory in which you installed the PeopleSoft web server files for your PeopleSoft Portal Solutions database. Do not forget to use the trailing forward slash "/" character.

7. Click Save.

8. Restart the content provider database web server.

Task 3-6: Setting Up Common User IDs

To add or update the common user ID VP1:

1. From your browser, sign on to each applicable content provider database to which you want to connect from your PeopleSoft Portal Solutions database.

2. In the content provider database, Select the PeopleSoft PeopleTools User Profiles page.

    For PeopleSoft 8.4x databases, select PeopleTools, Security, User Profiles, User Profiles.

3. On the Add a New Value tab, enter *VP1* in the User ID field, and then click Add.

4. If this message displays, *The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above*, select the *VP1* user ID value in the search results.

5. On the General tab, update the following settings:

   a. If the Symbolic ID field is blank, select the symbolic ID for your database.

   b. In the Password field, enter *VP1*.

   c. In the Confirm Password field, enter *VP1*.

6. On the ID tab, if the ID Type field is blank, select *None*. If the ID Type field is not blank, leave as is.

7. For PeopleSoft PeopleTools 8.4x databases, insert the PeopleSoft Administrator role if it does not already exist on the Roles tab. Do not remove any existing roles.

8. Click Save.

Task 3-7: Testing PeopleSoft Single Sign-On

To test PeopleSoft Single Sign-On:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

   The URL uses the following format: `http://localhost/pshome/signon.html`

   Note. Before testing SSO, it is strongly recommended to clear the server and browser cache and bounce all servers.

2. For each applicable PeopleSoft content provider, select Portal Administration, Test, Single Sign On, <Content Provider> User Profiles.

3. Confirm that the Search dialog box for the User Profile page for that content provider database appears.

Note. The User Profiles transaction pages are being directly accessed from the content provider database.

Task 3-8: Troubleshooting PeopleSoft Single Sign-On

To troubleshoot PeopleSoft Single Sign-On:

1. Check the license code.

   Ensure that the license code is not blank. The WEBLIB functions that are used to access the PeopleSoft Applications Portal Home page require a valid license code.

   Query the database using an SQL query tool by running the following SQL against the database:

   ```
   SELECT LICENSE_CODE FROM PSOPTIONS
   ```

2. Check the Message Nodes.

   a. Ensure that the message nodes that exist on multiple PeopleSoft databases are the same.

   This means that the node name, the password, the PeopleSoft PeopleTools release, and the Application Release properties are an exact match in both the PeopleSoft Portal Solutions and the content provider database.

   Access the 8.4x Message Node definition online by selecting PeopleTools, Portal, Node Definitions.

   Query the database using an SQL query tool by running the following SQL against the database:

   ```
   SELECT * FROM PSMSGNODEDEFN
   ```

b. Ensure that the PeopleSoft Portal Solutions database local default message nodes are inserted as trusted into all of the content provider databases that you are accessing by way of PeopleSoft Single Sign-On.

Verify which Message Nodes are trusted in an 8.4x PeopleSoft PeopleTools database online by selecting PeopleTools, Security, Security Objects, Single Signon.

Query the database using an SQL query tool by running the following SQL against the database:

```
SELECT * FROM PSTRUSTNODES
```

c. Ensure that the content provider message node on the PeopleSoft Portal Solutions database has the correct Node Type.

Ensure that the node is active.

Content provider nodes for databases running on PeopleSoft 8.4x must have a Node Type of *PIA*.

Verify the node information online by selecting PeopleTools, Portal, Node Definitions.

Select the Node Definition tab to view the Node Type and active status settings.

Query the database using an SQL query tool by running the following SQL against the database:

```
SELECT * FROM PSMSGNODEDEFN
```

d. Ensure that the PeopleSoft Portal Solutions database default local node in the PeopleSoft Portal Solutions and content provider databases use password authentication and also use the same password.

Because the password is encrypted when you enter it, you must re-enter the password in PeopleSoft Portal Solutions and all content provider databases. Be sure to use the same capitalization and verify that CAPS LOCK is not activated when you enter your password.

To re-enter your password in the PeopleSoft Portal Solutions, select PeopleTools, Portal, Node Definitions. Select the Node Definition tab.

To re-enter your password in your content provider database running on PeopleSoft PeopleTools 8.4x, select PeopleTools, Portal, Node Definitions. Select the Node Definition tab.

Note. Messaging also uses the database local message node value. Changing the value of which message node is the Local Node affects both the portal sign-on and messaging.

---

3. Verify the content reference URL.

a. Verify the registry structure for the menu item (content reference). Ensure that the registry structure contains the correct syntax in the URL text for the PeopleSoft PeopleTools release of the content provider database.

Access the registry structure by selecting PeopleTools, Portal, Structure and Content. Ensure that the menu, market, and component are correctly displayed online.

Run the following using your SQL query tool:

```
SELECT PORTAL_NAME, PORTAL_LABEL, PORTAL_OBJNAME,
PORTAL_CNTPRV_NAM, PORTAL_URLTEXT FROM PSPRSMDEFN
WHERE PORTAL_REFTYPE = 'C'
AND PORTAL_CNTPRV_NAM IN
('BP','CRM','ELM','EPM','ERP','GFHA','HRMS','SA','SAHA','VAN')
AND PORTAL_LABEL = '<Fill in the link label you are testing>'
```

The URL text for content references running on PeopleSoft 8.4x uses the following format:

c/MAINTAIN_SECURITY.USERMAINT.GBL?ParamName=ParamValue

b. Check the content provider URI text in the PeopleSoft Portal Solutions database.

Access content provider URI text information by selecting PeopleTools, Portal, Node Definitions. Select the Portal tab to view content URI text.

Query the database using an SQL query tool by running the following SQL against the database:

```
SELECT * FROM PSNODEURITEXT
```

Verify that the content provider URI paths for databases with web servers on different machines utilize the full network domain name.

Verify that the web server name used in the configuration.properties file and the content provider URI paths use the same capitalization format. This problem manifests itself as a web server error: "Unable to open page."

4. Verify the local node properties and uses.

a. Verify the local default node.

The PORTAL_NAME for the local node must match the default portal in the PeopleSoft Portal Solutions database. The NODE_TYPE must be *PIA*.

Query the database using an SQL query tool by running the following SQL against the database:

```
SELECT MSGNODENAME, LOCALNODE, LOCALDEFAULTFLG, NODE_TYPE, PORTAL_NAME FROM⇒
 PSMSGNODEDEFN
```

This problem manifests itself as an error: "Could not open registry."

b. Verify the Hosted by Node of the different portal registries.

A local node should host each PeopleSoft Portal Solutions database portal registry. The PORTAL_REMOTE value should be set to *0*.

Query the database using an SQL query tool by running the following SQL against the database:

```
SELECT * FROM PSPRDMDEFN
```

This problem manifests itself as an error: "Could not open registry."

Note. This is the expected behavior for accessing any 8.4x content provider homepage if you have set the 8.4x content provider portal registry to be hosted by a remote node. In this case, access to the 8.4x content provider is achieved only through the PeopleSoft Applications Portal.

---

5. Verify use of different web server HTTP port numbers.

The browser may have an issue with PeopleSoft Single Sign-On in the following scenario:

The PeopleSoft Portal Solutions database and the content provider database are using the same web server, but the content provider database web server configuration has a different HTTP port; http://myserver:5000/, for example.

To resolve this issue, do one of the following:

a. Move one of the web servers to a different machine.

b. Add a second DNS entry for the web server and use a different name.

Ensure that the two DNS entries share a common domain and set the *authtokendomain* in the configuration.properties file for the web server accordingly.

    c. Set the defaultPort setting in the configuration.properties file on the content provider web server to the HTTP/HTTPS port value on which the web server is running.

      Normally, if you are not using a reverse proxy server or SSL accelerator, you do not need to set the defaultPort property. However, it can be set in this situation.

6. Verify the Content and Portal URI text in the content provider database for the Registry Node.

   If you are able to access the content provider using the User Profile test links, but your pagelets are not displaying correctly, you must configure the Content and Portal URI text in the content provider database for the Registry Node.

7. Verify that your webserver has an Authentication Token Domain. For example, us.oracle.com

8. Ensure that the content provider node configured on the Portal Solutions database is the same one as specified below:

    a. Navigate to Portal Administration, Navigation, Structure and Content

    b. Select Portal Administration, Test, Single Sign On, and Edit for the application you are using as content provider. The Node Name field has the node name used to access that content provider.

CHAPTER 4

Accessing PeopleSoft Content Providers

This chapter discusses:

*   Understanding PeopleSoft Content Provider Access

*   Enabling PeopleSoft 8.4x Homepage Personalization (Required)

*   Accessing PeopleSoft by Single Link (Recommended)

*   Determining PeopleSoft Portal Solutions Database Default (Required)

*   Installing PeopleSoft 8.4x Portal Pack Project (Reference)

*   Maintaining Roles and User IDs (Reference)

Note. PeopleSoft application databases that contain transaction content are referred to as the *content provider* databases.

Warning! Complete the tasks in this chapter *after* you have successfully tested PeopleSoft Single Sign-On to the applicable PeopleSoft content provider. For more information, refer to the "Installing PeopleSoft Single Sign-On" chapter in this installation guide. If your PeopleSoft Portal Solutions database is not connecting to any PeopleSoft content provider databases, you can skip this chapter and the associated appendices.

Understanding PeopleSoft Content Provider Access

The PeopleSoft Applications Portal allows direct access to your PeopleSoft content provider databases from the portal. This direct access includes homepage pagelets and navigation. The method of access can be a single link from the portal navigation pointing into the PeopleSoft content provider navigation, or physically storing the PeopleSoft content provider registry data within the PeopleSoft Applications Portal.

Physically storing the registry data within the PeopleSoft Portal Solutions allows you to have your entire navigation in an aggregated location. However, using the single link approach greatly increases the simplicity of your security setup as well as future upgrades. For these reasons, Oracle recommends that navigation to the PeopleSoft content provider be accomplished by way of a single link within the PeopleSoft Portal Solutions database.

To facilitate the recommended approaches to accessing the PeopleSoft content provider database, the tasks in this chapter use the following notations:

*   Required—Perform during the *installation* phase.

    This is required for subsequent tasks, "Enabling PeopleSoft 8.4x Homepage Personalization (Required)" and "Determining PeopleSoft Portal Solutions Database Default (Required)."

*   Recommended—Perform during the *installation* and *implementation* phases.

This indicates the recommended approach and applies to the task, "Accessing PeopleSoft by Single Link (Recommended)."

Oracle recommends that you access the PeopleSoft 8.4x content provider portal registry data by way of a single link in the PeopleSoft Portal Solutions database.

• Reference—Optionally perform during the *implementation* phase.

This indicates that the material is listed in this guide only as a reference. This applies to tasks "Installing PeopleSoft 8.4x Portal Pack Project (Reference)" and "Maintaining Roles and User IDs (Reference)."

Delivered portal projects have been created in a PeopleSoft 8.4x format enabling them to successfully and correctly copy into the PeopleSoft Portal Solutions database on PeopleSoft PeopleTools 8.4x.

Instructions to physically store the PeopleSoft 8.4x content provider portal registry data within the PeopleSoft Portal Solutions database are located in the appendixes of this installation guide. The tasks in this chapter point you to the correct documents.

Task 4-1: Enabling PeopleSoft 8.4x Homepage Personalization (Required)

This section discusses:

• Updating PeopleSoft PeopleTools 8.4x Homepage Security

• Updating the PeopleSoft 8.4x Content Provider GUEST User

To view the PeopleSoft portal pack products within the PeopleSoft PeopleTools 8.4x content provider, homepage personalization security access must be granted to all non-guest users.

Note. Perform this task only for the PeopleSoft PeopleTools 8.4x content provider databases for which you have purchased a PeopleSoft Portal Pack.

Task 4-1-1: Updating PeopleSoft PeopleTools 8.4x Homepage Security

To update the PeopleSoft PeopleTools 8.4x content provider homepage security:

1. Use PeopleSoft Data Mover to sign on to the PeopleSoft PeopleTools 8.4x content provider database.

2. Open the *<PS_APP_HOME>*\scripts\PORTAL_HP_PERS.DMS script that was delivered on the PeopleSoft Portal Solutions 9.1 Feature Pack 1 media pack.

3. Run this script against the PeopleSoft PeopleTools 8.4x content provider database.

4. Open the *<PS_APP_HOME>*\scripts\PORTAL_ ADD_ROLE.DMS script that was delivered on the PeopleSoft Portal Solutions 9.1 Feature Pack 1 media pack.

5. Run this script against the PeopleSoft PeopleTools 8.4x content provider database.

6. Close PeopleSoft Data Mover.

Task 4-1-2: Updating the PeopleSoft 8.4x Content Provider GUEST User

To update the PeopleSoft 8.4x content provider GUEST user:

Note. Grant the PAPP_USER role to all new user IDs for access to PeopleSoft Applications Portal navigation and the homepage personalization pages. After you run this script, manually remove the PAPP_USER role from any GUEST user ID.

---

1. From your browser, sign on to each applicable PeopleSoft 8.4x content provider database.

2. Select PeopleTools, Security, User Profiles, User Profiles.

3. In the User ID field, enter *GUEST* or the equivalent guest user ID for the database.

4. Click Search.

   The General page appears.

   If the message *No matching values were found* displays, the remaining steps in this task are not applicable and you can skip this task and proceed to the next task "Accessing PeopleSoft by Single Link—Recommended."

5. Click the Roles tab.

6. Delete the row that contains the *PAPP_USER* role.

7. Click Save.

Task 4-2: Accessing PeopleSoft by Single Link (Recommended)

This section discusses:

• Testing the Single Link to PeopleSoft Content Provider

• Hiding a PeopleSoft Content Provider Single Link

The PeopleSoft Portal Solutions database is delivered with a single link to each supported PeopleSoft content provider database on each supported PeopleSoft PeopleTools release. If you do not own a specified PeopleSoft content provider database on a given PeopleSoft PeopleTools release, you can hide the PeopleSoft content provider single link.

Task 4-2-1: Testing the Single Link to PeopleSoft Content Provider

To test the single link to the PeopleSoft content provider:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. For each applicable PeopleSoft content provider, select PeopleSoft, <Content Provider>.

3. The single PeopleSoft *<Content Provider>* link directs you to the PeopleSoft content provider database in the following way:

For PeopleSoft content provider databases on PeopleSoft PeopleTools 8.4x, the <Content Provider> 8.4x link opens a new window that displays the homepage of the PeopleSoft 8.4x Content Provider corresponding portal registry definition.

Note. The portal registry definition refers to the transaction for the intended audience. The EMPLOYEE portal definition is for employee transactions. The CUSTOMER portal definition is for customer transactions. The SUPPLIER portal definition is for supplier transactions. The PARTNER portal definition is for partner transactions.

Task 4-2-2: Hiding a PeopleSoft Content Provider Single Link

To hide a PeopleSoft content provider single link:

Note. If you choose to load the PeopleSoft PeopleTools 8.4x content provider navigation into the PeopleSoft Portal Solutions database, then do *not* hide the content provider 8.4x PeopleSoft PeopleTools single link. The loaded PeopleSoft PeopleTools 8.4x content provider registry will not load the PeopleSoft PeopleTools navigation, and the single PeopleSoft PeopleTools link enables you to access the PeopleSoft PeopleTools for the 8.4x content providers from your PeopleSoft Portal Solutions database. You can access the PeopleSoft PeopleTools navigation from the PeopleSoft PeopleTools 8.4x content provider PS_SITETEMPLATE portal registry.

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. Select PeopleTools, Portal, Structure and Content.

3. Select the PeopleSoft link in the Folder scroll area.

4. Select the Edit link for the Content Reference link that you want to hide.

5. On the Content Ref Administration page, select the Hide from portal navigation option.

6. Click Save.

Task 4-3: Determining PeopleSoft Portal Solutions Database Default (Required)

The PeopleSoft Portal Solutions database contains a single default portal. The default portal determines which portal registry is accessible when signing on to the PeopleSoft Portal Solutions database from the browser. The PeopleSoft content provider portal data is specific to the default portal registry that is defined in the PeopleSoft Portal Solutions database.

To determine the default portal:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. Select PeopleTools, Portal, Portal Definitions.

3. The Default option is selected for the default portal.

4. Make a note of the PeopleSoft Portal Solutions database default portal, for use in subsequent tasks in this chapter and the appendices.

Task 4-4: Installing PeopleSoft 8.4x Portal Pack Project (Reference)

The "Installing PeopleSoft 8.4x Portal Pack and Navigation Projects" appendix in this installation guide provides instructions and guidelines on how to install the PeopleSoft PeopleTools 8.4x content provider Portal Project into the PeopleSoft Portal Solutions database.

See Appendix: Installing PeopleSoft 8.4x Portal Pack and Navigation Projects.

Note. Installing the PeopleSoft 8.4x content provider portal project is an optional implementation task. Oracle recommends that you use the single link navigation to the PeopleSoft 8.4x content providers instead. Use this task only as a reference for use during the implementation phase.

Note. If you are installing the PeopleSoft 8.4x content provider portal project for PeopleSoft Enterprise CRM 8.4, then you must also perform the tasks in the "Installing PeopleSoft CRM Navigation" appendix in this installation guide after completing the tasks in the "Installing PeopleSoft 8.4x Portal Pack and Navigation Projects" appendix.

See Appendix: Installing PeopleSoft CRM Navigation.

Task 4-5: Maintaining Roles and User IDs (Reference)

To allow you to easily access the content provider database from within the PeopleSoft Portal Solutions database, both databases must contain the common user IDs and associated roles. Maintaining roles and user IDs across PeopleSoft Portal Solutions and content provider databases is an implementation task and *not* an installation task. Use this task only as a reference for use during the implementation phase.

See PeopleTools: Security Administration PeopleBook, for your current PeopleTools release.

APPENDIX A

Removing PeopleSoft Content Provider Portal Data

This appendix discusses:

• Understanding Content Provider Portal Data Removal

• Creating PeopleSoft Applications Portal Registry Delete Project Files

• Deleting Prior PeopleSoft Content Provider Portal Data

• Cleaning the PeopleSoft Portal Solutions Database

• Accessing Current Release PeopleSoft Content Providers

Note. PeopleSoft application databases that contain transaction content are referred to as the *content provider* databases.

Warning! Do not perform this task on a PeopleSoft content provider application database. This task is specific only to the PeopleSoft Portal Solutions database. This task removes the previous application release registry data along with any customization that you may have performed on those registry entries. Removal of prior release content provider data is required before you copy the delivered registry projects for the current application release.

Understanding Content Provider Portal Data Removal

When you upgrade your PeopleSoft content provider database, you must also upgrade the portal registry data in the PeopleSoft Portal Solutions database. The PeopleSoft Applications Portal registry data must match the current content provider transactions. To upgrade the PeopleSoft Applications Portal registry data to match your current release, you must copy the Delete projects to your PeopleSoft Portal Solutions database and run a script to remove portal registry objects that no longer exist in the current application release.

After you remove the prior release content provider data, you can load the current release content provider portal registry data into the PeopleSoft Portal Solutions database.

Complete the tasks in this chapter only if all of the following conditions are met:

• Your PeopleSoft Portal Solutions database is on Portal Solutions 9.1 Feature Pack 1.

• You have upgraded your content provider database after installing the PeopleSoft Applications Portal.

• You have loaded a previous release of the content provider application portal registry data into the PeopleSoft Portal Solutions database.

Task A-1: Creating PeopleSoft Applications Portal Registry Delete Project Files

Before you copy the new content provider navigation and portal pack registry data into your PeopleSoft Portal Solutions 9.1 Feature Pack 1 database, you must remove the old data. Removing the old data consists of creating a Delete project from the Copy project.

Note. There are no corresponding portal permission Delete projects.

To create the PeopleSoft content provider Portal Pack and Navigation Delete project:

1. Sign on to your PeopleSoft Portal Solutions database in two-tier mode using PeopleSoft Application Designer.

2. Select File, Open.

3. Open the content provider portal pack and navigation *Copy* projects.

   The following table lists copy project naming conventions.

Copy Project Naming Conventions	
PeopleSoft 8.4x, includes Navigation and Portal Pack in a single project.	PORTAL_*<pp>*84x_*<registryname>*, for example: PORTAL _CR84X_EMPL

   Note. *<pp>* represents the content provider database identifier. *<release>* represents the release number for your application. *<registryname>* represents the portal registry.

4. Select File, Save Project As.

5. Rename the Copy project file by adding *_DEL* to the end of the Copy project name.

   For example, *PORTAL_CR84X_EMPL_DEL*.

6. Click OK.

7. Remove the permission list and folder registry objects from the project definition.

   You only want to keep content reference objects in the project definition.

8. Select Edit, Upgrade, Set Action for Project, Delete, to change the Action to *Delete* for all of the content references.

9. Click Save Project.

10. Use the Copy Project to File utility to copy the delete project to file.

Note. If you are removing a content provider navigation and Portal Pack project for a content provider on a PeopleSoft PeopleTools release prior to 8.4x, you can retrieve the Delete projects from My Oracle Support under the report ID 100106. Follow the instructions in the posted update to make the portal Delete projects available to your PeopleSoft Portal Solutions database.

You must copy the files and folders that you retrieve from My Oracle Support into the respective *<PS_APP_HOME>*\projects and *<PS_APP_HOME>*\scripts file directories of your PeopleSoft Portal Solutions application database. These are the same directories in which you installed the PeopleSoft Portal Solutions 9.1 Feature Pack 1 media pack .

Task A-2: Deleting Prior PeopleSoft Content Provider Portal Data

To copy the portal registry Delete projects:

Warning! This task removes the previous application release registry data along with any customization that you may have performed on those registry entries.

1. Sign on to your PeopleSoft Portal Solutions database in two-tier mode using PeopleSoft Application Designer.

2. Copy only the portal Delete project that corresponds to a previous release of a content provider that you have since upgraded and for which the Portal Registry Delete project name matches the name of a previously copied Portal Registry project.

3. Repeat the following steps for each applicable Delete Portal Project definition.

   Note. For content provider Delete projects prior to the PeopleSoft PeopleTools 8.4x release, the instructions posted on My Oracle Support under report ID 100106 list the delivered Delete Portal Projects and their corresponding content provider database and release.

   a. Select Tools, Copy Project, From File.

   b. Select the location where you copied the Delete project.

   c. Click OK.

   d. Select the applicable Portal Registry Delete Project name.

   e. Click Open.

   f. Click Select All.

   g. Click Copy.

Note. You do *not* need to create or alter any records or views.

Task A-3: Cleaning the PeopleSoft Portal Solutions Database

This section discusses:

• Deleting Obsolete Folders

• Updating Version Numbers

The Delete projects only remove content references. Consequently, empty portal registry folders may exist. You should remove these empty folders. After removing portal registry data, you must update the PeopleSoft Portal Solutions database cache and versioning to reflect the changes.

Task A-3-1: Deleting Obsolete Folders

To delete obsolete folders:

1. In your target PeopleSoft Portal Solutions database, select Portal Administration, Navigation, Delete Empty Folders.

2. Add a run control ID of *FOLDER_CLEAN_XXXX,* where *XXXX* represents the portal registry name, such as EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

3. Enter the portal name that corresponds to the *XXXX* in the run control ID portal registry name, such as EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

4. Click Save.

5. Click Run.

6. Set up the Process Scheduler information and click OK.

7. Click the Process Monitor link to view the progress of the process.

8. Stop the PeopleSoft Portal Solutions database web server.

9. Stop the PeopleSoft Portal Solutions database application server.

10. Purge the PeopleSoft Portal Solutions database application server cache.

11. Start the PeopleSoft Portal Solutions database application server.

12. Start the PeopleSoft Portal Solutions database web server.

Task A-3-2: Updating Version Numbers

To update the version numbers, from the command line prompt, execute the following Application Engine program to replace the parameters with those applicable to your PeopleSoft Portal Solutions database:

```
ps_home\bin\client\winx86\psae -CT <dbtype> -CS <server> -CD
<dbname> -CO <oprid> -CP <oprid password> -R 1 -AI VERSION -I 1
```

Task A-4: Accessing Current Release PeopleSoft Content Providers

Refer to the "Accessing PeopleSoft Content Providers" chapter in this installation guide for instructions and guidelines on how to access PeopleSoft content providers from the PeopleSoft Portal Solutions database.

See "Accessing PeopleSoft Content Providers."

APPENDIX B

Installing PeopleSoft 8.4x Content Provider Data

This appendix discusses:

- Updating PeopleSoft 8.4x Content Provider Portal Registry
- Creating PeopleSoft 8.4x Content Provider Portal Project
- Copying PeopleSoft 8.4x Content Provider Portal
- Updating PeopleSoft Portal Registry Permissions
- Updating PeopleSoft Portal Default Homepage

Note. PeopleSoft application databases that contain transaction content are referred to as *content provider* databases.

Note. If you choose to load PeopleSoft 8.4x Portal Pack registry data, you must also load the PeopleSoft 8.4x navigation data for accurate link rendering. The tasks in this chapter enable you to load both Portal Pack and portal navigation data from a PeopleSoft 8.4x content provider database.

Task B-1: Updating PeopleSoft 8.4x Content Provider Portal Registry

This section discusses:

- Updating PeopleSoft Portal Registry Permission Lists
- Deleting PeopleSoft 8.4x Content Provider Cache

The PeopleSoft 8.4x content provider databases are delivered with the portal registry data included. You can update this registry data to accommodate your permission list changes. After you update the PeopleSoft portal registry permission lists, you must delete the database cache to reflect the changes.

Note. This process may take anywhere from a few minutes to a few hours, depending upon the volume of the portal data. The user ID that invokes this process must have the security role Portal Administrator or the process may terminate with an abend.

Task B-1-1: Updating PeopleSoft Portal Registry Permission Lists

To update the PeopleSoft portal registry permission lists:

1. From your browser, sign on to your PeopleSoft 8.4x content provider database.

2. Select PeopleTools, Portal, Portal Utilities, Sync Collection Security.

3. Add a run control ID of *SECURITY_SYNC_XXXXXXXX,* where *XXXXXXXX* represents the portal registry definition name.

    For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

4. Enter the portal definition name that matches the *XXXXXXXX* of the run control portal registry name.

    For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

5. Click Save.

6. Click Run.

7. Set up the Process Scheduler information and click OK.

8. Click the Process Monitor link to view the progress of the process.

Task B-1-2: Deleting PeopleSoft 8.4x Content Provider Cache

To delete the PeopleSoft 8.4x content provider database cache:

1. Stop the PeopleSoft content provider database web server.

2. Stop the PeopleSoft content provider database application server.

3. Purge the PeopleSoft content provider database application server cache.

4. Start the PeopleSoft content provider database application server.

5. Start the PeopleSoft content provider database web server.

Task B-2: Creating PeopleSoft 8.4x Content Provider Portal Project

This section discusses:

• Creating PeopleSoft 8.4x Content Provider Portal Project

• Cleaning PeopleSoft 8.4x Content Provider Portal Project

• Cleaning PeopleSoft 8.4x in All Other Application Databases

• Deleting PeopleSoft 8.4x Content Provider Two-Tier Cache

This task entails creating a "catch all" portal registry and permission list project, removing the extraneous project items from the project definition using PeopleSoft Data Mover, and then clearing the two-tier cache to accurately reflect the project definition.

Task B-2-1: Creating PeopleSoft 8.4x Content Provider Portal Project

To create the PeopleSoft 8.4x content provider portal project:

1. Sign on to your PeopleSoft 8.4x content provider database in two-tier mode using PeopleSoft Application Designer.

2. Select File, New.

3. Select a New Definition value of *Project,* and then click OK.

4. Select Insert, Definitions into Project.

5. Select a Definition Type value of *Permission List,* and then click Insert.

6. Click Select All, and then click Insert again.

7. Select the Definition Type value of *Portal Registry Definitions,* and then click Insert.

8. Select the portal name that matches the PeopleSoft Portal Solutions database default portal name.

   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

9. Highlight the Related Definitions value of *Portal Registry Structures*, and then click Insert.

10. Click Close.

11. Select File, Save Project As.

12. Enter the applicable project name from the following table of PeopleSoft 8.4x content provider Portal Project names.

Content Provider on PeopleSoft PeopleTools 8.4x	PeopleSoft Portal Name	PeopleSoft Project Name
CRM	EMPLOYEE	PORTAL_CR84X_EMPL
CRM	CUSTOMER	PORTAL_CR84X_CUST
CRM	PARTNER	PORTAL_CR84X_PART
ELM	EMPLOYEE	PORTAL_LM84X_EMPL
EPM	EMPLOYEE	PORTAL_PF84X_EMPL
FSCM	EMPLOYEE	PORTAL_EP84X_EMPL
FSCM	CUSTOMER	PORTAL_EP84X_CUST
FSCM	SUPPLIER	PORTAL_EP84X_SUPP
HRMS	EMPLOYEE	PORTAL_HC84X_EMPL
SFO	EMPLOYEE	PORTAL_ FO84X_EMPL
SFO	CUSTOMER	PORTAL_FO84X_CUST

13. Click OK.

14. Close PeopleSoft Application Designer.

Task B-2-2: Cleaning PeopleSoft 8.4x Content Provider Portal Project

To clean the 8.4x content provider portal project in all application databases on PeopleSoft PeopleTools 8.46 or higher:

Warning! Before you export the PeopleSoft 8.4x content provider portal project from the PeopleSoft content provider database, you *must* run the Clean Portal Project process against the PeopleSoft content provider database.

---

1. In your PeopleSoft content provider database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.

2. Add a run control ID of *CLEAN_PORTAL_XXXXXXXX,* where *XXXXXXXX* represents the portal definition name.

    For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

3. Enter the Project Name that you just created.

    For example: *PORTAL_EP84X_EMPL.*

4. Enter a Portal Name.

    For example: *EMPLOYEE.*

5. Enter a content provider Name.

    For example: *ERP.*

6. Select Full Navigation.

7. Click Save.

8. Click Run.

9. Set up the Process Scheduler information and click OK.

10. Click the Process Monitor link to view the progress of the process.

Note. Continue with the task "Deleting the PS 8.4x content provider Database Two-Tier Cache."

Task B-2-3: Cleaning PeopleSoft 8.4x in All Other Application Databases

To clean the PeopleSoft 8.4x content provider portal project in all other application databases on PeopleSoft PeopleTools 8.45 or less:

Warning! Before you export the PeopleSoft 8.4x content provider portal project from the PeopleSoft content provider database, you *must* run the applicable PORTAL_XX84X_XXXX_CLEAN.DMS script against the PeopleSoft content provider database.

---

1. The following table lists the PeopleSoft Data Mover scripts that will clean the corresponding PeopleSoft 8.4x content provider portal project definition. Copy the applicable script to the *<PS_APP_HOME>*\scripts directory of the PeopleSoft 8.4x content provider database.

PeopleSoft Content Provider on PeopleSoft PeopleTools 8.4x	PeopleSoft Portal Name	PeopleSoft Script Name
CRM	EMPLOYEE	PORTAL_CR84X_EMPL_ CLEAN.DMS
CRM	CUSTOMER	PORTAL_CR84X_CUST_ CLEAN.DMS
CRM	PARTNER	PORTAL_CR84X_PART_ CLEAN.DMS
ELM	EMPLOYEE	PORTAL_LM84X_EMPL_ CLEAN.DMS
EPM	EMPLOYEE	PORTAL_PF84X_EMPL_ CLEAN.DMS

PeopleSoft Content Provider on PeopleSoft PeopleTools 8.4x	PeopleSoft Portal Name	PeopleSoft Script Name
FSCM	EMPLOYEE	PORTAL_EP84X_EMPL_CLEAN.DMS
FSCM	CUSTOMER	PORTAL_EP84X_CUST_CLEAN.DMS
FSCM	SUPPLIER	PORTAL_EP84X_SUPP_CLEAN.DMS
HRMS	EMPLOYEE	PORTAL_HC84X_EMPL_CLEAN.DMS
SFO	EMPLOYEE	PORTAL_ FO84X_EMPL_CLEAN.DMS
SFO	CUSTOMER	PORTAL_FO84X_CUST_CLEAN.DMS

2.   Use PeopleSoft Data Mover to sign on to the PeopleSoft 8.4x content provider database.

3.   From the *<PS_APP_HOME>*\scripts\ directory, open the PeopleSoft Data Mover script that corresponds to the created PeopleSoft 8.4x content provider portal project name in the previous list.

4.   Run this script against the PeopleSoft 8.4x content provider database.

5.   Close PeopleSoft Data Mover.

Note. Continue with the task "Deleting the PS 8.4x content provider Database Two-Tier Cache."

Task B-2-4: Deleting PeopleSoft 8.4x Content Provider Two-Tier Cache

To delete the PeopleSoft 8.4x content provider database two-tier cache:

1.   Start the PeopleSoft 8.4x content provider database Configuration Manager.

2.   On the Startup tab, click Purge Cache Directories.

3.   Select the PeopleSoft 8.4x content provider database name.

4.   Click Delete, click OK, and then click Close.

5.   Close Configuration Manager by clicking OK.

Task B-3: Copying PeopleSoft 8.4x Content Provider Portal

This section discusses:

• Copying PeopleSoft 8.4x Portal Project to File

• Copying PeopleSoft 8.4x Portal Project from File

• Deleting PeopleSoft Portal Solutions Database Cache

Note. If you have copied a previous release content provider portal registry project into your PeopleSoft Portal Solutions database, you must remove that registry data. See the "Removing PeopleSoft Content Provider Portal Data" appendix in this installation guide for instructions on how to remove the prior release PeopleSoft content provider portal registry data.

See Appendix: Removing PeopleSoft Content Provider Portal Data.

Warning! Before you export the PeopleSoft 8.4x content provider portal project from the PeopleSoft content provider database, you *must* clean the PeopleSoft content provider Portal Project, as described in the previous steps Cleaning PS 8.4x content provider Portal Project. If you do not perform this task, necessary PeopleSoft Portal Solutions-specific data in the PeopleSoft Portal Solutions database is overwritten when the project copies into the PeopleSoft Portal Solutions database.

Task B-3-1: Copying PeopleSoft 8.4x Portal Project to File

To copy the PeopleSoft 8.4x content provider portal project to file:

1. Sign on to your PeopleSoft 8.4x content provider database in two-tier mode using PeopleSoft Application Designer.

2. Select File, Open.

3. In the Definition field, select *Project*.

4. Click Open, highlight the newly created PeopleSoft 8.4x content provider portal project name, and then click Open.

5. Select Tools, Copy Project, To File.

6. Click Browse for the Export Directory. Navigate to a temporary directory, and then click OK.

7. Click Select All.

8. Click Copy.

   This may take a few minutes.

9. Close PeopleSoft Application Designer.

Task B-3-2: Copying PeopleSoft 8.4x Portal Project from File

To copy the PeopleSoft 8.4x content provider portal project from file:

1. Sign on to your PeopleSoft Portal Solutions database in two-tier mode using PeopleSoft Application Designer.

2. Select Tools, Copy Project, From File.

3. Browse to the PeopleSoft 8.4x content provider database server temporary directory.

   This should be the temporary directory to which you copied the PeopleSoft 8.4x content provider portal project to file in, "Copying Peoplesoft 8.4x Portal Project to File."

Note. If you cannot access the PeopleSoft 8.4x content provider database server temporary directory, you can copy the PeopleSoft portal project folder and files from the temporary directory to the PeopleSoft Portal Solutions database server <*PS_APP_HOME*>\Projects directory.

If your PeopleSoft 8.4x content provider and PeopleSoft Portal Solutions databases are on the same PeopleSoft PeopleTools release and database platform, you can copy the project directly to the PeopleSoft Portal Solutions database from within the PeopleSoft 8.4x content provider PeopleSoft Application Designer.

You *must* run the clean script and delete the PeopleSoft 8.4x content provider database server cache *before* using the Tools, Copy Project, To Database utility in PeopleSoft Application Designer.

---

4. Select the PeopleSoft 8.4x content provider portal project name that you just copied to file.

5. Click Open.

6. Click Select All.

7. Click Options.

    a. On the Copy Options tab, select *English* and *COMMON*.

        If your PeopleSoft Portal Solutions database is a multilingual database, then ensure that you also select the languages that you installed on your PeopleSoft Portal Solutions database.

    b. Click OK.

8. Click Copy.

9. Review the Output window on the Upgrade tab.

    All objects should copy successfully.

10. Close PeopleSoft Application Designer.

Note. You do *not* need to create or alter any records or views.

Task B-3-3: Deleting PeopleSoft Portal Solutions Database Cache

To refresh the web server cache and delete the application server cache:

Note. To view the changes to your PeopleSoft Portal Solutions Registry you must reboot the application server and clear the application server cache. In addition, you must also reboot the web server.

---

1. Stop the PeopleSoft Portal Solutions database web server.

2. Stop the PeopleSoft Portal Solutions database application server.

3. Purge the PeopleSoft Portal Solutions database application server cache.

4. Start the PeopleSoft Portal Solutions database application server.

5. Start the PeopleSoft Portal Solutions database web server.

Task B-4: Updating PeopleSoft Portal Registry Permissions

This section discusses:

• Updating PeopleSoft Portal Registry Lists

• Deleting PeopleSoft Portal Solutions Database Cache

Portal data from different PeopleSoft content provider databases may share a common portal folder. After you copy the registry projects, you must update the folder permissions to reflect the changes. After you update the folder permissions, you must delete the PeopleSoft Portal Solutions database cache files to reflect the changes.

Task B-4-1: Updating PeopleSoft Portal Registry Lists

To update the PeopleSoft portal registry permission lists:

Note. This process may take anywhere from a few minutes to a few hours, depending upon the volume of the PeopleSoft portal data. The user ID that invokes this process must have the Portal Administrator security role or the process may terminate in an abend.

1. In your PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Utilities, Sync Collection Security.

2. Add a run control ID of *SECURITY_SYNC_XXXXXXXX,* where *XXXXXXXX* represents the portal registry name.

    For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

3. Enter the portal name that matches the *XXXXXXXX* of the run control portal registry name.

    For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

4. Click Save.

5. Click Run.

6. Set up the Process Scheduler information and click OK.

7. Select the Process Monitor link to view the progress of the process.

Task B-4-2: Deleting PeopleSoft Portal Solutions Database Cache

To refresh the web server cache and delete the application server cache:

Note. To view the changes to your PeopleSoft Portal Solutions Registry you must reboot the application server and clear the application server cache. In addition, you must also reboot the web server.

1. Stop the PeopleSoft Portal Solutions database web server.

2. Stop the PeopleSoft Portal Solutions database application server.

3. Purge the PeopleSoft Portal Solutions database application server cache.

4. Start the PeopleSoft Portal Solutions database application server.

5. Start the PeopleSoft Portal Solutions database web server.

Task B-5: Updating PeopleSoft Portal Default Homepage

The copied PeopleSoft 8.4x content provider portal registry data includes registry entries for pagelets. To access the added pagelets from the homepage, the homepage tab definition must make these pagelets available.

To update the PeopleSoft default homepage tab:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

2. Select PeopleTools, Portal, Structure and Content.

3. Select Portal Objects, Homepage, Tabs.

4. Click the Edit link for the My Page tab content reference.

5. On the Tab Content tab, select the Include All check box for all pagelet categories, except for the PeopleSoft Applications pagelet category.

6. In the PeopleSoft Applications pagelet category group box, define the following settings:

    a. Clear the Menu pagelet check box.

    b. Select the Enterprise Menu pagelet check box and set the value to *Req-Fix.*

    c. Select all remaining pagelets check boxes and set their values to *Optional.*

7. Click Save.

APPENDIX C

Installing PeopleSoft CRM Navigation

This appendix discusses:

- Copying the PeopleSoft CRM_NAVFILTER Project

- Updating PeopleSoft Portal Registry Security

- Updating PeopleSoft Portal Registry Navigation

- Deleting PeopleSoft Portal Solutions Database Cache

Warning! Complete the tasks in this chapter after you have successfully copied the PeopleSoft CRM 8.9 or PeopleSoft 8.4x portal project into the PeopleSoft Portal Solutions database default EMPLOYEE portal definition. Do *not* perform the tasks in this appendix if you are using the single link access method to the currently supported PeopleSoft CRM releases on the PeopleSoft PeopleTools 8.4x database.

Do *not* perform the tasks in this appendix if the PeopleSoft Portal Solutions database default portal definition is not EMPLOYEE.

See "Accessing PeopleSoft Content Providers" in this installation guide.

See Appendix: Installing PeopleSoft 8.4x Portal Pack and Navigation Projects.

Task C-1: Copying the PeopleSoft CRM_NAVFILTER Project

This section discusses:

- Copying the Project to File

- Copying the Project from File

Task C-1-1: Copying the Project to File

To copy the project to file:

1. Sign on to your currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database in two-tier mode using PeopleSoft Application Designer.

2. Select File, Open.

3. In the Definition field, select *Project*.

4. Click Open, highlight the project *CRM_NAVFILTER*, and then click Open.

5. Select Tools, Copy Project, To File.

6. Click Browse for the Export Directory, and then navigate to a temporary directory and click OK.

7. Click Select All.

8. Click Copy.

9. Close PeopleSoft Application Designer.

Task C-1-2: Copying the Project from File

To copy the project from file:

1. Sign on to your PeopleSoft Portal Solutions database in two-tier mode using PeopleSoft Application Designer.

2. Select Tools, Copy Project, From File.

3. Browse to the PeopleSoft 8.4 content provider database server temporary directory.

   Note. If you cannot access the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database servers temporary directory, then copy the portal project folder *and* files from the temporary directory to the PeopleSoft Portal Solutions database server <*PS_APP_HOME*>\Projects directory.

4. Select the PeopleSoft CRM_NAVFILTER project name that you just copied to file.

5. Click Open.

6. Click Select All.

7. Click Options.

   a. On the Copy Options tab, select *English* and *COMMON*.

      If your PeopleSoft Portal Solutions database is a multilingual database, then you must also select the languages that you have installed on your PeopleSoft Portal Solutions database.

   b. Click OK.

8. Click Copy.

9. View the Output window on the Upgrade tab.

   All objects should copy successfully. Some warning messages such as `changed Action from CopyProp to Copy, defn doesn't exist on target` or `not copied, entire definition already copied` are expected and can be ignored.

10. Change the tablespace name for record RBF_NAV_SRTY.

    a. Open PeopleSoft Application Designer.

    b. Select File, Open.

    c. In the Definition field, select *Record*, and enter the string *RBF_NAV_SRTY* in the Name field, and then click Open.

    d. Select Tools, Data Administration, Set Tablespace.

    e. In the Available Space Name-DB Name field, select the item that begins with *EOLARGE* and click OK.

    f. Select File, Save.

11. Select Build, Project.

12. Select Build Options as Create tables.

13. Select Build Execute Options as Execute SQL now.

14. View the Build Output window to ensure that one record was processed with no errors.

15. Close PeopleSoft Application Designer.

Task C-2: Updating PeopleSoft Portal Registry Security

To update PeopleSoft portal registry security:

1. Copy the PORTAL_CR840_NAVSRTY.DMS file from the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database *<PS_APP_HOME>*\scripts directory to the PeopleSoft Portal Solutions database *<PS_APP_HOME>*\scripts directory.

2. Copy the PORTAL_CR840_NAVSRTY.DAT file from the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database *<PS_APP_HOME>*\data directory to the PeopleSoft Portal Solutions database *<PS_APP_HOME>*\data directory.

3. Use PeopleSoft Data Mover to sign on to the PeopleSoft Portal Solutions database in bootstrap mode.

4. Open the *<PS_APP_HOME>*\scripts\ PORTAL_CR840_NAVSRTY.dms script.

5. Carefully follow the directions as outlined in the PeopleSoft Data Mover script text.

6. If running DB2/OS390, add the following statement after `set input` and `set log` and before `import *`:

   ```
   SET EXECUTE_SQL SET CURRENT SQLID = 'OBJ#OWNER';
   ```

7. Run this script against the PeopleSoft Portal Solutions database by selecting File, Run Script.

8. View the Output window to ensure that rows have been inserted.

   For customers using PeopleSoft CRM 8.8 or 8.9, 24 rows will be inserted.

9. Close PeopleSoft Data Mover.

Task C-3: Updating PeopleSoft Portal Registry Navigation

To update the PeopleSoft portal registry navigation filter:

1. Copy the PORTAL_CR840_NAVFILTER.DMS file from the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database *<PS_APP_HOME>*\scripts directory to the PeopleSoft Portal Solutions database *<PS_APP_HOME>*\scripts directory.

2. Use PeopleSoft Data Mover to sign on to the PeopleSoft Portal Solutions database.

3. Open the *<PS_APP_HOME>*\scripts\ PORTAL_CR840_NAVFILTER.DMS script.

4. Carefully follow the directions as outlined in the PeopleSoft Data Mover script text.

5. Run this script against the PeopleSoft Portal Solutions database by selecting File, Run Script.

6. Close PeopleSoft Data Mover.

Task C-4: Deleting PeopleSoft Portal Solutions Database Cache

To delete the PeopleSoft Portal Solutions database cache:

1. Stop the PeopPeopleSoft Portal Solutions database web server.

2. Stop the PeopleSoft Portal Solutions database application server.

3. Purge the PeopleSoft Portal Solutions database application server cache.

4. Start the PeopleSoft Portal Solutions database application server.

5. Start the PeopleSoft Portal Solutions database web server.

APPENDIX D

Installing Services Procurement Navigation

This appendix discusses:

- Prerequisites

- Understanding Installation Results

- Updating PeopleSoft Portal Registry Security

- Resetting Node for Define Services Procurement

- Deleting PeopleSoft Portal Solutions Database Cache

Important! Perform these steps *only* if you are running Services Procurement using PeopleSoft Applications Portal, and only after the PeopleSoft Portal Solutions environment has been fully configured. Before you begin, you must copy all of the content references over to the PeopleSoft Portal Solutions database.

Prerequisites

Services Procurement Navigation installation instructions include running scripts from the PeopleSoft Applications Portal to access certain Services Procurement pages.

Before you begin, you must determine if:

1. Your installation has PeopleSoft Enterprise Project Costing installed.

2. Your installation uses PeopleSoft HCM Terminology in Services Procurement.

3. Your installation uses PeopleSoft Purchase Order integration with Services Procurement.

4. Your installation uses PeopleSoft Supplier Contracts integration with Services Procurement.

5. Your installation is defined to use the Region Tree Structure for defining the Service Region Hierarchy.

Your system administrator can reference the Products page (Set Up Financials/Supply Chain, Install, Installation Options, Products) to verify whether or not PeopleSoft Project Costing or Supplier Contracts is installed, and can also reference the Service Procurement Installation Options page (Services Procurement, Define Services Procurement, General Setup, Installation Options) to verify whether or not the Use HCM Terminology check box, PO Integration check box, PO Contract Integration check box, or Use Region Tree check box is selected.

Run the scripts in the following order:

1. spXXXpc.dms

2. spXXXhcm.dms

Warning! Do *not* run these scripts out of order. The spXXX hcm.dms scripts perform deletions that must not occur until the end of the process.

Understanding Installation Results

After the scripts run, the page links for VMS By BU Service Type and Approve Services Invoices are visible based on standard permission lists and roles security. The scripts remove logic that controlled the hiding of the VMS by BU Service Type and Approve Services Invoices page links. This logic was conditional and relied on tables within the PeopleSoft Financials and PeopleSoft SCM databases that are not available on the PeopleSoft Portal Solutions database.

Consequently, the script removal of the conditional logic and security to these pages is based solely on standard PeopleSoft PeopleTools permissions and roles, as defined on the PeopleSoft Applications Portal.

Oracle recommends that you review the permissions and role definition for these pages to ensure that they meet your security needs.

Task D-1: Updating PeopleSoft Portal Registry Security

To update PeopleSoft portal registry security:

1. Copy the spusepc.dms, spnopc.dms, spusehcm.dms, spnohcm.dms files from the FIN/SCM database *<PS_APP_HOME>*\scripts directory to the PeopleSoft Portal Solutions database *<PS_APP_HOME>*\scripts directory.

2. Use PeopleSoft Data Mover to sign on to the PeopleSoft Portal Solutions database in bootstrap mode.

3. If you have PeopleSoft Project Costing installed, open the *<PS_APP_HOME>*\scripts\spusepc.dms script.

   If you do not have PeopleSoft Project Costing installed, open the *<PS_APP_HOME>*\scripts\spnopc.dms script.

4. Follow the directions outlined in the PeopleSoft Data Mover Script text very carefully.

5. Run the script against the PeopleSoft Portal Solutions database by selecting File, Run Script.

6. View the output window to insure the rows have been inserted.

7. If you use PeopleSoft HCM Terminology within Services Procurement, open the *<PS_APP_HOME>*\scripts\spusehcm.dms script.

   If you do not use PeopleSoft HCM Terminology within Services Procurement, open the *<PS_APP_HOME>*\scripts\spnohcm.dms script.

8. Carefully follow the directions as outlined in the PeopleSoft Data Mover Script text.

9. Run the script against the PeopleSoft Portal Solutions database by selecting File, Run Script.

10. View the output window to ensure that the rows have been inserted and deleted.

11. Close PeopleSoft Data Mover.

Task D-2: Resetting Node for Define Services Procurement

The Define Services Procurement page in the PeopleSoft Portal registry contains the node that is used to locate the navigation collection that displays when you click the link. This must be reset to use the PeopleSoft Applications Portal navigation collection and the attributes that you modified in the previous task.

To reset the node for Define Services Procurement navigation collection:

1. Log on as the system administrator to your PeopleSoft Portal Solutions database, and then select PeopleTools, Portal, Structure and Content, Services Procurement.

   a. Locate the Define Services Procurement content reference that will have sequence number *0*.

   b. Click the Edit link.

2. The Content Reference Administration page displays.

   a. Locate the URL Information group box.

   b. In the Node Name field, enter *LOCAL_NODE*.

   c. Click Save.

   d. Exit out of the PeopleSoft Portal Solutions.

Task D-3: Deleting PeopleSoft Portal Solutions Database Cache

To delete the PeopleSoft Portal Solutions database cache:

1. Stop the PeopleSoft Portal Solutions database web server.

2. Stop the PeopleSoft Portal Solutions database application server.

3. Purge the PeopleSoft Portal Solutions database application server cache.

4. Start the PeopleSoft Portal Solutions database application server.

5. Start the PeopleSoft Portal Solutions database web server.

APPENDIX E

Creating Content Provider Navigation Collections (Recommended)

This appendix discusses:

- Understanding the Navigation Collections Creation Process
- Determining the Navigation Collection Names
- Determining the Navigation Collection Images
- Creating a Navigation Collection Project
- Copying Navigation Collections to Registries
- Copying Pagelet Wizard Definitions
- Updating Navigation Collection Links to Render Out
- Updating the Collection Page and Pagelet Node
- Updating Pagelet Wizard Definition and Portal Name

Understanding the Navigation Collections Creation Process

Loading the PeopleSoft Applications Portal with the content provider registry structures, using the *full navigation* load, does not include Navigation Collection definitions. This appendix gives a step-by-step guide to import the content provider navigation collections into the PeopleSoft Applications Portal, copy them to the created site, and update the navigation collection objects to enable rendering them from the PeopleSoft Applications Portal in the created site. The net result is that the Navigation Collection definition and the navigation page from your content provider are maintained in the PeopleSoft Portal Solutions database, as well as updated in and rendered out of the PeopleSoft Applications Portal. The content reference links in the navigation collections are still rendered out of the content provider database.

Note. This appendix assumes that a *full navigation* load for the portal registry structures has been made from the content provider database into the PeopleSoft Applications Portal. This appendix also assumes the full navigation folders have been copied to the created site in the PeopleSoft Applications Portal.

The following is an overview of the tasks that are necessary. More explicit directions for each step are given later in the appendix:

1. Determine the name of the Navigation Collection definitions that you want to copy.

2. Create a PeopleSoft Application Designer project in the content provider database that contains the delivered Navigation Collection definition objects and images.

3. Export the project from the content provider database using Copy Project to File.

4. Import the project into the PeopleSoft Portal Solutions database using Copy Project from File.

5. Copy the delivered Navigation Collection definitions using Structure and Content from the delivered site (for example, EMPLOYEE, CUSTOMER, SUPPLIER) into the created site in the PeopleSoft Portal Solutions database.

6. Export Pagelet Wizard definitions for Navigation Collection pagelets from the content provider and import them into the PeopleSoft Applications Portal using Data Mover.

7. Update the content provider delivered Navigation Collection links (in the PeopleSoft Applications Portal) to reference the PeopleSoft Applications Portal created site name.

8. Update the content provider delivered Navigation Pages (in the PeopleSoft Applications Portal) to render from the PeopleSoft Portal Solutions, not the content provider.

9. Update the content provider delivered Navigation Pagelets (in the PeopleSoft Applications Portal) to render from the PeopleSoft Portal Solutions, not the content provider.

If you have a development content provider database that has the same navigation collections as your production database, you can perform tasks 1 and 2 from the development database.

If you have a development PeopleSoft Portal Solutions database that has the same portal names and registry structures as your production database, you can perform tasks 3 through 6 on the development database.

To move the updated navigation collection definitions and navigation pages into your production database, you can create a project that contains these objects in your PeopleSoft Portal Solutions development database, and then copy that project into your PeopleSoft Portal Solutions production database.

Note. After you copy a project that contains portal registry structures into a database, you must delete the application server cache, and then stop and restart both your web server and the application server.

Task E-1: Determining the Navigation Collection Names

Before you can determine the Navigation Collection names, you should understand the naming conventions for Navigation Collections objects.

Any collections (along with all related attributes—for example, labels, descriptions, icons, sequencing) can be copied/upgraded using PeopleSoft Application Designer.

The Navigation Collections objects are portal registry structures that are automatically generated by the Navigation Collection utility. These registry structures follow the required naming conventions. It is difficult to distinguish individual collection registry objects by the object name alone, due to the nature of the automatic generation.

The following lists the collection objects and how you can distinguish between them:

- <pppp> — This is a two character database prefix, with a maximum of four allowed. For example, PA, HC, EP, CR, and PF.

  This value is stored on the Portal Utilities System Option page, but is updated to ADMN on shipped databases.

- <collection name> — The entered name for the collection upon creation.

  The label can be changed. The first entry saved is used for the object name and cannot be changed.

- <unique suffix> — If the object name already exists in the current portal registry definition, a numeric suffix is appended to make it unique.

- <datetimestamp> — The creation system date-time at time to the second, as a string: *yyyymmddhhmmss*.

- <random number> — A ten digit random number, suffixed for additional uniqueness.

The following table lists the registry structure, naming convention, reference type, and an example:

Registry Structure	Naming Convention	Reference Type	Example
Collection	<pppp>_<collection name>_<unique suffix>	F	EO_TEST_COLLECTION
Folder	<pppp>_ F<datetimestamp><random number>	F	EO_F2003042516415641 03213599
Content	<pppp>_ S<datetimestamp><random number>	C	EO _S20030506120234454 5121616
Published Navigation Page	<pppp>_SC_SP_ <collection name>	C	EO _SC_SP_TEST_COLLECTION
Published Pagelet Wizard Pagelet	<pppp> _<collection name>_HMPG	None	EO_TEST_COLLECTION _HMPG
Published Navigation Collection Pagelet	<pppp>_SC_ PGT_<collection name>	None	EO_SC_PGT_ TEST_COLLECTION

In addition, Navigation Collections can be defined with images that overwrite the default images. These images use the naming convention PS_FN_<image identifier>.

Navigation Collections are stored in the common parent folder CO_NAVIGATION_COLLECTIONS in the portal registry.

To determine the Navigation Collection names:

1. Use a SQL query tool to access the content provider database.

2. Run the following SQL query to retrieve the Navigation Collection names.

   The listed values under the column PORTAL_OBJNAME are the Navigation Collection names. The PORTAL_NAME is where the Navigation Collection resides.

   Replace the string <*PREFIX*> with the prefix used on delivered content provider's portal registry structures, for example, HC, EP, CR, PF.

```
SELECT PORTAL_NAME, PORTAL_OBJNAME FROM PSPRSMDEFN
WHERE PORTAL_PRNTOBJNAME = 'CO_NAVIGATION_COLLECTIONS'
AND PORTAL_REFTYPE = 'F'
AND PORTAL_OBJNAME LIKE '<PREFIX>%'
```

Task E-2: Determining the Navigation Collection Images

Navigation Collection images are listed as an attribute on the portal registry structure. The attributes are part of the registry structure managed object, however, the image itself is a separate object that must be included in the project definition to be copied.

Note. Navigation images can be listed on the Navigation Collection definition objects as well as on normal portal registry folders. To ensure the same end-user experience, include all images listed on any content reference attribute. Do not include the common PeopleSoft PeopleTools or PeopleSoft Enterprise Components images, since these already exist in the PeopleSoft Applications Portal and should not be overwritten.

To determine the Navigation Collection images:

1. Use a SQL query tool to access the content provider database.

2. Run the following SQL query to retrieve the Navigation Collection image names.

   The listed values under the column PORTAL_ATTR_VAL are the image names used on a Navigation Collection object.

   The attribute value is stored as a long char in the database.

   Not all database platforms allow a distinct clause on the fetched column value, so you may get duplicate results from the query.

   Replace the string *<PREFIX>* with the prefix used on delivered content provider portal registry structures, for example, HC, EP, CR, PF.

   ```
   SELECT PORTAL_ATTR_VAL FROM PSPRSMSYSATTRVL
   WHERE PORTAL_ATTR_NAM = 'PTPP_IMAGE'
   AND PORTAL_OBJNAME LIKE '<PREFIX>%'
   ```

Task E-3: Creating a Navigation Collection Project

To create a navigation collection project:

1. Log on to your PeopleSoft content provider database in two-tier.

2. Open PeopleSoft Application Designer and select File, New.

3. Select *Project* as the new definition. Click OK.

4. Select Insert, Definitions into Project.

5. Select the Definition Type of *Portal Registry Structures*.

6. Enter the Portal Name where the Navigation Collection resides.

   Enter the content provider portal registry prefix to limit the results. Click *Enter*.

7. Scan the results for the folder that matches your collection name, and then click the collection object name.

8. Click *Include Children* in the Related Definitions.

9. Click *Insert*.

10. Click *Close*.

11. Review your results by clicking on the Application Designer Upgrade tab and double-clicking the Portal Registry Structures object type.

12. Select Insert, Definitions into Project.

13. Select the Definition Type of *Images*.

14. Enter the Navigation Collection prefix PS_FN to limit the results, and then click *Enter*.

15. Scan the results for the image names that match your Navigation Collection image names.

    These are the names that were returned in the PORTAL_ATTR_VAL column in the previous task.

16. Click the image name and then click Insert.

    Repeat for each image name that you want to include in the project, and then click Close.

17. Select File, Save Project As, and specify a project name.

18. Select Tools, Copy Project, To File…

    Note. If your content provider and PeopleSoft Portal Solutions database is on the same PeopleSoft PeopleTools release, you can do a direct Copy Project, To Database…

    ---

19. In the PeopleSoft Portal Solutions database, open PeopleSoft Application Designer.

20. Select File, New. For the Definition Type, select *Project*. Click OK.

21. Select Tools, Copy Project, From File…

22. Select the Navigation Collection project that you just copied to file.

23. Click Open.

24. Click Select All.

25. Click Options.

    a. On the Copy Options tab, select English and COMMON.

       If your PeopleSoft Portal Solutions database is a multilingual database, then you must also select the languages that you have installed on your PeopleSoft Portal Solutions database.

    b. Click OK.

26. Click Copy.

27. Review the Output window on the Upgrade tab.

    All objects should copy successfully.

28. Close PeopleSoft Application Designer.

    Note. You do not need to create or alter any records or views.

Note. After you copy a project that contains portal registry structures into a database, you must delete the application server cache and stop and restart both your application server and web server for the target database.

Task E-4: Copying Navigation Collections to Registries

To access Navigation Collections in a delivered PeopleSoft portal registry from the PeopleSoft Applications Portal created site, you must copy the Navigation Collection definitions to the new site.

To copy Navigation Collections to a different portal registry:

1. From your browser, sign on to the PeopleSoft Portal Solutions database.

Note. To access portal registries other than the default EMPLOYEE Portal, adjust the browser address to the desired registry name.

For example, replace /EMPLOYEE/ with /CUSTOMER/ or /SUPPLIER/.

---

2. Select PeopleTools, Portal, Structure and Content.

3. In the Structure and Content page, click the Portal Objects link.

4. In the Portal Objects Structure and Content page, click the Navigation Collections link.

5. Repeat the following for each Navigation Collection that you want to access as a Navigation page from the PeopleSoft Applications Portal.

   a. In the Navigation Collections Structure and Content page, click the Edit link next to the Navigation Collection folder label.

   b. In the Folder Administration page on the navigation collection, click Copy Object.

   c. In the Copy Object to a Different Portal Registry page, select the Recurse subfolders check box.

   d. Click the tree folder icons to <My New Site> (for example, HRSITE.), and then select Portal Objects, Navigation Collections. Click the Navigation Collections folder link in the tree list, as illustrated in the example below.

Copy Object To a Different Portal Registry

Object to Copy: Navigation Collections

Click the registry name you wish to copy this object to and pick a parent folder to copy it under.

Click "Cancel" to exit and not copy the current object.

☑ **Recurse subfolders?**

Left | Right

⊞ SUPPLIER
⊞ PS_SITETEMPLATE
⊞ PORTAL
⊞ PARTNER
⊞ MOBILE
📂 HRSITE
　　📂 My Favorites
　　📂 Portal Objects
　　　　⊞ Homepage
　　　　📂 Navigation Collections
　　　　　　⊞ Integration Network WorkCenter
　　　　　　⊞ Main Menu
　　　　　　⊞ Site Manager Center
　　　　　　⊞ Site Publisher Center

Copy Object page

   e. In the Copy Confirmation page, click Yes – Copy.

f. In the Save Confirmation page, click OK.

g. In the Copy Object to a Different Portal Registry page, click the *Navigation Collections* link to return to the Structure and Content page. Click the Cancel button to continue on the popup message.

6. Repeat step 5 for any additional Navigation Collections definitions.

Task E-5: Copying Pagelet Wizard Definitions

To access Navigation Collection Pagelets in a delivered portal registry from the Applications Portal created site, you must move the Navigation Collection Pagelet definitions to the new site. Use the following steps to copy pagelet wizard definitions if the PeopleSoft content provider database and the PeopleSoft Portal Solutions database are running on the same version of PeopleSoft PeopleTools.

If the PeopleSoft content provider database and the PeopleSoft Portal Solutions database are not running the same version of PeopleSoft PeopleTools, you must manually create these pagelets in the PeopleSoft Applications Portal created site.

To copy pagelet wizard definitions:

1. From your browser, sign on to the content provider database.

2. Select PeopleTools, Portal, Pagelet Wizard, Export/Import Pagelets.

3. For the data type, select Navigation Collection.

4. Click *Search*.

5. Select the content provider Pagelet Wizard pagelet definitions that you want to copy.

   The Pagelet ID should begin with the content provider prefix, but is not required to do so.

6. Click Generate Scripts.

7. Log on to PeopleSoft Data Mover for the content provider database.

8. Copy and paste the entire generated export script text into PeopleSoft Data Mover and run the script.

9. Copy the resulting .dat file to the PeopleSoft Data Mover Input Directory for the PeopleSoft Portal Solutions database, as defined in the PeopleSoft Configuration Manager.

10. Log on to PeopleSoft Data Mover for the PeopleSoft Portal Solutions database.

11. Copy and paste the entire generated import script text into PeopleSoft Data Mover and run the script.

See PeopleTools: PeopleTools Portal Technologies PeopleBook,, "Working with Navigation Pages," for your current PeopleTools release.

See PeopleTools: PeopleTools Portal Technologies PeopleBook, "Using Pagelet Wizard to Create and Manage Pagelets," for your current PeopleTools release.

Task E-6: Updating Navigation Collection Links to Render Out

To update the Navigation Collection Link Portal:

Note. The copied content provider Navigation Collection links are *likely* defined to render from the portal where they were created. The link portal name must be set to render out of the current portal, instead of the original portal name.

1. Use a SQL query/update tool to access the PeopleSoft Portal Solutions database.

2. Run the following SQL query statement to check the rows that you will be updating.

   Replace the string *<MY_NEW_SITE>* with the portal name of the site created.

   Replace the string *<PREFIX>* with the prefix used on delivered content provider portal registry structures, for example, HC, EP, CR, PF.

   ```
   SELECT * FROM PSPRSMDEFN
   WHERE PORTAL_NAME = '<MY_NEW_SITE>'
   AND PORTAL_OBJNAME LIKE '<PREFIX>%'
   AND PORTAL_PRODUCT = 'CFAN'
   AND PORTAL_CREF_USGT = 'LINK'
   ```

3. Run the following SQL update statement to update the link portal name.

   Replace the string *<MY_NEW_SITE>* with the portal name of the site created.

   Replace the string *<PREFIX>* with the prefix used on delivered PeopleSoft content provider portal registry structures.

   For example, HC, EP, CR, PF, and so on.

   ```
   UPDATE PSPRSMDEFN SET PORTAL_LINK_PORTAL = PORTAL_NAME
   WHERE PORTAL_NAME = '<MY_NEW_SITE>'
   AND PORTAL_OBJNAME LIKE '<PREFIX>%'
   AND PORTAL_PRODUCT = 'CFAN'
   AND PORTAL_CREF_USGT = 'LINK'
   ```

Task E-7: Updating the Collection Page and Pagelet Node

To update the Navigation Collection page and PeopleSoft pagelet content provider node:

Note. The content provider Navigation pages and pagelets are delivered to render out of the content provider database. This is determined by the content reference node name. Since the full navigation exists in the new site, you must set the published navigation pages and pagelets to render out of the PeopleSoft Portal Solutions database, not the PeopleSoft content provider.

1. Use a SQL query and update tool to access the PeopleSoft Portal Solutions database.

2. Run the following SQL query statement to check the rows that you will be updating.

   Replace the string *<MY_NEW_SITE>* with the portal name of the site created.

   Replace the string *<PREFIX>* with the prefix used on delivered PeopleSoft Portal registry objects.

   For example, HC, EP, CR, PF.

   ```
   SELECT * FROM PSPRSMDEFN
   ```

```
WHERE PORTAL_NAME = '<MY_NEW_SITE>'
AND PORTAL_OBJNAME LIKE '<PREFIX>%'
AND PORTAL_PRODUCT = 'CFAN'
AND PORTAL_CREF_USGT <> 'LINK'
AND PORTAL_REFTYPE = 'C'
```

3. Run the following SQL update statement to update the published Navigation page.

   Replace the string *<MY_NEW_SITE>* with the portal name of the site created.

   Replace the string *<PREFIX>* with the prefix used on delivered PeopleSoft Portal registry objects.

   For example, HC, EP, CR.

```
UPDATE PSPRSMDEFN SET PORTAL_CNTPRV_NAM = 'LOCAL_NODE'
WHERE PORTAL_NAME = '<MY_NEW_SITE>'
AND PORTAL_OBJNAME LIKE '<PREFIX>%'
AND PORTAL_PRODUCT = 'CFAN'
AND PORTAL_CREF_USGT <> 'LINK'
AND PORTAL_REFTYPE = 'C'
```

Note. After you update the PeopleSoft portal registry structures, you must delete the application server cache, and then stop and restart both your web server and your application server.

Task E-8: Updating Pagelet Wizard Definition and Portal Name

To update the Pagelet Wizard definition Navigation Collection portal name:

Note. The Pagelet Wizard definition stores the Navigation Collection name and portal name to determine which Navigation Collection to render. This information is stored in Pagelet Wizard data settings and parameters. The copied PeopleSoft content provider Pagelet Wizard definitions are likely defined to render from the portal where they were created. The portal name must be set to render out of the current portal, instead of the original portal name.

1. Use a SQL query and update tool to access the PeopleSoft Portal Solutions database.

2. Run the following SQL query statements to check the rows that you will be updating.

   Review the results to see that they match the Pagelet IDs in the generated export script.

   Replace the string *<PREFIX>* with the prefix used on delivered PeopleSoft Portal registry objects.

   For example, HC, EP, CR, PF.

```
SELECT * FROM PS_PTPPB_DS_SETTGS
WHERE PTPPB_FIELDNAME = 'PortalName'
AND EXISTS
(SELECT 'X' FROM PS_PTPPB_DS_SETTGS A
WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_DS_SETTGS.PTPPB_PAGELET_ID
AND A.PTPPB_FIELDNAME = 'scname'
AND A.PTPPB_VALUE LIKE '<PREFIX>%')


SELECT * FROM PS_PTPPB_PGLT_PRMS
```

```
WHERE PTPPB_FIELDNAME = 'PortalName'
AND EXISTS
(SELECT 'X' FROM PS_PTPPB_PGLT_PRMS A
WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_PGLT_PRMS.PTPPB_PAGELET_ID
AND A.PTPPB_FIELDNAME = 'scname'
AND A.PTPPB_VALUE LIKE '<PREFIX>%')
```

3. Run the following SQL update statements to update the Pagelet Wizard data setting and parameter for the PortalName value.

   Replace the string *<PREFIX>* with the prefix that was used on the delivered PeopleSoft Portal registry objects.

   For example, HC, EP, CR, PF.

```
UPDATE PS_PTPPB_DS_SETTGS
SET PTPPB_VALUE='LOCAL_PORTAL'
WHERE PTPPB_FIELDNAME = 'PortalName'
AND EXISTS
(SELECT 'X' FROM PS_PTPPB_DS_SETTGS A
WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_DS_SETTGS.PTPPB_PAGELET_ID
AND A.PTPPB_FIELDNAME = 'scname'
AND A.PTPPB_VALUE LIKE '<PREFIX>%')


UPDATE PS_PTPPB_PGLT_PRMS
SET PTPPB_VALUE='LOCAL_PORTAL'
WHERE PTPPB_FIELDNAME = 'PortalName'
AND EXISTS
(SELECT 'X' FROM PS_PTPPB_PGLT_PRMS A
WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_PGLT_PRMS.PTPPB_PAGELET_ID
AND A.PTPPB_FIELDNAME = 'scname'
AND A.PTPPB_VALUE LIKE '<PREFIX>%')
```

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