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PeopleSoft Human Capital Management and Campus Solutions 9.0 Revision 5 Installation Guide

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Contents

Preface

About This Documentation.....	vii
Understanding This Documentation.....	vii
Audience.....	vii
Typographical Conventions.....	viii
Products.....	ix
Related Information.....	x
Comments and Suggestions.....	x

Chapter 1

Installing PeopleSoft HCM 9.0 Applications.....	1
Preparing for the PeopleSoft HCM Installation.....	1
Verifying the PeopleTools Version.....	2
Verifying the Demo Database Size.....	2
Running the HRINSSYS.DMS Script.....	2
Running the HC9MAINTLOG_I.DMS Script.....	3
Verifying the EDM Pool Size.....	3
Re-Ordering the Steps in PeopleTools Installation for DB2 z/OS Only.....	3
Reviewing PeopleSoft Campus Solutions COBOL on DB2 z/OS.....	4
Installing PeopleSoft HCM for the U.S. Federal Government.....	4
Installing PeopleSoft HCM for Education and Government.....	6
Installing PeopleSoft HCM for Military Customers.....	6
Installing PeopleSoft HCM for Japan.....	8
Using Global Search.....	8
Configuring Phone and FAX Number Fields.....	9
Printing Japanese Characters on SQR Reports.....	9
Installing PeopleSoft HCM for Switzerland.....	10
Installing PeopleSoft Time and Labor.....	10
Creating Time Zone Offsets.....	10
Installing PeopleSoft Absence Management and PeopleSoft Global Payroll Core.....	11
Verifying Installation Settings for PeopleSoft Absence Management.....	11
Updating Process and Job Definitions for PeopleSoft Packager.....	12
Installing PeopleSoft HCM Portal Pack.....	13
Installing PeopleSoft Talent Acquisition Manager.....	14

Installing PeopleSoft Global Payroll Country Extensions.....	14
Understanding the PeopleSoft Global Payroll Country Extensions Installation.....	15
Updating Installation Indicators.....	15
Running the GPCE SYS.DMS Script to Update Stored Installation Indicators.....	16
Running the GPCERATE_EXP.DMS / GPCERATE_IMP.DMS Scripts to Copy HR Rate Codes.....	16
Installing PeopleSoft ePay Payslips for PeopleSoft Global Payroll.....	17
Understanding the PeopleSoft ePay Payslips Installation.....	17
Installing the PeopleSoft ePay Payslips Functionality.....	17
Installing Process Schedulers on MVS Platforms.....	19
Modifying the JVM Configuration to Increase Heap Size.....	19
Installing PeopleSoft HR Spain and PeopleSoft Global Payroll Germany/Switzerland PDF Form Files.....	20
Installing PeopleSoft Directory Interface.....	22
Prerequisites.....	22
Verifying the Installation Options for PeopleSoft Directory Interface.....	22
Backing up the Directory Server and Database.....	22
Running PeopleSoft Data Mover Scripts.....	22
Installing PeopleSoft Payroll Interface for ADP Connection.....	23
Verifying the Installation Options for PeopleSoft Payroll Interface for ADP Connection.....	23
Running the PeopleSoft Payroll ADP Connection Installation Script.....	24
Installing PeopleSoft Pay/Bill Management.....	24
Installing Service Handlers.....	25
Installing Configurable Matrices and Metadata.....	26
Installing PeopleSoft Human Resources for French Public Sector.....	27

Chapter 2

Installing PeopleSoft Campus Solutions 9.0 Applications.....	29
Setting Up Equation Engine Security.....	29
Transferring and Compiling Additional Component COBOL for PeopleSoft Student Administration.	29
Using Additional Component COBOL for PeopleSoft Student Administration.....	30
Compiling Additional Component COBOL on Microsoft Windows NT/2000.....	31
Compiling Additional Component COBOL on UNIX.....	33
Installing Database Audit Triggers for PeopleSoft Student Records.....	33
Understanding Database Audit Triggers.....	33
Using Audit Triggers.....	33
Installing the Audit Triggers.....	34
Adjusting PeopleTools EDI Manager for Financial Aid Processes.....	35
Updating the ECOUTMAP.SQC File.....	35
Modifying the ECIN0001.SQR File.....	36

Using CPU Space for PeopleSoft Academic Advising.....	37
Running the SFA_ECQUEUE_TABLES_RESET Script.....	37
Configuring Your PeopleBooks Documentation Website.....	37
Using the User Profiles Management Result Table.....	37
Understanding the Audience for this Information.....	37
Using the User Profiles Management Clean Up Pages.....	38
Installing PeopleSoft Student Administration Integration Pack.....	40
Setting Up Installation Options.....	41
Installing Additional Database Changes Using PeopleSoft Data Mover.....	41
Running Conversion Programs Using PeopleSoft Application Engine.....	42
Activating PeopleSoft Student Administration Integration Pack Service Operations and Handlers.....	42
Activating PeopleSoft Student Administration Integration Pack Service Routings.....	50
Activating PeopleSoft Student Administration Integration Pack Queues.....	54
Installing PeopleSoft Contributor Relations.....	54
Index	55

About This Documentation

This preface discusses:

- Understanding This Documentation
- Audience
- Typographical Conventions
- Products
- Related Information
- Comments and Suggestions

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

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

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

Products

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 Pay/Bill Management
- Oracle's PeopleSoft PeopleTools
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Portal Solutions
- Oracle's PeopleSoft 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: Getting Started with PeopleTools PeopleBook 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

Installing PeopleSoft HCM 9.0 Applications

This chapter discusses:

- Preparing for the PeopleSoft HCM Installation
- Installing PeopleSoft HCM for the U.S. Federal Government
- Installing PeopleSoft HCM for Education and Government
- Installing PeopleSoft HCM for Military Customers
- Installing PeopleSoft HCM for Japan
- Installing PeopleSoft HCM for Switzerland
- Installing PeopleSoft Time and Labor
- Installing PeopleSoft Absence Management and PeopleSoft Global Payroll Core
- Installing PeopleSoft HCM Portal Pack
- Installing PeopleSoft Talent Acquisition Manager
- Installing PeopleSoft Global Payroll Country Extensions
- Installing PeopleSoft ePay Payslips for PeopleSoft Global Payroll
- Installing PeopleSoft HR Spain and PeopleSoft Global Payroll Germany/Switzerland PDF Form Files
- Installing PeopleSoft Directory Interface
- Installing PeopleSoft Payroll Interface for ADP Connection
- Installing PeopleSoft Pay/Bill Management
- Installing Service Handlers
- Installing Configurable Matrices and Metadata
- Installing PeopleSoft Human Resources for French Public Sector

This chapter provides pre-installation considerations, and installation notes and instructions specific to PeopleSoft HCM applications. Installation notes are tips about a specific issue in a product, whereas installation instructions are step-by-step instructions on how to install a PeopleSoft HCM product.

Preparing for the PeopleSoft HCM Installation

This section discusses:

- Verifying the PeopleTools Version

- Verifying the Demo Database Size
- Running the HRINSSYS.DMS Script
- Running the HC9MAINTLOG_I.DMS Script
- Verifying the EDM Pool Size
- Re-Ordering the Steps in PeopleTools Installation for DB2 z/OS Only
- Reviewing PeopleSoft Campus Solutions COBOL on DB2 z/OS

Verifying the PeopleTools Version

All new installs of PeopleSoft HRCS 9.0 require PeopleTools 8.52.03 or higher. For upgrade customers, please check the Upgrade Home Page for the PeopleTools requirements for your specific upgrade path.

Important! This document is not a stand-alone installation guide. It does not contain PeopleTools installation instructions. When installing PeopleSoft HCM, be sure to use both the PeopleTools Installation Guide for your database platform and these supplemental PeopleSoft HCM installation instructions. The PeopleTools Installation Guide is available on My Oracle Support

See PeopleSoft PeopleTools Installation guide for your database platform and for your current PeopleTools release, available on My Oracle Support.

Verifying the Demo Database Size

The following table lists the approximate PeopleSoft HCM 9.0 Demo database size for each RDBMS platform.

RDBMS Platform	Approximate Database Size
Oracle — ANSI	24.4 GB
Oracle — Unicode	24.8 GB
DB2/UNIX — ANSI	22 GB
DB2/UNIX — Unicode	37 GB
DB2 z/OS Non-Unicode	22 GB
DB2 z/OS Unicode	26 GB
Sybase ANSI	18 GB
Informix	12.07 GB
Microsoft SQL Server	4.36 GB
Microsoft SQL Server — Unicode	5.9 GB

Running the HRINSSYS.DMS Script

Use PeopleSoft Data Mover to run this script against the PeopleSoft HRMS SYS database *only*. You can find the HRINSSYS.DMS script in <PS_HOME>\scripts. You then need to log off all clients, shut down and restart all application servers after running this script.

Use PeopleSoft DataMover to run this script against the HRMS SYS database *only*. You can find the HRINSSYS.DMS script in <PS_HOME>\scripts. You then need to log off all clients, shut down, and restart all application servers after running this script. The script is currently set to *PIN_NUM_LAST=10000*. After running the script, you need to update the *PIN_NUM_LAST* in the PS_INSTALLATION table with the maximum *PIN_NUM* from the PS_GP_PIN table, to set, compare and update.

Running the HC9MAINTLOG_I.DMS Script

Run this script using PeopleSoft Data Mover against the PeopleSoft HCM and Campus Solutions database being installed. This script loads PeopleSoft HRCS 9.0 Multi-Lingual update IDs to the PS_MAINTENANCE_LOG table. The HC9MAINTLOG_I.DMS script is located in <PS_HOME>\scripts. You do *not* need to log off all clients and shut down all application servers after running this script.

Verifying the EDM Pool Size

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

Re-Ordering the Steps in PeopleTools Installation for DB2 z/OS Only

For DB2/zOS - PeopleSoft HRMS 9.0, the order of steps performed in the "Creating a Database" chapter of the PeopleTools installation guide changes if you are installing a demo database.

See *PeopleSoft PeopleTools Installation guide for DB2 UDB z/OS and for your current PeopleTools release*, "Creating a Database."

Before performing the task "Running PeopleSoft Data Mover Import Scripts," the <DBNAME>dbo.dms script needs to be edited. Edit the script <DBNAME>dbo.dms and create two different DMS scripts from the original.

Note. This modification is necessary because the PeopleSoft HRMS Demo database has some duplicate data definitions and indexes that need to be created before loading the Demo database so that duplicates can be avoided.

1. Search for the key word `hcengl.log` in <DBNAME>dbo.dms.
2. Cut the portion of the script from the line that contains `hcengl.log` to the end of script and paste it into a different script called <DBNAME>dbo_2.dms.
3. Save the original <DBNAME>dbo.dms script after removing the portion of script from the line that has the key word `hcengl.log` to the end of the script.
4. At this stage, make sure that the original <DBNAME>dbo.dms script contains only the import from `hcengs.db` and that <DBNAME>dbo_2.dms contains the rest of the import and updates.
5. Run the <DBNAME>dbo.dms script in bootstrap mode.

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

See PeopleSoft PeopleTools Installation guide for your database platform, "Creating a Database" and for your current PeopleTools release, available on My Oracle Support.

6. Run the step to create indexes by following the instructions in the task "Creating Indexes."
7. Run the <DBNAME>dbo_2.dms script by following the instructions in the task "Running PeopleSoft Data Mover Import Scripts."

Reviewing PeopleSoft Campus Solutions COBOL on DB2 z/OS

PeopleSoft Campus Solutions 9.0 is no longer supported on the IBM z/OS platform. The COBOL programs in the following list are for the PeopleSoft Campus Solutions product, and will not compile successfully for customers running DB2 on the z/OS platform.

- FAPINAS0
- FAPINAS1
- FAPINAS2
- FAPINAS3
- FAPINAS5
- FAPINAS6
- FAPINAS7
- FAPINAS8
- FAPINAS9
- IMPLUS04
- IMPLUS05
- IMPLUS06
- IMPLUS07
- IMPLUS08
- IMPLUS09
- IMPLUS10
- IMPLUS11
- IMPLUS12

DB2 z/OS customers should do one of the following:

- Comment out the JCL compile steps for these programs in the JCLLIB(PSCOB*) PDS members prior to COBOL compile execution.
- Take no action and simply ignore the COBOL compile errors for the previously listed programs.

Task 1-1: Installing PeopleSoft HCM for the U.S. Federal Government

This section describes the system data set up process that users of PeopleSoft HCM for the U.S. Federal Government should run to ensure proper installation of Federal functionality.

To install Federal functionality in a PeopleSoft HRMS Database:

1. Select Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Data Federalization.

- Click the Federalize System Data button to load the contents of the core tables that are to contain Federal Data.
- Since running the Federalization process induces changes to the Installation Table, you will receive the informational message that follows.

You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.

Data Federalization Process

Set Federal Data

The database was federalized at 2006-09-28-09.22.20.000000.
You must restart the application server for certain values to take affect.

Federalize System Data

Set Commercial Data

By clicking this Button, all the data in the following list of tables will be reset to Commercial data.

Commercialize System Data

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

Data Federalization Process page

- Select Set Up HRMS, Install, Installation Table, and the select the HRMS Options tab.
To verify that the Federal values and settings have been applied, ensure that the Position Management Option radio button is set to Full and the Multi-Step Grade check box in the Compensation Rate Codes group box is selected.
- Select the Product Specific tab, and confirm that the Default Pay Basis in the Federal Functionality box is set to *Per Annum*.

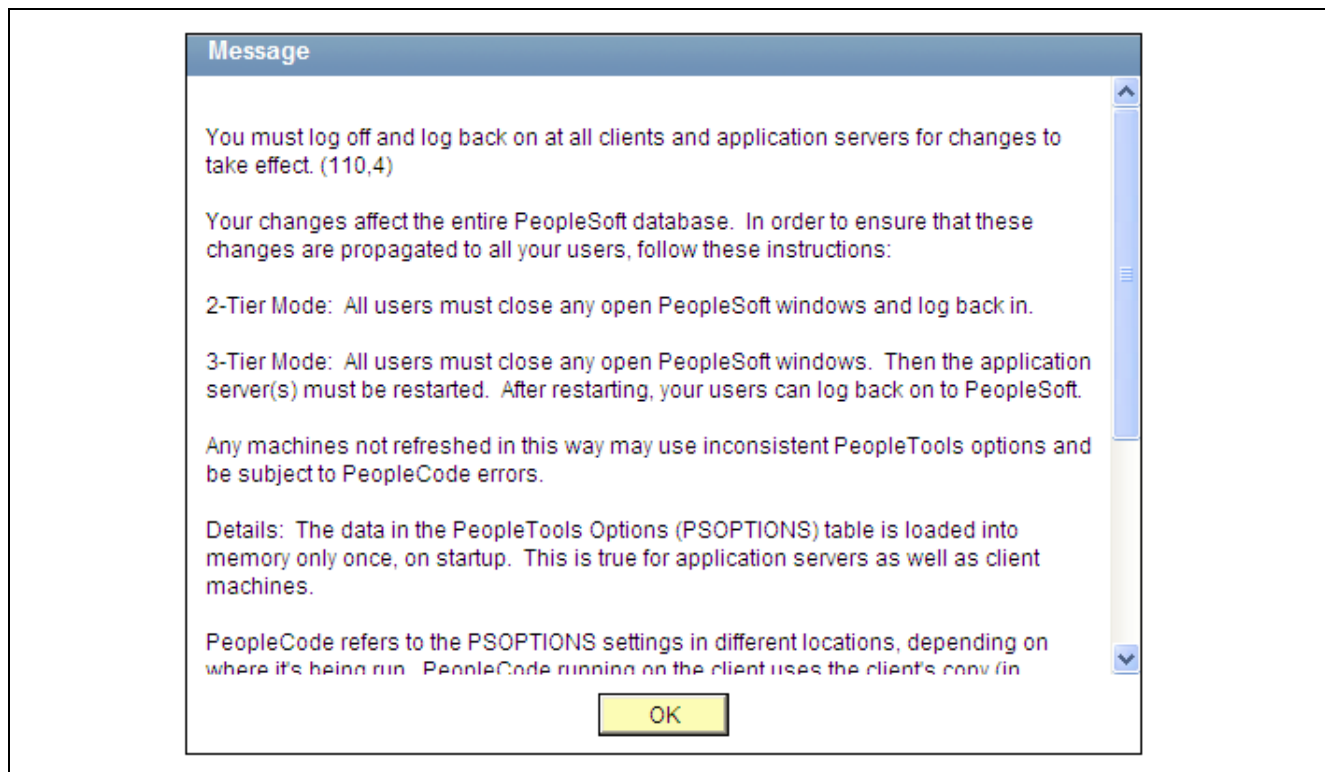
These steps must be run against the SYS and DEMO databases.

Task 1-2: Installing PeopleSoft HCM for Education and Government

Human Resources for Education and Government customers should ensure that the Education and Government setting is enabled on the Installation Table in order to have access to specific Education and Government functionality.

Select Set Up HRMS, Install, Installation Table and verify that the Education and Government check box is selected.

If it was necessary to make any changes to the Installation Table, you will receive the informational message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.



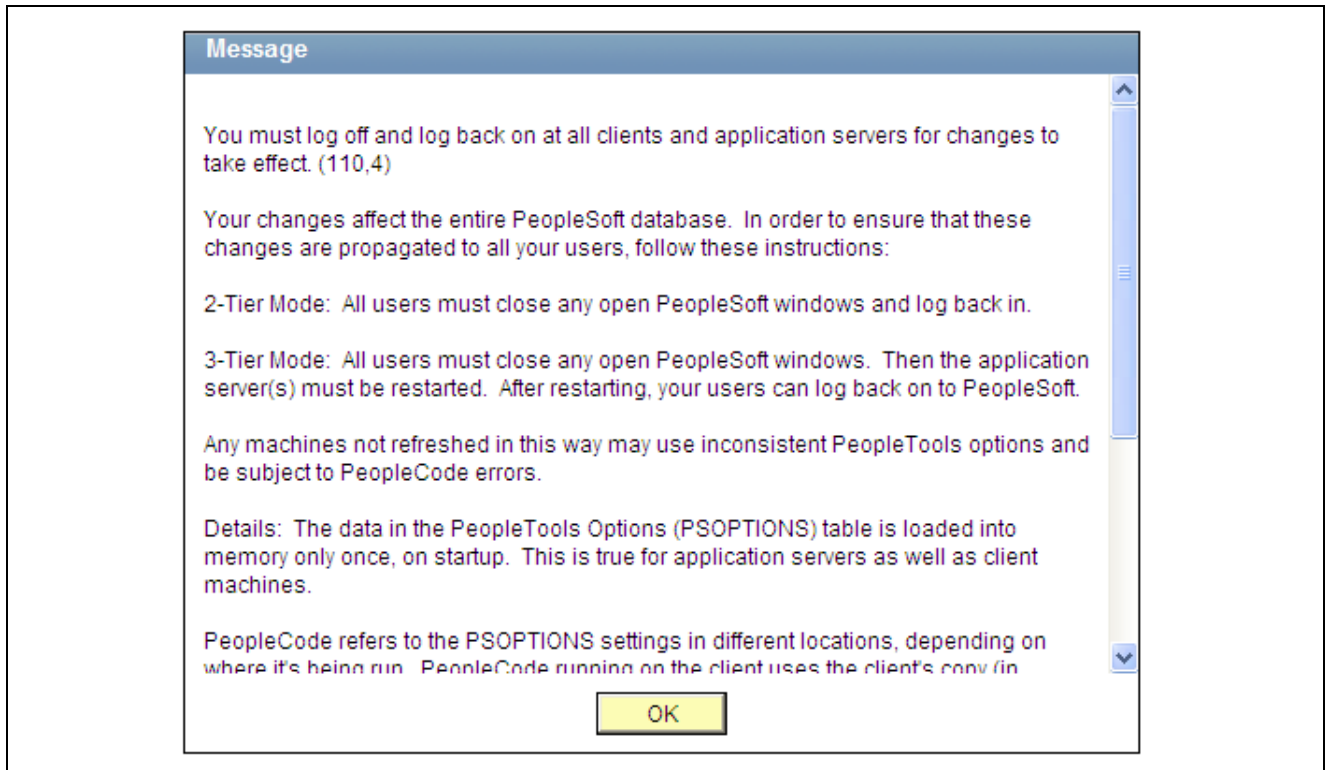
Informational message

Task 1-3: Installing PeopleSoft HCM for Military Customers

PeopleSoft Human Resources for Military customers should ensure that the Military flag setting is enabled on the Installation Table in order to have access to specific Military Rank processing functionality.

Select Set Up HRMS, Install, Installation Table and verify that the Military check box is selected.

If it was necessary to make any changes to the Installation Table, you will receive the informational message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.

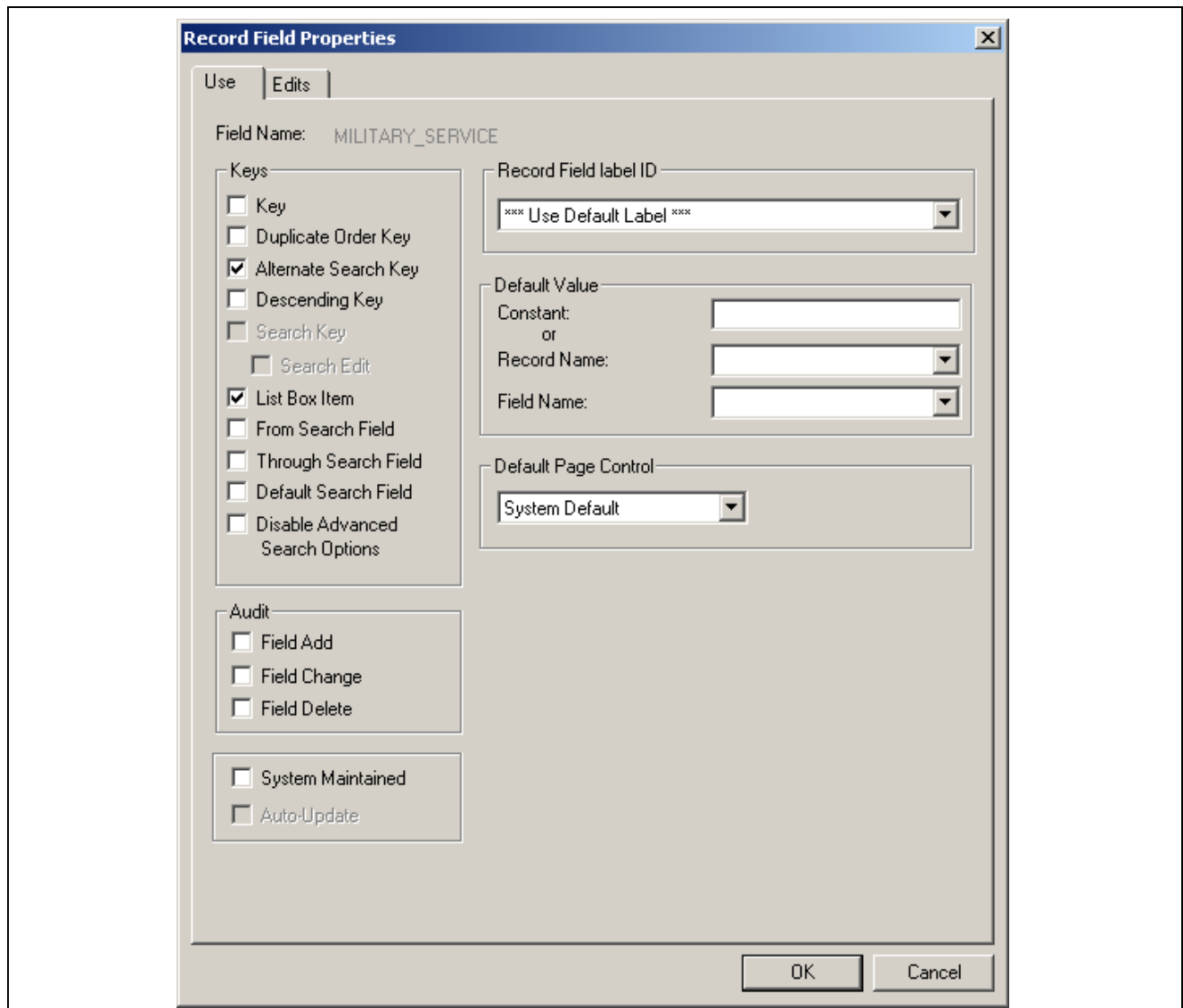


Informational message

To ensure that the Military Specific fields show in the Search Dialogs, perform the following steps:

1. Open up Record MIL_SRCH_SBR in PeopleSoft Application Designer.
2. Edit the Record Field Properties for all of the fields in the Record by selecting the Alternate Search Key flag under the Keys grouping.

The List Box Item flag is automatically selected.



Record Field Properties dialog box

3. Save the record.

Task 1-4: Installing PeopleSoft HCM for Japan

This section discusses:

- Using Global Search
- Configuring Phone and FAX Number Fields
- Printing Japanese Characters on SQR Reports

Task 1-4-1: Using Global Search

If you want the ability to search by Other ID in the delivered search views, perform the following steps:

1. Open the subrecord SCRTY_FLD_SBR and double-click the field OTHER_ID_JPN.
2. Select the Alternate Search check box.
3. Save the record.

Task 1-4-2: Configuring Phone and FAX Number Fields

Phone and fax number fields are custom format fields. If you enter a phone number without any hyphenation like 9256944023, the system automatically reformats the number into the proper format like “925/694-4023.” This works in the US.

In Japan, however, a ten-digit phone number may be formatted in several ways such as 03-1234-5670, 045-123-4567, 0567-21-1234, and so on. Thus, PeopleSoft’s standard custom format feature does not work for Japanese phone numbers.

To solve this issue, if you are a Japanese customer, you can modify the definition of the phone number field just as an ordinary string field so that the data is stored as you entered it without any automatic formatting. You can enter the phone numbers with parentheses or dashes as you like, such as 03(4567)1234 or 03-4567-1234.

1. In PeopleSoft Application Designer, open the following fields:
 - FAX
 - HOME_PHONE
 - PHONE
 - PHONE1
 - PHONE2
 - POSITION_PHONE
 - PROXY_PHONE
 - PT_CTL_PHONENUMBER
 - WORK_PHONE
2. For each field, in the Field Format group box, change the Format Type drop-down list from *Custom* to *Uppercase*.
3. Save the field.

Task 1-4-3: Printing Japanese Characters on SQR Reports

To print Japanese characters on SQR reports, the following changes need to be made.

In setenv.sqc, uncomment this line:

```
Print Specific Language -#define PRINT_JAPANESE
```

Additional changes to configuration files may also be needed depending on the settings on your operating system. For more information, see the section *PeopleSoft SQR Globalization* in the Global Technology PeopleBook.

See PeopleSoft PeopleTools: Global Technology, “Using Global Reporting and Data Analysis Tools” PeopleBook for your database platform and for your current PeopleTools release.

Task 1-5: Installing PeopleSoft HCM for Switzerland

This section describes how to install Swiss address validation.

To import Swiss address data:

1. Sign on with PeopleSoft Data Mover to the 9.0 application database.
2. Open the PeopleSoft Data Mover script <PS_HOME>\scripts\CHE_ADDR.DMS.

Note. If you are using a Unicode database, use the CHE_ADDR_DBCS.DMS file instead of the CHE_ADDR.DMS file. This imports the Swiss address data in a form that can be used with the double-byte character set.

3. Run this script against the 9.0 application database.
4. Close PeopleSoft Data Mover.

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

Task 1-6: Installing PeopleSoft Time and Labor

This section discusses:

- Creating Time Zone Offsets

This section discusses the installation of PeopleSoft Time and Labor and the creation of time zone offsets.

Task 1-6-1: Creating Time Zone Offsets

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

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

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

To select the Base Time Zone and create time zone offsets:

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

The Time Zone Data page and Daylight Savings page display the default time zone settings delivered with PeopleTools. You can change the settings on these pages if you need to customize the information for your organization.

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

Task 1-7: Installing PeopleSoft Absence Management and PeopleSoft Global Payroll Core

This section discusses:

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

Task 1-7-1: Verifying Installation Settings for PeopleSoft Absence Management

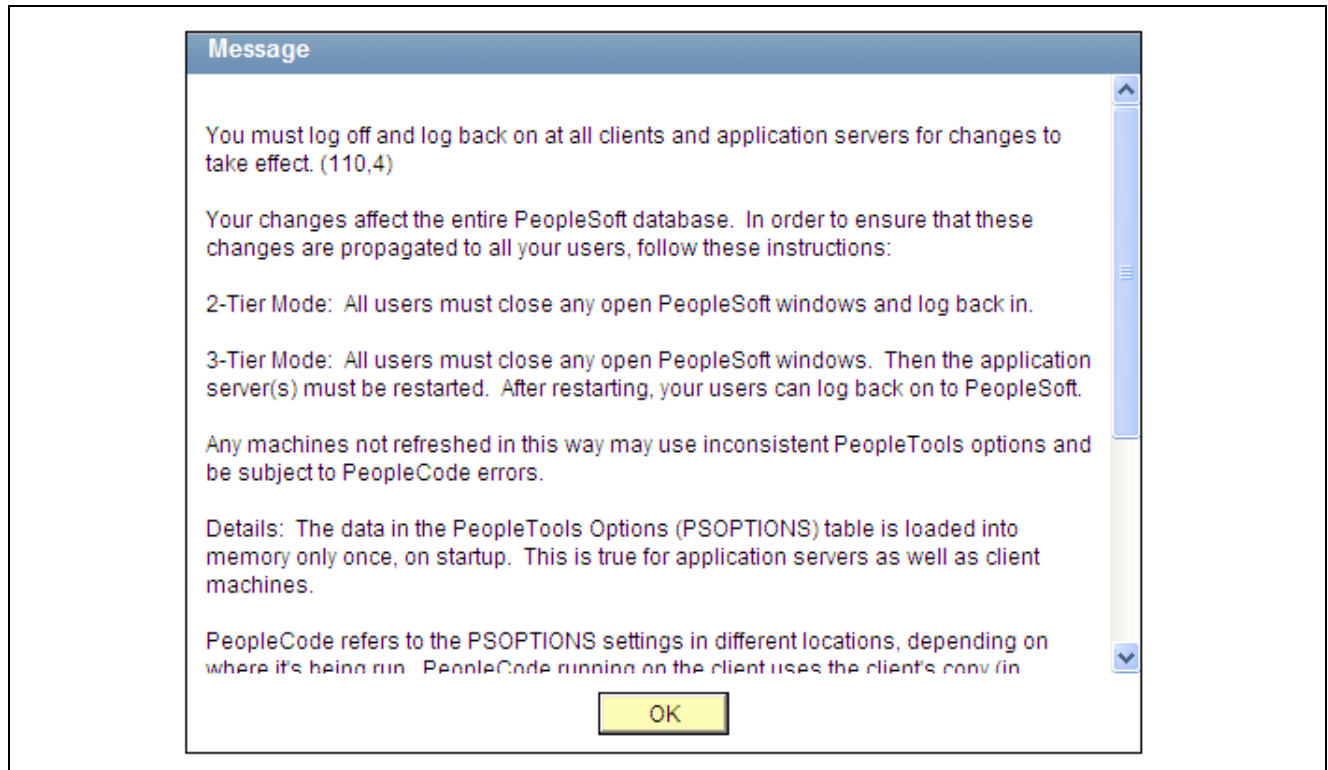
PeopleSoft Absence Management customers who are licensed for PeopleSoft Payroll for North America or PeopleSoft Payroll Interface should ensure that Global Payroll Core is disabled on the Installation Table in order to have access to specific PeopleSoft Absence Management functionality.

PeopleSoft Absence Management customers licensed for PeopleSoft Global Payroll Core, a Country Extension, or who are planning on using PeopleSoft Absence Management as a stand alone product, need to ensure that Global Payroll Core is enabled on the Installation Table.

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

- Select Set Up HRMS, Install, Installation Table and verify that the Global Payroll Core check box is *not* selected if you are using PeopleSoft Payroll for North America or PeopleSoft Payroll Interface.
- Select Set Up HRMS, Install, Installation Table and verify that the Global Payroll Core check box is selected if you are using PeopleSoft Global Payroll Core, a Country Extension or you are planning on using PeopleSoft Absence Management as a stand-alone product.

If any change is needed in the Installation Table, you will receive the informational message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.



Informational message

Task 1-7-2: Updating Process and Job Definitions for PeopleSoft Packager

This section discusses:

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

Understanding Updates for PeopleSoft Packager

This step must be done by customers who have licensed either PeopleSoft Absence Management or PeopleSoft Global Payroll Core.

The SQR GP00PK01 and the two PeopleSoft Data Mover processes (GP_EXP, GP_IMP) have to be run on an NT Process Scheduler. With Release 9.0, Job definitions that combine multiple Packager processes have been delivered in order to streamline the overall process. As a result, the Job definitions that contain either the SQR Report or the PeopleSoft Data Mover processes have to be scheduled to be run on an NT Process Scheduler.

Updating Process Definitions for PeopleSoft Packager

The following Process definitions need to be run on an NT Process Scheduler:

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

To update the previously listed Process Definitions:

1. Access the Processes component by selecting PeopleTools, Process Scheduler, Processes.
2. Click the Advanced Search link on the Search page.
3. Open the component for each of the process types and process names in the previously provided list.
4. Select the Process Definition Options tab.
5. Select the value of the NT Process Scheduler set up at your installation in the Server Name field.

Updating Job Definitions for PeopleSoft Packager

The following job definitions need to run on an NT Process Scheduler:

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

To update the previously listed Job Definitions:

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

The Server Name field contains the value *PSNT*.

4. Select the value of the NT Process Scheduler set up at your installation in the 'Server Name field.

Task 1-8: Installing PeopleSoft HCM Portal Pack

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

In order to add, remove, or change the layout of the homepage, the homepage personalization security access must be granted to all non-guest users.

To add the Portal User Role to the user IDs:

1. With PeopleSoft Data Mover sign in to the 9.0 application database.
2. Open the PeopleSoft Data Mover script <PS_HOME>\scripts\portal_add_role.dms.
3. Run this script against the 9.0 application database.
4. Close PeopleSoft Data Mover.

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

Task 1-9: Installing PeopleSoft Talent Acquisition Manager

This section describes the installation steps for the Resume Processing feature in PeopleSoft Talent Acquisition Manager.

To install Resume Processing functionality:

Note. Verify prerequisites for Resume Processing. Resume Processing (RP) 9.0 requires a working PeopleSoft HRCS 9.0 Database, Application Server, Process Scheduler, and PeopleSoft Pure Internet Architecture (PIA) Web Server. Detailed instructions for installing these components can be found in the appropriate PeopleTools installation guide for your database platform.

See PeopleSoft PeopleTools Installation guide for your database platform and for your current PeopleTools release, available on My Oracle Support.

1. Configure the Local Gateway.
 - a. Select PeopleTools, Integration Broker, Configuration, Gateways.
 - b. Click the Search button and select the Default Local Gateway.
 - c. In the URL field enter the following:
`http://<PIA_Webserver>:<Port Number>/PSIGW/PeopleSoftListeningConnector`
<PIA_Webserver> refers to the machine name of the web server hosting the gateway. This is usually the same machine that is used to run PeopleSoft PIA (for example, `http://psftweb01.peoplesoft.com:8080/PSIGW/PeopleSoftListeningConnector`). The gateway uses the PeopleSoft listening connector to receive messages from an integration engine node or a remote gateway.
 - d. Click the Load Gateway Connectors button.
An informational message appears.
 - e. Click OK.
 - f. Click Save.
2. Synchronize counters with your data.
 - a. Select Set Up HRMS, Install, Product and Country Specific, Recruiting Installation and then select the Last Assigned Ids tab.
 - b. Click the Fix Counters button near the bottom of the page.
 - c. Click the Save button.

Task 1-10: Installing PeopleSoft Global Payroll Country Extensions

This section discusses:

- Understanding the PeopleSoft Global Payroll Country Extensions Installation
- Updating Installation Indicators
- Running the GPCE SYS.DMS Script to Update Stored Installation Indicators
- Running the GPCERATE_EXP.DMS / GPCERATE_IMP.DMS Scripts to Copy HR Rate Codes

Understanding the PeopleSoft Global Payroll Country Extensions Installation

This section describes the additional installation steps required to install PeopleSoft Global Payroll Country Extensions.

Note. You only need to complete this section if you are installing one or more PeopleSoft Global Payroll Country Extensions.

The following abbreviations and terms are used in this section:

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

The objects, rules, and data for the PeopleSoft Global Payroll Country Extensions are delivered as part of the HRSYS and HRDMO databases. These additional steps walk you through additional installation actions that are required for PeopleSoft Country Extensions.

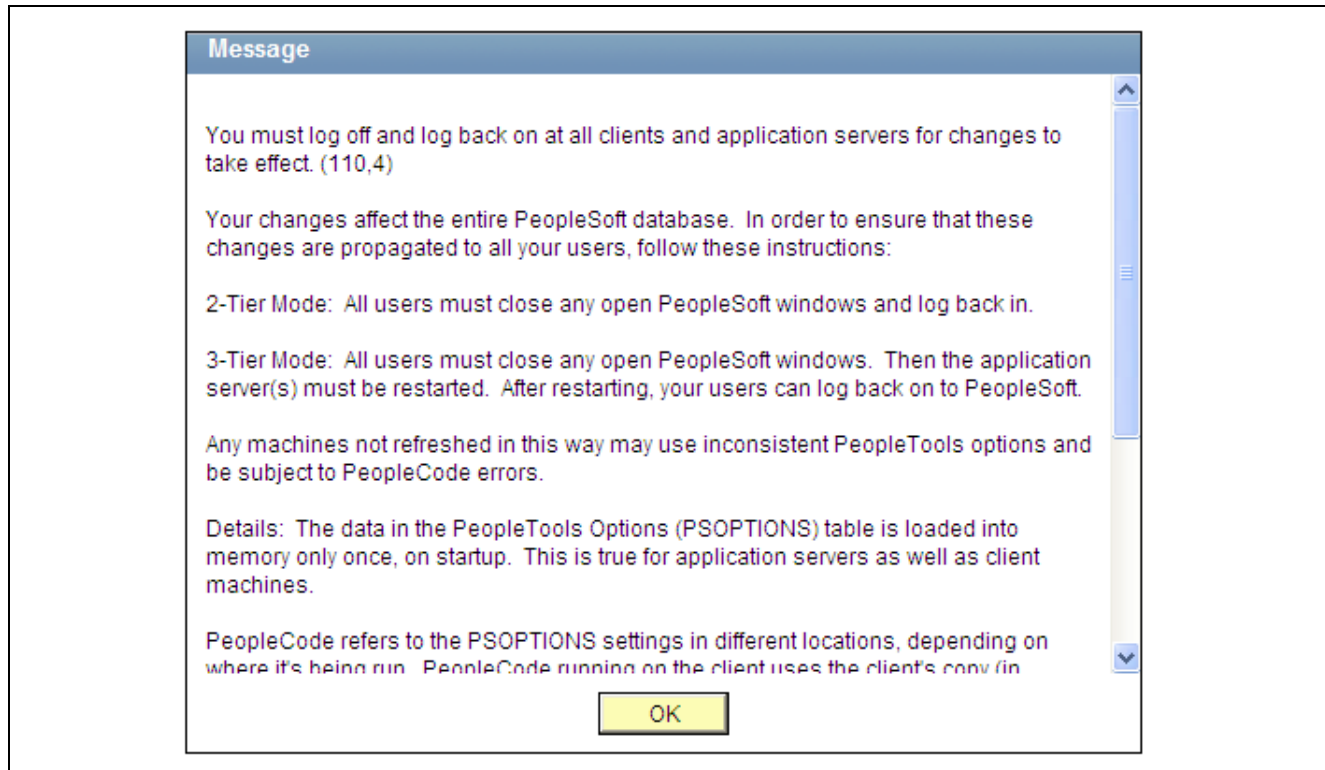
Task 1-10-1: Updating Installation Indicators

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

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

Note. This is important as these indicators are used later in this task to identify if additional updates should be made (as they are conditional based on which PeopleSoft Country Extensions you licensed).

4. If it was necessary to make any changes to the Installation Table, you will receive the informational message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.



Informational message

Task 1-10-2: Running the GPCESYS.DMS Script to Update Stored Installation Indicators

The gpcesys.dms script updates the store indicators for some elements and activates applicable trigger definitions based on the Country Extensions that you licensed. This script should be run by all PeopleSoft Global Payroll customers as the updates are conditional based on the Installation Indicators, as mentioned in the previous section.

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

Task 1-10-3: Running the GPCERATE_EXP.DMS / GPCERATE_IMP.DMS Scripts to Copy HR Rate Codes

GP Rate Code Elements for Country Extensions are delivered in both the HRSYS and HRDMO databases; however, the HR Rate Codes that are referenced by these elements are only delivered in the HRDMO database. If you would like to copy the related HR Rate Code elements directly into your HRSYS database for the GP Country Extensions that you licensed, you can use the gpcerate_exp.dms and gpcerate_imp.dms scripts to do this. These scripts have conditional export/import logic that is based on the Installation Indicators (as previously noted) to only copy the referenced HR Rate Codes that are required for the GP Country Extensions that you licensed.

After you install *both* the HRSYS and HRDMO databases, use PeopleSoft Data Mover to run the gpcerate_exp.dms script (which can be found in your <PS_HOME>\scripts directory) against your HRDMO database. You then use PeopleSoft Data Mover in bootstrap mode to run the gpcerate_imp.dms script (which can be found in your <PS_HOME>\scripts directory) against your HRSYS database (using the dat file that was just generated).

Note. DB2 z/OS customers: Follow the instructions in the script `gpcerate_imp.dms` to alter it to work properly in your environment

Note. If you only want to copy HR Rate Codes for a subset of the Country Extensions that you licensed, you should modify the `gpcerate_exp.dms` script before you run and comment out the export logic for the licensed Country Extensions that you do not want to copy (by default, only those for your licensed Country Extensions are exported, based on your Installation Indicators).

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

This section discusses:

- Understanding the PeopleSoft ePay Payslips Installation
- Installing the PeopleSoft ePay Payslips Functionality
- Installing Process Schedulers on MVS Platforms
- Modifying the JVM Configuration to Increase Heap Size

Understanding the PeopleSoft ePay Payslips Installation

This section describes the installation steps for PeopleSoft ePay Payslips (for PeopleSoft Global Payroll).

Note. The PeopleSoft Payslips process may throw a `java.lang.OutOfMemoryError` exception when the number of payees in a single payslip print run gets above 4,000. If this occurs, the amount of memory allocated to java can be increased.

See [Modifying JVM Configuration to Increase Heap Size](#).

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

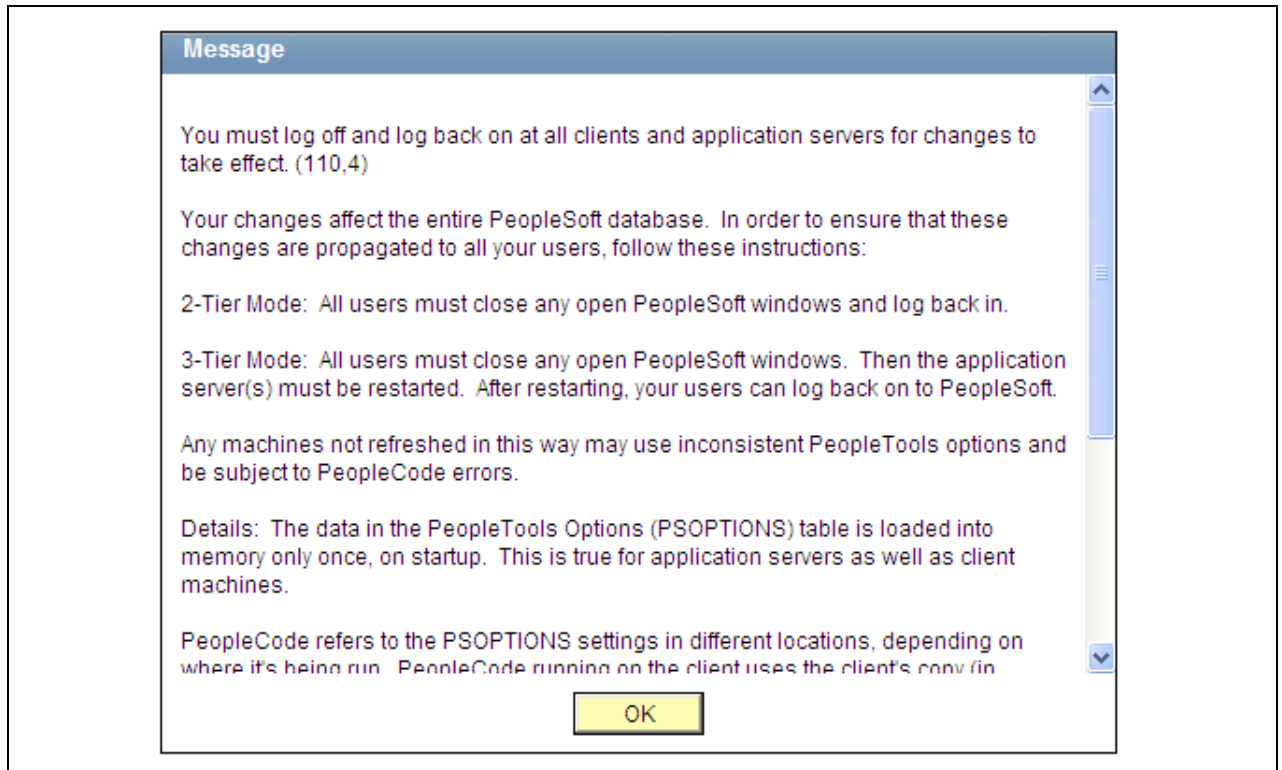
To install PeopleSoft ePay Payslips for PeopleSoft Global Payroll:

Note. PeopleSoft ePay Payslips for PeopleSoft Global Payroll has a dependence on a working FTP server. In the following example, the user ID and password used for logging onto the FTP session is `PSLPUSER/PSLPUSER`.

1. To confirm the jar installation, verify that the following two jar files are installed in your `<PS_HOME>\class` directory:
 - `Itxt-1.02b.jar`
 - `com.peoplesoft.hmcr.exceptions.jar`
2. Update URL IDs in the PeopleSoft software to point to the FTP site.

The URL ID is pointing to a virtual directory on the ftp site. You may create this virtual directory “PAYSLIPS” in the ftp root, however the PeopleSoft ePay process creates this folder if it did not exist previously. You may choose to create a directory by any name or structure (you are not limited to using “PAYSLIPS”). If you create a different directory, you must ensure that you reference this directory in the URL ID.

- a. Select PeopleTools, Utilities, Administration, URLs.
 - b. Select the following URL Identifier:
GP_SS_PSLP_FTP
 - c. Update this URL with your ftp payslip URL; for example:
ftp://PSLPUSER:PSLPUSER@COMPUTERNAME/PAYSLIPS/
3. Check the URL setting in Self Service Payslip Options.
- a. Select Set Up HRMS, Product Related, ePay, Self Service Payslip Options.
 - b. Search for the Global Payroll Country that you are installing PeopleSoft ePay Payslips for and ensure that the URL setting is the URL Identifier from the prior step.
-
- Important!** You may create your own URL ID and update this URL instead of using GP_SS_PSLP_FTP. If you create your own URL ID you must update the Self Service Payslip Options to point to your new URL ID. See *PeopleSoft ePay 9.0 PeopleBook*, “Managing Pay Information for PeopleSoft Global Payroll” for more information regarding Payslip Options.
-
4. Check PeopleSoft Installation Table Settings.
- a. Select Set Up HRMS, Install, Installation Table.
 - b. Select the ePay check box on the main Installation Table tab (Products).
 - c. If it was necessary to make any changes to the Installation Table, you will receive the informational message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.



Informational message

Task 1-11-2: Installing Process Schedulers on MVS Platforms

This section includes additional installation instructions for Process Schedulers on MVS platforms.

1. Execute this SQL statement:

```
SELECT COUNT(*) FROM PS_GP_SS_PSLP_INST
```

2. If the return value is 1 then run this SQL statement:

```
UPDATE PS_GP_SS_PSLP_INST SET GP_PSLP_XFERMETHOD = '0002'
```

3. If the return value is 0 then run this SQL statement:

```
INSERT INTO PS_GP_SS_PSLP_INST VALUES ('0002')
```

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

When running the payslip report process, the ePay Application Engine process caches the entire payslip report into memory. If Java is not allocated enough memory, the process abends with error: `java.lang.OutOfMemoryError`. To increase the memory for Java edit the `psprcs.cfg` file of each process scheduler server intended to be used for payslip report generation.

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

Example of the modified JVM configuration:

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

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

Task 1-12: Installing PeopleSoft HR Spain and PeopleSoft Global Payroll Germany/Switzerland PDF Form Files

This section describes how to load the PDF Form Files used in the PeopleSoft HR Spain and PeopleSoft Global Payroll Germany and Switzerland products. You only need to complete this task if you have licensed those products.

Before beginning this procedure, copy the files *.pdf from the PeopleSoft SQR directory to your local hard drive

1. Select the appropriate command for the products that you installed:
 - For PeopleSoft Global Payroll Switzerland, select Set Up HRMS, Product Related, Global Payroll and Absence Mgmt, Reports, Form Definition CHE.
 - For PeopleSoft Global Payroll Germany, select Set Up HRMS, Product Related, Global Payroll and Absence Mgmt, Reports, PDF Form Setup DEU, and then click the Correct History button.
 - For PeopleSoft HCM Spain, select Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, PDF Form Definition, and then click the Correct History button.
2. Use the following tables to select the Form IDs for your product.
 - Here are the Form IDs, effective dates, and filenames for Global Payroll Switzerland:

Form ID	Effdt	Filename
LAW-P1	1/1/2004	Form._11-2005-dfi.pdf
LAW-P1B	1/1/2004	Form._11-2005-dfi-b.pdf
LAW-P2	1/1/2004	Form._11-2005-dfi_x.pdf
LAW-C1	1/1/2004	Beteiligungen.pdf

- Here are the Form IDs, effective dates, and filenames for Global Payroll Germany:

Form ID	Effdt	Filename
CT_ARBS	9/01/2007	ARBS032006.pdf
CT_ERGE	1/1/2006	ERGE012006.pdf
CT_KRGE	1/1/2006	KRGE012006.pdf
CT_MUGE	1/1/2006	MUGE112005.pdf
CT_WOGE	1/1/2006	WOGE112005.pdf

- Here are the Form IDs, effective dates, and filenames for HR Spain:

Form ID	Effdt	Filename
PE-170	1/1/1900	PE-170.pdf
PE-170	1/1/1980	PE-170_mod.pdf

- For each Form ID, click the Delete button; the Add button appears.

This example shows the Form Definition page for Form ID LAW-P1.

Form Definition

Form ID: LAW-P1

Form Data Find | View All First 1 of 1 Last

*Effective Date: 01/01/2004

End Date:

*Description: LAW Statement - Part 1

Comment:

Form Details Customize | Find | View All First 1 of 1 Last

	*Language Code	Default Language	Attached File	View	Delete	Details
1	German	<input checked="" type="checkbox"/>	Form_11-2005-dfl.pdf	View	Delete	Details

Form Definition page

- Click Save.
- Click Add.
- Select Form File, select and click Upload.
- Click View to verify that the form is correctly loaded.

Task 1-13: Installing PeopleSoft Directory Interface

This section discusses:

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

Prerequisites

PeopleSoft Directory Interface has dependency on the additional component (third-party) LDAP-enabled directory server. If you have not installed a supported LDAP-enabled directory server already, install it using the installation instructions provided by the vendor. Make sure that PeopleSoft supports the directory server that you install.

If you already have an LDAP-enabled directory server installed, make sure that PeopleSoft supports your directory server vendor and that the directory server is on a supported version.

Note. Novell NDS is no longer bundled with PeopleSoft. For the most current information on the supported directory servers, refer to the PeopleTools Hardware and Software Requirements Guide and the PeopleSoft Platforms site on My Oracle Support.

Task 1-13-1: Verifying the Installation Options for PeopleSoft Directory Interface

PeopleSoft Directory Interface customers should ensure that the Directory Interface setting is enabled on the Installation Table in order to have access to PeopleSoft Directory Interface functionality.

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

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

Before proceeding with the installation, back up all servers and databases that you have set up for the installation. So that you can recover to this point if necessary, do the following:

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

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

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

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

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

1. Launch PeopleSoft Data Mover on the Install Workstation.

2. Select File, Open.
3. Navigate to the \scripts directory on the drive containing the Directory Interface codeline installation.
For example, <PS_HOME>\scripts.
4. Open and select File, Run Script to run the following PeopleSoft Data Mover scripts for PeopleSoft HRMS:

```
disehr.dms  
dimaphr.dms
```

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

Task 1-14: Installing PeopleSoft Payroll Interface for ADP Connection

This section discusses:

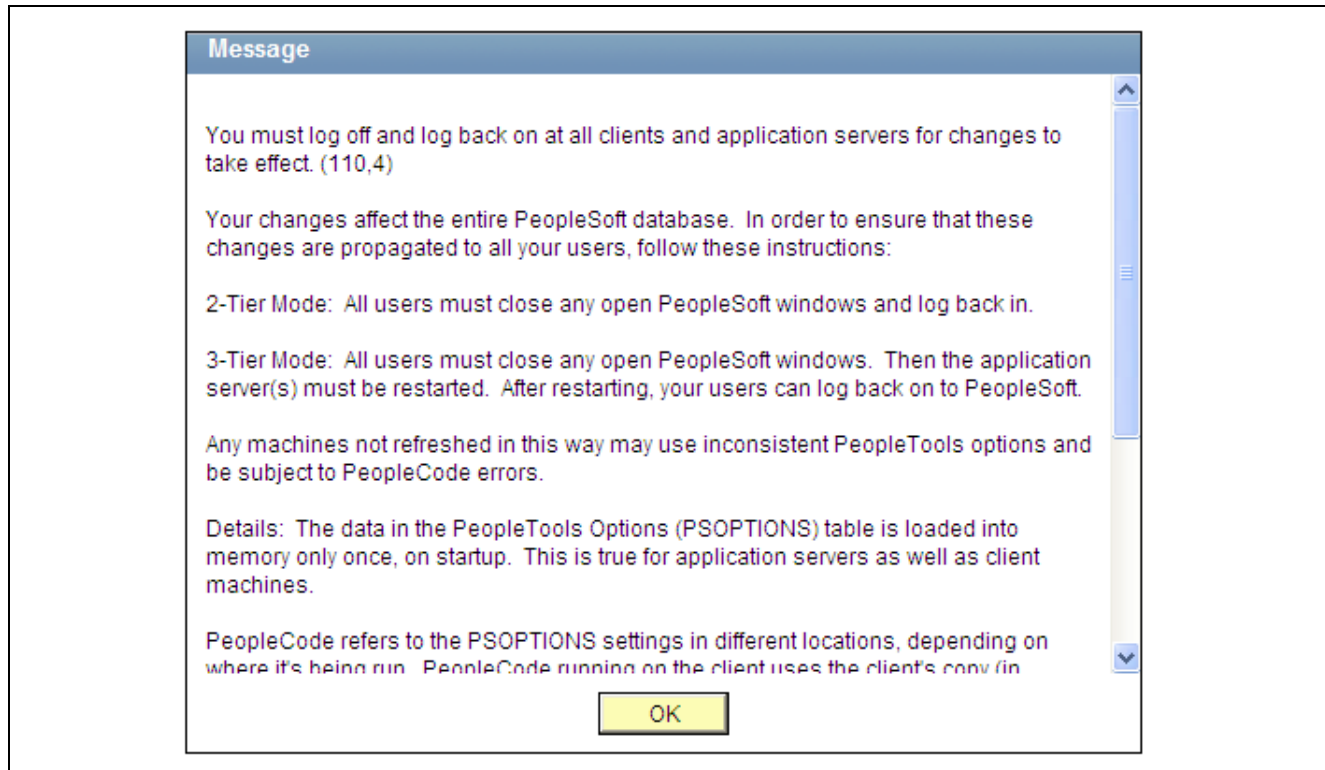
- Verifying the Installation Options for PeopleSoft Payroll Interface for ADP Connection
- Running the PeopleSoft Payroll ADP Connection Installation Script

Task 1-14-1: Verifying the Installation Options for PeopleSoft Payroll Interface for ADP Connection

This section describes the installation steps for PeopleSoft Payroll Interface for ADP Connection.

Select Set Up HRMS, Install, Installation Table and verify that the Payroll Interface for ADP check box is selected.

If it was necessary to make any changes to the Installation Table, you will receive the informational message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.



Informational message

Task 1-14-2: Running the PeopleSoft Payroll ADP Connection Installation Script

To install PeopleSoft Payroll Interface for ADP Connection in a PeopleSoft HRMS Database, run the PeopleSoft Payroll Interface for ADP Connection installation script.

Using PeopleSoft Data Mover in bootstrap mode, run the hcpiadpi.dms script, found at <PS_HOME>\scripts, with the hcpiadpe.dat file to import the PeopleSoft Payroll Interface for ADP Connection setup data.

Note. For DB2 z/OS users: Update the hcpiadpi.dms script before running to set the current sqldid.

Task 1-15: Installing PeopleSoft Pay/Bill Management

In this section, you activate Service Operations that are required to integrate with the PeopleSoft FSCM 9.0 database. Remember that the PeopleSoft Pay/Bill Management product is only supported on the following database platforms:

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

Note. *For customers on the Oracle platform only:* Please run the following statement against the PeopleSoft HRMS 9.0 database using SQL*PLUS before running the following script: `ALTER SESSION set NLS_Date_Format = 'YYYY-MM-DD'`

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

```
activate_all_hcm.sql
```

The script reads a project that is contained in your PeopleSoft HRMS 9.0 database named FO_MESSAGES and based on this, the script activates Service Operations, Routings and Handlers, starts queues, and creates or activates Full Data Publish Rules.

Task 1-16: Installing Service Handlers

Some products have service handlers that need to be activated for the proper working of the database.

See *PeopleSoft PeopleTools: Integration Broker PeopleBook*, for your current *PeopleTools* release.

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

1. Logon to Portal, and select PeopleTools, Integration Broker, Integration Setup, Services.
2. For each of the products listed in the following table that have Service Handlers that need to be activated, get a list of the messages, and enter each message name in the Service Name Field and Search.

Product	Has Service Handlers that need to be activated
Absence Management	No
Benefits Administration	No
Campus Community	Optional
Candidate Gateway	Optional
Directory Interface	Yes
Ebenefits	No
eCompensation	Yes
eCompensation Manager Desktop	Yes
eDevelopment	No
ePay	No
ePerformance	Optional
eProfile	No
Enrollment Services	Optional
Global Payroll — Australia	No
Global Payroll — Brazil (listed as HR Core)	Yes
Global Payroll — Core	Yes
Global Payroll — France	No
Global Payroll — Germany	No
Global Payroll — Hong Kong	No
Global Payroll — India	No
Global Payroll — Italy	No

Product	Has Service Handlers that need to be activated
Global Payroll — Japan (listed as Benefits Administration)	Yes
Global Payroll — Malaysia	No
Global Payroll — Mexico (listed as HR Core)	Yes
Global Payroll — Netherlands	No
Global Payroll — New Zealand	No
Global Payroll — Singapore	No
Global Payroll — Spain	No
Global Payroll — Switzerland	Optional
Gloabal Payroll — Thailand	No
Global Payroll — UK	No
Global Payroll — United States	No
HCM for the U.S. Federal Government	No
HCM for Education and Government	Yes
Human Resources	Yes
Payroll for North America	Yes
Payroll Interface	No
Pension Administration	No
Stock Administration	Optional
Student Financial Services	Optional
Talent Acquisition Manager	Optional
Time and Labor	Optional
Workforce Compensation Solutions	No

- On the Service details page, select the Service Operation link in the “Existing Operations” grid.
The Service Operation details page appears.
- Select the Handlers tab, and ensure the status is Active for the Handlers.

Task 1-17: Installing Configurable Matrices and Metadata

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

Configurable Matrices are dependent on metadata definitions that in turn are dependent on the proper installation of java classes. Confirm that the following two jar files are installed in the <PSHOME>\class directory:

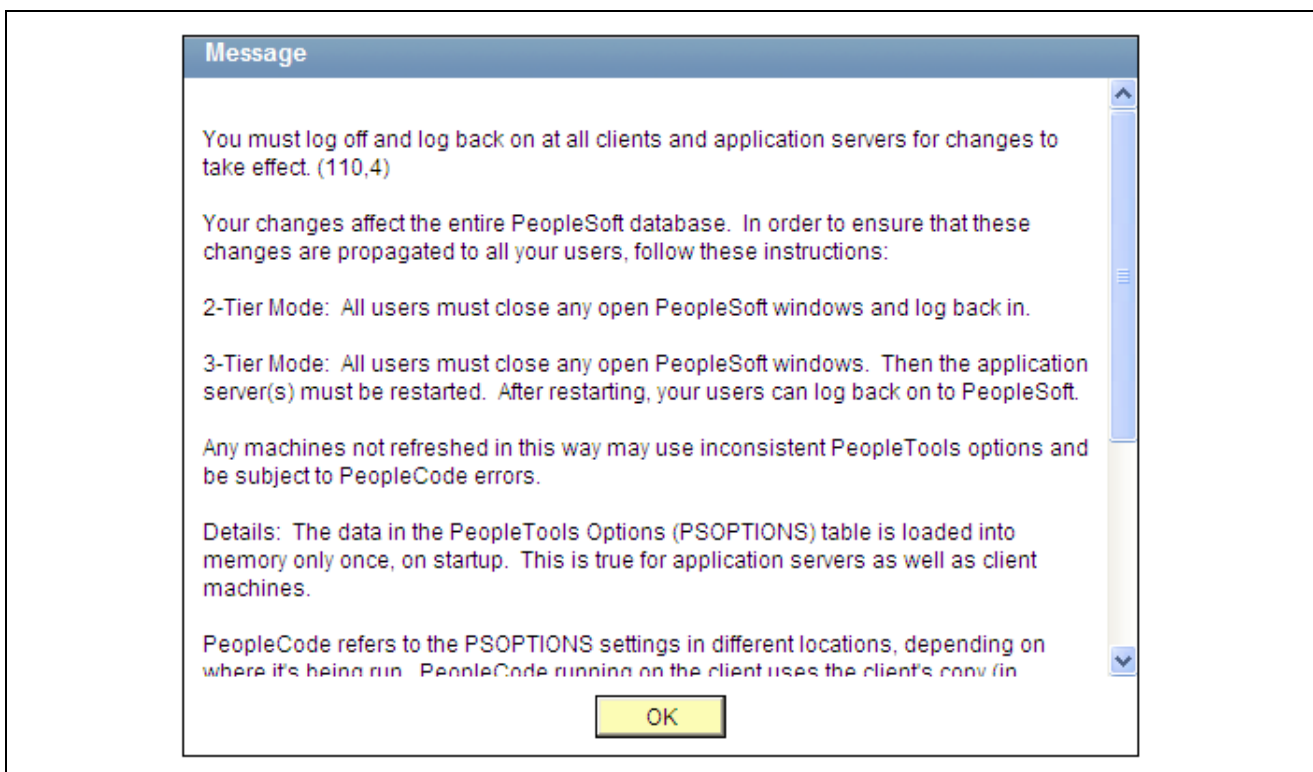
- jdom.jar
- com.peoplesoft.hmcr.exceptions.jar

If there is a <PSHOME>\class\OS390 directory, these two files should be there as well.

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

PeopleSoft Human Resources for French Public Sector customers should ensure that French Public Sector setting is enabled on the Installation Table in order to have access to specific PeopleSoft French Public Sector functionality.

1. Select Set Up HRMS, Install, Installation Table, Products, and verify that the Human Resources and French Public Sector check-boxes are selected.
If they are not already selected, select them.
2. Go to the Country Specific page, select the Installed HR Countries link and verify that France is selected.
If it is not selected, select it.
3. If it was necessary to make any changes to the Installation Table, you will receive the message that follows. You then need to log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HRMS for this change to take effect.



Informational message

4. Select Set Up HRMS, Install, Product and Country Specific, FPS Installation Parameters.
5. Select the FPS Installation Parameters 2 page and then click the Activate FPS Actions button if you are willing to use the existing action codes.

CHAPTER 2

Installing PeopleSoft Campus Solutions 9.0 Applications

This chapter discusses:

- Setting Up Equation Engine Security
- Transferring and Compiling Additional Component COBOL for PeopleSoft Student Administration
- Installing Database Audit Triggers for PeopleSoft Student Records
- Adjusting PeopleTools EDI Manager for Financial Aid Processes
- Using CPU Space for PeopleSoft Academic Advising
- Running the SFA_ECQUEUE_TABLES_RESET Script
- Configuring Your PeopleBooks Documentation Website
- Using the User Profiles Management Result Table
- Installing PeopleSoft Student Administration Integration Pack
- Installing PeopleSoft Contributor Relations

Task 2-1: Setting Up Equation Engine Security

Oracle delivers Equation Security with all public access to all equation objects activated within the authorized equation components. Your institution may not want to provide this level of access to all of your equation users. For example, you may want to limit who can read certain tables and views and who can execute certain equation sql objects. Refer to the sections on equation security in the Equation Engine Programmers Guide for details on how to limit security access. The *Equation Engine Programmers Guide* can be found at the end of the *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*.

Task 2-2: Transferring and Compiling Additional Component COBOL for PeopleSoft Student Administration

This section discusses:

- Using Additional Component COBOL for PeopleSoft Student Administration
- Compiling Additional Component COBOL on Microsoft Windows NT/2000
- Compiling Additional Component COBOL on UNIX

Task 2-2-1: Using Additional Component COBOL for PeopleSoft Student Administration

PeopleSoft Student Administration is delivered with additional component COBOL sources referred to as INAS (Institutional Needs Analysis System) that do not compile correctly using the standard PeopleSoft method described in the PeopleTools installation guide. The following sections describe how to compile the INAS COBOLs for all operating system platforms.

INAS COBOL sources, which are licensed from the College Board, have a naming standard based upon the academic year to which they apply. The following table lists the names of the INAS COBOL files where “yy” refers to the academic year (for example, FED05.CBL, FED06.CBL, and FED07.CBL).

The values of “yy” for recent Academic Aid years are as follows:

- 2010–2011: yy = 10
- 2011–2012: yy = 11
- 2012–2013: yy = 12

Copy Books	Programs
FEDyy.CBL (yy = 11 or less)	FMCALCyy.CBL
FEDEXTyy.CBL (yy = 11 or less)	FMRJCTyy.CBL
FEDORIyy.CBL (yy = 11 or less)	FMSNTyy.CBL
FEDWRKyy.CBL	FMTWEKyy.CBL
FMCNSTyy.CBL	IMCALCyy.CBL
FUNCWAny.CBL	IMMAPIyy.CBL
GLOBALyy.CBL	IMMAPOyy.CBL
IMCNSTyy.CBL	IMMSGEyy.CBL
INARyy.CBL	IMPLUSyy.CBL
PLUSWAny.CBL	IMTWEKyy.CBL
PROyy.CBL (yy = 08 or 09)	INAS20yy.CBL
PROEXTyy.CBL (yy = 08 or 09)	INCOMPyy.CBL
PROWRKyy.CBL	INFUNCyy.CBL
TAXPRMy.CBL	ININARyy.CBL
IWKGLBy.CBL	INLCLyy.CBL
IMRyy.CBL (yy = 10 or greater)	INMIGRyy.CBL
IMREXTyy.CBL (yy = 10 or greater)	INTAXyy.CBL

Copy Books	Programs
FMRyy.CBL (yy = 12 or greater)	NA
FMREXTyy.CBL (yy = 12 or greater)	NA

In a Unicode environment the six COBOLs in the following list fail to compile during the “Compiling COBOL” section of the PeopleTools installation guide. The errors occur because required COBOL sources are not copied to the temporary compile directory by cblbld.bat or pscbl.mak while the build runs.

- FAPINAS9
- FAPINAS0
- FAPINAS1
- FAPINAS2
- FAPINAS3
- IMPLUS08
- IMPLUS09
- IMPLUS10
- IMPLUS11
- IMPLUS12

See PeopleSoft PeopleTools Installation guide for your database platform and for your current PeopleTools release, available on My Oracle Support.

On UNIX, the errors can be ignored because pscbl.mak copies all of the COBOLs that successfully compile to PS_HOME/cblbin directory. Also, the errors should go away after compiling additional component COBOL on UNIX is completed so subsequent recompiles should be clean. Task 2-2-3 describes how to successfully compile the remaining files so that all sources are built.

On Microsoft Windows, cblbld.bat stops after the six errors occur and does not copy the compiled COBOL files to the PS_HOME\CBLBINU directory. Because of this, the compiled *.exe's, *.gnt's, and *.int's should be manually copied from the compile directory to the PS_HOME\cblbinu directory after cblbld.bat stops.

See Compiling Additional Component COBOL on Microsoft Windows NT/2000.

In an ANSI environment on Microsoft Windows, the COBOL compiling process described in the PeopleTools 8.52 Installation Guide removes all compiled COBOLs from PS_HOME\cblbina before copying the new files in. This also removes the INAS COBOLs that are created in this task. As a result, you need to repeat Task 2-2-2 after a PeopleSoft COBOL recompile using cblbld.bat so that the INAS objects are replaced.

Task 2-2-2: Compiling Additional Component COBOL on Microsoft Windows NT/2000

Using cblbld.bat, as described in the “Compiling COBOL on Microsoft Windows” chapter of the PeopleTools installation guide, only compiles sources with a “P” in the 3rd position of the file name, which is the PeopleSoft naming standard for COBOL. The INAS COBOL files do not conform to this naming standard so the following instructions should be used to compile the INAS sources.

See PeopleSoft PeopleTools Installation guide for your database platform, “Compiling COBOL on Microsoft Windows” for your current PeopleTools release, available on My Oracle Support.

To compile additional component COBOL on Microsoft Windows NT/2000:

1. Select Start, Run.

Enter cmd.exe and click OK.

2. Enter the following command:

```
SET COBROOT = <Net Express Base directory>
```

For example:

```
SET COBROOT = C:\psoft\NetExpress\Base
```

3. Enter the command:

```
SET PS_HOME = <PS_HOME>
```

For example:

```
SET PS_HOME = c:\psoft\psenv\HR90DEMO
```

4. Enter the command:

```
SET PATH=%PATH%;%PS_HOME%\src\cbl\win32
```

5. Change directory to the COBOL source directory within PS_HOME, for example:

```
CD %PS_HOME%\src\cbl\base
```

6. Execute the Third-Party INAS compile routine to compile INAS sources for all active academic aid years.

```
INASUNCV <Compile Drive> <\Compile Directory>
```

For example:

```
INASUNCV C: \TEMP\COMPILE
```

This routine should be run using the same run parameters used to run CBLBLD.BAT.

7. Change directory to the temporary COBOL compile directory from step 6.

Compile PeopleSoft Third-Party (additional component) interface programs FAPINAS9.CBL, FAPINAS0.CBL, FAPINAS1.CBL, FAPINAS2.CBL, and FAPINAS3.CBL:

```
CBLMAKE FAPINAS9
```

```
CBLMAKE FAPINAS0
```

```
CBLMAKE FAPINAS1
```

```
CBLMAKE FAPINAS2
```

```
CBLMAKE FAPINAS3
```

8. If you are in a Unicode environment, you need to manually copy all .GNT, .EXE, and .INT files from the temporary compile directory used by CBLBLD.BAT and INASUNCV.BAT into the %PS_HOME%\CBLBINU directory.

The temporary compile directory would be c:\temp\compile if cblbld.bat was run as shown in the following example:

```
cblbld.bat c: \temp\compile
```

```
C:\temp\compile>move * D:\PSOFT\PSENV\HR90DMOU\CBLBINU
```

Task 2-2-3: Compiling Additional Component COBOL on UNIX

Using pscbl.mak, as described in the “Compiling COBOL on UNIX” chapter of the PeopleTools installation guide, only compiles sources with a “P” in the 3rd position of the file name, which is the PeopleSoft naming standard for COBOL. The INAS COBOL files do not conform to this naming standard. Use the following directions to compile the INAS sources.

See PeopleSoft PeopleTools Installation guide for your database platform, “Compiling COBOL on UNIX” for your current PeopleTools release, available on My Oracle Support.

To compile additional component COBOL on UNIX:

1. Set variables using `./psconfig.sh`
2. Change directory to `$PS_HOME/setup`, and run these commands:
 - a. `./inasbl08.mak`
 - b. `./inasbl09.mak`
 - c. `./inasbl10.mak`
 - d. `./inasbl11.mak`
 - e. `./inasbl12.mak`
 - f. `./pscbl.mak`

Task 2-3: Installing Database Audit Triggers for PeopleSoft Student Records

This section discusses:

- Understanding Database Audit Triggers
- Using Audit Triggers
- Installing the Audit Triggers

Understanding Database Audit Triggers

An audit mechanism implemented using database triggers is provided for Grade changes, Degree record changes, and Security table changes. Pages and components are also being delivered to allow a user to search and review the audit records.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook

PeopleSoft Student Records 9.0 PeopleBook

Task 2-3-1: Using Audit Triggers

These triggers should be created after the data conversion is completed and the legacy data for an institution is loaded into the application tables. Otherwise, the internal load of the legacy data into the system inserts rows into the audit tables and the data load process runs slower for tables that have triggers.

Triggers are automatically dropped if the table they are defined on is dropped for any reason. If a table is dropped and then re-created, then the appropriate scripts to create the triggers for that table must be executed again.

An example of such a scenario would be as follows. Using PeopleSoft Application Designer, a field is added to one of the tables on which a trigger is defined. The build action generates an alter script which is executed using a query tool to change the table at the database level. The alter script drops the original table and recreates a new one by the same name. This causes the trigger to be dropped. You must then recreate the trigger for this table. This scenario could occur when an institution makes a modification at their site or applies a fix provided by Oracle that alters such a table. In the case of a fix, the instructions for the fix create a note about recreating the trigger.

These tables and the associated triggers are listed in the next section.

Task 2-3-2: Installing the Audit Triggers

Based on your database platform, find the appropriate trigger files under the Scripts folder and create triggers as listed in the table that follows. These are SQL files and should be run against your database using your query tool of choice. These trigger files have been tested on these databases using the release level specified by Oracle for PeopleSoft release 9.0 and therefore are certified for any database release level that is the same or higher. If you are running on a database release level prior to the one specified in the table, these trigger files may not be applicable. Consult with your database administrator before running these trigger files.

DB2 for Linux, UNIX, and Windows Database Platform

Table	Trigger File
ACAD_DEGR	SSR_DB2_ACAD_DEGR_TR.SQL
ACAD_DEGR_HONS	SSR_DB2_ACAD_DEGR_HONS_TR.SQL
ACAD_DEGR_PLAN	SSR_DB2_ACAD_DEGR_PLAN_TR.SQL
ACAD_DEGR_SPLN	SSR_DB2_ACAD_DEGR_SPLN_TR.SQL
ES_SECURITY_TBL	SSR_DB2_ES_SEC_TBL_TR.SQL
ES_SECURITY_DTL	SSR_DB2_ES_SEC_DTL_TR.SQL
STDNT_ENRL	SSR_DB2_GRADE_TR.SQL

Microsoft SQL Server Database Platform

Table	Trigger File
ACAD_DEGR	SSR_MSS_ACAD_DEGR_TR.SQL
ACAD_DEGR_HONS	SSR_MSS_ACAD_DEGR_HONS_TR.SQL
ACAD_DEGR_PLAN	SSR_MSS_ACAD_DEGR_PLAN_TR.SQL
ACAD_DEGR_SPLN	SSR_MSS_ACAD_DEGR_SPLN_TR.SQL
ES_SECURITY_TBL	SSR_MSS_ES_SEC_TBL_TR.SQL
ES_SECURITY_DTL	SSR_MSS_ES_SEC_DTL_TR.SQL
STDNT_ENRL	SSR_MSS_GRADE_TR.SQL

Oracle Database Platform

Table	Trigger File
ACAD_DEGR	SSR_ORA_ACAD_DEGR_TR.SQL
ACAD_DEGR_HONS	SSR_ORA_ACAD_DEGR_HONS_TR.SQL
ACAD_DEGR_PLAN	SSR_ORA_ACAD_DEGR_PLAN_TR.SQL
ACAD_DEGR_SPLN	SSR_ORA_ACAD_DEGR_SPLN_TR.SQL
ES_SECURITY_TBL	SSR_ORA_ES_SEC_TBL_TR.SQL
ES_SECURITY_DTL	SSR_ORA_ES_SEC_DTL_TR.SQL
STDNT_ENRL	SSR_ORA_GRADE_TR.SQL

Task 2-4: Adjusting PeopleTools EDI Manager for Financial Aid Processes

This section discusses:

- Updating the ECOUTMAP.SQC File
- Modifying the ECIN0001.SQR File

Task 2-4-1: Updating the ECOUTMAP.SQC File

In 8.x versions of PeopleTools, EDI Manager requires some modifications for Financial Aid business processing.

Note. This task is only necessary when using the CommonLine™ 4 features. This is not necessary to implement if your institution uses Direct Lending or Common Record CommonLine processing.

In the following procedure, you use PeopleTools EDI Manager to run a process that updates the base ECOUTMAP.SQC file with the Financial Aid EDI Outbound map definitions. Make sure that the new file replaces the original file of the same name.

To update the ECOUTMAP.SQC file with Financial Aid EDI Outbound map definitions:

1. Select PeopleTools, EDI Manager on your target database.
2. Select Monitor EDI Processing, Prepare Outbound Driver.
3. Enter a Run Control ID of *FA800*. (Add it if you don't have it).
4. Enter the directory path for ECOUTMAP.SQC file, typically <PS_HOME>\SQR.
5. Select the Transaction IDs that your institution uses by checking the appropriate "Select" box.

Important! Additional Transaction IDs may appear. *It is important that only the files processed by your Financial Aid office are selected.* Consult with your Financial Aid Office staff for the required EDI transactions.

Financial Aid EDI Outbound Map Definitions are:

Transaction ID	Map ID	Description of Files Created
CommonLine Loans	N/A	N/A
A004P	CL_ORIG_V4	CommonLine™ 4 Application Send
C004P	CL_CHNG_V4	CommonLine™ 4 Change Send

6. Click Save.
7. Click Run.
8. Select your server name, and click OK.
9. Monitor the execution of the SQR using the Process Monitor.

Task 2-4-2: Modifying the ECIN0001.SQR File

The ECIN0001.SQR is the PeopleTools EDI Manager Inbound EC Agent process. The default configuration of this file is set to only process individual files containing no more than 2500 rows of data. To allow the SQR to handle larger files, the SQR must be modified.

Note. This modification may be needed if the Financial Aid Office is importing and exporting large files using the CommonLine™ loan process. This is not needed for Common Record CommonLine (CRC) loan processing. Verify with the Financial Aid Office whether or not this modification is necessary for their business process.

To modify the ECIN0001.SQR file:

1. Open the ECIN0001.SQR file using a text editor and find this section:

```
Create-Array name= FILEDATA0 size = 1
  field=ecfilerowid:char:2500
  field=ecqueueinstance:number:2500
  field=filedata:char:2500
  field=luwlinenum:number:2500
  field=ectransid:char:2500
  field=message_set_nbr:number:2500
  field=message_nbr:number:2500
  field=error_misc:char:2500
  field=siblingcount:number:2500=-1    ! number of siblings detected for this parent row
```

Section of ECIN0001.SQR file

2. Modify the section by replacing the value 2500 with 35000.

This modification increases the maximum number of rows allowed in a file to 35,000 rows. You may increase the file row limit up to 64,000, if necessary.

```
Create-Array name= FILEDATA0 size = 1
  field=ecfilerowid:char:35000
  field=ecqueueinstance:number:35000
  field=filedata:char:35000
  field=luwlinenum:number:35000
  field=ectransid:char:35000
  field=message_set_nbr:number:35000
  field=message_nbr:number:35000
  field=error_misc:char:35000
  field=siblingcount:number:35000=-1    ! number of siblings detected for this parent row
```

Modified ECIN0001.SQR file

Task 2-5: Using CPU Space for PeopleSoft Academic Advising

The PeopleSoft Academic Advising process is very CPU intensive. Consult the *PeopleTools Performance Guidelines* white paper for more details on this issue. This white paper can be found on My Oracle Support.

Task 2-6: Running the SFA_ECQUEUE_TABLES_RESET Script

For PeopleSoft HCM and Campus Solutions, use PeopleSoft Data Mover to run this script against the PeopleSoft HCM and Campus Solutions SYS database only. You can find the `sfa_ecqueue_tables_reset.dms` script in `<PS_HOME>\scripts`. You do not need to log off all clients and shut down application servers after running this script.

Task 2-7: Configuring Your PeopleBooks Documentation Website

Be aware that the *PeopleSoft Campus Solutions 9 Application Fundamentals PeopleBook* contains sensitive system information, to include security information. You should review this PeopleBook before you make it available on your documentation website.

Task 2-8: Using the User Profiles Management Result Table

This section discusses:

- Understanding the Audience for this Information
- Using the User Profiles Management Clean Up Pages

Task 2-8-1: Understanding the Audience for this Information

This section is intended to be available only to the administrator having access to your security tables. It includes sensitive security information about user IDs and passwords that are created by the User Profiles Management process. The information is included here so that it would not be part of the PeopleBooks.

Warning! The information in this section should *not* be shared with your users.

The following sections include information on how to manipulate the user IDs and passwords that are created by the User Profiles Management background process. What is documented here is the clean up process that takes place after the User Profiles Management process is run.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Creating and Maintaining User Profiles."

Task 2-8-2: Using the User Profiles Management Clean Up Pages

This table describes the User Profiles Management process:

Usage	Use the User Profile Clean Up Processes page to delete the temporary tables associated with the USERPROFILE processes. You also use this page to delete the result table, which holds user ID and non-encrypted password information.
Object Name	MAINT_USRPROF_DATA
Page Name	User Profile Clean Up Process.
Navigation	Set Up SACR, Security, Secure Student Administration, Process, User Profiles Mgmt - Clean Up.

User Profile Clean Up Processes page

The section *Delete temp tables created by the following processes* includes the following options:

Create User Profiles	Select this check box to delete the temporary table PS_USRPRF_NWID_TMP, which is created by the Create User Profiles process when you run USERPROFILE.
Delete Role in User Profiles	Select this check box to delete the temporary table PS_USRPRF_DEL_TMP, which is created by the Delete Roles in User Profile process when you run USERPROFILE.
Assign Role	Select this check box to delete the temporary table PS_USRPRF_ASG_TMP, which is created by the Assign Role process when you run USERPROFILE.
Assign User Preferences	Select this check box to delete the temporary table PS_ASSN_SETVAL_TMP, which is created by the Assign User Preferences process when you run USERPROFILE.

Note. The clean up process does not delete information from the error log record (PS_ERR_LOG_USRPRF). Use your defined SQL tool to delete information from error log record as needed.

Reviewing the section *Delete result table (includes non-encrypted passwords)*:

The fields in the Delete Result Table section of the application page allow you to delete rows of data from the temporary result table (PS_USRPRF_LTR_COMM) that is created if you selected the Create Result Table check box on the User Profile Mass Creation page. This is the only place where the non-encrypted passwords are stored. It is your responsibility to frequently run the cleanup process.

The temporary result table includes a column called Ready To Delete (READY_TO_DEL) that is a Y (yes) or N (no) flag for each user ID. When the User Profiles Management process runs and the Create Result Table option is selected in the setup page (Setup SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation), the User Profiles Management process determines if the flag should be a Y or a N based on the Event ID you selected.

The User Profiles Management process sets the flag to N (meaning not ready to be deleted) when the Assign 3C check box is checked on the User Profile Mass Creation setup page and the Event ID specified includes a letter code set up with the Name SQC equal to CCLTRWOL. This SQC is used by the Letter Generation process to extract the user ID and the password and make the information available to add on a communication. Do not delete rows in this table if the Letter Generation process has not been run yet. After the Letter Generation process is run, the flag changes to Y to indicate that the user ID row is now ready to be deleted.

Note. Only the Letter Generation process can change the Ready to Delete flag.

The section *Delete result table (includes non-encrypted passwords)* includes the following options:

Delete rows including	Select this check box if you want to delete only selected rows in the result table. If you select this check box, select a criterion and value to be used.
Criteria	<p>Select a criterion to be used to delete specific rows in the result table. You can select only one of the following criteria.</p> <ul style="list-style-type: none"> • <i>ID</i>: Select to delete the row for a particular person with the employee ID that you select in the Value field. • <i>Event 3C IDs</i>: Select to delete all rows associated with the event ID that you select in the Value field. • <i>Rolename</i>: Select to delete all rows associated with the role that you select in the Value field. • <i>User ID</i>: Select to delete the row for a particular person with the user ID that you select in the Value field.
Value	Select the value you want to be used for the criterion that you selected.
Ready to Delete	Select this option if you want to delete only those rows where the READY_TO_DEL field in the temporary result table is set to <i>Yes</i> . This option prevents you from deleting the rows where the Letter Generation process has not yet been run.
Delete all (radio button/option)	Select this option to delete rows in the temporary result table where the READY_TO_DEL field is set to <i>Yes</i> or <i>No</i> .

Warning! If you select this option, you may delete rows for which the Letter Generation process has not run, and you delete the user ID and password information. There is no way to recover this information unless you reset all the passwords manually.

Delete All (check box)

Select this check box if you want to delete rows in the temporary result table without specifying any criteria. As previously described, you can also select to delete the rows marked as Ready to delete or Delete all.

Warning! If you select Delete All, you may delete rows for which the Letter Generation process has not run, and you delete the user ID and password information. There is no way to recover this information unless you reset all the passwords manually.

Explain

Use these links to see the explanation for the selected check box.

Click the Delete button to delete the selected temp tables and the selected rows in the result table. When you click Delete, you receive a warning message letting you know that you are about to delete data from the system and asking if you want to continue.

Note. The Ready to Delete and Delete all options work in conjunction with the Delete rows including and Delete All check boxes. For example, if you elect to delete certain rows based on a selected criterion and you select the Delete all option, only the rows selected by the criteria are deleted. Similarly, if you select the Delete All check box and select the Ready to Delete option, only the rows where the READY_TO_DEL field is set to *Yes* are deleted.

The fields in this area of the application page allow you to delete rows of data from the temporary result table (PS_USRPRF_LTR_COMM) that is created if you selected the Create Result Table check box on the User Profile Mass Creation page. This is the only place where the non-encrypted passwords are stored. It is your responsibility to frequently run the cleanup process.

The temporary result table includes a column called Ready To Delete (READY_TO_DEL) that is a Y (yes) or N (no) flag for each user ID. When the User Profiles Management process runs and the Create Result Table option is selected in the setup page (Setup SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation), the User Profiles Management process determines if the flag should be a Y or a N based on the Event ID you selected.

The User Profiles Management process sets the flag to N (meaning not ready to be deleted) when the Assign 3C check box is checked on the User Profile Mass Creation setup page and the Event ID specified includes a letter code set up with the Name SQC equal to CCLTRWOL. This SQC is used by the Letter Generation process to extract the user ID and the password and make the information available to add on a communication. Do not delete rows in this table if the Letter Generation process has not been run yet. Once the Letter Generation process is run, it changes the flag to Y to indicate the user ID row is now ready to be deleted.

Task 2-9: Installing PeopleSoft Student Administration Integration Pack

This section discusses:

- Setting Up Installation Options
- Installing Additional Database Changes Using PeopleSoft Data Mover
- Running Conversion Programs Using PeopleSoft Application Engine
- Activating PeopleSoft Student Administration Integration Pack Service Operations and Handlers

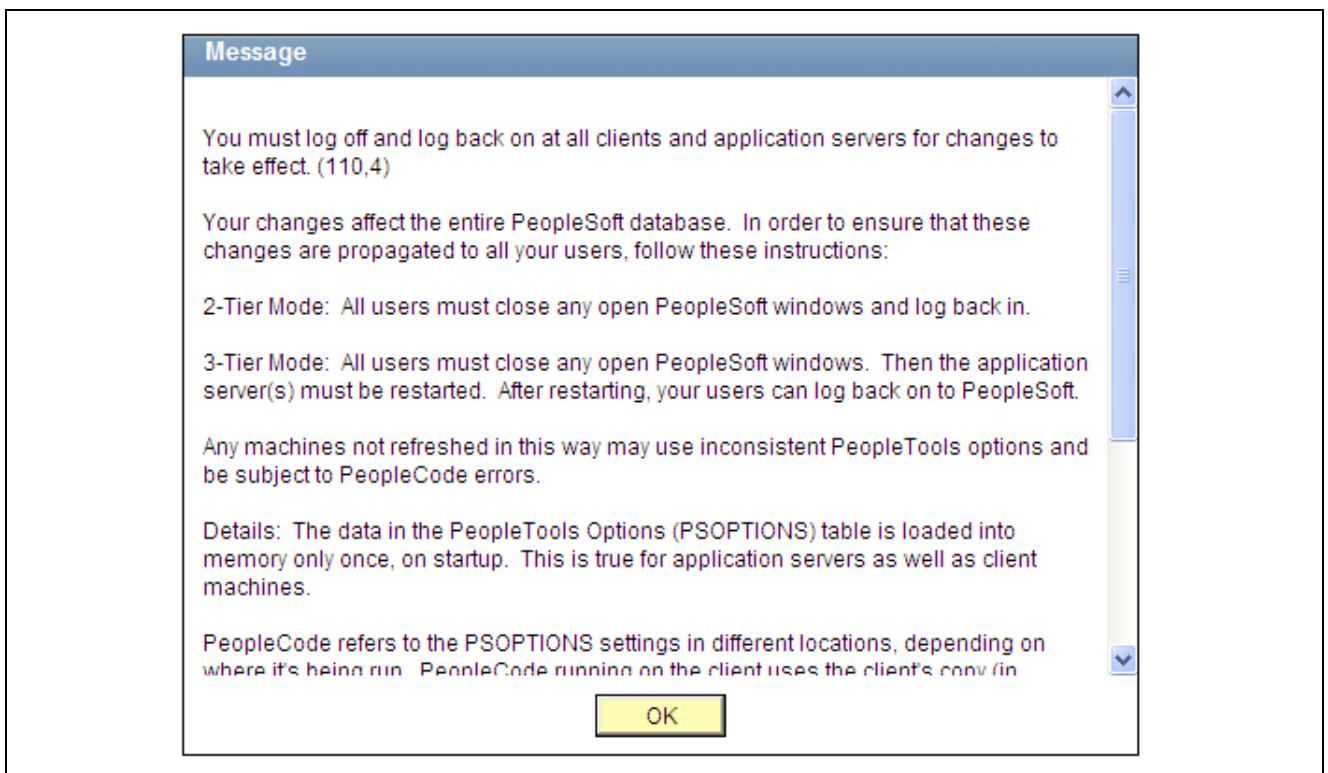
- Activating PeopleSoft Student Administration Integration Pack Service Routings
- Activating PeopleSoft Student Administration Integration Pack Queues

Task 2-9-1: Setting Up Installation Options

Oracle recommends that you update the PeopleSoft Student Administration Integration Pack (SAIP) indicator on the Installation page on both your SYS and DMO databases to ensure that the license for the product is turned on and recognized.

Log in to the PeopleSoft application in a browser and select Set Up HRMS, Install, Installation Table. On the Products page, select the SA Integration Pack check box.

After making changes to the Installation table, you will receive the information message that follows. You then need to log off all clients and shut down and restart all application servers, and then log back on for the change to take effect.



Informational message

See PeopleSoft PeopleTools, Integration Broker PeopleBook for your database platform and for your current PeopleTools release.

Task 2-9-2: Installing Additional Database Changes Using PeopleSoft Data Mover

Run the following script in PeopleSoft Data Mover to initialize the PeopleSoft SAIP set up table.

DMS File Name	Data File	File Description
saip_setup_init.dms	saip_setup_init.dat	Installation tables initialization.

Task 2-9-3: Running Conversion Programs Using PeopleSoft Application Engine

Run the following scripts to initially synchronize PeopleSoft SAIP extension tables with their corresponding PeopleSoft Campus Solutions tables.

To run PeopleSoft Application Engine, run psae.exe in the directory PS_HOME\bin\client\winx86.

Note. You can also run these conversion programs by logging into PeopleSoft in the browser and selecting PeopleTools, Application Engine, Request AE.

Application Engine Program	Description
SAE_CMBN_EXT	Populates the SAE_CMBN_EXT table based on the SCTN_CMBND table.
SAE_CSEC_EXT	Populates the SAE_CLASS_EXT table based on the CLASS_TBL table.
SAE_CTLG_EXT	Populates the SAE_CRSCTLG_EXT tables based on the CRSE_CATALOG table.
SAE_MBRN_EXT	Populates the SAE_INSTR_EXT table based on the CLASS_INSTR table.
SAE_OFFR_EXT	Populates the SAE_CRSOFFER_EXT table based on the CRSE_OFFER table.
SAE_TERM_EXT	Populates the SAE_TERM_EXT table based on the TERM_TBL table.
SAE_SESS_EXT	Populates the SAE_SESSION_EXT table based on the SESSION_TBL table.

Task 2-9-4: Activating PeopleSoft Student Administration Integration Pack Service Operations and Handlers

Service operations for the PeopleSoft Student Administration Integration Pack (SAIP) are delivered with a status of “Inactive” in order to prevent the accidental transmission of data. In order to make use of these key elements of the PeopleSoft SAIP at the time of implementation, you need to set each of them to a status of “Active”.

To activate service operations:

1. Log into the PeopleSoft application in a browser.
2. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
3. Select each of the service operations from the table that follows.
4. On the General page, select the Active check box in the Default Service Operation Version group.
5. Select the Handlers page and select the Active check box from the drop-down list for the Status column.
6. Save the page.

SCC Services.

- Here are the Service Operations and Handlers for the service SCC_INTEGRATION_SERVICE:

Service Operation	Handler
PUBLISHACADORG	NOTIFYHNDLR
PUBLISHACADORTOTARGET	NOTIFYHNDLR
PUBLISHCLASSESECTION	NOTIFYHNDLR
PUBLISHCOMBINEDSECTION	NOTIFYHNDLR
PUBLISHCOURSETEMPLATE	NOTIFYHNDLR
PUBLISHINSTITUTION	NOTIFYHNDLR
PUBLISHINSTITUTIONTOTARGET	NOTIFYHNDLR
PUBLISHPERSON	NOTIFYHNDLR
PUBLISHSTDNTCAREERTERM	NOTIFYHNDLR
PUBLISHSTUDENTENROLLMENT	NOTIFYHNDLR
PUBLISHTERM	NOTIFYHNDLR

- Here are the Service Operation and Handler for the service SCC_URL_ADDRESSES:

Service Operation	Handler
SCC_URL_ADDRESSES_CHANGE_EVENT	SCC_URL_ADDRESSES_CHANGE_EVENT

SAIP v1.0/v1.5 Service Operations

- Here are the Service Operations and Handlers for the service SAIP_INTEGRATION_SERVICE (Event):

Service Operation	Handler
NOTIFYGROUP	NOTIFYHNDLR
NOTIFYPERSON	NOTIFYHNDLR
NOTIFYMEMBERSHIP	NOTIFYHNDLR
NOTIFYCLASSESECTION	NOTIFYHNDLR
NOTIFYCOURSEOFFERING	NOTIFYHNDLR
NOTIFYCOURSETEMPLATE	NOTIFYHNDLR
NOTIFYSECTIONASSOCIATION	NOTIFYHNDLR

- Here are the Service Operation and Handler for the service SAIP_INTEGRATION_SERVICE (Snapshot):

Service Operation	Handler
NOTIFYSNAPSHOTRESPONSE	NOTIFYHNDLR

- Here are the Service Operation and Handler for the service OUTCOMESERVICE:

Service Operation	Handler
READOUTCOMES	ROUTERRECHDLR

SAIP Event Services v1.0/v1.5

- Here are the Service Operations and Handlers for the service GROUPMANAGEMENTSERVICE:

Service Operation	Handler
CREATEGROUP	None
DELETEDGROUP	None
UPDATEGROUP	None

- Here are the Service Operations and Handlers for the service PERSONMANAGEMENTSERVICE:

Service Operation	Handler
CREATEPERSON	None
REPLACEPERSON	None

- Here are the Service Operations and Handlers for the service COURSEMANAGEMENTSERVICE:

Service Operation	Handler
CREATEBATCHCOURSESECTION	None
CREATECOURSEOFFERING	None
CREATECOURSESECTION	None
CREATECOURSETEMPLATE	None
CREATESECTIONASSOCIATION	None
DETEECOURSEOFFERING	None
DETEECOURSESECTION	None
DETEECOURSETEMPLATE	None
DETEESECTIONASSOCIATION	None
UPDATECOURSEOFFERING	None
UPDATECOURSESECTION	None
UPDATECOURSETEMPLATE	None
UPDATESECTIONASSOCIATION	None

- Here are the Service Operations and Handlers for the service MEMBERSHIPMANAGEMENTSERVICE:

Service Operation	Handler
CREATEMEMBERSHIP	None
CREATEMEMBERSHIPS	None
DELETEMEMBERSHIP	None

- Here are the Service Operation and Handler for the service PERSON_BASIC_SYNC:

Service Operation	Handler
PERSON_BASIC_SYNC	SCC_PERSON

SAIP Snapshot Services v1.0/v1.5

- Here are the Service Operations and Handlers for the service GROUPMANAGEMENTSERVICE (Supported Services):

Service Operation	Handler
READGROUPSMGMT	REQUESTHDLR
READGROUPSFROMSAVEPOINT	REQUESTHDLR

- Here are the Service Operations and Handlers for the service GROUPMANAGEMENTSERVICE (Unsupported Services):

Service Operation	Handler
ADDGROUPRELATIONSHIP_SYNC	REQUESTHDLR
CHANGEGROUPIDENTIFIER_SYNC	REQUESTHDLR
CREATEBYPROXYGROUP_SYNC	REQUESTHDLR
CREATEGROUP_SYNC	REQUESTHDLR
DELETEGROUP_SYNC	REQUESTHDLR
DISCOVERGROUPIDS_SYNC	REQUESTHDLR
READALLGROUPIDS_SYNC	REQUESTHDLR
READGROUPIDSFORPERSON_SYNC	REQUESTHDLR
READGROUPIDSFROMSAVEPOINT_SYNC	REQUESTHDLR
READGROUP_SYNC	REQUESTHDLR
REMOVEGROUPRELATIONSHIP_SYNC	REQUESTHDLR
REPLACEGROUP_SYNC	REQUESTHDLR
UPDATEGROUP_SYNC	REQUESTHDLR

- Here are the Service Operations and Handlers for the service PERSONMANAGEMENTSERVICE (Supported Services):

Service Operation	Handler
READPERSONS	REQUESTHDLR
READPERSONSFROMSAVEPOINT	REQUESTHDLR

- Here are the Service Operations and Handlers for the service PERSONMANAGEMENTSERVICE (Unsupported Services):

Service Operation	Handler
CHANGEPERSONIDENTIFIER_SYNC	REQUESTHDLR
CREATEBYPROXYPERSON_SYNC	REQUESTHDLR
CREATEPERSON_SYNC	REQUESTHDLR
DELETEPERSON_SYNC	REQUESTHDLR
DISCOVERPERSONIDS_SYNC	REQUESTHDLR
READALLPERSONIDS_SYNC	REQUESTHDLR
READPERSONCORE_SYNC	REQUESTHDLR
READPERSONIDSFROMSAVPOINT_SYNC	REQUESTHDLR
READPERSON_SYNC	REQUESTHDLR
REPLACEPERSON_SYNC	REQUESTHDLR
UPDATEPERSON_SYNC	REQUESTHDLR

- Here are the Service Operations and Handlers for the service COURSEMANAGEMENTSERVICE (Supported Services):

Service Operations	Handlers
READCOURSEOFFERINGS	REQUESTHDLR
READCOURSEOFFERINGSFRSAVEPT	REQUESTHDLR
READCOURSESECTIONS	REQUESTHDLR
READCOURSESECTIONSFROMSP	REQUESTHDLR
READCOURSETEMPLATES	REQUESTHDLR
READCOURSETEMPLATESFRSAVEPT	REQUESTHDLR
READSECTIONASSOCIATIONS	REQUESTHDLR
READSECTIONASSOCIATIONSFRSVPT	REQUESTHDLR

- Here are the Service Operations and Handlers for the service COURSEMANAGEMENTSERVICE (Unsupported Services):

Service Operations	Handlers
ADDCOURSESECTIONID_SYNC	REQUESTHDLR
CHANGECOURSESECIDENTIFIER_SYNC	REQUESTHDLR
CHANGECSRSEOFFERIDENTIFIER_SYNC	REQUESTHDLR
CHANGECSRSETEMPIDENTIFIER_SYNC	REQUESTHDLR
CHANGESECASSOCIDENTIFIER_SYNC	REQUESTHDLR
CREATEBYPROXYCOURSESEC_SYNC	REQUESTHDLR
CREATEBYPROXYCRSEOFFERING_SYNC	REQUESTHDLR
CREATEBYPROXYCRSETEMPLATE_SYNC	REQUESTHDLR
CREATEBYPROXYSECASSOC_SYNC	REQUESTHDLR
CREATECOURSEOFFERING_SYNC	REQUESTHDLR
CREATECOURSESECFCS_SYNC	REQUESTHDLR
CREATECOURSESECTION_SYNC	REQUESTHDLR
CREATECOURSETEMPLATE_SYNC	REQUESTHDLR
CREATEOFFERFROMCRSEOFFER_SYNC	REQUESTHDLR
CREATESECTIONASSOCIATION_SYNC	REQUESTHDLR
DELETECOURSEOFFERING_SYNC	REQUESTHDLR
DELETECOURSESECTION_SYNC	REQUESTHDLR
DELETECOURSETEMPLATE_SYNC	REQUESTHDLR
DELETESECTIONASSOCIATION_SYNC	REQUESTHDLR
DISCOVERCOURSEOFFERINGIDS_SYNC	REQUESTHDLR
DISCOVERCOURSESECTIONIDS_SYNC	REQUESTHDLR
DISCOVERCOURSETEMPLATEIDS_SYNC	REQUESTHDLR
DISCOVERSECTIONASSOCIDS_SYNC	REQUESTHDLR
READALACTOFFRIDSFORACDSES_SYNC	REQUESTHDLR
READALLCOURSEOFFERINGIDS_SYNC	REQUESTHDLR
READALLCOURSESECTIONIDS_SYNC	REQUESTHDLR

Service Operations	Handlers
READALLCOURSETEMPLATEIDS_SYNC	REQUESTHDLR
READALLSECTIONASSOCIDS_SYNC	REQUESTHDLR
READCOURSEOFFERINGIDSFSP_SYNC	REQUESTHDLR
READCOURSESECTION_SYNC	REQUESTHDLR
READCOURSETEMPLATEIDSFSP_SYNC	REQUESTHDLR
READCOURSEOFFERING_SYNC	REQUESTHDLR
READCOURSESECTIONIDSFSP_SYNC	REQUESTHDLR
READCOURSETEMPLATE_SYNC	REQUESTHDLR
READCRSEOFFERIDSFORTEMP_SYNC	REQUESTHDLR
READCRSESECIDSFOROFFER_SYNC	REQUESTHDLR
READSECTIONASSOCIATION_SYNC	REQUESTHDLR
READSECTIONASSOCIDSFSP_SYNC	REQUESTHDLR
REMOVECOURSESECTIONID_SYNC	REQUESTHDLR
REPLACECOURSEOFFERING_SYNC	REQUESTHDLR
REPLACECOURSESECTION_SYNC	REQUESTHDLR
REPLACECOURSETEMPLATE_SYNC	REQUESTHDLR
REPLACESECTIONASSOCIATION_SYNC	REQUESTHDLR
UPDATECOURSEOFFERING_SYNC	REQUESTHDLR
UPDATECOURSESECTIONSTATUS_SYNC	REQUESTHDLR
UPDATECOURSESECTION_SYNC	REQUESTHDLR
UPDATECOURSETEMPLATE_SYNC	REQUESTHDLR
UPDATECRSEOFFERINGSTATUS_SYNC	REQUESTHDLR
UPDATESECTIONASSOCIATION_SYNC	REQUESTHDLR

- Here are the Service Operations and Handlers for the service MEMBERSHIPMANAGEMENTSERVICE (Supported Services):

Service Operation	Handler
READMEMBERSHIPS	REQUESTHDLR
READMEMBERSHIPFROMSAVEPOINT	REQUESTHDLR

- Here are the Service Operations and Handlers for the service MEMBERSHIPMANAGEMENTSERVICE (Unsupported Services):

Service Operation	Handler
CHANGEMEMBERIDENTIFIER_SYNC	REQUESTHDLR
CREATEBYPROXYMEMBERSHIP_SYNC	REQUESTHDLR
CREATEMEMBERSHIP_SYNC	REQUESTHDLR
DELETEMEMBERSHIP_SYNC	REQUESTHDLR
DISCOVERMEMBERSHIPIDS_SYNC	REQUESTHDLR
READALLMEMBERSHIPIDS_SYNC	REQUESTHDLR
READMEMBERSHIPIDSFORCOLL_SYNC	REQUESTHDLR

Service Operation	Handler
READMEMBERSHIPIDSFORPWR_SYNC	REQUESTHDLR
READMEMBERSHIPIDSFSP_SYNC	REQUESTHDLR
READMEMBERSHIPIDSPERSON_SYNC	REQUESTHDLR
READMEMBERSHIP_SYNC	REQUESTHDLR
REPLACEMEMBERSHIP_SYNC	REQUESTHDLR
UPDATEMEMBERSHIP_SYNC	REQUESTHDLR

- Here are the Service Operation and Handler for the service BULKDATAEXCHANGEMGMTSERVICE (Supported Service):

Service Operation	Handler
ANNOUNCEBULKDATAEXCHANGE	None

LIS2.0 Services for SAIP

- Here are the Service Operations and Handlers for the service SAIP_INTEGRATION_SERVICE (Snapshot):

Service Operation	Handler
NOTIFYANNOUNCEBULKDATAEXCHANGE	NOTIFYHNDLR
NOTIFYANNOUNCEFAILUREBULKDATA	NOTIFYHNDLR

- Here are the Service Operations and Handlers for the service OUTCOMESERVICE:

Service Operation	Handler
SAE_READRESULTIDS	None
SAE_READRESULTS	None
SAE_REPLACE_LINE_ITEM	REQUESTHDLR
SAE_REPLACE_RESULTS	REQUESTHDLR

SAIP Event Services v2.0

- Here are the Service Operations and Handlers for the service GROUPMANAGEMENTSERVICE:

Service Operation	Handler
REPLACEGROUP	None
DELETEDGROUP	None

- Here are the Service Operation and Handler for the service PERSONMANAGEMENTSERVICE:

Service Operation	Handler
REPLACEPERSON	None

- Here are the Service Operations and Handlers for the service COURSEOFFERINGSERVICE:

Service Operation	Handler
REPLACECOURSEOFFERING	None
DELETECOURSEOFFERING	None

- Here are the Service Operations and Handlers for the service COURSESECTIONSERVICE:

Service Operation	Handler
REPLACECOURSESECTION	None
DELETECOURSESECTION	None

- Here are the Service Operations and Handlers for the service COURSETEMPLATESERVICE:

Service Operation	Handler
REPLACECOURSETEMPLATE	None
DELETECOURSETEMPLATE	None

- Here are the Service Operations and Handlers for the service SECTIONASSOCIATIONSERVICE:

Service Operation	Handler
REPLACESECTIONASSOCIATION	None
DELETEASSOCIATION	None

- Here are the Service Operations and Handlers for the service MEMBERSHIPMANAGEMENTSERVICE:

Service Operation	Handler
REPLACEMEMBERSHIP	None
DELETEMEMBERSHIP	None

SAIP Snapshot Services v2.0

Here are the Service Operations and Handlers for the service BULKDATAEXCHANGEMGMTSERVICE:

Service Operation	Handler
ANNOUNCEBULKDATAEXCHANGE_V2	None
ANNOUNCEFAILBULKDATAEXCHANGE	None
CANCELBULKDATAEXCHANGE	REQUESTHDLR
IGNOREBULKDATAEXCHANGE	REQUESTHDLR
REPORTBULKDATAEXCHANGE	REQUESTHDLR
REQUESTBULKDATAEXCHANGE	REQUESTHDLR

Note. The IMS Learning Information Services 2.0 specification defines a broad range of service operations. The SAIP delivers many of these operations in an unsupported fashion; those operations are not used within the SAIP, but in compliance with the LIS 2.0 specification will return an “Unsupported” response message if invoked from an external system.

Task 2-9-5: Activating PeopleSoft Student Administration Integration Pack Service Routings

Routings from the PeopleSoft SAIP are delivered with a status of “Inactive” in order to prevent the accidental transmission of data. In order to make use of these key elements of the PeopleSoft SAIP at implementation time, set each of the key elements to a status of “Active”.

To activate routings:

1. Log in to the PeopleSoft application in a browser.
2. Select PeopleTools, Integration Broker, Integration Setup, Routings.
3. Select each of the routings in the table that follows.
4. On the Routing Definition page, select the Active check box for each routing.
5. Save the page.

Routing

- ANNOUNCEBULKDATAEXCHANGE
- CHANGEMEMBERIDENTIFIER_SYNC
- CREATEBYPROXYMEMBERSHIP_SYNC
- CREATECOURSESECFCS_SYNC
- CREATEMEMBERSHIP_SYNC
- DELETEMEMBERSHIP_SYNC
- DISCOVERMEMBERSHIPIDS_SYNC
- LOCALONE
- NOTIFYANNOUNCEBULKDATAEXCHANGE
- NOTIFYCLASSESECTION
- NOTIFYCOURSEOFFERING
- NOTIFYCOURSETEMPLATE
- NOTIFYGROUP
- NOTIFYMEMBERSHIP
- NOTIFYPERSON
- NOTIFYSECTIONASSOCIATION
- NOTIFYSNAPSHOTRESPONSE
- PUBLISHACADORG
- PUBLISHACADORGTTOTARGET
- PUBLISHCLASSESECTION
- PUBLISHCOMBINEDSECTION
- PUBLISHCOURSETEMPLATE
- PUBLISHINSTITUTION
- PUBLISHINSTITUTIONTTOTARGET

- PUBLISHPERSON
- PUBLISHSTDNTCAREERTERM
- PUBLISHSTUDENTENROLLMENT
- PUBLISHTERM
- READALLMEMBERSHIPIDS_SYNC
- READMEMBERSHIP_SYNC
- READMEMBERSHIPIDSFORCOLL_SYNC
- READMEMBERSHIPIDSFORPWR_SYNC
- READMEMBERSHIPIDSFSP_SYNC
- READMEMBERSHIPIDSPERSON_SYNC
- REPLACEMENTMEMBERSHIP_SYNC
- SAE_ADDCOURSESECTIONID_SYNC
- SAE_ADDGROUPRELATIONSHIP_SYNC
- SAE_CANCELBULKDATAEXCHANGE
- SAE_CHANGECOURSESECIDENTIFIER
- SAE_CHANGECRSETEMPIDENT_SYNC
- SAE_CHANGEGROUPIDENTIFIER_SYNC
- SAE_CHANGEOFFERIDENTIFIER_SYNC
- SAE_CHANGEPERSONIDENTIFIER_SYNC
- SAE_CHANGESECASSOCIDENT_SYNC
- SAE_COURSEOFFERINGS_INC_SNAP
- SAE_COURSETEMPLATE_INC_SNAP
- SAE_CREATEBYPROXYCOURSESEC_SYNC
- SAE_CREATEBYPROXYCRSETEMP_SYNC
- SAE_CREATEBYPROXYGROUP_SYNC
- SAE_CREATEBYPROXYPERSON_SYNC
- SAE_CREATEBYPROXYSECASSOC_SYNC
- SAE_CREATEBYPRXYCRSEOFFER_SYNC
- SAE_CREATECOURSEOFFERING_SYNC
- SAE_CREATECOURSESECTION_SYNC
- SAE_CREATECOURSETEMPLATE_SYNC
- SAE_CREATEGROUP_SYNC
- SAE_CREATEOFFERFROMOFFER_SYNC
- SAE_CREATEPERSON_SYNC
- SAE_CREATESECTIONASSOC_SYNC
- SAE_DELETECOURSEOFFERING_SYNC

- SAE_DELETECOURSESECTION_SYNC
- SAE_DELETECOURSETEMPLATE_SYNC
- SAE_DELETEGROUP_SYNC
- SAE_DELETEPERSON_SYNC
- SAE_DELETESECTIONASSOC_SYNC
- SAE_DISCCRSETEMPLATEIDS_SYNC
- SAE_DISCOVERCOURSESECIDS_SYNC
- SAE_DISCOVERCRSEOFFERIDS_SYNC
- SAE_DISCOVERGROUPIDS_SYNC
- SAE_DISCOVERPERSONIDS_SYNC
- SAE_DISCOVERSECASSOCIDS_SYNC
- SAE_IGNOREBULKDATAEXCHANGE
- SAE_LMS_BAT_CRSE_SEC_CREATE
- SAE_NOTIFYANNOUNCEFAILUREBULK
- SAE_PERSONIDSFROMSAVPOINT_SYNC
- SAE_READALACTOFFRIDSACD_SYNC
- SAE_READALLCOURSESECIDS_SYNC
- SAE_READALLCRSEOFFERIDS_SYNC
- SAE_READALLCRSETEMPIDS_SYNC
- SAE_READALLGROUPIDS_SYNC
- SAE_READALLPERSONIDS_SYNC
- SAE_READALLSECASSOCIDS_SYNC
- SAE_READCOURSEOFFERING_SYNC
- SAE_READCOURSEOFFERINGS_SNAP
- SAE_READCOURSESECIDSFSP_SYNC
- SAE_READCOURSESECTION_SYNC
- SAE_READCOURSESECTIONS_SNAP
- SAE_READCOURSESECTIONSFROMSP
- SAE_READCOURSETEMPLATE_SYNC
- SAE_READCOURSETEMPLATES_SNAP
- SAE_READCRSEOFFERIDSFSP_SYNC
- SAE_READCRSETEMPIDSFSP_SYNC
- SAE_READGROUP_SYNC
- SAE_READGROUPIDSFORPERSON_SYNC
- SAE_READGROUPIDSFSP_SYNC
- SAE_READGROUPS_SNAP

- SAE_READGROUPSFROMSAVEPOINT
- SAE_READMEMBERSHIPS_INC_SNAP
- SAE_READMEMBERSHIPS_SNAP
- SAE_READOFFERIDSFORTEMP_SYNC
- SAE_READPERSON_SYNC
- SAE_READPERSONCORE_SYNC
- SAE_READPERSONS_INC_SNAP
- SAE_READPERSONS_SNAP
- SAE_READSECASSOCIATIONS_SNAP
- SAE_READSECASSOCIDSFSP_SYNC
- SAE_READSECIDSFOROFFER_SYNC
- SAE_READSECTIONASSOC_SYNC
- SAE_REMOVECOURSESECTIONID_SYNC
- SAE_REMOVEGROUPRELATIONSHIP
- SAE_REPLACE_LINE_ITEM
- SAE_REPLACE_RESULTS
- SAE_REPLACECOURSEOFFERING_SYNC
- SAE_REPLACECOURSESECTION_SYNC
- SAE_REPLACECOURSETEMPLATE_SYNC
- SAE_REPLACEGROUP_SYNC
- SAE_REPLACEPERSON_SYNC
- SAE_REPLACESECTIONASSOC_SYNC
- SAE_REPORTBULKDATAEXCHANGE
- SAE_REQUESTBULKDATAEXCHANGE
- SAE_SECTIONASSOCIATIONS_INC_SP
- SAE_UPDATECOURSEOFFERING_SYNC
- SAE_UPDATECOURSESECTION_SYNC
- SAE_UPDATECOURSESECTIONSTATUS
- SAE_UPDATECOURSETEMPLATE_SYNC
- SAE_UPDATECRSEOFFERSTATUS_SYNC
- SAE_UPDATEGROUP_SYNC
- SAE_UPDATEPERSON_SYNC
- SAE_UPDATESECTIONASSOC_SYNC
- SCC_URL_ADDRESSES_LOCAL
- UPDATEMEMBERSHIP_SYNC

Task 2-9-6: Activating PeopleSoft Student Administration Integration Pack Queues

Queues for the PeopleSoft SAIP are delivered with a status of “Pause” in order to prevent the accidental transmission of data. In order to make use of these key elements of the PeopleSoft SAIP at implementation time, you need to set each of the key elements to a status of “Run.”

To set run status:

1. Log in to the PeopleSoft application in a browser.
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.
3. Select each of the Queues in the table that follows.
4. For each Queue, select Run from the Queue Status drop-down menu.
5. Save the page.

IB Queue Name	Status	Description
SCC_QUEUE	RUN	Core CS Events Queue
SAE_QUEUE	RUN	SAIP Queue for publish events
SAE_SNAPSHOT_QUEUE	RUN	SAIP Queue for Snapshot announce events
SCC_URL_ADDRESSES	RUN	Campus Community Queue for URL events
PERSON_DATA	RUN	Queue for Person Events

Note. In order for the SAIP to be functional, SAIP service operations, handlers, routings and queues must be active. If you wish to activate all the delivered SAIP Integration Broker objects (service operations, handlers, routings, queues), you should run the script `upd812869_32.dms`, which can be found in `%ps_home%\scripts` where `%ps_home%` is your root PeopleTools directory. If you are attempting to implement SAIP prior to application of Bundle #22, you can request the workaround script `SAIPActiveIBObjects.dms` from Oracle Global Support Services; this script will activate the relevant Integration Broker objects, delivered prior to Bundle #22.

Task 2-10: Installing PeopleSoft Contributor Relations

Use PeopleSoft Data Mover in bootstrap mode to run the following script, which will import the attachment definitions and URLs required by the attachment functionality in PeopleSoft Contributor Relations.

DMS File Name	Data File	File Description
scc_attach_imp.dms	scc_attach_imp.dat	Load attachments framework system data.

Index

A

Academic Advising, CPU space 37
address validation, HCM for
Switzerland 10

C

Campus Solutions COBOL on DB2 z/OS,
reviewing 4
CHE_ADDR_DBCS.DMS 10
CHE_ADDR.DMS 10
COBOL for Student Administration 29
CommonLine processing, using for
Financial Aid 35
Contributor Relations, installing 54

D

DB2 z/OS, re-ordering PeopleTools install
steps 3
Demo database, approximate sizing 2

E

EDM pool size 3
Equation Engine, setting up security 29
equation security 29

G

Global search, HCM for Japan 8
gpcerate_exp.dms script 16
gpcerate_imp.dms script 16
gpcesys.dms script 16

H

HC9MAINTLOG_I.DMS script 3
hapiadpi.dms script 24
HRINSSYS.DMS script 2

I

Installation Table
option for Education and
Government 6
option for Military customers 6

J

Japan product, phone and FAX number
field 9
Japanese characters, printing 9

L

LDAP-enabled directory server for
Directory Interface 22

P

Packager, updating 12
Pay/Bill Management, integrating with
FSCM 24
PDF form files 20
PeopleBooks, checking sensitive
information 37
phone and FAX numbers in HCM for
Japan 9

R

rate codes, copying 16
Resume Processing in Talent Acquisition
Manager, installing 14

S

Service Operations, activating for Pay/Bill
Management 24
SQR reports
printing Japanese characters 9
Student Administration 29
Student Administration Integration Pack,
installing 40
Student Administration, activating
queues 54
Student Administration, activating service
operations 42
Student Administration, activating service
routings 50
Student Administration, installation
options 41
Student Administration, installing database
changes 41
Student Administration, running conversion
programs 42

T

time zone offsets 10

U

updating Packager 12

user ID security 37

