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PeopleSoft Customer Relationship Management 9.1 Installation Guide

June 2012

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PeopleSoft Customer Relationship Management 9.1
Installation Guide
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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.

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.

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- 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 My Oracle Support

Typographical Conventions

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

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

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

Products

This documentation may refer to these products and product families:

- Oracle® BPEL Process Manager
- Oracle® Enterprise Manager
- Oracle® Tuxedo
- Oracle® WebLogic Server
- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Change Impact Analyzer
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Customer Relationship Management
- Oracle's PeopleSoft Financial Management
- Oracle's PeopleSoft Human Capital Management
- 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.

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Note. For integrations, please refer to *PeopleSoft PeopleTools 8.52: Security Administration* under the section *Working with User Profiles Across Multiple PeopleSoft Databases*.

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

Related Information

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

- 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.

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CHAPTER 1

Installing PeopleSoft CRM 9.1 Applications

This chapter discusses:

- Understanding the PeopleSoft CRM Installation
- Using the Oracle Software Delivery Cloud to Obtain Installation Files
- Installing PeopleSoft PeopleTools and Databases
- Setting Up the PeopleSoft CRM Database
- Configuring an FTP Server for Storing Attachments
- Setting Start Values for Auto-Numbered Fields
- Configuring Computer Telephony Integration
- Activating Basic Data Summary and Messaging
- Setting Up the PeopleSoft Integration Broker
- Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture

Understanding the PeopleSoft CRM Installation

This guide details the tasks necessary to install PeopleSoft Customer Relationship Management (CRM) 9.1 applications. Perform the tasks in this guide after you successfully complete the PeopleSoft PeopleTools installation, as instructed in the PeopleSoft PeopleTools 8.52 Installation guide for your database platform.

See PeopleSoft PeopleTools 8.52 Installation for your database platform, available on My Oracle Support.

Oracle uses application productivity packs to deliver cumulative fixes and minor enhancements between service packs for major or minor application releases. These productivity packs are useful if you are upgrading or implementing a new release and want to ensure that you have the latest updates and fixes, before or shortly after going live.

Productivity packs:

- Oracle delivers quarterly for the latest release.
- You can order through Oracle's PeopleSoft Customer Care and receive by download or on a CD.
- Oracle supports for the duration of the major or minor release support.

Oracle recommends that you apply service packs or application bundles as they become available to benefit from the latest product level. If you fall behind on application bundles and cannot wait for the next service pack, the productivity pack provides all of the latest updates and fixes on one CD.

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Note. Oracle recommends that you consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index, available on My Oracle Support, to determine which PeopleSoft PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

See PeopleSoft CRM 9.1 Product-to-PeopleBook Index, available on My Oracle Support.

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

Before you begin the installation, you must obtain the PeopleSoft Customer Relationship Management 9.1 installation software by downloading the necessary zip files from the Oracle Software Delivery Cloud portal. Use the documentation available on Oracle Software Delivery Cloud to ensure that you obtain all of the zip files that your environment requires.

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

Task 1-2: Installing PeopleSoft PeopleTools and Databases

This section discusses:

- Installing PeopleSoft PeopleTools
- Reviewing the Demo Database Sizing
- Installing Application Files to the Custom PS_APP_HOME Location
- Creating and Configuring a Search Collection on UNIX
- Installing Multilingual File References and Maintenance Log Data
- Reviewing SWPAUDIT Results

Task 1-2-1: Installing PeopleSoft PeopleTools

Install PeopleSoft PeopleTools as the “PeopleSoft PeopleTools 8.52 Installation Guide” details for your database platform.

See PeopleSoft PeopleTools 8.52 Installation Guide for your database platform, available on My Oracle Support.

PeopleSoft CRM requires that you specify a process scheduler server to use for workflow processes. If you choose to dedicate a workflow server, you must set one up as you complete the tasks in the PeopleSoft PeopleTools 8.52 Installation guide, "Setting Up Process Scheduler." You must specify a PeopleSoft CRM workflow server, regardless of whether choose to dedicate a server.

See *PeopleSoft CRM 9.1: Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow."

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Note. PeopleSoft CRM applications do not use any COBOL batch processes. If PeopleSoft CRM is the only PeopleSoft product line that you are installing, you do not need to run PSRUN.MAK or compile or link any COBOL programs.

Note. PeopleSoft PeopleTools release 8.52 with minimum patch level 06 or higher is required at installation or upgrade.

Note. Asian language (Simplified Chinese, Traditional Chinese, Korean and Japanese) customers are required to install PeopleSoft PeopleTools 8.50 Patch 11 or higher after installing the CRM91 multilingual media pack.

Note. For the additional component software that writes to PS_HOME, if you are setting up your PS_HOME as a *read-only* environment, the Application Server Administrator must have read and write access to PS_HOME.

For information on setting up PS_HOME as a *read-only* environment, see *PeopleTools 8.52: System and Server Administration PeopleBook,"Securing PS_HOME and PS_CFG_HOME"*

See *PeopleTools 8.52: System and Server Administration PeopleBook* "Securing PS_HOME and PS_CFG_HOME"

Task 1-2-2: Reviewing the Demo Database Sizing

This table lists Demo database requirements for PeopleSoft CRM by RDBMS platform:

Platform	Approximate Database Size
DB2 LUW Non-Unicode	7.8 GB
DB2 LUW Unicode	11 GB
DB2 z/OS Non-Unicode	8.2 GB
DB2 z/OS Unicode	8.9 GB
Microsoft SQL Server Non-Unicode	1.4 GB
Microsoft SQL Server Unicode	1.9 GB
Oracle Non-Unicode	12 GB
Oracle Unicode	12 GB

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

Note. For HP-UX, verify that your environment variable LC_ALL contains the following setting:

american.iso88591

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Task 1-2-3: Installing Application Files to the Custom PS_APP_HOME Location

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

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

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

See Oracle's PeopleSoft PeopleTools 8.52 Release Notes.

See PeopleTools 8.52 Installation for your database platform.

See *PeopleTools 8.52: System and Server Administration PeopleBook.*

Note. For the purposes of this installation document, use the reference <PS_APP_HOME> as the location where the application files will reside. If you are not implementing the split location, then this variable will be equal to <PS_HOME>.

Task 1-2-4: Creating and Configuring a Search Collection on UNIX

To enable users to search records and documents in your PeopleSoft CRM applications:

1. Create a collection in your database.

   A collection is a set of special directories and files that the search engine uses to find and display source documents that match the criteria that users enter on the search page.

2. Configure UNIX servers to locate the PeopleSoft CRM search collection.

   You do this by linking the UNIX utilities *sh* and *chmod* into the <*PS_HOME*> directory of each process scheduler server by entering the following commands:

```
ln -s /bin/chmod $PS_HOME/chmod
ln -s /bin/sh $PS_HOME/sh
```

Task 1-2-5: Installing Multilingual File References and Maintenance Log Data

The steps should be run only if the multilingual media pack has been installed.

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

1. Sign on with PeopleSoft Data Mover to the CRM 9.1 application database.
2. Open the PeopleSoft Data Mover script: <*PS_APP_HOME*>\scripts\multilingual_data_i.dms.
3. Run this script against the CRM 9.1 application database.

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4. Close PeopleSoft Data Mover.

Task 1-2-6: Reviewing SWPAUDIT Results

This step only applies if the multilingual media pack has been installed and if you plan to swap your base language and run SWPAUDIT. The following SWPAUDIT exception is expected and can be ignored:

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

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

Task 1-3: Setting Up the PeopleSoft CRM Database

This section discusses:

- Loading Active Analytics Framework Data

Task 1-3-1: Loading Active Analytics Framework Data

To load Active Analytics Framework (AAF) data into the PeopleSoft CRM 9.1 databases:

1. Use your user ID and password to connect to the PeopleSoft CRM 9.1 database using PeopleSoft Data Mover (psdmt.exe).
2. Run the PeopleSoft Data Mover script `CRM_AAF_IMPORT.DMS`, found in the %*PS_APP_HOME*%\scripts directory, against the system (SYS) database.

   This script loads the definitions for all of the PeopleSoft AAF objects (such as terms, policies, contexts, action types, and trigger points) into the PeopleSoft CRM database.

Note. Oracle provides translations of all end-user objects on the "Global Multi-Language" CD, including the PeopleSoft Data Mover scripts and .dat files referenced here. For PeopleSoft AAF data, Oracle delivers a .dat file equivalent to `eocf_crm_sysdata.dat` for each language. The file names are eocf_crm_sysdata_*xxx*.dat, where *xxx* denotes the language code. Run `crm_aaf_import_xxx.dms` to import this data.

Task 1-4: Configuring an FTP Server for Storing Attachments

PeopleSoft CRM applications enable you to add notes and attach supporting files to many objects. The system physically stores the file attachments on an FTP server. In this task, you specify the application URLs that the system uses to save and retrieve the file attachments.

To set the URLs for file attachments:

1. Set up an FTP server to store the attachments.

   There are no special requirements; any standard FTP server is sufficient.
2. Log in to PeopleSoft using a user ID that gives you access to the PeopleSoft PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.

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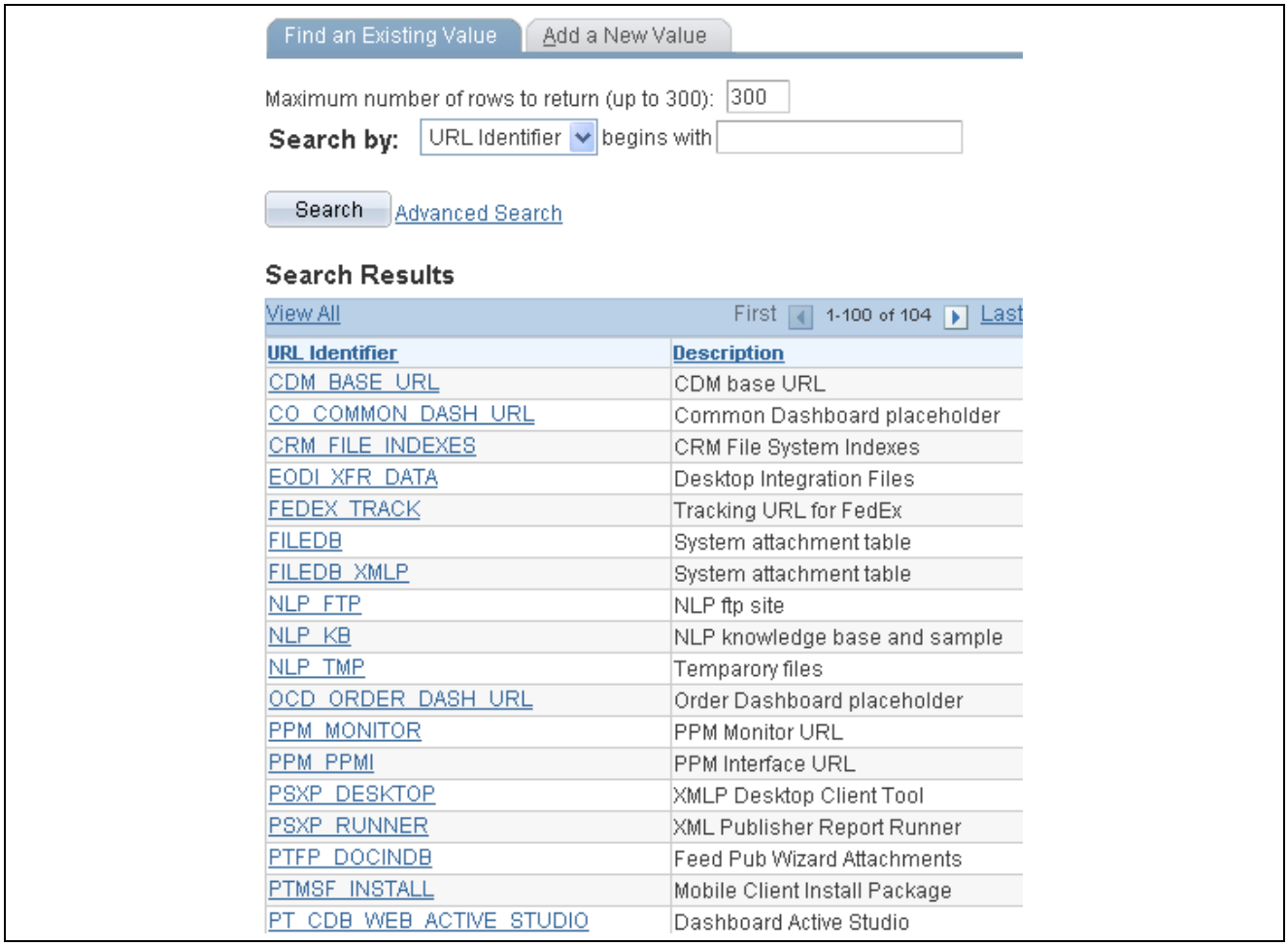
The URL Maintenance search page appears.

4. Click the Search button to display and select from a list of URL Identifiers.

   The database includes predefined URL identifiers. Each of these identifiers represents a particular type of attachment that is available in PeopleSoft CRM. The description indicates which PeopleSoft CRM product each identifier relates to, as shown in the following example:



URL Maintenance Search page

Note. The URL Identifier RF_FDM_LINKS is not related to attachments. The system uses this URL identifier in certain integration scenarios between PeopleSoft CRM and PeopleSoft Supply Chain Management.

See *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Integrating with PeopleSoft Applications."

5. For each attachment type that you plan to use, do the following:

   a. Select the URL identifier.

   b. Enter the FTP server URL that the application uses to access this attachment type, as shown in the following example:

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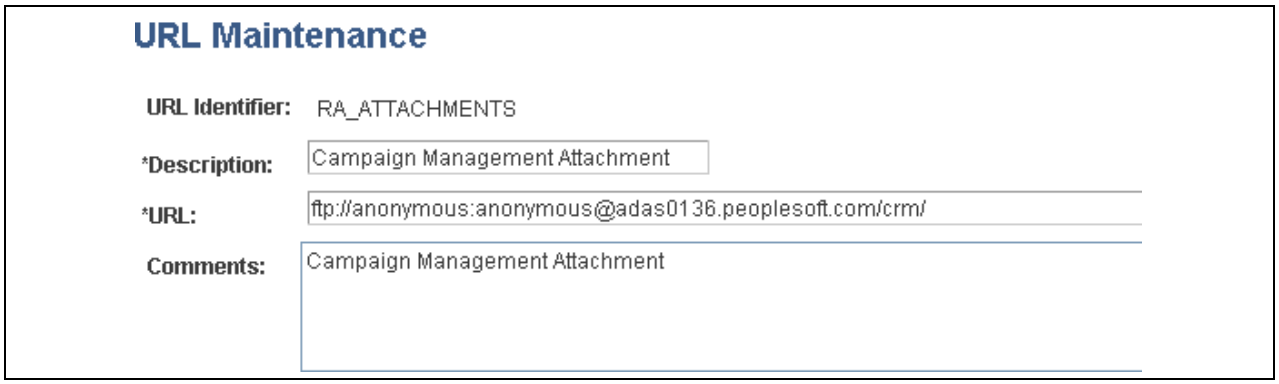

URL Maintenance page - URL Identifier: RA_ATTACHMENTS page

c. Click Save.

See *PeopleSoft PeopleTools 8.52 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities."

Task 1-5: Setting Start Values for Auto-Numbered Fields

Set the starting value for objects that use the Last Number Setup page (instead of the Auto-numbering page) to generate auto-numbered IDs.

To set the start value for auto-numbering:

1. Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers.

   The Last Numbers Setup page appears.

2. On the Last Number Setup page, click the Refresh All Last Numbers button, as shown in the following example.

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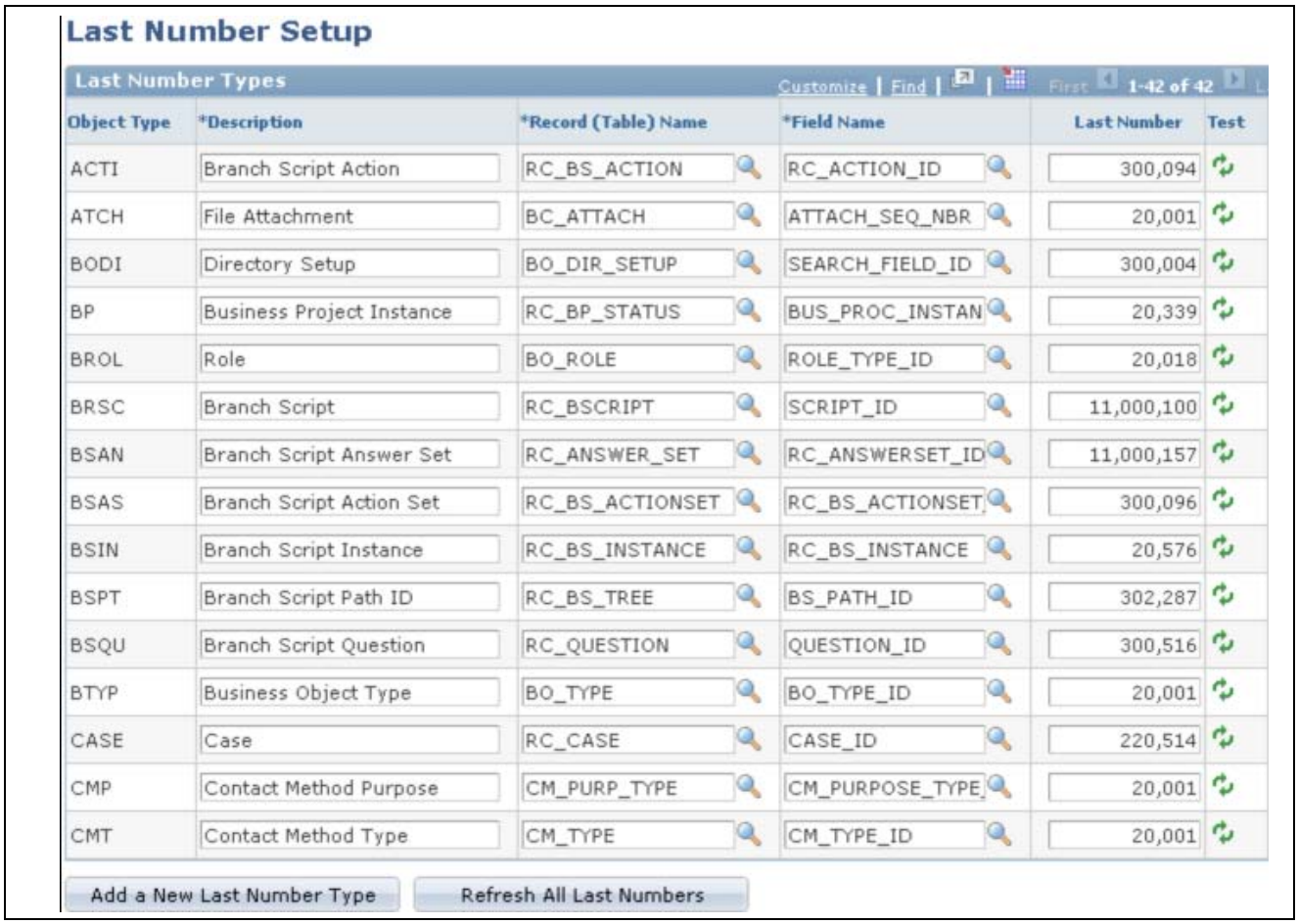


Last Number Setup

Last Number Types — Customize | Find | First 1-42 of 42

Object Type	*Description	*Record (Table) Name	*Field Name	Last Number	Test
ACTI	Branch Script Action	RC_BS_ACTION	RC_ACTION_ID	300,094	
ATCH	File Attachment	BC_ATTACH	ATTACH_SEQ_NBR	20,001	
BODI	Directory Setup	BO_DIR_SETUP	SEARCH_FIELD_ID	300,004	
BP	Business Project Instance	RC_BP_STATUS	BUS_PROC_INSTAN	20,339	
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018	
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,100	
BSAN	Branch Script Answer Set	RC_ANSWER_SET	RC_ANSWERSET_ID	11,000,157	
BSAS	Branch Script Action Set	RC_BS_ACTIONSET	RC_BS_ACTIONSET	300,096	
BSIN	Branch Script Instance	RC_BS_INSTANCE	RC_BS_INSTANCE	20,576	
BSPT	Branch Script Path ID	RC_BS_TREE	BS_PATH_ID	302,287	
BSQU	Branch Script Question	RC_QUESTION	QUESTION_ID	300,516	
BTYP	Business Object Type	BO_TYPE	BO_TYPE_ID	20,001	
CASE	Case	RC_CASE	CASE_ID	220,514	
CMP	Contact Method Purpose	CM_PURP_TYPE	CM_PURPOSE_TYPE	20,001	
CMT	Contact Method Type	CM_TYPE	CM_TYPE_ID	20,001	

Add a New Last Number Type | Refresh All Last Numbers

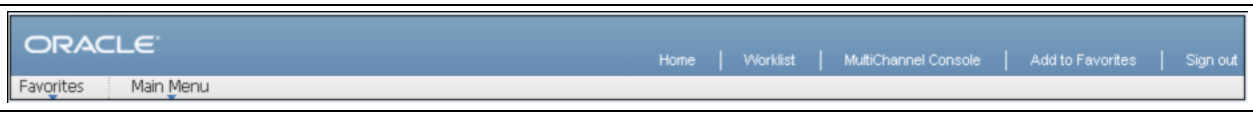
Last Number Setup page

You can modify the values later using the Last Number Setup page.

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting General Options."

Task 1-6: Configuring Computer Telephony Integration

PeopleSoft PeopleTools provides a MultiChannel Console header link to enable Computer Telephony Integration (CTI). You must set up the user as a CTI agent to make this MultiChannel Console link visible, as shown in the following example:



Oracle panel with the MultiChannel Console header link

See *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Configuring CTI Application Pages."

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Task 1-7: Activating Basic Data Summary and Messaging

The PeopleSoft CRM system delivers the messaging mechanism and basic data summary inactive. You must activate the messaging mechanism and basic data summary to enable PeopleSoft Online Marketing (OLM) basic profile population.

Note. This task is a requirement if you are installing PeopleSoft Marketing or PeopleSoft OLM applications.

See "Installing PeopleSoft Online Marketing 9.1."

Task 1-8: Setting Up the PeopleSoft Integration Broker

This section discusses:

- Configuring the Gateway URL
- Setting Up the Service Configuration for Web Services
- Activating the PeopleSoft Integration Broker Domain
- Setting Default User IDs on Internal PeopleSoft Integration Broker Nodes

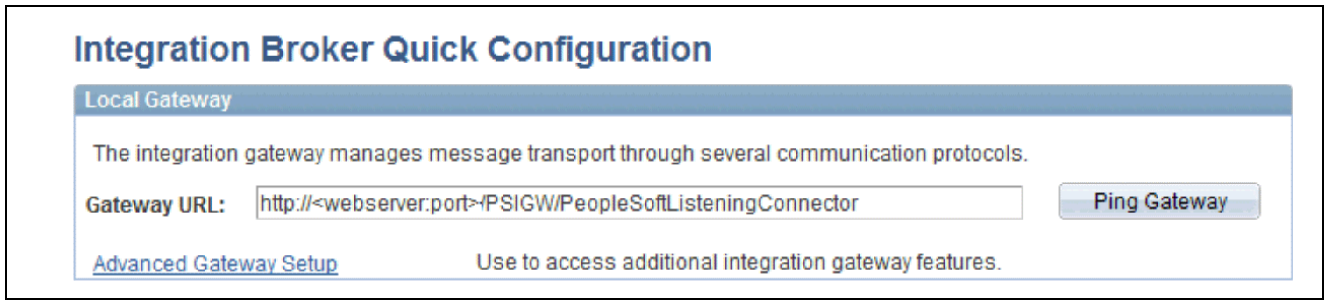
Perform the tasks in this section to enable the publishing and receiving of messaging and web services between the PeopleSoft CRM system and other PeopleSoft modules and integration partners.

Task 1-8-1: Configuring the Gateway URL

To configure the PeopleSoft Gateway URL:

1. Log in to PeopleSoft Pure Internet Architecture and select PeopleTools, Integration Broker, Configuration, Quick Configuration.

   The Integration Broker Quick Configuration page appears, as shown in the following example:



Integration Broker Quick Configuration page

2. Complete the URL by replacing the <*webserver:port*> tokens with your Gateway webserver name and port.
3. Click Save. When you see the message “The Gateway URL has changed. Connector information will be refreshed.”, click OK.
4. Click Ping gateway. The PeopleSoft Integration Gateway page should appear in a new browser window, as shown in the example that follows. Close the window.

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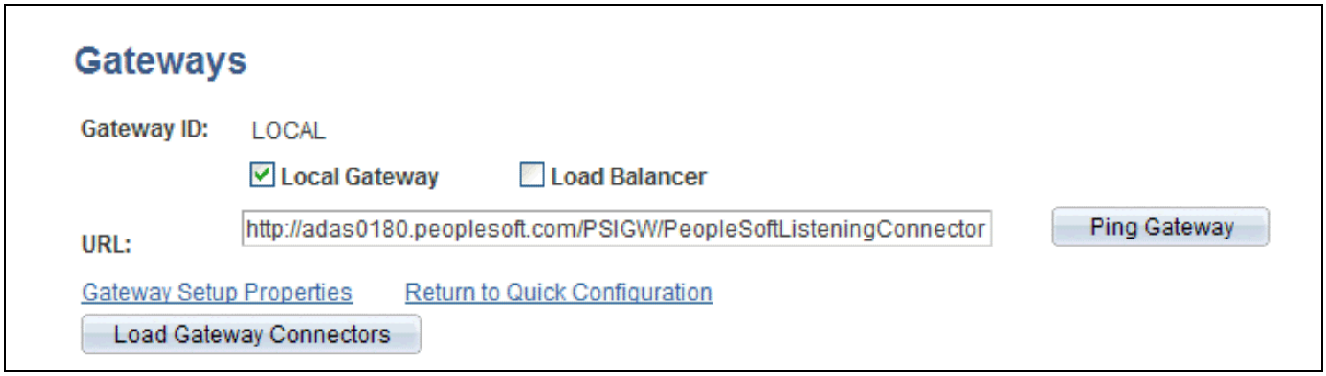
PeopleSoft Listening Connector page

5. Click the Advanced Gateway Setup link to open the Gateways page, as shown in the following example:



Gateways page

6. On the Gateways page, click the Gateway Setup Properties link. The system prompts you to enter a User ID and Password. In the User ID field, enter *administrator*, and in the Password field, enter *password*.

   The PeopleSoft Node Configuration page appears.

7. On the PeopleSoft Node Configuration page, do the following:
   a. In the Gateway Default App. server group box, in the App Server URL field, enter your application server name and port.
   b. In the User ID and Password fields, enter the SuperUser for your system (typically *PS/PS* or *VP1/VP1*).
   c. In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.

      For example, *8.52.03*.

8. In the PeopleSoft Nodes group box, specify the local node name (PSFT_CR), as shown in the following example:

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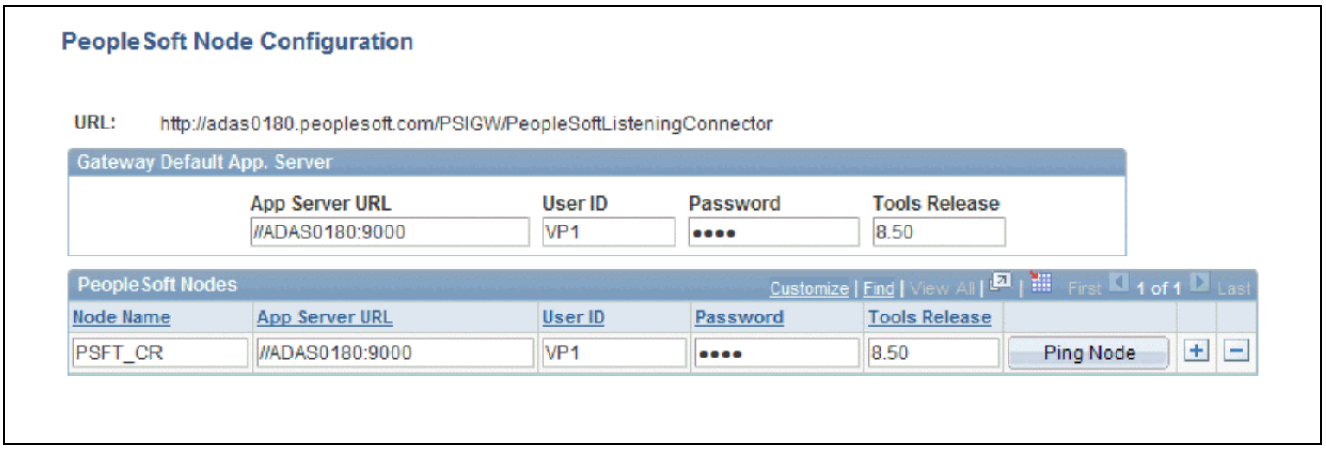
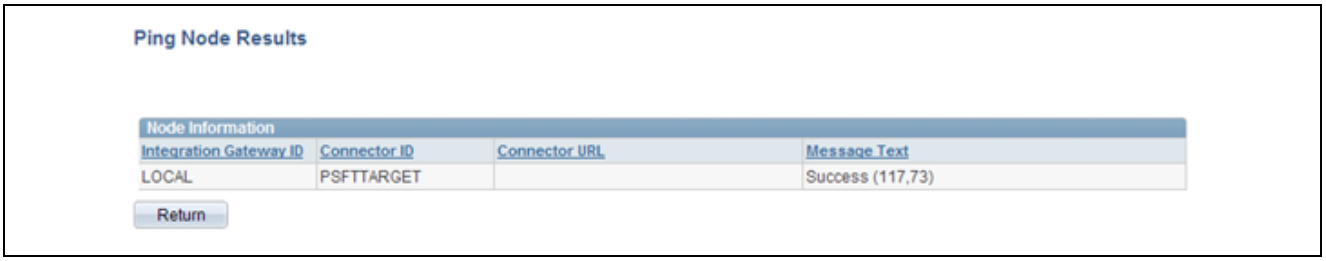


PeopleSoft Node Configuration page

9. Follow the instructions in step 7 to configure the remaining fields for the local node, and then click Save.
10. Click the Ping Node button on the Local Node to verify that it returns a response of *Success*, as shown in the following example:



Ping Node Results page

11. Verify that the *SecureFileKeyStorePasswd* is correct and encrypted as follows:
    a. Log in to PeopleSoft Pure Internet Architecture. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.
    b. Click the Advanced Gateway Setup link on the Integration Broker Quick Configuration page to access the Gateways page.
    c. Click the Gateway Setup properties link and log in.
    d. Click the Advanced Properties Page link.

       The Gateway Properties page appears.
    e. Use the Password Encryption Utility to encrypt the password.
    f. On the Gateway Properties page, edit the following lines to update the *secureFileKeystorePasswd* with your integration gateway properties password information:

       The default value is *password*.

```
#secureFileKeystorePath=<fileLocation>
#secureFileKeystorePasswd=<password>
#change your ps_home directory
secureFileKeystorePath= ps_home/webserv/peoplesoft/keystore/pskey
secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==
```

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Where {V1.1}7m4OtVwXFNyLc1j6pZG69Q== is password encrypted. If you are not using the default value password, your encrypted value will be different.

g. Click OK.

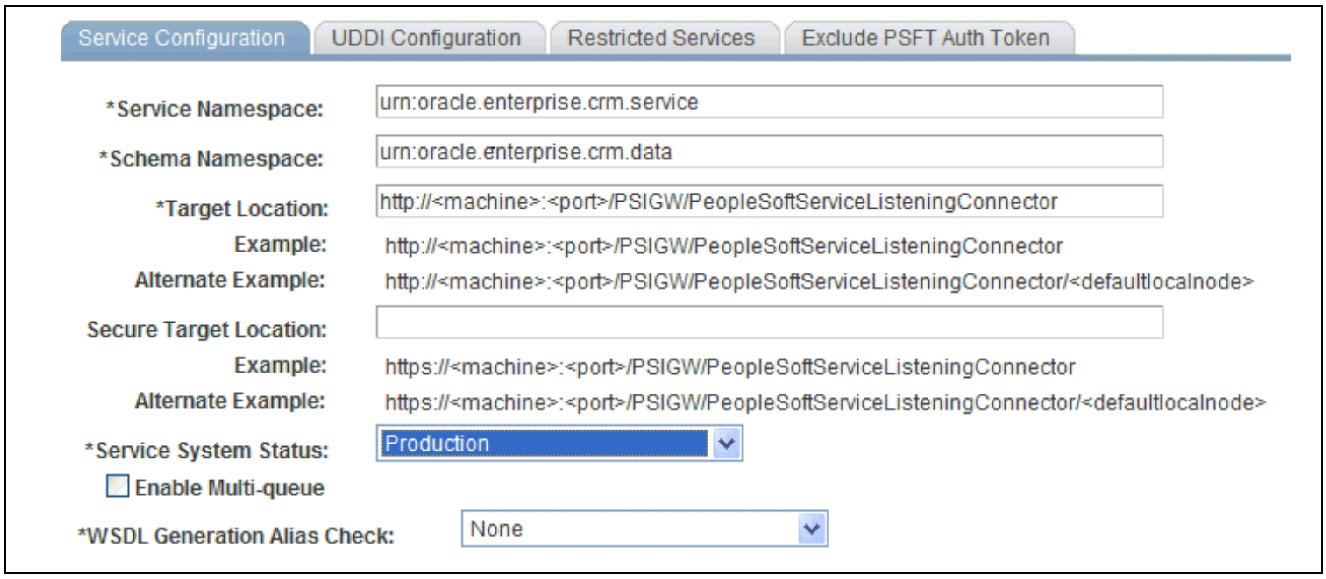
h. Click Save.

Task 1-8-2: Setting Up the Service Configuration for Web Services

To set up the service configuration for web services:

1. Select PeopleTools, Integration Broker, Configuration, Quick Configuration, and then click the Service Configuration link.

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



Service Configuration page

2. In the Service Namespace field, enter *urn:oracle.enterprise.crm.service*.
3. In the Schema Namespace field, enter *urn:oracle.enterprise.crm.data*.
4. Complete the Target Location URL, as shown in the previous example, by replacing the <*machine:port*> tokens with your Gateway name and port.

   If the system prompts you to update UDDI servers, click Yes.
5. Click Save.

Task 1-8-3: Activating the PeopleSoft Integration Broker Domain

To activate the PeopleSoft Integration Broker domain:

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

   Click the Domain Status link to access the Domain Status page.
2. Verify that a PeopleSoft PeopleTools 8.52 Domain is available and that the Domain Status field is set to *Active*.

   If *Inactive*, select *Active* from the Status drop-down list box, as shown in the following example:

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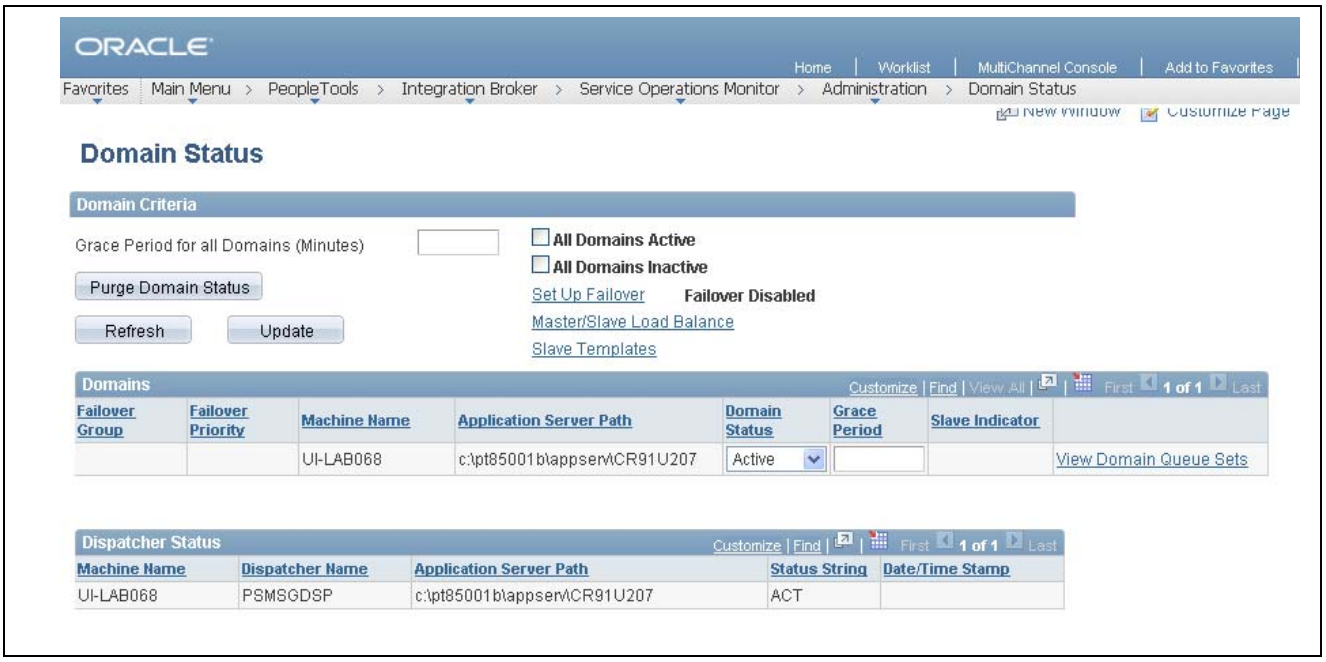

Domain Status page

3. Click Save.

Task 1-8-4: Setting Default User IDs on Internal PeopleSoft Integration Broker Nodes

The PeopleSoft system uses the default user ID on the internal PeopleSoft Integration Broker nodes to determine the level of security access to inbound service requests that the PeopleSoft Integration Broker receives. If an inbound service requests attempts to access a service operation or component interface for which the default user ID does not have privileges, the system denies the service request

---

Note. It is important that the default user ID has security privileges to all web services that you plan to use. One way to easily accomplish this is to select a default user ID with *AllPages* and *All Webservices* access, otherwise known as a *SuperUser*. Typical examples are *PS*/*PS* or *VP1*/*VP1*.

To set default user IDs:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the *ANONYMOUS* node. Update the Default User ID field to a valid user ID that has the appropriate level of security privileges.
3. Click Save.
4. Search for and open the *PSFT_WEB_SERVICE* node. Update the Default User ID field to a valid user ID that has the appropriate level of security privileges.
5. Click Save.
6. Restart your web server and application server and clear the cache.

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Task 1-9: Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture

This section discusses:

- Setting Up and Configuring the Webserver
- Modifying the Proxy Server Setting in the setEnv File
- Updating Gateway Properties
- Defining Installation Options
- Setting Up the Cybersource PSFT_CYB Node
- Testing Connectivity

Perform the tasks in this section to set up and test connectivity with Cybersource using PeopleSoft Integration Broker SOAP messaging for authorizations.

Task 1-9-1: Setting Up and Configuring the Webserver

Understanding Setting Up and Configuring the Webserver

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture:

Copy the SSL certificate that Cybersource provides with their service and paste it into the webserver Keystore directory. The procedure for doing this varies, depending on whether you are using Oracle WebLogic or IBM WebSphere, and where your webserver is running – Microsoft Windows or UNIX. Choose the appropriate section from the following:

Setting Up an Oracle WebLogic Server on Microsoft Windows

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an Oracle WebLogic webserver on Microsoft Windows:

1. Copy the SSL certificate to the webserver keystore directory.

   The keystore directory is in: <*PS_CFG_HOME*>\webserv\<*DOMAIN_NAME*>\keystore
2. Open a CMD (command) prompt and navigate to the keystore directory.
3. Enter this command:

   ```
   <PS_HOME>\jre\bin\keytool -keystore pskey -import -alias entrust_ssl_ca -file
   <PS_CFG_HOME>\webserv\<DOMAIN_NAME>\keystore\entrust_ssl_ca.cer
   ```

4. When the system prompts you for the keystore password, enter *password.*
5. Enter *yes* to trust the certificate.

Setting Up an Oracle WebLogic Server on UNIX

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an Oracle WebLogic webserver on UNIX:

1. Copy the SSL Certificate to the webserver keystore directory.

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The keystore directory is in: <*PS_CFG_HOME*>/webserv/<*DOMAIN_NAME*>/keystore

2. From a UNIX prompt, navigate to the keystore directory.
3. Enter this command:

```
<PS_HOME>/jre/bin/keytool -keystore pskey -import -alias entrust_ssl_ca -file
<PS_CFG_HOME>/webserv/<DOMAIN_NAME>/keystore/entrust_ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password.*
5. Enter *yes* to trust the certificate.

Setting Up an IBM WebSphere Server on Microsoft Windows

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an IBM WebSphere webserver on Microsoft Windows:

1. Copy the SSL certificate to the webserver keystore directory.

   The keystore directory is in:

```
<PS_CFG_HOME>\webserv\<DOMAIN_NAME>\installedApps\<DOMAIN_NAME>NodeCell\<DOMAIN_⇒
NAME>.ear\keystore
```

2. Open a CMD (command) prompt and navigate to the keystore directory.
3. Enter this command:

```
<PS_HOME>\jre\bin\keytool -keystore pskey -import -alias entrust_ssl_ca -file⇒
 <PS_CFG_HOME>\webserv\<DOMAIN_NAME>\installedApps\<DOMAIN_NAME>NodeCell⇒
\<DOMAIN_NAME>.ear\keystore\entrust_ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password.*
5. Enter *yes* to trust the certificate.

Setting Up an IBM WebSphere Server on UNIX

To set up the webserver for Cybersource SOAP connectivity for PeopleSoft Pure Internet Architecture if you are running an IBM WebSphere webserver on UNIX:

1. Copy the SSL certificate to the webserver keystore directory.

   The keystore directory is in:

```
<PS_CFG_HOME>/webserv/<DOMAIN_NAME>/installedApps/<DOMAIN_NAME>NodeCell/<DOMAIN_
NAME>.ear/keystore
```

2. From a UNIX prompt, navigate to the <*DOMAIN_NAME*>.ear directory in:

```
<PS_CFG_HOME>/webserv/<DOMAIN_NAME>/installedApps/<DOMAIN_NAME>NodeCell/<DOMAIN_
NAME>.ear
```

3. Enter this command:

```
pskeymanager.sh -import -alias entrust_ssl_ca -file <PS_CFG_HOME>/webserv⇒
/<DOMAIN_NAME>/instaledApps/<DOMAIN_NAME>NodeCell/<DOMAIN_NAME>.ear
/keystore/entrust_ssl_ca.cer
```

4. When the system prompts you for the keystore password, enter *password.*

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5. Enter *yes* to trust the certificate.

Task 1-9-2: Modifying the Proxy Server Setting in the setEnv File

This section discusses:

- Configuring setEnv.cmd on Microsoft Windows for Oracle WebLogic or IBM WebSphere
- Configuring setEnv.sh on UNIX for Oracle WebLogic or IBM WebSphere

Configuring setEnv.cmd on Microsoft Windows for Oracle WebLogic or IBM WebSphere

To configure *setEnv.cmd* on Microsoft Windows for Oracle WebLogic or IBM WebSphere:

If you are running the installation behind a proxy server, modify the following proxy server settings in the *setEnv.cmd* file that can be found in:

For Oracle WebLogic: <*PS_CFG_HOME*>\webserv\<*DOMAIN_NAME*>\bin

For IBM WebSphere: <*PS_CFG_HOME*>\webserv\<*DOMAIN_NAME*>\installedApps\<*DOMAIN_ NAME*>NodeCell\<*DOMAIN_ NAME*>.ear

```
SET ENABLE_HTTP_PROXY=true

SET HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>

SET HTTP_PROXY_HTTPPORT=<PROXY_PORT>

SET HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>

SET HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

Configuring setEnv.sh on UNIX for Oracle WebLogic or IBM WebSphere

To configure the IBM WebSphere webserver *setenv.cmd* on Microsoft Windows and *setenv.sh* file on UNIX:

If you plan to run the installation behind a proxy server, modify the following proxy server settings in the *setEnv.sh* file that can be found in:

For Oracle WebLogic: <*PS_CFG_HOME*>/webserv/<*DOMAIN_NAME*>/bin

For IBM WebSphere: <*PS_CFG_HOME*>/webserv/<*DOMAIN_NAME*>/installedApps/<*DOMAIN_ NAME*>NodeCell/<*DOMAIN_ NAME*>.ear

```
export ENABLE_HTTP_PROXY=true

export HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>

export HTTP_PROXY_HTTPPORT=<PROXY_PORT>

export HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>

export HTTP_PROXY_HTTPPORT=<PROXY_PORT>
```

Task 1-9-3: Updating Gateway Properties

Add proxy settings and ensure that the *SecureFileKeyStorePasswd* is correct and encrypted.

To update gateway properties:

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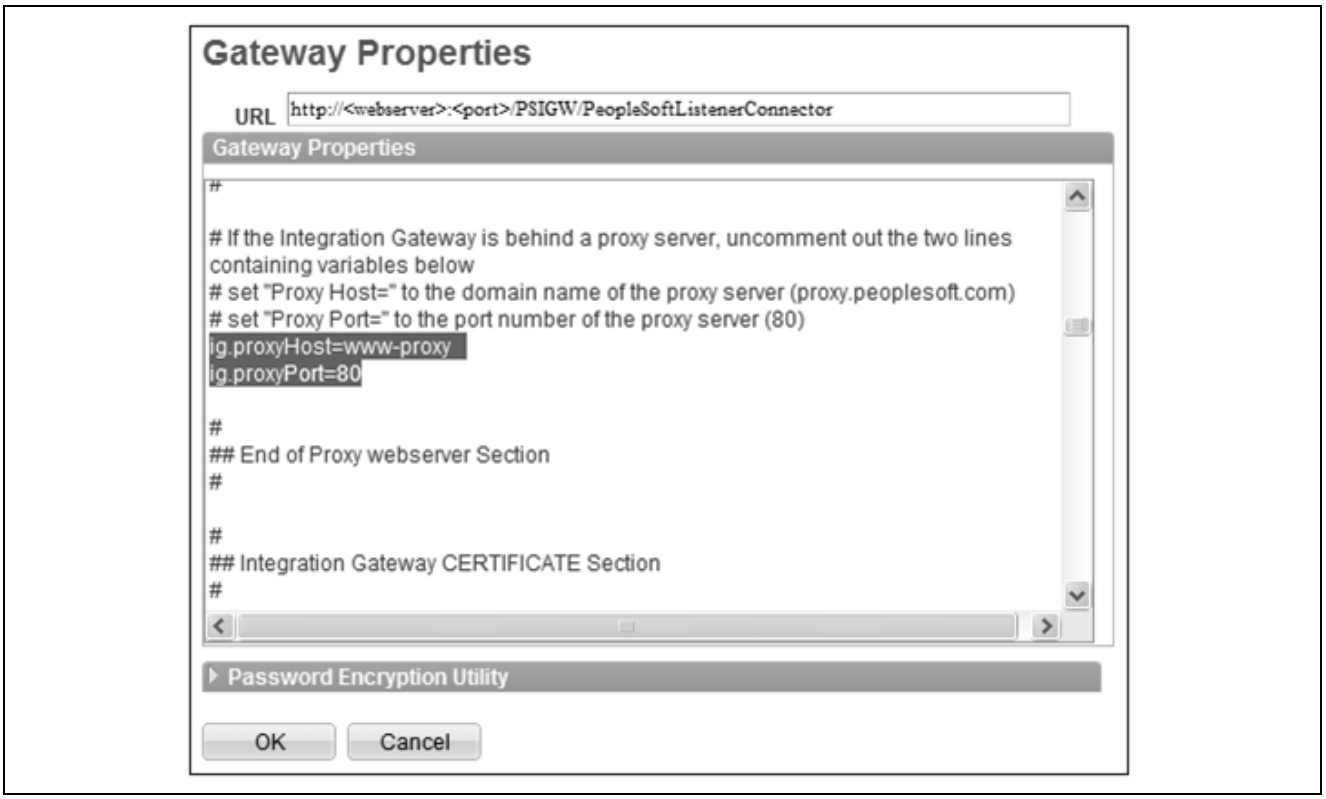
1. Log in to PeopleSoft Internet Pure Architecture. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.
2. Click the Advanced Gateway Setup link on the Integration Broker Quick Configuration page to access the Gateways page.
3. Click the Gateway Setup properties link and log in.
4. Click the Advanced Properties Page link.

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



Gateway Properties page

5. If you are running the installation behind a proxy server, on the Gateway Properties page, edit the following lines by entering your proxy servers and port information:

```
## Proxy webserver section
# If the Integration Gateway is behind a proxy server, uncomment out the two
 lines containing variables below

# set "Proxy Host=" to the domain name of the proxy server
(proxy.peoplesoft.com)

# set "Proxy Port=" to the port number of the proxy server (80)

ig.proxyHost=<YOUR_PROXY_SERVER>

ig.proxyPort=<PROXY_PORT>
```

6. Use the Password Encryption Utility to encrypt the password as follows:

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In the Gateway Properties page, edit the following lines to update the *secureFileKeystorePasswd* with your integration gateway properties password information:

The default value is *password.*

```
#secureFileKeystorePath=<fileLocation>
#secureFileKeystorePasswd=<password>
secureFileKeystorePath=ps_home/webserv/peoplesoft/keystore/pskey
secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==
```

Where {V1.1}7m4OtVwXFNyLc1j6pZG69Q== is password encrypted. If you are not using the default value password, your encrypted value will be different.

7. Click OK.
8. Click Save.

Task 1-9-4: Defining Installation Options

To define your Cybersource installation options:

1. Select Setup CRM, Install, Installation Options.

   The Installation Options page appears, as shown in the following example:

Example of Installation Options - Credit Card Options page

2. On the Installation Options Page, enter your Cybersource Merchant ID and Merchant Key.

   The system uses these credentials, as Cybersource provides with their service, to authenticate your account identity during authorizations.

   Go to www.Cybersource.com for details on creating and activating a service account. Also available are no charge evaluation accounts for preliminary testing.

Task 1-9-5: Setting Up the Cybersource PSFT_CYB Node

To set up the Cybersource PSFT_CYB node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Open the Cybersource additional component (third-party) node PSFT_CYB, and then select the Connectors tab to access the Connectors page, as shown in the following example:

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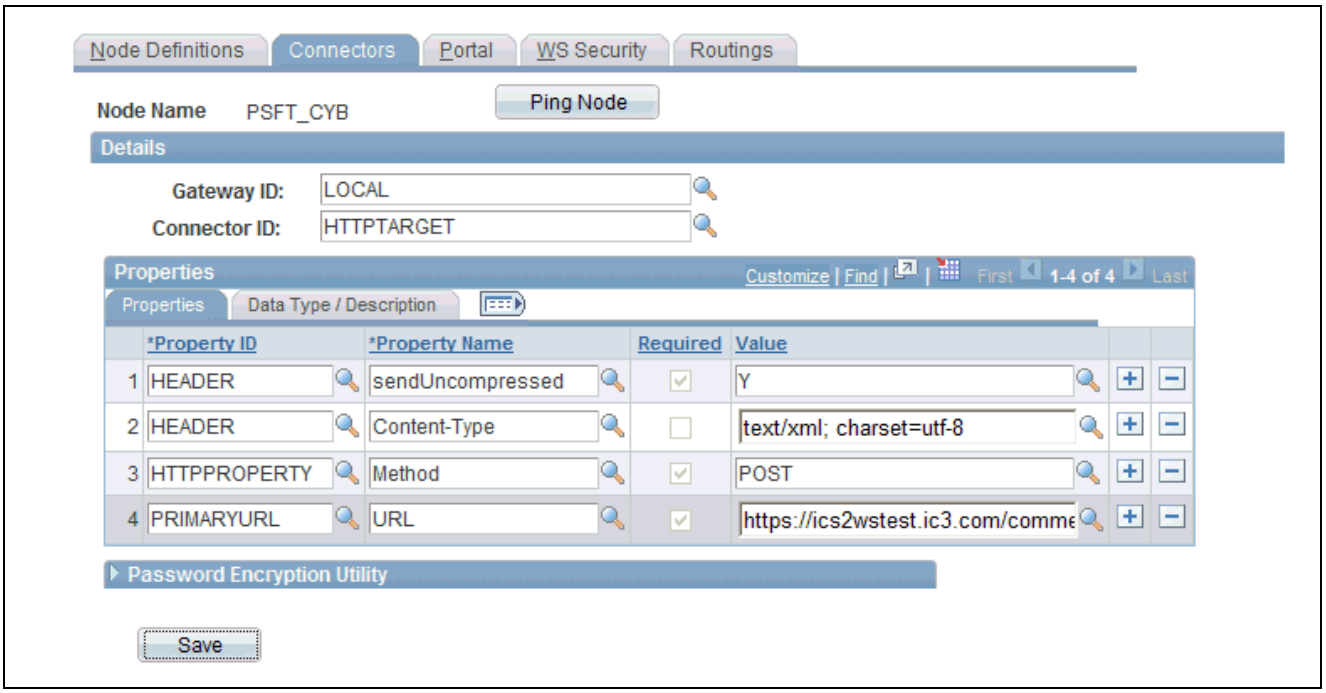

Connectors page

Enter the following values as shown in this example:

a. In the Gateway ID field, enter *Local.*

b. In the Connector ID field, enter *HTTPTARGET.*

c. In the Property ID field 1, enter *HEADER.*

d. In the Property Name field 1, enter *Content-Type.*

e. In the Property Value field 1, enter *text/xml; charset=utf-8.*

f. In the Property ID field 2, enter *HEADER.*

g. In the Property Name field 2, enter *sendUncompressed.*

h. In the Property Value field 2, enter *Y.*

i. In the Property ID field 3, enter *HTTPPROPERTY.*

j. In the Property Name field 3, enter *Method.*

k. In the Property Value field 3, enter *POST.*

l. In the Property ID field 4, enter *PRIMARYURL.*

m. In the Property Name field 4, enter *URL.*

n. In the Property Value field 4, enter: *https://ics2wstest.ic3.com/commerce/1.x/transactionProcessor.*

This is the Cybersource testing server URL. Your production server URL will be different. Both URLs are also available on the Cybersource website.

o. Click Save.

3. Click the Ping Node button.

If you do not receive a successful message, verify that your Proxy settings on the webserver are correct.

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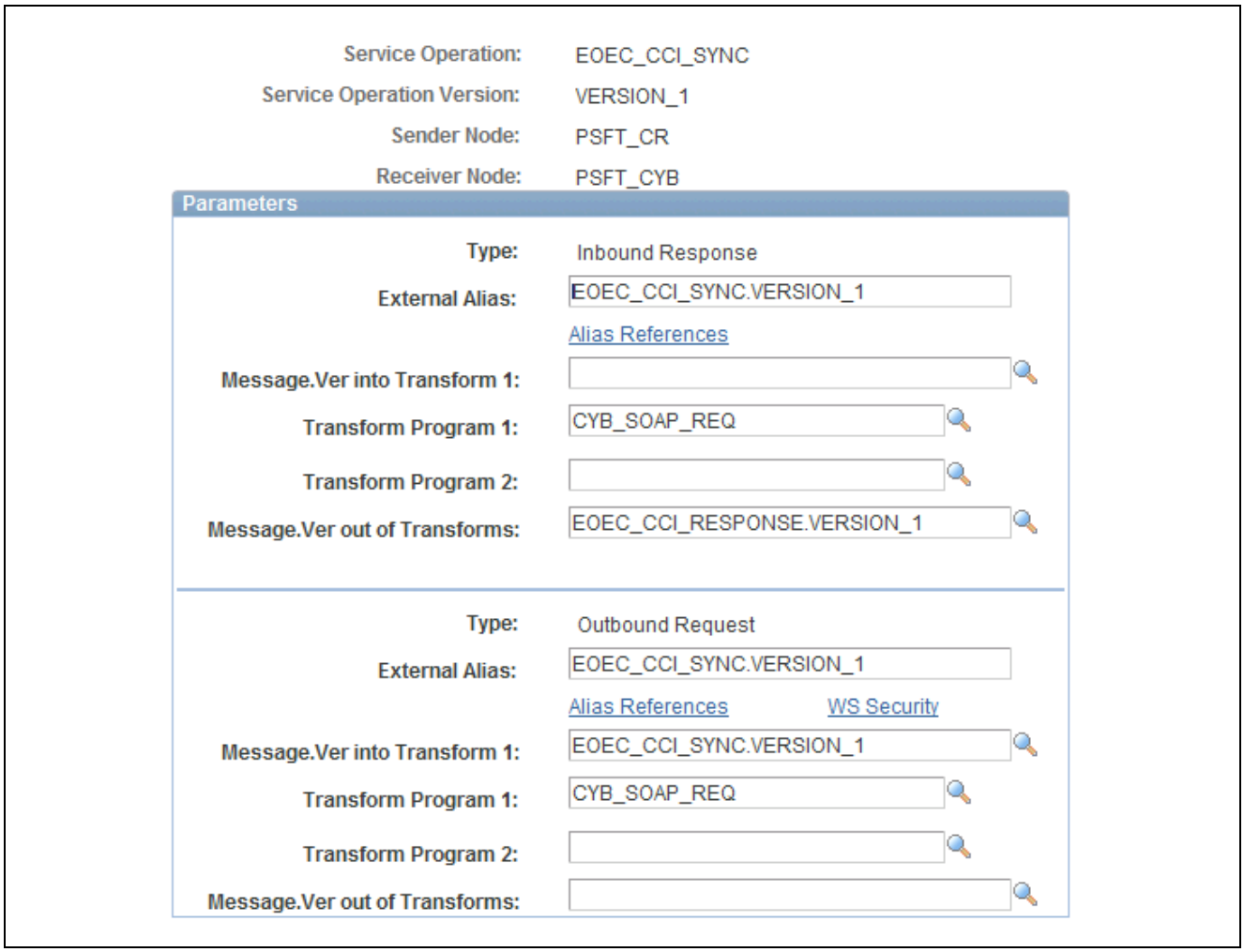
4. Select the Routings tab to access the Routings page and open the Routing Definition for CCI_TO_CYBERSOURCE, as shown in the following example:



Routings page

Verify that the Parameters group box is set up with the Transform programs as shown in this example.

5. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
6. Open the Service Operation Definition for EOEC_CCI_SYNC and ensure that the Active check box is selected.
7. Select the Routings tab to access the Routings page, as shown in the following example:

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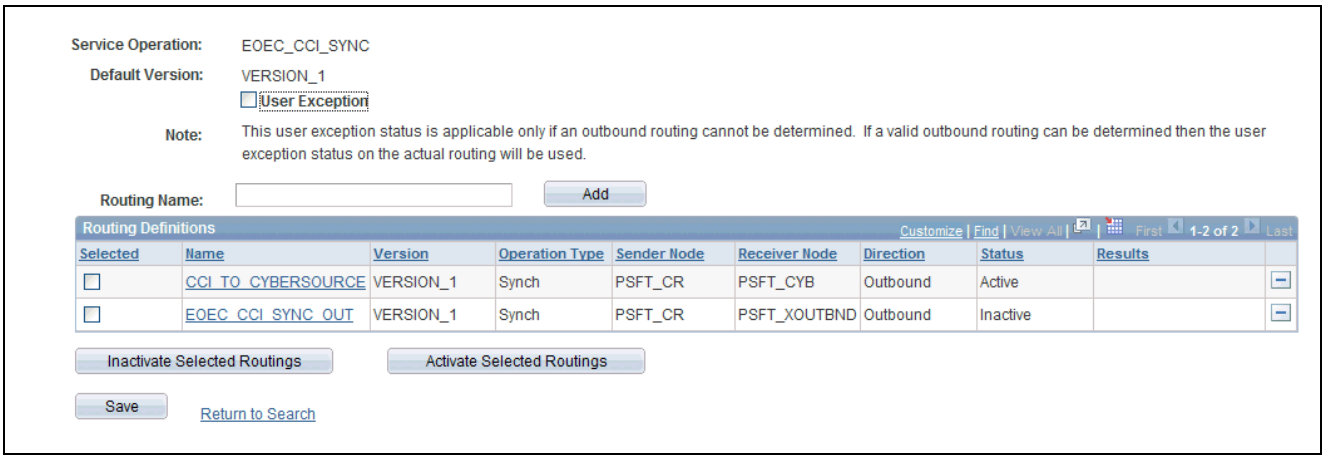

Routings page

8. Ensure that only the CCI_TO_CYBERSOURCE routing is set to a Status of *Active.*
9. Click the Handlers tab and ensure that the handler Status drop-down is set to *Active*.
10. Click Save.

Task 1-9-6: Testing Connectivity

To test Cybersource connectivity:

1. Select Enterprise Components, Component Configurations, Credit Card Interface, Test Credit Card Interface.
2. Click Add a New Value, and then click Add.
3. Click the Card Entry/Display tab to access the Credit Card Entry and Display Test page.
4. Enter the test values, as shown in the following example:

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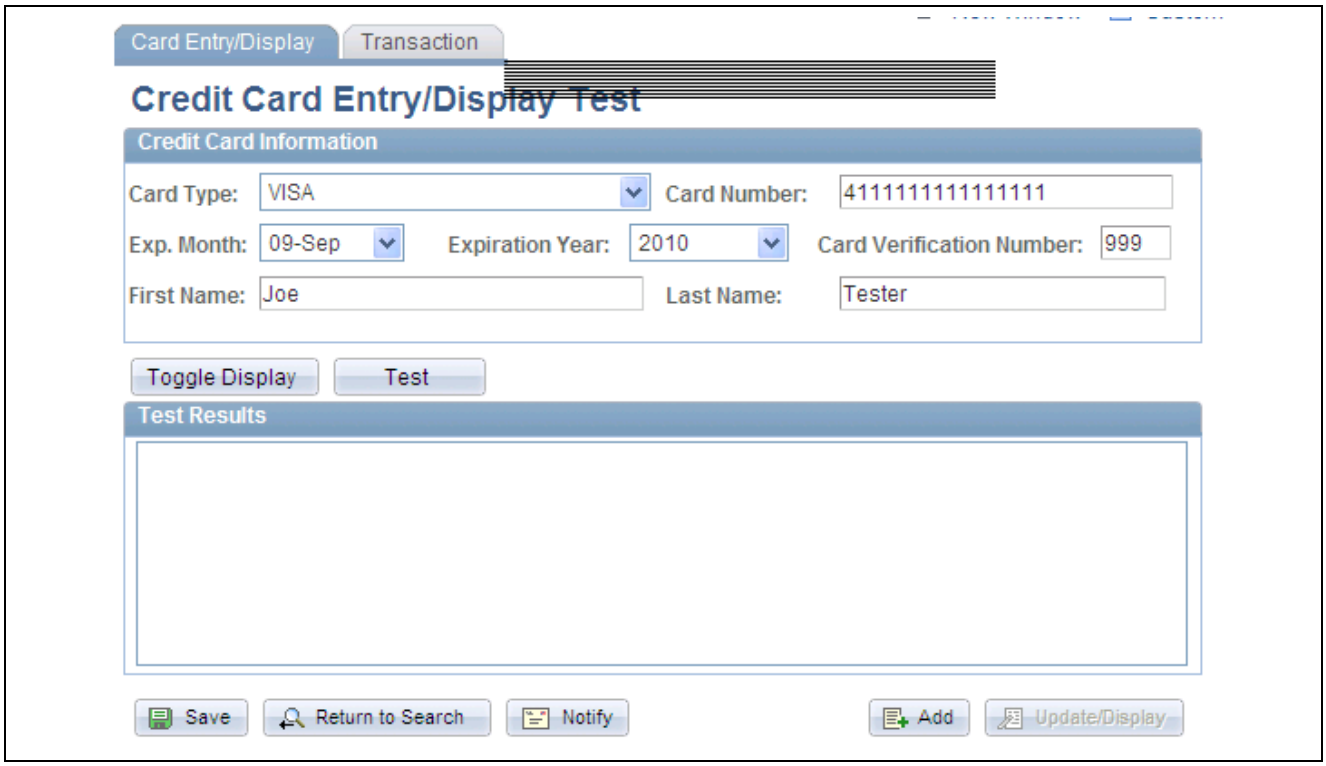

Credit Card Entry/Display Test page

- In the Card Type field, select *VISA* from the drop-down list box.
- In the Card Number field, enter *4111111111111111*.
- In the Exp. Month field, select *09–Sep* from the drop-down list box.
- In the Expiration Year field, select *2010* from the drop-down list box.
- In the Card Verification Number field, enter *999*.
- In the First Name field, enter *Joe*.
- In the Last Name field, enter *Tester*.

5. Select the Transaction tab to access the Transaction page, as shown in the following example:

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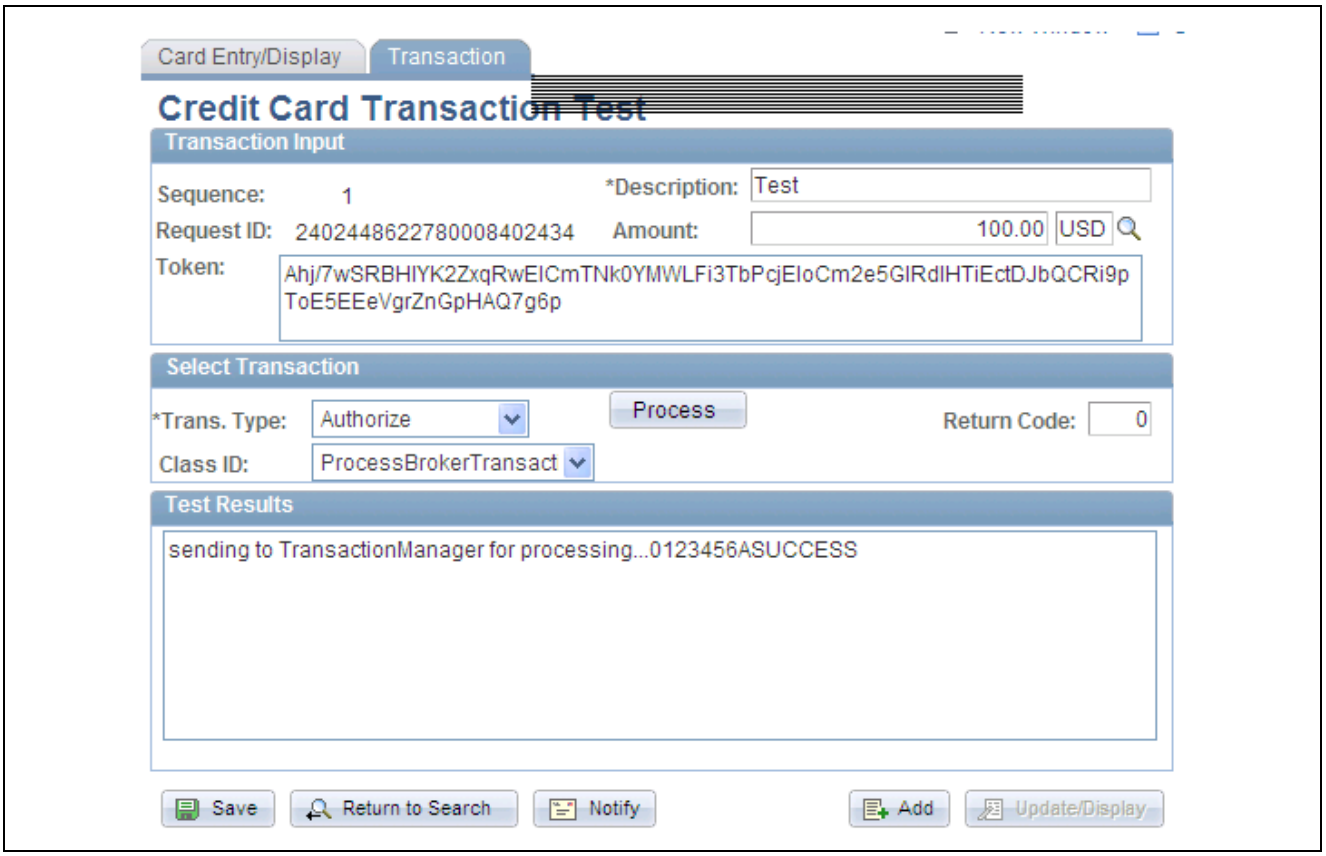

Transaction page

6. In the Description field, enter *Test*.
7. In the Amount field, enter *100.00*.
8. In the Currency field, enter *USD*.
9. In the Class ID field, select *ProcessBrokerTransaction* from the drop-down list box.
10. Click the Process button.

    The authorization result values appear in the Token and Test Results fields.

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CHAPTER 2

Installing PeopleSoft Correspondence Management

This chapter discusses:

- Understanding PeopleSoft Correspondence Management
- Identifying and Configuring FTP Servers
- Copying RTF and Text Template to the FTP Server
- Registering the FTP Servers
- Installing Additional Component Software — Xpdf
- Configuring User Selected Font for XMLP
- Reviewing PeopleSoft Correspondence Management
- Registering Microsoft Window Printers (Optional)
- Defining the CLASSPATH for Sun Java Mail Files

Understanding PeopleSoft Correspondence Management

This chapter provides instructions for installing the additional component applications required for PeopleSoft Correspondence Management functionality within Oracle's PeopleSoft CRM applications. Perform the following installation-related tasks to leverage these features provided by PeopleSoft Correspondence Management:

- The generation of Microsoft Word documents using templates.
- The conversion of Microsoft Word and text files into PDF documents.
- The printing of documents using network printers.

Note. Oracle recommends that you consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Correspondence Management."

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Task 2-1: Identifying and Configuring FTP Servers

The FTP servers are used to physically store correspondence templates and finished documents. These servers are used to store other PeopleSoft Correspondence Management-related documents as well, such as intermediary XML files created by the PeopleSoft Correspondence Management-specific processes.

You can store the templates and the generated documents either in a single FTP server or place them on separate FTP servers. You also have the option to place these files in different folders.

You can use the FTP server that is intended for storing PeopleSoft CRM attachments for storing correspondence-related documents. The number of documents, their size, and the file management, play a role in determining the need for having one or more FTP servers exclusively reserved for PeopleSoft Correspondence Management.

After identifying the server and the folders where the documents will be stored, the locations of these servers must be specified in the form of URLs.

The PeopleSoft Correspondence Management functionality works with five types of documents:

- Correspondence templates.
- Templates personalized by the agents for a specific correspondence request.
- Intermediary XML files created by PeopleSoft Correspondence Management-related processes.
- Merged documents.
- Attachments.

If all of these document types are stored under a single folder on a FTP server, you only have to create a single URL in the procedure that follows. If these documents are stored under different folders on either a single or multiple FTP servers, then you must create a URL for each of these unique locations.

To create the URLs to access PeopleSoft Correspondence Management related documents:

1. Set up one or more FTP servers to store the PeopleSoft Correspondence Management-related documents.

   Note. There are no special requirements—any standard FTP server will do.

2. Log in to PeopleSoft with a user ID that gives you access to the PeopleSoft PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.
4. For each unique location that you plan to use, create a URL identifier and enter the URL for the FTP server that the application will use to access this type of document.

   For example, the delivered RB_CORRMGT URL definition, as shown in the following example:

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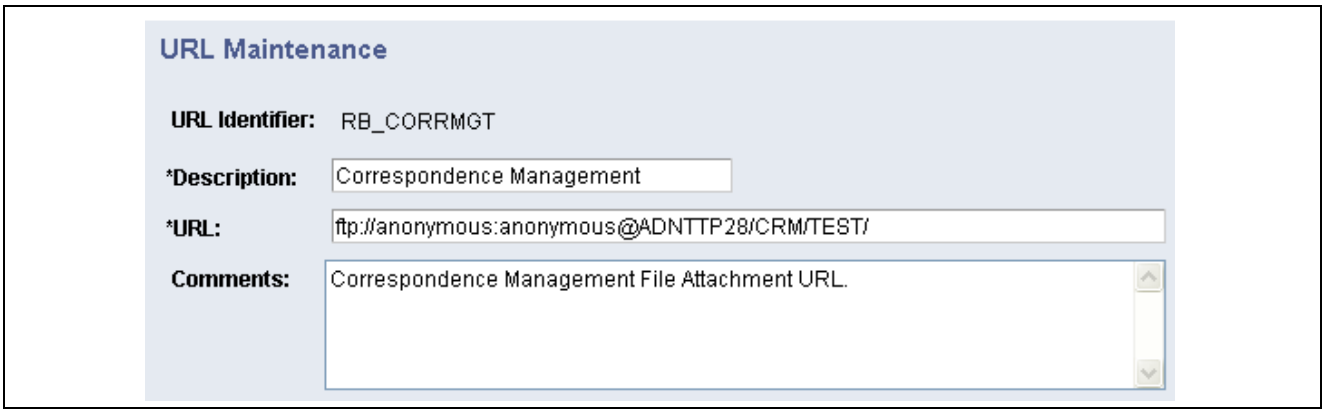

URL Maintenance page

See *PeopleSoft PeopleTools 8.52 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities."

Task 2-2: Copying RTF and Text Template to the FTP Server

New PeopleSoft Correspondence Management customers will need to upload templates that have associated *.rtf document files to the FTP server. To do this, you must upload the *.rtf file to the applicable template and save the template. This causes the PeopleSoft Correspondence Management system to upload the *.rtf file and the auto-generated *.xsl file to the FTP server defined in your RB_CORRMGT URL definition.

To upload templates to the FTP server:

1. Select Setup CRM, Common Definitions, Correspondence, Template.
2. Open an existing template.
3. Click the Replace button in the grid.
4. Select your *.rtf file.
5. Save the template.

Existing PeopleSoft Correspondence Management customers, if they have *.doc files associated with their templates, will need to replace their *.doc files with *.rtf files. In the new PeopleSoft Correspondence Management infrastructure, *.doc files and templates are not supported. All *.doc files must be converted to *.rtf files and uploaded to the FTP server.

To convert older *.doc files to *.rtf files:

Note. Perform this task only if you are upgrading from PeopleSoft CRM 8.9 to PeopleSoft CRM 9.1 or you have older formatted templates (.doc and .txt). PeopleSoft Correspondence Management only supports Rich Text (.rtf) and plain text (.txt) formatted templates. You can use Microsoft Word to open, convert, and then upload the new .rtf templates to the FTP server.

---

1. Using Microsoft Word, open each of your existing templates (*.doc files, these files may be found in $PS_CFG_HOME/appserv/CorrespondenceManagement/templates) and click the Replace button to re-save them as *.rtf files.

   You can keep the same name, just change the format of the file.

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2. After the *.rtf file is created, open the corresponding .rtf template, upload the *new* *.rtf file to the FTP server, and then delete the old *.doc file from the template grid.
3. Save the .rtf Template.

   This uploads the *.rtf file to the FTP server and auto-generates the associated *.xsl file.

Task 2-3: Registering the FTP Servers

This process allows the customer to specify which URL the PeopleSoft Correspondence Management system needs to access the various types of documents. URL identifiers can be assigned to the following categories:

- Template files
- Personalized templates
- Recipient XML
- Recipient document
- Attachment

To register the FTP server for the PeopleSoft Correspondence Management system:

1. Select PeopleTools, Utilities, Administration, URLs to define the URL.

   The system data for the URL is RB_CORRMGT. If required, modify the URL to point to your FTP.
2. Select Set Up CRM, Common Definitions, Correspondence, Install Options to configure the PeopleSoft Correspondence Management system installation.
3. Enter the values for the environment settings, as shown in the following example:

Environment Settings page

- In the Template File URL field, enter *RB_CORRMGT*.
- In the Personalized Templates URL field, enter *RB_CORRMGT*.
- In the Recipient XML URL field, enter *RB_CORRMGT*.
- In the Recipient Document URL field, enter *RB_CORRMGT*.
- In the Attachment URL field, enter *RB_CORRMGT*.

You can have unique values for each of the URL files. To do this, you must create more URL definitions to point to the different FTP servers. Then add those URL definitions as the values for each of the URL file fields.

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See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Defining Settings for Template-Based Correspondence."

Task 2-4: Installing Additional Component Software — Xpdf

Xpdf is free software obtained through the internet and is used for printing PeopleSoft Correspondence Management documents. You can reference either PeopleSoft PeopleBooks or the Foolabs official website for information on how to obtain this software.

When you have obtained the software, you can install it anywhere on the application server machine. You will update a configuration file to point to the Xpdf executable file. This configuration file is called *cm.properties* and is in: <*PS_APP_HOME*>\Appserv\CorrespondenceManagement\config\cm.properties

The following is an example of a PeopleSoft Correspondence Management configuration file that shows *cm.logFolder* and *pdf2ps.command* as the values of concern:

cm.properties *

```
################################################################################
# Correspondence Management Configuration File                                 #
################################################################################


########## Log4j Configuration - Start ##########

 cm.logFolder = d:/peopletools/cm/log/

 log4j.rootCategory=DEBUG, A2

 # Available levels are DEBUG, INFO, WARN, ERROR, FATAL

 log4j.appender.A2=org.apache.log4j.DailyRollingFileAppender

 log4j.appender.A2.datePattern='.'yyyy-MM-dd

 log4j.appender.A2.append=true

 log4j.appender.A2.layout=org.apache.log4j.PatternLayout

 log4j.appender.A2.layout.ConversionPattern=%-5p %d{ISO8601} [%c] - %m%n

########## Log4j Configuration - End ##########




########## PDF to PS Conversion Command - Start ##########

 pdf2ps.command = cmd /c d:/xpdf-3.00pl3-win32/pdftops.exe -paper match

########## PDF to PS Conversion Command - End ##########
```

PeopleSoft CM properties

- cm.logFolder

  Replace d:/pt<release number>/cm/log/ with the path of your choice to put all log files relating to PeopleSoft Correspondence Management runtime data. For each CM transaction, a log file is generated here with the CM id as the identifier.

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- pdf2ps.command

  Replace d:/xpdf-3.00pl3-win32/pdftops.exe with the path to your XPDF executable file that you just installed.

Note. You can install the XPDF software parser from the Foolabs official website.

Task 2-5: Configuring User Selected Font for XMLP

In this tasks, you will modify the <*PS_APP_HOME*>\appserv\CorrespondenceManagement\config\xdo.cfg

1. Remove these two lines:

   ```
   <!-- Font setting for convert OF to PDF
   -->
   ```

2. List all user desired fonts as the child node of <fonts>, as in the following example:

   ```
   <font family="Arial Narrow" style="normal" weight="normal">
         <truetype path="C:/WINDOWS/Fonts/ARIALN.TTF" />
        </font>
   ```

3. Replace the font ARIALN.TTF to user desired one.

   ```
   <config version="1.0.0" xmlns="http://xmlns.oracle.com/oxp/config/">
      <properties>
         <fonts>
        <font family="Arial Narrow" style="normal" weight="normal">
         <truetype path="C:/WINDOWS/Fonts/ARIALN.TTF" />
        </font>
        <font family="Garamond" style="normal" weight="normal">
         <truetype path="C:/WINDOWS/Fonts/GARA.ttf" />
        </font>
        </fonts>
   </properties>
   </config>
   ```

Task 2-6: Reviewing PeopleSoft Correspondence Management

There are two sections on the Install Options page (Setup CRM, Common Definitions, Correspondence, Install Options) that are relevant to functionality. These sections are populated by default and should not be changed. The sections are:

- Processing Library—This section defines the location to the Java files used for PeopleSoft Correspondence Management.

  These files are predelivered.

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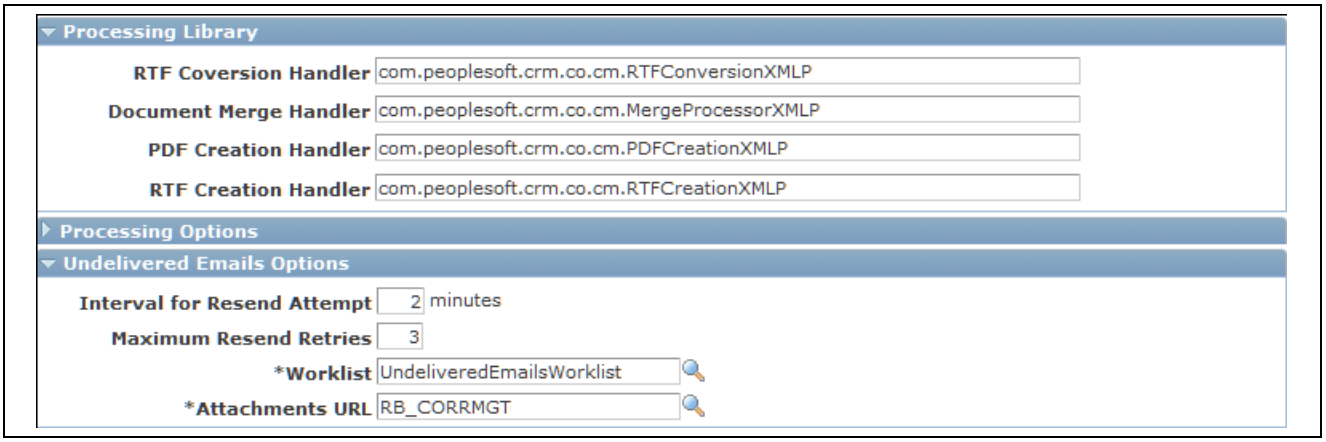
- Undelivered Emails Options—This section defines the work list used for emails that are undeliverable.

  When an email fails to be delivered, PeopleSoft Correspondence Management attempts to resend the email. If the next attempt fails, a notification is sent to the work list to notify the administrator that a problem exists that requires investigation.

  The following example shows the Processing Library page options defined with the predelivered files:



Processing Library page

Task 2-7: Registering Microsoft Window Printers (Optional)

This installation task is optional, but must be done if you want to print PeopleSoft Correspondence Documents.

By associating printers with your server definitions, you create a list of printers that are available for selection in the Create Correspondence page. The user's printer selection then determines where the delivery process runs.

To support printing in geographically dispersed locations, it is most efficient to define the Process Scheduler servers that run the Print Delivery job in each location, and then associate to the printers with the nearest Process Scheduler server. You can set up servers that are used only for the printing process.

Note. The association is between the printer and the Process Scheduler server control where the Print Delivery job runs. Therefore, the machine that the Process Scheduler server is on must have this printer driver installed.

To register printers:

1. Select Set Up CRM, Common Definitions, Correspondence, Printer Registration.
2. Specify the printer and any location information to inform users where to get the printed document, as shown in the following example:

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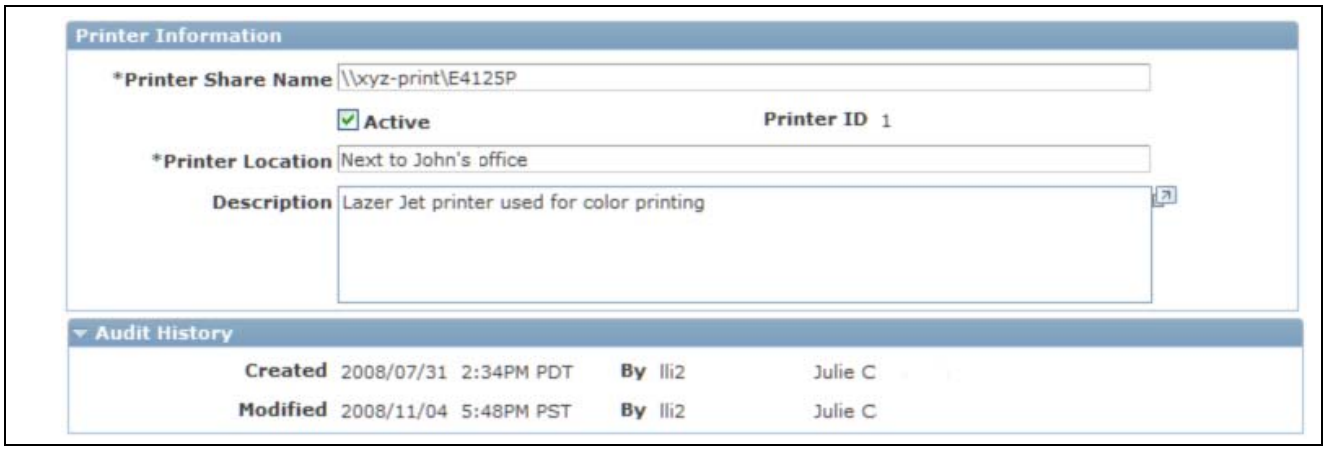

Printer Information page

3. Save the page.

Note. Ensure that the printers listed on this page are mapped to the Process Scheduler server machine and can print for that machine.

Task 2-8: Defining the CLASSPATH for Sun Java Mail Files

The final step ensures that the correct Sun Java Mail class files are used. The class files are in a JAR file named *mail.jar*, in the <*PS_HOME*>/class directory. This directory contains many JAR files, some also include Sun Java Mail class files. The other releases of Sun Java Mail may not be correct. You must ensure that the correct Sun Java Mail class files in mail.jar are used at runtime.

To do this, you must update the CLASSPATH in the Application server and Process Scheduler server configuration files to load the mail.jar file first.

- Application Server configuration file

  Found in <*PS_CFG_HOME*>/appserv/[domain name]/psappsrv.cfg

- Process Scheduler Server configuration file

  Found in <*PS_CFG_HOME*>/appserv/prcs/[domain name]/psprcs.cfg

In both of these configuration files, you will see a section in the [PSTOOLS] for setting the CLASSPATH:

```
;To add directories or jar files to CLASSPATH for the jvm loaded via JNI, unco
;and set it equal to the list of elements you would like to use.
;The classpath elements need to be seperated using the path seperator specific
;For Example: Add to CLASSPATH=/usr/class:/home/user/class
;Add to CLASSPATH=
```

This should be updated to read:

```
;To add directories or jar files to CLASSPATH for the jvm loaded via JNI, unco
;and set it equal to the list of elements you would like to use.
;The classpath elements need to be seperated using the path seperator specific
;For Example: Add to CLASSPATH=/usr/class:/home/user/class
Add to CLASSPATH=<PS_HOME>/class/mail.jar;
```


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where <*PS_HOME*> is substituted with the physical drive location (Example: c:\PT<current PeopleTools release number>)

Note. You must restart the servers after making the change.

Note. On UNIX, mail.jar files are available in <*PS_HOME*>/appserv/classes.

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CHAPTER 3

Installing PeopleSoft Online Marketing 9.1

This chapter discusses:

- Understanding PeopleSoft Online Marketing Setup
- Prerequisites
- Configuring PeopleSoft OLM System Parameters
- Setting Up the FTP Server URL for File Upload
- Setting the PS_FILEDIR Environment Variable
- Setting Up Web Profile to Bypass the Sign-In Page
- Assigning PeopleSoft OLM Self-Service Permissions
- Setting Up PeopleSoft OLM Integration Points
- Installing the DES on the Oracle WebLogic Server
- Installing the DES on an IBM WebSphere Server
- Retrieving and Installing JDBC Drivers
- Cybersource Credit Card Integration Configuration
- Testing the DES Installation
- Testing the Email Server
- Adding Standalone Dialog Servers (Optional)
- Installing Adobe Graphic Dialog Flow Designer
- Setting Up Profiles
- Tuning the System (Optional)

Understanding PeopleSoft Online Marketing Setup

This chapter provides instructions for the installation and set up of Oracle's PeopleSoft CRM Online Marketing (OLM) server and related components.

Note. Oracle recommends that you consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index that can be found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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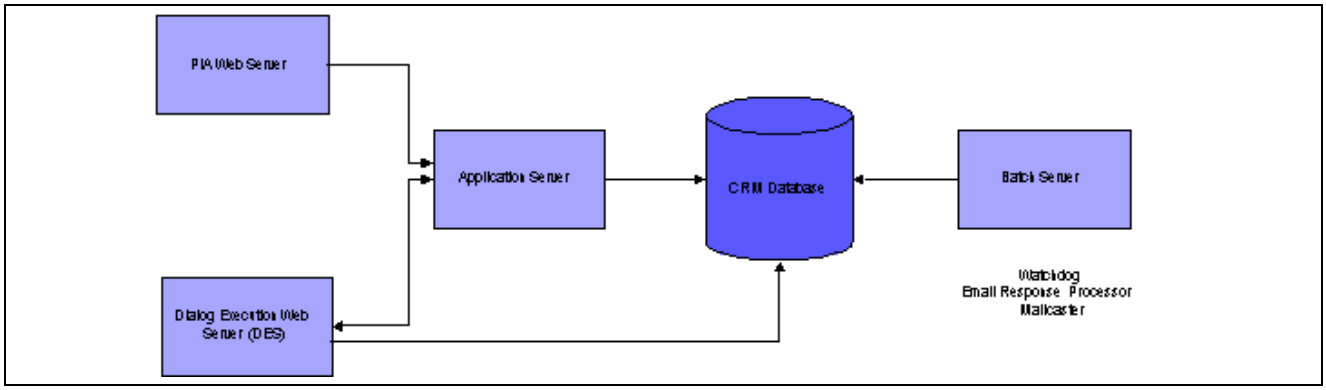
Note. If you are running Oracle, ensure that your client connectivity, database and JDBC versions match. For example, if your database is on 10.2.0.3, ensure that your client connectivity matches the database version, as well as the JDBC version. PeopleSoft OLM does not support mixed versions.

The following diagram shows the PeopleSoft CRM OLM architecture:



PeopleSoft OLM architecture

The overall process for installing the PeopleSoft CRM OLM server and related components includes the steps that we outline here.

To install the PeopleSoft CRM OLM system:

1. Install the database (such as Oracle 10g).

   Note. If you are running DB2 LUW from HP-UX and you are going to install a non-Unicode CRM database, verify that your environment variable *LANG* in the HP-UX system has a character set of *iso88591*; for example, *en_US.iso88591*. Otherwise, the JDBC connection error "Encoding not supported!" will occur in OLM components. Before you create the database, you must change the HP-UX default code-page from Roman 8 to the character set that you plan to use for the database; that is, export LANG=en_US.iso88591.

2. Install and configure the PeopleSoft CRM 9.1 database and software (PeopleSoft PeopleTools, Oracle Tuxedo, and so on).
3. Install an additional component SMTP-compliant email server; for example, L-Soft LSMTP or IronPort.

   Note. Oracle does not provide this software; you must purchase it separately.

4. Install PeopleSoft OLM components.

   For example: Dialog Execution Server, Mailcaster, Email Response Processor.

See Appendix: “Reviewing Tablespaces and Parameters for PeopleSoft CRM Online Marketing.”

Prerequisites

Before you begin the PeopleSoft CRM OLM installation, ensure that these requirements are met:

- You have the PeopleSoft CRM 9.1 CD.

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- Your PeopleSoft CRM environment is fully functional, with the PeopleSoft Application Server, Oracle Tuxedo, and at least one Tuxedo Batch Server installed.
- Oracle's PeopleSoft Pure Internet Architecture web server is installed.
- The JOLT publish/subscribe servers are configured for your application server.
- The Process Scheduler server is installed.
- The Dialog administrator *Dialog Administrator* and Process Scheduler administrator *ProcessSchedulerAdmin* roles are assigned to your Administrator user ID.
- You have the correct configuration and kernel settings on UNIX.

Note. Before you make the following changes, check with your UNIX system administrator and hardware vendor, to ensure that these recommendations are compatible with your system.

Note. You need to install a minimum Tools patch level of 8.52.08 or higher if you are using IBM WebSphere server.

The kernel file /etc/system should be configured with the following values for file descriptors:

```
* set soft limit on file descriptors
set rlim_fd_cur=1024
* set hard limit on file descriptors
set rlim_fd_max=4096
```

PeopleSoft OLM does not run on all hardware and software platforms that PeopleSoft PeopleTools supports. You must ensure that you have compatible hardware and software by reviewing the PeopleSoft CRM 9.1 Hardware and Software Requirements guide, available on My Oracle Support.

See Also

Installing the DES on the Oracle WebLogic Server

Installing the DES on an IBM WebSphere Server

"PeopleSoft CRM 9.1 Hardware and Software Requirements"

Task 3-1: Configuring PeopleSoft OLM System Parameters

This task describes the parameters that the Dialog Execution Server (DES) and Mailcaster use. You must set the following parameters before you install the PeopleSoft OLM servers.

Note. The parameters that WatchDog and Email Response Processors use are discussed in the *PeopleSoft Online Marketing 9.1 PeopleBook*.

To set parameter values:

1. Select Set Up CRM, Product Related, Online Marketing, Settings.

   The Dialog Execution Server Settings page appears, as shown in the following example:

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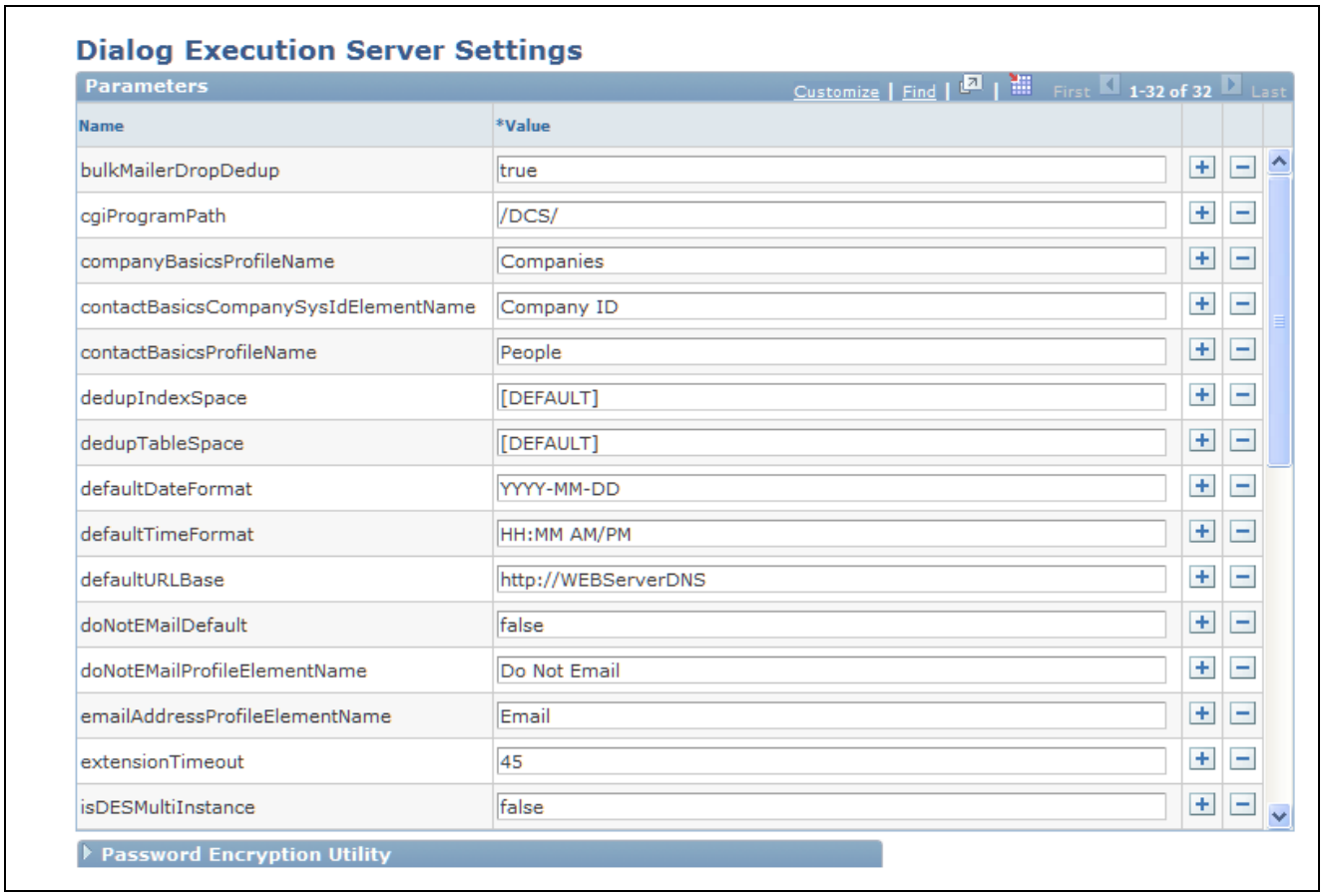

Dialog Execution Server Settings page

2. Set the following parameters as specified:

Note. If a parameter does not appear on the Dialog Execution Server Settings page, click the Add button to add the parameter. Some entries list as "PSCipher encrypted." Use the encryption utility at the bottom of the Dialog Execution Server Settings page to encrypt these values.

- defaultURLBase—The URL for the Dialog web server, including the DES HTTP/HTTPS port number.

  The format is *http://www.foo.com:82*

- psAppServerURL—The host and port of Oracle Tuxedo.

  The format is *//appserv.foo.com:9000*

- psToolsRel—The PeopleSoft PeopleTools version of Oracle Tuxedo.

  The format is *8.52*. After every PeopleSoft PeopleTools release or PeopleSoft PeopleTools patch upgrade, you must update this variable.

- psPIAServerURL—The CRM PeopleSoft Pure Internet Architecture server, including the port number.

  The format is *http:// <CRM PIA web server:port>*.

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- smtpServerNames—The mail servers (semicolon separated), including the port numbers and thread counts, for use by the mailcasters.

  The number of send mail threads must be at least 1, and no larger than 500. The default if none is specified is 1, and if a number greater than 500 is specified, 500 is used. The default port number is 25.

  The format is *mail1.foo.com:25:threads=5;mail2.foo.com:25:threads=5*.
- psOperatorId—The application server operator ID; for example, VP1.
- psOperatorPassword—The application server operator password (PSCipher encrypted).
- psIBLocalNode—The local node of PeopleSoft Integration Broker.
- psIBLocalNodePassword—The PeopleSoft Integration Broker password (PSCipher encrypted).
- dbVendor—The value depends on the RDBMS.

  Enter *DB2UDB*, *ORACLE*, or *MSSQL*.
- dedupIndexSpace—The value depends on the RDBMS.

  For MSSQL set to *[DEFAULT]*, for Oracle set to *RYWORK*, or for DB2UDB set to *RYWORKIDX*.
- dedupTableSpace—The value depends on the RDBMS.

  For MSSQL set to *[DEFAULT]*, for Oracle set to *RYWORK*, or for DB2UDB set to *RYWORK*.
- ConnectId—The database user name; for example, EMDBO.
- ConnectPswd—The database users password (PSCipher encrypted).
- jdbcDriver—The class name of the JDBC driver that you use.

  This should be one of the following:

  For MSSQL, enter *com.microsoft.sqlserver.jdbc.SQLServerDriver*.

  For Oracle, enter *oracle.jdbc.driver.OracleDriver*.

  For DB2UDB, enter *com.ibm.db2.jcc.DB2Driver*.
- dbServerURL—The JDBC connection URL.

  This value contains information about the database server, port (when applicable), and database instance. The format of the URL is also dependent on the JDBC driver. The available formats are as follows:

  For MSSQL, use jdbc:sqlserver://server:port;DatabaseName=dbInstance;sql70=true;charset=Cp1252.

  For Oracle, use jdbc:oracle:thin:@server:port:dbInstance.

  For DB2UDB, use jdbc:db2://server:port/dbInstance.

You can set parameters directly in the configuration file for the specific component. Parameters that you save in these locations have the following precedence:

- The highest precedence are the configuration files (DES.config, MCR.config, ERP.config and WDG.config). PeopleSoft OLM always uses the values set in the configuration files.
- The lowest precedence is the Dialog Execution Server Settings page. Values that you define on the Dialog Execution Server Settings page are overridden by values set in the other locations.

The advantage of using the Dialog Execution Server Settings page is that these settings are used globally. This provides easier system maintenance. Use configuration files only for the database connection values.

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Task 3-2: Setting Up the FTP Server URL for File Upload

The File Upload feature of PeopleSoft CRM OLM requires an FTP server. You must specify the URL for the FTP server in the PeopleSoft CRM system.

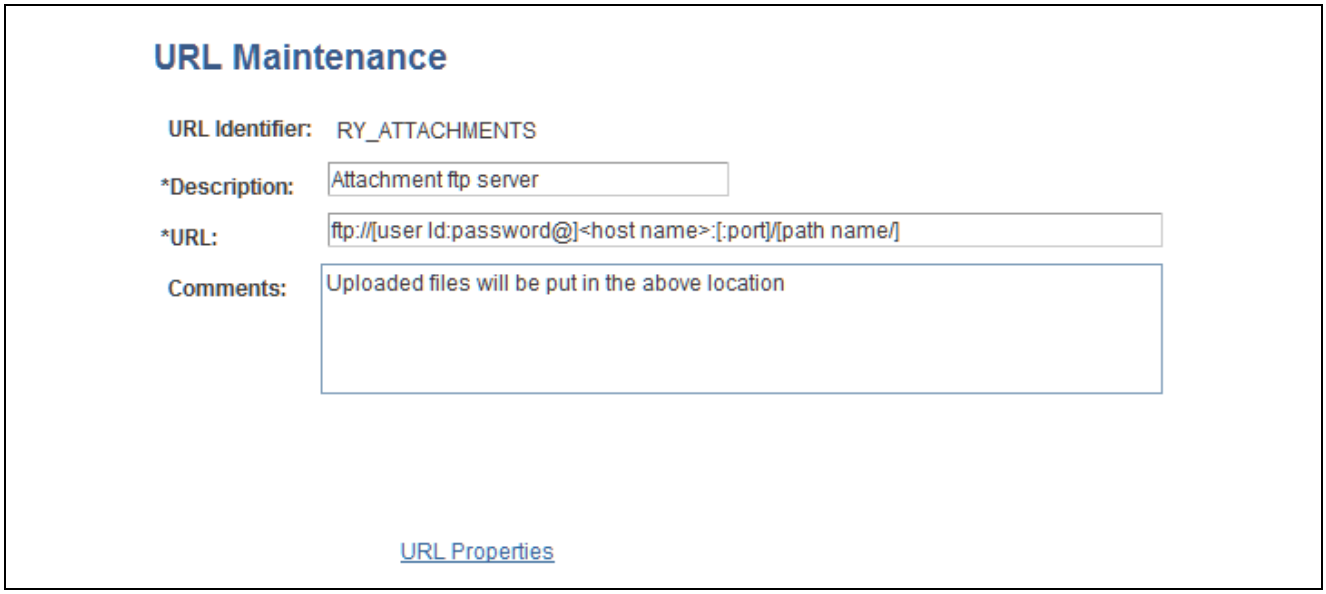
To specify the FTP URL:

1. Select PeopleTools, Utilities, Administration, URLs.

   The URL Search page appears.

2. Search for the *RY_ATTACHMENTS* URL and open it.

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



URL Maintenance page

3. Verify that the *RY_ATTACHMENTS* URL in the URL field contains the value of a valid FTP server location for use by PeopleSoft CRM OLM during the file upload procedure.

   If this URL is no longer valid or the location of the FTP server has changed, you must update this URL accordingly.

4. Repeat steps 1 and 2 for RY_DRE. Verify that the RY_DRE URL in the URL field contains the value of a valid FTP server location for use by PeopleSoft CRM OLM during the file upload procedure, as shown in the following example:

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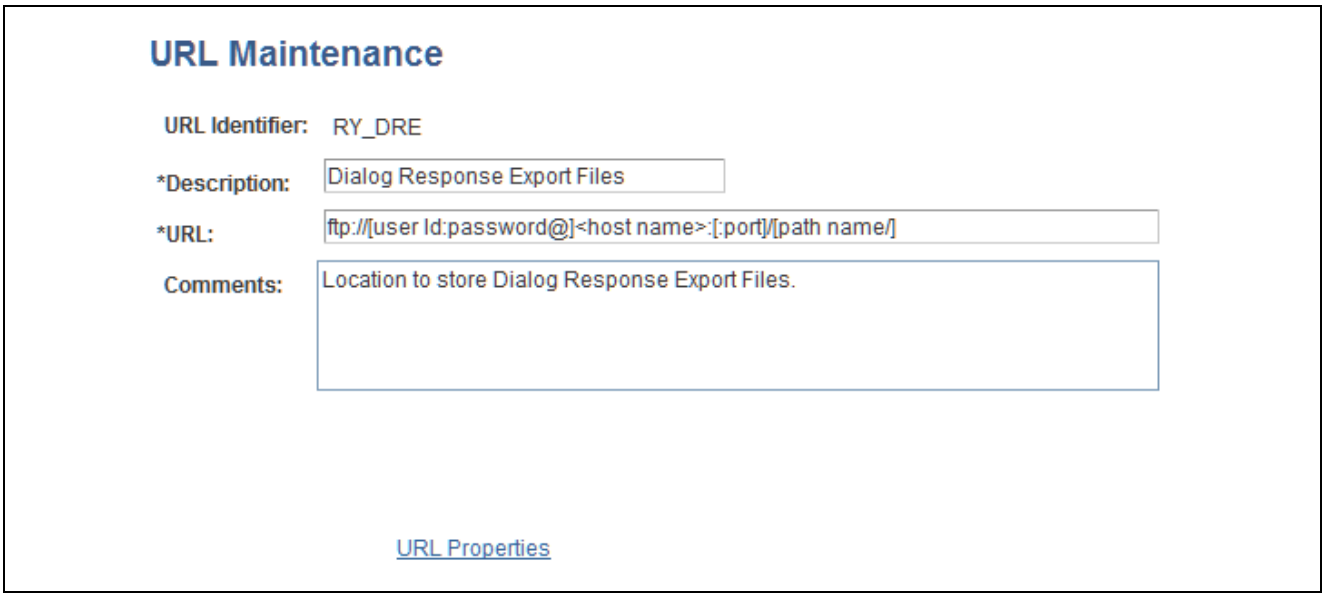

URL Maintenance page

Task 3-3: Setting the PS_FILEDIR Environment Variable

The administrator must set the PS_FILEDIR environment variable on the server where the Process Scheduler is running. This variable is usually set to PS_CFG_HOME\appserv\prcs\<*db_name*>\files\. This is required in order to write files to the application server and process scheduler server.

Refer to your operating system documentation for information about how to set environment variables.

Task 3-4: Setting Up Web Profile to Bypass the Sign-In Page

To access the PeopleSoft CRM Self-Service component directly from the Dialog Login page, the PeopleSoft Pure Internet Architecture web profile must be set to sign in by default. This means that you must bypass the PeopleSoft Pure Internet Architecture sign-in page.

To set up the web profile to bypass the sign-in page:

1. Decide which PeopleSoft Pure Internet Architecture server needs to bypass the sign-in page.
2. Open the *configuration.properties* file and note the value of the Web Profile parameter (for example, *DEV*).

Note. The default location of the *configuration.properties* file is:

For PeopleSoft Pure Internet Architecture on Oracle WebLogic and IBM WebSphere:

<%PS_CFG_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL.war\WEB-INF\ psftdocs\ps

---

The value of the Web Profile parameter was specified in the Web Profile Name field during the PeopleSoft Pure Internet Architecture installation, as shown in the following example:

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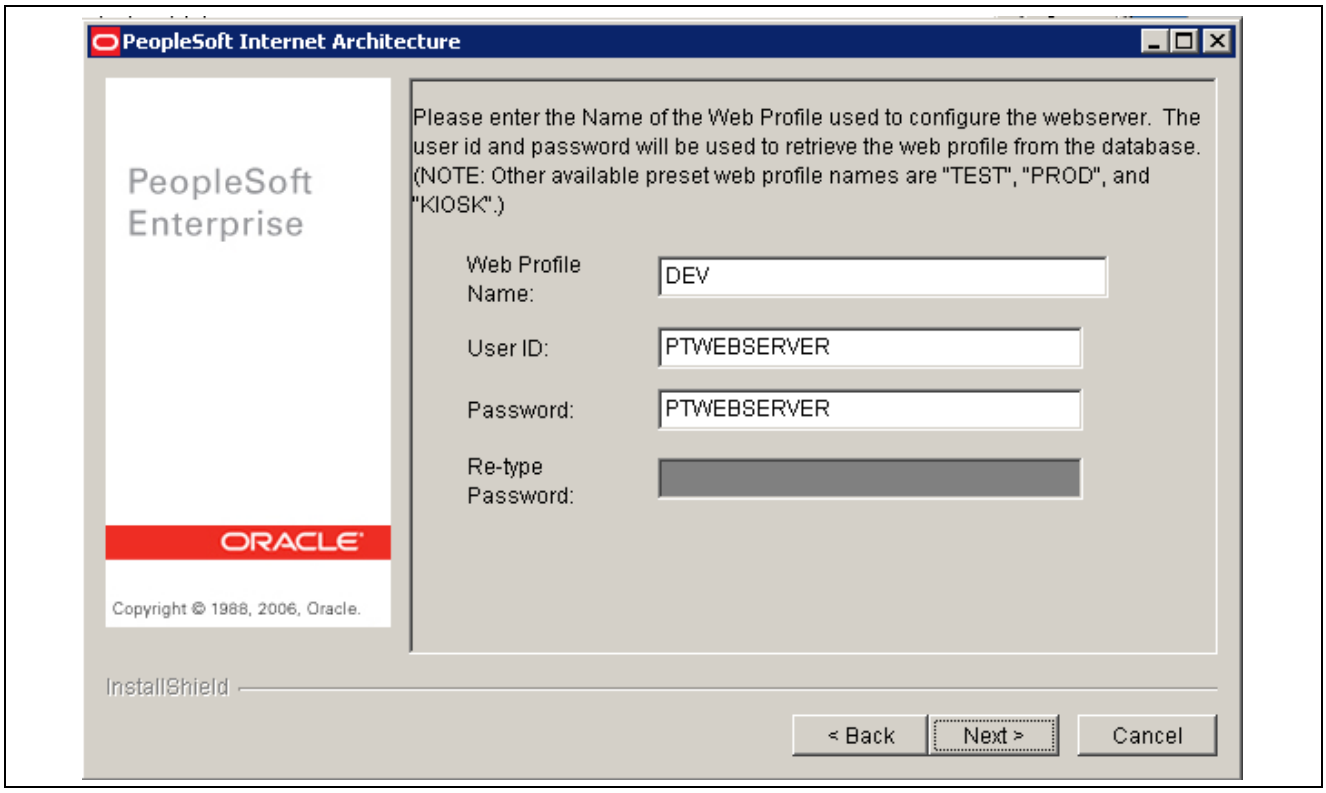
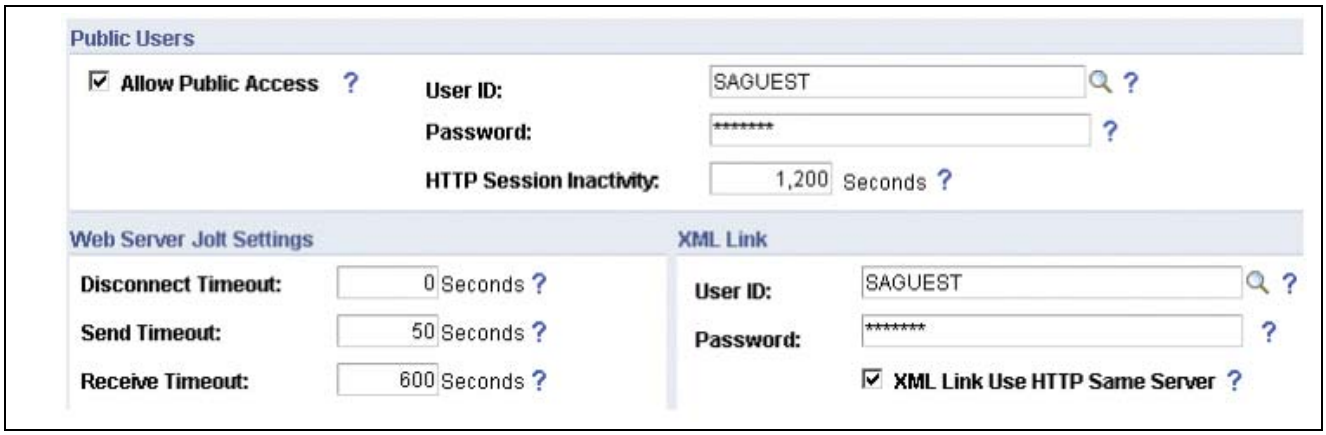


PeopleSoft Internet Architecture: Web Profile page

3. Select PeopleTools, Web Profile, Web Profile Configuration.
4. Search for and open the web profile that is defined in the *configuration.properties* file (for example, *DEV*).
5. Select the Security tab.
6. In the Public Users section, select the Allow Public Access check box, as shown in the following example:



Web Profile page: Security tab

7. In the User ID and Password fields, select *SAGUEST.*
8. Click Save.
9. Restart the PeopleSoft Pure Internet Architecture server.

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Task 3-5: Assigning PeopleSoft OLM Self-Service Permissions

This section discusses:

- Understanding PeopleSoft Self-Service Permissions
- Registering a PeopleSoft OLM User in Self-Service
- Assigning Self-Service Roles to PeopleSoft OLM Users

Understanding PeopleSoft Self-Service Permissions

You must assign the PeopleSoft Order Capture Self Service (OCSS) permission to the PeopleSoft OLM user. Users *SAGUEST* and *OLM* deliver with the appropriate self-service settings.

Note. For users *SAGUEST* and *OLM*, you can skip this task.

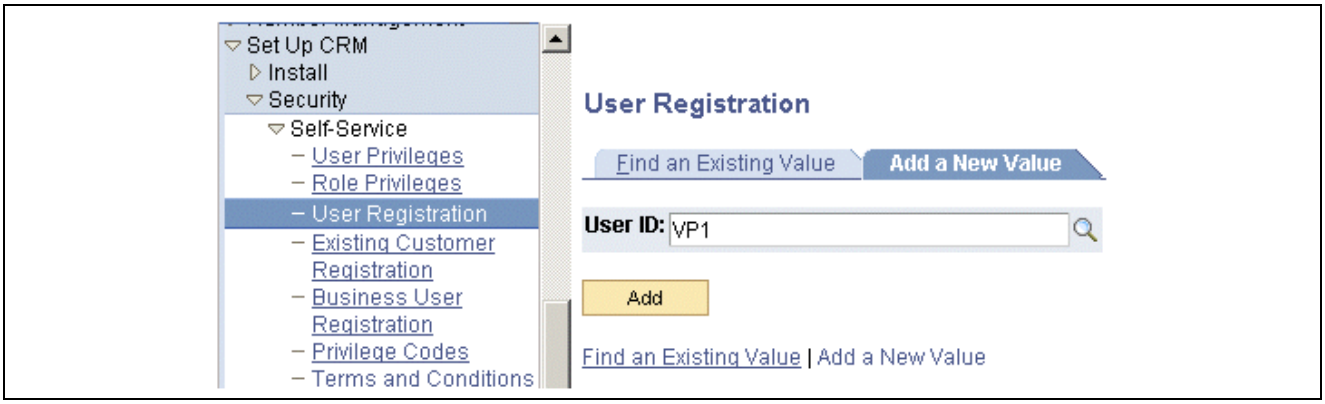
Use the procedures in this section to add new PeopleSoft OLM users as self-service users if:

- The user requires execution of a dialog that includes creating a self-service user from the Dialog Link Report (this is not common).
- The user is a self-service "dummy" GUEST user (for example, *SAGUEST*) that requires the ability to register new users from the Dialog Login page.

Task 3-5-1: Registering a PeopleSoft OLM User in Self-Service

To register a PeopleSoft OLM user in the self-service application:

1. Select Set Up CRM, Security, Self-Service, User Registration.
2. Select the Add a New Value tab and enter a user ID (for example, *VP1*), as shown in the following example:



User Registration page: Add a New Value tab

3. Click Add.
4. Refer to the following example of the User Registration Setup page, and then complete the page with the information that follows:

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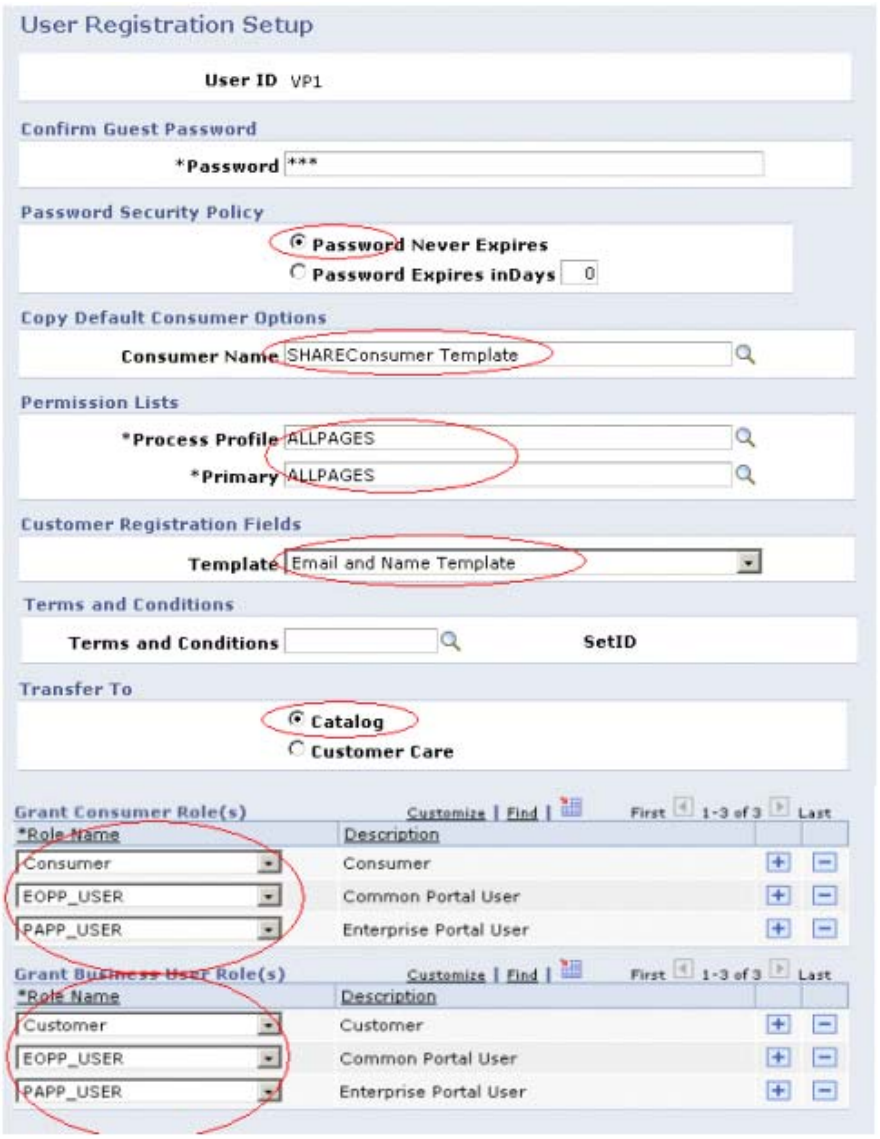

Example of the User Registration Setup page

- In the Password Security Policy section, select the Password Never Expires option.
- In the Copy Default Consumer Options section, in the Consumer Name field, enter *SHAREConsumer Template.*
- In the Permission Lists section, in the Process Profile and Primary fields, enter *ALLPAGES.*
- In the Customer Registration Fields section, in the Template field, select *Email and Name Template* from the drop-down list.
- In the Transfer To section, select the Catalog option.
- Under Grant Consumer Role(s), add the role names *Consumer*, *EOPP_USER*, and *PAPP_USER.*
- Under Grant Business Role(s), add the role names *Consumer*, *EOPP_USER*, and *PAPP_USER.*

5. Click Save.

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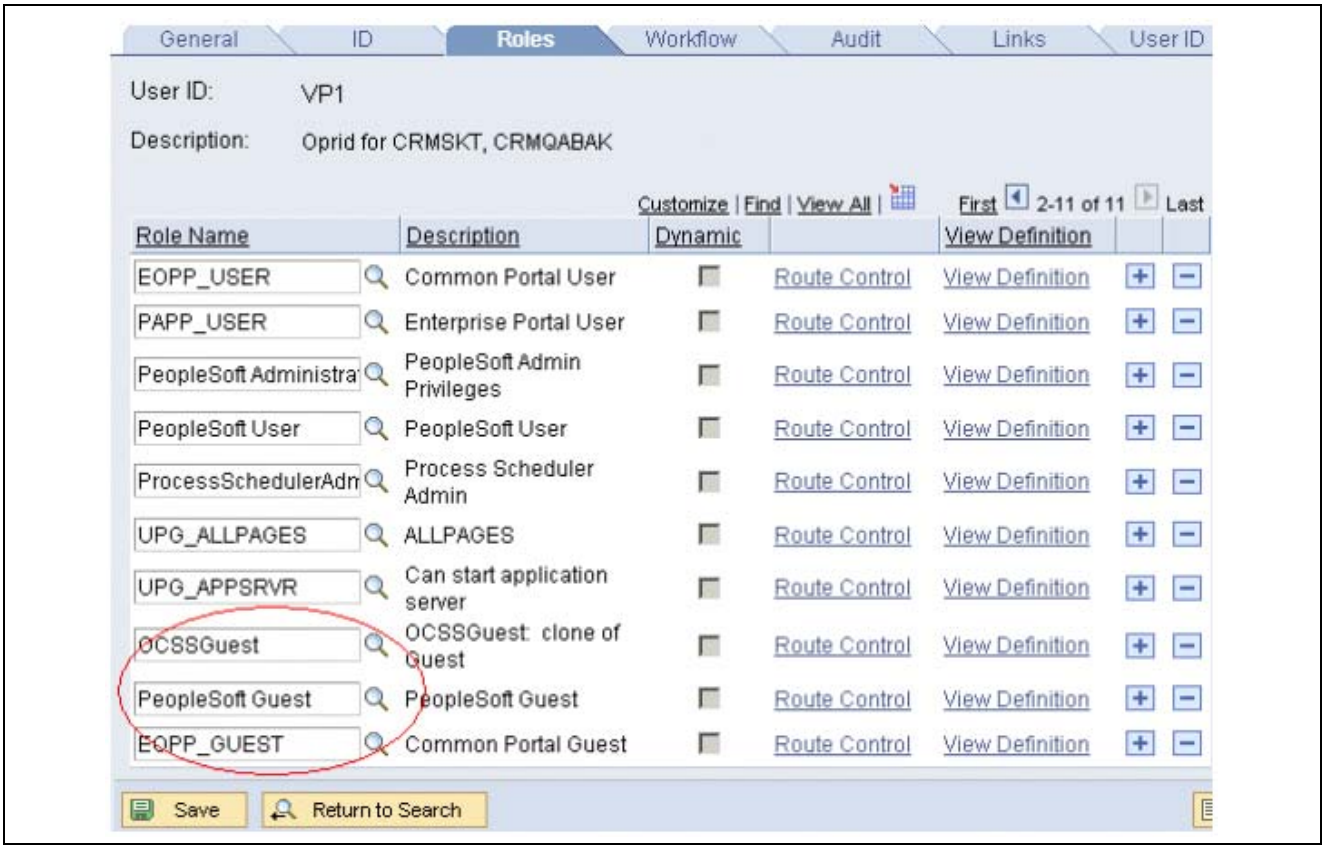
Task 3-5-2: Assigning Self-Service Roles to PeopleSoft OLM Users

To assign self-service roles to a PeopleSoft OLM user:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. Search for the appropriate user ID (for example, *VP1*) and select the Roles tab.
3. Ensure that you add the following three roles to the list of role names, as shown in the following example:



User Roles tab

   - OCSSGuest
   - PeopleSoft Guest
   - EOPP_GUEST
4. Click Save.
5. If you receive the following message, click OK:

   ```
   Warning -- PERSON_ID = '<a ID>' assigned to another User ID.
   ```
6. Select the ID tab, and then select *Person* from the ID Type drop-down list.
7. Enter a person ID in the Attribute Value field, and note the person ID or person's name (*100946* or *Template, SHAREConsumer*), as shown in the following example:

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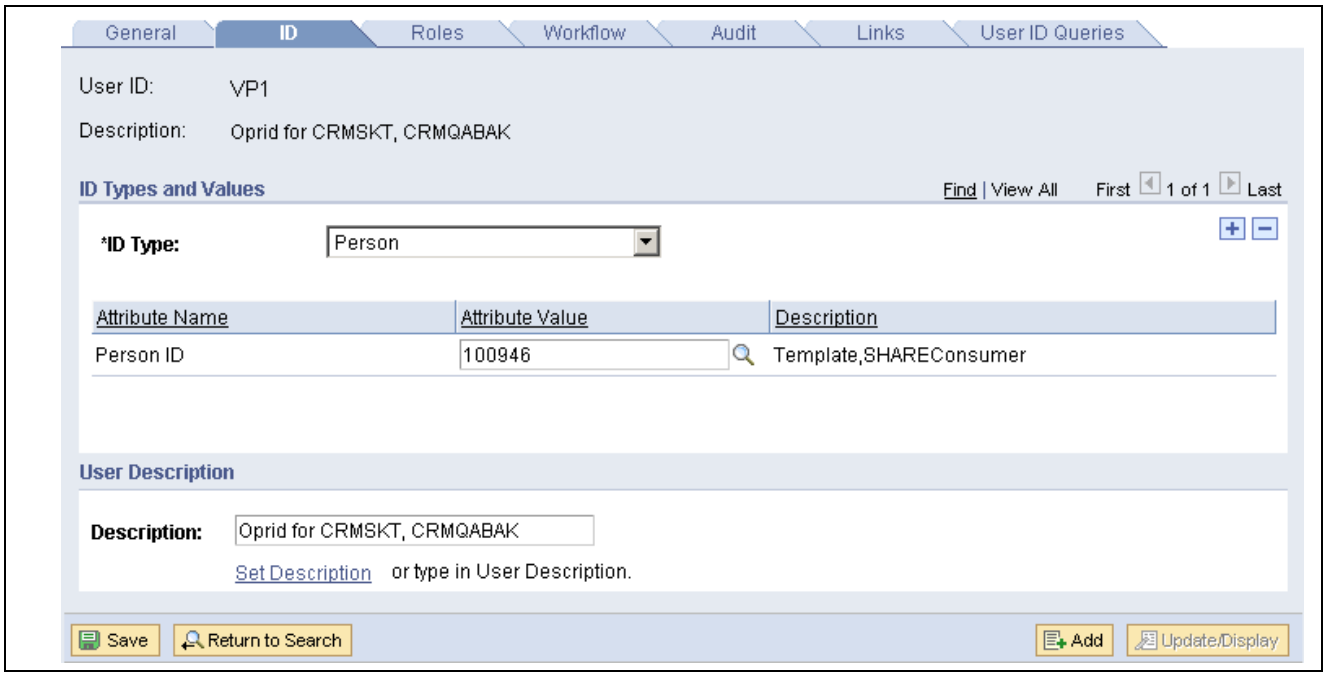

ID tab

This person is defined in the Demo database with both business contact and consumer roles.

Note. If you are working on the system database, you must create a person first, and that person should have both business contact and consumer roles. For information about Person creation, refer to the *PeopleSoft CRM 9.1 Business Object Management PeopleBook.*

8. Click Save.

Task 3-6: Setting Up PeopleSoft OLM Integration Points

This section discusses:

- Understanding PeopleSoft OLM Messages
- Loading Gateway Connectors
- Setting PeopleSoft Integration Security Properties
- Setting Up the URL for the PSFT_OLM Node

Understanding PeopleSoft OLM Messages

PeopleSoft CRM OLM uses XML messages that are sent directly to the PeopleSoft Integration Broker using JOLT. Additionally, messages are used to update the PeopleSoft OLM Activation Framework whenever a profile status is modified. The following tasks set up PeopleSoft OLM internal Enterprise Integration Points (EIP).

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Task 3-6-1: Loading Gateway Connectors

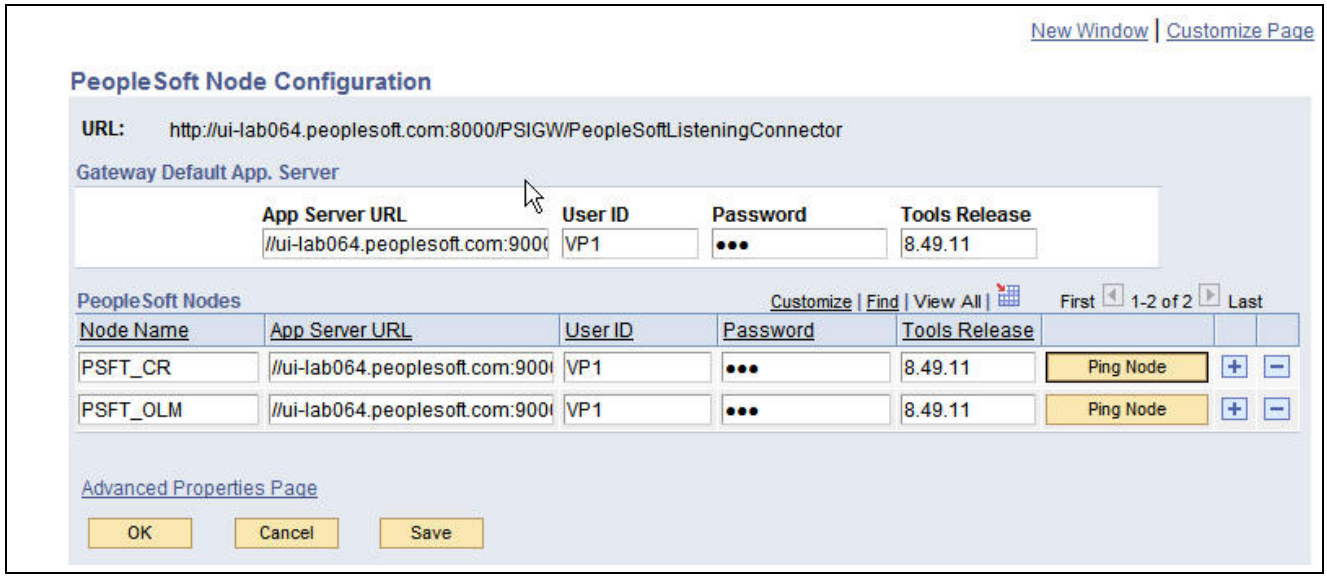
To load gateway connectors:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search.
3. Replace *<webserver>:<port>* with this URL:

   `http://<webserver>:<port>/PSIGW/PeopleSoftListeningConnector`

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

Note. To ensure proper routing of messages, ensure that the gateway properties is set up with both the default integration broker node, PSFT_CR, and the default OLM node, PSFT_OLM, as shown in the following example:



Example of PeopleSoft Node Configurations

Task 3-6-2: Setting PeopleSoft Integration Security Properties

For PeopleSoft PeopleTools 8.52 and above, encryption of the Gateway property *secureFileKeystorePasswd* is required. For more details about gateway property and encryption requirements, see PeopleSoft PeopleTools 8.52 PeopleBook: Integration Broker Administration, for your database platform.

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for and open the Local Gateway.
3. Click the Gateway Setup Properties link, and then login to the Gateway Properties.
4. Click the Advanced Properties link, then locate the property *secureFileKeystorePasswd* and verify that it is encrypted.

   If this property is *not* encrypted, use the Password Encryption utility that is available at the bottom of the Gateway Properties - Advanced Properties page to encrypt the password value. This replaces the plain password with an encrypted value and fulfills the requirement.

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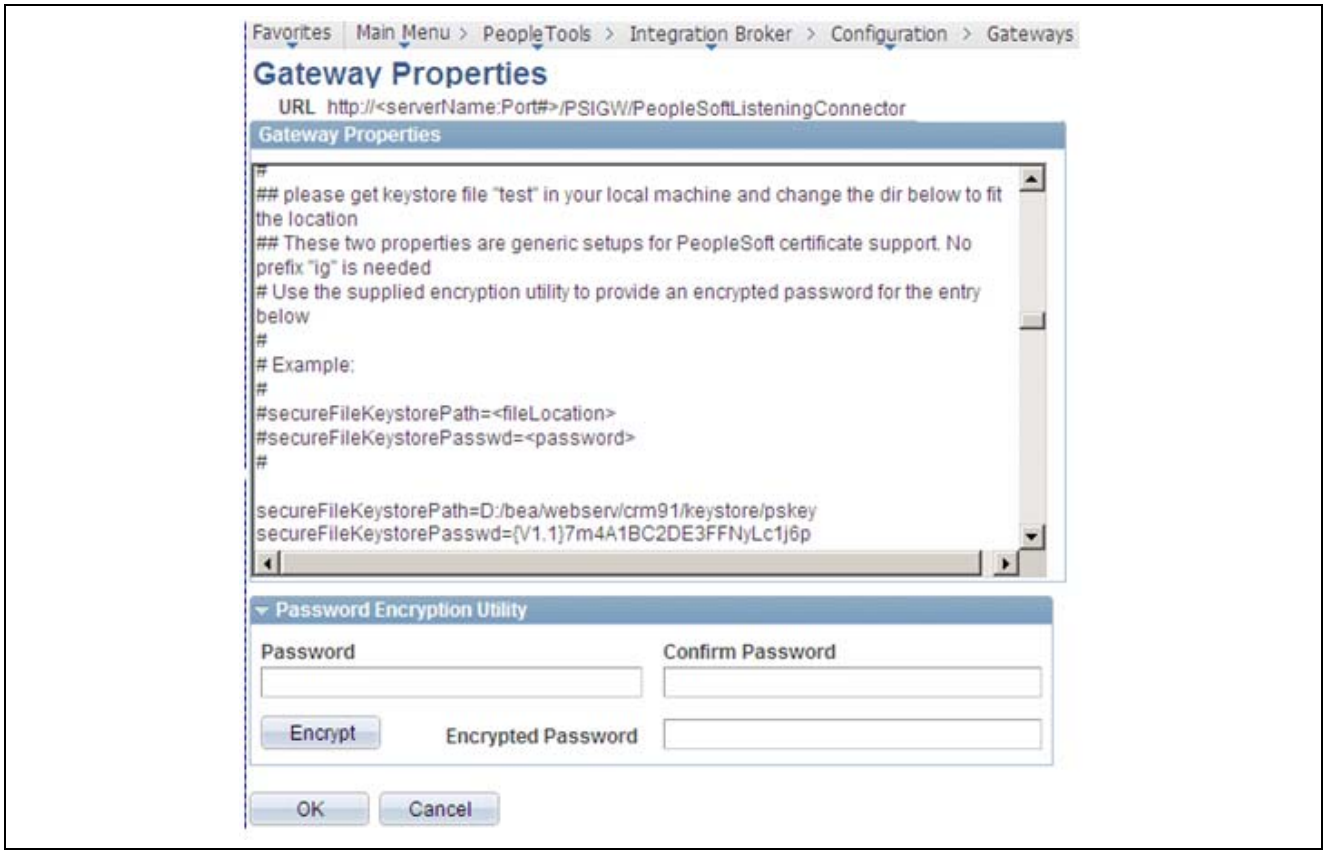
5. Click OK, and then click Save to save your settings.
6. Click OK to exit the Gateway Properties page.
7. Click Save again, to save the changes that you made to the Gateway.

Warning! Integrations will fail if you do not set the path to the keystore using the *secureFileKeystorePath* property and enter an encrypted keystore password for the *secureFileKeystorePasswd* property.

The following example shows the Gateway Properties - Advanced Properties page with the Password Encryption utility and an encryption example:



Gateway Properties - Advanced Properties page

Task 3-6-3: Setting Up the URL for the PSFT_OLM Node

To set up the URL for the PSFT_OLM node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the PSFT_OLM node.
3. Select the Connectors tab.
4. Modify the PRIMARYURL property, replacing *<webserver>:<port>* with the Dialog Execution Server (DES) name and port:

   `http://<webserver>:<port>/DCS/DlgBroker`

5. Click Save.

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Note. If you do not set up the Gateway, the connector HTTPTARGET will not be available.

Task 3-7: Installing the DES on the Oracle WebLogic Server

This section discusses:

- Understanding DES Installation on Oracle WebLogic
- Installing DES on Oracle WebLogic for MS Windows
- Installing the DES on Oracle WebLogic on UNIX
- Modifying the setEnv.sh
- Starting the DES on an Oracle WebLogic Server

Understanding DES Installation on Oracle WebLogic

You cannot use an existing PeopleSoft Pure Internet Architecture domain on an Oracle WebLogic Server for the Dialog Execution Server (DES). A new Oracle WebLogic domain gets created during the DES installation. Additionally, you cannot use the same PeopleSoft Pure Internet Architecture HTTP/HTTPS port number for the DES HTTP/HTTPS port number.

Task 3-7-1: Installing DES on Oracle WebLogic for MS Windows

To install the DES application on an Oracle WebLogic Server running on Microsoft Windows:

1. Go to *PS_HOME*\setup\PsMpWebAppDeployInstall and run setup.bat.

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

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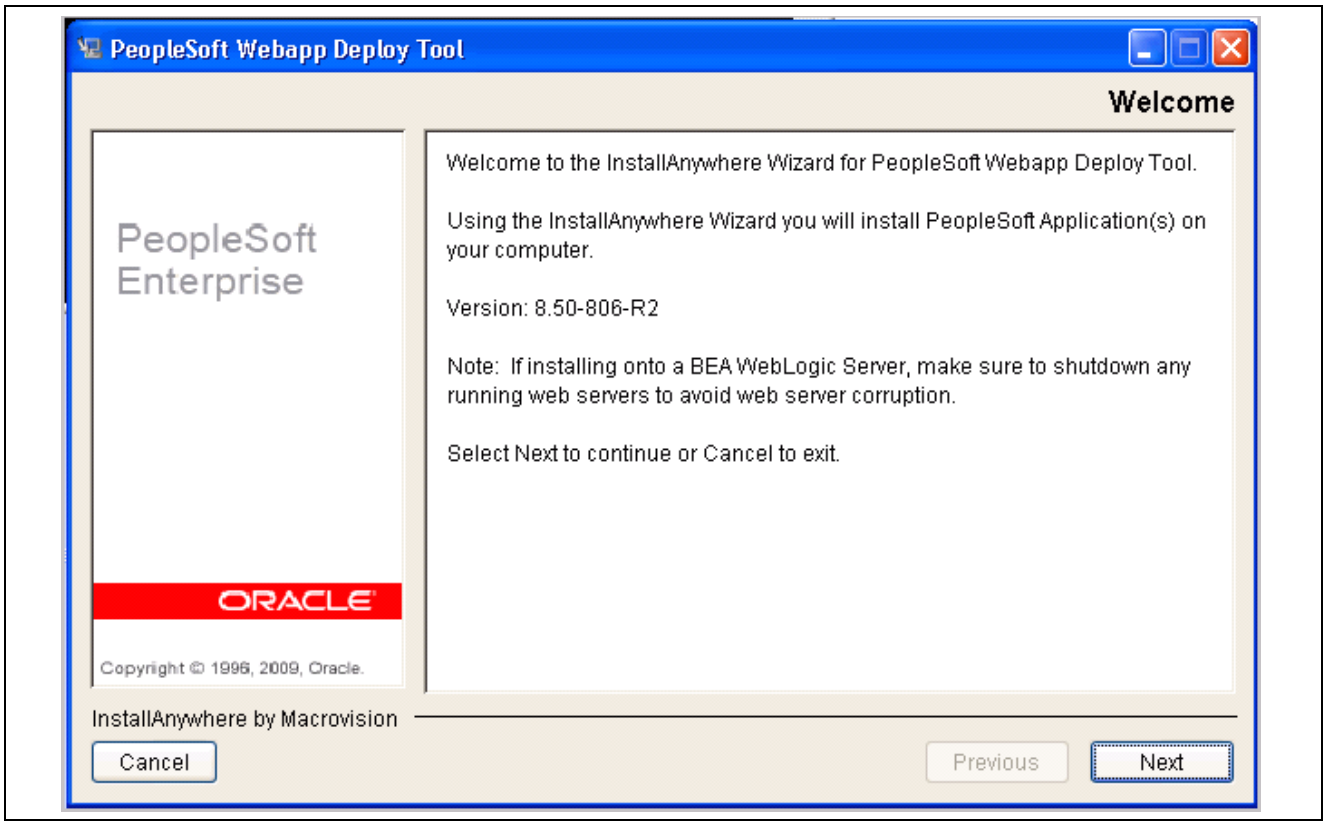

PeopleSoft Webapp Deploy: Welcome page

2. On the Welcome page, click Next.

   The PeopleSoft PeopleTools home directory selection page appears, as shown in the following example:

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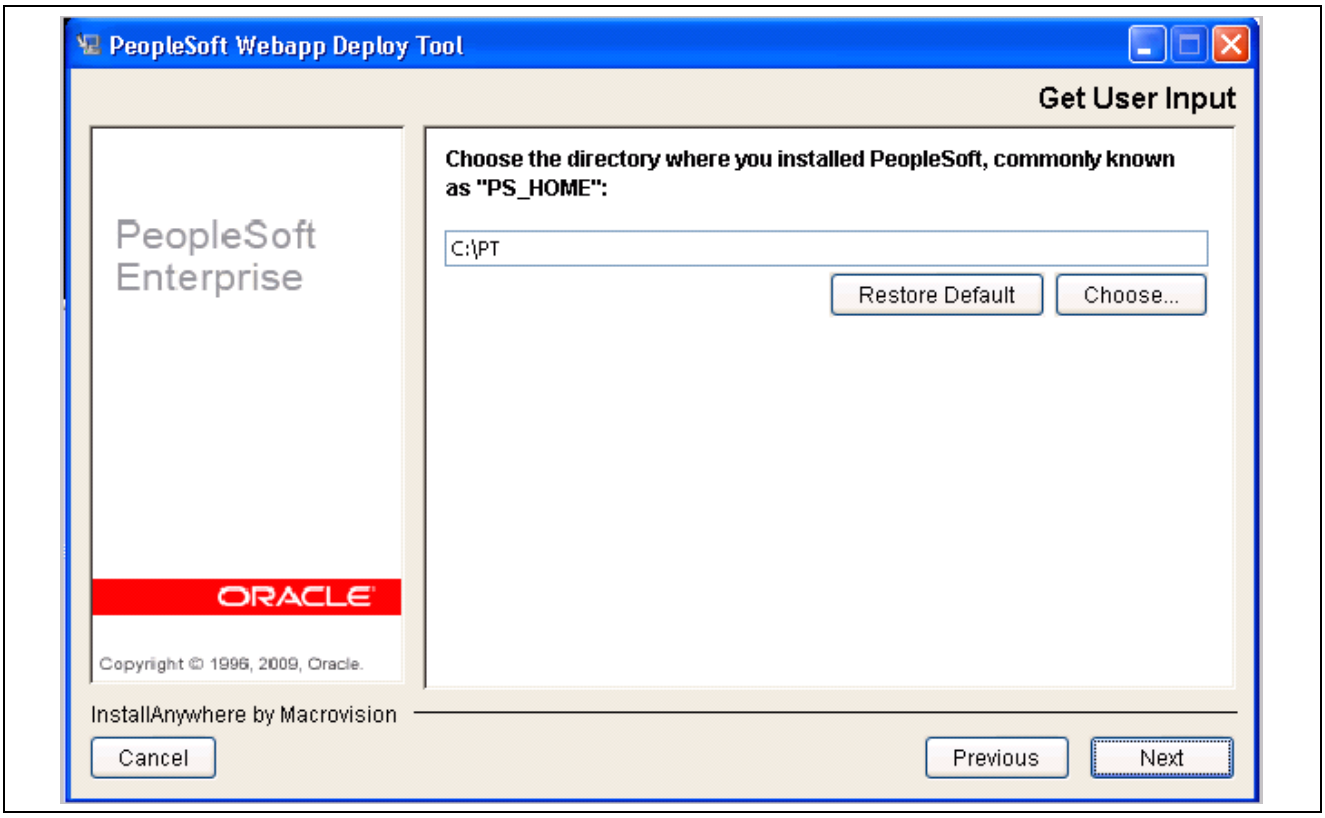

PeopleSoft PeopleTools home directory selection page

3. On the PeopleSoft PeopleTools home directory selection page, enter the *PS_HOME* directory (where you installed your PeopleSoft PeopleTools application) and click Next.

   The Web server selection page appears, as shown in the following example:

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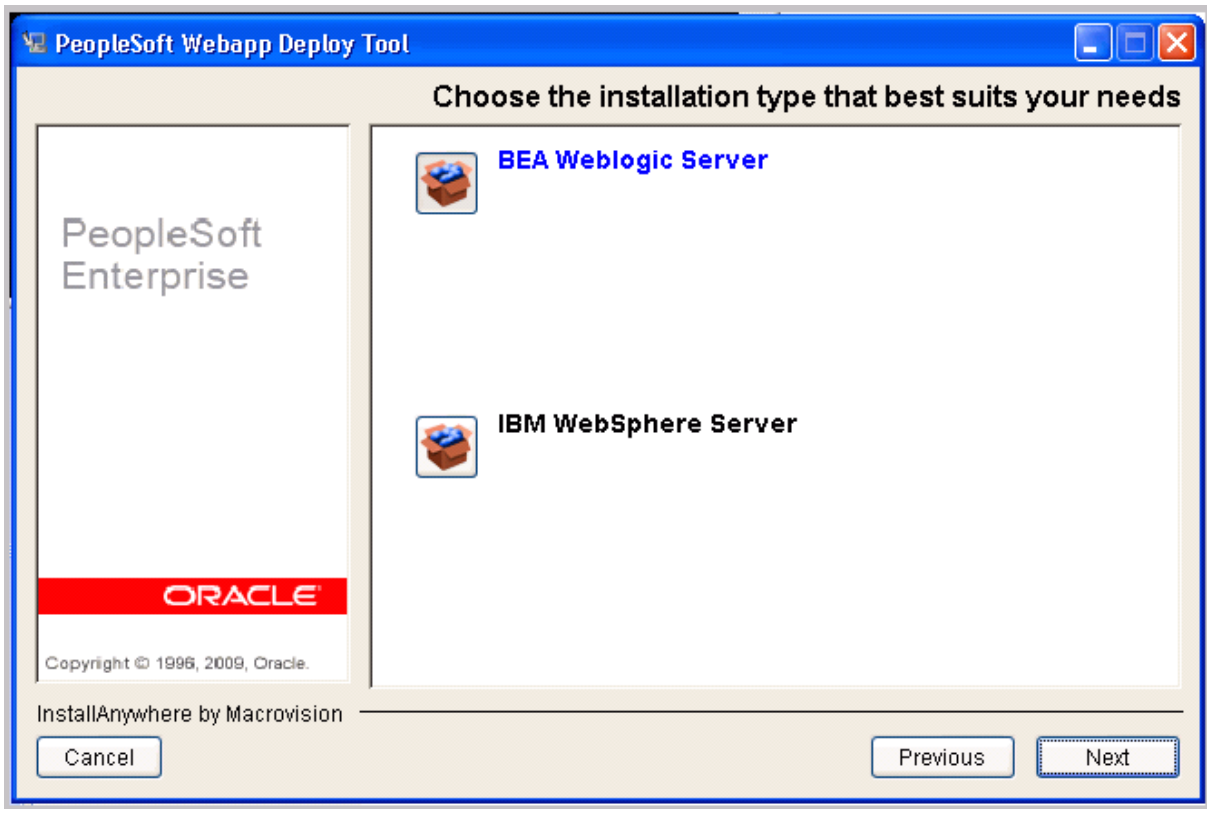

PeopleSoft Webapp Deploy: Web server selection page

4. On the web server selection page, select the BEA WebLogic Server option and click Next.
5. Enter the WebLogic Server root directory (for example, *c:\bea*), as shown in the following example:

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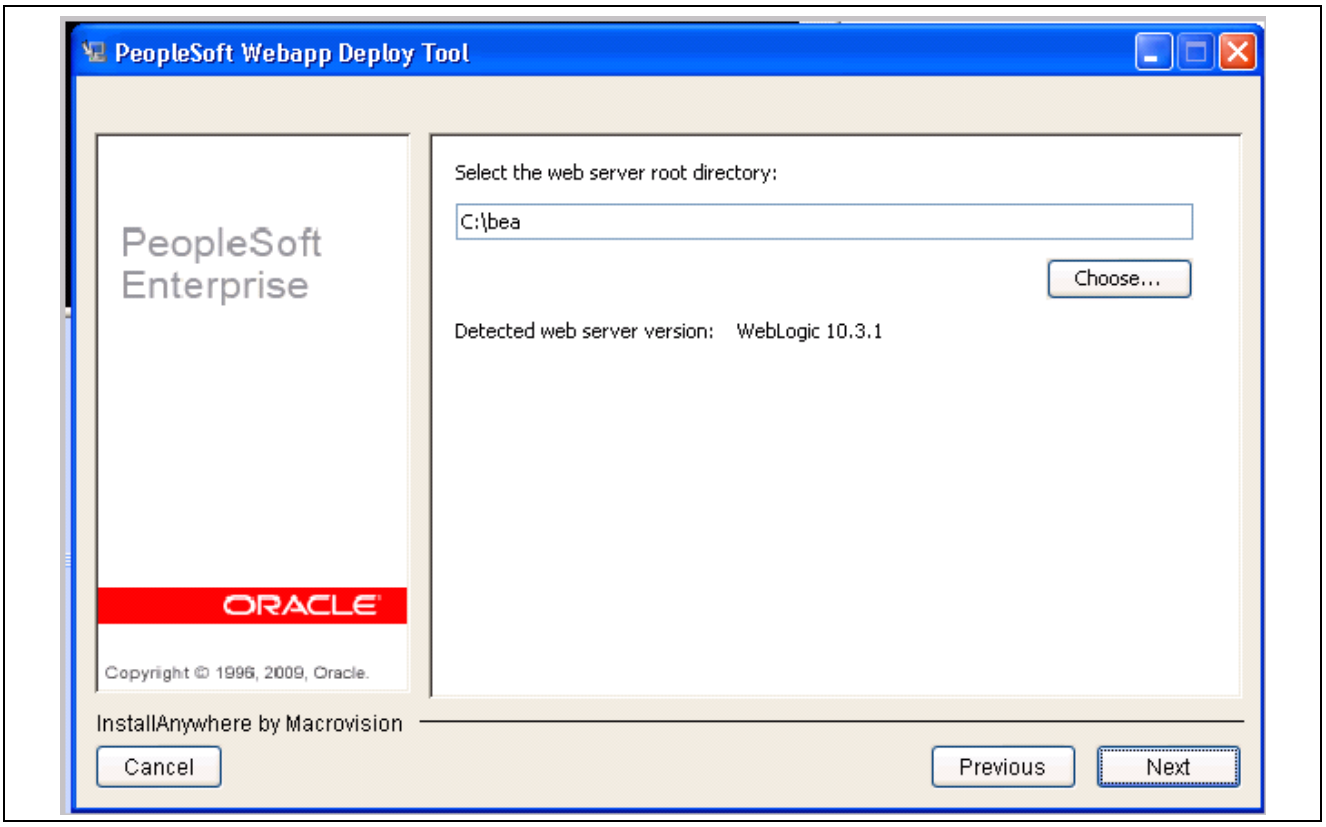

PeopleSoft Webapp Deploy: Server Root Directory page

6. Click Next. The Oracle WebLogic login information page appears, as shown in the following example:

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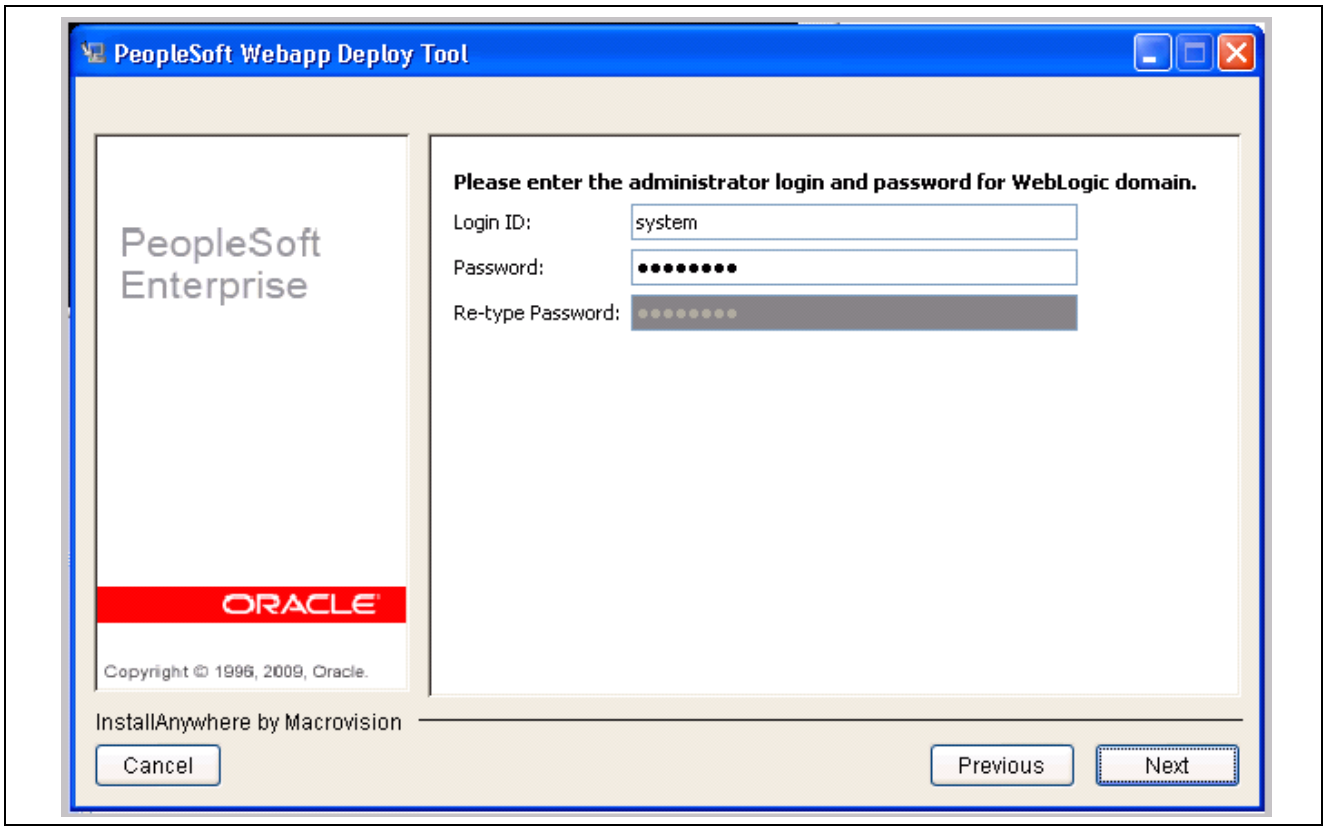

PeopleSoft Webapp Deploy: Oracle WebLogic Login Information page

7. On the Oracle WebLogic login information page, enter the login ID and enter *Passw0rd* in the Password field for the Oracle WebLogic domain. Click Next.

   The Application name selection page appears, as shown in the following example:

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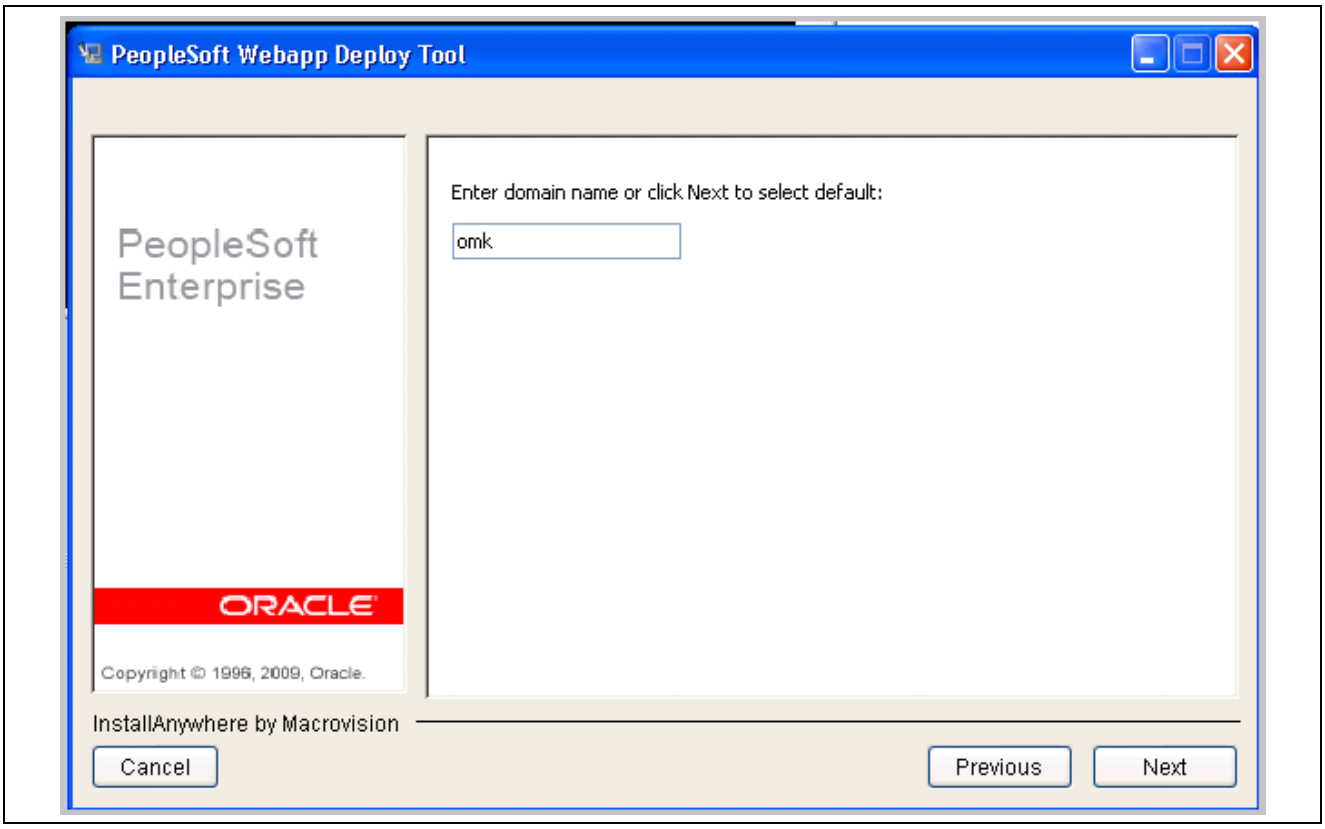

PeopleSoft Webapp Deploy: Oracle Domain page

8. On the Application name selection page, enter your new domain name; for example, omk, and click Next.

Important! Do not use the same names that you used for your PeopleSoft web server domains.

The Install Configuration selection page appears, as shown in the following example:

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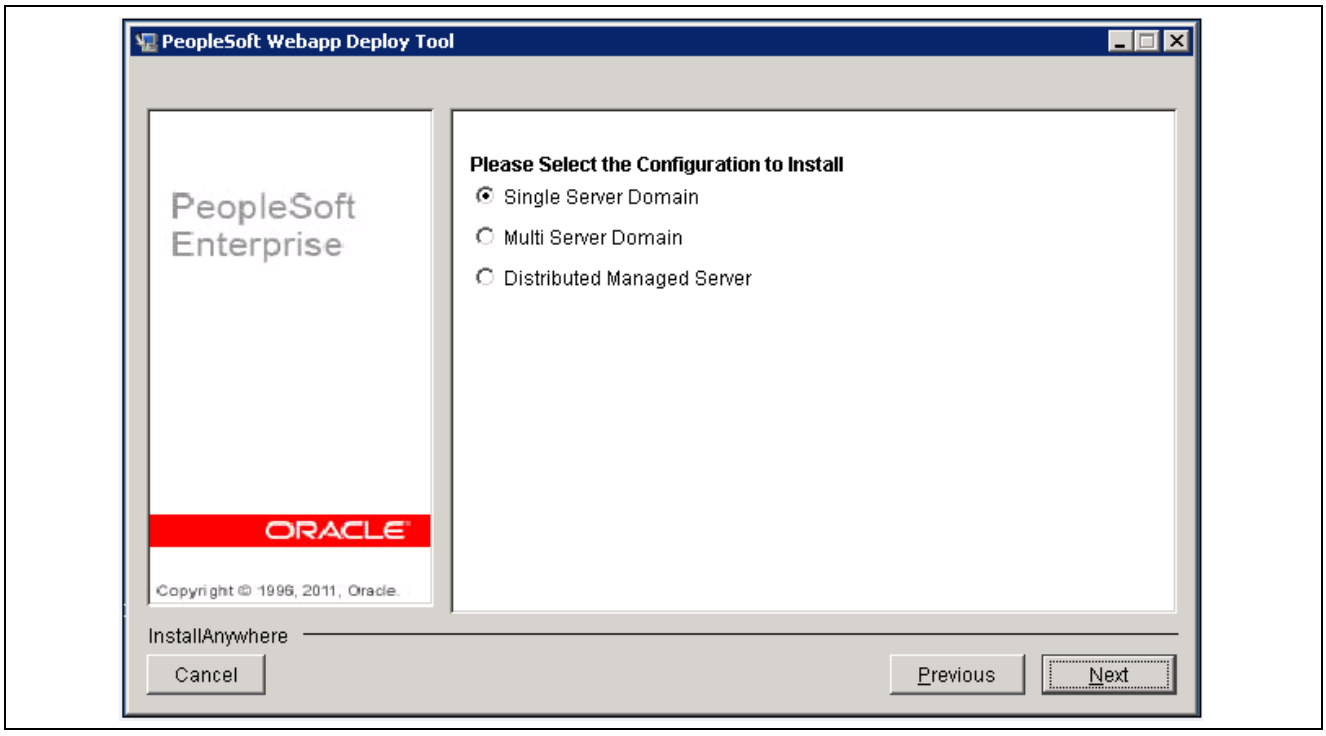
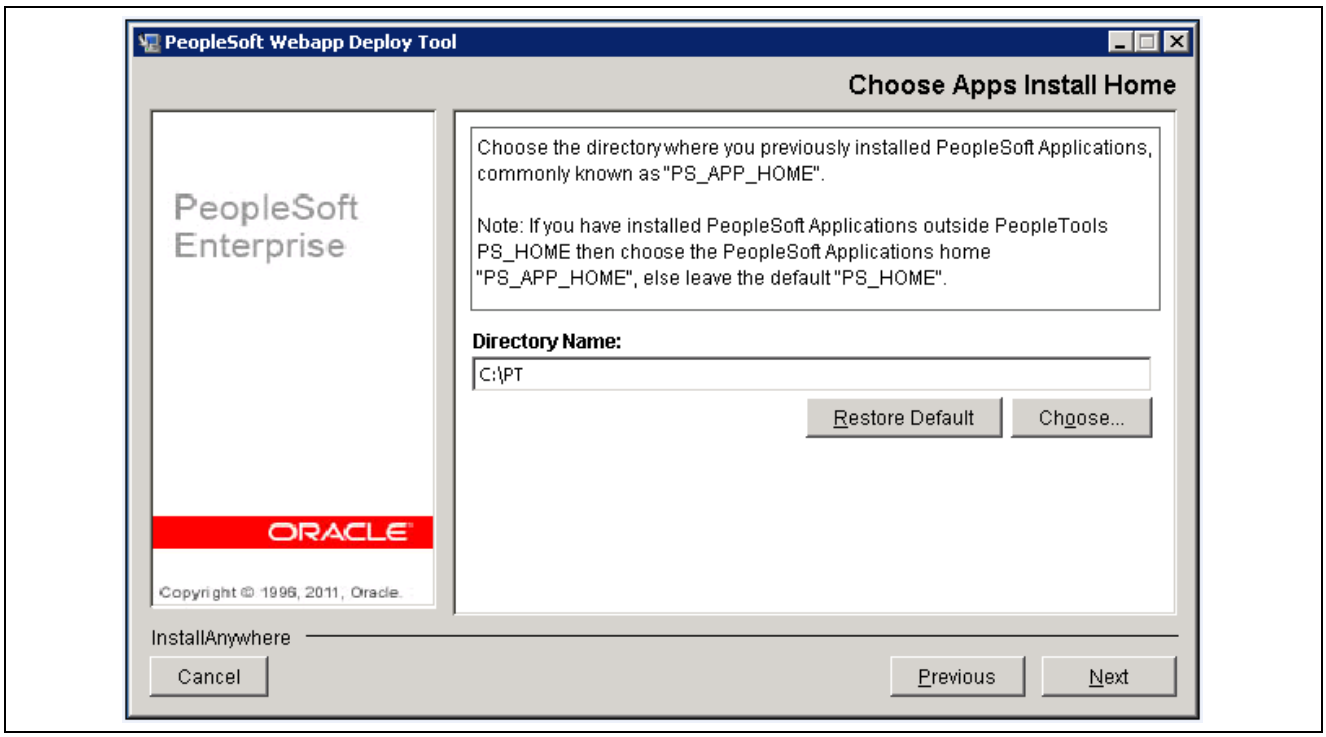


PeopleSoft Webapp Deploy: Install Configuration page

9. On the Install Configuration selection page, select one of the install configuration options and click Next.

   The Apps Install Home selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Apps Install Home page

10. On the Apps Install Home selection page, enter *PS_APP_HOME* directory in Directory Name field. This is same location where you installed PeopleSoft CRM application. Then click Next.

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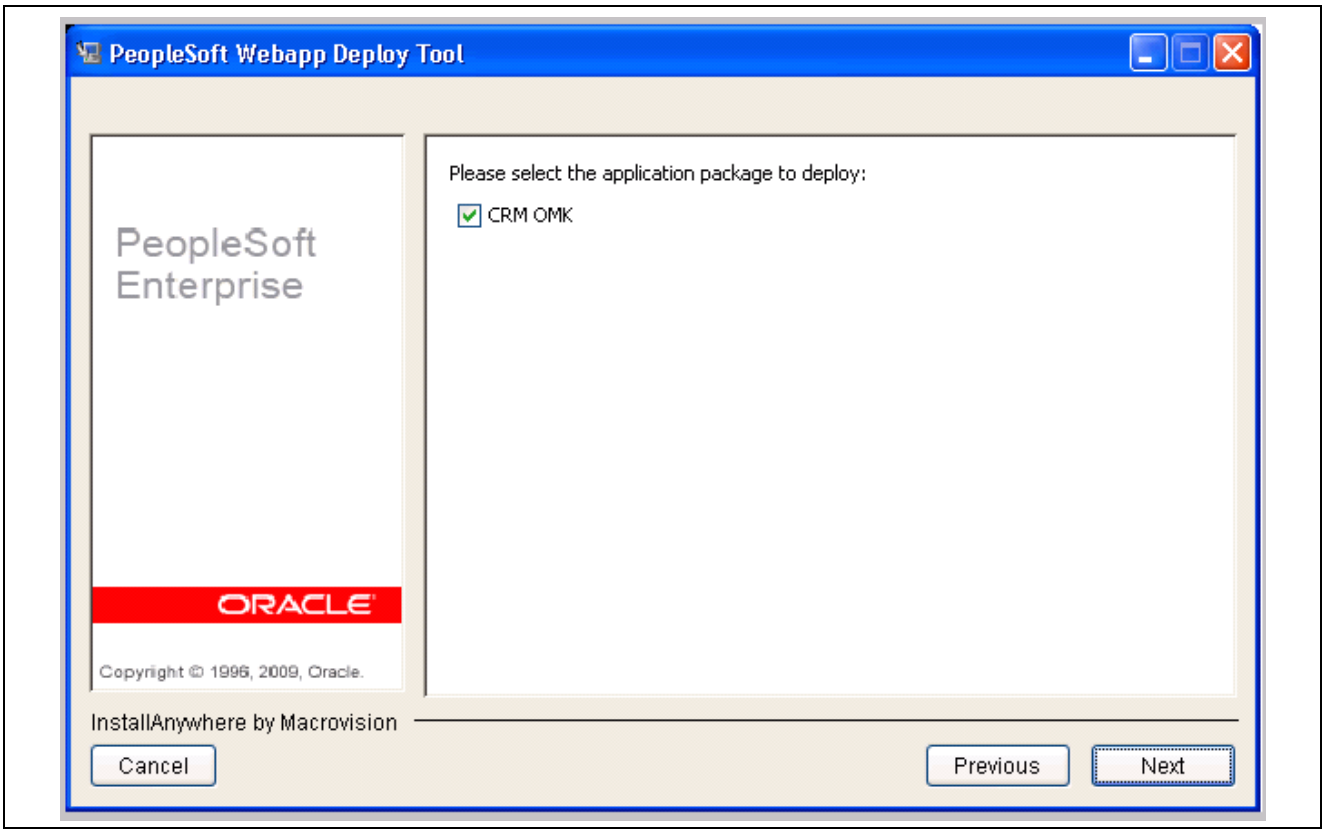
The Application package selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy: Application Package Selection page

11. On the Application package selection page, select *CRM OMK* as the application package to deploy and click Next.

    The PeopleSoft CRM database information page appears, as shown in the following example:

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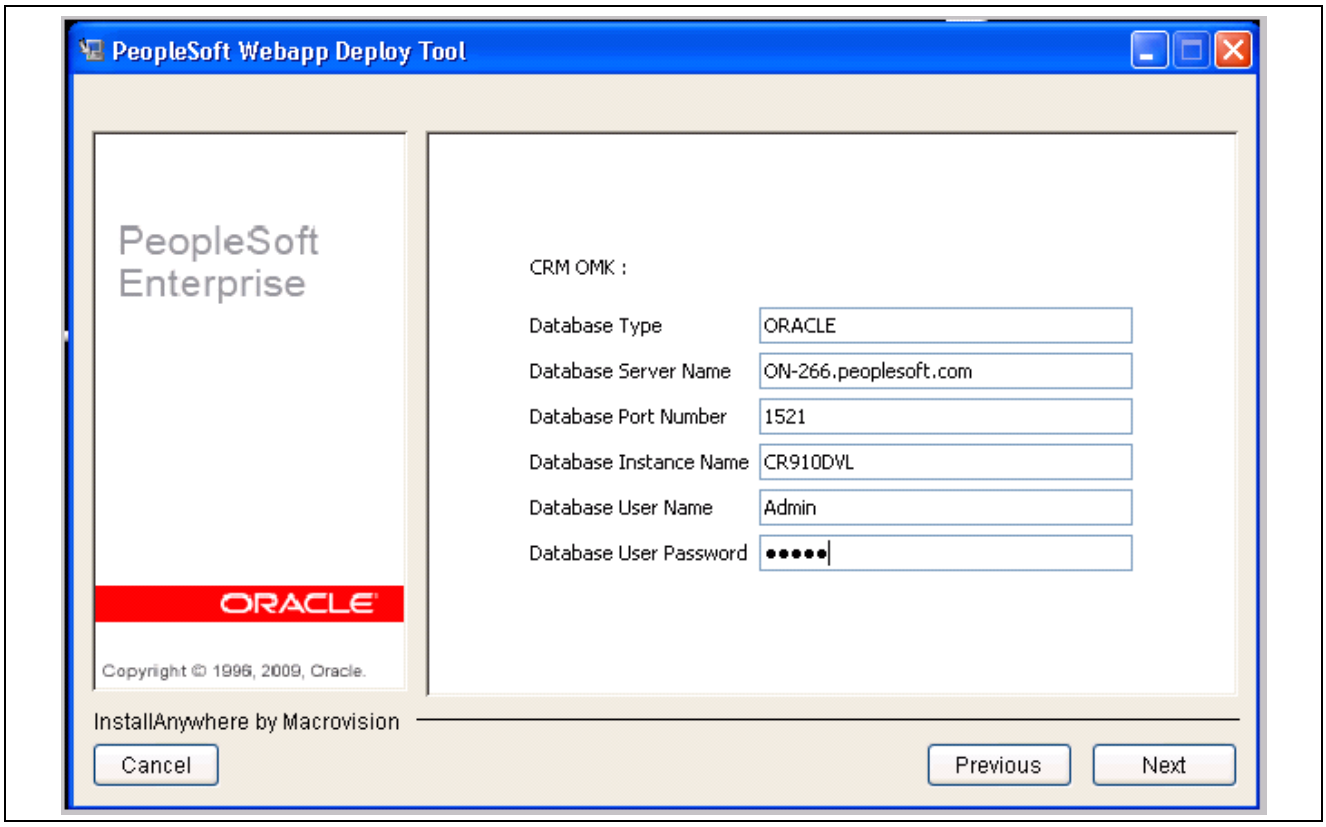

PeopleSoft Webapp Deploy: Database Information page

12. Complete the PeopleSoft CRM database information page using the following instructions:
    - In the Database Type field, select *ORACLE*, *MSSQL*, or *DB2UDB*.
    - In the Database Server Name field, enter the name of the machine that is hosting the database.
    - The Database Port Number value can differ depending on your database server configuration. Consult your database administrator to determine the correct value for your configuration.

    Note. For MSSQL2008 *Only*. On the server where the database is running, check the port by opening SQL Server Configuration Manager, Protocols for SQL2008, and select the Properties of TCP/IP. In the tab IP addresses, set the TCP Port in section IPAll to *1433* (replace with actual port number on your site, if 1433 is the not the default SQL2008 port selected). Consult your database administrator to determine the correct value for your configuration and for further information.

    - In the Database Instance Name field, enter the name of the database.
    - In the Database User Name field, enter the name of the database user.
    - In the Database User Password field, enter the password of the database user.
13. Click Next. The DES HTTP/HTTPS port selection page appears, as shown in the following example:

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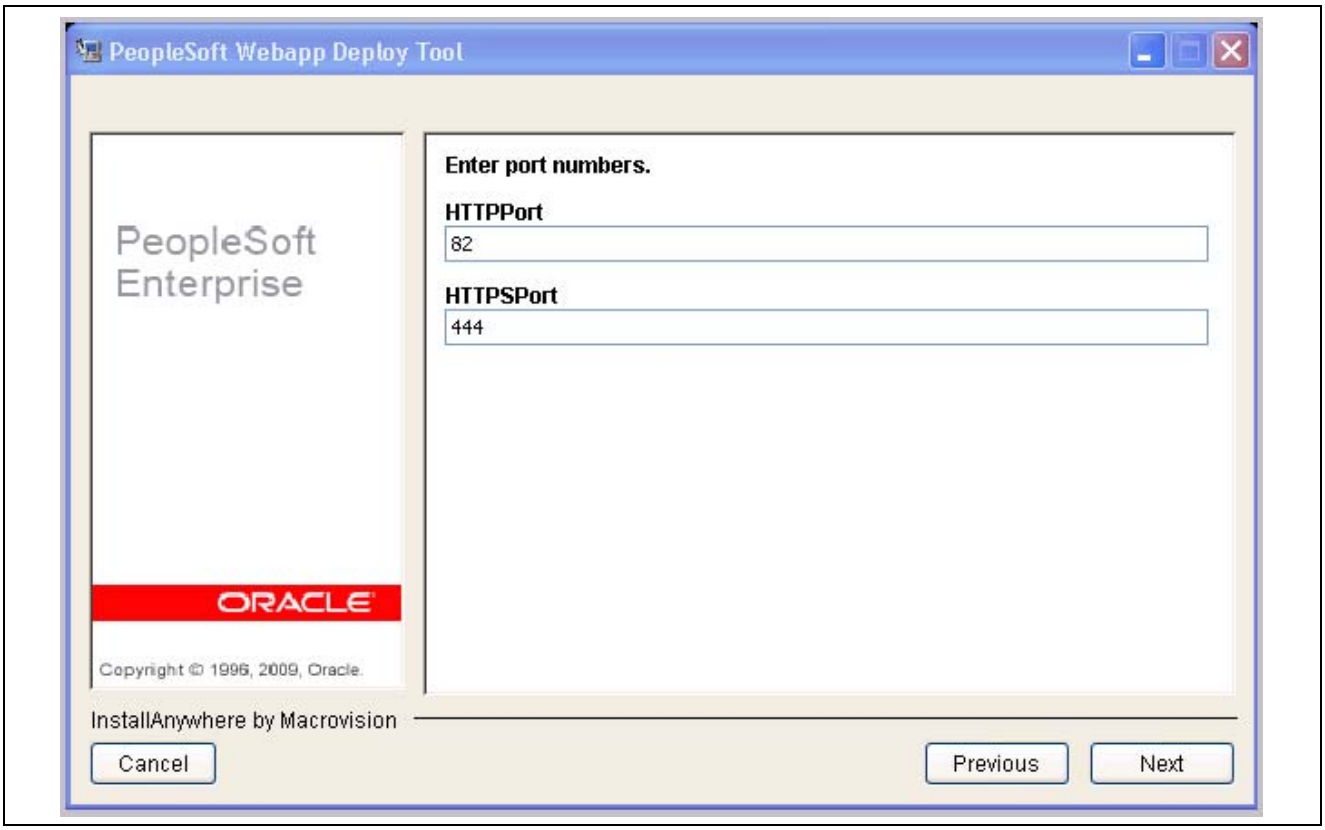

PeopleSoft Webapp Deploy: Port Numbers page

14. On the DES HTTP/HTTPS port selection page, enter the DES HTTP and HTTPS port numbers.

    Important! This port number must be different from your PeopleSoft Pure Internet Architecture port number.

15. Click Next. The installation Summary page appears, as shown in the following example:

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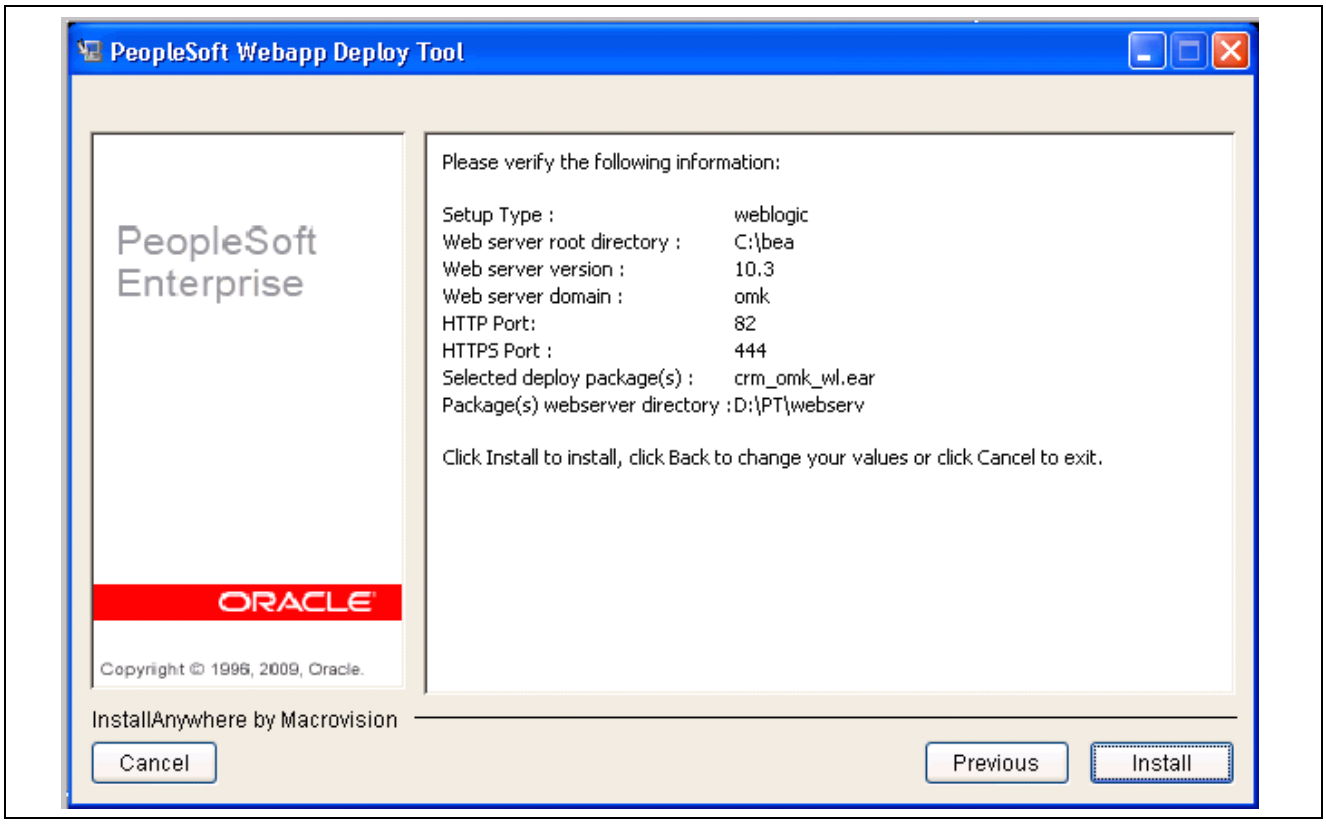

PeopleSoft Webapp Deploy: Summary page

16. Verify that the information is correct.

    If the information is not correct, click Previous and make the necessary corrections.

17. Click Install to start the installation.

    Note. This process may take up to five minutes. If it does not complete within five minutes, check the DES0_stderr.log file in the DES installation directory for errors or information (for example, *PS_CFG_HOME*\webserv\omk\DES\DES0.stderr.log).

18. Click Finish to exit the installation.

Task 3-7-2: Installing the DES on Oracle WebLogic on UNIX

To install the DES application on an Oracle WebLogic server running on UNIX:

1. Shut down any Oracle WebLogic web server that is running.
2. Go to *PS_HOME*/setup/PsMpWebAppDeployInstall and run the appropriate setup command with these additional parameters:

   ```
   setup.sh
   ```

3. After the following messages appear, enter *1* to continue:

   ```
   InstallShield Wizard
   Initializing InstallShield Wizard...
   Searching for Java(tm) Virtual Machine.....
   Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
   ```

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```
Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on
 your computer.
Version: 8.52
```

Note. If you are installing on an Oracle WebLogic server, make sure you shut down any running web servers to avoid corrupting those web servers.

---

4. Select the directory where you installed the PeopleSoft application, commonly known as *PS_HOME*, as follows:

   ```
   Please specify a directory name or press Enter [/ds1/home/crm910db] e.g. /ds2
   /home/upgtest2/crm910db
   ```

5. Enter *1* to continue.
6. Enter *1* to select the IBM WebSphere Server:

   ```
   [X] 1 - Oracle WebLogic Server
   [ ] 2 - IBM WebSphere Server
   ```

7. Enter *0* to finish.
8. Enter *1* to continue.
9. Specify the web server root directory information.

   For example:

   ```
   /ds2/home/upgtest2/WLS1031
   Detected web server version: Weblogic 10.3.1
   ```

10. Enter *1* to continue.
11. Enter *1* to continue.
12. Specify the login ID and password, or press ENTER to accept the default:

    ```
    Login ID: [system]
    Password:  [Passw0rd
    ]
    Re-type password:  [Passw0rd
    ]
    ```

13. Enter *1* to select CRM OMK for the application package to deploy:

    ```
    [X]  1  -  CRM OMK
    ```

14. Enter the domain name or enter 0 to select the default [PSWebApp].
15. Enter *1* to continue.
16. Specify the CRM database information.

    For example:

    ```
    CRM OMK:
     Database Type: [MSSQL]  ORACLE
     Database Server Name: []  an-ibm007
     Database Port Number: [0]  1521
    ```

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```
Database Instance Name: []  C890T208
Database User Name: [Admin]  SYSADM
Database User Password: []  SYSADM
```

17. Enter *1* to continue.
18. Enter the appropriate HTTP and HTTPS port numbers for the DES server.

    Important! The HTTP and HTTPS port numbers must be different from your PeopleSoft Pure Internet Architecture port number.

    For example:

    ```
    HTTP Port:  [80] 8007
    HTTPS Port:  [443]
    ```

19. Enter *1* to continue.
20. Review and confirm your selections before deploying the DES server.

    For example:

    ```
    Set up Type: Weblogic
    Web server root directory: /ds2/home/upgtest2/bea81
    Web server version: 8.1
    Web server domain: PSWebApp
    HTTP Port:  8007
    HTTPS Port: 443
    Selected deploy package(s):
    Package(s) web server directory: /ds2/home/upgtest2/c890t208/webserv
    ```

21. Enter *1* to deploy.

Task 3-7-3: Modifying the setEnv.sh

To modify the setEnv.sh after the installation completes:

1. Go to *PS_CFG_HOME/webserv/omk_domain/bin - vi setEnv.sh*.
2. Append *:${PS_CFG_HOME}/webserv/${DOMAIN_NAME}/lib/xalan.jar* to *PSCLASSPATH=*

   It will become:

   PSCLASSPATH=${PS_CFG_HOME}/webserv/${DOMAIN_NAME}/lib/ptib.jar:${PS_CFG_HOME}/webserv/${DOMAIN_NAME}/lib/psjoa.jar:${PS_CFG_HOME}/webserv/${DOMAIN_NAME}/lib/xalan.jar

Task 3-7-4: Starting the DES on an Oracle WebLogic Server

Start the DES application as follows:

- On Microsoft Windows, start the DES application on an Oracle WebLogic Server by entering the following in the Command Window:

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```
%PS_CFG_HOME%\webserv\<domain name>\bin\startPSWEBAPPS.cmd
```

- On UNIX, start the DES application on an Oracle WebLogic Server by entering the following in the Command Window:

```
>cd PS_CFG_HOME/webserv/<domain name>/bin
>startPSWEBAPPS.sh
```

Task 3-8: Installing the DES on an IBM WebSphere Server

This section discusses:

- Understanding DES Installation on IBM WebSphere
- Installing the DES on IBM WebSphere on MS Windows
- Installing the DES on an IBM WebSphere for UNIX
- Starting the DES on an IBM WebSphere Server

Understanding DES Installation on IBM WebSphere

You cannot use an existing PeopleSoft Pure Internet Architecture server or application on IBM WebSphere for the Dialog Execution Server (DES). Also, you cannot use the same PeopleSoft Pure Internet Architecture HTTP/HTTPS port number for the DES HTTP/HTTPS port number.

Task 3-8-1: Installing the DES on IBM WebSphere on MS Windows

To install the DES application on an IBM WebSphere server running on Microsoft Windows:

1. Go to *PS_HOME*\setup\PsMpWebAppDeployInstall and run setup.bat.

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

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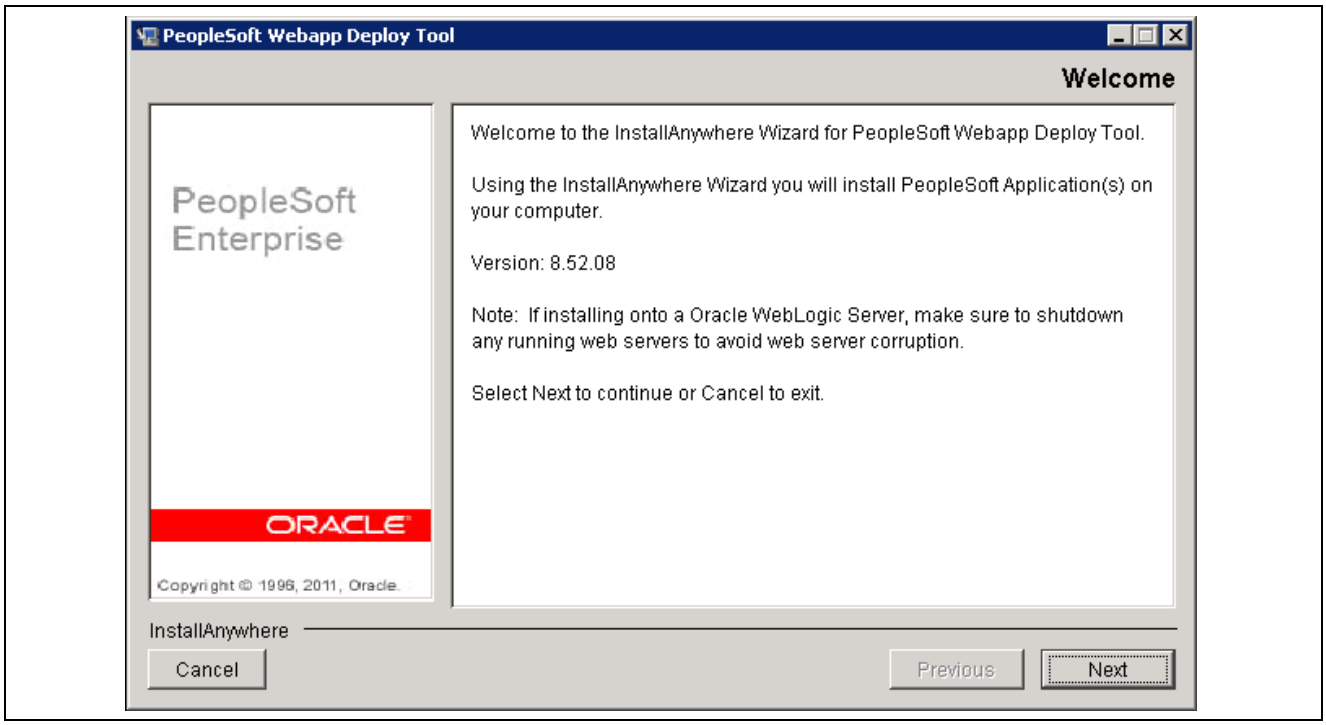
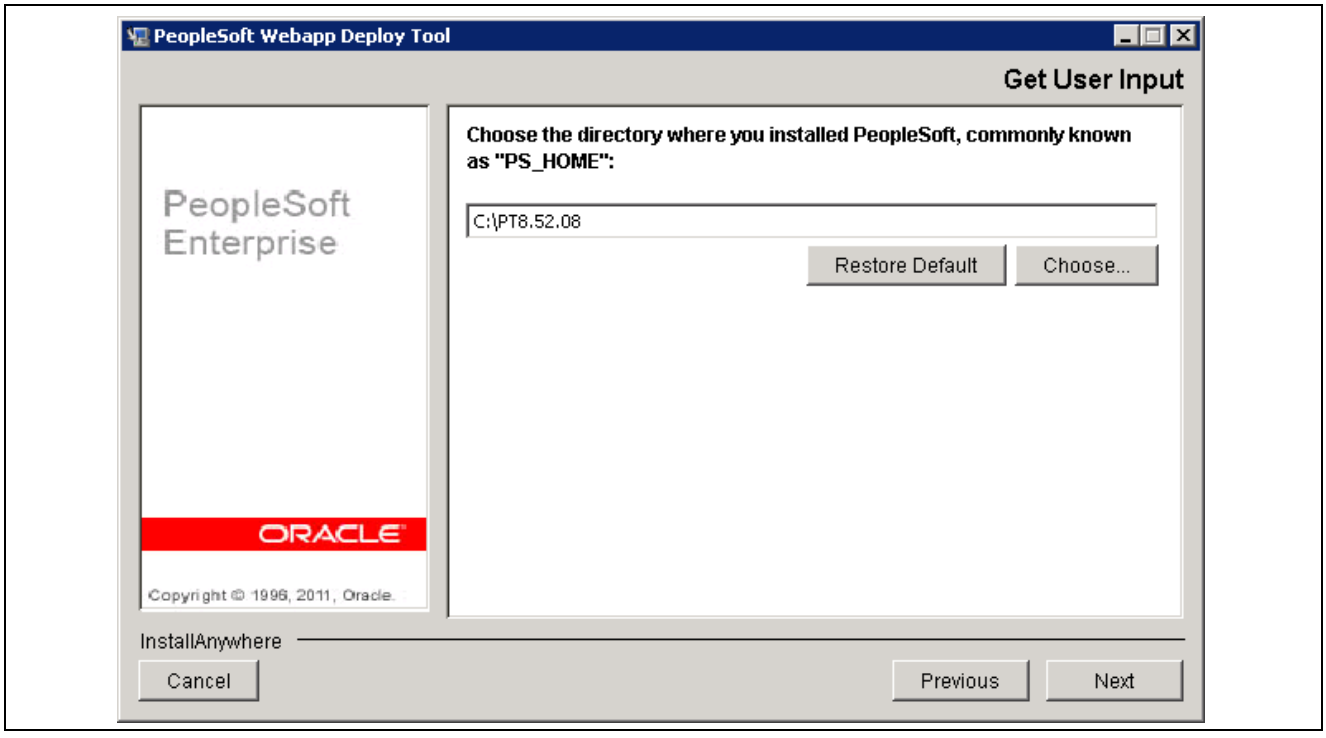


PeopleSoft Webapp Deploy Tool: Welcome page

2. On the PeopleSoft Webapp Deploy welcome page, click Next.

   The PeopleSoft PeopleTools home directory selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy Tool: PS_HOME directory selection page

3. On the PeopleSoft PeopleTools directory selection page, enter the *PS_HOME* directory and click Next.

   The Web server selection page appears, as shown in the following example:

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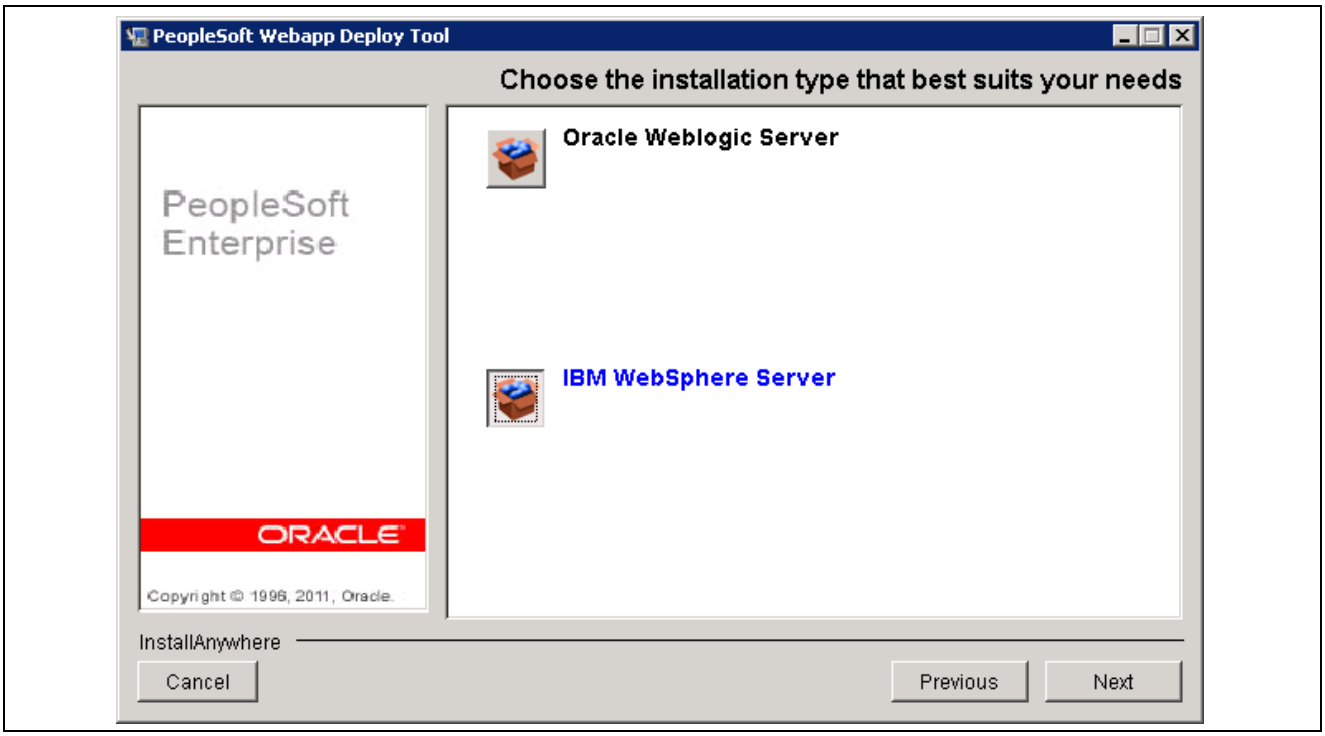
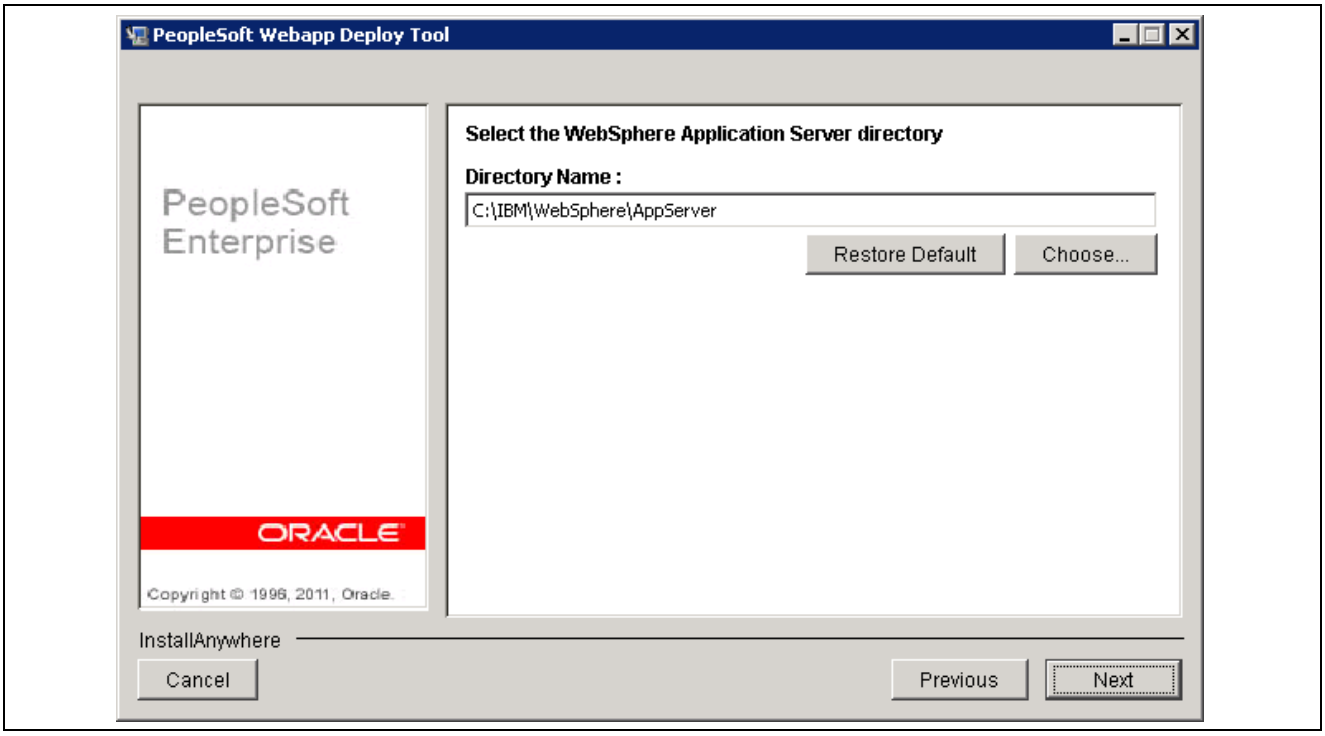


PeopleSoft Webapp Deploy Tool: Web server selection page

4. On the web server selection page, select the IBM WebSphere Server option, and click Next.

   The WebSphere Application Server directory page appears, as shown in the following example:



PeopleSoft Webapp Deploy Tool: WebSphere Application Server directory page

5. In the WebSphere Application Server directory page, enter the IBM WebSphere Application Server directory, *C:\IBM\WebSphere\AppServer* in the Directory Name field.

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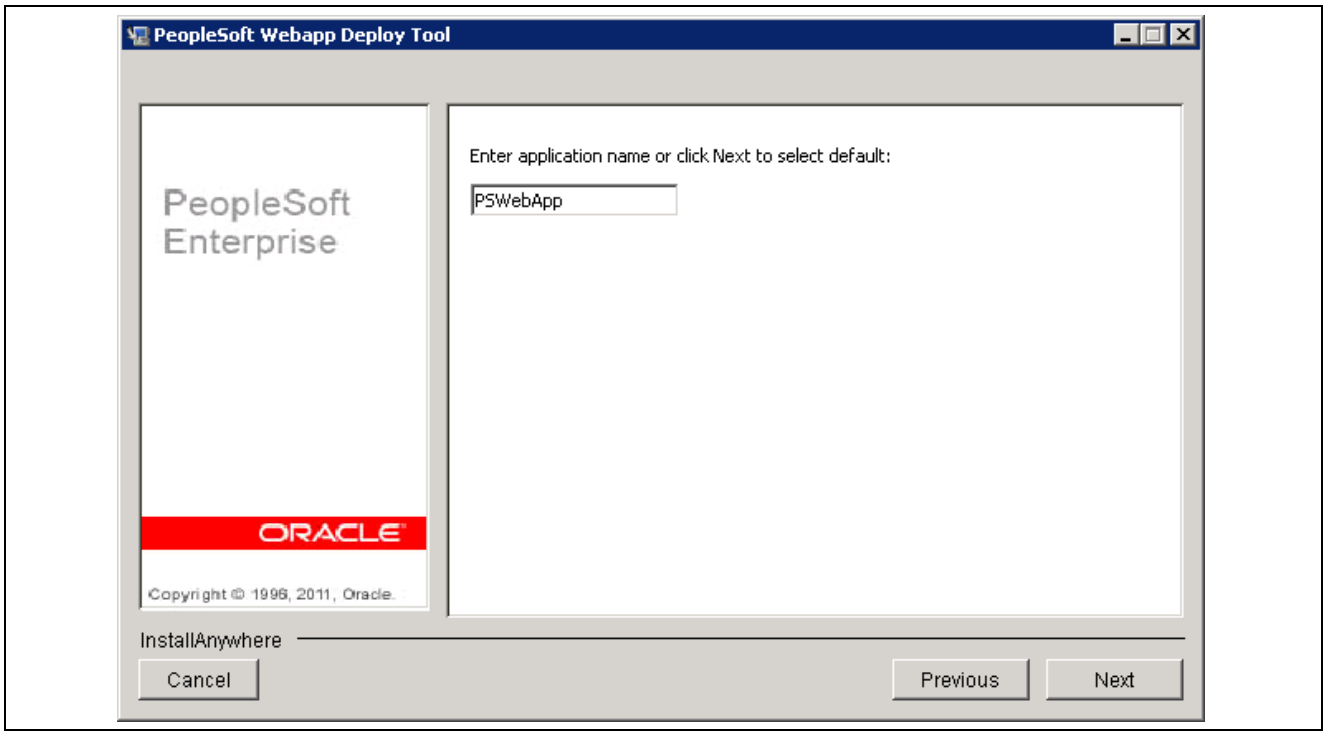
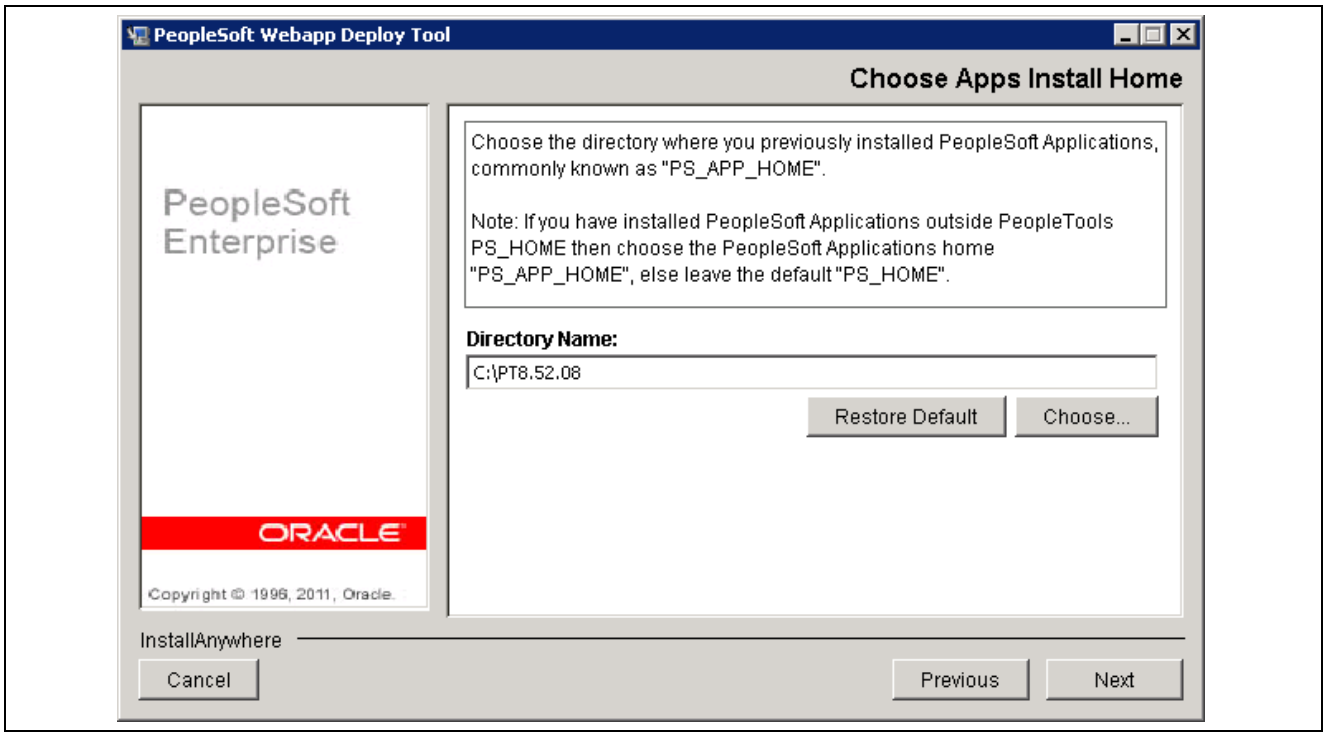
Click Next. The application name selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy Tool: Application Name Selection page

6. On the application name selection page, enter the application name and click Next.

   The Choose Apps Install Home page appears, as shown in the following example:



PeopleSoft Webapp Deploy Tool: Choose Apps Install Home page

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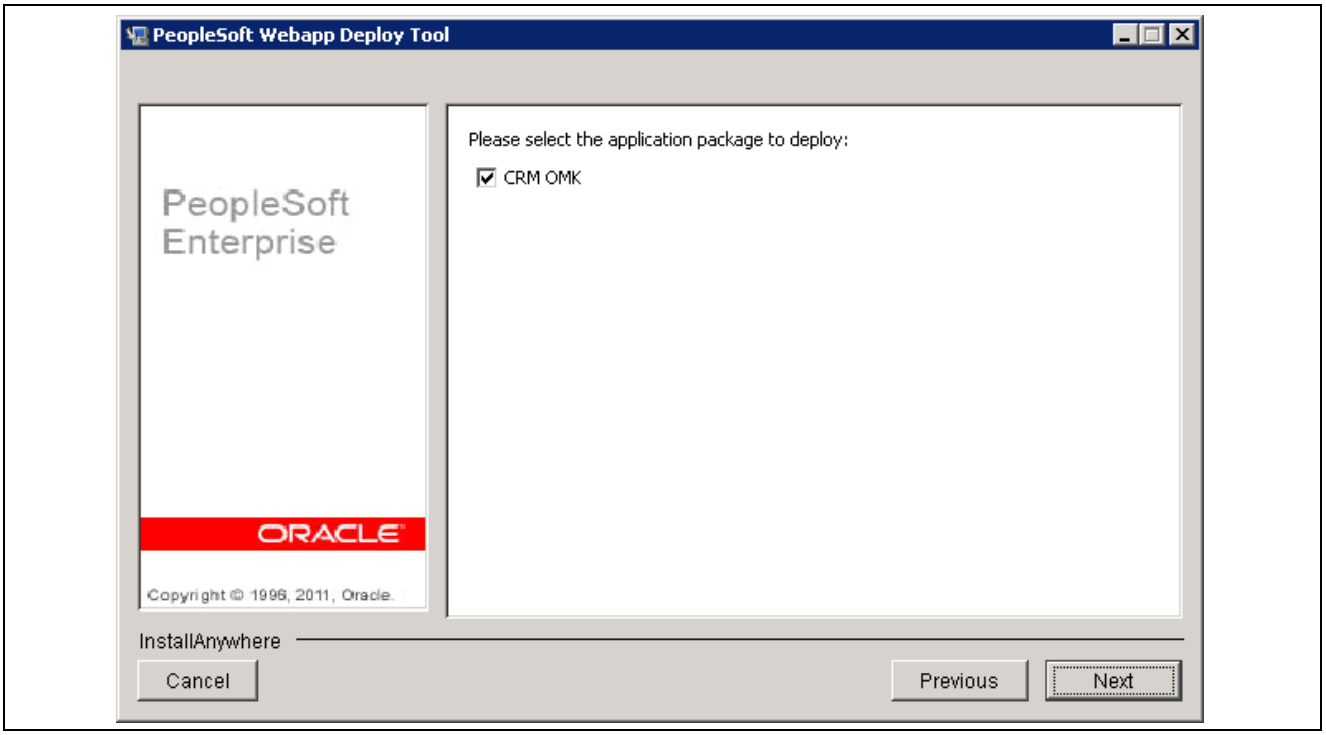
7. In the Choose Apps Install Home page, enter the location of PeopleSoft Application install home in the Directory Name field.

   This directory is commonly known as PS_APP_HOME. Modify the directory name to reflect your PS_APP_HOME installation path, which is the high level directory where you installed the PeopleSoft Application software.

   Note. The Choose Apps Install Home window shown above has PeopleSoft PeopleTools PS_HOME location as the default directory. Modify that location to reflect your PS_APP_HOME installation path only if you have the PeopleSoft Application software installed outside the PeopleSoft PeopleTools PS_HOME.

8. After entering the directory name, click Next. The application package to depoly selection page appears, as shown in the following example:



PeopleSoft Webapp Deploy Tool: Application package to deploy selection page

9. On the application package selection page, select the CRM OMK check box option as the application package to deploy and click Next. The CRM Database information page appears, as shown in the following example:

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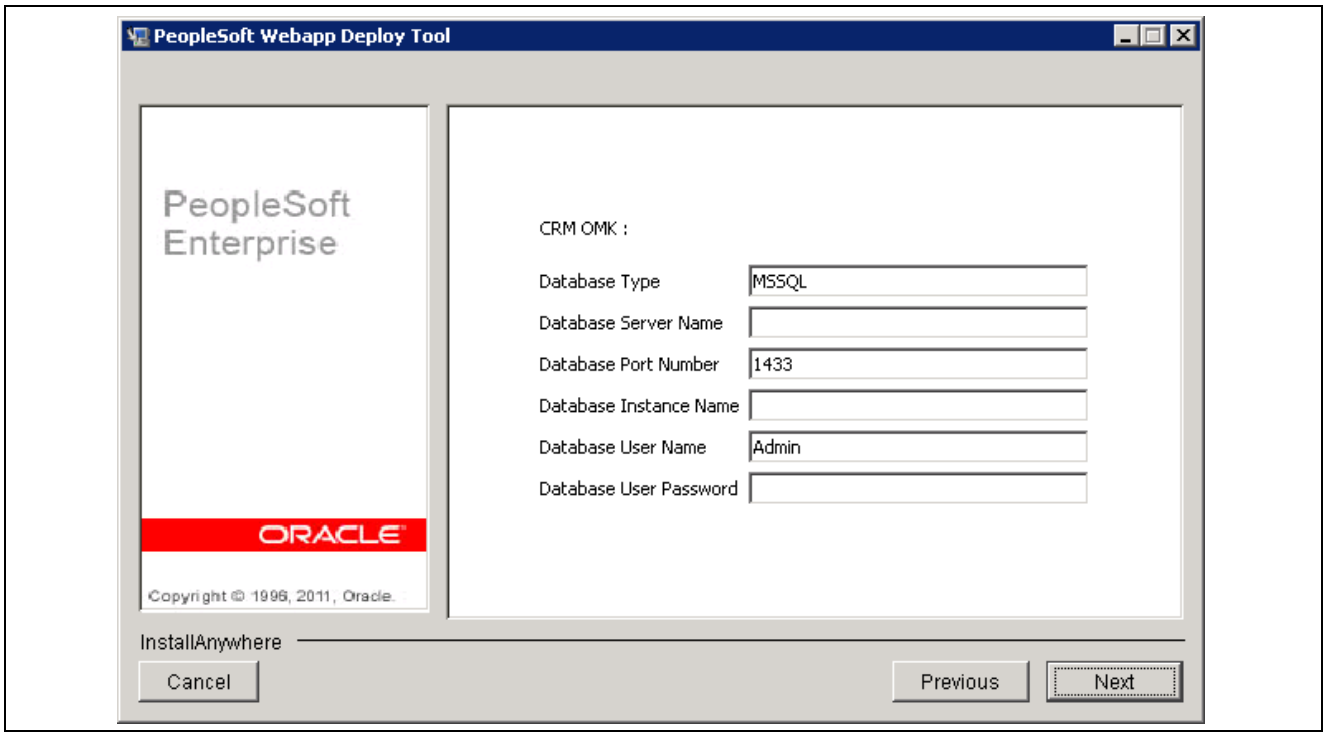

PeopleSoft Webapp Deploy Tool: Database Information page

10. Complete the CRM database information page, as follows:
    - In the Database Type field, enter *ORACLE*, *MSSQL*, or *DB2UDB*.
    - In the Database Server Name field, enter the name of the machine that is hosting the database.
    - The Database Port Number value can differ depending on your database server configuration. Consult your database administrator to determine the correct value for your configuration.

    Note. For MSSQL2008 Only. On the server where the database is running, check the port by opening SQL Server Configuration Manager, Protocols for SQL2008, and select the Properties of TCP/IP. In the tab IP addresses, set the TCP Port in section IPAll to 1433 (replace with actual port number on your site, if 1433 is the not the default SQL2008 port selected). Consult your database administrator to determine the correct value for your configuration and for further information.

    - In the Database Instance Name field, enter the name of the database.
    - In the Database User Name field, enter the name of the database user.
    - In the Database User Password field, enter the password of the database user.
11. After entering all the required Database Information; click Next. The DES HTTP/HTTPS port selection page appears, as shown in the following example:

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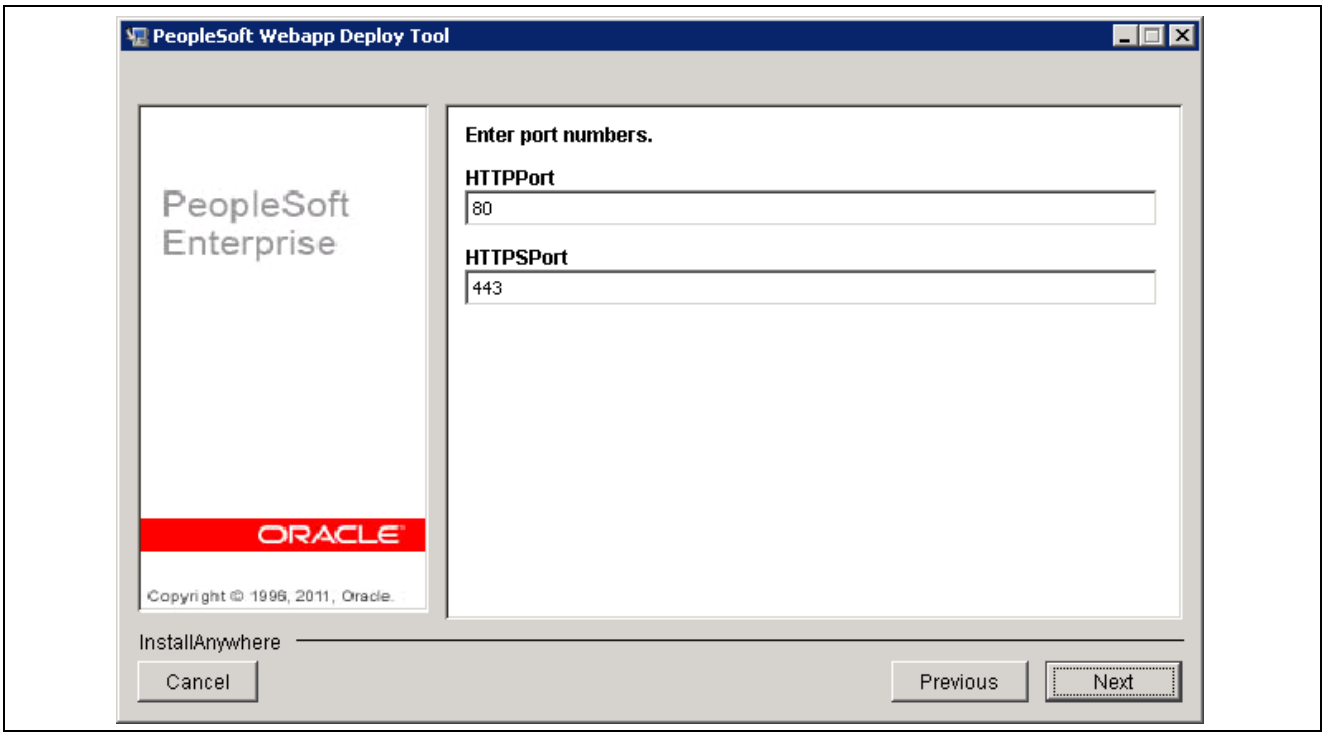
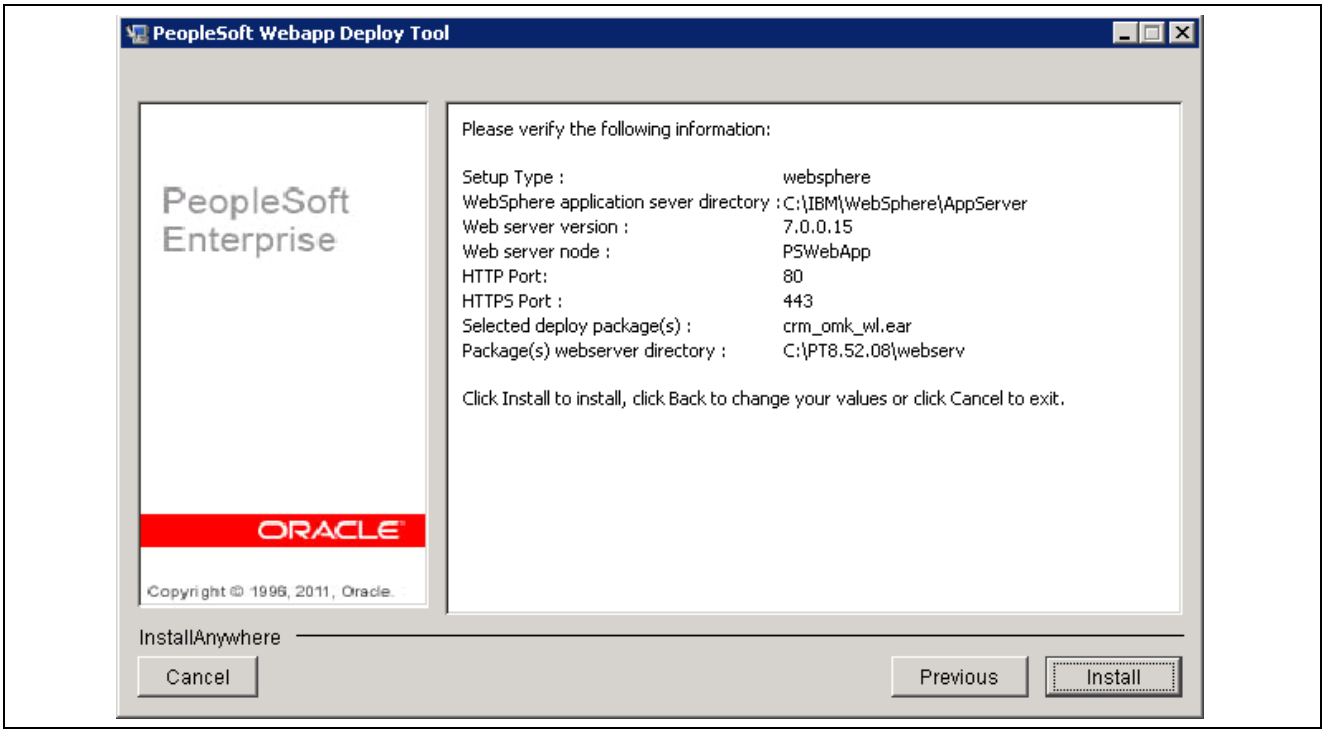


PeopleSoft Webapp Deploy Tool: Database Information page

12. On the DES HTTP/HTTPS port selection page, enter the DES HTTP and HTTPS port numbers and click Next.

    The installation Summary page appears, as shown in the following example:



PeopleSoft Webapp Deploy Tool: Summary page

13. Verify that the information is correct.

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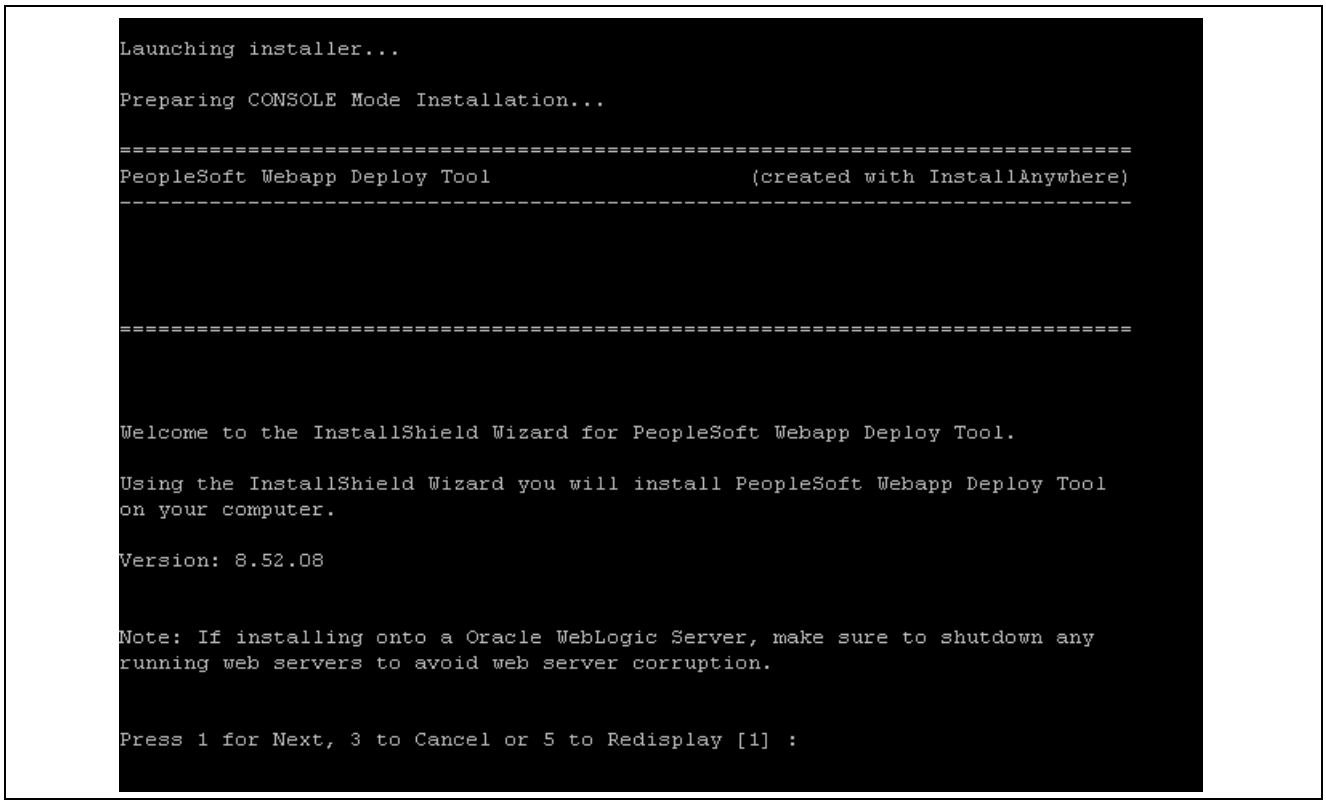
If the information is not correct, click Previous and make the necessary corrections.

14. Click Install to start the installation.
15. Click Done to exit the installation.

Task 3-8-2: Installing the DES on an IBM WebSphere for UNIX

To install the DES application on an IBM WebSphere server running on UNIX:

1. Go to *PS_HOME*/setup/PsMpWebAppDeployInstall and run the setup.sh script. The following message appears as shown in the example:



PeopleSoft Webapp Deploy Tool on Unix: Welcome message of InstallShield Wizard for UNIX

Note. If you are installing onto an Oracle WebLogic Server, ensure that you shut down any running web servers to avoid web server corruption.

2. Enter *1* to continue. The following message appears as shown in the example:

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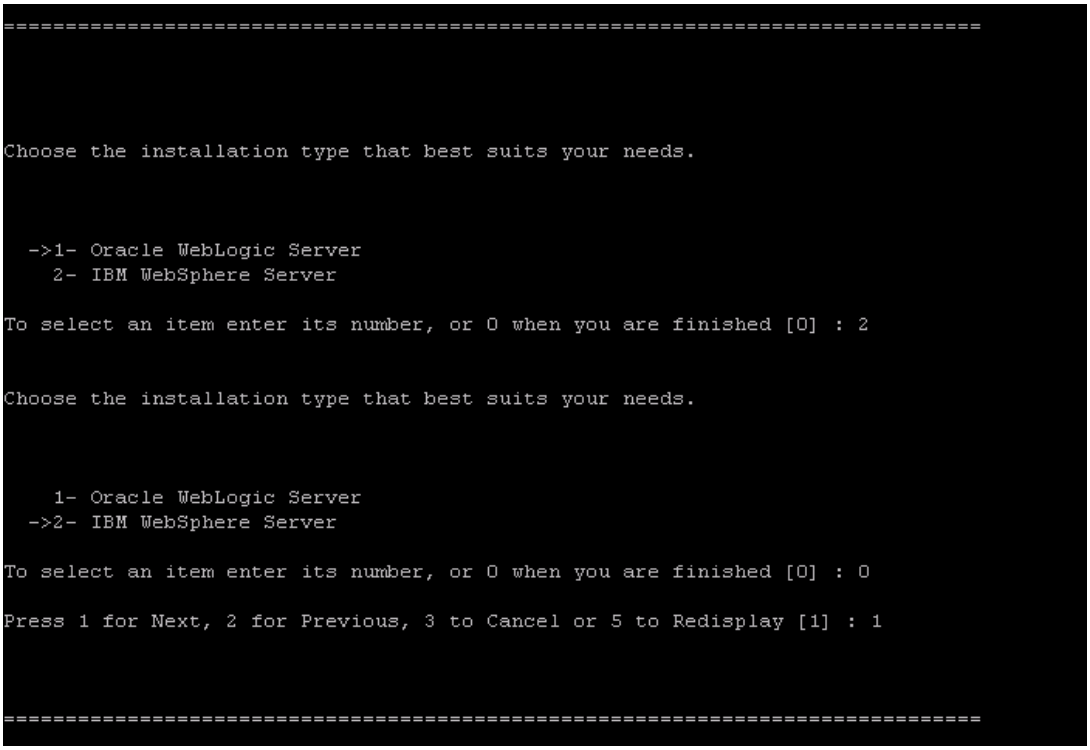
PeopleSoft Webapp Deploy Tool on Unix: PS_HOME directory selection message

3. Enter the directory where you installed PeopleSoft application, commonly known as “PS_HOME”.
4. Enter *1* to continue. The message to select webserver appears as shown in the example:



PeopleSoft Webapp Deploy Tool on Unix: WebServer selection message

5. Enter *2* to select IBM WebSphere Server.
6. Enter *0* to finish.
7. Enter *1* to continue. The message to select the WebSphere Application Server directory appears as shown in the example:

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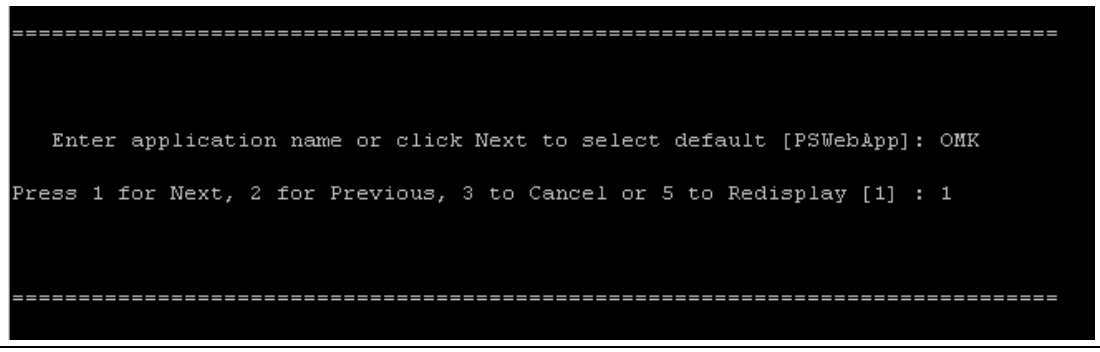
PeopleSoft Webapp Deploy Tool on Unix: WebServer application server directory message

8. Specify the location of the IBM WebSphere Application Server directory.
9. Enter *1* to continue. The message to enter application name appears as shown in the example:



PeopleSoft Webapp Deploy Tool on Unix: Application name message

10. Enter *1* to select default application and continue. Otherwise enter the application name.
11. Enter *1* to continue. The message to select PeopleSoft Application directory commonly known as *PS_APP_HOME*, appears as shown in the example:

PeopleSoft Webapp Deploy Tool on Unix: PeopleSoft Application directory message

12. Enter the directory where you previously installed PeopleSoft Applications.

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Note. If you have installed PeopleSoft Applications outside PeopleTools *PS_HOME*, then choose the PeopleSoft Applications home *PS_APP_HOME*, else leave the default *PS_HOME*.

13. Enter *1* to continue. The message to select the application package to deploy appears as shown in the example:

```
================================================================================


Please select the application package to deploy:



  ->1- CRM OMK

To select an item enter its number, or 0 when you are finished [0] :

Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] : 1


================================================================================
```

PeopleSoft Webapp Deploy Tool on Unix: PeopleSoft application package to deploy message

14. Enter to select CRM OMK for the application package to deploy.
15. Enter *0* to finish.
16. Enter *1* to continue. Specify the CRM database information as shown in the example:

```
================================================================================


CRM OMK :

   Database Type [MSSQL]: DB2UDB

   Database Server Name [ ]: an-ibm009

   Database Port Number [1433]: 80855

   Database Instance Name [ ]: crm910db

   Database User Name [Admin]: crm910db

   Database User Password [ ]:

Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] : 1


================================================================================
```

PeopleSoft Webapp Deploy Tool on Unix: Database Information message

17. Enter *1* to continue. The message to enter port numbers appear as shown in the example:

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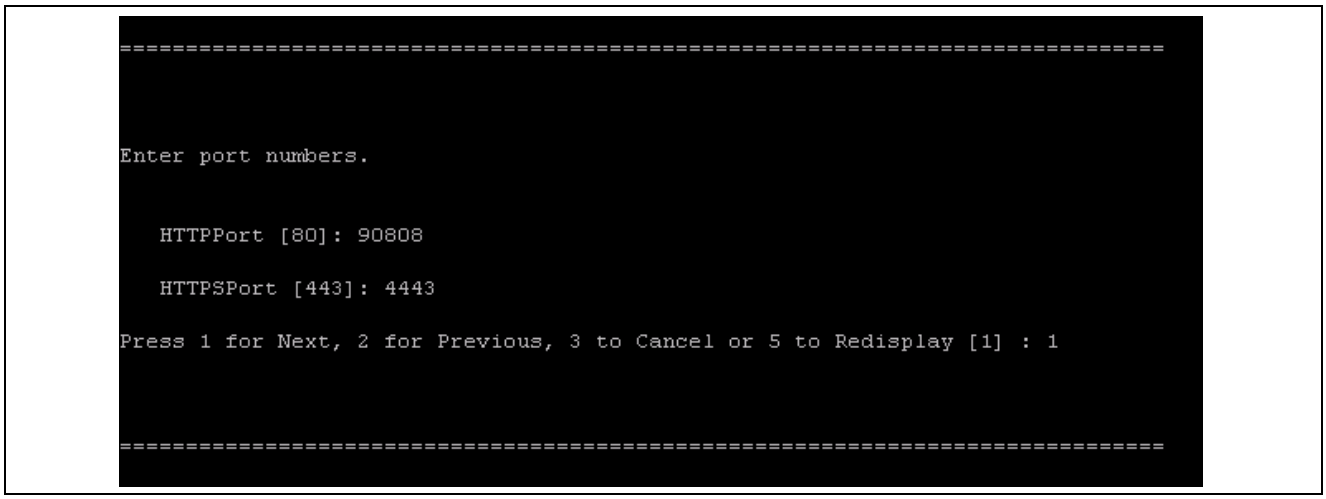
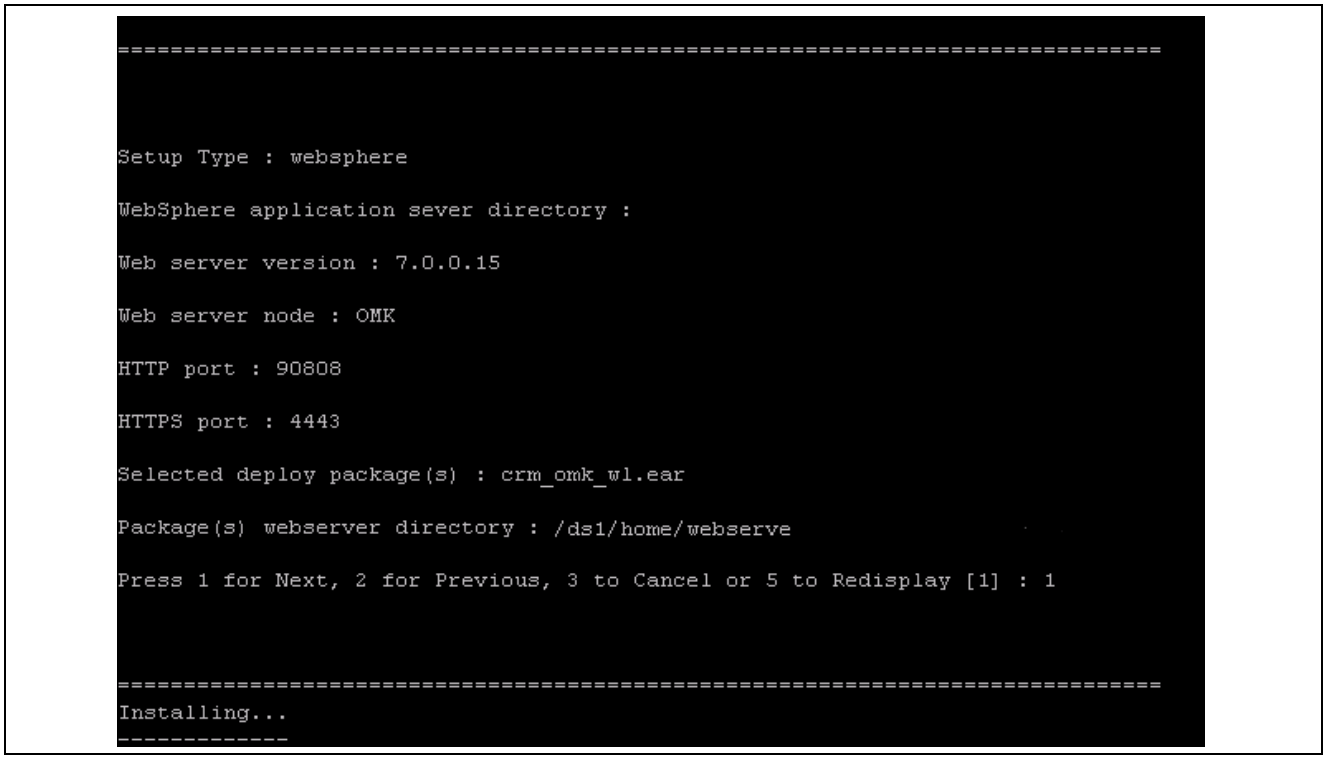


PeopleSoft Webapp Deploy Tool on Unix: Port Numbers Information message

18. Enter the appropriate HTTP/HTTPS port numbers for the DES server.

Important! The HTTP and HTTPS port numbers must be different from your PeopleSoft Pure Internet Architecture port number.

19. Enter *1* to continue. Summary message appears as shown in the example:



PeopleSoft Webapp Deploy Tool on Unix: Summary message

20. Review and confirm your selections before deploying the DES server.
21. Enter *1* to continue. The installation of DES server begins.
22. After the installation completes, a congratulation message appears as shown in the example:

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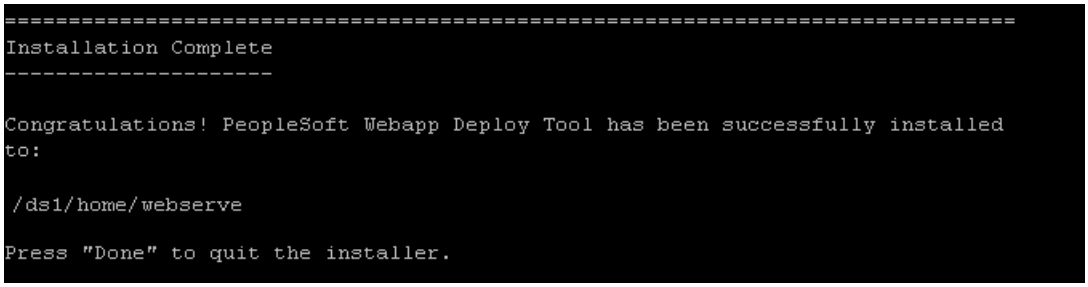

PeopleSoft Webapp Deploy Tool on Unix: Installation Complete message

23. Enter Done to quit the installer.

Task 3-8-3: Starting the DES on an IBM WebSphere Server

To start the DES application on an IBM WebSphere server, do one of the following:

- For IBM WebSphere on Microsoft Windows, enter the following in the Command Window:

  ```
  %WAS_HOME%\bin\startServer.bat <server name> -profileName <DOMAIN_NAME>
  ```

- For IBM WebSphere on UNIX, enter the following:

  ```
  <WAS_HOME>/bin/startServer.sh <server name> -profileName <DOMAIN_NAME>
  ```

Task 3-9: Retrieving and Installing JDBC Drivers

This section discusses:

- Downloading JDBC Drivers
- Installing JDBC Driver on the PeopleSoft Server
- Installing the JDBC Driver on the DES

Task 3-9-1: Downloading JDBC Drivers

Because PeopleSoft Online Marketing is a Java based application, you must obtain the relevant JDBC drivers from the install media of the database that you are using.

The following table lists the database and required files to assist you in identifying which files to copy from the install media:

Database	Required Files
Oracle 10g	ojdbc14.jar
Oracle 11g	ojdbc6.jar
IBM DB2 LUW	db2jcc.jar db2jcc_license_cu.jar db2jcc_license_cisuz.jar
Microsoft SQL server	sqljdbc4.jar

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Task 3-9-2: Installing JDBC Driver on the PeopleSoft Server

To install the JDBC driver for the PeopleSoft Application Server in the classes directory:

- For UNIX, copy the jar files into <*PS_APP_HOME*>/appserv/classes.
- For Microsoft Windows, copy the jar files into <*PS_APP_HOME*>\class.

Task 3-9-3: Installing the JDBC Driver on the DES

To install the JDBC driver on the DES:

Copy the jar files to the appropriate location, as shown in the following table:

DES Installed on	UNIX	Microsoft Windows
Oracle WebLogic	<*PS_CFG_HOME*>/webserv /<*DOMAIN_NAME*>/applications /crm/	<*PS_CFG_HOME*>\webserv \<*DOMAIN_NAME*>\applications \crm\
IBM WebSphere	<WAS_HOME>/profiles/<*DOMAIN_NAME*>/installedApps/<*DOMAIN_NAME*>NodeCell/crm.ear	<WebSphereInstallRoot>\lib

Note. Replace <*DOMAIN_NAME*> with your DES domain name. For example:*PSWebApp* or *omk*.

Task 3-10: Cybersource Credit Card Integration Configuration

In this task, you will perform Credit Card Integration Configuration prior to starting the DES. After you install the DES, you must perform the following manual configuration steps.

Note. You must perform the Customer Relationship Management (CRM) Credit Card setup before performing this task.

Refer to the task *Setting Up Cybersource SOAP Connectivity for PeopleSoft Pure Internet Architecture* in Chapter 1 of this installation document.

To perform CyberSource Credit Card Integration Configuration:

1. Configure the Merchant information in the CRM installation page, as shown in the following example:

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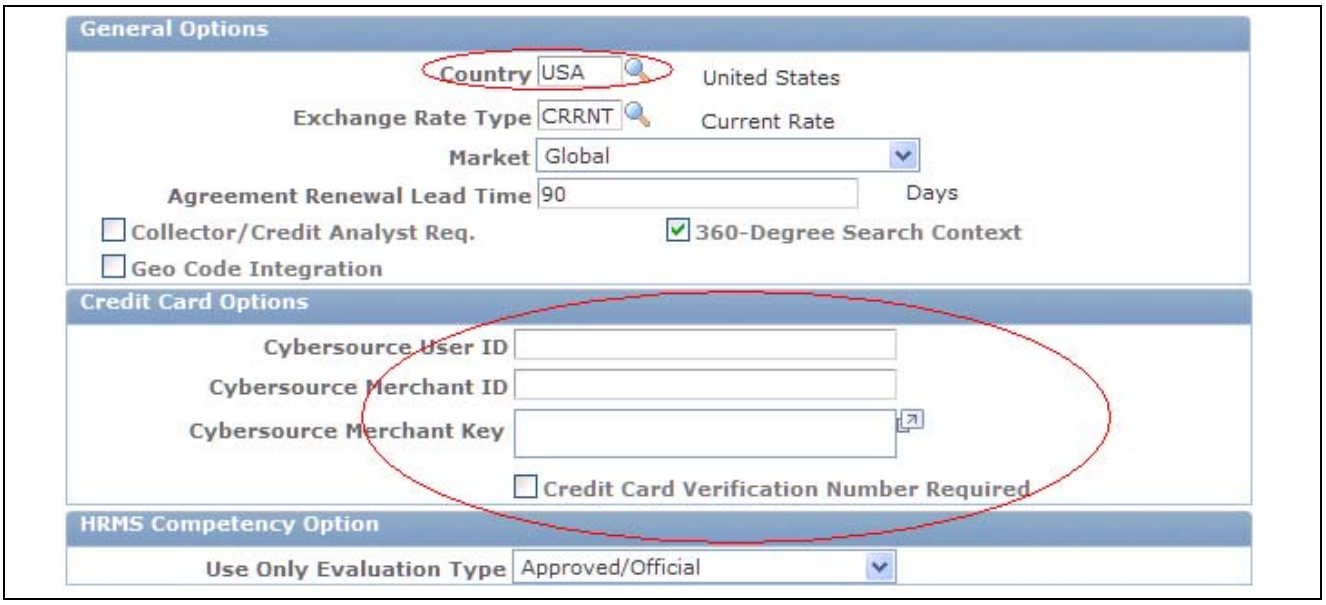


General Options: Merchant Information page

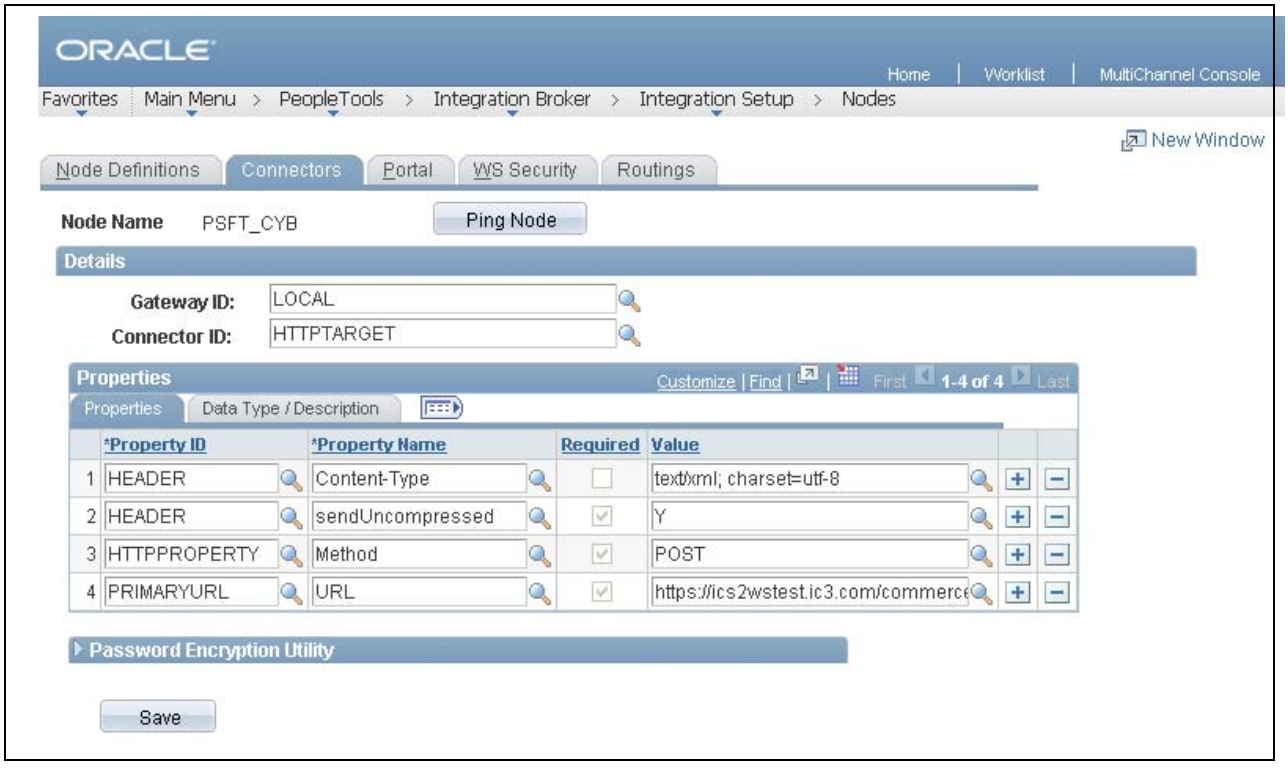
a. Select Set Up CRM, Install, Installation Options.

b. Enter the CyberSource User ID, CyberSourceMerchant ID, and CyberSourceMerchant key. These are required.

2. Configure the PeopleSoft Integration Broker:

a. Select PeopleTools, Integration Broker, Integration Setup, Nodes and open the node PSFT_CYB.

b. Click the Connectors tab to access the connectors page and configure the parameters as shown in the following example:



PSFT_CYB Node - Connectors page

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c. If the current system is a production system, the URL is:

```
https://ics2ws.ic3.com/commerce/1.x/transactionProcessor
```

Otherwise, please use the test environment.

```
https://ics2wstest.ic3.com/commerce/1.x/transactionProcessor
```

3. Configure the Cybersource Java Simple Order Client in DES:

a. If the DES server is installed behind a firewall, configure the proxy server in the *setEnv.cmd* file or the *setEnv.sh* file.

The following table lists the locations where the *setEnv.cmd* or *setEnv.sh* files can be found:

DES Installed On	UNIX	MICROSOFT WINDOWS
Oracle WebLogic	<*PS_CFG_HOME*>/webserv /<*DOMAIN_NAME*>bin	<*PS_CFG_HOME*>\webserv \<*DOMAIN_NAME*>bin
IBM WebSphere	<*PS__CFG_HOME*>/webserv /<*DOMAIN_NAME*>/installedApps /<*DOMAIN_NAME*>nodecell /<*DOMAIN_NAME*>.ear	<*PS_CFG_HOME*>\webserv \<*DOMAIN_NAME*>\installedApps \<*DOMAIN_NAME*>nodecell \<*DOMAIN_NAME*>.ear

Note. Replace <*DOMAIN_NAME*> with your DES domain name. For example: *PSWebApp* or *OMK*

Set the variable as shown here for Microsoft Windows:

```
SET ENABLE_HTTP_PROXY=true
SET HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>
SET HTTP_PROXY_HTTPPORT=<PROXY_PORT>
SET HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>
SET HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

Set the variable as shown here for UNIX:

```
export ENABLE_HTTP_PROXY=true
export HTTP_PROXY_HTTPHOST=<YOUR_PROXY_SERVER>
export HTTP_PROXY_HTTPPORT=<PROXY_PORT>
export HTTP_PROXY_HTTPSHOST=<YOUR_PROXY_SERVER>
export HTTP_PROXY_HTTPSPORT=<PROXY_PORT>
```

b. Cybersource should provide you with a sample SSL certificate file, for example, entrust_ssl_ca.cer. You must copy this file locally and register it as instructed in the next step.

c. Install the generic ssl security certificate to the DES webserver keystore directory. Go to directory:

For Oracle WebLogic: <*PS_CFG_HOME*>\webserv\<*DOMAIN_NAME*>\keystore

For IBM WebSphere: <*PS_CFG_HOME*> \webserv\<*DOMAIN_NAME*>\installedApps\<*DOMAIN_NAME*>nodecell\crm.ear\keystore

Run the command:

```
<PS_HOME>\jre\bin\keytool -importkeystore -destkeystore pskey -importcert-⇒
alias entrust_ssl_ca -file <PS_CFG_HOME>\webserv\<DOMAIN_NAME>\keystore⇒
\entrust_ssl_ca.cer -keypass password -keystore pskey -storepass password
```

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```
Trust this certificate? [no]:  yes
```

d. Restart the DES.

Task 3-11: Testing the DES Installation

Before you test the DES installation, you should stop the application server, clear the cache and restart the server. Then start the DES.

To test the DES installation, perform the following steps:

1. Test the communication to the server and verify that PeopleSoft OLM is installed.

   Go to http://<webserver>:<port>/DCS/mcp?rut=1.

   If the connection is working properly, the web page displays the message “i am here.”

2. Verify database connectivity with the web server.

   Go to http://<webserver>:<port>/DCS/mcp?rutdb=1.

   If the connection and the database is working properly, the web page displays the message “db: i am here.”

3. Verify JOLT connectivity with the web server. Also verify the Service Operation Handlers, *RY_XMSG_AREQ* and *RY_XMSG_SREQ* are active. If they are inactive, then:

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

   b. Search for the service operations and open them.

   c. Select Handlers tab.

   d. Select Status as *Active*.

   e. Click Save to save the status for the service operation.

      Go to http://<webserver>:<port>/DCS/mcp?rutas=1.

      If the connection and the application server is working properly, the web page displays the message as: “i am here.”

4. Verify FTP connectivity with the FTP server.

   Go to http://<webserver>:<port>/DCS/mcp?rutas=1.

   If the connection and the application server is working properly, the web page displays the message as: “i am here.”

   Go to http://<webserver>:<port>/DCS/mcp?rutftp=1.

   If the connection and the application server are working properly, the web page displays the message “ftp: i am here.”

5. Check for errors in the DES log files:

Note. For a DES UNIX installation, you should log into the machine using the same web server and application server user ID.

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- For IBM WebSphere, the log files reside in these directories:

  <*WAS_HOME*>\profiles\<*DOMAIN_NAME*>\installedApps\<*DOMAIN_NAME*>NodeCell\crm.ear\DES

  <*WAS_HOME*>\profiles\<*DOMAIN_NAME*>\installedApps\<*DOMAIN_NAME*>NodeCell\crm.ear\DES\log
- For Oracle WebLogic, the log files reside in these directories:

  <*PS_CFG_HOME*>\webserv\<*domain name*>\DES\DES0.stderr.log

  <*PS_CFG_HOME*>\webserv\<*domain name*>\DES\log\DES1_Debug.log

6. Verify that the DES is accessible from the PeopleSoft Pure Internet Architecture:
   a. Log on to PeopleSoft Pure Internet Architecture.
   b. Select Marketing, Dialog Monitoring, Control Center, Server Monitor.
   c. Click the Timer Status button.
   d. Confirm that the message Scheduler Timer is running.
7. Verify that the Integration Broker for PeopleSoft OLM is accessible:
   a. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
   b. Search for and open the PSFT_OLM node.
   c. Select the Connectors tab.
   d. Click the Ping Node button and verify that the ping was successful.

Task 3-12: Testing the Email Server

You must obtain and install one of the additional component email servers that Oracle recommends. Oracle does not provide this email server. After the email server installs, you must test to ensure that it is operational.

To verify that the email server is operational, perform the following tests:

1. If ping is enabled on your servers, ensure that the email server can send a ping notification *to* and receive a ping notification *from* the machine where the PeopleSoft OLM Mailcaster will be installed.
2. On the Mailcaster system, telnet to port 25 of the email server to test SMTP connectivity as follows:

```
telnet <emailserver> 25
HELO there
QUIT
```

3. Create a POP account on your email server.
4. On the Mailcaster system, telnet to port 110 to test POP account connectivity as follows:

```
telnet <emailserver> 110
HELO there
QUIT
```

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Task 3-13: Adding Standalone Dialog Servers (Optional)

This section discusses:

- Understanding Adding Standalone Dialog Servers
- Adding Standalone Dialog Servers
- Adding E-Mail Response Processor
- Adding Mail Service
- Adding Watch Dog
- Starting, Stopping, and Deleting Services

Understanding Adding Standalone Dialog Servers

If you run your batch servers on UNIX and want to run an Email Response Processor (ERP) application, you must copy the *ptib.jar* file from the DES installation to the *PS_HOME*/setup directory on the batch server.

Note. This task is not a requirement for Microsoft Windows and is only necessary if you plan to run ERP on the system.

To add standalone dialog servers (such as Mailcaster, ERP and Watchdog), you must make sure that the PeopleSoft Process Scheduler is started.

Note. All PeopleSoft OLM Standalone Dialog Server files will be installed to the ps_root/JavaApps directory. This directory must be writable and accessible by the PeopleSoft Process Scheduler. You must set the ps_root directory in the environment variable PS_VAL_HOME. If the environment variable PS_VAL_HOME cannot be found, the system will look for the environment variable PS_CFG_HOME. If both of these variables are not defined, the system will look for the directory in environment variable PS_HOME.

For the purpose of this task, PS_HOME is used.

Task 3-13-1: Adding Standalone Dialog Servers

To add standalone dialog servers:

1. Select Marketing, Dialog Monitoring, Control Center, Maintain Dialog Servers.

   The Maintain Dialog Servers page appears, as shown in the following example:

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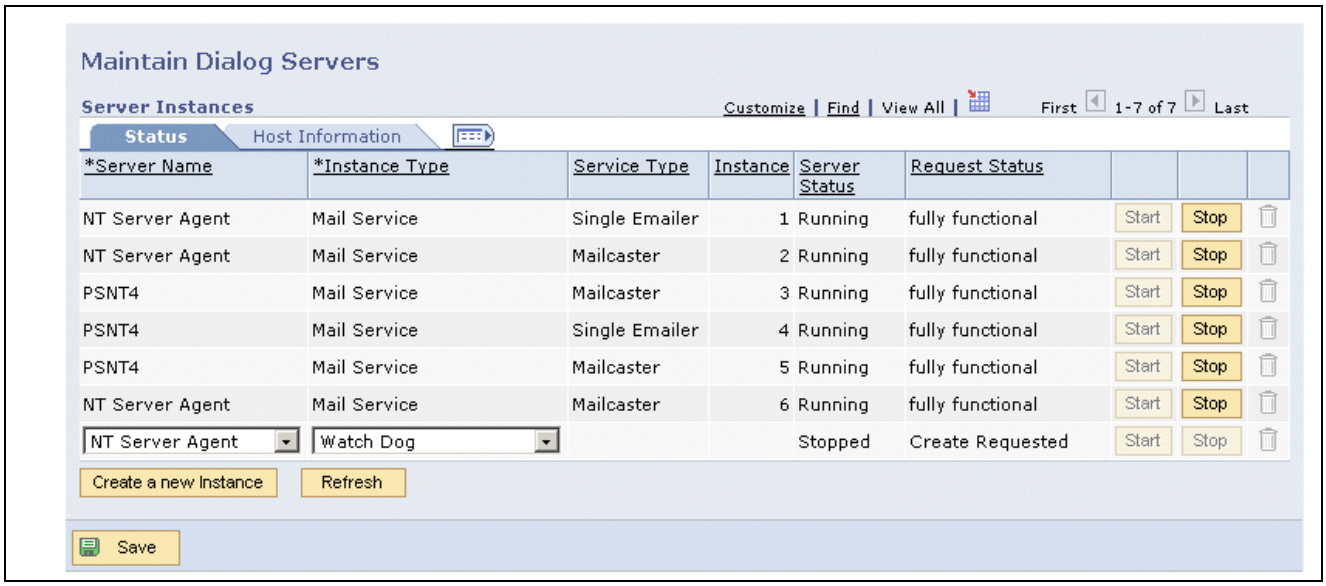

Maintain Dialog Servers page

2. Click the Create a New Instance button.
3. From the Server Name list, select one of your Process Scheduler servers.
4. Select the type of service that you want to add: *E-Mail Response Processor*, *Mail Service*, or *Watch Dog*.

Note. Adding services of each type increases the generated instance ID. The names of the directories that you create reflect this instance ID. For example, Mail Service with an instance ID of 3 creates an MCR3 directory.

---

5. To complete the addition of the service that you selected in the previous step, go to one of the following procedures, as applicable:
   - Adding E-Mail Response Processor
   - Adding Mail Service
   - Adding Watch Dog

Task 3-13-2: Adding E-Mail Response Processor

If your selection is *E-Mail Response Processor* (ERP) for the service type in step 4 of *Adding Standalone Dialog Servers*, you must complete the service installation by continuing with these steps.

To add the E-Mail Response Processor service:

1. Select one of the following service type options, and click Save:
   - *Bounce Process*—Select to manage mail bounces for cases in which the mail was sent to a nonexistent user.
   - *Reply Process*—Select to manage reply mails from existing users.
2. The request status is *Create Requested.*

   This status changes to *Create Successful* or *Create Failed* when the process completes.

   When successful, this step creates a *PS_CFG_HOME*/JavaApps/CRM/OMK/ERP3 directory under the Process Scheduler installation that you selected, as shown in the following example:

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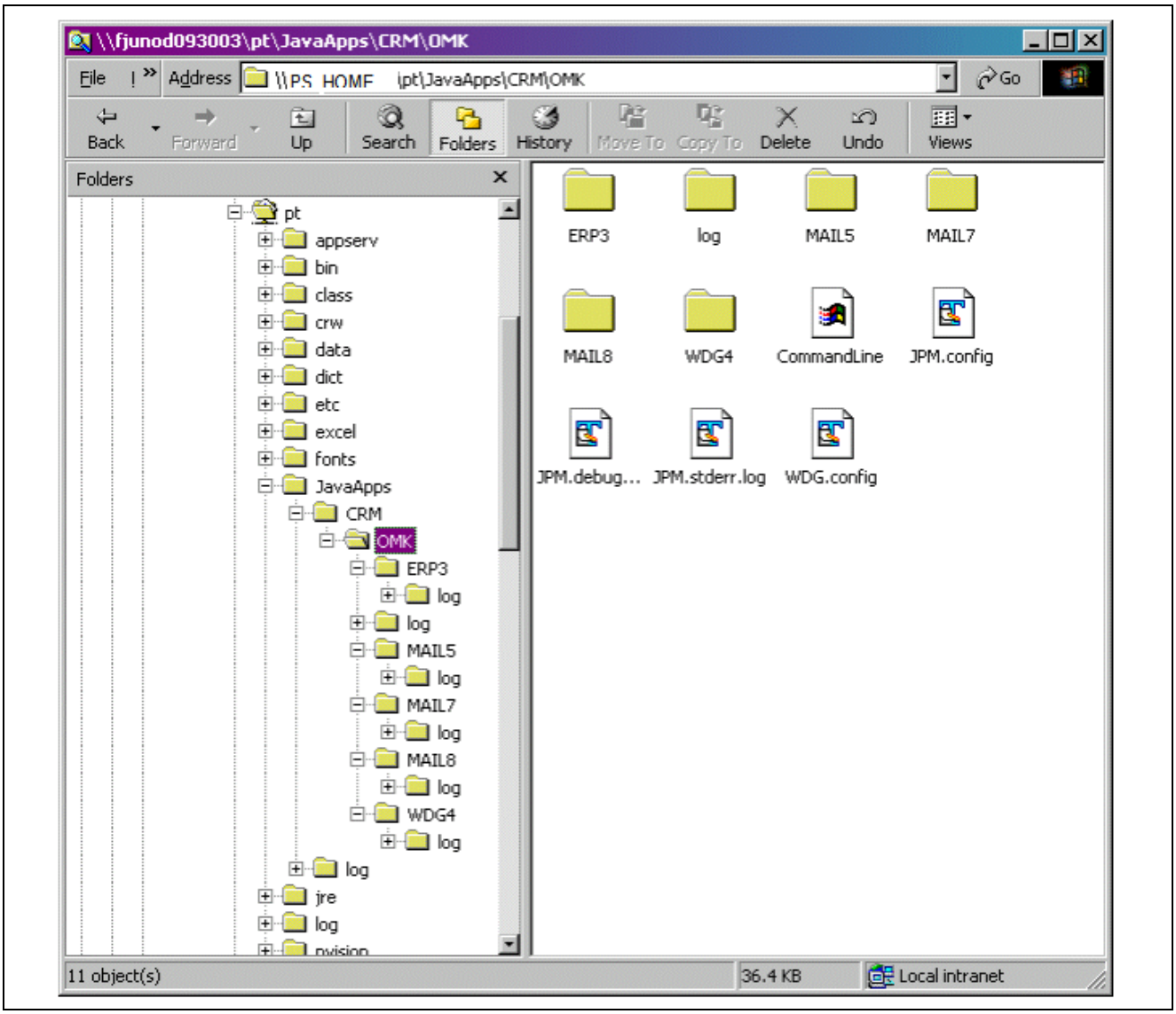

Example of OMK directory

3. Go to the installation directory and edit either bounce.script or reply.script, depending on which service option you installed.

   Both files are placed in this directory in case you want to change the behavior of this ERP. Many parameters must be modified because all of the necessary information is *not* available at installation. Some fields prepopulate with information that was available at the time of the installation. See the ERP documentation for more details about how to configure the ERP.

   The *commandLine* file in the same directory is the command that is run to start this ERP. If you want to modify the ERP server type (bounce, reply, or both), change the script that is included at the end of the command. If you include both, the ERP process does both. More information is available in the ERP documentation.

   If you want *both* bounce and reply processing to occur, Oracle recommends that you set up *both* script files and change the *commandLine* file to include *both* script file names on the command line.

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Task 3-13-3: Adding Mail Service

If you select *Mail Service* for the service type in step 4 of *Adding Standalone Dialog Servers*, you must complete the service installation by completing these steps.

To add Mail Service:

1. Select one of the following service type options, and click Save:
   - *Mailcaster*—Select to send bulk mails.
   - *Single Mailer*—Select to send single mails.
   - *Frequency Mailer*—Select to queue the bulk mails and single mails according to the frequency policy.
2. The request status is *Create Requested.*

   This status changes to *Create Successful* or *Create Failed* when the process completes.

   This step creates a *PS_CFG_HOME*/JavaApps/CRM/OMK/MCR1 directory under the Process Scheduler installation that you selected.
3. Review the *MCR.config* file that is found in the created directory.

   It is not necessary to modify the *MCR.config* file, unless you want to make a specific change.
4. If you want to change the type of mail service (for example, from bulk to single), edit the *commandLine* file and change the *"-t"* parameter.

   Use `single` for single mailer, `bulk` for bulk mail, and `frequency` for frequency mail.
5. If you select *Mail Service*, you can use it to install another service type.

   Because you will need both a single mailer and a bulk mailer, and you may also need a frequency mailer, you can repeat the preceding mail service installation steps 1 through 4 by selecting a different service type option. This installs as MCR2 or CRM3.

Important! If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the Mailcaster RMI server object to listen on a specific port. Add the following configuration parameters to each MCR.config file: HAS_FIREWALL=true, and FIREWALL_PORT=*PORT#*, where *PORT#* is the number of the port that opens in the firewall.

The default RMI port 1099, or the port to be specified in the RMIPORT config parameter, must open in the firewall as well. That port is the one through which the DES connects to the RMI registry.

Task 3-13-4: Adding Watch Dog

If your selection is *Watch Dog* for the service type in step 4 of *Adding Standalone Dialog Servers*, you must complete the service installation by completing these steps.

To add the Watch Dog service:

1. If your selection is the Watch Dog service, just click Save.

   Watch Dog has no service type options.
2. The request status is *Create Requested.* This status changes to *Create Successful* or *Create Failed* when the process completes.

   This step creates a *PS_CFG_HOME*/JavaApps/CRM/OMK/WDG1 directory under the Process Scheduler installation that you selected.
3. Edit the WDG.config file.

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The Watch Dog configuration file is complicated; therefore, you should review the Watch Dog documentation before you attempt the configuration.

4. If you are installing more than one Watch Dog on the same machine, you must set *qkLookPort* differently in each of the configuration files.

   However, there should be no reason to run more than one Watch Dog on the same server.

Task 3-13-5: Starting, Stopping, and Deleting Services

To start one of the services, click the Start button, and then click Save. You must click Save to start the service.

Note. The Start button is not active until the services are at the *Create Successful* state.

The system sets the state to *Run Requested,* and that changes to *Fully Functional.* If the state becomes *Run Request Failed,* further diagnosis is necessary. Many log files in the *JavaApps* directory tree can help with this result.

To stop a service, click the Stop button, and then click Save. You must click Save to stop the service.

Note. The Stop button is not active unless a service is operational.

The state changes to *Stop Requested,* and that changes to *Shutdown Normally* or *Timed Out* or *killed by process monitor.* In these cases, the process stops. If the state changes to *Stop Request Failed,* further investigation is necessary.

To delete a service, wait until the process stops. When the trashcan button becomes active, click the trashcan button, and then click Save to delete the service.

Task 3-14: Installing Adobe Graphic Dialog Flow Designer

This section discusses:

- Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic
- Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere
- Installing Adobe Graphic Dialog Flow Designer on Microsoft Windows

Task 3-14-1: Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic

Graphic Dialog Flow Designer is an Adobe Flex application on the PeopleSoft Pure Internet Architecture server. This task details how to deploy the Adobe Graphic Dialog Flow Designer on Linux and UNIX for Oracle WebLogic.

1. Verify that files *DialogDesigner_wl.ZIP* for Oracle WebLogic exist and are in: <*PS_HOME*>/setup /PsMpPIAInstall/archives/
2. Run the PIA *install.sh* again at <*PS_HOME*>\setup\PsMpPIAInstall. You will see the following:

```
$ ./setup.sh
Executing setup.linux
```

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```
Preparing to install
Extracting the installation resources from the installer archive
Configuring the installer for this system's environment
Launching installer
Preparing CONSOLE Mode Installation.
```

3. You will see the following:

```
Welcome to the InstallShield Wizard for Peoplesoft Internet Architecture.
```

Note. If installing onto an Oracle WebLogic Server, make sure to shutdown any running web servers to avoid web server corruption.

---

4. Select *1* for Next.
5. Choose the directory where you installed PeopleSoft, commonly known as "PS_HOME"
6. Please specify a directory name or press Enter, for example, [/data1/home/adconfig/PT852]
7. Select *1* for Next.
8. Choose the installation type that best suits your needs from the following. To select an item enter its number, or *0* when the task is complete.
   - 1- Oracle WebLogic Server
   - 2- IBM WebSphere Server
9. After you select your web server, select *1* for Next
10. Select the web server root directory, for example, [/opt/bea]: /data1/home/adconfig/bea. A message similar to the following will appear:

```
Detected web server version : WebLogic 10.3.1
```

11. Press 1 for Next.
12. Enter the administrator login and password for your WebLogic domain.
13. Select *1* for Next
14. Select from the following, to select an item enter its number, or *0* when the task is complete.
    - 1- Create New WebLogic Domain
    - 2- Existing WebLogic Domain
15. Select application name from list. To select an item, enter it's number.
    - 1- Install additional PeopleSoft site.
    - 2- Redeploy PeopleSoft Internet Architecture.
    - 3- Re-create WebLogic domain and redeploy PeopleSoft Internet Architecture.
    - 4- Deploy additional PeopleSoft application extensions.
16. Enter *4* to deploy additional PeopleSoft application extensions and enter *0* when the task is complete.
17. Press *1* for Next.
18. Please specify a name for the PeopleSoft website.

    For example *ps*.
19. Enter the post number and summaries.

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For example,AppServer name: *ui_sun10*

20. Press *1* for Next.
21. Enter the Name of the Web Profile used to configure the webserver. The user ID and password will be used to retrieve the web profile from the database. (NOTE: Other available preset web profile names are TEST, PROD, and KIOSK.)
    a. Web Profile Name [DEV]:
    b. User ID [PTWEBSERVER]:
    c. Password [PTWEBSERVER]:
    d. Re-type Password [PTWEBSERVER]:
22. Select *1* for Next.
23. Select the Report Repository location. Specify the following directory name:

    ```
    [/data1/home/adconfig/Peoplesoft Internet Architecture/psreports]
    ```

24. Select *1* for Next to display a summary of your selections.

    The summary of your selections displays for your review and confirmation and will look similar to the following example.

```
Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] :


================================================================================


Setup Type : weblogic

Web server root directory : /ds1/home/upgtest2/WLS1031

Web server version : 10.3

Web server domain : peoplesoft

Internet Architecture app name : PORTAL

Integration Gateway app name : PSIGW

PeopleSoft Business Interlink app name : PSINTERLINKS

PeopleSoft Online Library Infrastructure : PSOL

Environment Management Hub : PSEMHUB

Hello Portlet app name : helloportletapp

Portlet Container app name : pspc

Testsuite app name : testsuite

Wsrptest app name : wsrptest

Site name : ps

Authentication Token Domain :

Application server name : ui-sun10

JSL port : 9000

Report repository directory : /ds1/home/upgtest2/PeopleSoft Internet
Architecture/psreports

PIA webserver directory : /data1/oradata/CR91T204/webserv

Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1] :
```

Oracle WebLogic Summary window

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25. Select *1* for Next.
26. You will receive the following message:

```
Installation Complete Congratulations!
Peoplesoft Internet Architecture has been successfully installed to:data1/home⇒
/adconfig/PT852/webserv
```

27. Press Done to quit the installer.
28. Press ENTER to exit the Installer.

Task 3-14-2: Installing Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere

Graphic Dialog Flow Designer is an Adobe Flex application on the PeopleSoft Pure Internet Architecture server. This task details how to deploy the Adobe Graphic Dialog Flow Designer on Linux and UNIX for IBM WebSphere.

1. Verify that files *DialogDesigner_ws.ZIP* for IBM WebSphere exist and are in: <*PS_HOME*>/setup /PsMpPIAInstall/archives/
2. Run the PIA *install.sh* again at <*PS_HOME*>\setup\PsMpPIAInstall. You will see the following:

```
$ ./setup.sh
Executing setup.linux
Preparing to install
Extracting the installation resources from the installer archive
Configuring the installer for this system’s environment
Launching installer
Preparing CONSOLE Mode Installation.
```

3. You will see the following:

```
Welcome to the InstallShield Wizard for Peoplesoft Internet Architecture.
```

4. Select 1 for Next.
5. Choose the directory where you installed PeopleSoft, commonly known as <*PS_HOME*>.
6. Specify a directory name, or press Enter. For example: [/data1/home/adconfig/PT852]
7. Select *1* for Next.
8. Choose the installation type that best suits your needs from the following. To select an item enter its number, or *0* when the task is complete.
   - 1- Oracle WebLogic Server
   - 2- IBM WebSphere Server
9. After you select your webserver, select *1* for Next.
10. Select the Websphere Application Server directory. For example:

```
[/opt/Websphere61/AppServer]: /data1/home/IBM/WebSphere/Appserver
```

11. Select *1* for Next.
12. Select from the following. To select an item, enter its number, or *0* when the task is complete.

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- 1- Create New WebSphere Application
- 2- Existing Websphere Application

13. Select *2* for Next.
14. Enter *0* when the task is complete.
15. Select the application name from the list. To select an item, enter it's number:
    - 1- Install an additional PeopleSoft site.
    - 2- Redeploy PeopleSoft Internet Architecture.
    - 3- Deploy additional PeopleSoft application extensions.
16. Enter *3* to Deploy additional PeopleSoft application extensions and enter *0* when the task is complete.
17. Press *1* for Next.
18. Please specify a name for the PeopleSoft website.

    For example: *ps*
19. Enter the post number and summaries.

    For example, AppServer name: *ui_sun10*
20. Press *1* for Next.
21. Enter the Name of the Web Profile that you used to configure the webserver.

    The user ID and password will be used to retrieve the web profile from the database.

    Note. Other available preset web profile names are: *TEST*, *PROD*, and KIOSK.

    ---

    a. Web Profile Name [DEV]:
    b. User ID [PTWEBSERVER]:
    c. Password [PTWEBSERVER]:
    d. Re-type Password [PTWEBSERVER]:
22. Select *1* for Next.
23. Select the Report Repository location. Specify the following directory name:

    ```
    [/data1/home/adconfig/Peoplesoft Internet Architecture/psreports]
    ```
24. Select *1* for Next and to display a summary of your selections.

    The summary of your selections displays for your review and confirmation and will look similar to the following example.

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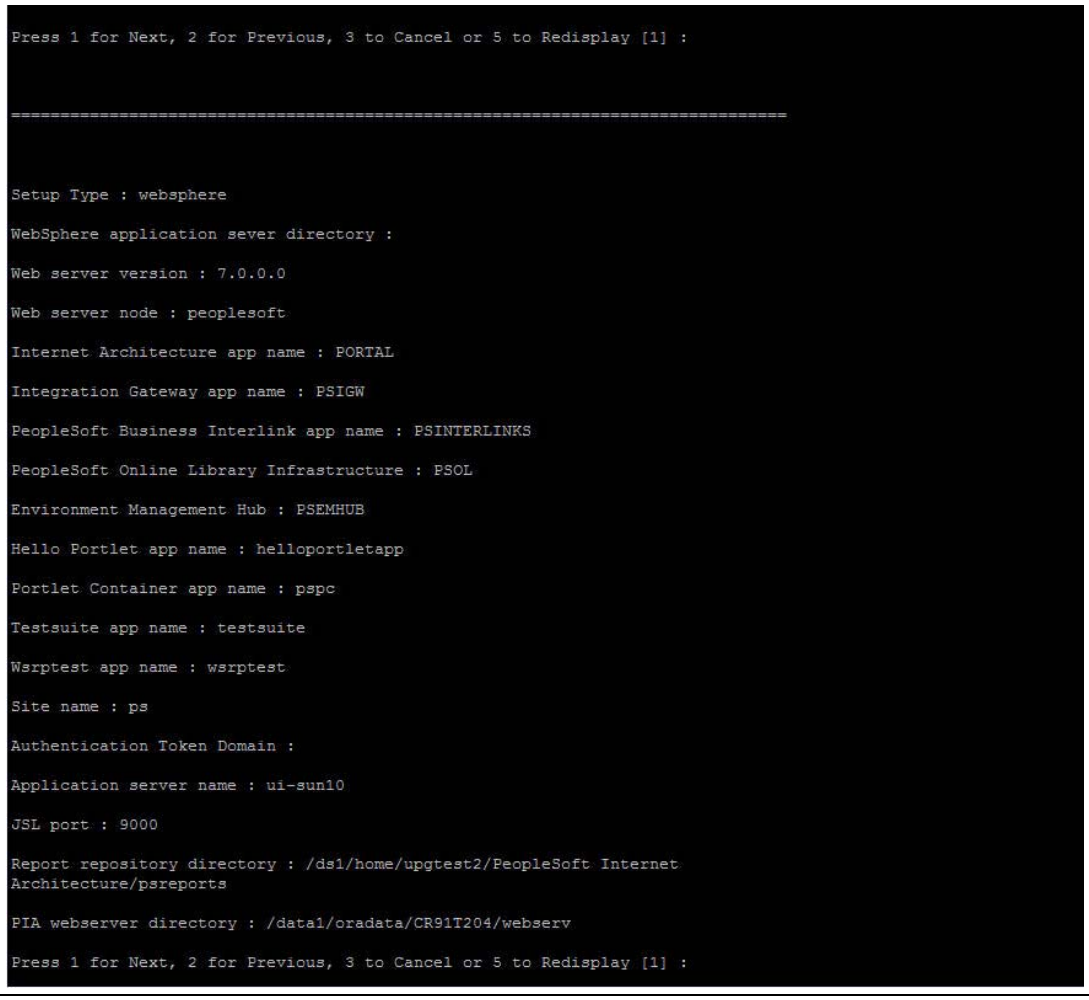

IBM WebSphere Summary window

25. Select *1* for Next.
26. You will receive the following message:

```
Installation Complete Congratulations!
Peoplesoft Internet Architecture has been successfully installed to:data1/home⇒
/adconfig/PT852/webserv
```

27. Press Done to quit the installer.
28. Press ENTER to exit the Installer.

Task 3-14-3: Installing Adobe Graphic Dialog Flow Designer on Microsoft Windows

Graphic Dialog Flow Designer is an Adobe Flex application on the PeopleSoft Pure Internet Architecture server. This task details how to deploy the Adobe Graphic Dialog Flow Designer on Microsoft Windows for both Oracle WebLogic and IBM WebSphere.

1. Verify that files *DialogDesigner_wl.ZIP* for Oracle WebLogic, and *DialogDesigner_ws.ZIP* for IBM WebSphere, are in: <*PS_HOME*>\setup\PsMpPIAInstall\archives\

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2. After you install the PeopleSoft Pure Internet Architecture server, run the *setup.bat* from <*PS_HOME*>\setup\ PsMpPIAInstall again to install the OLM extension.
3. Enter the same information that you used during the installation of the PeopleSoft Pure Internet Architecture server, with the exception of the next two steps (4 and 5).
4. Select Existing Weblogic/Websphere Domain and Deploy additional PeopleSoft extensions in the next step of the PeopleSoft Pure Internet Architecture Installation Wizard.
5. Check the Dialog Designer check box.
6. After installation completes, the flex application will be deployed as follows:
   - For Oracle WebLogic: <*PS_CFG_HOME*>\webserv\<*DOMAIN_NAME*>\applications\peoplesoft \PORTAL.war\crm
   - For IBM WebSphere: <*PS_CFG_HOME*>\webserv\<*DOMAIN_NAME*>\installedApps\<*DOMAIN_NAME*>NodeCell\<*DOMAIN_NAME*>.ear\PORTAL.war\crm
7. Restart the PeopleSoft Pure Internet Architecture server.

Task 3-15: Setting Up Profiles

This section discusses:

- Setting Up Automatic Numbering for Profiles
- Setting Non English Based Reserved Word

Task 3-15-1: Setting Up Automatic Numbering for Profiles

Define the automatic number initial value for profiles to ensure that Oracle can deliver system profiles in future releases.

To set up automatic numbering for profiles:

1. Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering.
2. Search for a row using these search parameters:

   SetID field set to *SHARE* and Number Type field set to *Profile.*
3. If no row matches, then click Add a New Value. If a row matches, open it.
4. Enter or verify the settings, as shown in the following example, and then click Save.

Note. If the existing value is greater than 20,000, retain the existing value without changes.

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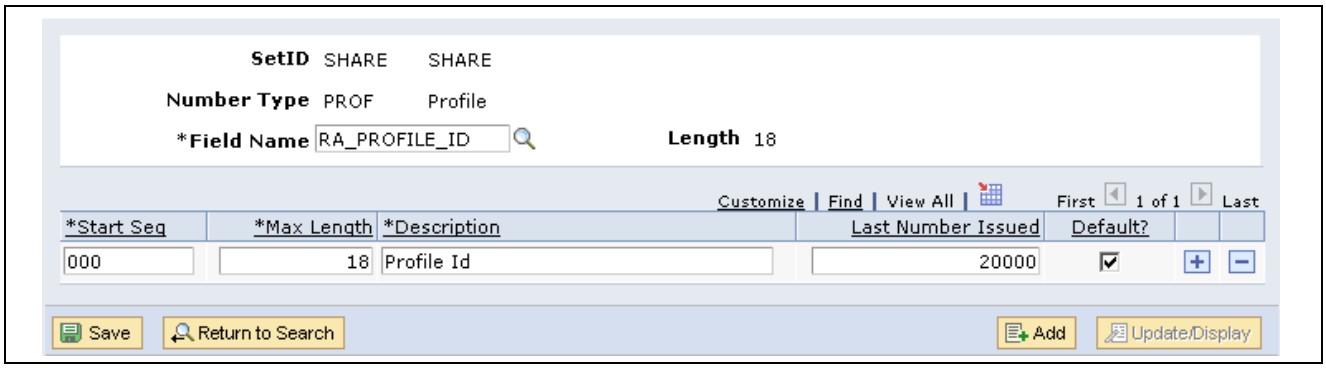

Profile Automatic Number page

Task 3-15-2: Setting Non English Based Reserved Word

If the base language for the PeopleSoft CRM database is a language other than English, do the following:

1. Run the PeopleSoft Data Mover Script *resetreservedwords.dms* in PeopleSoft Data Mover.
2. Run the Application Engine program RA_PROF_CACH from PeopleSoft Application Designer, to refresh the Application profile cache.
3. Sign in to PeopleSoft Pure Internet Architecture and manually open and then immediately save each document in the Demo database.

   Note. This step applies only to Demo databases.

4. Stop and restart the PeopleSoft Application Server and clear the server cache.
5. Stop and restart the DES.
6. If the name of any of the profile fields (*Individual.People.Role Type*, *Individual.People.Do Not Email*, and *Individual.People.Organization Role Type*) were modified and the profile reactivated, you must update the configuration parameters as follows:
   a. Select Set Up CRM, Product Related, Online Marketing, Setting.
   b. Change the value of the *doNotEMailProfileElementName* parameter to the value of the *Individual.People.Do Not Email* parameter.
   c. Change the value of the *roleTypeIdProfileElementName* parameter to the value of the *Individual.People.Role Type* parameter.
   d. Change the value of the *orgRoleTypeIdProfileElementName* parameter to the value of the *Individual.People.Organization Role Type* parameter.
   e. Click Save.

Task 3-16: Tuning the System (Optional)

This section discusses:

- Improving PeopleSoft OLM Transaction Performance
- Starting the Daily Survey Report Data Purge

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• Checking Heap Size for Java Virtual Machine on DES

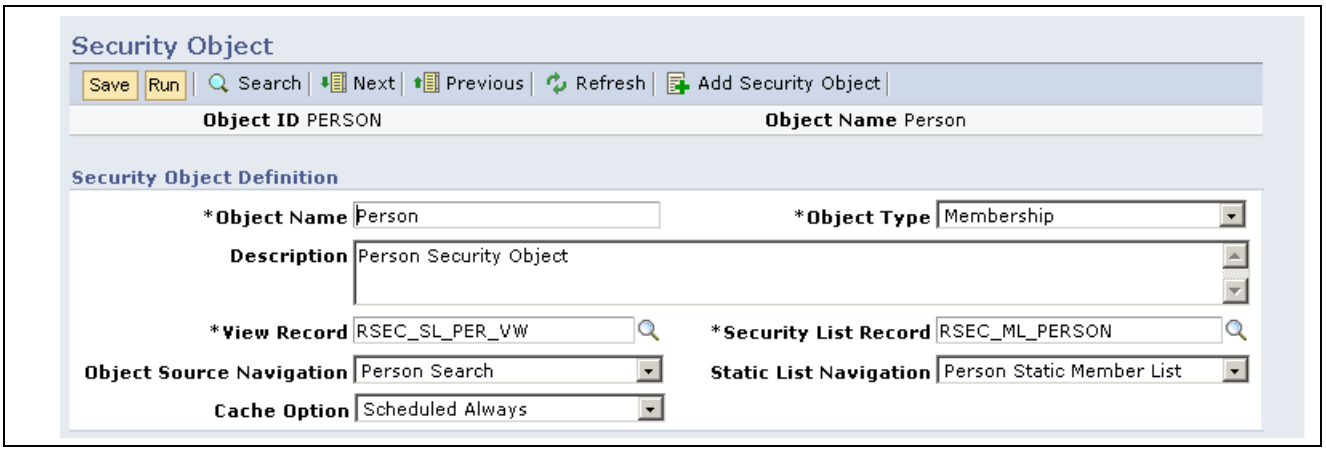
Task 3-16-1: Improving PeopleSoft OLM Transaction Performance

To allow the PeopleSoft OLM inserts to perform properly, you must set the security of the Person object to *Scheduled Always.*

Note. Complete this task if you plan to run the PeopleSoft Online Marketing (OLM) and Student Administration (SA) integration demo dialogs.

To set the security of the Person object:

1. Select Set Up CRM, Security, CRM Application Security, Security Object.
2. Search for the object ID *PERSON.*
3. In the Cache Option field, select *Scheduled Always,* as shown in the following example:



Security Object page

4. Click Save.

Task 3-16-2: Starting the Daily Survey Report Data Purge

Generating Survey ACE reports increases the data volume in the report table and can affect your system performance. Starting a daily report data purge process helps to maximize system performance for Survey ACE report generation.

To start the daily survey report data purge process:

1. Select PeopleTools, Process Scheduler, System Process Requests.
2. Create a new Run Control ID *OLM_ACE_REPORT_PURGE.*
3. Click Run.
4. Under Process Name, find *RY_RPT_SV_CP* and select the check box for that row, as shown in the following example:

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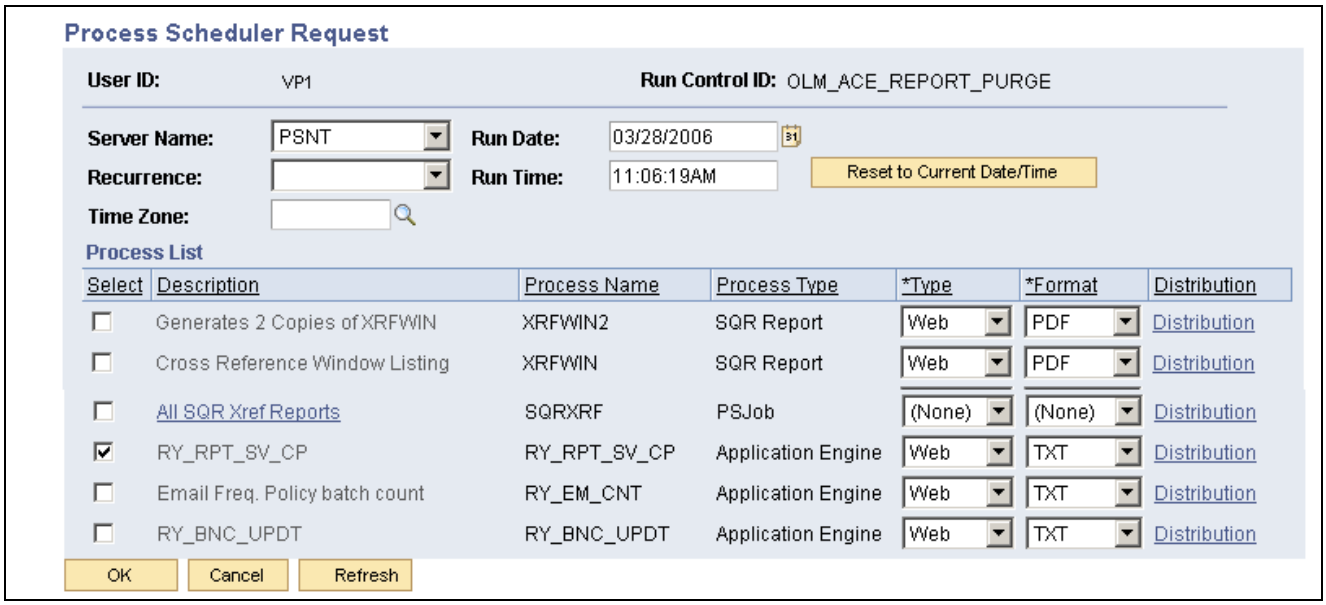

Process Scheduler Request page

5. Click OK.

Task 3-16-3: Checking Heap Size for Java Virtual Machine on DES

This section discusses:

- Understanding Memory Allocation for the DES
- Checking DES Java Options for DES on Oracle WebLogic
- Checking DES Java Options for DES on IBM WebSphere

Understanding Memory Allocation for the DES

You must allocate an appropriate amount of memory based on DES usage.

Verify that *-Xms32m -Xmx512m -XX:MaxPermSize=512m* is specified in the DES JAVA options.

Checking DES Java Options for DES on Oracle WebLogic

To check the DES Java options for DES on the Oracle WebLogic Server:

1. Open the DES *SetEnv* file and check the Java options.
2. Check the value of SET JAVA_OPTIONS_WIN32=.
3. If *-Xms32m -Xmx300m -XX:MaxPermSize=128m* does not appear, add it and save the file.

Checking DES Java Options for DES on IBM WebSphere

To check the DES Java options for DES on an IBM WebSphere Server:

1. If Heapdumps and JavaCore dumps are being generated in IBM WebSphere in the *WebSphereRoot*/AppServer directory, increasing the *maxHeapSize* to *512* megabytes may help.

   Increase the *maxHeapSize* as shown:

   ```
   <WebSphereRoot>\config\cells\<Nodename>\nodes\<Nodename>\servers\<omkserver>⇒
   \server.xml
   ```


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```
 has following...the maxHeapSize is in Megabytes
<jvmEntries XMI:id="JavaVirtualMachine_1"
 verboseModeClass="false"
verboseModeGarbageCollection="false"
verboseModeJNI="false"
initialHeapSize="0"
maximumHeapSize="256"
runHProf="false"
hprofArguments=""
debugMode="false"
debugArgs="-DJava.compiler=NONE -Xdebug -Xnoagent -Xrunjdwp:transport=dt_⇒
socket,server=y,suspend=n,address=7777"
genericJvmArguments="">
...
 </jvmEntries>
```

2. After you modify the Java options, restart the DES.

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CHAPTER 4

Installing PeopleSoft Order Capture Self-Service

This chapter discusses:

- Understanding PeopleSoft Order Capture SelfService
- Understanding the Guest User Role
- Understanding the Homepage URL
- Defining the Guest User
- Disabling the New Window URL

Understanding PeopleSoft Order Capture SelfService

This chapter provides instructions for the installation and setup of Oracle's PeopleSoft Order Capture Self-Service (OCSS) 9.1 with PeopleSoft Pure Internet Architecture. These instructions assume that you have already installed and configured a PeopleSoft CRM 9.1 database following the instructions that are provided earlier in this guide.

See "Installing PeopleSoft CRM 9.1 Applications."

Note. Oracle recommends that you consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

PeopleSoft OCSS is an externally facing application; therefore Oracle recommends that you implement PeopleSoft OCSS on separate web and application servers from your other internally facing PeopleSoft applications. This provides improved performance, increased security, and minimizes downtime for your website.

See Also

PeopleSoft PeopleTools 8.52 Installation (for your database platform) on My Oracle Support

PeopleSoft PeopleTools 8.52 PeopleBook: System and Server Administration on My Oracle Support

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Understanding the Guest User Role

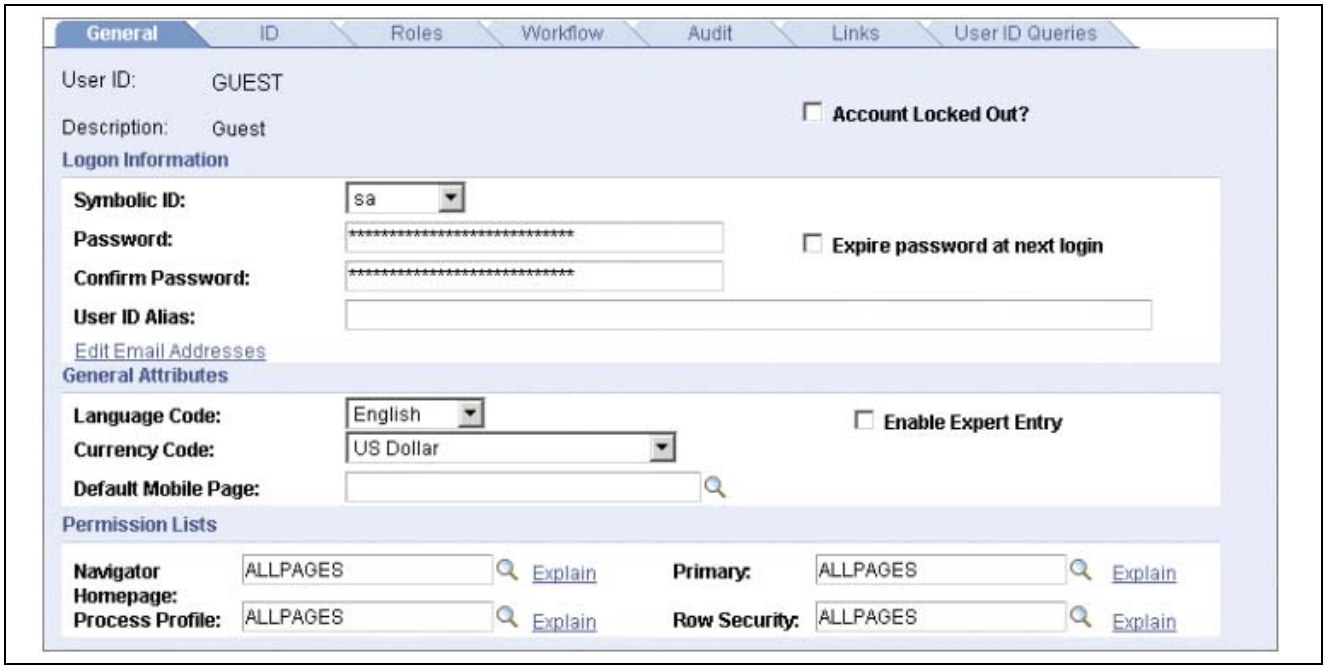
PeopleSoft OCSS does not use the standard PeopleSoft PeopleTools sign-on screen. Instead, all visitors to your site are automatically signed in with a default user ID of your choice (referred to as the *guest* user for the remainder of this chapter). The guest user ID determines the default language and business unit for your site. You must define and assign the following guest user roles:

- Guest
- PeopleSoft Guest

Oracle delivers a sample *GUEST* user profile as an example. You can use the example to understand how to set up a guest user correctly, and clone the profile as necessary. The guest user definition determines the default language and business unit in use on your site.

To view the sample guest user profile, select PeopleTools, Security, User Profiles.

The User Profile - General page appears, as shown in the following example:



User Profile page: General tab

To define the business unit, select Set Up CRM, Security, User Preferences.

The Overall Preferences page appears, as shown in the following example:

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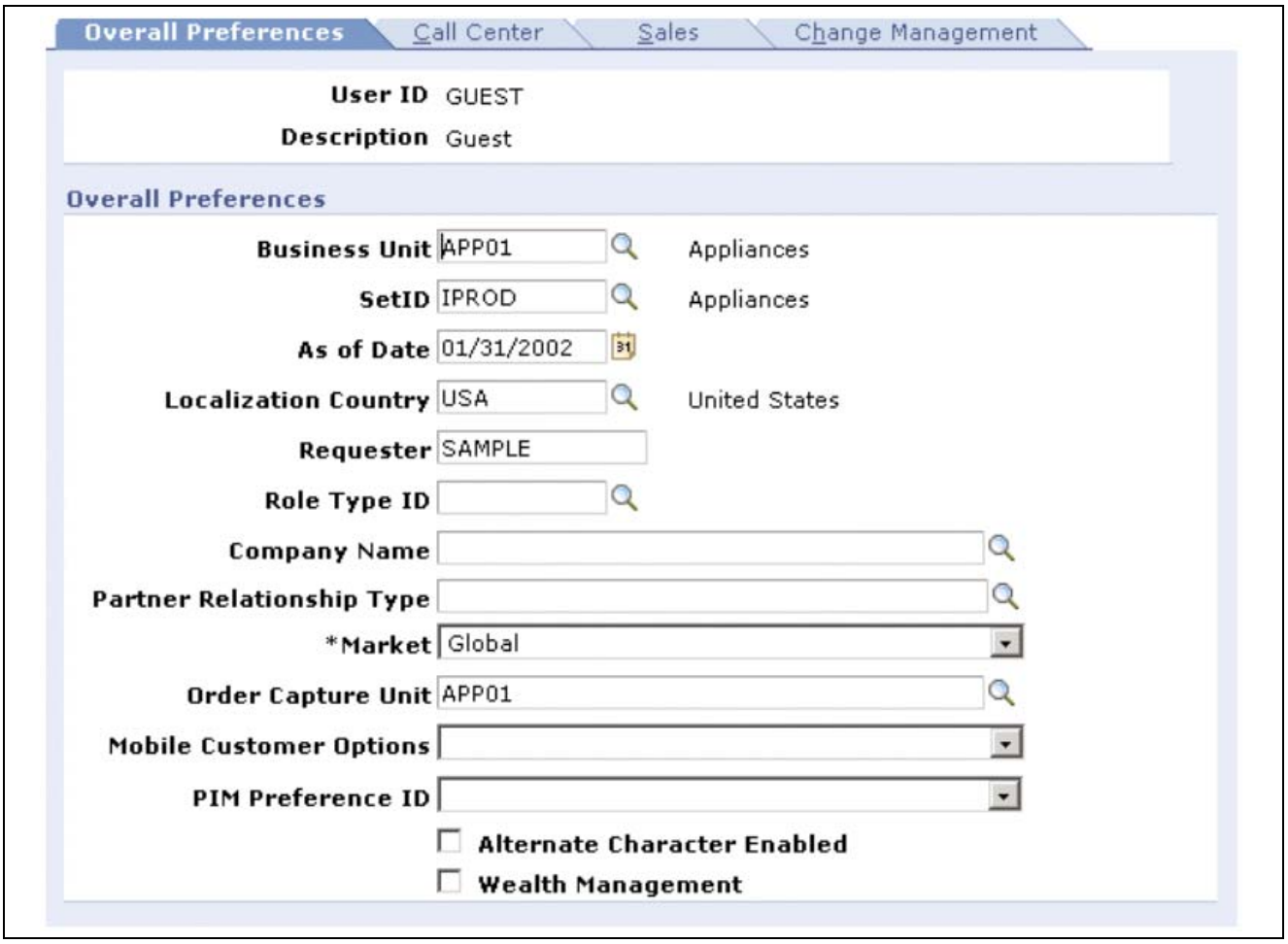

Overall Preferences page

This business unit must be a valid PeopleSoft Order Capture (OC) business unit.

If no business unit is defined on the Overall Preferences page, the default business unit is determined by using the Default Business Unit option set on the Order Capture Business Unit definition page.

To define or view PeopleSoft Order Capture business units:

1. Select Setup CRM, Business Unit Related, Order Capture Definition.
2. Verify that your guest user is set up to meet your business needs.

   The following example shows the Internal page displaying the default business unit:

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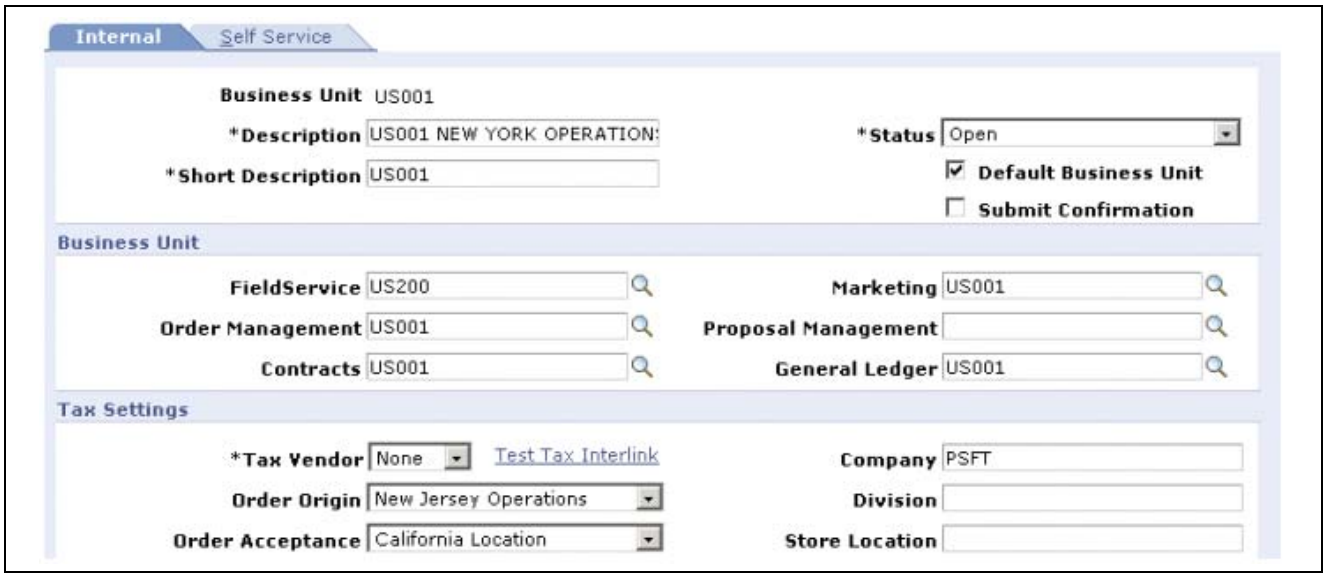

Internal business unit page

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences."

Understanding the Homepage URL

The URL of your PeopleSoft Order Capture Self-Service (OCSS) homepage depends on a number of factors. The following is a breakdown of the components of the URL:

```
http://<ServerName>/psp/<Site>/<portal>/<Node>/h/?tab=DEFAULT
```

- *Server Name*—This is your server name (for example, www.mycompany.com).
- *Site*—This is your server name (for example, www.mycompany.com).
- *Node*—This is the local portal node.

For example, if you accept all of the defaults when you are installing PeopleSoft OCSS, your URL would be:

```
http://www.servername.com/psp/ps/CUSTOMER/PSFT_CR/h/?tab=DEFAULT
```

Task 4-1: Defining the Guest User

You can define the guest user in the *configuration.properties* file:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Open the DEV profile definition.
3. Select the Security tab and locate the Public Users group box.
4. Select the Allow Public Access check box.
5. Enter *GUEST* in the User ID field and in the Password field, as shown in the following example:

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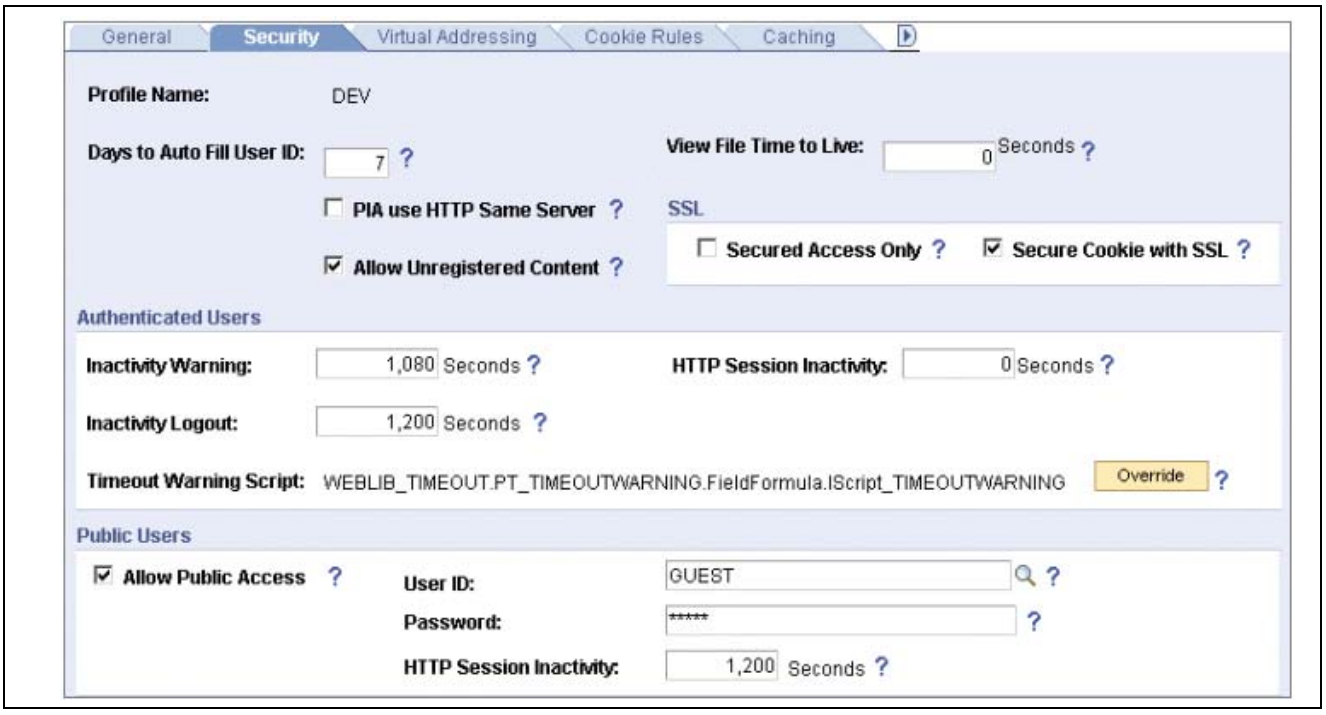

Web Profile Configuration: Security page

6. Click Save.

Task 4-2: Disabling the New Window URL

Disable the New Window link provided by default on every PeopleSoft Pure Internet Architecture page. If present, this link creates a potential security hole in your application.

To disable the New Window link and modify the web server *configuration.properties* file:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Open the DEV profile definition.
3. Clear the Enable New Window check box, as shown in the following example:

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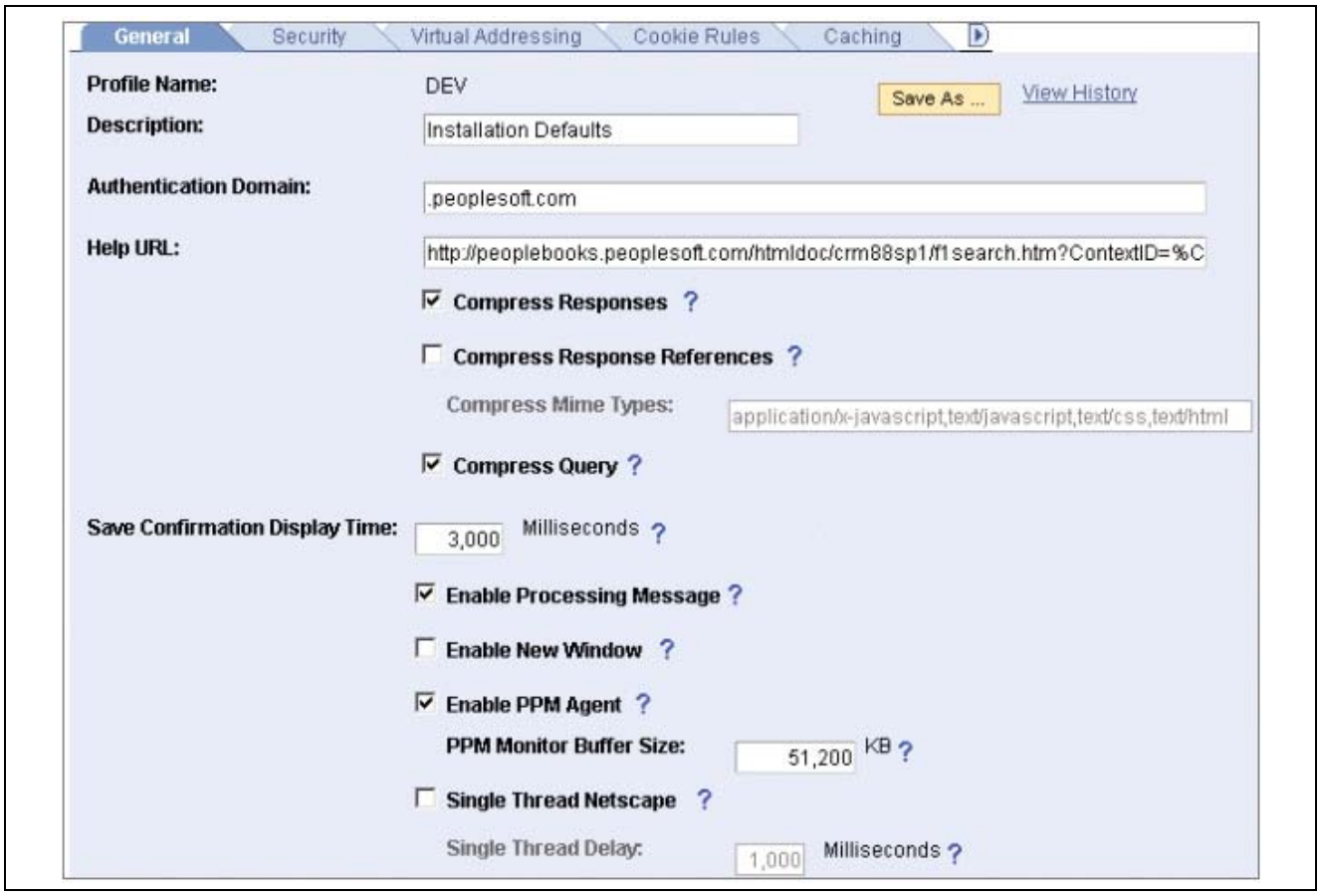

Web Profile Configuration: General page

4. Click Save.

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CHAPTER 5

Integrating PeopleSoft Order Capture Self-Service

This chapter discusses:

- Understanding Additional Component Integration
- Integrating the PeopleSoft Freight Calculation
- Setting Up Business Interlink Architecture for Tax
- Installing ADP Taxware and Vertex Databases
- Setting Up PeopleSoft OC with ADP Taxware WorldTax

Understanding Additional Component Integration

This chapter provides instructions for the integration and setup of additional component software with PeopleSoft Order Capture (OC) and Order Capture Self-Service (OCSS).

Note. Before proceeding with your installation consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft CRM 9.1 Installation Guide, PeopleSoft PeopleTools Installation guide for your database platform, and PeopleSoft PeopleTools 8.52 PeopleBooks.

Note. Additionally, consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

Task 5-1: Integrating the PeopleSoft Freight Calculation

This section discusses:

- Understanding PeopleSoft Freight Calculation
- Setting Up PeopleSoft Freight Calculation
- Testing the PeopleSoft Freight Calculation

Understanding PeopleSoft Freight Calculation

PeopleSoft products integrate with the Progistics ConnectShip application for freight calculation. Application messaging is used to communicate to the Progistics freight server. This task discusses how to set up the freight calculation integration.

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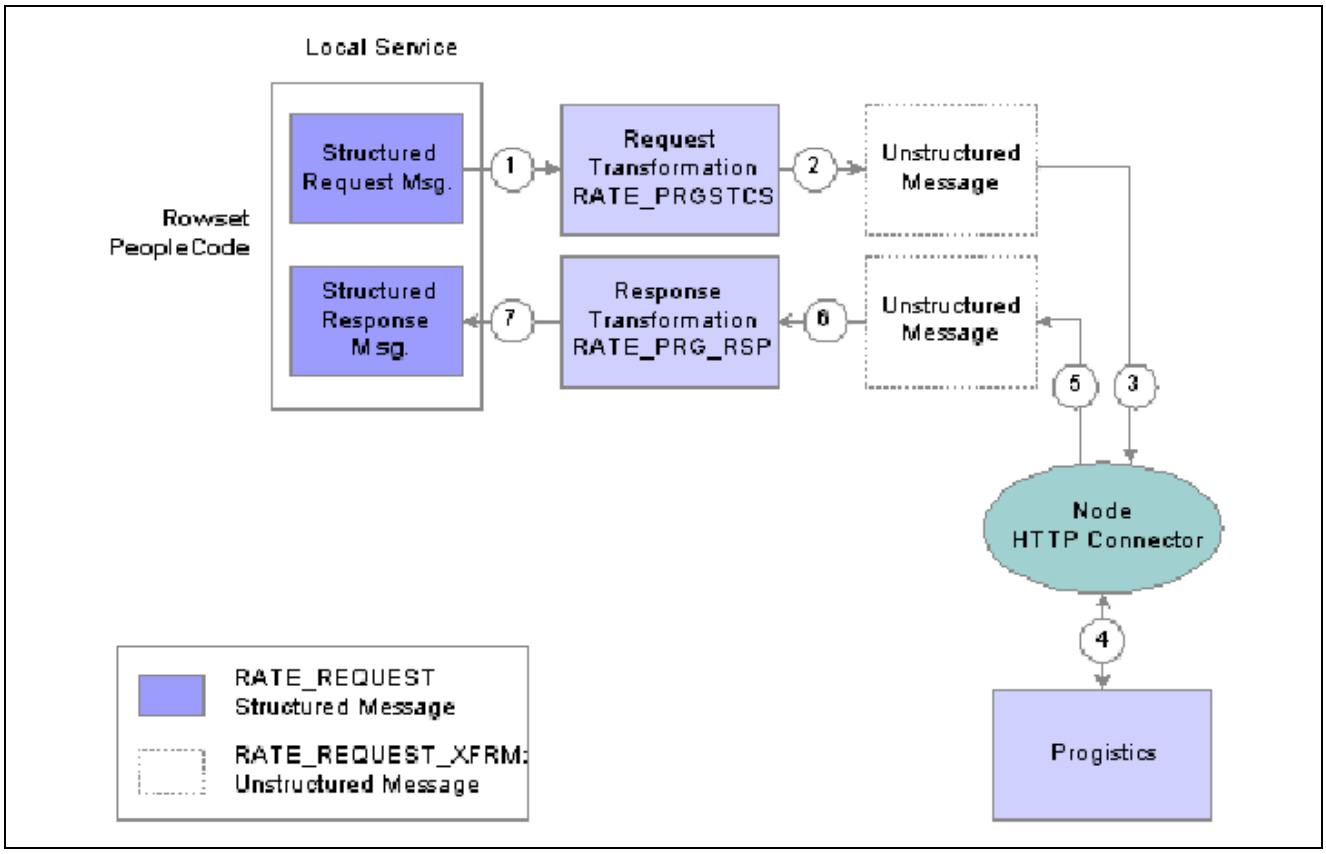
The following diagram represents the message flow between PeopleSoft applications and the Progistics ConnectShip application:



Message flow between PeopleSoft applications and the Progistics ConnectShip application

Task 5-1-1: Setting Up PeopleSoft Freight Calculation

To set up PeopleSoft freight calculation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Search for the RATE_REQUEST service operation.
3. On the Service Operation - General page, select the Active check box, as shown in the following example:

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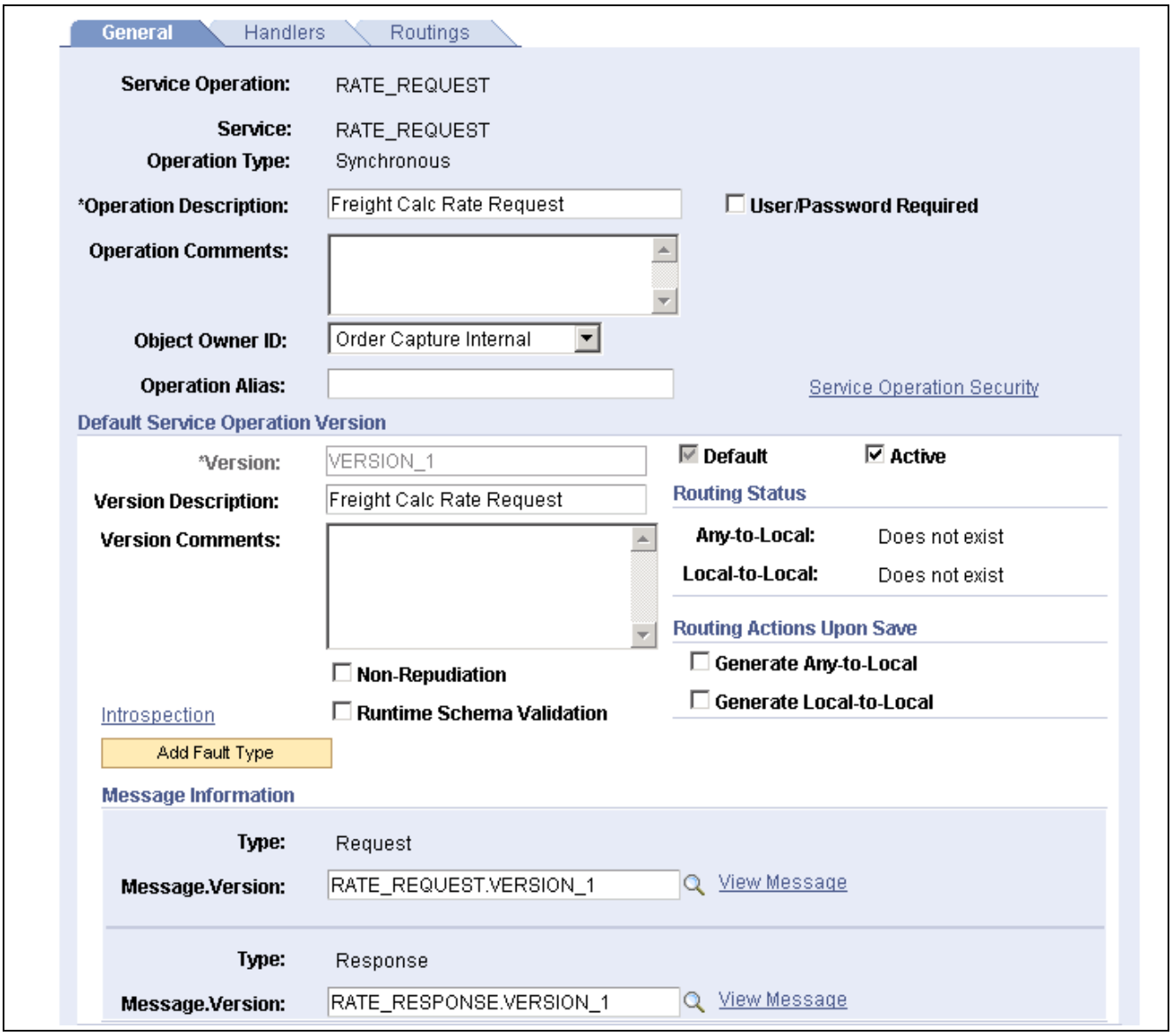

Service Operation: General page

4. Click Save.
5. Set the FREIGHT queue to *Run.*

   Select PeopleTools, Integration Broker, Integration Setup, Queues and search for the queue name FREIGHT. On the Queue Definitions page, set Queue Status to *Run*, as shown in the following example:

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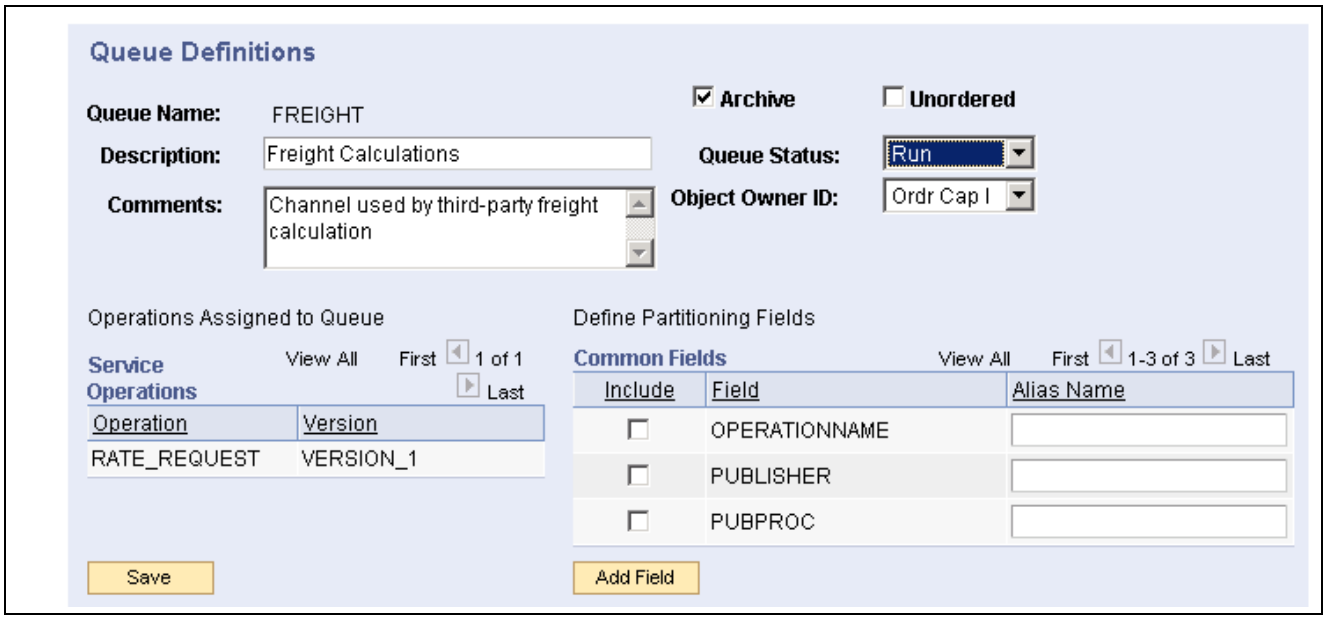
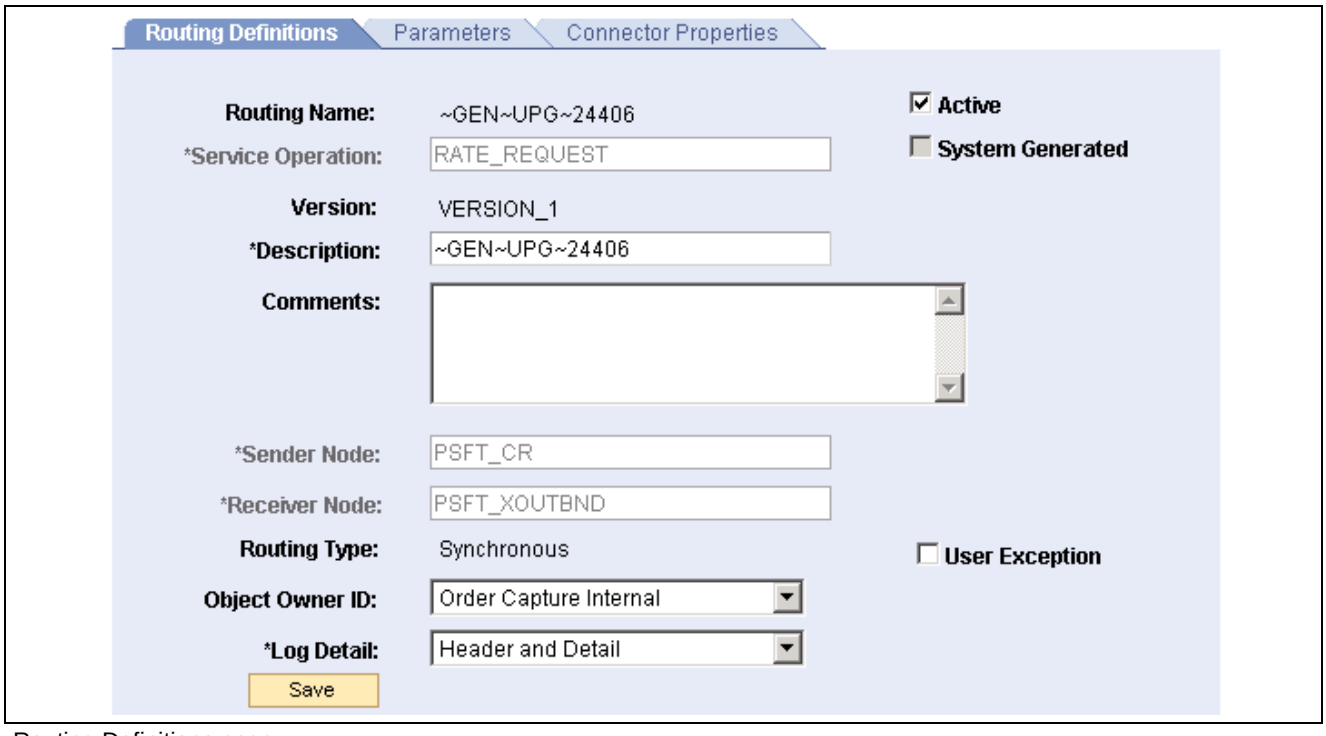


Queue Definitions page

6. Click Save.
7. Activate the RATE_REQUEST routing.

   Select PeopleTools, Integration Broker, Integration Setup, Routings and enter *RATE_REQUEST* in the Service Operation search field. On the Routing Definitions page, select the Active check box, as shown in the following example:



Routing Definitions page

Optionally, you can set the Log Detail field to *Header and Details* to facilitate troubleshooting of the freight calculation setup.

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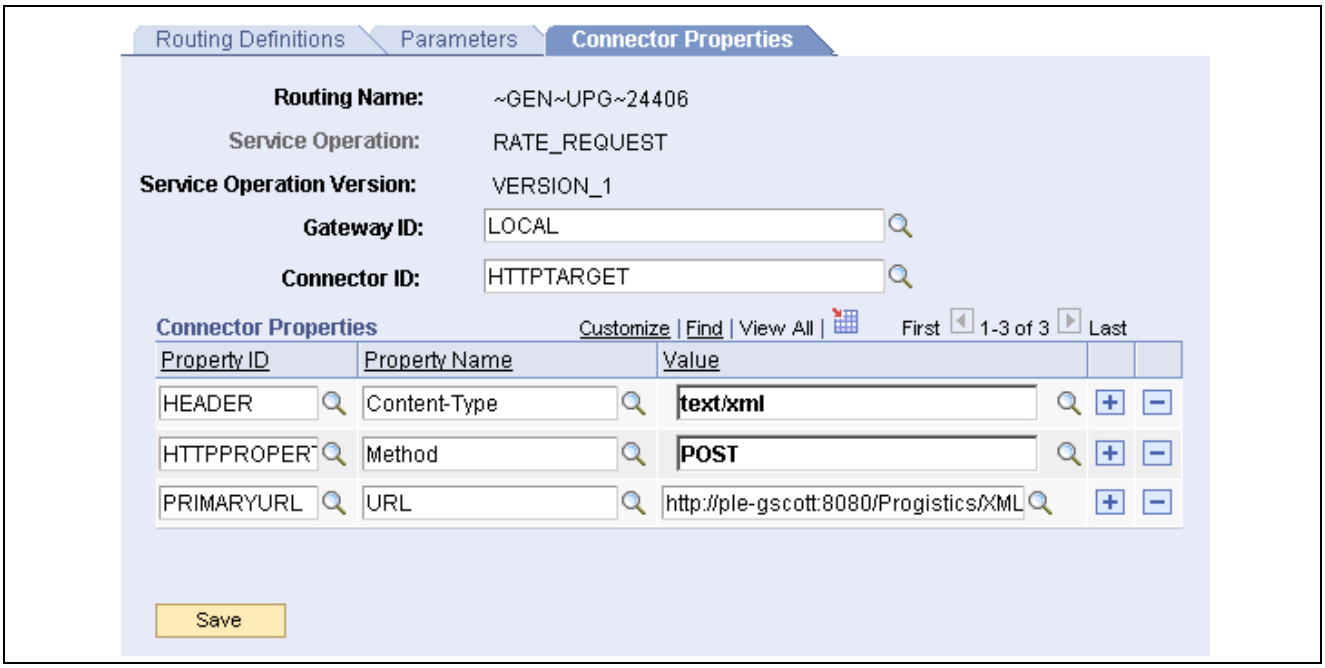
8. Set up the connector properties for the freight server. Click the Connector Properties tab to access the Connector Properties page.
9. On the Connector Properties page, enter rows with the field values, as listed in the following table:

Property ID	Property Name	Value
Header	Content-Type	text/xml
HTTPPROPERTY	Method	POST
PRIMARYURL	URL	ENTER the URL for the freight server. **Note.** The URL format will be similar to http://<machine> /Progistics/XML_Processor/Server /XMLProcDLL.asp. If you are not using port 80 on the progistics server, indicate the port in this the url, for example, <machine>:8080 .

The following shows an example of the Connector Properties page with the values entered from the table:



Connector Properties page

Task 5-1-2: Testing the PeopleSoft Freight Calculation

To test PeopleSoft Freight Calculations:

Note. This test uses UPS Ground as the carrier (TANDATA-UPS.UPS.GND). If you have not configured UPS Ground in Progistics for your business unit, the test can not calculate freight amounts.

---

1. Select Setup CRM, Business Unit Related, Order Capture Definition.

   This opens the Progistics Business Unit definition set up within PeopleSoft CRM, as shown in the following example:

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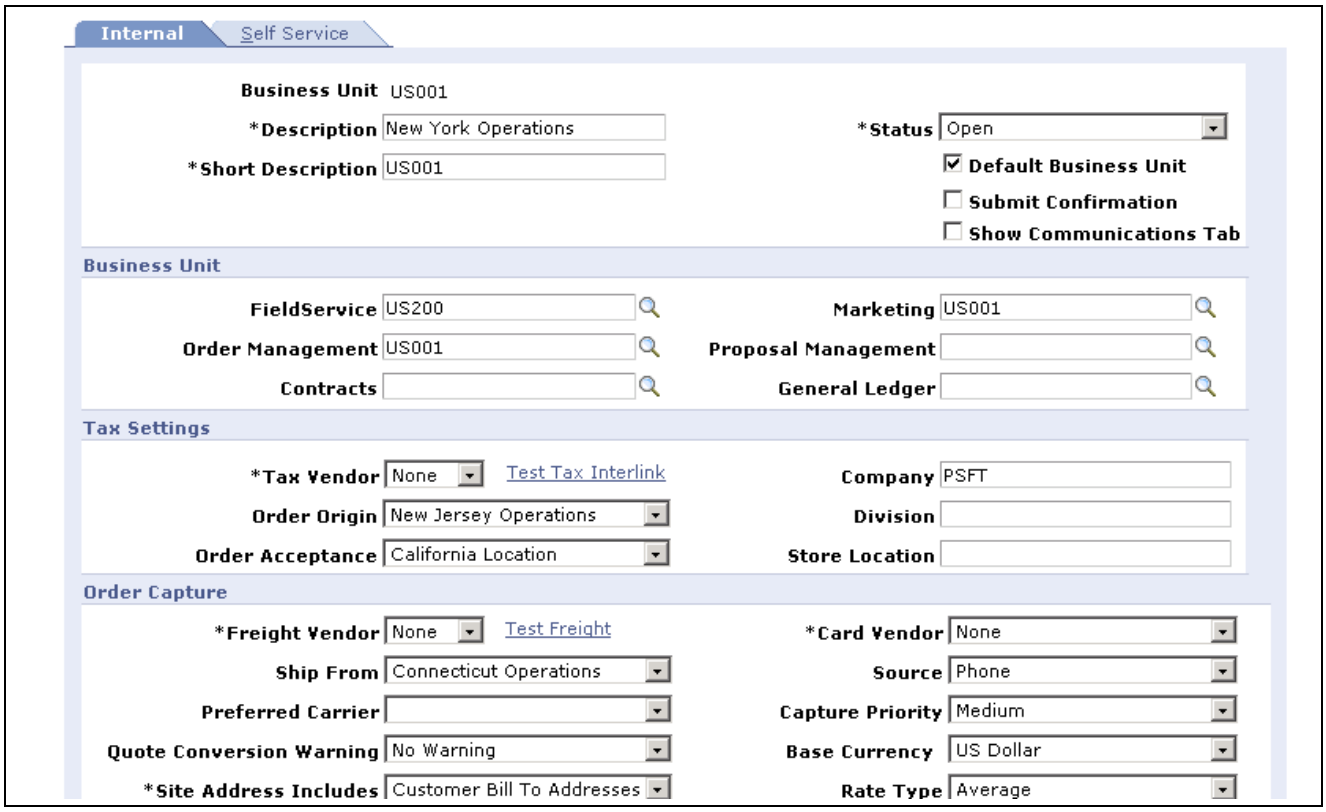

Order Capture Definition - Internal page (partial)

2. Click the Test Freight link.

   A message box displays with the results of your test, as shown in the following example:

Freight Amount Success Message

   If the Freight Amount returned is not zero, you are set up correctly.

3. Troubleshoot setup issues.

   If a zero freight amount is returned, check the Return Code and Return Message for assistance in determining what is not set up correctly. If you enabled Header and Details logging on the Routing Definitions page, you can also examine the synchronous message sent to Progistics during this test. To view the synchronous message details, select PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Synchronous Details.

Task 5-2: Setting Up Business Interlink Architecture for Tax

This section discusses:

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- Understanding the Business Interlink Setup
- Selecting Vendor Plug-in Locations
- Editing the Application Server Configuration File
- Selecting Vendor DLLs and Shared Library Locations

Understanding the Business Interlink Setup

PeopleSoft OC delivers two business interlink objects to interact with Vertex and ADP Taxware for both online and batch transactions: VERTEX_CALCTAX and TAXWARE_CALCTAX.

Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

All interlink objects must point to an interlink plug-in to function. As part of each interlink object setup, the parameter URL points to the interlink plug-in used to process transactions. For Vertex and ADP Taxware, this is set to point by default to the Microsoft Windows dynamic link library delivered to PeopleSoft CRM customers by each tax vendor as follows:

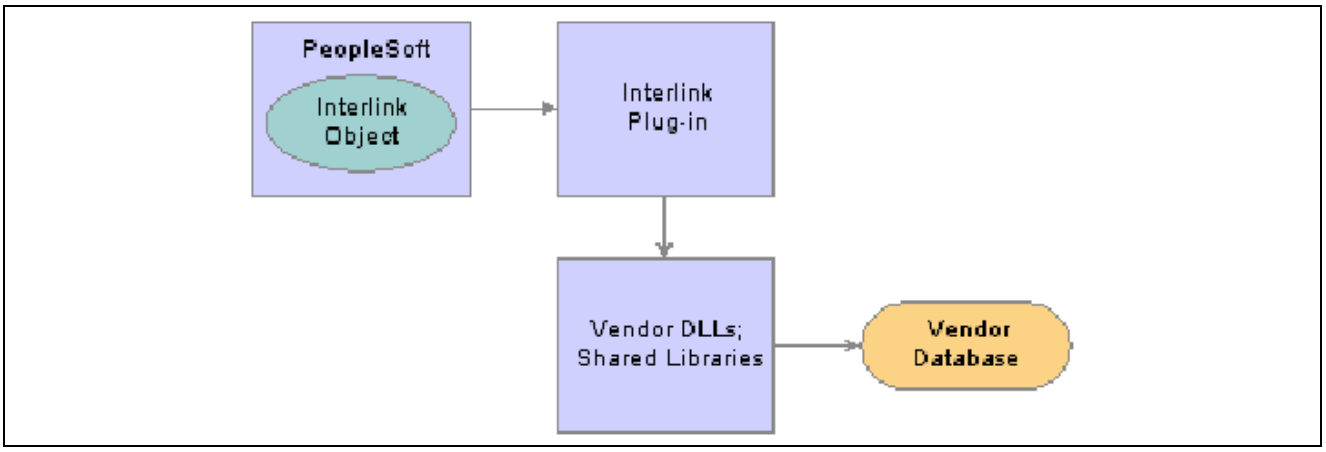
- For Vertex, this objects points to file://psbivrtx.dll.
- For ADP Taxware, the object points to file://pstxwint.dll.

Important! For UNIX, the 64 bit plug-ins are required. Contact Vertex or ADP Taxware directly to obtain the 64 bit plug-ins required for integration with PeopleSoft CRM and Order Capture.

When running in a UNIX environment, the interlink architecture converts the name from a DLL to a UNIX shared library/shared object. This is true even though the interlink object definition points to a Windows DLL. The interlink architecture adds the prefix "lib" to the name, and then adds the appropriate extension for each particular UNIX platform to replace the DLL extension.

For example, the interlink architecture changes the Windows DLL file, psbivrtx.dll, to libpsbivrtx.sl prior to each call to the interlink plug-in.

The following diagram illustrates the interlink architecture flow:



Interlink Architecture flow

In the Interlink Architecture Flow diagram, the PeopleSoft box can represent a 2-tier client (now only used to run the PeopleSoft Application Designer), the application server, or the Process Scheduler server.

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You can only perform 2-tier testing on a Microsoft Windows client running the PeopleSoft Application Designer. Use the Application Designer to open the interlink object definition and run the Interlink Tester.

Perform the setup instructions in the following tasks on each computer that you plan to use as an application server.

Selecting Vendor Plug-in Locations

By default, PeopleSoft CRM looks for the interlink plug in the directories listed in the following table:

Location	Mode
<*PS_APP_HOME*>\bin\client\winx86\InterfaceDrivers	For 2-tier testing
<*PS_APP_HOME*>\bin\server\<OS>\InterfaceDrivers where "OS" is your server's operating system	For the application server

These directories contain the XML script files that describe the interlink plug-in structure. The directories are also used to create the delivered interlink objects in PeopleSoft CRM. The XML script files have the same name as the windows DLL plug-in, except that the file extension "XML" is used instead of the "DLL" file extension.

When you purchase the Vertex software or the ADP Taxware software, each vendor provides the appropriate interlink plug-in that you must place in these directories. Although the copy under <*PS_APP_HOME*>\bin\client\winx86\InterfaceDrivers is not used in production, you can use this copy when testing initial connectivity in 2-tier mode by way of the interlink tester. The application server uses the plug-in copy in <*PS_APP_HOME*>\bin\server\<OS>\InterfaceDrivers.

For 2-tier testing, you can change the default interlink plug-in directory location in the Configuration Manager.

Editing the Application Server Configuration File

The application server configuration file has the following entry. Use this entry to change the plug-in default location:

```
[PSTOOLS]
;*****************************************************************
; General settings for PSTOOLS
;*****************************************************************
;Uncomment this to specify an alternate directory to search for Interface Drivers.
;Business Interlink Driver Directory=
```

Note. If you are using or plan to use the Bulk Order feature of PeopleSoft OC, your Process Scheduler calculates the taxes for child orders. You must perform the same plug-in configuration on your Process Scheduler as you do for the Application Server.

Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

Task 5-2-1: Selecting Vendor DLLs and Shared Library Locations

Vendor-supplied DLLs or shared libraries can be placed in the following locations for each respective operating system:

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- For Microsoft Windows:

  Typically, the vendor DLLs should be placed in the same directory as the PeopleSoft CRM main executable file, as listed in the following table:

Location	Mode
<*PS_HOME*>\bin\client\winx86	For 2-tier testing
<*PS_HOME*>\bin\server\winx86	For Application Server and Process Scheduler Server

  Vendor DLLs can also be placed in any directory that is in the PATH environment variable, which is accessible from the application server and the Process Scheduler server. This is also true when setting up a distributed interlink architecture.

- For UNIX:

  Typically, the vendor libraries should be placed in the same directory with the other PeopleSoft libraries. This directory is usually one of the directories pointed to by the LIBPATH environment variable that is set up in the psconfig.sh UNIX shell script: <*PS_HOME*>/bin.

Note. If the system cannot find the plug-in DLL and shared library or vendor supplied DLL and shared library, an error displays.

Task 5-3: Installing ADP Taxware and Vertex Databases

This section discusses:

- Understanding the ADP Taxware and Vertex Install
- Installing ADP Taxware
- Installing Vertex

Understanding the ADP Taxware and Vertex Install

Vertex Software and ADP Taxware provide installation instructions for their products for different operating systems and database formats. These can be as simple as creating ISAM files or as complex as creating and populating relational database tables. Check with your vendor contact for supported operating system platforms, database types and installation instructions.

Note. After you install the vendor software, test the software independent of the PeopleSoft CRM environment. Each tax vendor provides utilities for testing their software in this way. You must also provide a way for the vendor DLLs and shared libraries to find the location of the vendor database.

Task 5-3-1: Installing ADP Taxware

To install ADP Taxware on the following operating systems:

- For Microsoft Windows:

  ADP Taxware provides the following three INI files that you must set up to point to the location of the ADP Taxware database directories:

  - AVPTAX.INI
  - AVPSTEP.INI

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- AVPZIP.INI

  Place all three INI files into the WINNT directory. Each file contains a set of pointer variables that should point to the location where the ADP Taxware database files were placed during the installation of the ADP Taxware software.

- For UNIX:

  You must set up several environment variables in the psconfig.sh script of the PeopleSoft user who starts the application server and the Process Scheduler server. Define these variables and make them available to both the application server process and the Process Scheduler process. Directories should correspond to the location where you placed the ADP Taxware database files during the installation of the ADP Taxware software.

Task 5-3-2: Installing Vertex

To install Vertex on these operating systems, do the following:

- For Microsoft Windows:

  Vertex provides a registry file to populate entries in the Microsoft Windows registry.

- For UNIX:

  Vertex provides a configuration file called PSVTXCFG that contains similar entries to the files in an NT registry. This file must be accessible to the vendor supplied Shared libraries. Place this file in the same location as the shared libraries <*PS_HOME*>/lib. You can also place this file in any directory as long as an environment variable called PSVTXCFG is defined in psconfig.sh, and is set to point to the location of the configuration file. The psconfig.sh file must be for the PeopleSoft CRM user on the UNIX box that starts the application server and the Process Scheduler server. Define the variable for both the application server process and the Process Scheduler process so that the Vertex software can use it.

See *PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft Business Interlink,* "Business Interlinks for Application Developers."

Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

Task 5-4: Setting Up PeopleSoft OC with ADP Taxware WorldTax

This section discusses:

- Understanding ADP Taxware WorldTax Integration
- Integrating PeopleSoft OC with ADP Taxware
- Testing the Integration

Understanding ADP Taxware WorldTax Integration

PeopleSoft Order Capture (OC) integrates with ADP Taxware WorldTax to calculate value-added tax (VAT). This integration utilizes PeopleSoft Business Interlink technology.

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PeopleSoft OC makes a synchronous, XML-based call containing the order information (such as products, customers, pricing, and so on) to ADP Taxware WorldTax, which then calculates the appropriate VAT amount and returns it to PeopleSoft CRM. These VAT amounts are displayed on the order.

See *PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft Business Interlink,* "Business Interlinks for Application Developers."

Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

Task 5-4-1: Integrating PeopleSoft OC with ADP Taxware

To integrate PeopleSoft Order Capture (OC) with ADP Taxware WorldTax:

1. Verify that ADP Taxware WorldTax, System 2.5 is installed and operating correctly.

   For information, refer to the UTL2-1-2.pdf on the ADP Taxware WorldTax CD for installation instructions.

2. Verify that the Sun Java environment is installed and running on your application server.

   See *PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft Business Interlinks,* "Setting Up A Business Interlink Runtime Plug-In."

   See *PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft Business Interlinks,* " Setting up the Development Environment in Java."

3. Ensure psinterlinks.jar is referenced in the CLASSPATH.

   See *PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide,* " Setting Up A Business Interlink Runtime Plug-In."

   Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

   ---

4. Copy taxcommon.class from ADP Taxware WorldTax system that you installed in your environment to your <*PS_APP_HOME*>\class directory.

   For more information, refer to the UTL2-1-2.pdf on the WorldTax CD for installation instructions.

5. Extract crm_psoci_worldtax.class from the clear case of your installation and copy it to the <*PS_APP_HOME*>\class directory.

   This is the java class file developed by PeopleSoft to integrate with the ADP Taxware Worldtax system. Copy crm_psoci_worldtax.xml to the following two directories:

   - <*PS_APP_HOME*>\bin\client\winx86\interfacedrivers
   - <*PS_APP_HOME*>\bin\server\winx86\interfacedrivers

6. Configure the business interlink as a WebApp on IBM WebSphere.

   See *PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide,* "Configuring PSINTERLINKS as a WebApp on WebSphere."

   Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

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Task 5-4-2: Testing the Integration

After you integrate PeopleSoft OC with ADP Taxware, as instructed in the previous section, you can test the integration.

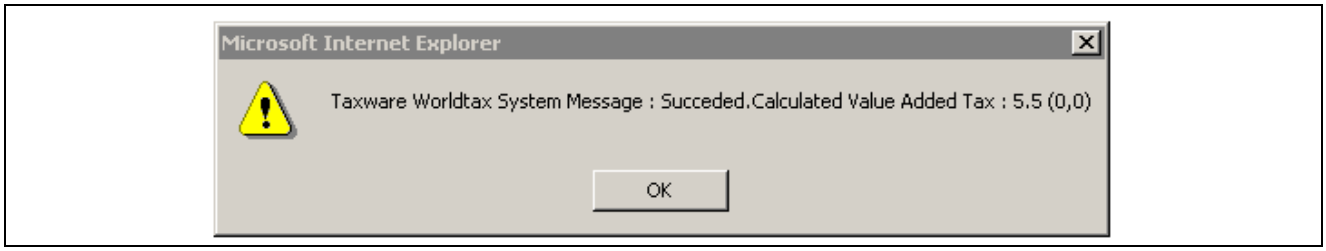
To test the business interlink:

Note. PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use PeopleSoft Integration Broker instead.

---

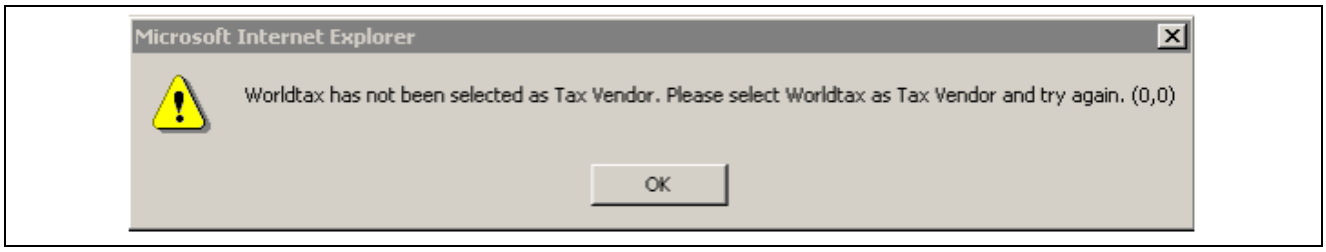
1. From the PeopleSoft CRM menu, select Set Up CRM, Business Unit Related, Order Capture Definition.
2. Select *WorldTax* from the Tax Vendor drop-down list box, and then click the Test WorldTax Interlink button.

   If the environment is set up correctly, the success message *Taxware Worldtax System Message: Succeded. Calculated Value Added Tax: 5.5* displays, as shown in the following example:



Taxware Worldtax success message

3. If you do not select *WorldTax* from the Tax Vendor drop-down list and click the Test Worldtax Interlink button, the error message *Worldtax has not been selected as Tax Vendor. Please select Worldtax as Tax Vendor and try again* displays, as shown in the following example:



Worldtax system error message

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CHAPTER 6

Integrating PeopleSoft Customer Relationship Management 9.1 with Oracle E-Business Suite

This chapter discusses:

- Understanding PeopleSoft CRM and Oracle EBS Integration
- Prerequisites
- Integrating PeopleSoft CRM for Oracle EBS using Fullsync
- Integrating PeopleSoft CRM for Oracle EBS using Incremental Sync
- Integrating PeopleSoft CRM for Oracle EBS using PeopleSoft 360-Degree
- Setting Up Action Links
- Setting Up Basic Business Events Subscriptions
- Creating New Business Events to Indicate Target URLs
- Setting the Encryption Key
- Applying Patches for Incremental Sync
- Publishing the PeopleSoft 360-Degree WSDLs
- Verifying Set Up Between PeopleSoft CRM and Oracle EBS

Understanding PeopleSoft CRM and Oracle EBS Integration

This chapter discusses the basic integration setup required in PeopleSoft Customer Relationship Management (CRM) for integration with Oracle E-Business Suite (EBS). This document does not contain details of the PeopleSoft integration framework. Tasks discussed in this document are based on the latest PeopleSoft PeopleTools release.

Three types of integration are involved when integrating PeopleSoft CRM and Oracle EBS:

- Data Synchronization to transfer relevant data from the Oracle EBS HR system to the PeopleSoft CRM system to create cases.

  This is performed in one of the following modes:

  - *Fullsync* mode: This mode copies the entire set of data from Oracle EBS.
  - *Incremental sync* mode: This mode only copies newly added or updated data.
- The PeopleSoft 360 Degree page.

  The PeopleSoft 360 Degree page retrieves data in *synchronous* mode.

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Prerequisites

For integration of PeopleSoft CRM and Oracle EBS, ensure that your system meets the following criteria:

1. You have installed and configured PeopleSoft PeopleTools 8.52 or higher.
2. You have installed and configured PeopleSoft Customer Relationship Management (CRM) 9.1 or higher.
3. Oracle E-Business Suite (EBS) Human Capital Management (HCM) - Build X1 or higher (the latest build available at the time of your install).
4. A dedicated Integration Broker.
5. All Service Operations and Messages set to Active.
6. WSDL must be published for all Services named (beginning with RC_EBS).
7. Oracle EBS_HR node configured to point to the Oracle EBS domain (the domain defined in the latest Oracle EBS HCM build).
8. You have access to the FTP location of the Oracle EBS Domain (where the files are created from the Full Sync process).
9. You have access to the Oracle EBS database (and you are able to use SQL Developer, SQLPlus, and so on).
10. Business Events discussion.
11. PeopleSoft 360-Degree Set Up.

Task 6-1: Integrating PeopleSoft CRM for Oracle EBS using Fullsync

This section discusses:

- Setting Up Service Operations for Fullsync
- Verifying Schemas for all Messages for Fullsync
- Configuring the Process Scheduler for Fullsync
- Locating the Fullsync Data File Folders
- Retrieving and Copying Fullsync Oracle EBS Data Files to the Process Scheduler

Task 6-1-1: Setting Up Service Operations for Fullsync

The fullsync process does not use integration set up. Instead, Fullsync mode uses Service Operations and Messages for coding efficiency.

To verify that all service operations are active:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Verify that the following Service Operations are available and set to *Active* in the PeopleSoft CRM system:
   - RC_EBS_DEPARTMENT_INC_SO
   - RC_EBS_JOBCODE_INC_SO

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- RC_EBS_LOCATION_INC_SO
- RC_EBS_PERSON_INC_SO
- RC_EBS_WORKFORCE_INC_SO
- JOBCODE_FULLSYNC
- PERSON_BASIC_FULLSYNC

Task 6-1-2: Verifying Schemas for all Messages for Fullsync

To verify that all messages have schemas defined:

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

   Open the message and click the Schema tab to access the Schema page.

2. Verify that the following messages have schemas defined:
   - RC_EBS_DEPARTMENT_INC, version 1.
   - RC_EBS_JOBCODE_INC, version 1.
   - RC_EBS_LOCATION_INC, version 1.
   - PERSON_BASIC_SYNC, Version 3.
   - WORKFORCE_SYNC, version 2.
3. If no schemas exist, do the following:
   a. Handle the first three messages as bugs (RC_EBS_DEPARTMENT_INC, RC_EBS_JOBCODE_INC and RC_EBS_LOCATION_INC), following your organization's *bug* procedures. This may involve contacting Oracle Global Customer Support (GCS).

Important! Rowset based messages must have schemas defined and are delivered with schemas. If any schemas are missing, you must treat it like a bug and assume that something did not install or copy correctly, causing the schemas to be lost.

---

   b. For PERSON_BASIC_SYNC and WORKFORCE_SYNC, click the Build Schema button on the Schemas page.

      As in step 1, you can access the Schema page by selecting PeopleTools, Integration Broker, Integration Setup, Messages. Open the message and click the Schema tab to access the Schema page.

4. If the Build Schema button is not visible, check the Service Configuration component. Ensure that the Service System Status is set to *Development*.
5. On Message Definition main page, if your new build displays a PeopleSoft PeopleTools message indicating that there is some inconsistency between the WSDL publish status and the actual WSDLs, or if the entire page is in Read Only mode and you cannot build a schema, do the following to clear the WSDL publish status:
6. On Message Definition main page, if your new build displays a PeopleSoft PeopleTools message indicating that there is some inconsistency between the WSDL publish status and the actual WSDLs, or if the entire page is in Read Only mode and you cannot build a schema, do the following to clear the WSDL publish status:
   a. Select PeopleTools, Service Utilities, Service Administration.
   b. Click the Clear WSDL export status link.

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Task 6-1-3: Configuring the Process Scheduler for Fullsync

To configure your process scheduler for Fullsync:

1. Create your own process scheduler using psadmin.
2. Start the server once, to register it.
3. Shut down the server.

   Shutting down the server is not required but recommended. Server shut down ensures that the server definition changes will be applied when you restart the server.
4. Select PeopleTools, Process Scheduler, Servers.
5. Search for and open the server that you just created.
6. On Server Definition page, in the Server Load Balancing Option field, select *Do not use for Load Balancing* from the drop-down list box.
7. In the Redistribute Workload Option field, select *Do not redistribute* from the drop-down list box.
8. Click the Save button to save the server definition.
9. Restart the process scheduler from psadmin.

   From the database list, select the database of the process server that you just created to start the process server. Allow a few minutes for the startup process to complete.

Task 6-1-4: Locating the Fullsync Data File Folders

After you run the Fullsync process in Oracle EBS, the Fullsync Data files are copied under the ftp *<EBS Server Name>* and folder:

Generally, this folder can be found under *Documents and Settings\<Windows User>\ psft\pt\<Tools Release>\appserv\prcs\<DB Name>\files.*

See Retrieving and Copying Fullsync EBS Data Files to the Process Scheduler

If you cannot locate or access the file, contact the group within your organization that handles your environments (this may be your Environments Group, your Network Administrator, or another entity within your organization).

Task 6-1-5: Retrieving and Copying Fullsync Oracle EBS Data Files to the Process Scheduler

Before you can copy the Fullsync data file to the process scheduler folder, you must retrieve that file from the Oracle EBS server.

Use the Microsoft Windows *ftp* command to copy the file to your local machine. The file can then be copied to the Process Scheduler Server folder.

1. To obtain the Request ID from the Oracle EBS server:
   a. Login to the Oracle EBS server using hcm/welcome.
   b. Select the responsibility Superuser HCM Manager, Vision Corporation.
   c. Select Processes and Reports, View Requests.
   d. Select All my requests, and if required change the number of days value, and then click the Find button.

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e. Write down the request ID.

2. Obtain the path and file name by running SQL in the SQL Developer and connecting to the Oracle EBS database.

   Select *outfile_name from fnd_concurrent_requests where request_id = <request id>*

3. Open the DOS command window and change the directory to the folder where you want the data file to be copied on your local machine.

   If you are using your c:\temp directory to copy files to your local machine, do the following:

   a. From your Start button, select Run.

   b. In the Run dialog box, enter *cmd*, and then press the Enter key on your keyboard.

   c. In the cmd.exe DOS prompt, enter *cd\temp*, and then press the Enter key on your keyboard.

4. Use the ftp command to connect to the Oracle EBS server. Retrieve the user ID and password to connect to the Oracle EBS domain using the FTP from your environments group. Your regular user ID that you use to login to your applications will not work.

Note. Oracle's Environments Group sets user IDs and passwords for FTP usage independently from any other user ID and password, due to security concerns and standards. The FTP user ID and password for access must be obtained from the group within your organization that sets and maintains the security settings. The following is an example session that shows the starting and executing of FTP on a Microsoft WindowsXP client:

   Usage: *ftp <EBS Server Name>*

5. Enter the user ID and password.

   Verify that you receive the message *Login Successful*, as shown in the following example:

Command Window

6. Use the get command to retrieve the file.

   You must use the same path and file name that you retrieved from the database in step 2, as shown in the following example:

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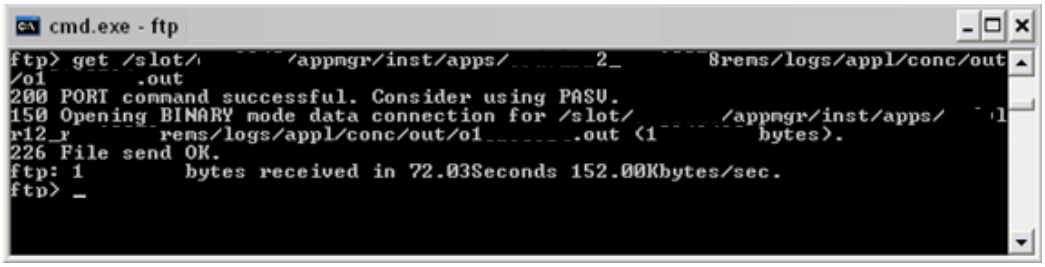

Command Window showing the get command to retrieve the file

Usage: *get <path>/filename*

7. If the file is transferred to your local workstation successfully, you will receive the message *OK*.
8. Copy this file to the Process Scheduler server as explained in the task *Configuring the Process Scheduler for Fullsync*.

   See "Configuring the Process Scheduler for Fullsync"

This concludes your integration set up in PeopleSoft CRM using Fullsync.

Task 6-2: Integrating PeopleSoft CRM for Oracle EBS using Incremental Sync

This section discusses:

- Setting Up the Local Gateway for Incremental Sync
- Verifying Schemas for all Messages for Incremental Sync
- Verifying Service Operations for Incremental Sync
- Verifying Handlers for Incremental Sync
- Verifying Routings for Incremental Sync
- Verifying Nodes for Incremental Sync
- Publishing WSDLs for Service Operations for Incremental Sync

Task 6-2-1: Setting Up the Local Gateway for Incremental Sync

Incremental Sync uses the PeopleSoft Integration Gateway to receive messages that are published by the Oracle EBS system.

Ensure that the Local Gateway is set up correctly:

1. Select PeopleTools, Integration Broker Configuration, Gateways.
2. Search for and open the local gateway to access the Gateways page.
3. On the Gateway Definition page, click the Ping Gateway button.
4. Verify that the status window indicates the Gateway is active.

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Task 6-2-2: Verifying Schemas for all Messages for Incremental Sync

To verify that all messages have schemas defined:

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

   Open the message and click the Schema tab to access the Schema page.

2. Verify that the following messages have schemas defined:
   - RC_EBS_DEPARTMENT_INC, version 1.
   - RC_EBS_JOBCODE_INC, version 1.
   - RC_EBS_LOCATION_INC, version 1.
   - PERSON_BASIC_SYNC, Version 3.
   - WORKFORCE_SYNC, version 2.
   - RC_EBS_PERSON_INC, version 1.
   - RC_EBS_WORKFORCE_INC, version 1.
3. If no schemas exist, do the following:
   a. Handle the first three messages as bugs (RC_EBS_DEPARTMENT_INC, RC_EBS_JOBCODE_INC and RC_EBS_LOCATION_INC), following your organization's *bug* procedures. This may involve contacting Oracle Global Customer Support (GCS).

   Important! Rowset based messages must have schemas defined and are delivered with schemas. If any schemas are missing, you must treat it like a bug and assume that something did not install or copy correctly, causing the schemas to be lost.

   ---

   b. For PERSON_BASIC_SYNC and WORKFORCE_SYNC, click the Build Schema button on the Schemas page.

      As in step 1, you can access the Schema page by selecting PeopleTools, Integration Broker, Integration Setup, Messages. Open the message and click the Schema tab to access the Schema page.
4. If the Build Schema button is not visible, check the Service Configuration component. Ensure that the Service System Status is set to *Development.*
5. On Message Definition main page, if your new build displays a PeopleSoft PeopleTools message indicating that there is some inconsistency between the WSDL publish status and the actual WSDLs, or if the entire page is in *Read Only* mode and you cannot build a schema, do the following to clear the WSDL publish status:
   a. Select PeopleTools, Integration Broker, Service Utilities, Service Administration.
   b. Click the Clear WSDL export status link to clear the WSDL publish status.

Task 6-2-3: Verifying Service Operations for Incremental Sync

To verify that the following service operations are active:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations to access the Service Operations pages.
2. On the General page, verify that the following Service Operations are available and set to *Active* in the PeopleSoft CRM system:

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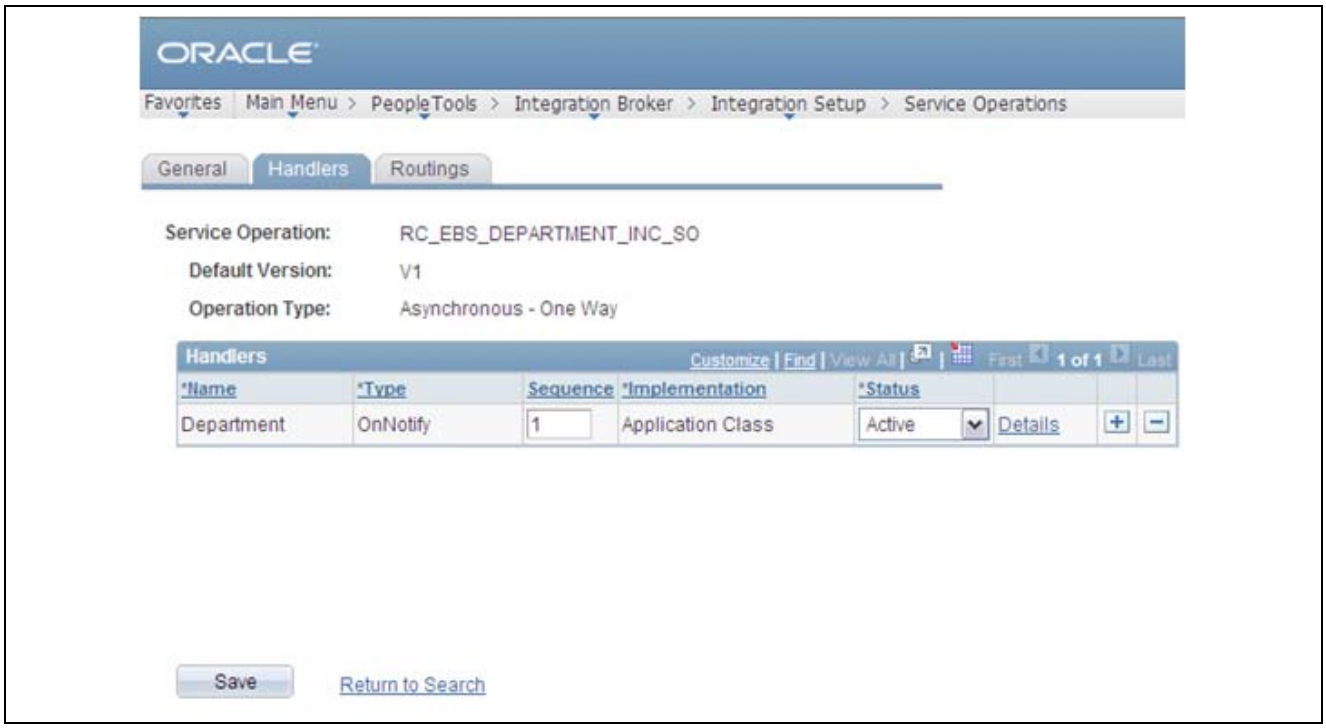
- RC_EBS_DEPARTMENT_INC_SO
- RC_EBS_JOBCODE_INC_SO
- RC_EBS_LOCATION_INC_SO
- RC_EBS_PERSON_INC_SO
- RC_EBS_WORKFORCE_INC_SO

Task 6-2-4: Verifying Handlers for Incremental Sync

To verify that handlers are defined:

1. Verify that each service operation in the previous task has a handler.
2. Click the Handlers tab to access the Handlers page and review each of the service operation definitions.

   A specified handler with a status of *Active* should be present, as shown in the following example:



Handlers tab

3. If no handler is specified, treat this issue as a bug and follow your organization's *bug* procedures. This may involve contacting Oracle Global Customer Support (GCS).

Important! Handlers *must* be defined and are delivered accordingly by Oracle. If any handlers are not defined, you must treat this issue like a bug and assume that something did not install or copy correctly, causing the handler definitions to be lost.

Task 6-2-5: Verifying Routings for Incremental Sync

Each of the service operations discussed in the previous task should contain at least one inbound routing.

Verify this by clicking the Routings tab to access the Routings page and review each of the service operation definitions.

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Task 6-2-6: Verifying Nodes for Incremental Sync

To verify that the EBS_HR node is set to active:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Node definitions page, verify that the Active Node check box is selected for the EBS_HR node.
3. Verify that the Default User ID field contains a valid default user ID.

   If the user ID is missing, contact your environments department. Your regular user ID and password that you use to access other applications will not work.

Note. Oracle's Environments Group sets user IDs and passwords for FTP usage independently from any other user ID and password, due to security concerns and standards. The FTP user ID and password for access must be obtained from the group within your organization that sets and maintains these security settings.

Task 6-2-7: Publishing WSDLs for Service Operations for Incremental Sync

Each time your database is refreshed (for example, when you receive a new build), Oracle recommends that you publish the WSDLs as follows:

1. Publish the WSDLs of the following Service Operations:
   - RC_EBS_DEPARTMENT_INC_SO
   - RC_EBS_JOBCODE_INC_SO
   - RC_EBS_LOCATION_INC_SO
   - RC_EBS_PERSON_INC_SO
   - RC_EBS_WORKFORCE_INC_SO

   To clear the WSDL publish status, if the WSDLs were already published in a prior build:
2. Select PeopleTools, Service Utilities, Service Administration.
3. On the WSDL page, click the Clear WSDL export status link.

   Proceed with these steps to publish the WSDs.
4. Select PeopleTools, Integration Broker, Web Services, Provide Web Service.

   The Provide Web Service Wizard - Select Services page appears (Wizard step 1).
5. On the Provide Web Service - Select Services page, enter *RC_EBS* in the Service Name field.
6. Click the Search link.

   Your search should pull up a list of five service operations on the Provide Web Service Wizard - Select Service Operations page (Wizard step 2).
7. Click the Select All link, and then click the Next button.

   The Select Service Operations page shows all of the service operations that you selected.
8. Click the Select All link again, and then click the Next button.

   The Provide Web Service Wizard - View WSDL page (Wizard step 3) showing all Services for whom WSDLs are generated.
9. Click the Next button.

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A confirmation page appears.

10. On the Provide Web Service Wizard - Specify Publishing Options page (Wizard step 4) confirmation page, click the Finish button.

    The Provide Web Service Wizard - Confirm Results page (Wizard final step showing the WSDL Generation Log and details) displays important WSDL details, as shown in the following example:

Provide Web Service Wizard - Confirm Results page is the Wizard's final step and shows the WSDL generation log and details

11. Copy the content into a buffer and paste into a text editor. You will need these URLs to set up Business Events in the Oracle EBS system.
12. Use each URL that ends in *wsdl* to configure the corresponding Business Events in the Oracle EBS system.

    Refer to the Oracle EBS setup document, available on My Oracle Support, for these instructions. You can paste these URLs into a separate document for later reference.

    See "EBS HCM Integration with PSFT CRM setup.doc"

This concludes your integration set up in PeopleSoft CRM using Incremental Sync.

Task 6-3: Integrating PeopleSoft CRM for Oracle EBS using PeopleSoft 360-Degree

This section discusses:

- Setting Up Messages for PeopleSoft 360-Degree
- Setting Up Nodes for PeopleSoft 360-Degree
- Verifying Service Operations for PeopleSoft 360-Degree
- Verifying Service Operation Handlers for PeopleSoft 360-Degree
- Verifying Service Operation Routings for PeopleSoft 360-Degree

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Task 6-3-1: Setting Up Messages for PeopleSoft 360-Degree

To set up messages for PeopleSoft 360-Degree:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Verify that the following messages are available:
   - EBS_360_REQUEST, version 1.
   - EBS_360_RESPONSE, version 1.
   - HD_360_RESPONSE_SYNC, version 2.
3. If schemas are missing for EBS_360_REQUEST and EBS_360_RESPONSE, treat this as a bug.
4. If a schema does not exist for HD_360_RESPONSE_SYNC, click the Build Schema button on the Schemas page of the message definition.

Task 6-3-2: Setting Up Nodes for PeopleSoft 360-Degree

Configuring the PSFT_CRM Node

The PeopleSoft 360-Degree page publishes messages to Oracle EBS in sync mode. Therefore, a URL to Oracle EBS Service WSDL is required. This is the opposite of Incremental Sync, where PeopleSoft CRM provides WSDL links to Oracle EBS.

To set up the nodes for PeopleSoft 360-Degree:

1. Publish the WSDL following the instructions from Oracle EBS Setup document that is available on My Oracle Support.

   See "EBS HCM Integration with PSFT CRM setup.doc"
2. Select PeopleTools, Integration Broker, Integration Setup, Nodes, to access and configure the Oracle EBS_HR node in the PeopleSoft CRM system.
3. Verify that the local node is PSFT_CR, as shown in the following example:

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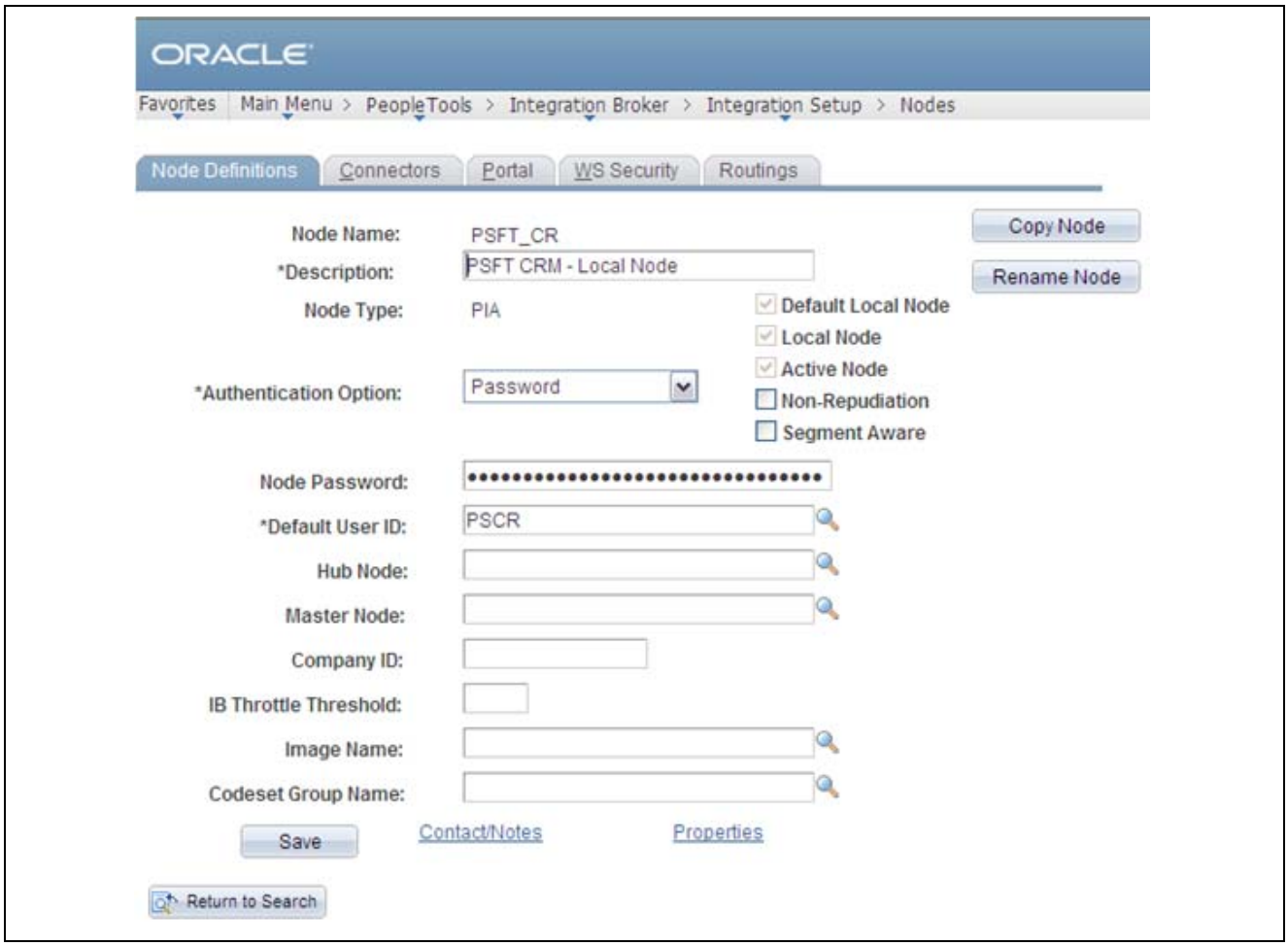

PSFT CRM - Local Node

Note. Because PeopleSoft PeopleTools Integration Broker uses the local node name to sign, for testing purposes PeopleSoft PeopleTools delivers a sample digital certificate for the PSFT_CR node. If a different node name is used, you must generate the keypair value in the *interop.jks*, and have it signed by the CA, or self-signed.

Configuring the EBS_HR Node

To configure the EBS_HR node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, to access and configure the Oracle EBS_HR node in the PeopleSoft CRM system.
2. Search for and open the EBS_HR node.

   The Node Definitions page appears.
3. Define the EBS_HR node definition parameters, as shown in the following example:

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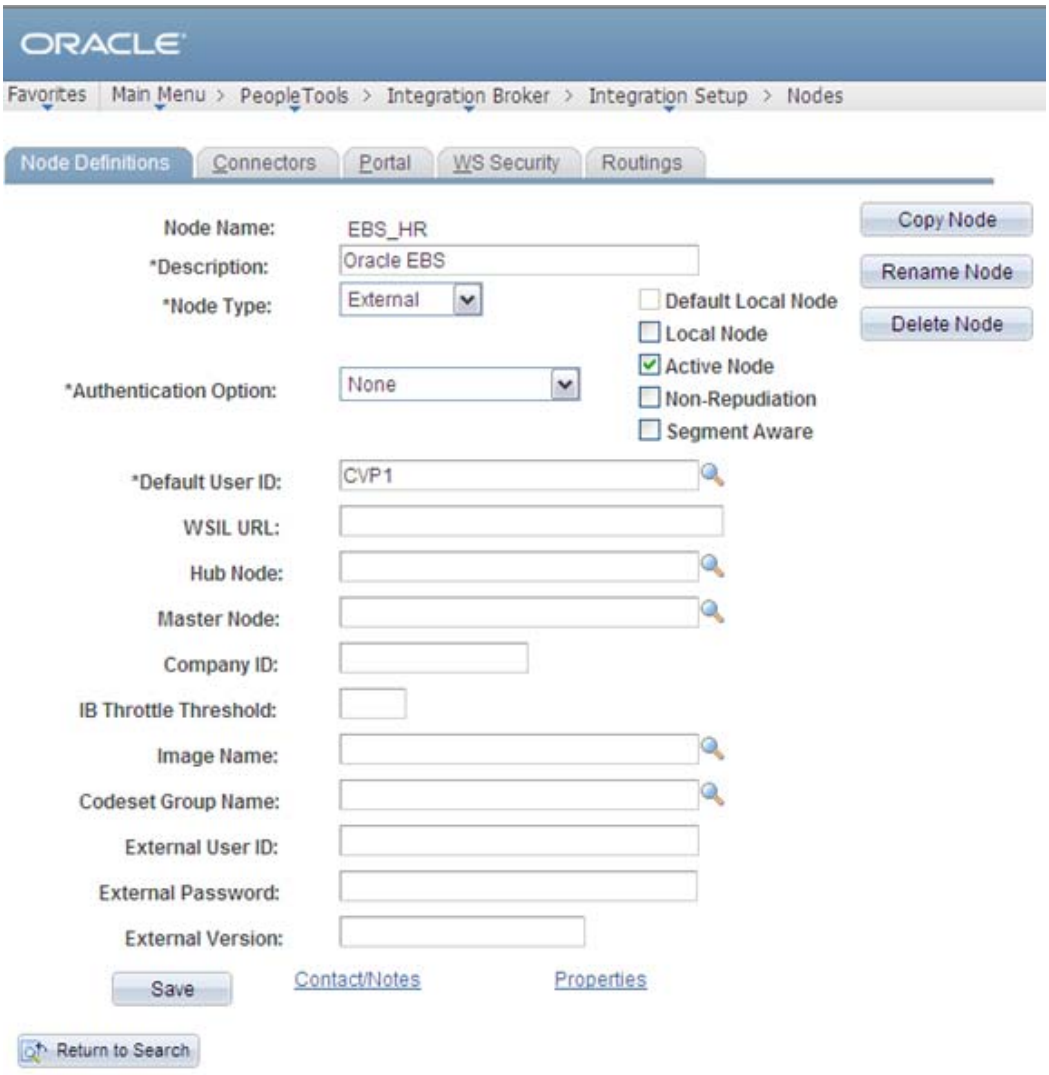

Node Definitions tab with EBS_HR node parameters

a. In the Node Type field, select *External* from the drop-down list.

b. In the Authentication Option field, select *None* from the drop-down list.

c. In the Default User ID field, enter *CVP1*.

d. Select the Active Node check box.

4. Click the Connectors tab to access the Connectors page for the EBS_HR node.

5. Define the EBS_HR node connector parameters, as shown in the following example:

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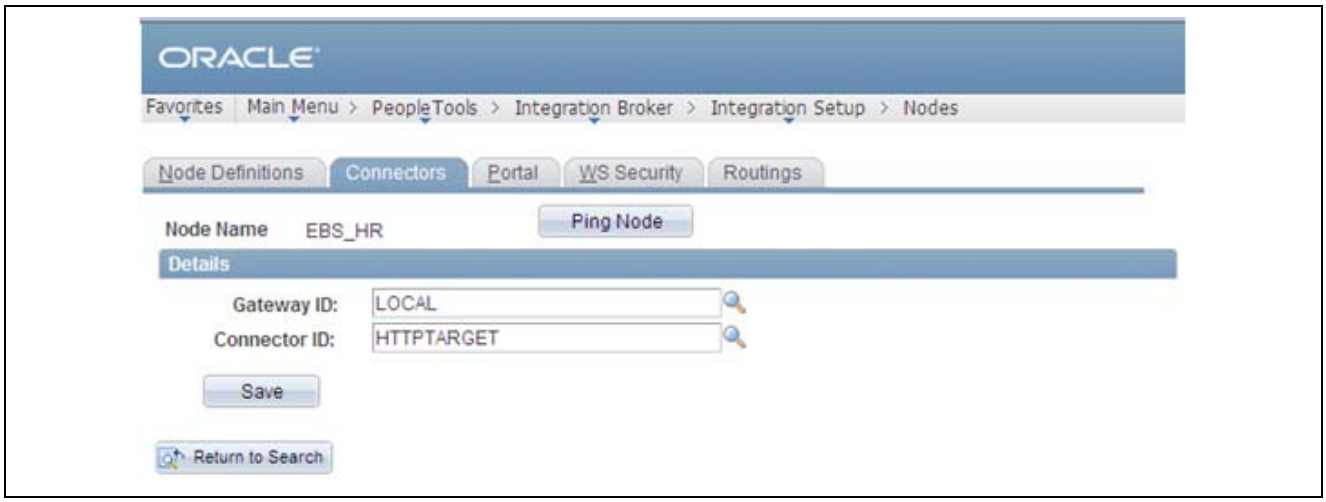

Connectors tab with EBS_HR node connector parameters

a. In the Gateway ID field, enter LOCAL.

b. In the Connector ID field, enter HTTPTARGET.

Refer to the same example to now define the parameters in the Properties section (on the Properties tab), as follows:

c. In the Property ID field of row 1, enter *HEADER.*

d. In the Property Name field of row 1, enter *Content-Type.*

e. Select the Required check box of row 1.

f. In the Value field of row 1, enter *text/xml; charset=utf 8.*

As needed, click the Add button (+) to add another row.

g. In the Property ID field of row 2, enter *HTTPPROPERTY.*

h. In the Property Name field of row 2, enter *Method.*

i. Select the Required check box of row 2.

j. In the Value field of row 2, enter *POST.*

As needed, click the Add button (+) to add another row.

k. In the Property ID field of row 3, enter *HTTPPROPERTY.*

l. In the Property Name field of row 3, enter *SOAPUpContent.*

m. Leave the Required check box of row 3 clear (deselected).

n. In the Value field of row 3, enter *Y.*

As needed, click the Add button (+) to add another row.

The parameters for PRIMARYURL is handled differently than the previous values. For PRIMARYURL, you will use the URL of the WSDL that you generated in Oracle EBS (from step 1: Publish the WSDL by following the instructions in the Oracle EBS Setup Doc). Your PRIMARYURL row should look something like the example PRIMARYURL row, using the values that you generated from Oracle EBS.

o. In the Property ID field of row 4, enter *PRIMARYURL.*

p. In the Property Name field of row 4, enter *URL.*

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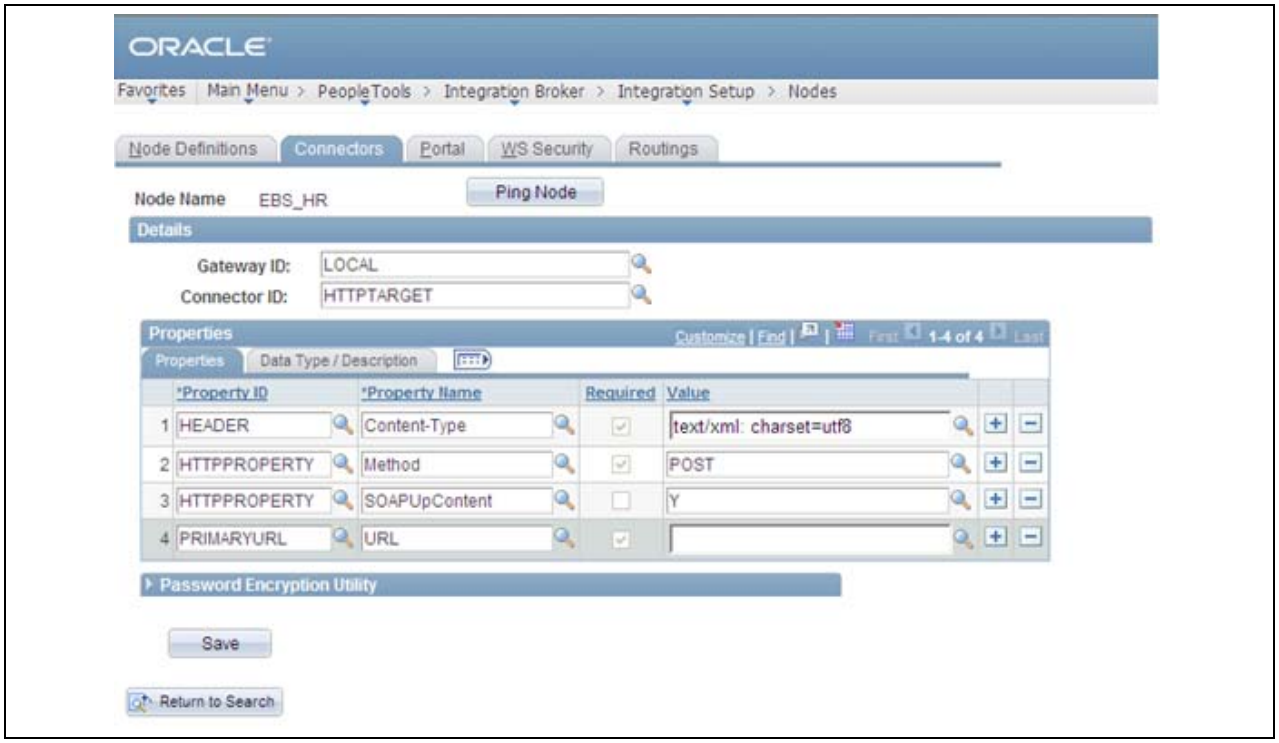
q. Select the Required check box of row 4.

r. In the Value field of row 4, enter *http://<URL of the WSDL generated in Oracle EBS >*.

The following example shows PRIMARYURL pointing to EBS 360 WSDL:



Connectors tab with PRIMARYURL pointing to EBS 360 WSDL

6. Click the WS Security tab to access the WS Security page for the EBS_HR node.

7. Define the EBS_HR node security parameters as shown in the following example:

   a. In the Authentication Token Type field, select *SAML Token* from the drop-down list.

   b. Leave the Encrypted check box and the Use Default User ID check boxe clear.

   c. Click Save.

8. Click the Routings tab to access the Routings page. Verify that the Sender Node is *PSFT_CR* and the Receiver Node is *EBS_HR*.

Task 6-3-3: Verifying Service Operations for PeopleSoft 360-Degree

To verify service operations for PeopleSoft 360-Degree:

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

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

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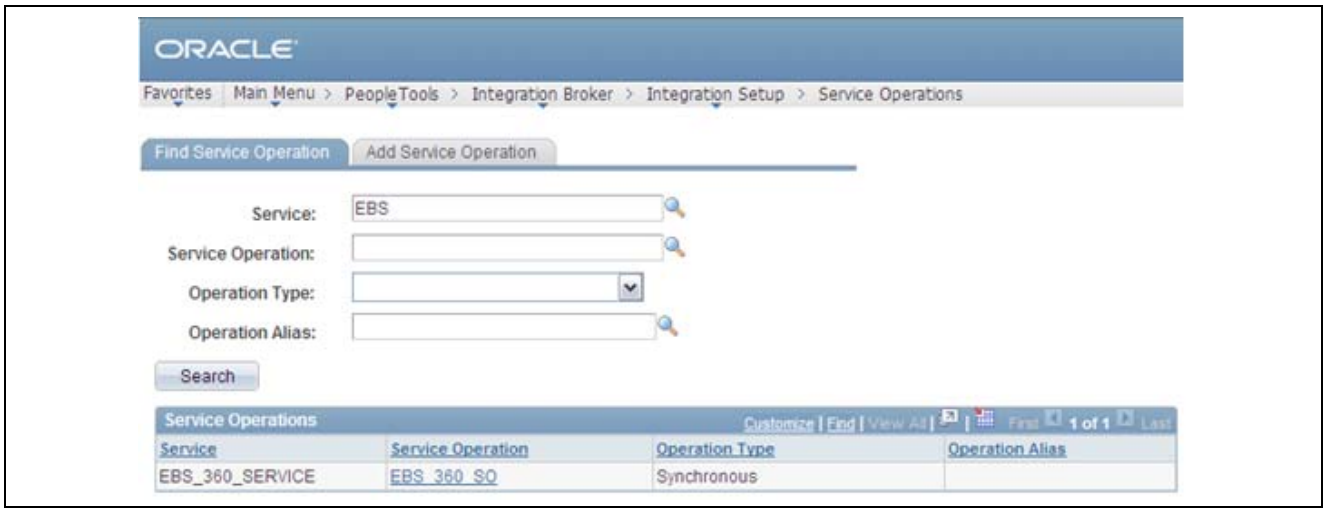

Find Service Operation search page

2. Enter EBS_360_SO in the Find Service Operations search page.
3. Open the EBS_360 Service Operation to verify that EBS_360_SO is active, as shown in the following example:

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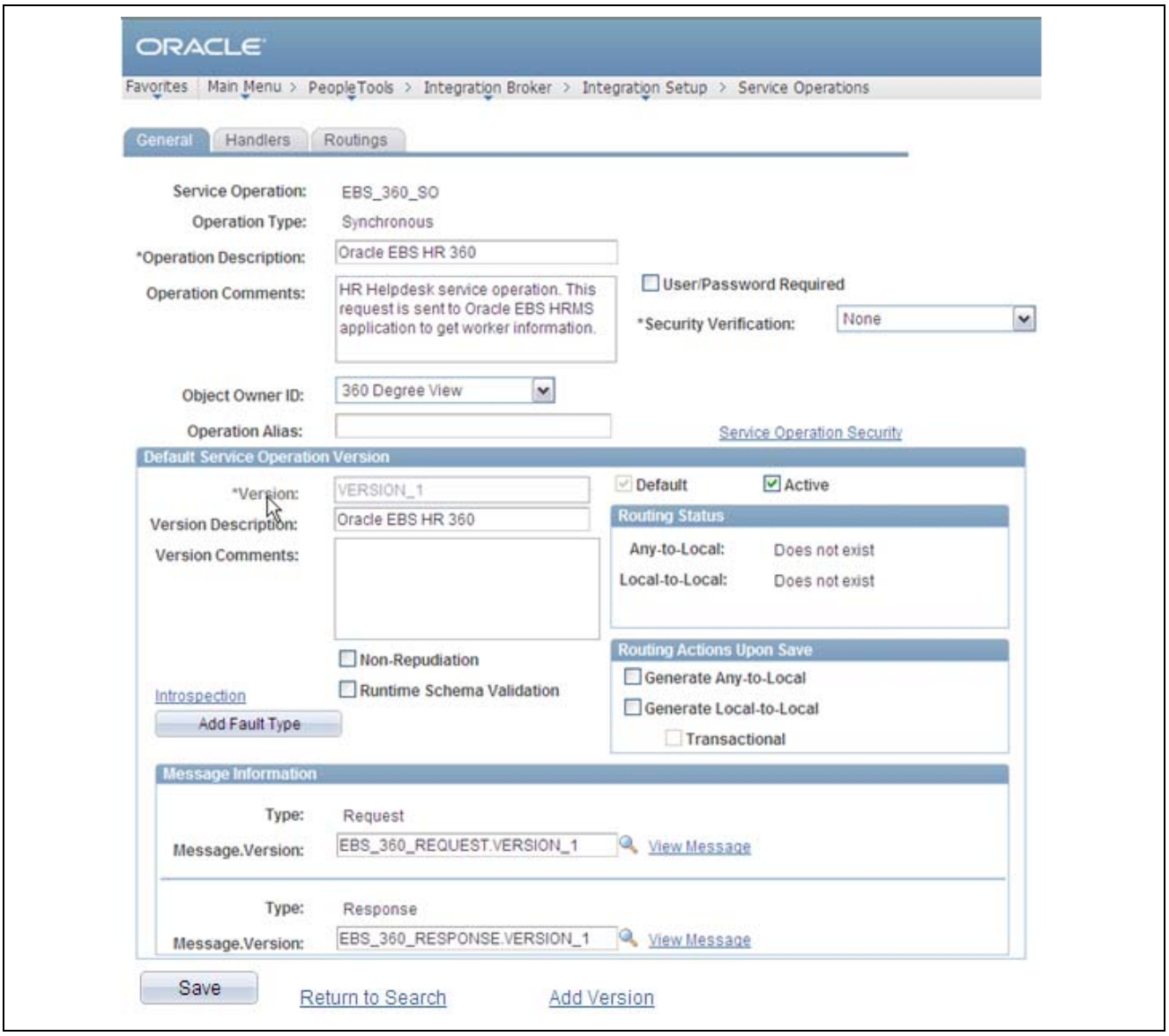

Service Operation: General Page

Task 6-3-4: Verifying Service Operation Handlers for PeopleSoft 360-Degree

From the EBS_360_SO General page in the previous task, click the Handlers tab (alternatively, you can select PeopleTools, Integration Broker, Integration Setup, Service Operations) to access the Handlers page displaying no handlers, as shown in the following example:

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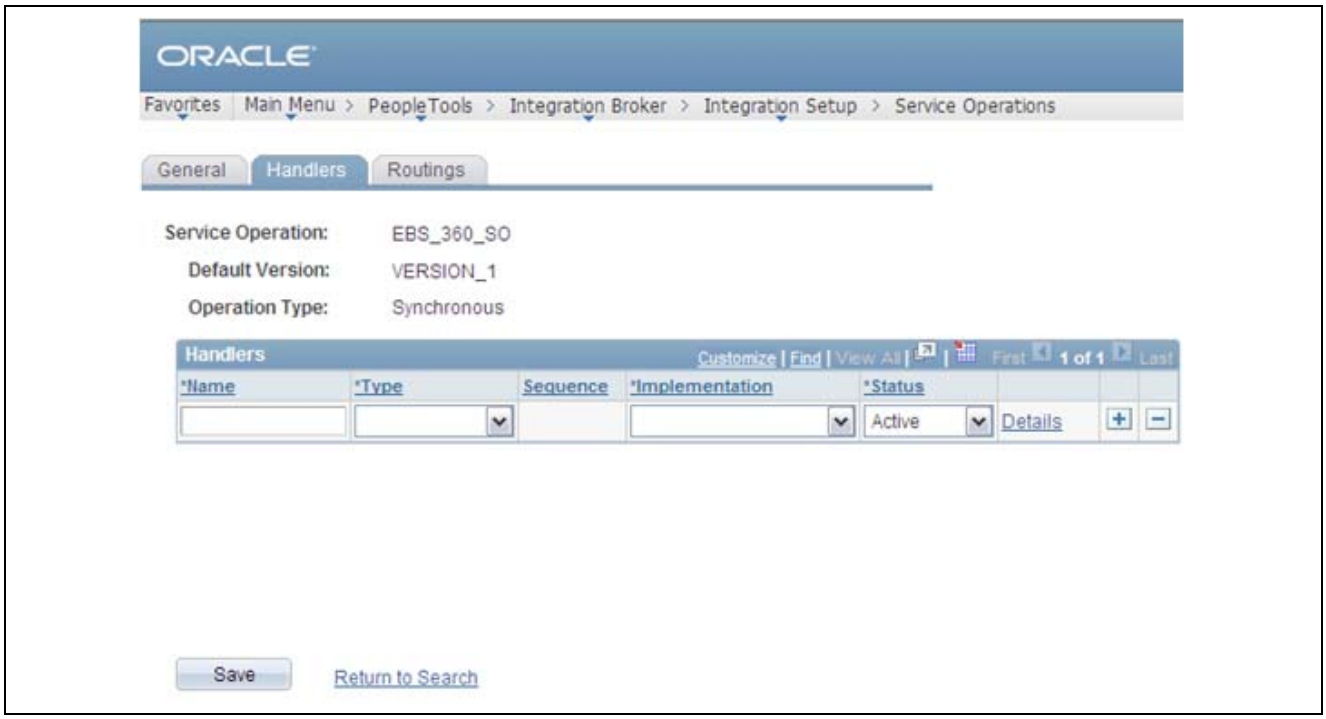
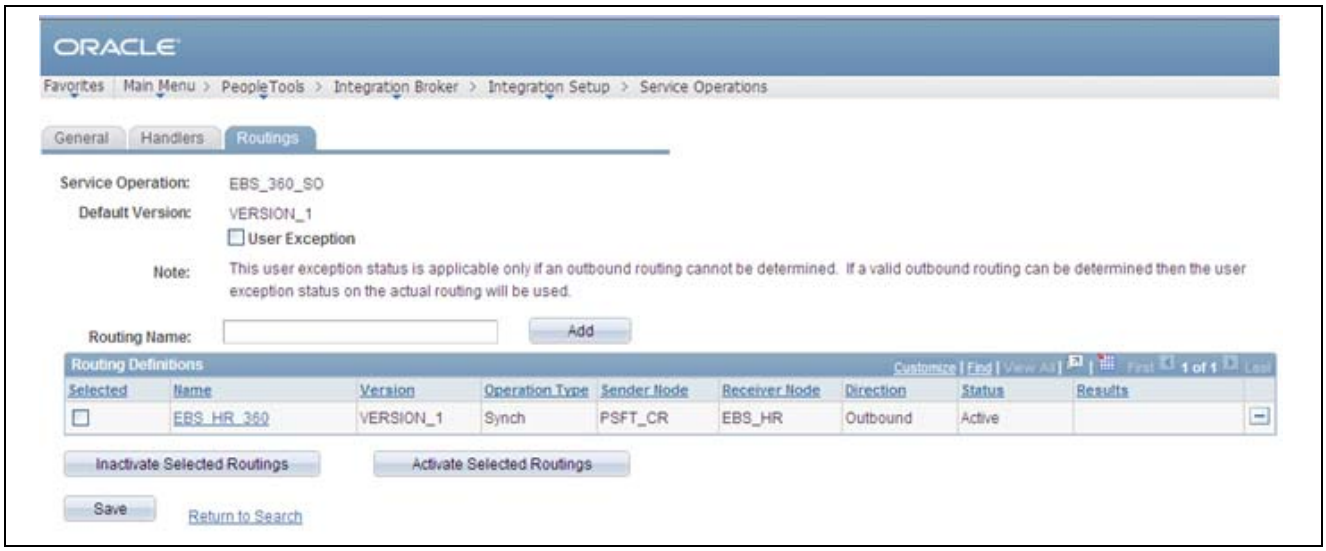


Service Operations - Handlers page for EBS_360_SO

The PeopleSoft 360-Degree Service Operation does *not* contain any handlers, so there is nothing to verify.

Task 6-3-5: Verifying Service Operation Routings for PeopleSoft 360-Degree

From the EBS_360_SO Handlers page in the previous task, click the Routings tab (alternatively, you can select PeopleTools, Integration Broker, Integration Setup, Service Operations) to access the Routings page displaying one outbound routing, as shown in the following example:



Service Operations - Routings page for EBS_360_SO

There should be at least one outbound routing.

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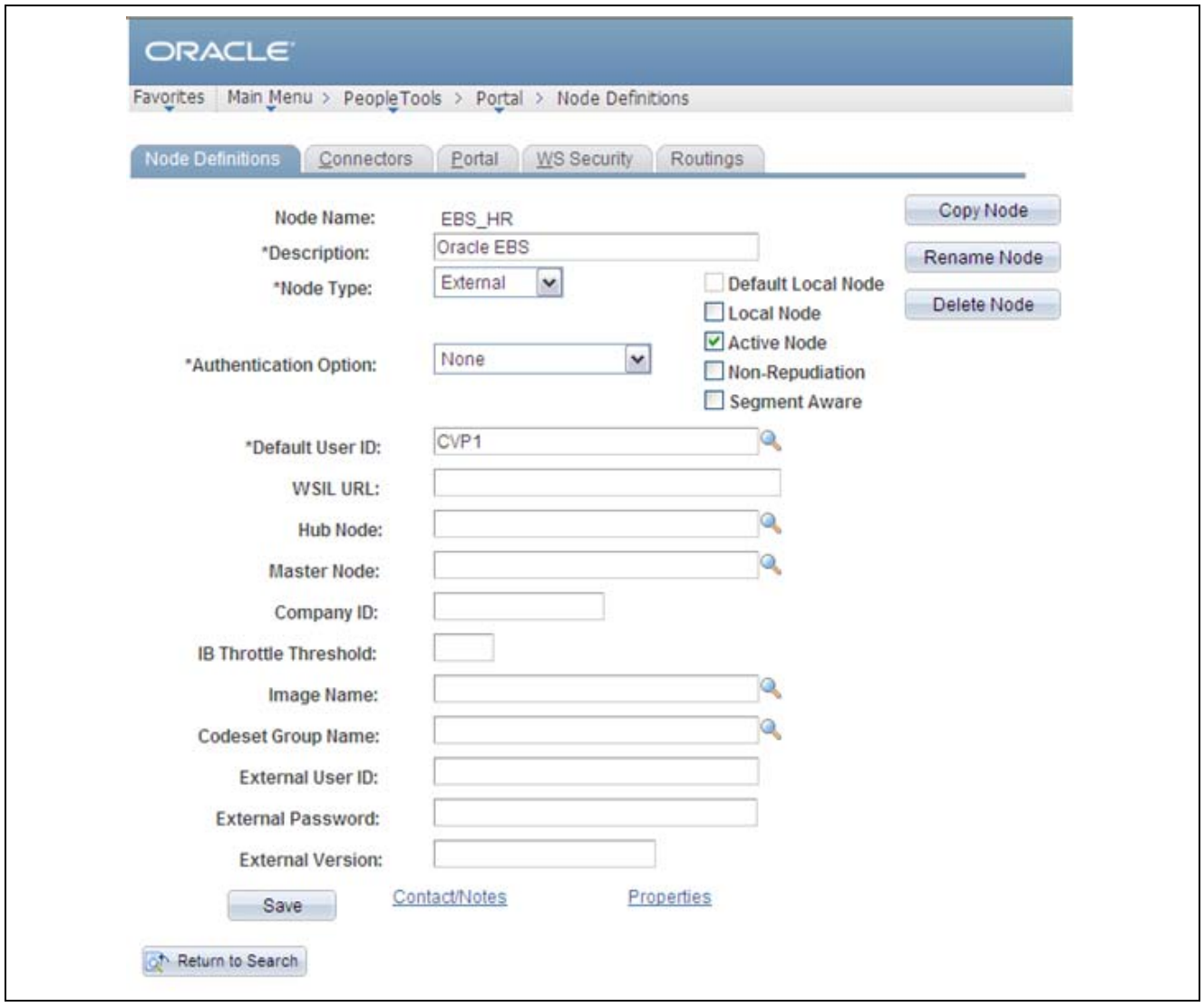
Task 6-4: Setting Up Action Links

The Portal URI Text on the Node Definition for the Oracle EBS database must contain the URI for both the Oracle EBS database and the Oracle Function HR_HELPDESK_SS.

Edit the Portal URI Text field with the following modifications:

1. Select PeopleTools, Portal, Node Definitions.
2. Search for and open the Oracle EBS Node Definition (EBS_HR node).

   This opens the Node Definitions page for the Oracle EBS_HR node, as shown in the following example:



Node Definitions page for EBS_HR node

3. Click the Portal tab to access the Portal page.
4. In the Content URI Text field, enter the following:

   http://<domain>:<port>/OA_HTML/OA.jsp?OAFunc=HR_HELPDESK_SS
5. Click Save.

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Task 6-5: Setting Up Basic Business Events Subscriptions

The following instructions create the subscription for Basic Business Events in the Oracle EBS system. Business Events are an Oracle EBS mechanism that creates and sends messages to the PeopleSoft CRM system whenever a change is made in the Oracle EBS system. This setup is required for Incremental Synchronization processes to function properly.

Each of the Business Events in the following table must be subscribed to by performing steps 2 through 14 in this task.

This table lists business events and the corresponding workflow processes to be mapped:

Business Events	Workflow Process to be Mapped
oracle.apps.per.api.person_address.create_person_address	HRRIR_ADDR_CRE_PRCS
oracle.apps.per.api.person_address.update_person_address	HRRIR_ADDR_CRE_PRCS
oracle.apps.per.api.person_address.update_pers_addr_ with_style	HRRIR_ADDR_CRE_PRCS
oracle.apps.per.api.phone.create_phone	HRRIR_PHO_CRE_PRCS
oracle.apps.per.api.phone.update_phone	HRRIR_PHO_CRE_PRCS
oracle.apps.per.api.job.create_job	HRRIR_JOB_CRE_PRCS
oracle.apps.per.api.job_api.delete_job	HRRIR_JOB_DEL_PRCS
oracle.apps.per.api.job_api.update_job	HRRIR_JOB_UPD_PRCS
oracle.apps.per.api.location.create_location	HRRIR_LOC_CRE_PRCS
oracle.apps.per.api.location.delete_location	HRRIR_LOC_DEL_PRCS
oracle.apps.per.api.location.update_location	HRRIR_LOC_UPD_PRCS
oracle.apps.per.api.organization.create_hr_organization	HRRIR_ORG_CRE_PRCS
oracle.apps.per.api.organization.create_org_information	HRRIR_ORG_CRE_PRCS
oracle.apps.per.api.organization.create_organization	HRRIR_ORG_CRE_PRCS
oracle.apps.per.api.organization.delete_organization	HRRIR_ORG_DEL_PRCS
oracle.apps.per.api.organization.update_org_information	HRRIR_ORG_UPD_PRCS
oracle.apps.per.api.organization.update_organization	HRRIR_ORG_UPD_PRCS
oracle.apps.per.api.employee.create_employee	HRRIR_EMP_CRE_PRCS
oracle.apps.per.api.person.update_person	HRRIR_PER_UPD_PRCS
oracle.apps.per.api.assignment.create_secondary_cwk_asg	HRRIR_WF_CRE_PRCS
oracle.apps.per.api.assignment.create_secondary_emp_asg	HRRIR_WF_CRE_PRCS
oracle.apps.per.api.assignment.final_process_cwk_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.final_process_emp_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.set_new_primary_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.set_new_primary_cwk_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.suspend_cwk_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.activate_emp_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.activate_cwk_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.activate_apl_asg	HRRIR_WF_UPD_PRCS

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Business Events	Workflow Process to be Mapped
oracle.apps.per.api.assignment.accept_apl_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.actual_termination_cwk_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.actual_termination_emp_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.suspend_emp_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.update_apl_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.update_cwk_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.assignment.update_emp_asg	HRRIR_WF_UPD_PRCS
oracle.apps.per.api.ex_employee.actual_termination_emp	HRRIR_PER_UPD_PRCS
oracle.apps.per.api.ex_employee.reverse_terminate_employee	HRRIR_PER_UPD_PRCS

Oracle Business Events are delivered as seed data.

To subscribe to the basic business events in the previous table:

1. Log in to the application using *sysadmin* as your User ID and Password.
2. Select the left hand Responsibility Workflow, Administrator, Web Applications.

   In the Administrator Workflow column, select the menu named Business Events.

   The Business Events page appears.
3. Search for and open the Business Event function, as named in the previous table.

   For example, enter *person_address* and click the Go button to search, as shown in the following example:

Oracle Administrator Workflow - Business Events page

4. If the Business Event is disabled, click the Update icon to access the page where you can select the Enable option.
5. Click the Apply button.
6. Return to the Business Events page and search for and open the Business Event that you just enabled.

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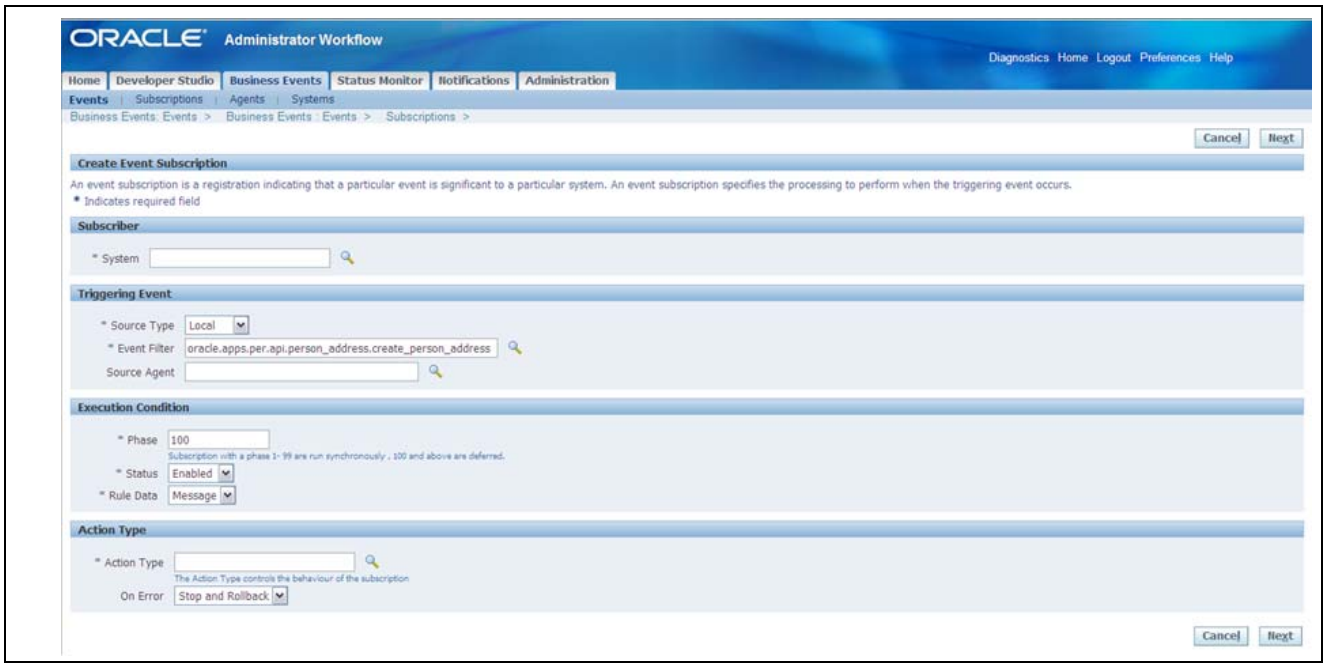
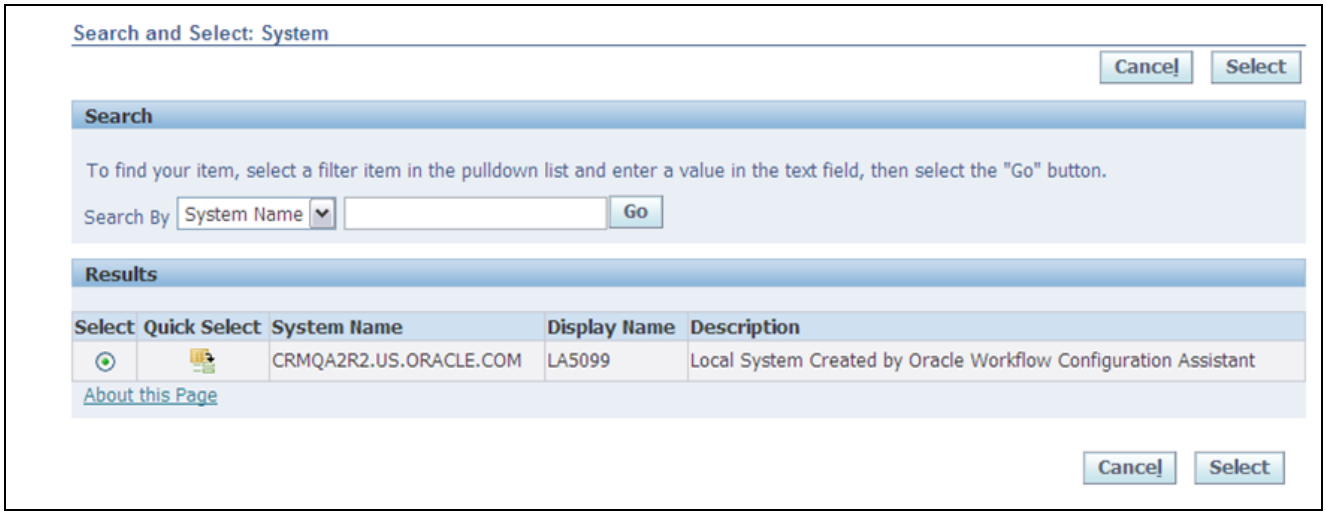
7. Click the Subscription button to access the Subscription page, as shown in the following example:



Business Events - Subscription page

8. On the Subscription page, in the System field, enter the system name.

   For example: *<instance name>.us.oracle.com*, as shown in the following example:



Search and Select: System

   a. To select the System Name, click the radio button to enable.

   b. Click the Select button at the lower right of the page. This returns you to the previous page.

      You can click the Help link to access the instance name.

9. Click the Next button. In the Action Type field, enter *Launch Workflow*, and press the Tab key on your keyboard.

10. In the Workflow Name field, enter *HRRIRPRC*, and then press the Tab key on your keyboard to move to the next field.

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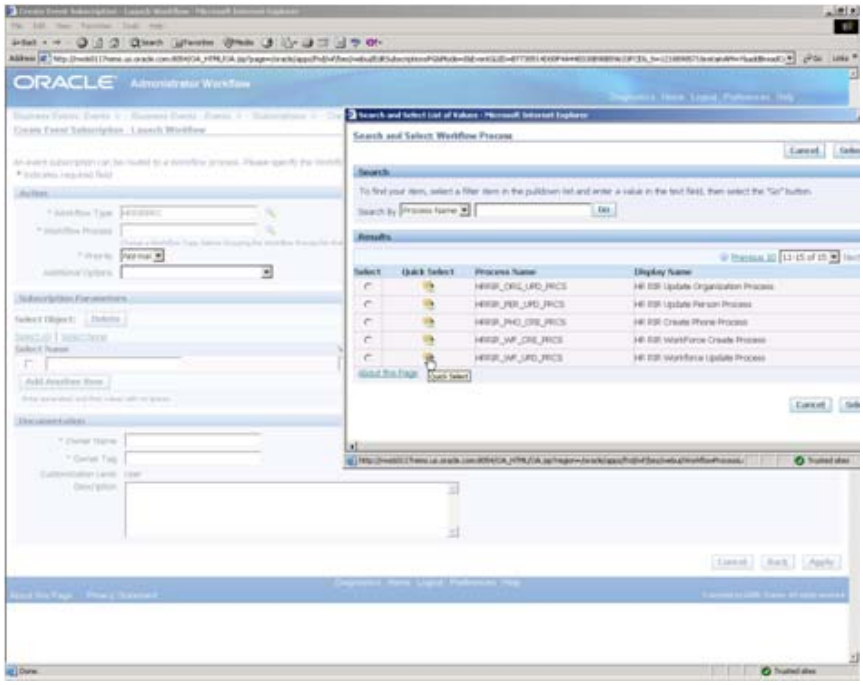
11. Click the Help link to access the Workflow Process, as shown in the following example:



Help link search results

You can refer to the delivered Business Event workflow table, at the beginning of this task, to select the corresponding process name.

12. In the Owner Name field, enter *Human Resources.*
13. In the Owner Tag field, enter *PER.*
14. Click the Apply button, as shown in the following example:

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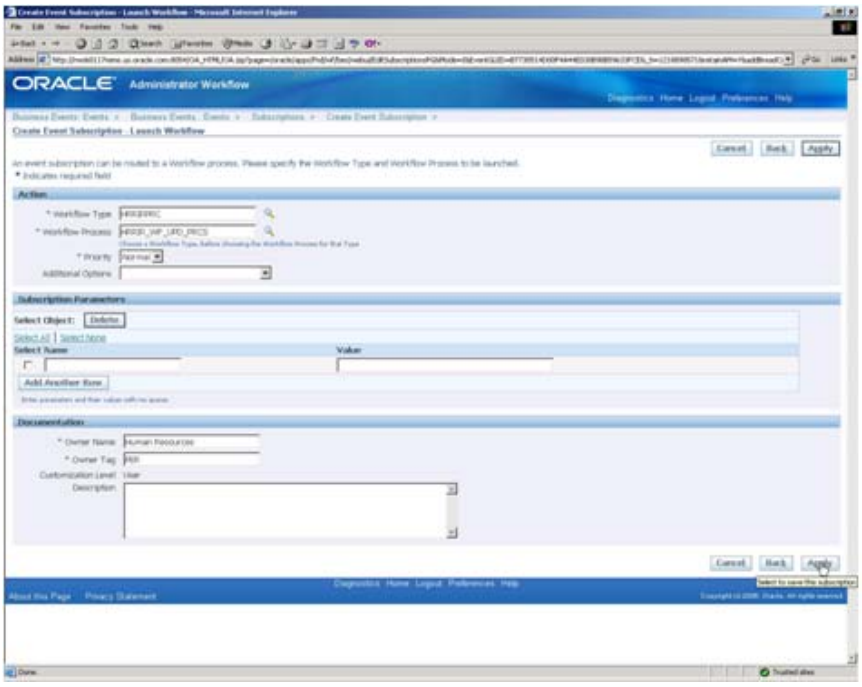

Events Subscriber - Launch Workflow page

15. Repeat the same steps (3-14) for each row defined in the Business Events table.
16. After you complete this set up and you also complete the subscription to the HRHelpdesk specific Business Events, the Regular Incremental Refresh (RIR) events will start to trigger.

Note. RIR (Regular Incremental Refresh) is a term for the process of communicating changes made inside of the Oracle EBS system. Changes are recorded and sent by way of messages to the PeopleSoft CRM system to update the data already sent from the Oracle EBS system. Oracle EBS drives all of the data changes and the PeopleSoft CRM system retains a copy for inquiry and display purposes. The RIR events are a mechanism built within Oracle EBS that is triggered when certain events occur. For example, Name change has a Business Event that generates a workflow process to send a message to the PeopleSoft system with the appropriate key information of the change. Shortly after the Oracle EBS system processes the name change, the information is recorded in the PeopleSoft system.

Refer to the previous table of Business Events to see all of the events (actions) in Oracle EBS that send messages and corresponding changes to the PeopleSoft CRM system, where the change is recorded. When a change occurs in Oracle EBS, these Business Events are triggered automatically, provided they are mapped to a workflow process (steps 3 - 14 of this task).

Task 6-6: Creating New Business Events to Indicate Target URLs

Five additional Business Events and their subscriptions must be created manually. These Business Events are used to retrieve the end-point address (target URLs) to publish the message.

The following are the events that need to be created:

- oracle.apps.per.hrhd.locchange
- oracle.apps.per.hrhd.orgchange

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- oracle.apps.per.hrhd.jobchange
- oracle.apps.per.hrhd.personchange
- oracle.apps.per.hrhd.asgchange

The steps involved to create these Business Events and corresponding subscriptions is similar to the previous task.

1. Select the responsibility *Workflow Administrator Web Applications*.

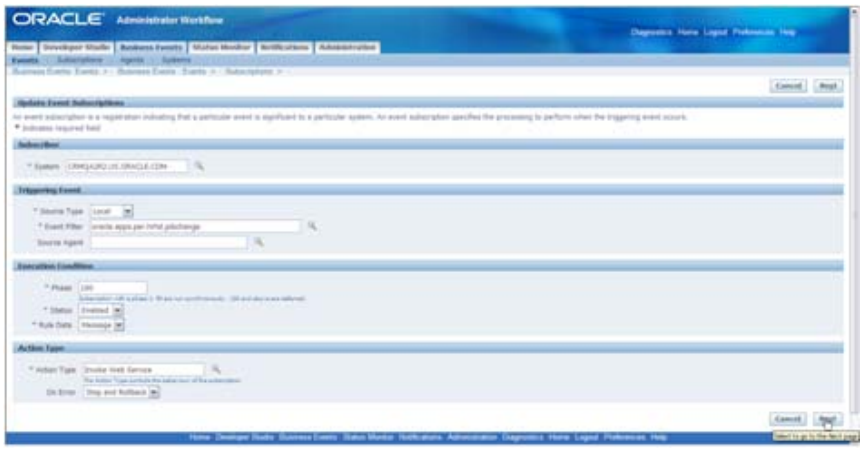
   In Oracle EBS, the left hand menu (referred to as *Responsibility*, and is similar to the PeopleSoft *Role*), is selected from the first page. After you select a responsibility, the next column of menus display that directly correspond to the responsibility that you selected.

2. Navigate to the Business Events Function.
3. In the Event Filter field, enter *oracle.apps.per.hrhd.jobchange*.

   Instead, in the Name field under the Search section, enter *oracle.apps.per.hrhd.jobchange* (this is one of the five new Events to be created).

   Use the Business Events specified in the previous list for the respective RIR.

4. In the Action Type field, enter *Invoke Webservice.*
5. Accept the default values for the remaining fields.
6. Click the Next button to access the Business Events page, as shown in the following example:



Event Subscriptions - Business Events page

7. On the Business Events page, enter the WSDL URL value.

   Refer to the earlier task *Publishing WSDLs for Service Operations for Incremental Sync* for details about how to retrieve the URLs.

8. Accept the default values for the remaining fields to complete the Wizard.

Note. Though the previous list of Business Events exist in your system, you may need to update or add subscriptions to enable them to point to the correct PeopleSoft system.

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Task 6-7: Setting the Encryption Key

You must run the following script in the Oracle EBS database. This sets the encryption keys and must be run before any person fullsync of incremental sync.

Run the script using the SQL Developer:

```
begin
fnd_vault.put('HRHD','CRYPT_KEY',
'AAAAACOREHRAAAAAAAAAACOREHRAAAAAAAAAACOREHRAAAAAAAAAACOAAAAAACOA');
commit;
end;
```

Task 6-8: Applying Patches for Incremental Sync

Apply the following patches for Incremental Sync:

- 7364056:R12.PER.B
- 7496131:R12.PER.B
- 7530917:R12.PER.B (relates to missing events)
- 7550819:R12.PER.B
- 7587316:R12.PER.B

You can also try bouncing the middle tier and Apache server of the EBS instance.

Task 6-9: Publishing the PeopleSoft 360-Degree WSDLs

To publish the PeopleSoft 360-Degree WSDLs:

1. Log in to the system by entering *Sysadmin* in the User ID field and *sysadmin.* in the Password field.
2. Select the Responsibility *Integrated SOA Gateway.*
3. Click the Integration repository tab to access the Integration Repository page, and then click the Search button.

   The Integration Repository is an integral part of Oracle E-Business Suite (EBS). This repository provides a complete catalog of Oracle EBS Business Service Interfaces. This tool enables users to easily discover and deploy the appropriate business service interface from the catalog for integration with any system or business partner.
4. In the Interface Name field, enter or search for *HR Person Record,* and then click the Go button, as shown in the following example:

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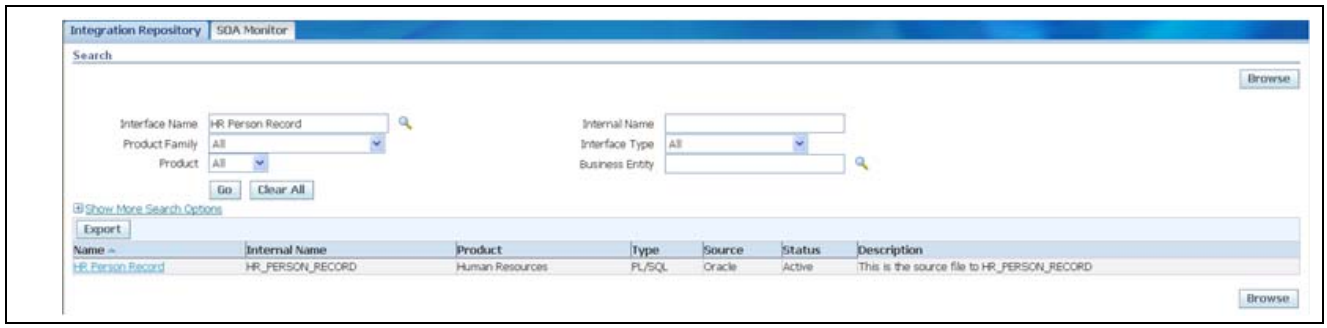
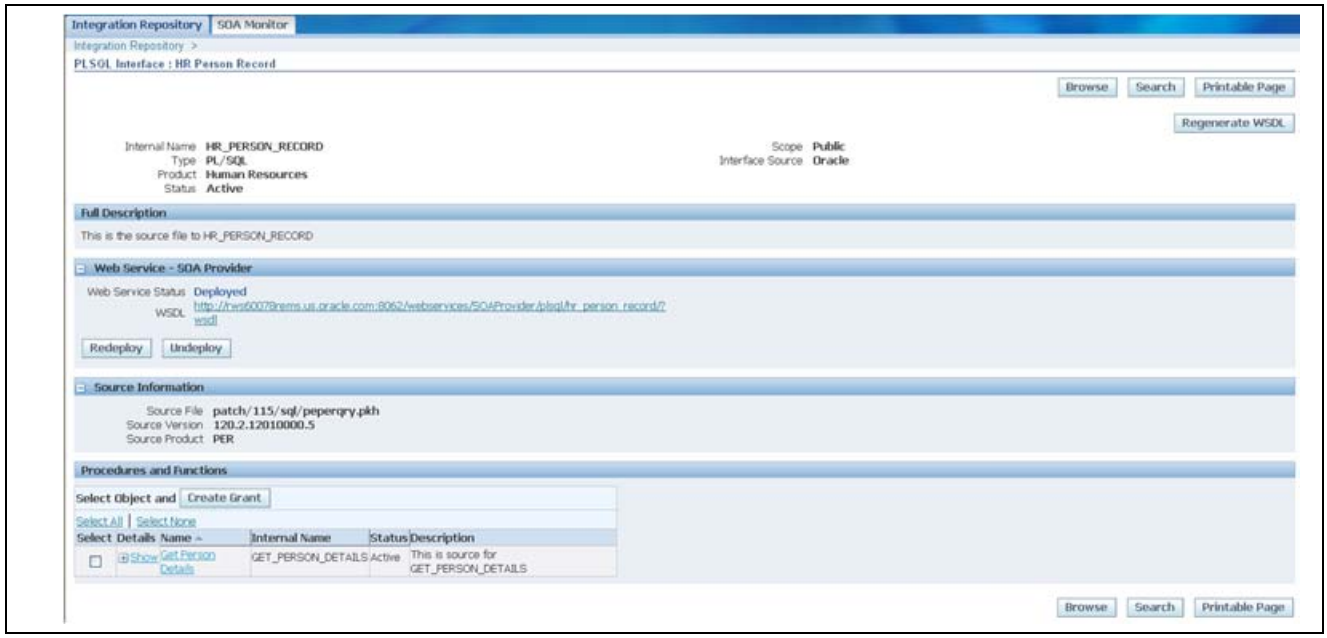


Integration Repository - search for HR_Person_Record

5. In the Name field, click the *HR Person Record* link from the search results.
6. Click the Generate WSDL button.

   The Generate WSDL button is enabled for your first generation, then changes to the Regenerate WSDL button for subsequent generations, as shown in the following example:



Integration Repository - PLSOL Interface: HR Person Record

7. The URL displays in the Web Service - SOA Provider section of the Integration Repository page.
8. Click the Deploy button.

   The Deploy button is enabled for your first deployment, and then changes to the Redeploy button for subsequent deployments.
9. Select the row in the Procedures and Functions section and click the Create Grants button to access a new page, as shown in the following example:

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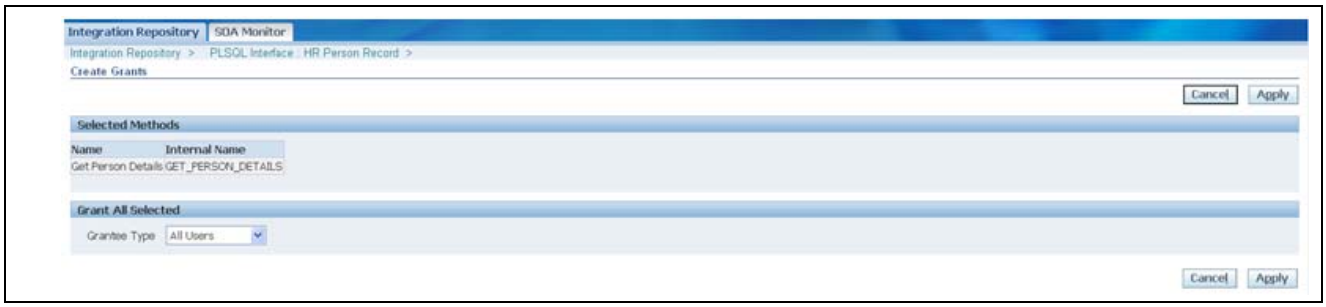


PSSQL Interface: HR Person Record - Create Grants page

10. In the Grant Type field, select *All Users* from the drop-down list, and then click the Apply button.
11. Copy the WSDL (the URL that displays in the Web Service - SOA Provider section of the Integration Repository page in the earlier step).

    Use this to configure the EBS_HR node for PeopleSoft 360-Degree.

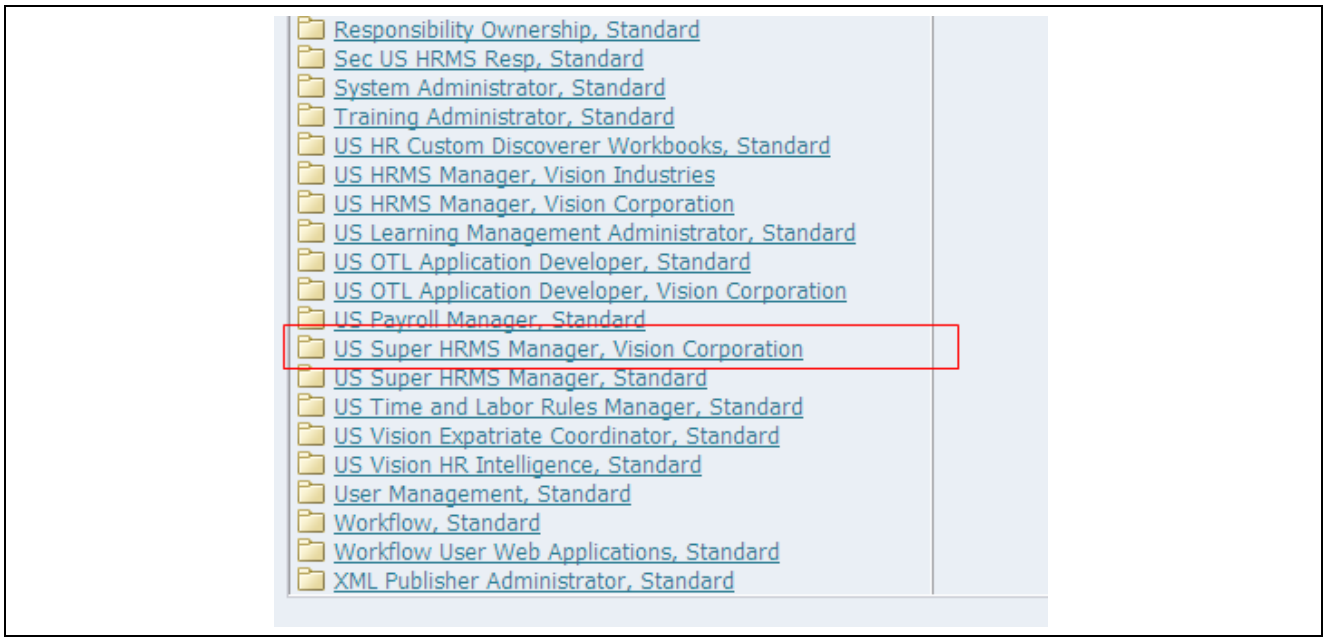
Task 6-10: Verifying Set Up Between PeopleSoft CRM and Oracle EBS

Use this scenario as an example that describes how to verify the set up between PeopleSoft CRM and Oracle EBS.

This example is for Incremental Sync.

1. Log in to the Oracle EBS database by entering *hrms* in the User ID field, and *welcome* in the Password field.
2. Navigate to the first menu responsibility: US Super HRMS Manager, Vision Corporation.

   Responsibility refers to the left hand menu column, as shown in the following example:



Responsibility left hand menu column

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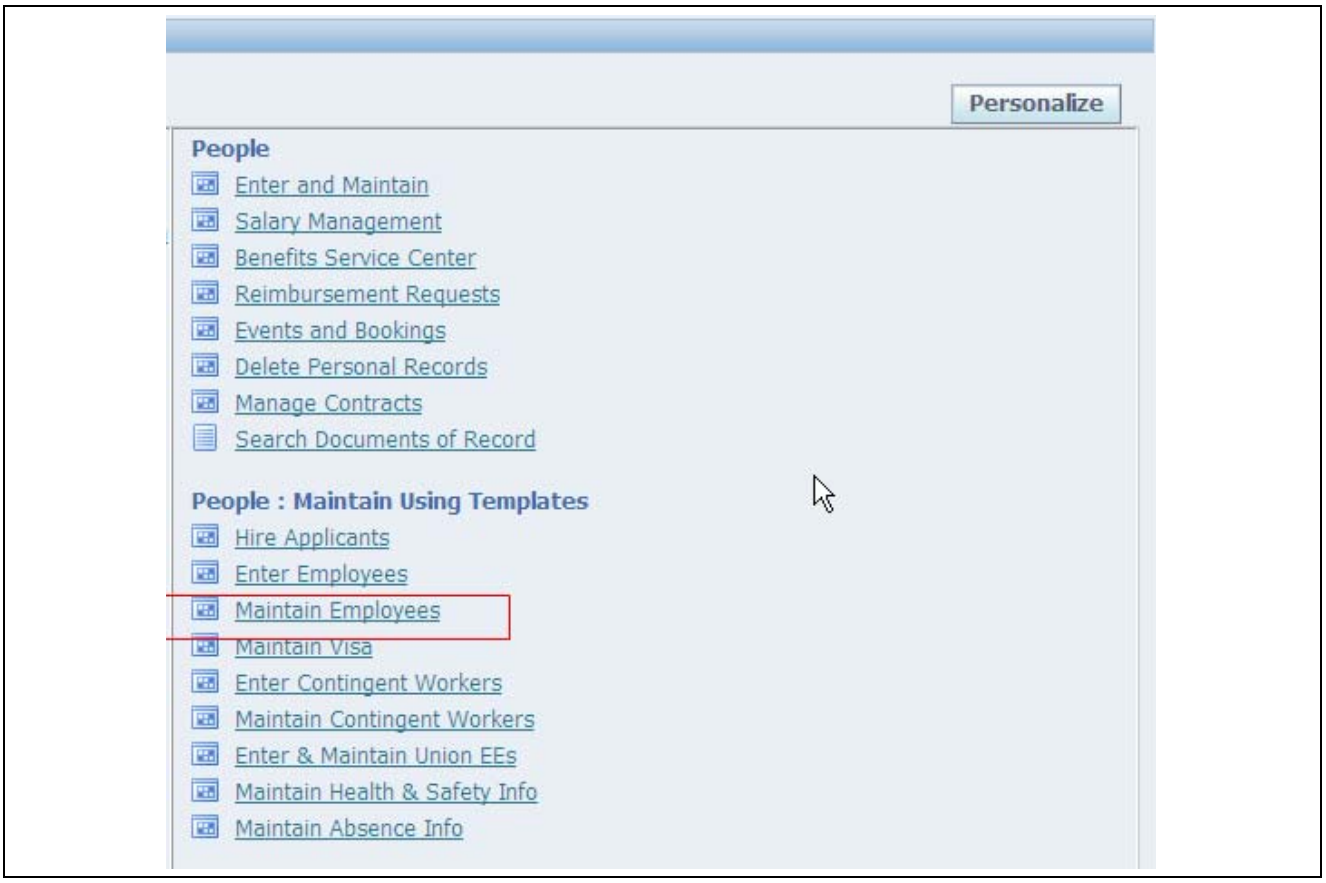
3. Navigate under People: Maintain using Templates select menu: Maintain Employees, as shown in the following example:



People: Maintain Using Templates: Maintain Employees

4. Open left hand navigation by People Name, open *D* and select the name Dale, Allen.
5. When the People Management Data Organizer displays, click the Show Details button, as shown in the following example:

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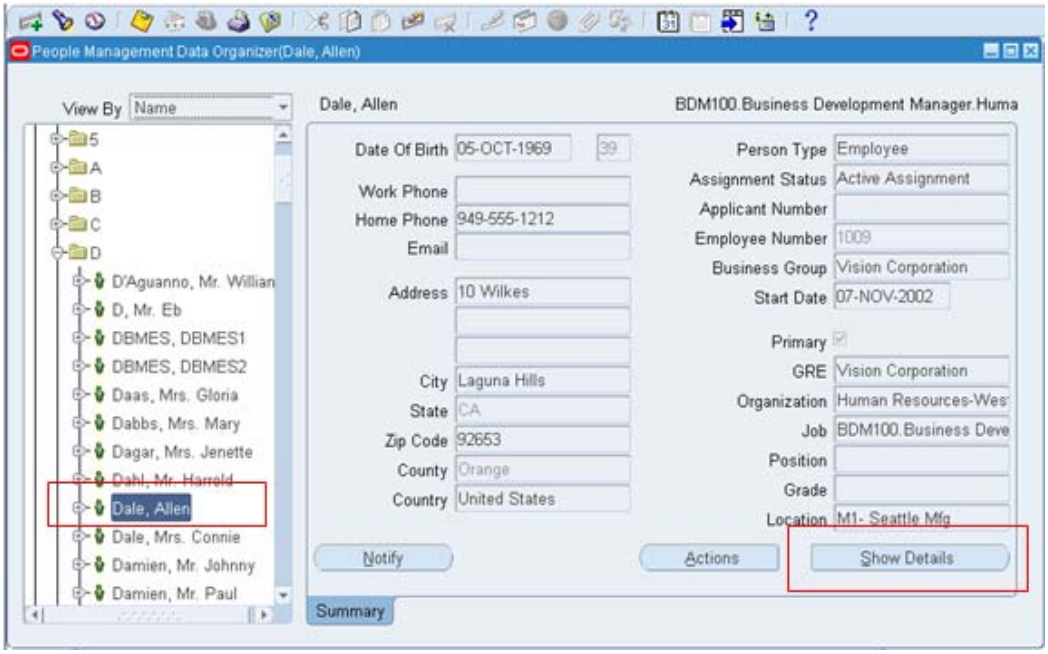
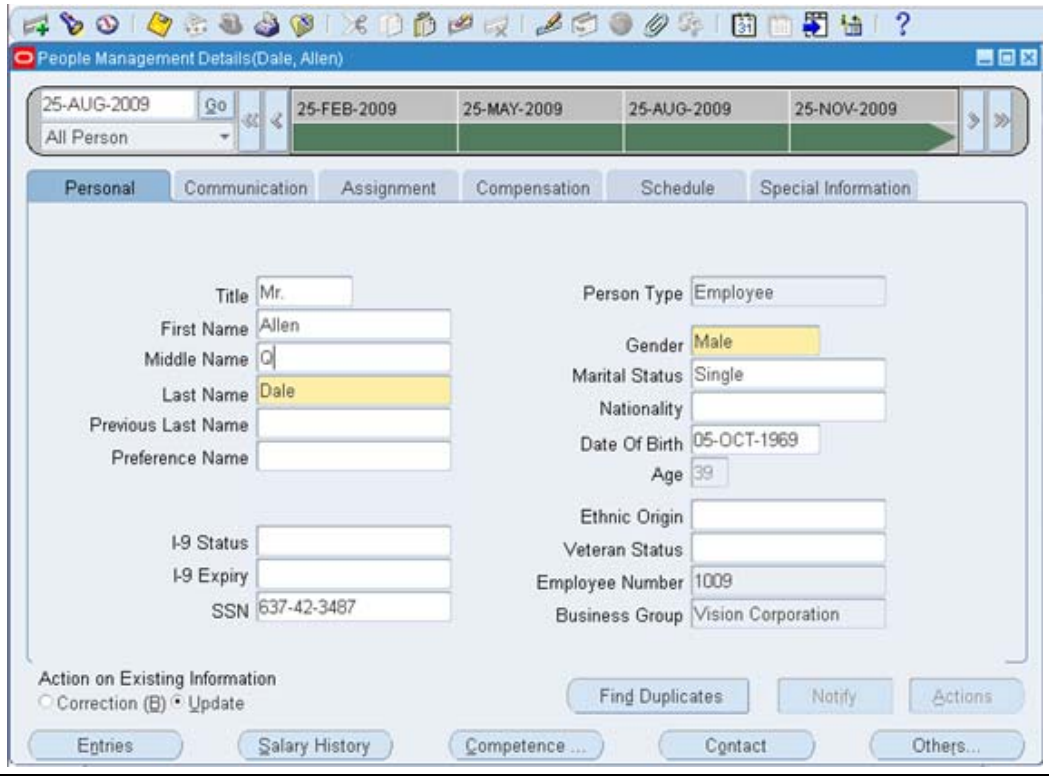


PeopleSoft Management Data Organizer

6. In the Middle Name field, enter *Q*, and then click the Save icon on the menu bar, as shown in the following example:



PeopleSoft Management Data Organizer - Personal page

7. Navigate to the PeopleSoft CRM system that you integrated with the Oracle EBS environment.
8. Log in by entering *VP1* in the User ID field and *VP1* in the Password field.

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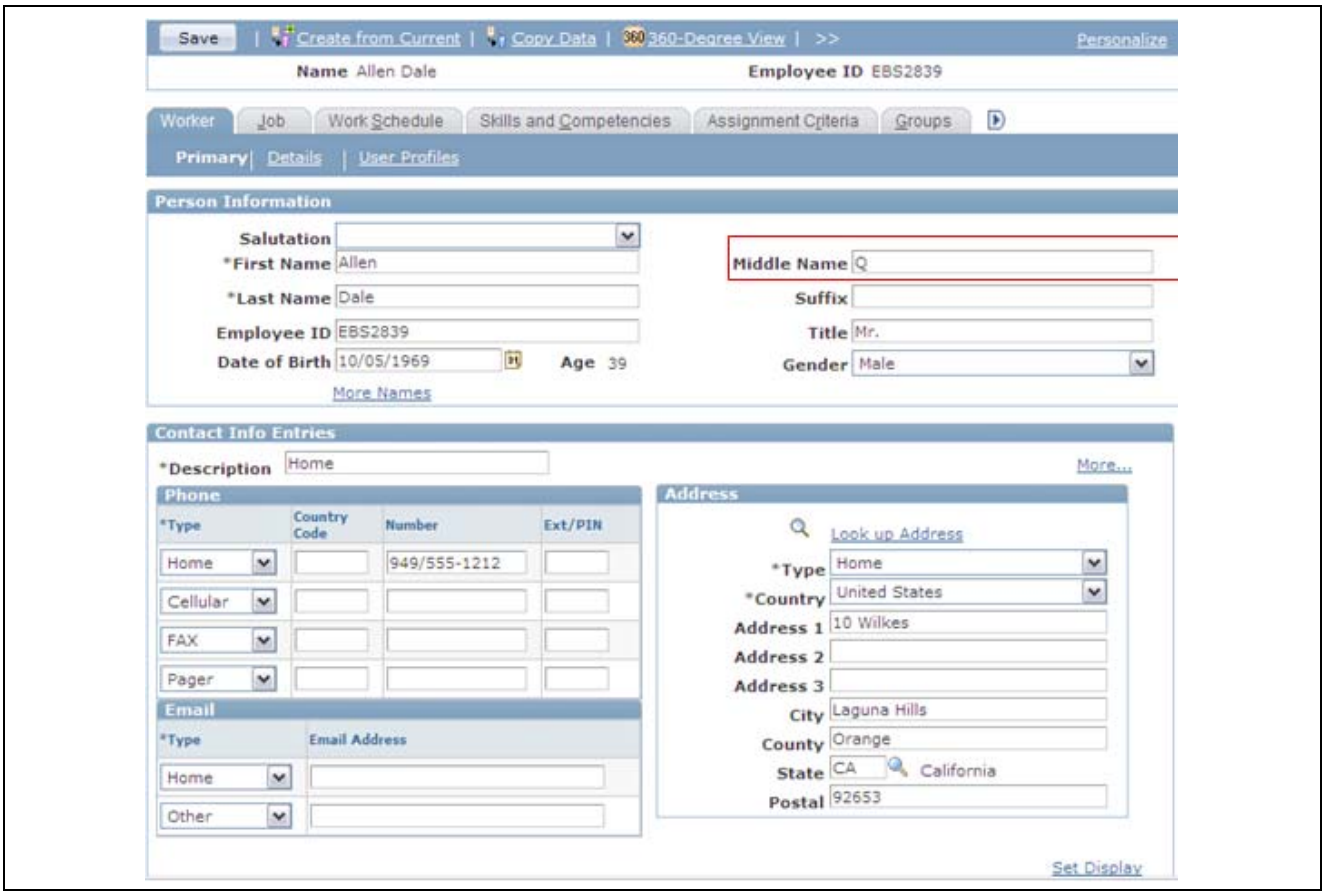
9. Navigate the CRM menu: Workforce, Search Worker.
10. In the First Name field, enter *Allen.*
11. In the Last Name field, enter *Dale.*
12. Click the Search button.
13. When the Worker page appears, notice that the Middle Name field has a value of *Q*, as shown in the following example:



Worker page

This confirms that the connection between the PeopleSoft CRM database and the Oracle EBS environment is valid and working properly.

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CHAPTER 7

Integrating PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 with HRHD

This chapter discusses:

- Understanding PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 Integration
- Prerequisites
- Setting up the PeopleSoft HCM 9/9.1 Database
- Setting Up the PeopleSoft CRM 9.1 Database

Understanding PeopleSoft CRM 9.1 and PeopleSoft HRMS 9/9.1 Integration

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). The EIP enables access to the PeopleSoft HelpDesk for Human Resources (HRHD) Worker 360-Degree View from PeopleSoft CRM.

Prerequisites

Before you can begin the PeopleSoft CRM and PeopleSoft HRMS integration tasks in this chapter, you must complete these requirements:

- Install and configure a PeopleSoft CRM 9.1 database.
- Install and configure a PeopleSoft HRMS 9 or 9.1 database.

Task 7-1: Setting up the PeopleSoft HCM 9/9.1 Database

This section discusses:

- Setting Up the Gateway for PeopleSoft CRM and PeopleSoft HCM
- Accessing the PeopleSoft CRM Local Node Definition
- Accessing the PeopleSoft HCM Local Node Definition

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- Adding PeopleSoft CRM Trusted Node for Single Signon
- Accessing HD_360_REQUEST_SYNC Service Operation
- Adding a PeopleSoft CRM Active Routing for Version 2
- Running Row Level Security in PeopleSoft HCM

Task 7-1-1: Setting Up the Gateway for PeopleSoft CRM and PeopleSoft HCM

A gateway must be set up between the PeopleSoft CRM and PeopleSoft HCM systems. PSFT_CR is the delivered local node on the PeopleSoft CRM system. PSFT_HR is the delivered local node on the PeopleSoft HCM system. The gateway URL defines these two nodes in the gateway property.

To set up the gateway in both the PeopleSoft CRM and PeopleSoft HCM systems:

1. In the PeopleSoft CRM system, access the Gateways page by selecting PeopleTools, Integration Broker, Configuration, Gateways.

   For example: http://<webserver machine name><port>/PSIGW/PeopleSoftListeningConnector

2. Search for and open the LOCAL gateway, as shown in the following example:

Gateways page

   On the Gateways page, do the following:

   a. Click the Save button to save the page.

   b. Click the Load Gateway Connectors button. You will receive a message *"Loading process was successful."*

   c. Acknowledge the message.

   d. Click Save to save the page again.

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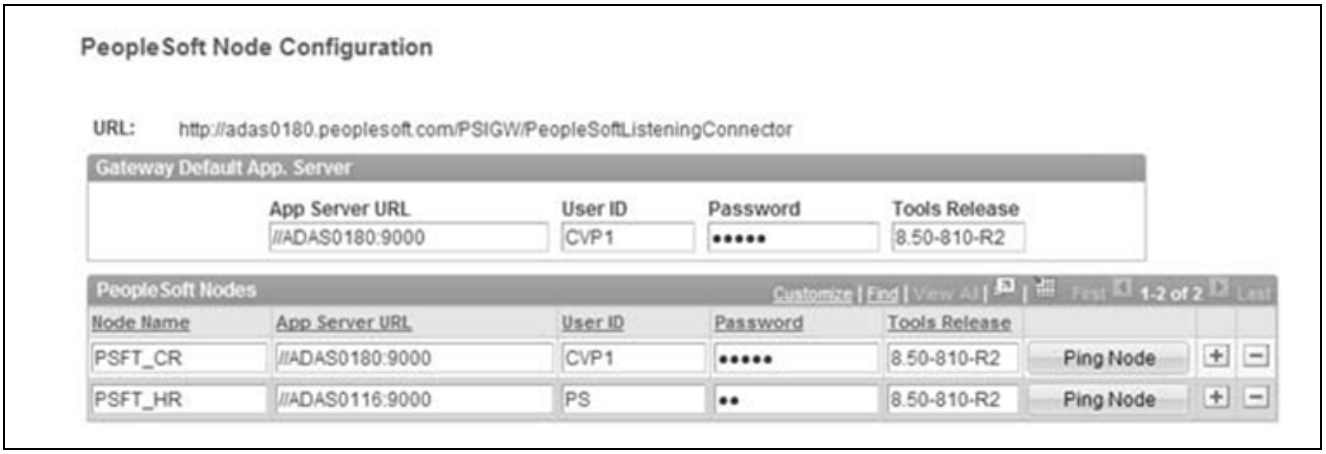
e. Click the Ping Gateway button, to test your ping and verify that it is successful, as shown in the following example:

PeopleSoft Listening Connector

3. Click the Gateway Setup Properties link to set up local and remote nodes in the gateway.
4. Log in to the Gateway Setup Properties.

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



PeopleSoft Node Configuration page

5. In the PeopleSoft Nodes grid, click the Add (+) button to add the local and remote node information:
   a. In the Node Name column, enter the node name.
   b. In the App Server URL column, enter the application server URL.
   c. In the User ID column, enter the user ID.
   d. In the Password column, enter the password.
   e. In the Tools Release column, enter the PeopleSoft PeopleTools release number.
6. Click Save.
7. Click the OK button to return to the Gateway page.
8. Click Save to save the Gateway page again.
9. Repeat the same Gateway set up steps in the PeopleSoft HCM system.

Task 7-1-2: Accessing the PeopleSoft CRM Local Node Definition

In the following examples, C910RAB is the PeopleSoft CRM 9.1 local node.

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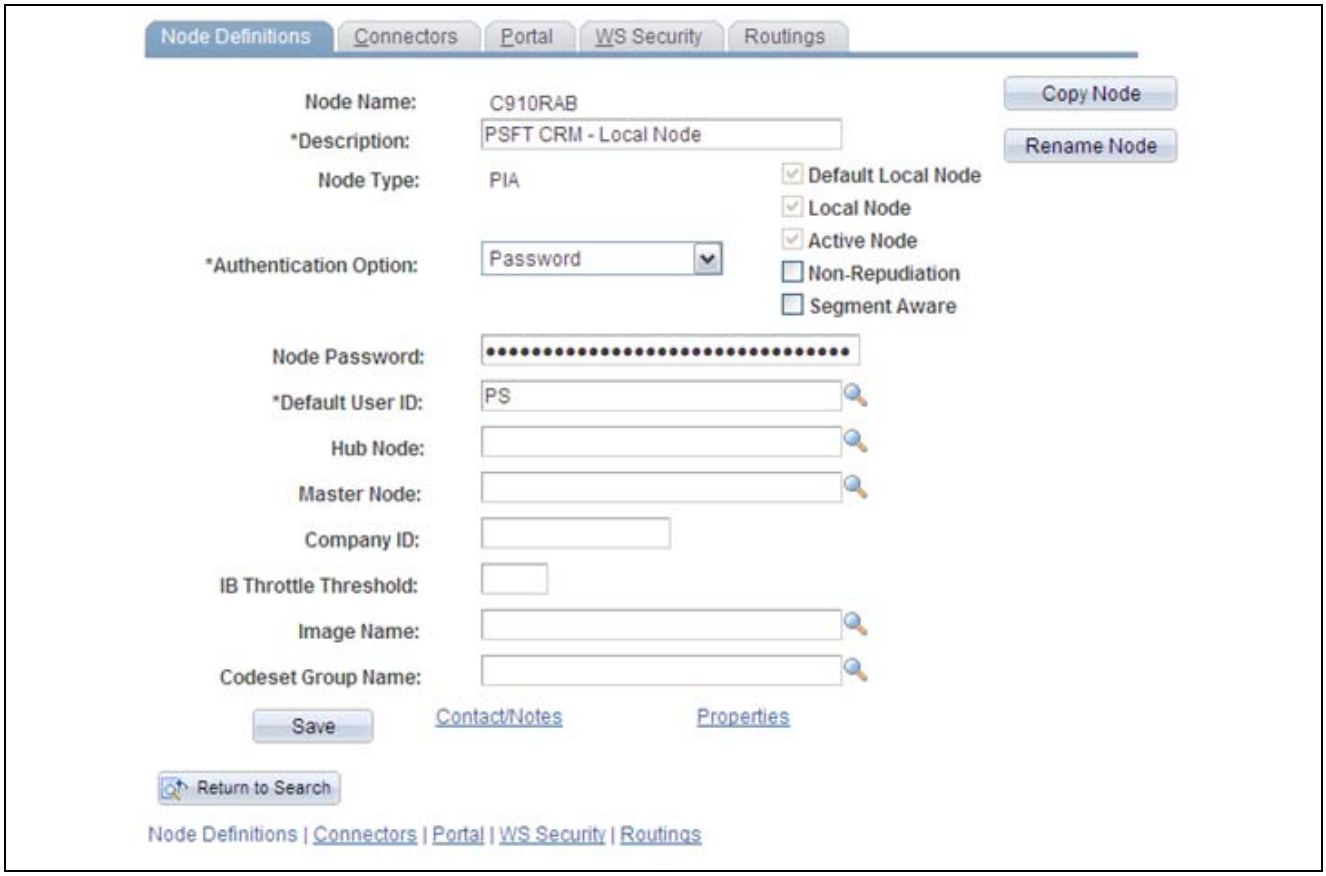
Note. Implement all the remaining steps to setup PeopleSoft HCM 9/9.1 database in the HCM system.

To set up the PeopleSoft CRM 9 or 9.1 Database:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the CRM local node. For example, *C910RAB.*
2. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:



Node Definitions page

3. Use this example to complete the Node Definitions page:

   Note. The data you enter will differ and be specific to your system and set up.

   a. In the Node Type field, select *PIA* (PeopleSoft Pure Internet Architecture) from the drop-down list.

   b. If the Node Type field is enabled for selection, select *PIA* (PeopleSoft Pure Internet Architecture).

      Otherwise, PeopleSoft Pure Internet Architecture is already your default selection.

   Note. For the Authentication option, you can select either *No Authentication* or *Password Authentication.* If you select *Password Authentication,* you must define the same node password in both the PeopleSoft CRM and PeopleSoft HCM databases. The default password is *PSOFT.*

4. Select the Connectors tab to access the Connectors page, as shown in the following example:

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Connectors page

5. Click the Gateway Setup Properties link to access the Gateway Properties page, as shown in the following example:

Gateway Properties page

6. Login using the administrator and password to verify that the gateway settings are defined as shown in the following example:

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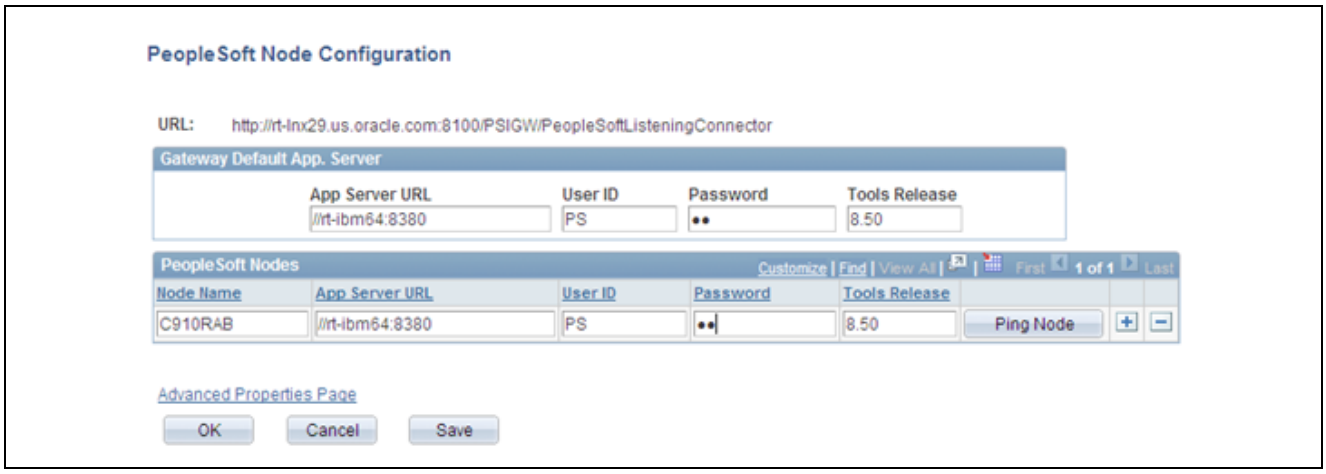

PeopleSoft Node Configuration page

7. On the Gateway Properties page, ensure that there is a row for C910RAB and that it contains the correct URL for that database.
8. Click Save.

Task 7-1-3: Accessing the PeopleSoft HCM Local Node Definition

In the following examples, H910RAA is the PeopleSoft HCM 9 local node. The set up is the same for the PeopleSoft HCM 9 or 9.1 database.

To access the PeopleSoft HCM local node definition:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the HCM local node. For example, *H910RAA.*
2. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:

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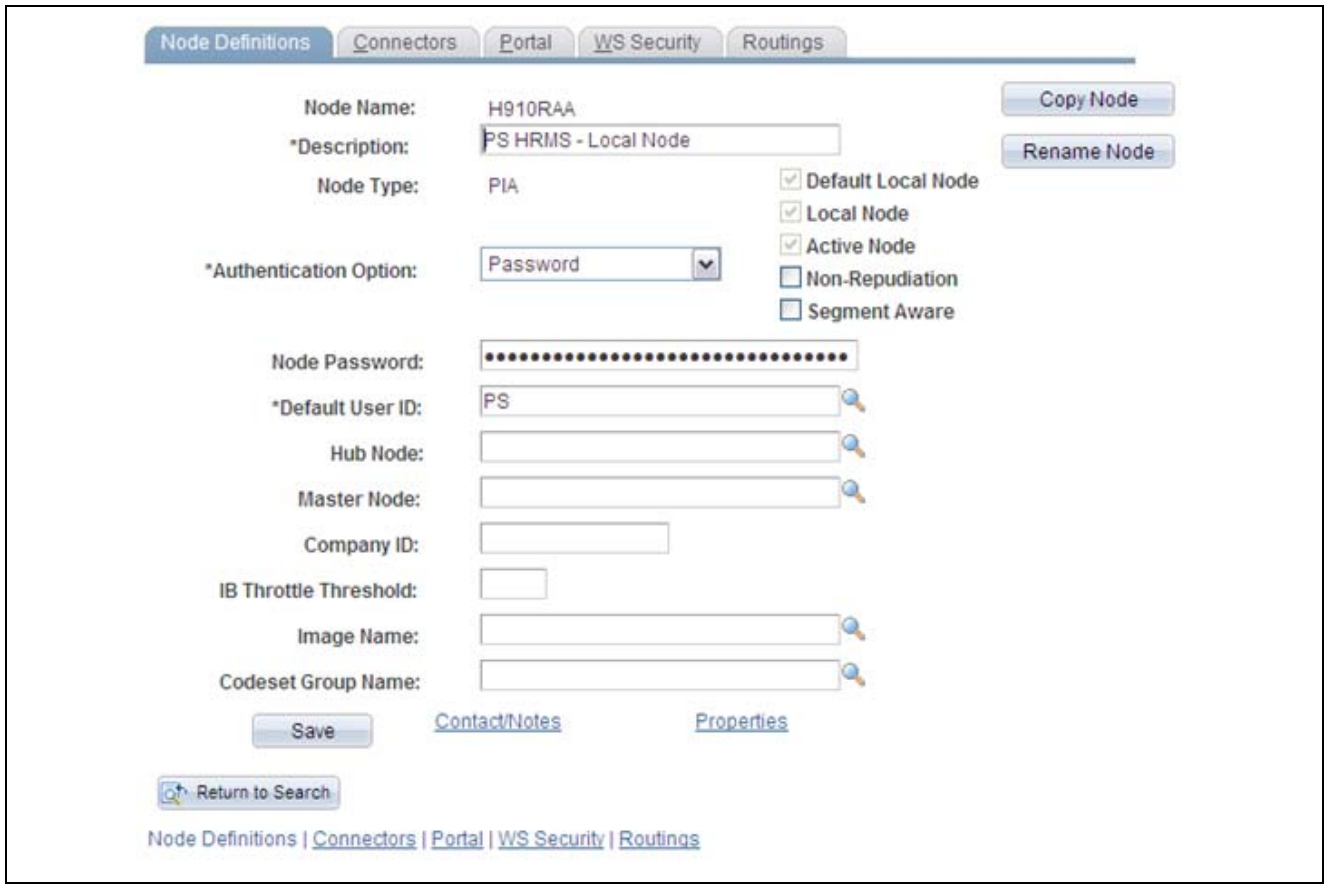

Node Definitions page

3. Use this example to complete the Node Definitions page:

Note. The data you enter will differ and be specific to your system and set up.

---

a. In the Node Type field, select *PIA* (PeopleSoft Pure Internet Architecture) from the drop-down list.

b. In the Authentication Option field, select either *No Authentication* or *Password Authentication* from the drop-down list.

Note. For the Authentication option, you can select either *No Authentication* or *Password Authentication.* If you select *Password Authentication,* you must define the same node password in both the PeopleSoft CRM and PeopleSoft HCM databases. The default password is *PSOFT.*

---

4. Select the Connectors tab to access the Connectors page, as shown in the following example:

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Connectors page

5. Click the Gateway Setup Properties link to access the Gateway Properties page, as shown in the following example:

Gateway Properties page

6. Login and ensure that there is a row for H910RAA and that it contains the correct URL for that database, as shown in the following example:

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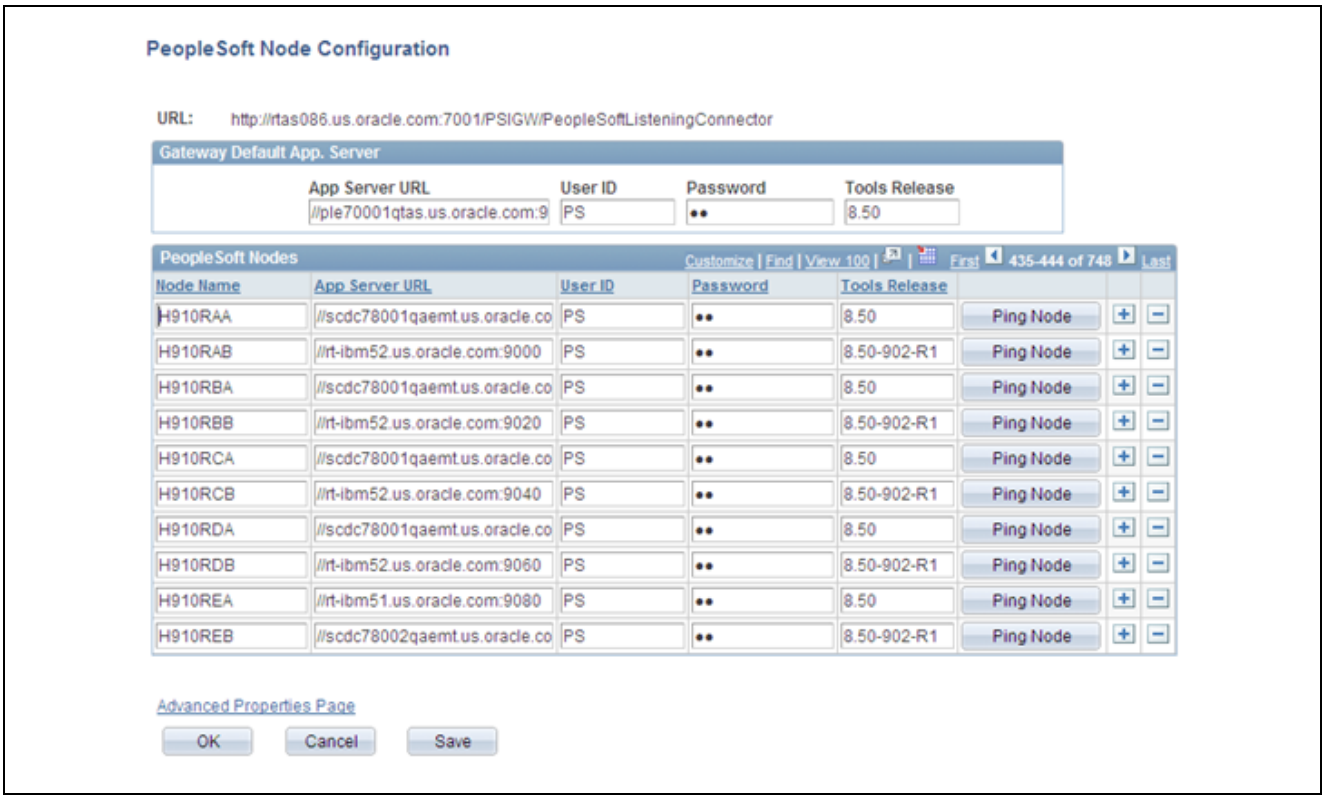


PeopleSoft Node Configuration page

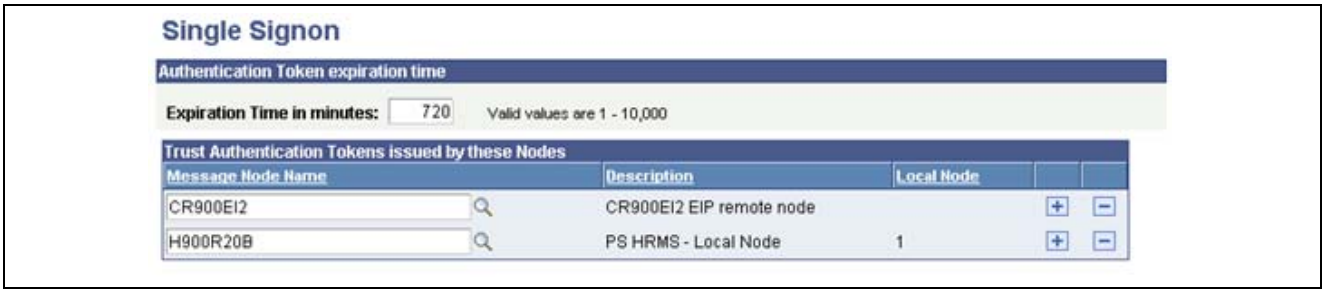
7. Click Save.

Task 7-1-4: Adding PeopleSoft CRM Trusted Node for Single Signon

To add the PeopleSoft CRM trusted node to enable PeopleSoft Single Signon:

1. Select Home, PeopleTools, Security, Security Objects, Single Signon.

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



Single Signon page

2. Add a row for the PeopleSoft CRM local node.

   For example, *C910R20B.*

3. Click Save.

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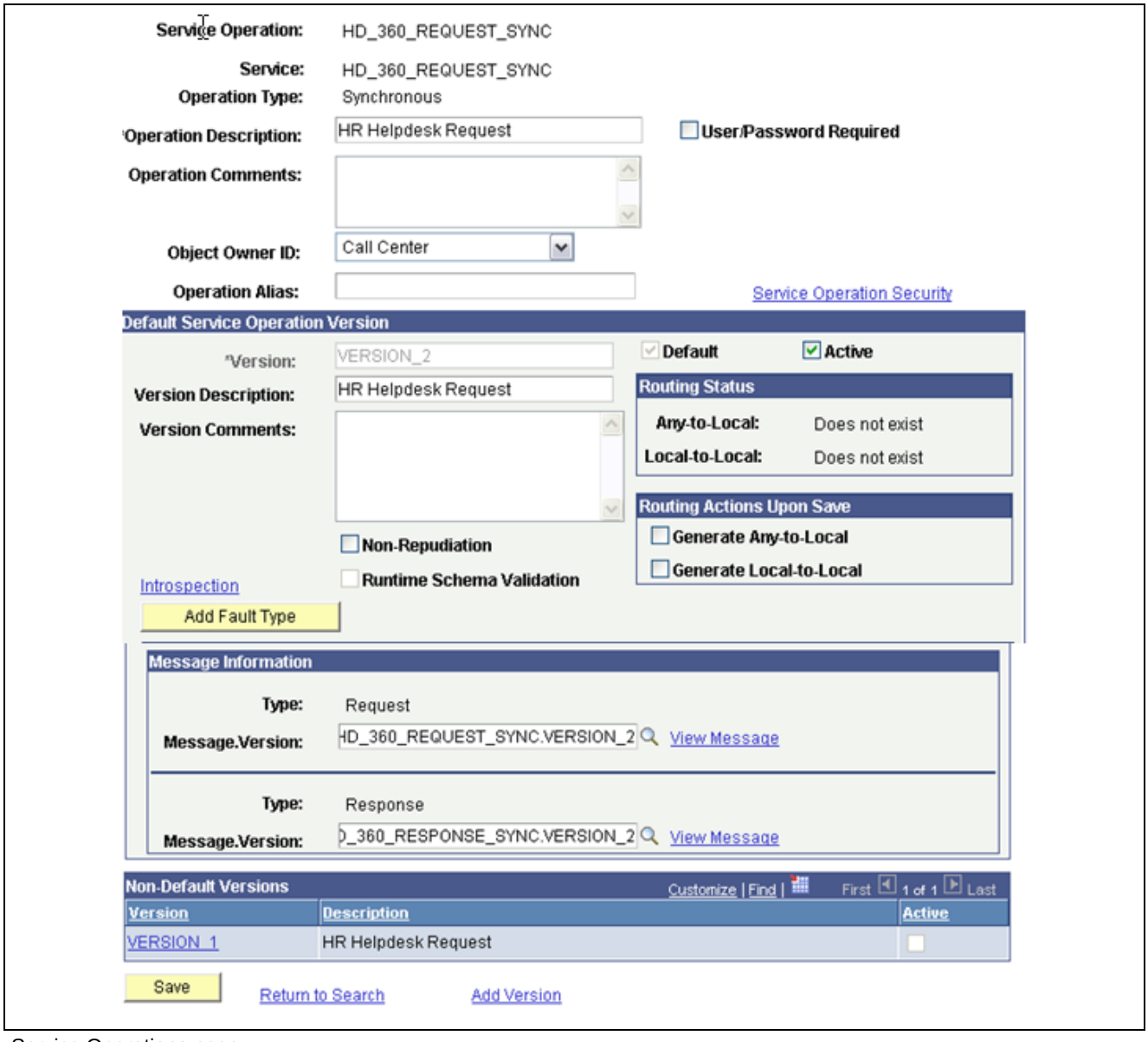
Task 7-1-5: Accessing HD_360_REQUEST_SYNC Service Operation

To access the HD_360_REQUEST_SYNC Service Operation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation, and then search for service operation HD_360_REQUEST_SYNC.
2. Select Service Operation to access the General Service Operation Page, as shown in the following example:



Service Operations page

3. In the Default Service Operation Version section, select the Active check box.
4. Click Save.
5. From here you can select the Handlers tab to access the Handlers page, as shown in the following example:

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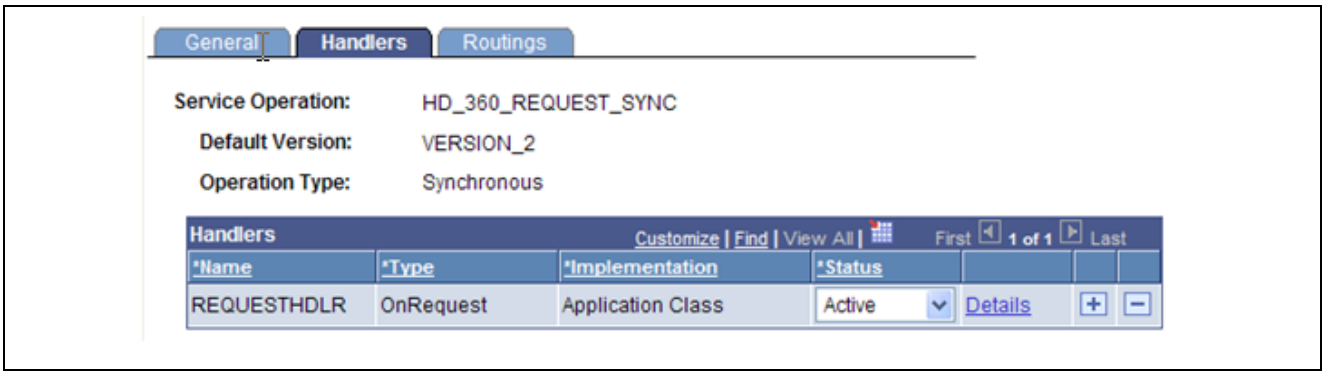

Handlers page

6. In the Status column for the REQUESTHDLR row, select *Active* from the drop-down list.
7. Click Save.

Task 7-1-6: Adding a PeopleSoft CRM Active Routing for Version 2

To add an active routing for version 2 for the PeopleSoft CRM database:

1. Select Home, PeopleTools, Integration Broker, Integration Setup, Routings.

   The Routing Definitions Search page appears.
2. Click the Add a New Value tab.
3. In the Routing Name field, enter *HD360_VERSION2*.
4. Click the Add button.

   The Routing Definitions page for HD360_VERSION2 appears, as shown in the following example:

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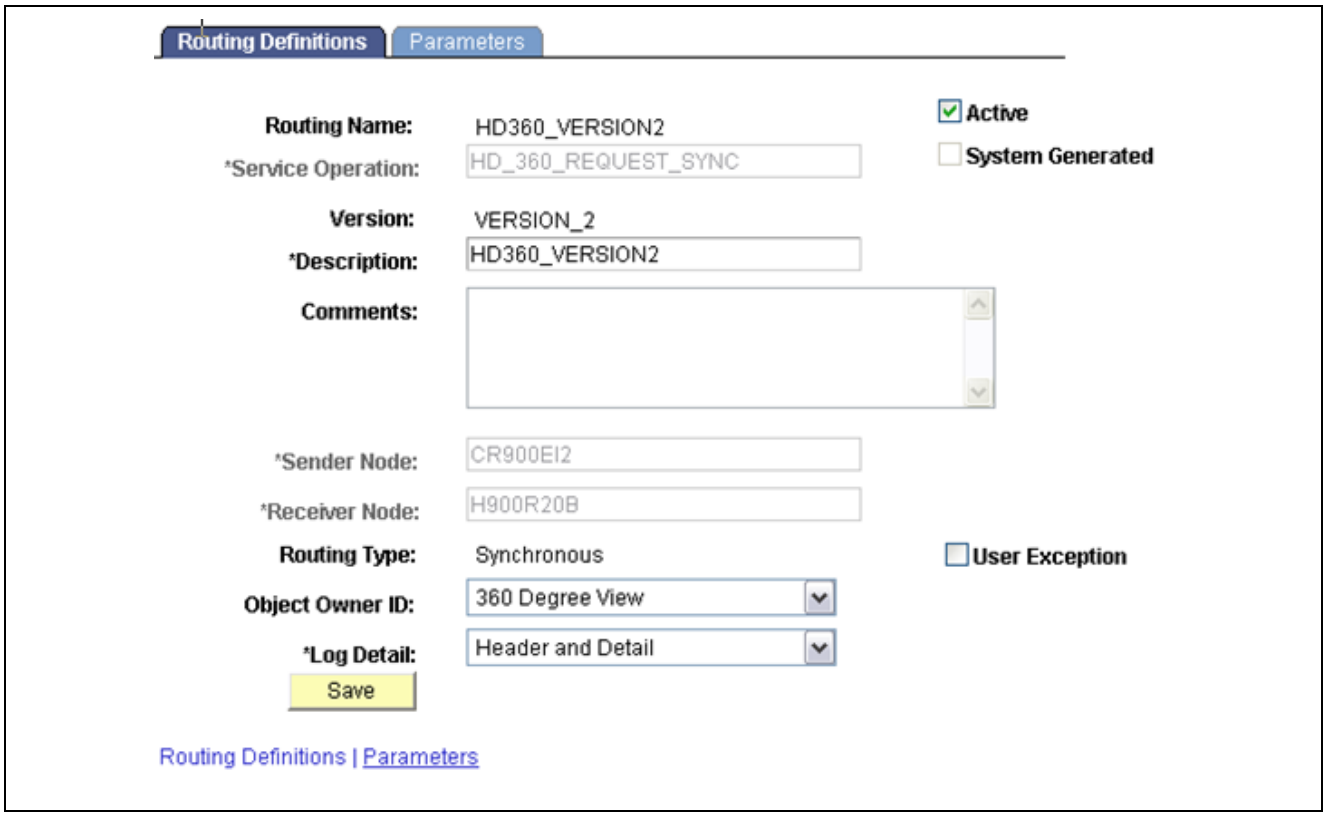

Routing Definitions page

5. Use this example to complete the Routing Definitions page:
   a. In the Description field, enter *HD360_VERSION2*.

   Note. The Sender Node populates as the CRM local node (CR900EI2), and the Receiver Node populates as the HCM local node (H900R20B).

   b. Verify that the User Exception check box is selected.
   c. In the Object Owner ID field, select *360 Degree View* from the drop-down list.
   d. In the Log Detail field, select *Header and Detail* from the drop-down list.
   e. Select the Active check box.
   f. Click Save.
6. Select the Parameters tab to access the Parameters page, as shown in the following example:

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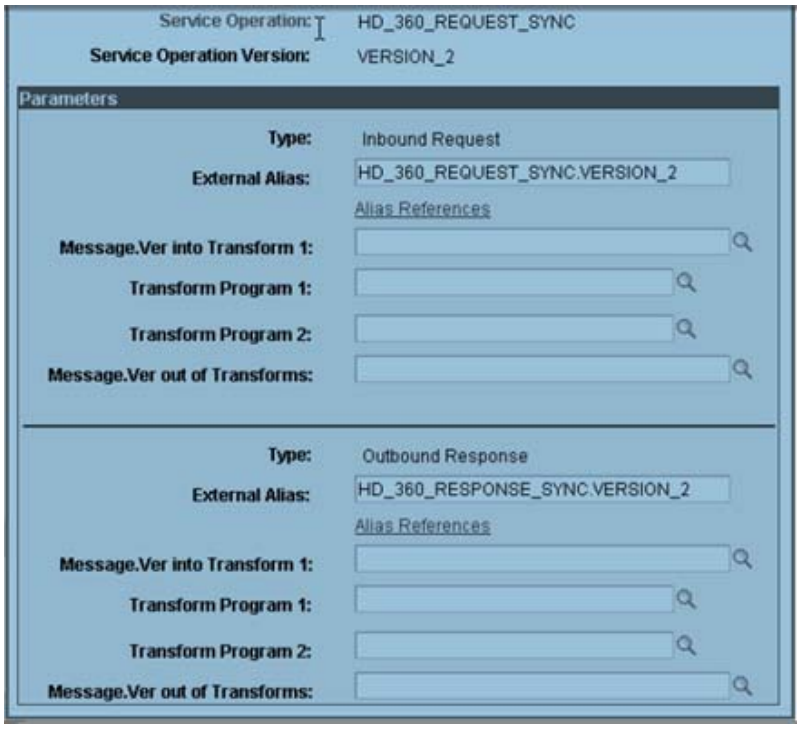

Node Definitions - Parameters page

7. Use this example to complete the Parameters page:
   a. For Inbound Request in the External Alias field, enter *HD_360_REQUEST_SYNC.VERSION_2*.
   b. For Outbound Response in the External Alias field, enter *HD_360_RESPONSE_SYNC.VERSION_2*.
   c. Click Save.

Note. There are no transformations because the PeopleSoft CRM database is sending Version 2 of the message and the PeopleSoft HCM database is expecting Version 2 of the message.

The Routings tab on the service operation should now show this new routing as *Active*, and any other routings should show as *Inactive.*The Routings tab will also show a User Exception check box. Ensure that you select this check box.

Task 7-1-7: Running Row Level Security in PeopleSoft HCM

To run the row level security process in the PeopleSoft HCM database:

1. Select Home, Setup HRMS, Security, Core Row Level Security, and then Refresh SJT_OPR_CLS.
2. Select any existing Run Control ID, or create a new one.
3. Select the Refresh All Routings check box and then run the process.
4. Ensure that the process runs and displays a message of *Success* in the process monitor.

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Task 7-2: Setting Up the PeopleSoft CRM 9.1 Database

This section discusses:

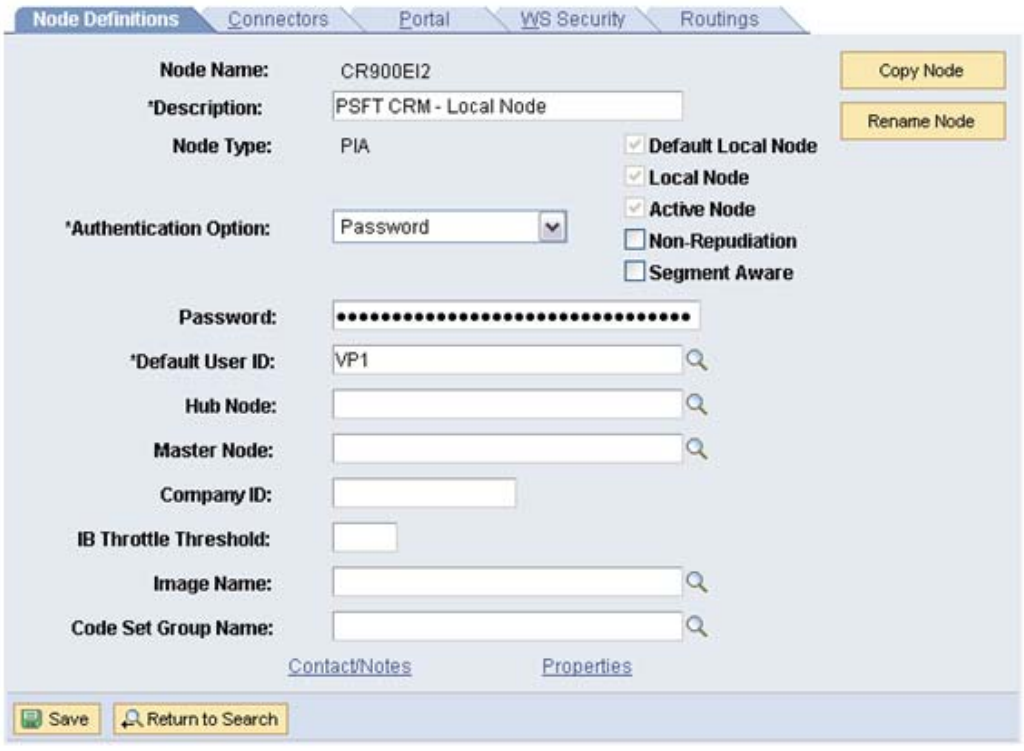
- Accessing the PeopleSoft CRM Local Node Definition
- Accessing the PeopleSoft HCM Local Node Definition
- Adding PeopleSoft HCM Trusted Node for PeopleSoft Single Signon
- Activating Service Operations
- Adding a PeopleSoft HCM Active Routing for Version 2

Task 7-2-1: Accessing the PeopleSoft CRM Local Node Definition

To access the PeopleSoft CRM local node definition:

Note. Implement all the steps to setup PeopleSoft CRM 9.1 database in the PeopleSoft CRM system.

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the CRM local node (for example, CR900EI2).
2. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:



Node Definitions page

3. Use this example to complete the Node Definitions page:

Note. The data you enter will differ and be specific to your system and set up.

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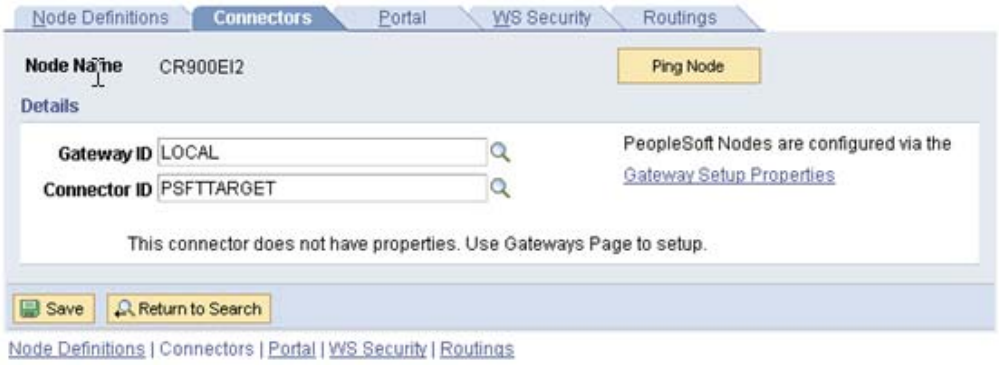
a. In the Authentication Option field, select *Password* from the drop-down list.

Note. Any nodes with an Authentication Option of Password must have the same password across PeopleSoft CRM and PeopleSoft HCM. The default password is *PSOFT.*

b. In the Password field, enter a password.

c. Click Save.

4. Select the Connectors tab to access the Connectors page, as shown in the following example:



Connectors page

5. In the Connector ID field, verify that *PSFTTARGET* is selected.
6. Click the Gateway Setup Properties link to access and set up the Gateway Properties as necessary.
7. Click Save.

Task 7-2-2: Accessing the PeopleSoft HCM Local Node Definition

To access the PeopleSoft HCM local node definition:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and then search for the HCM local node.
2. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example:

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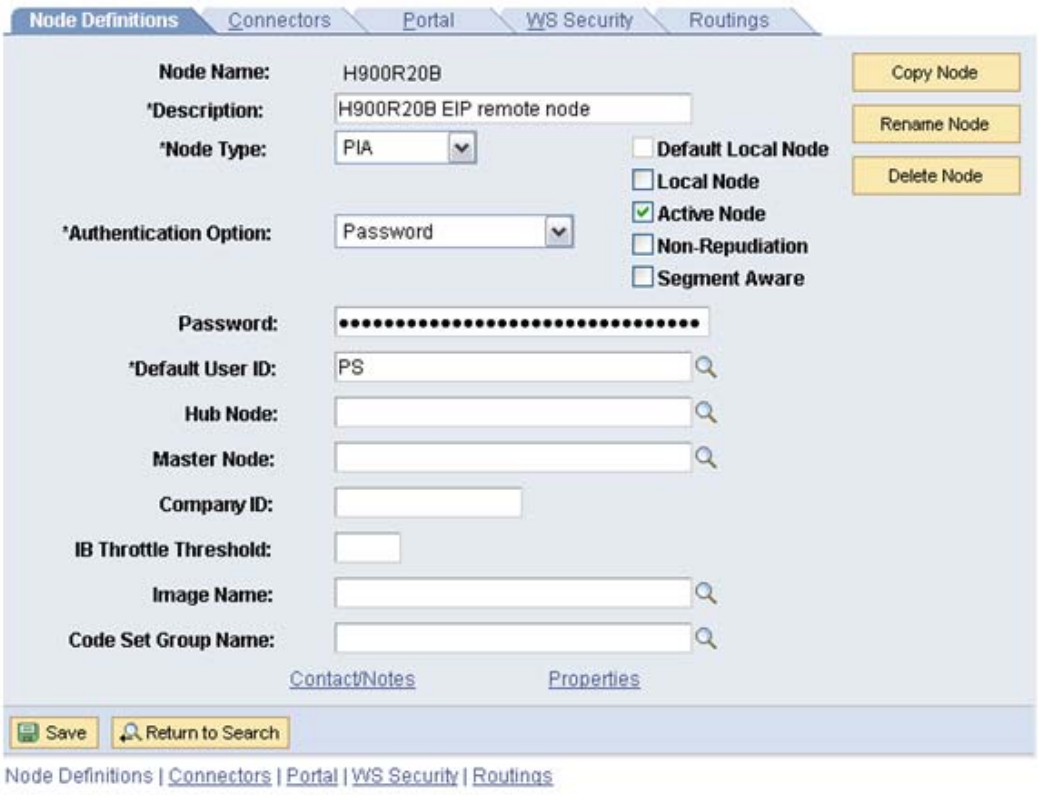

Node Definitions page

3. Use this example to complete the Node Definitions page:

Note. The data you enter will differ and be specific to your system and set up.

a. In the Authentication Option field, select *Password* from the drop-down list.

Note. Any nodes with an Authentication Option of Password must have the same password across PeopleSoft CRM and PeopleSoft HCM. The default password is *PSOFT.*

b. In the Password field, enter a password.

c. Click Save.

4. Select the Connectors tab to access the Connectors page, as shown in the following example:

Connectors page

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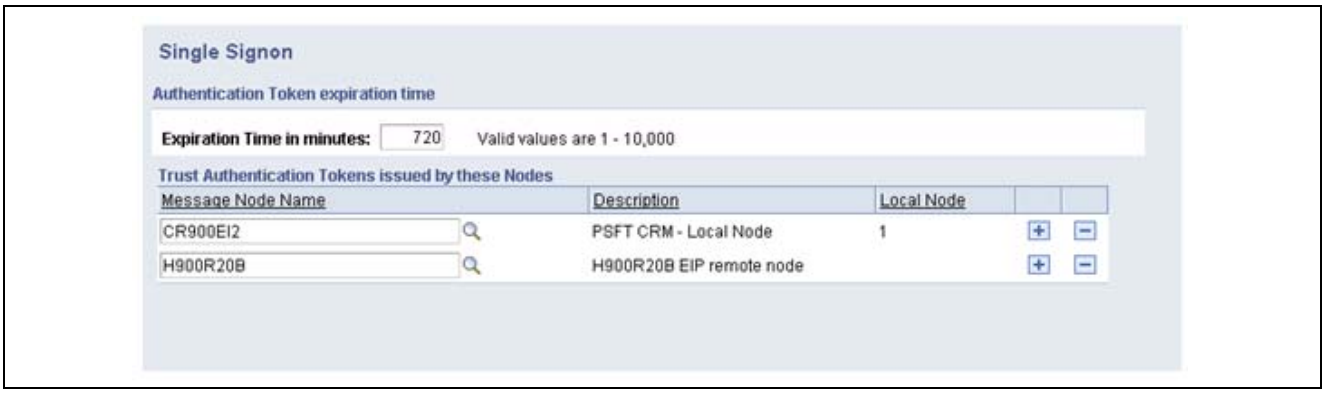
5. In the Connector ID field, verify that *PSFTTARGET* is selected.
6. Click the Gateway Setup Properties link to access and set up the Gateway Properties as necessary.
7. Click Save.

Task 7-2-3: Adding PeopleSoft HCM Trusted Node for PeopleSoft Single Signon

To add the PeopleSoft HCM trusted node to enable PeopleSoft Single Signon:

1. Select Home, PeopleTools, Security, Security Objects, Single Signon.

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



Single Signon page

2. Add a row for the PeopleSoft HCM local node.

   For example, *H900R20B.*
3. Click Save.

Task 7-2-4: Activating Service Operations

To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation, and then search for service operation HD_360_REQUEST_SYNC.
2. Select the General tab to access the General page, as shown in the following example:

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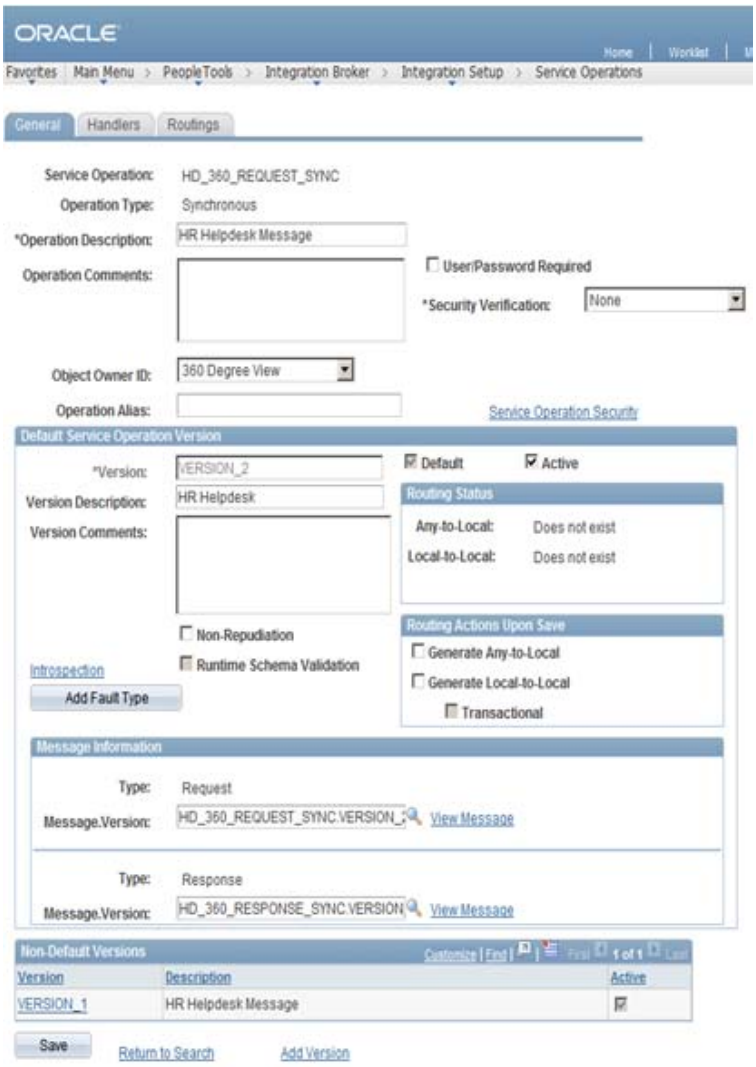

Service Operations - General page

3. In the Default Service Operation Version section, verify that the Active check box is selected.
4. Click Save.

Task 7-2-5: Adding a PeopleSoft HCM Active Routing for Version 2

To add an active routing for version 2 for the PeopleSoft HCM database:

1. Select Home, PeopleTools, Integration Broker, Integration Setup, Routings.

   The Routing Definitions Search page appears.
2. Click the Add a New Value tab.
3. In the Routing Name field, enter *HD360_VERSION2*.
4. Click the Add button.

   The Routing Definitions page for HD360_VERSION2 appears, as shown in the following example:

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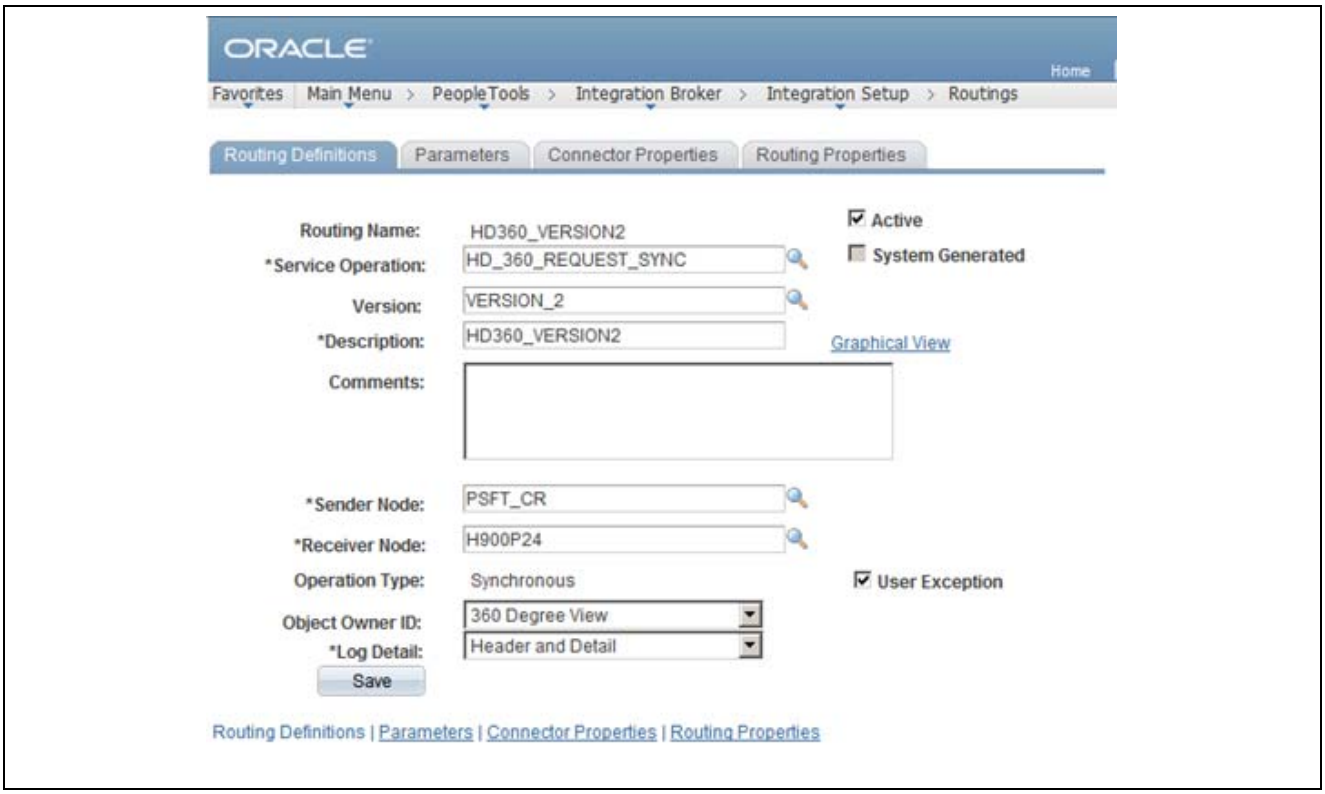

Routing Definitions page

5. Use this example to complete the Routing Definitions page:

   a. In the Routing Name field, enter *HD360_VERSION2*.

   Note. For new routings, you must enter or select the information for all fields, as in this example.

   For existing routings, the Sender Node populates as the CRM local node (CR900EI2), and the Receiver Node populates as the HCM local node (H900R20B).

   ---

   b. In the Service Operation field, enter or select the service operation. For example, HD360_REQUEST_SYNC.

      When you enter or select a service operation, the Version field automatically populates. For example, VERSION_2.

   c. In the Description field, enter a description. For example, HD360_VERSION2.

   d. In the Sender Node field, enter or select the sender node. For example, PSFT_CR.

   e. In the Receiver Node field, enter or select a receiver node. For example, H900P24.

   f. In the Routing Type field, enter or select a routing type. For example, Synchronous.

   g. When you enter or select a routing type, the User Exception check box appears. Verify that the User Exception check box is selected.

   h. In the Object Owner ID field, select *360 Degree View* from the drop-down list.

   i. In the Log Detail field, select *Header and Detail* from the drop-down list.

   j. Select the Active check box.

   k. Click Save.

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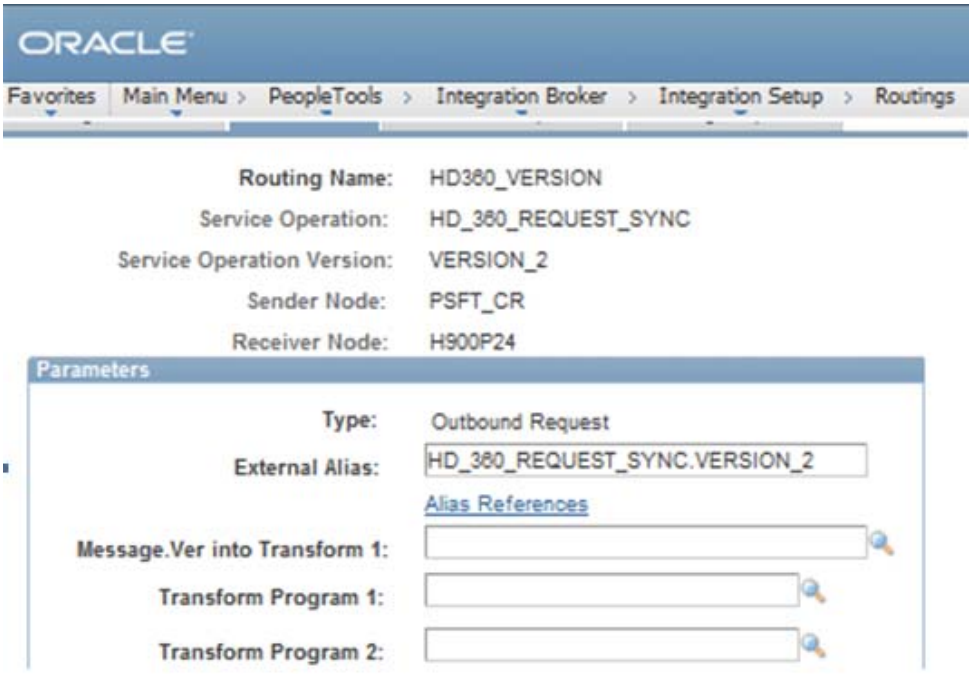
6. Select the Parameters tab to access the Parameters page, as shown in the following example:



Node Definitions - Parameters page

7. Use this example to complete the Parameters page:
   a. For Inbound Response in the External Alias field, enter *HD_360_REQUEST_SYNC.VERSION_2*
   b. For Outbound Request in the External Alias field, enter *HD_360_RESPONSE_SYNC.VERSION_2*
   c. Click Save.

Note. There are no transformations because the PeopleSoft CRM database is sending Version 2 of the message and the PeopleSoft HCM database is expecting Version 2 of the message.

The Routings tab on the service operation should now show this new routing as *Active*, and any other routings should show as *Inactive.*

This completes the PeopleSoft CRM 9.1 integration setup with PeopleSoft HCM 9 or 9.1.

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CHAPTER 8

Integrating PeopleSoft HRMS 8.9 with HRHD

This chapter discusses:

- Understanding Integrating PeopleSoft HRMS and HRHD
- Prerequisites
- Setting Up the URL Gateway for PeopleSoft CRM and HRMS
- Setting Up PeopleSoft CRM and HRMS Connector IDs
- Setting Up PeopleSoft Single Signon
- Pinging the PeopleSoft CRM and HRMS Nodes
- Activating the Message Channel or Queue
- Activating the HR_HELPDESK_360 EIP Messages
- Activating PeopleSoft HRMS 89 PSFT_CR Transactions
- Activating PeopleSoft CRM 9.1 and HRMS 8.9 Service Operations for PeopleSoft PeopleTools 8.48 and Above
- Setting Up Portal Content Links
- Activating Link Category for PeopleSoft HRMS 8.9

Understanding Integrating PeopleSoft HRMS and HRHD

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). The EIP enables access to the PeopleSoft HelpDesk for Human Resources (HRHD) Worker 360-Degree View from PeopleSoft CRM.

Note. Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft PeopleTools Installation guide for your database platform for both the PeopleSoft CRM and PeoplesSoft HCM applications.

Note. In addition, consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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Prerequisites

Before you can begin the PeopleSoft CRM and PeopleSoft HRMS integration tasks in this chapter, you must complete these requirements:

1. Install and configure a PeopleSoft CRM 9.1 database.
2. Install and configure a PeopleSoft HRMS 8.9 database.

Task 8-1: Setting Up the URL Gateway for PeopleSoft CRM and HRMS

This section discusses:

- Understanding the URL Gateway Setup for PeopleSoft CRM and HRMS
- Setting Up the PeopleSoft CRM Gateway
- Setting up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools Prior to 8.48
- Setting Up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools 8.48 and Above

Understanding the URL Gateway Setup for PeopleSoft CRM and HRMS

A URL gateway must be set up in the PeopleSoft CRM and PeopleSoft HRMS systems. In addition, PSFT_CR is delivered as a local node on PeopleSoft CRM, and PSFT_HR is delivered as a local node on PeopleSoft HRMS. The gateway URL defines these two nodes in a gateway property file. In PeopleSoft HRMS, you must create a gateway for the PeopleSoft CRM database.

Note. It is not mandatory that you use the delivered PSFT_CR and PSFT_HR nodes. You can define any local node as a URL gateway. If you use another node, instead of PSFT_CR and PSFT_HR nodes, substitute the nodes that you selected for PSFT_CR and PSFT_HR in the following directions.

See *PeopleSoft PeopleTools 8.52 PeopleBook: Integration Broker*, "Managing Integration Gateways."

Note. PeopleSoft CRM is on PeopleSoft PeopleTools release 8.52. PeopleSoft HCM was originally available on PeopleSoft PeopleTools release 8.46 (PeopleSoft HRMS 8.9). You may have applied a later PeopleSoft PeopleTools version on your HRMS system. Some of the instructions in this chapter only apply to certain PeopleSoft PeopleTools versions. Please review the instructions in each task carefully to verify whether they apply to your configuration.

Task 8-1-1: Setting Up the PeopleSoft CRM Gateway

For PeopleSoft CRM on PeopleSoft PeopleTools release 8.52, Oracle uses the Integration Broker to specify the gateway URL.

To set up the URL for the PeopleSoft CRM system:

1. In the PeopleSoft CRM system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.

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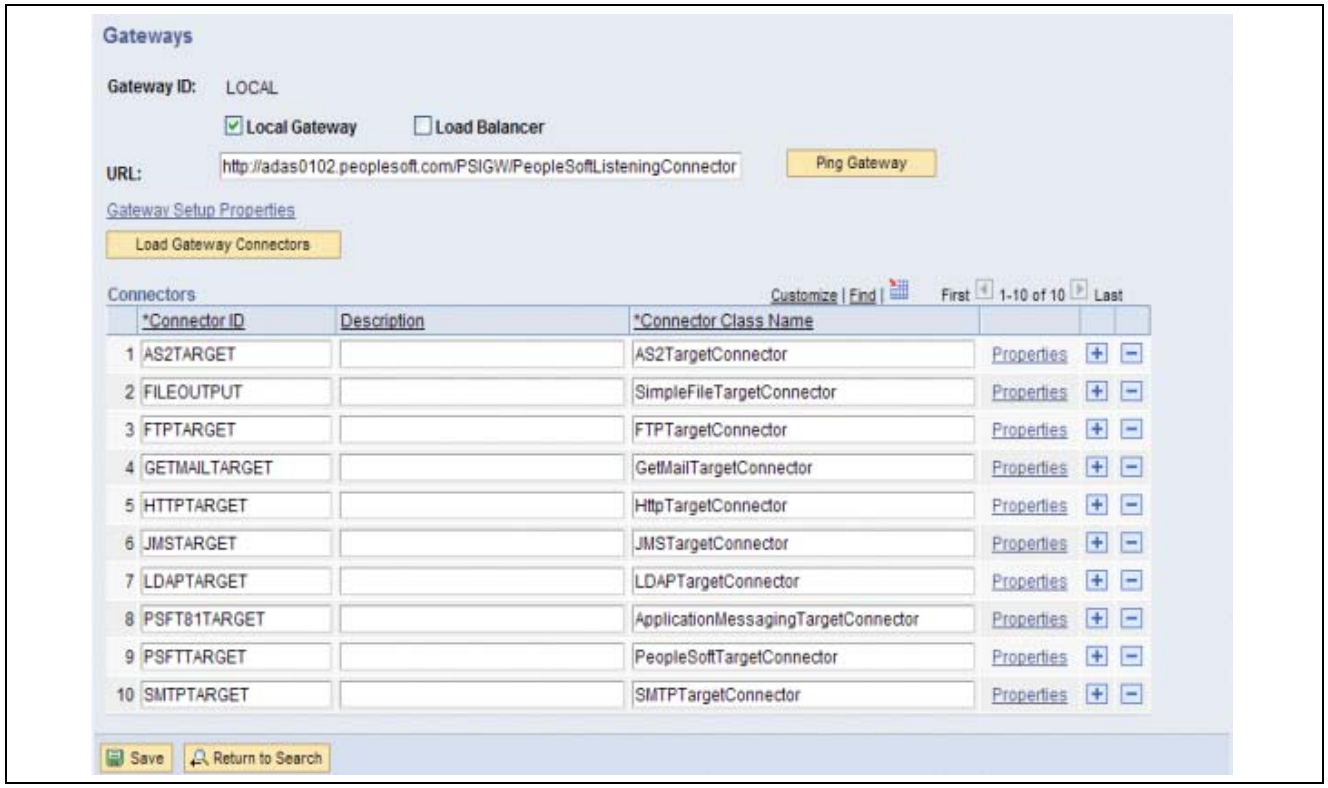
2. Search for and select *LOCAL* gateway.

   The Gateways page appears, as shown in the following example:



Gateways page

3. Enter the Gateway URL on the Gateways page:

   http://<*webserver_machine_name*>:<port>/PSIGW/PeopleSoftListeningConnector.

   The value that you enter for <webserver_machine_name><port> depends on the machine you set up to access the integration gateway. The <port> value should be an HTTP port.

4. Click Save, and then click OK for the No Connectors detected dialog box.
5. Click the Load Gateway Connector button.

   You will receive the message *Loading process was successful.*

6. Click OK.
7. Click Save.

   The information on the Gateways page should be similar to what is shown in the following example:

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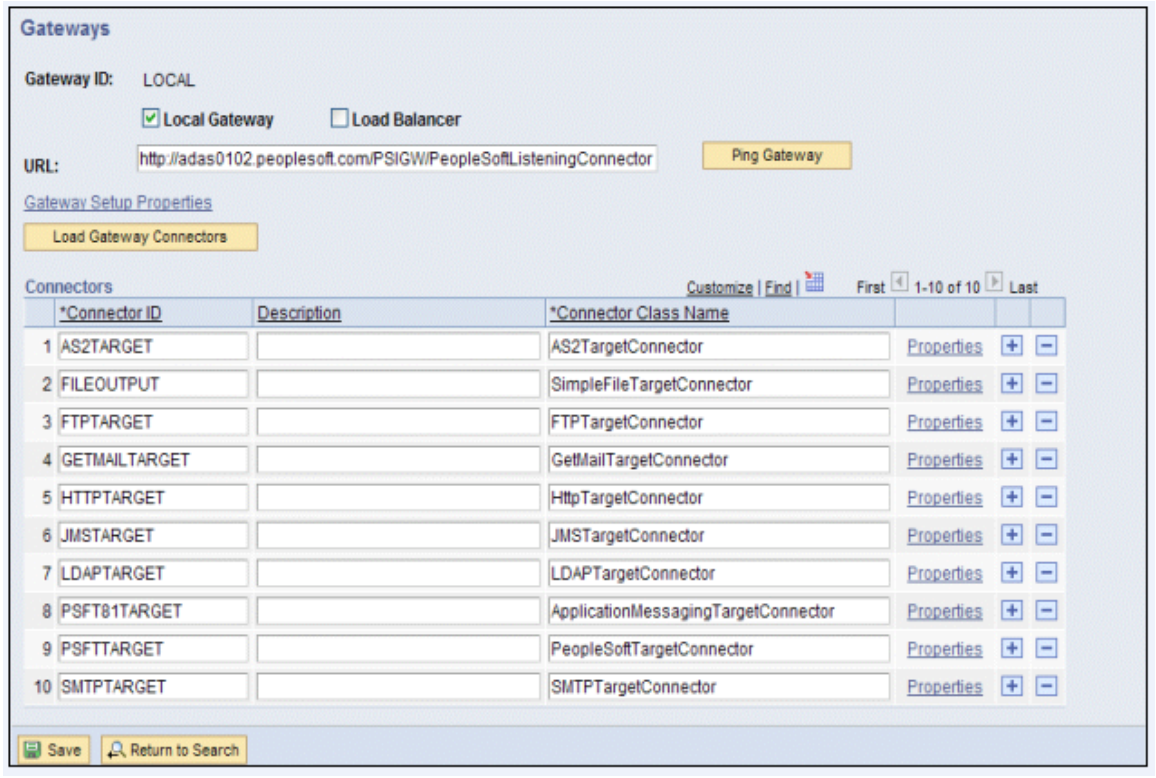
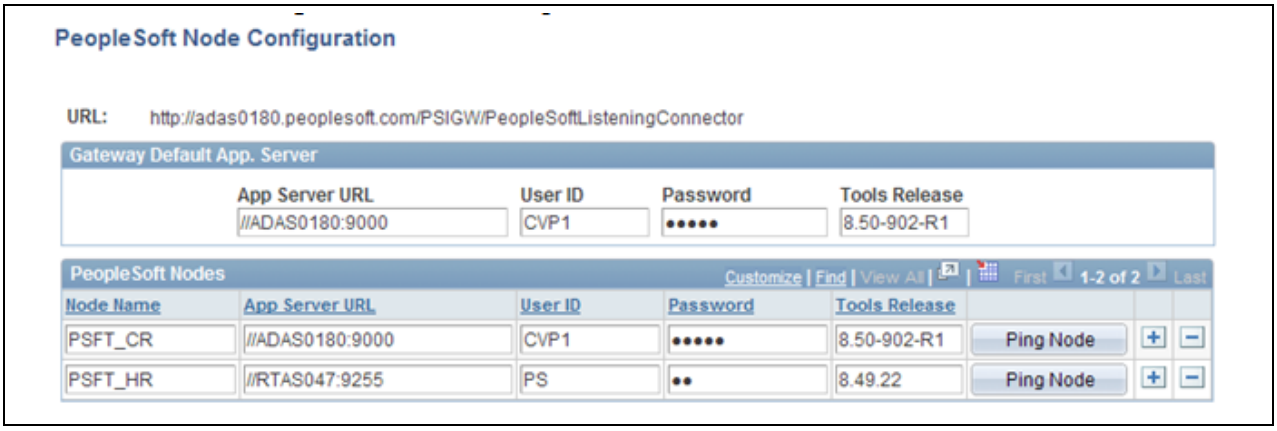


Example of Gateways page

8. After the gateway loads, do the following:

   a. Click the Gateway Setup Properties link to access the Gateway Property page, as shown in the following example:



PeopleSoft Node Configuration page

   b. Specify both the PeopleSoft CRM and the PeopleSoft HRMS node information, and then click Save.

      Ensure that the Gateway Default Application Server information is the same as the local node PSFT_CR.

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Task 8-1-2: Setting up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools Prior to 8.48

The following table provides the location of the gateway property file for various configurations. This is only applicable to PeopleSoft HRMS on PeopleSoft PeopleTools versions below 8.48. If your PeopleSoft HRMS system is running on PeopleSoft PeopleTools 8.48 or above, the property file modification is not required.

PeopleSoft Product Application	Application Server	Gateway URL Directory
HRMS 8.9 on PeopleTools releases prior to 8.47	Oracle WebLogic Server	C:\bea\wlserver61\config\PeopleSoft \Applications\PSIGW\Web-Inf \IntegrationGateway.Properties
HRMS 8.9 on PeopleTools 8.47	Oracle WebLogic Server	<%*PS_CFG_HOME*%> \webserv\peoplesoft\applications \peoplesoft\PSIGW\WEB-INF \IntegrationGateway.Properties
HRMS 8.9	IBM WebSphere	C:\WebSphere\AppServer \installedApps\peoplesoft \PSIGW\WEB-INF \IntegrationGateway.Properties

This is an example of a properties file with two nodes defined. You must modify the files on the PeopleSoft HRMS system to have two nodes defined with the following information:

```
#
# Replace $NODENAME with the exact name used for that Node.
# Replace information shown in <> with the correct information for your Node
(remove the <> as well)
#
# If a Non-Default Node is required the following settings should be uncommented.
#
ig.isc.PSFT_HR.serverURL=//adntas72:9350
ig.isc.PSFT_HR.userid=PS
ig.isc.PSFT_HR.password=8T+SA8zGqEM=
ig.isc.PSFT_HR.toolsRel=8.42-MC3

ig.isc.PSFT_CR.serverURL=//adntas41:8050
ig.isc.PSFT_CR.userid=VP1
ig.isc.PSFT_CR.password=JekncVtPdNg=
ig.isc.PSFT_CR.toolsRel=8.45
```

The passwords in the property file must be encrypted using PSCipher. To run on Microsoft Windows, ensure that Sun Java is in your system environment path.

Note. Run PSCipher.bat on each PeopleSoft PeopleTools installation location. For the IBM WebSphere web server *only*: Run the setupcmdline.bat before executing PSCipher.bat to ensure that Java is set properly. To identify the PeopleSoft PeopleTools release (toolsRel), see the PSSTATUS record.

- For PeopleSoft HRMS 8.9 on the Oracle WebLogic Server, the command is in the Oracle WebLogic home directory under config\peoplesoft.

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The command returns the encrypted password when you input an original password. Copy and paste the encrypted password into the gateways properties file. In this example, the encrypted password is shown in bold:

```
C:\bea\wlserver6.1\config\peoplesoft>PSCipher COMPACT
8T+SA8zGqEM=
```

- For PeopleSoft HRMS 8.9 with IBM WebSphere, the location of the command is:

  C:\websphere\appserver\installedapps\peoplesoft\

Note. The PSCipher password-encryption utilities generates different passwords depending on the PeopleSoft PeopleTools release. PeopleSoft HRMS uses the one delivered by its PeopleSoft PeopleTools release. Ensure that you have the correct release.

Task 8-1-3: Setting Up PeopleSoft HRMS Gateway on PeopleSoft PeopleTools 8.48 and Above

For PeopleSoft HRMS on PeopleSoft PeopleTools 8.48 and above, instead of editing the integrationGateway.Properties file, Oracle uses the same gateway URL to set up the connection.

Note. For HRMS on PeopleSoft PeopleTools 8.48, the gateway of PeopleTools 8.48 cannot talk directly to the CRM gateway of PeopleTools 8.52. Instead of using the Local gateway, define a remote gateway, which is on PeopleTools 8.49 gateway and above, and use this remote gateway for the remote CRM node on the HRMS system.

To set up the gateway in the PeopleSoft HRMS system with PeopleSoft PeopleTools release 8.48 or above:

1. In the PeopleSoft HRMS system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.
2. Search for and select *LOCAL* gateway.

   The Gateways page appears, as shown in the following example:

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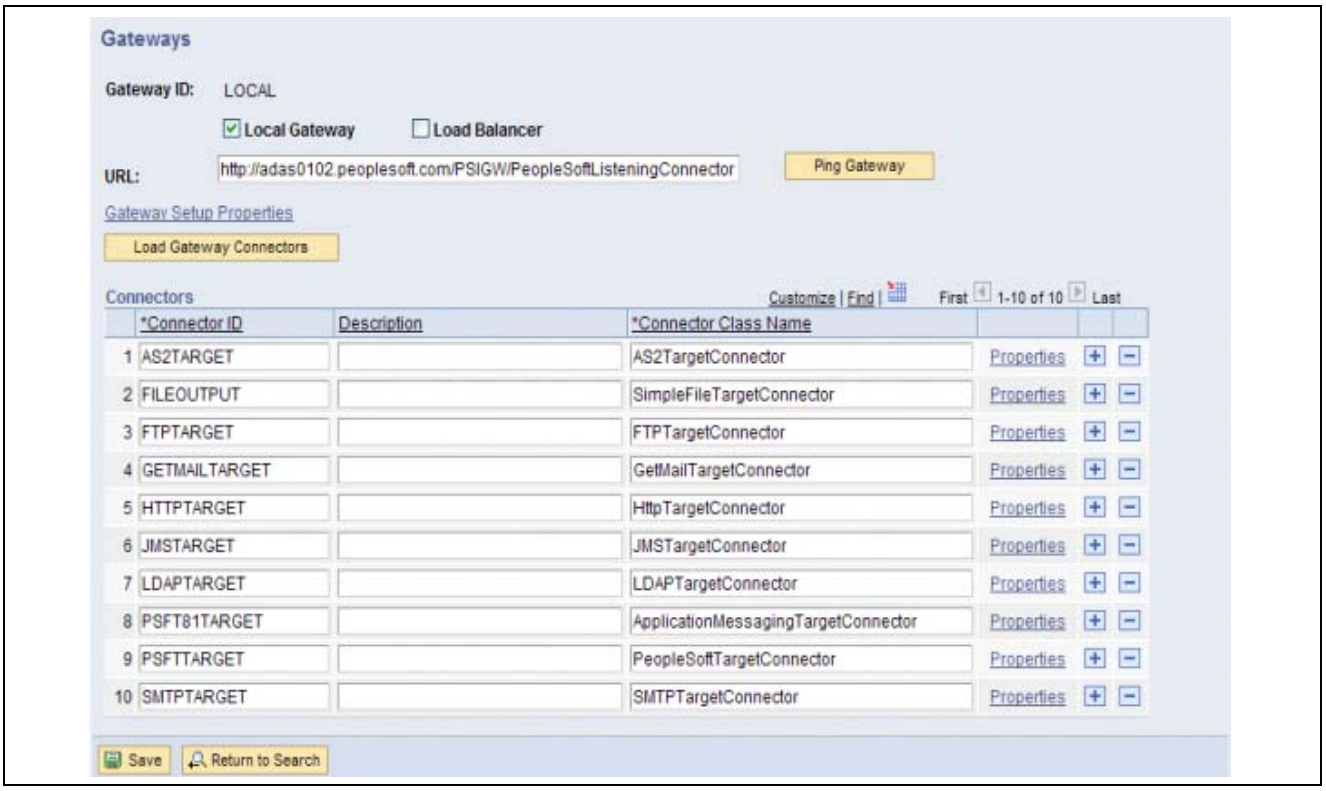

Gateways page

3. Enter the Gateway URL on the Gateways page:

   http://<*webserver_machine_name*><port>/PSIGW/PeopleSoftListeningConnector.

   The value that you enter for <webserver_machine_name><port> depends on the machine you set up. The <port> value should be an HTTP port.

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

   You will receive the message *Gateway refresh process was successful.*

6. Click OK.
7. Click Save.
8. After the gateway loads, do the following:
   a. Click the Gateway Setup Properties link to access the Gateway Property page.
   b. Specify both the PeopleSoft CRM and the PeopleSoft HRMS node information, and then click Save.

      Ensure that the Gateway Default Application Server information is the same as the local node PSFT_HR.

See Also

PeopleSoft PeopleTools 8.52 PeopleBook: Integration Broker, "Managing Integration Gateways"

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Task 8-2: Setting Up PeopleSoft CRM and HRMS Connector IDs

This section discusses:

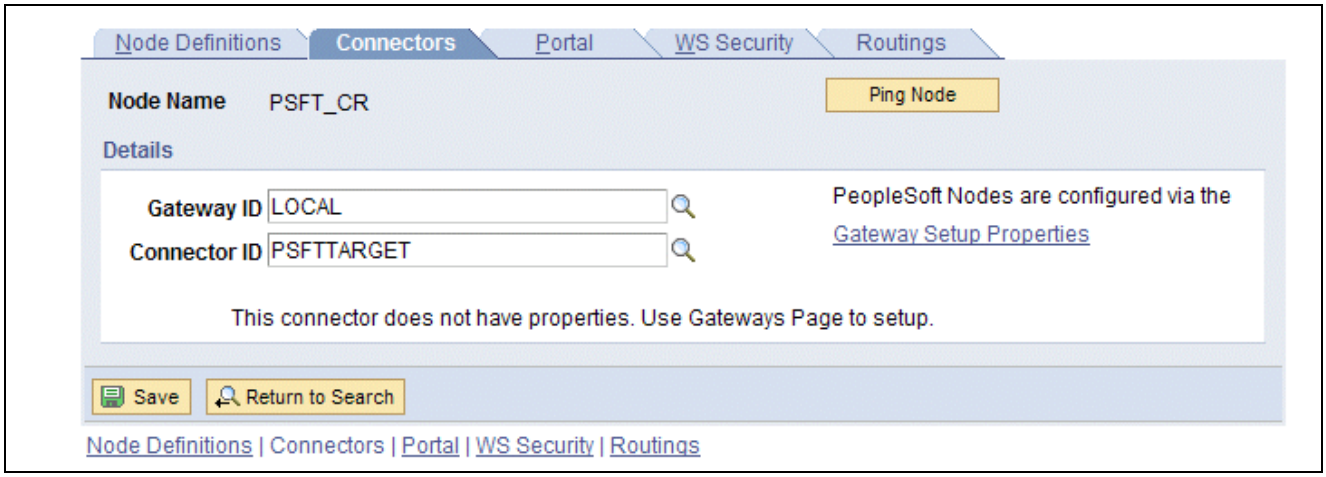
- Defining Connector ID for Nodes in the PeopleSoft CRM System
- Defining Connector ID for Nodes in the PeopleSoft HRMS System

Task 8-2-1: Defining Connector ID for Nodes in the PeopleSoft CRM System

You must set up a connector ID as PSFTTARGET for the PSFT_CR and PSFT_HR nodes in the PeopleSoft CRM system.

To define a PSFTTARGET connector ID for the PeopleSoft CRM nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes in the PeopleSoft CRM system.
2. Specify the PSFT_CR node (local node).
3. In the Node Definitions component, select the Connectors tab, as shown in the following example:



Node Definitions - Connectors page

4. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
5. Click Save.
6. Repeat the procedure for the PSFT_HR node (remote node), as shown in the following example:

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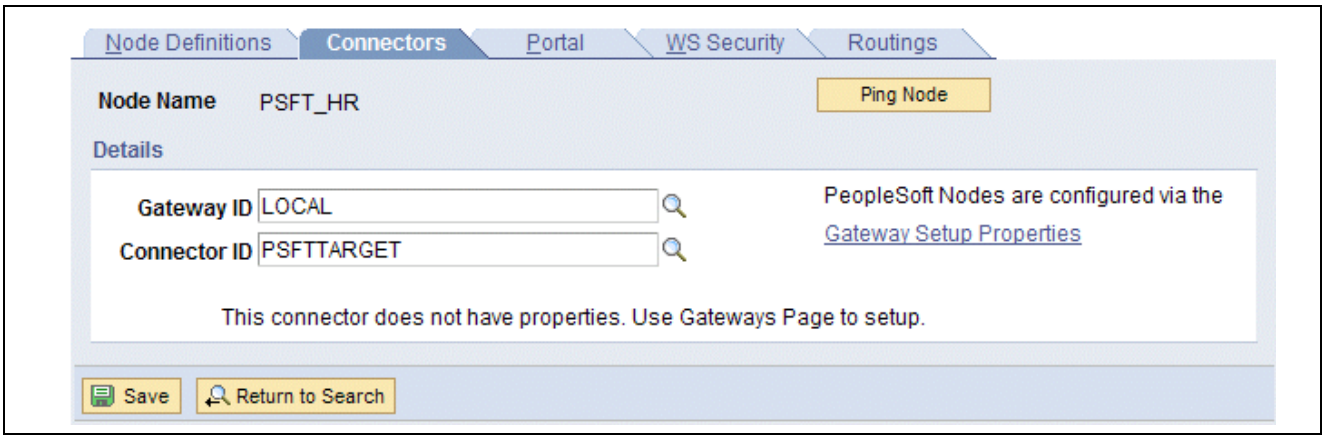


Node Definitions - Connectors page

Task 8-2-2: Defining Connector ID for Nodes in the PeopleSoft HRMS System

You must set up a connector ID as PSFTTARGET for the PSFT_CR and PSFT_HR nodes in the PeopleSoft HRMS system.

To define a PSFTTARGET connector ID for the PeopleSoft CRM nodes:

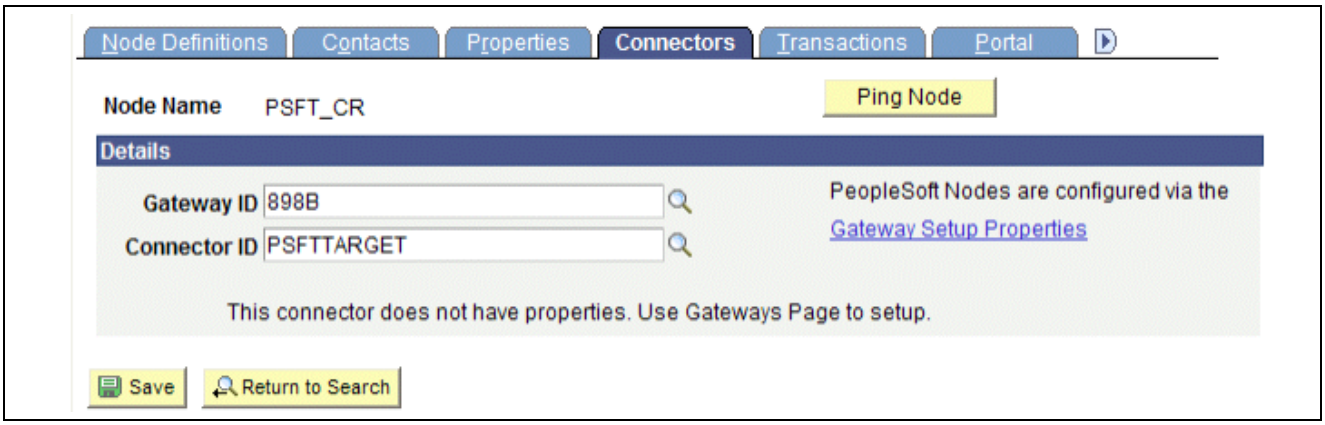
1. Verify that a gateway has been created for accessing the PeopleSoft CRM database.

   See Setting Up the URL Gateway for PeopleSoft CRM and PeopleSoft HRMS.
2. Select PeopleTools, Integration Broker, Integration Setup, Nodes in the PeopleSoft HRMS system.
3. Specify the PSFT_CR node (remote node).
4. In the Node Definitions component, select the Connectors tab.

Note. If the PeopleSoft HRMS system is on PeopleSoft PeopleTools 8.48, and a remote gateway is defined for integrating with CRM on PeopleSoft PeopleTools 8.52, then for the remote node PSFT_CR, use the remote gateway ID.

In theexample that follows, the Gateway has been defined as *898B*.

Otherwise, use the Local Gateway.



Node Definitions - Connectors page

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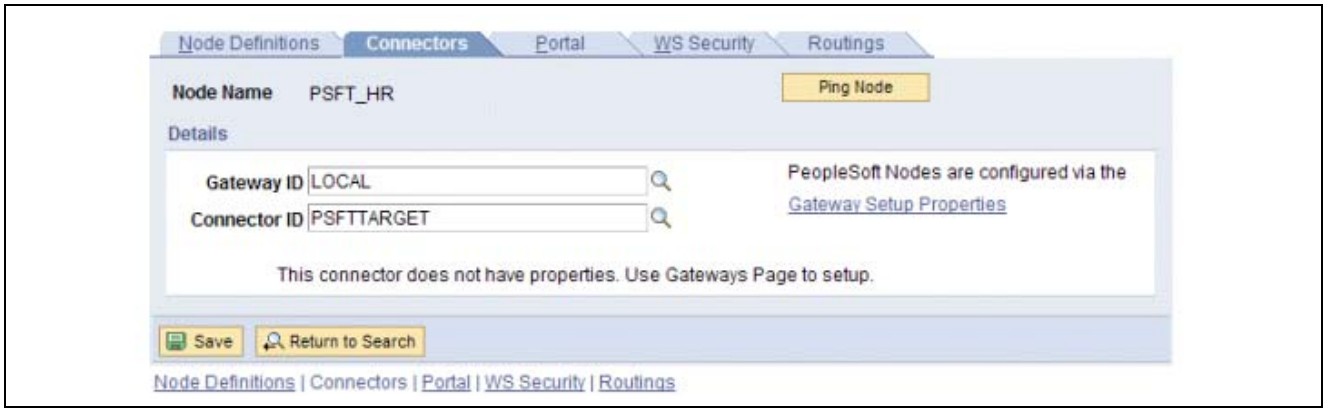
5. On the Connectors page, enter the PeopleSoft CRM gateway ID in the Gateway ID field .
6. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
7. Click Save.

To define a PSFTTARGET connector ID for the PeopleSoft HRMS nodes:

1. Verify that a gateway has been created for accessing the PeopleSoft HRMS database (local gateway).

   See “Setting Up the URL Gateway for PeopleSoft CRM and PeopleSoft HRMS.”
2. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in the PeopleSoft HRMS system.
3. Specify the PSFT_HR node (local node).
4. In the Node Definitions component, select the Connectors tab, as shown in the following example:



Node Definitions - Connectors page

5. On the Connectors page, enter *LOCAL* in the Gateway ID field.
6. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
7. Click Save.

Task 8-3: Setting Up PeopleSoft Single Signon

Set up your integration machines to support single signon, so that users do not need to sign on to PeopleSoft HRMS manually when they are transferring from PeopleSoft CRM to PeopleSoft HRMS. To do this, you must set a password authentication option for the PSFT_CR node and define the same password for the node in both systems.

To set up the authentication option for the PSFT_CR Node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes in both PeopleSoft CRM and PeopleSoft HRMS.
2. Search for and open the PSFT_CR node.
3. Select the Node Definitions tab.
4. Specify a password authentication option for PSFT_CR node as follows:

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a. On the Node Definitions page in the PeopleSoft CRM system, set the authentication option for the PSFT_CR node to *Password* and enter an appropriate password.

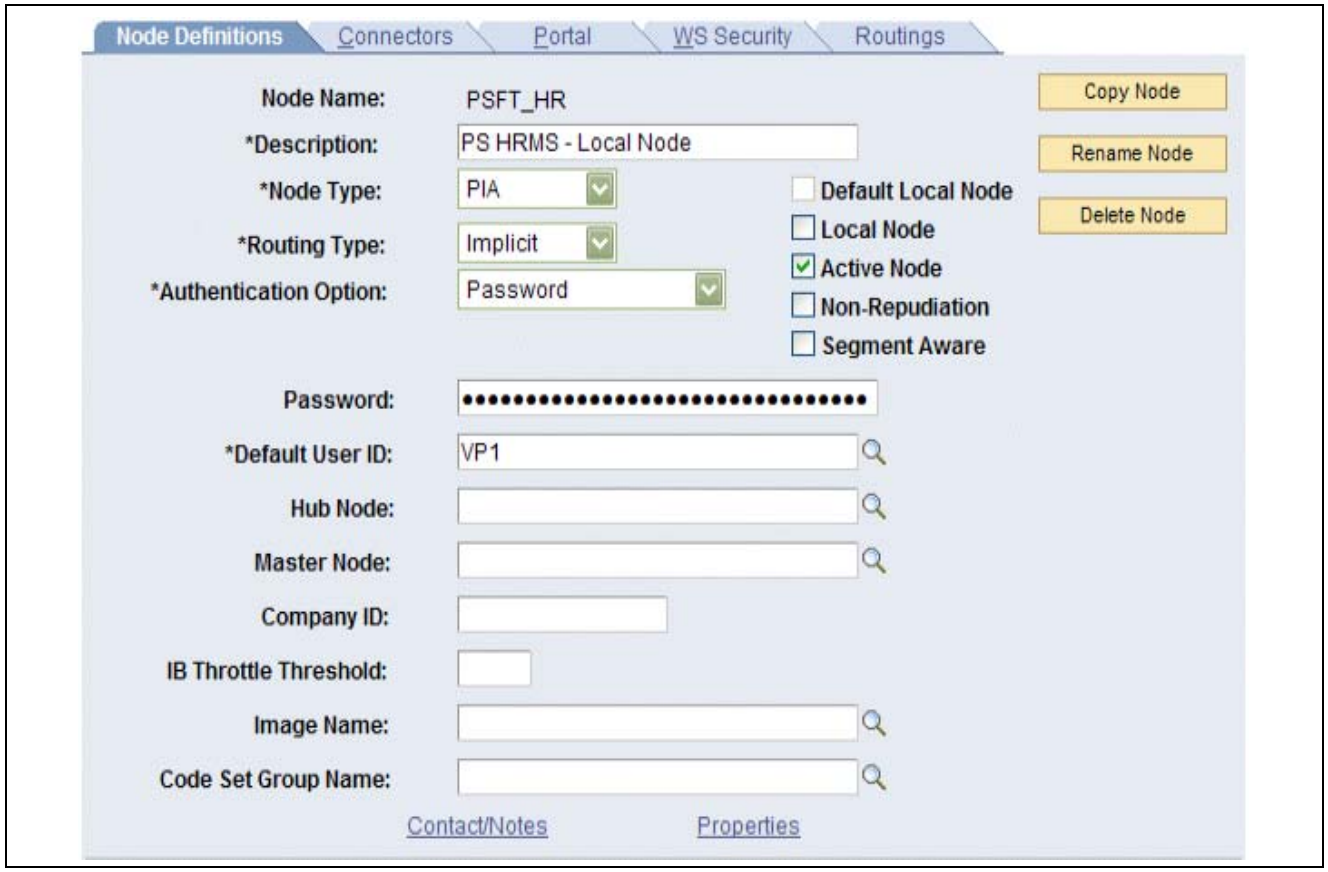
b. Press the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.

c. On the Node Definitions page in the PeopleSoft HRMS system, set the authentication option for the PSFT_CR node to *Password* and enter the same password that you entered in the PeopleSoft CRM system.

d. Press the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.

5. Click Save.

The following is an example of the Node Definitions page showing the specified values:



Node Definitions page

6. Identify the PSFT_CR node as a trusted node for single signon in the PeopleSoft HRMS system as follows:

a. Select PeopleTools, Security, Security Objects, Single Signon to access the Single Signon page in PeopleSoft HRMS.

b. On the Single Sign On page, add the node PSFT_CR to indicate that the node is trusted for single signon.

c. Click Save.

d. Do the same for the PSFT_HR node on the PeopleSoft CRM system, to indicate that the node is trusted for single signon, add the node PSFT_HR.

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7. Verify that both the PeopleSoft CRM and PeopleSoft HRMS web servers are using the proper AuthTokenDomain.

   When both PeopleSoft CRM and PeopleSoft HRMS are on PeopleSoft PeopleTools 8.48 or above, this step 7 is not required.

   To add an AuthTokenDomain to either the PeopleSoft CRM or PeopleSoft HRMS web server:

   a. Locate the configuration.properties file.

      If you did not select the default paths during installation, the file can be found here:

      \\<*Webserver*>\<*PIA instance*>\configuration.properties

      The following table provides the location of the Configuration.Properties files:

PeopleSoft Application	Web Server	Directory
HRMS on PeopleTools releases prior to 8.47	Oracle WebLogic Server, release up to 6.1	C:\bea\wlserver6.1\config \peoplesoft\applications\PORTAL \WEB-INF\psftdocs\ps
HRMS on Peopletools releases prior to 8.47	Oracle WebLogic Server, releases post 6.1	<%*PS_CFG_HOME*%>\webserv \peoplesoft\applications\peoplesoft \PORTAL\WEB-INF\psftdocs\ps
HRMS on PeopleTools 8.47 and later	Oracle WebLogic Server, release post 6.1	<%*PS_CFG_HOME*%>\webserv \peoplesoft\applications\peoplesoft \PORTAL\WEB-INF\psftdocs\ps
CRM	Oracle WebLogic Server, releases post 6.1	<%*PS_CFG_HOME*%>\webserv \peoplesoft\applications\peoplesoft \PORTAL\WEB-INF\psftdocs\ps
HRMS	IBM WebSphere	C:\WebSphere\AppServer \installedApps\peoplesoft\PORTAL \WEB-INF\psftdocs\ps
CRM	IBM WebSphere	<%*PS_CFG_HOME*%>\webserv \<cellname_nodename_servername> \<domain.ear>\PORTAL\WEB-INF \psftdocs\ps

      If you are using Oracle WebLogic or IBM WebSphere, verify that the configuration.properties and cookierules.xml files contain a valid AuthTokenDomain for both the PeopleSoft CRM and PeopleSoft HRMS web servers. You can find cookierules.xml files in the following location:

      <*PS_CFG_Home*>\webserv\<domain name>\applications\PeopleSoft\Portal\web-inf\psftdocs \<sitename>\webproof

   b. Add the following parameter:

      ```
      AuthTokenDomain = .<domain>.com
      ```

      For example:

      ```
      AuthTokenDomain = .peoplesoft.com
      ```

Note. Ensure that you include a space in front of the first period (that is, after the = and before the domain). The space is required.

---

8. For PeopleSoft PeopleTools release 8.48 and above, set up single signon in both the CRM and HRMS systems.

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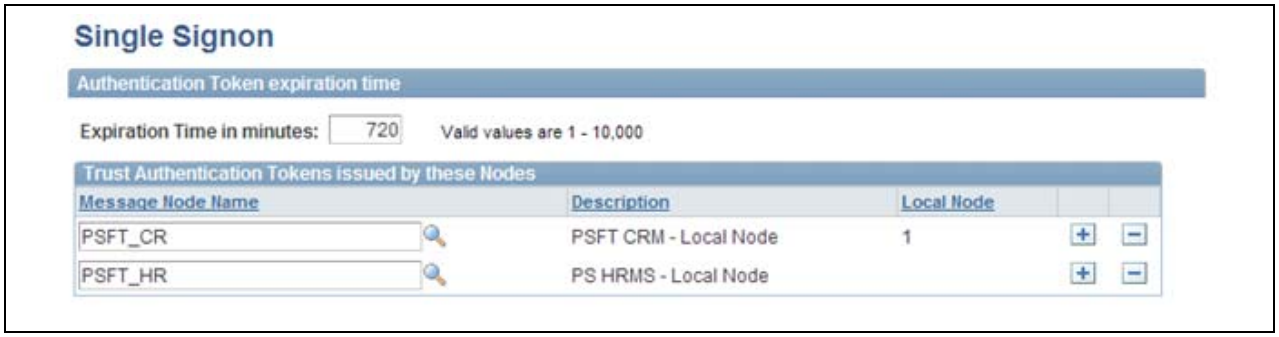
a. Select PeopleTools, Security, Security Objects, Single Signon.

b. Add both *PSFT_HR* and *PSFT_CR* as trusted nodes in the grid, as shown in the following example:.



Single Signon page

c. Perform this on both the CRM and HRMS systems.

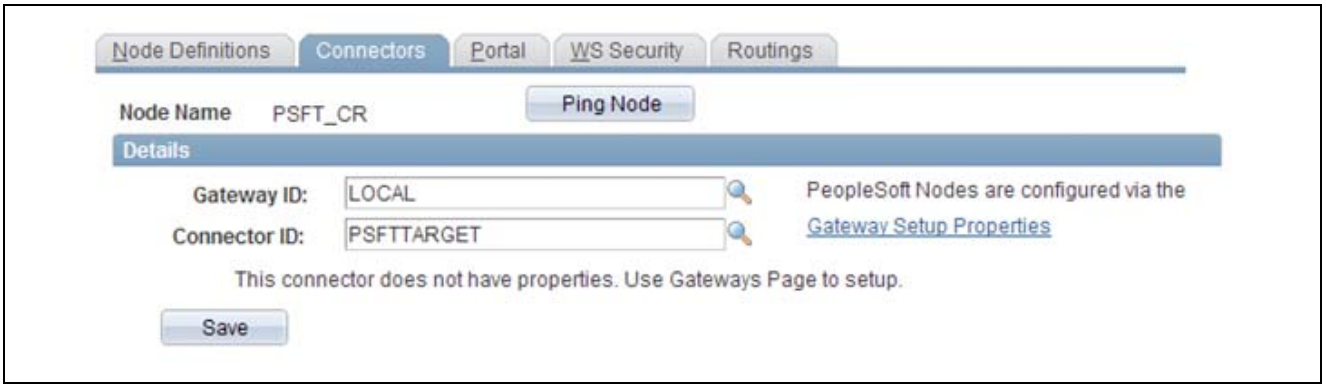
9. Reboot the PeopleSoft CRM and PeopleSoft HRMS web servers.

Task 8-4: Pinging the PeopleSoft CRM and HRMS Nodes

Ping the PSFT_HR and PSFT_CR nodes on both the PeopleSoft CRM and PeopleSoft HRMS systems to verify successful configuration.

To ping the PSFT_HR and PSFT_CR nodes:

1. Access the Node Status page in the Monitor Message component. If you are using PeopleSoft PeopleTools 8.52 and above, select PeopleTools, Integration Broker, Integration Setup, Nodes. If you are using a PeopleSoft PeopleTools release prior to 8.52, select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
2. For PeopleSoft PeopleTools prior to 8.52, select the Node Status tab. On the Node Status page, search and select the node name PSFT_HR or PSFT_CR.
3. For PeopleSoft PeopleTools 8.52 and above, search PSFT_HR or PSFT_CR from the Nodes search page. Click to access the Connectors tab, as shown in the following example:



Node Status page for PeopleSoft PeopleTools 8.48 and above

4. Click the Ping Node button.

   You see *Success* in the message text, as shown in the following example:

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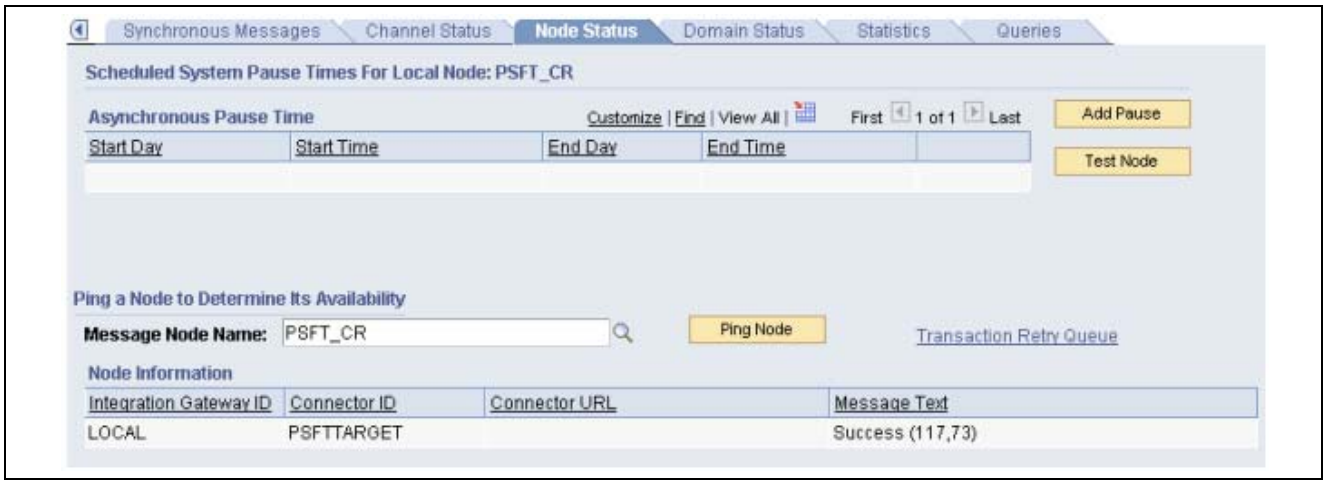

Node Status page for PeopleSoft PeopleTools prior to 8.48

If you do not see a successful message, you must refer to the *PeopleSoft PeopleTools 8.52 PeopleBook: Integration Broker* to debug.

Note. You must follow all of the preceding steps to get a successful ping.

Task 8-5: Activating the Message Channel or Queue

This section discusses:

- Confirming that Channel HD_360_SETUP is Running
- Confirming that Queue HD_360_SETUP is Running

Note. If your PeopleSoft CRM and PeopleSoft HRMS systems are both running on PeopleSoft PeopleTools 8.48 or above, these steps are not required. You can proceed to task "Activating PeopleSoft CRM 91 and HRMS 89 Service Operations for PeopleSoft PeopleTools 8.48 and Above."

Task 8-5-1: Confirming that Channel HD_360_SETUP is Running

To confirm that channel HD_360_SETUP is running in the PeopleSoft HRMS system:

1. Select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
2. Confirm that channel HD_360_SETUP on the Channel Status tab is up and running.
3. The Run/Pause button is a toggle button.

   If the status is Paused, click the Run button.

   The status changes to Running, and the button changes to Pause.

Task 8-5-2: Confirming that Queue HD_360_SETUP is Running

To confirm that queue HD_360_SETUP is running in the PeopleSoft CRM system:

1. In the PeopleSoft CRM system, select People Tools, Integration Broker, Integration Setup, Queues and search on Queue Name begins with HD_360_SETUP to access the Queue Definitions page.

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2. Confirm that Queue Status for HD_360_SETUP is set to *Run.* If the Queue Status is set to *Pause,*select *Run* from the Queue Status drop-down field.
3. Click Save.

Task 8-6: Activating the HR_HELPDESK_360 EIP Messages

Understanding Message Activation for HR_HELPDESK

The 360-Degree View EIP includes two application messages, Name HD_360_REQUEST_SYNC and HD_360_RESPONSE_SYNC. These messages are inactive when shipped. You must activate these messages in both the PeopleSoft CRM and PeopleSoft HRMS systems.

Note. This task is only applicable for PeopleSoft PeopleTools release prior to 8.48.

Task 8-6-1: Activating 360-Degree Messages in PeopleSoft HRMS

To activate the 360-Degree View EIP application messages in the PeopleSoft HRMS system:

1. Sign on to Application Designer.
2. Select File, Open, and then select *Message* from the Definition drop-down list box.

   This enables you to find application message definitions.

   To find the 360-Degree View EIP application message definitions, search for each of the following message names:

   HD_360_REQUEST_SYNC and HD_360_RESPONSE_SYNC

   For each message, open the message definition and perform the next two steps.
3. Right-click the message and select Message Properties.
4. On the Use tab of the Message Properties dialog box, select the Active Status check box, as shown in the following example:

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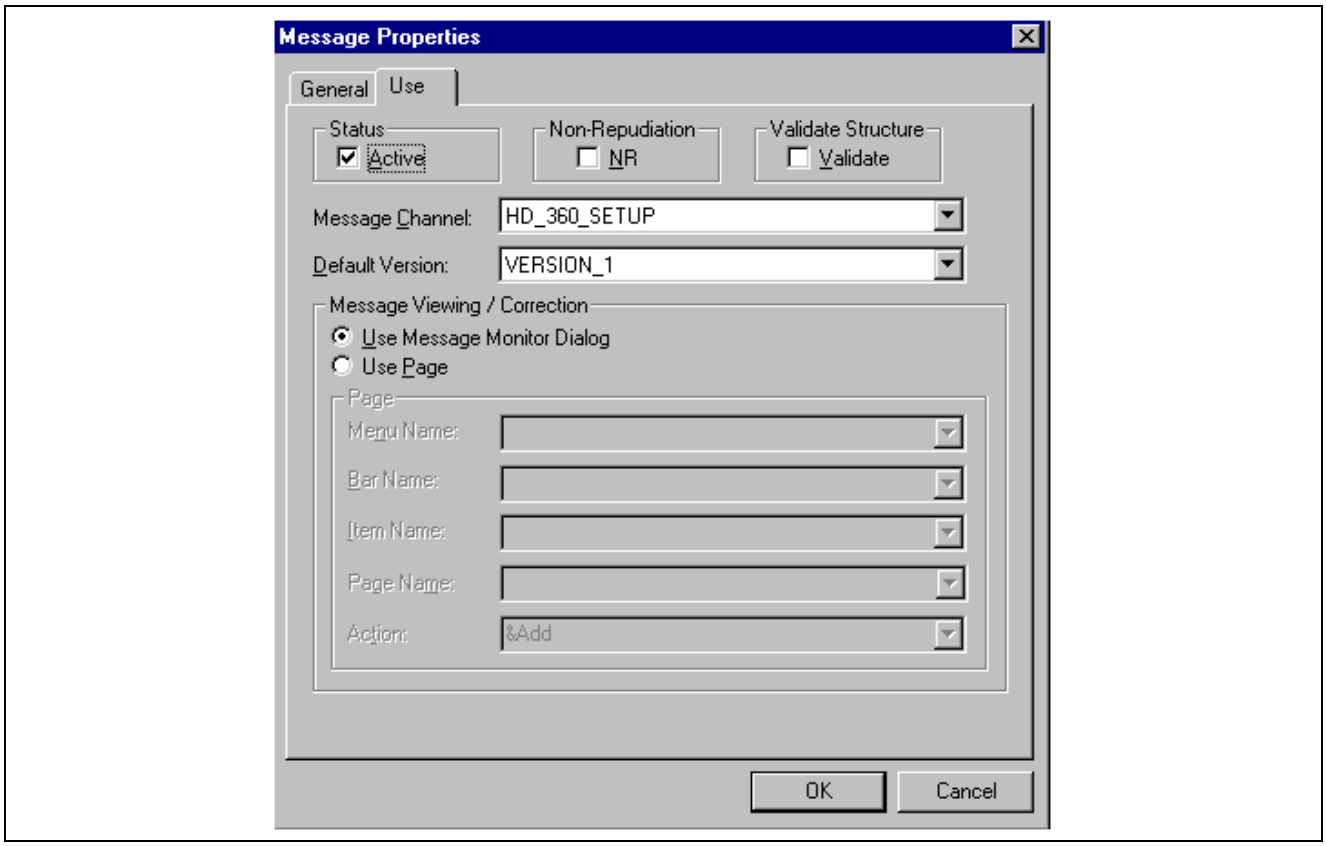

Message Properties dialog box

5. Click OK.
6. Save the message definition.

Task 8-7: Activating PeopleSoft HRMS 89 PSFT_CR Transactions

Transactions are defined in the remote node of each system. Follow the steps in this task to activate transactions for the PSFT_CR node in the PeopleSoft HRMS 8.9 system.

Note. This task is only applicable to PeopleSoft PeopleTools prior to 8.48.

To activate transactions for the PSFT_CR node in PeopleSoft HRMS:

1. Select PeopleTools, Integration Broker, Node Definitions and select the PSFT_CR node in PeopleSoft HRMS, as shown in the following example:

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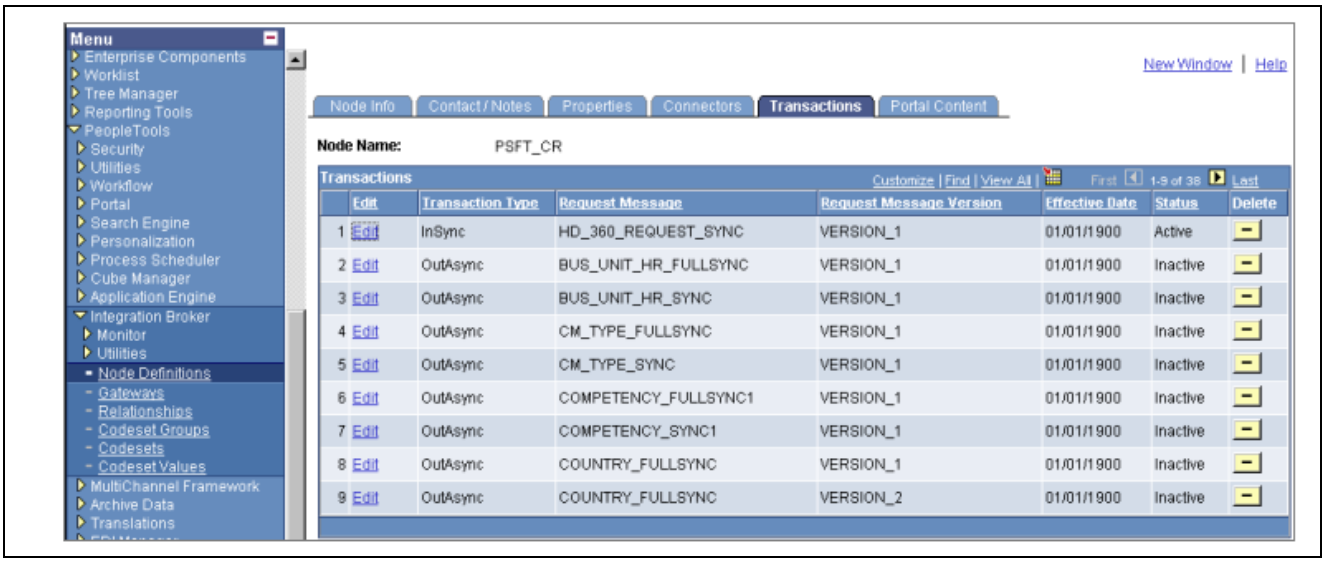
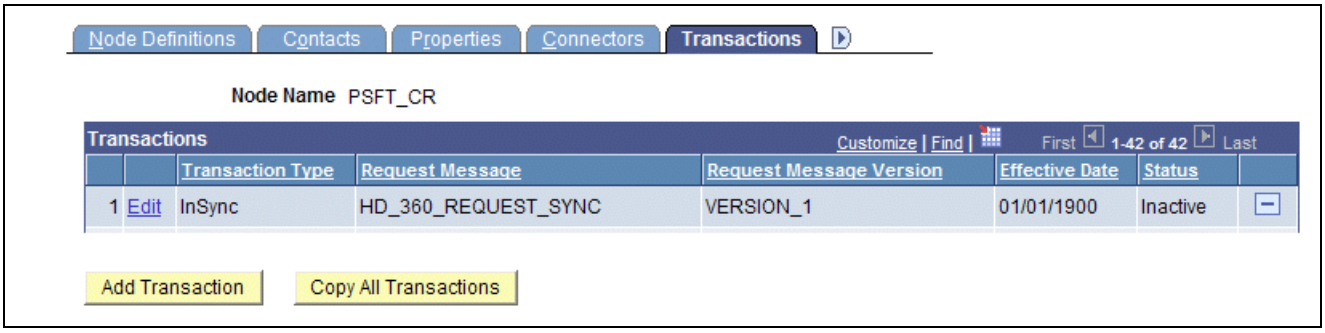


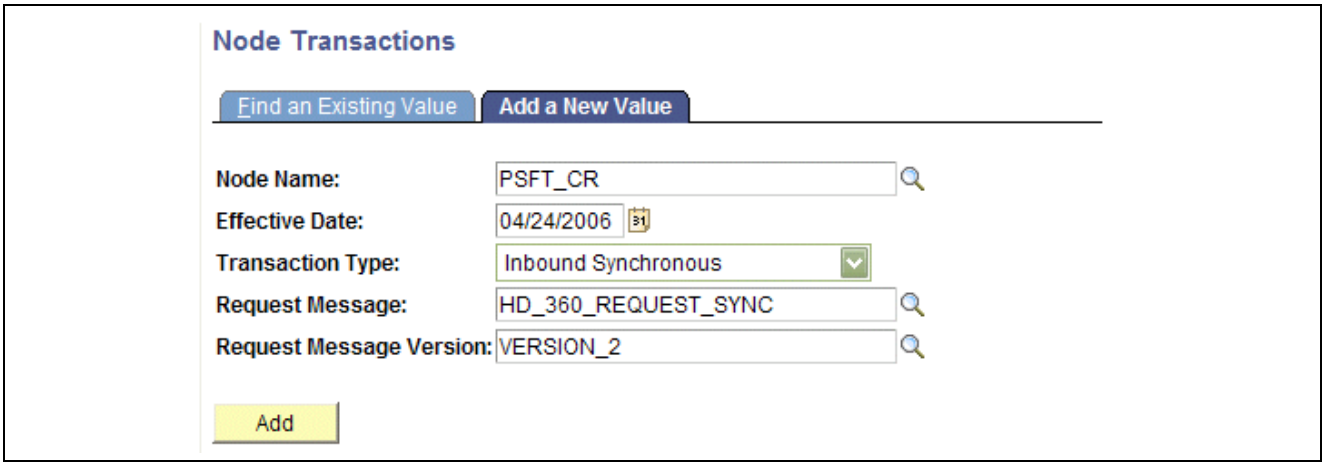
Node Definitions: Transactions page

2. Select the Transactions tab of the Node Definitions component and click the Add Transaction button, as shown in the following example:



Transactions page

On the Add a New Value tab of the Node Transactions page, enter the information shown in the following example:



Node Transactions page

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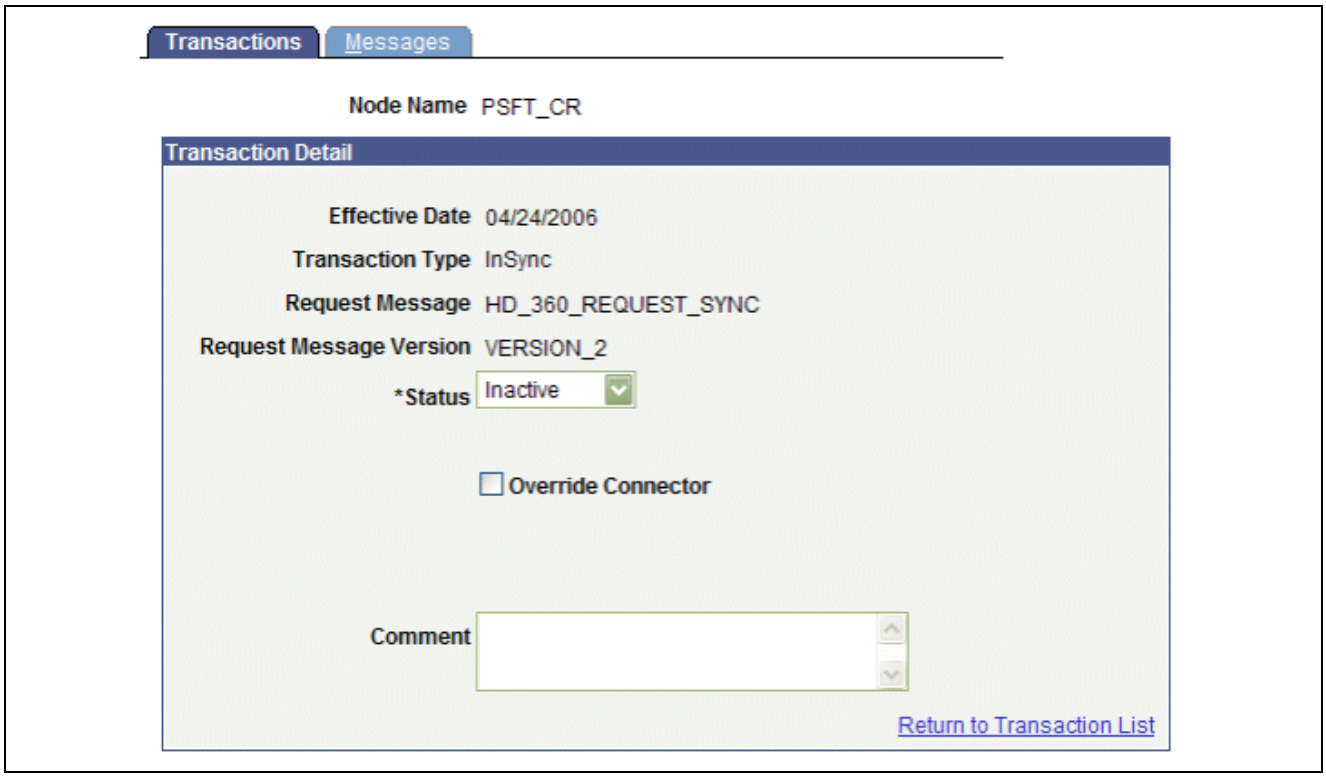
Note. The date in the Effective Date field represents the date from which the message is active; enter any date that meets your business needs.

3. Click the Add button to add VERSION_2 of the HD_360_REQUEST_SYNC message.
4. On the Transaction Detail page, change the status of the request message from *Inactive* to *Active.*

   The following example shows the Transaction Detail page prior the status change to *Active*:



Transactions - Transaction Detail page

5. On the Messages tab, under Response Message, set the Message Name to HD_360_RESPONSE_SYNC and the Message Version to VERSION_2, as shown in the following example:

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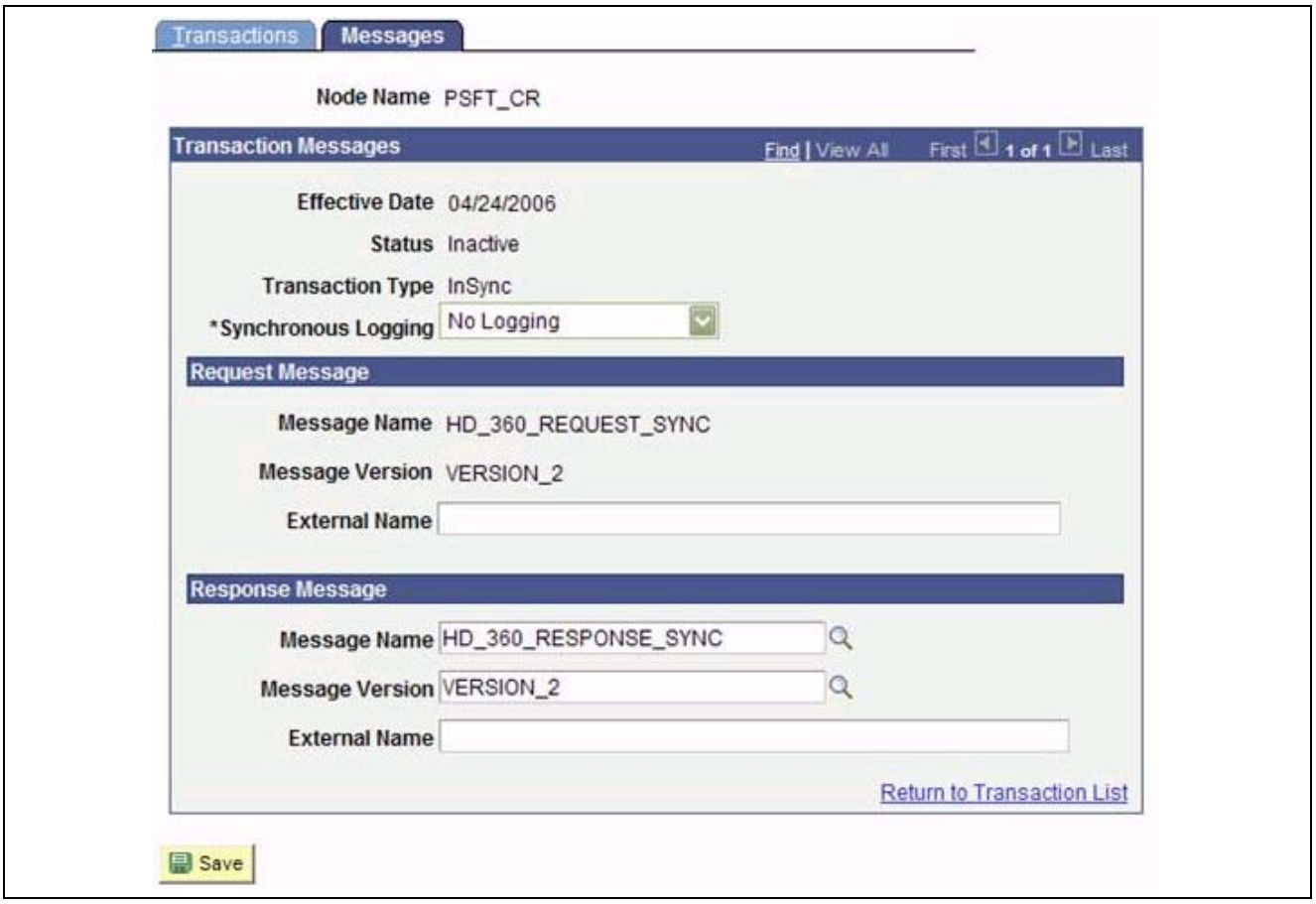

Messages page

6. Click Save and then click OK to accept the related warning message that you may receive.

Task 8-8: Activating PeopleSoft CRM 9.1 and HRMS 8.9 Service Operations for PeopleSoft PeopleTools 8.48 and Above

To activate the 360-Degree View service operations in both the PeopleSoft CRM and the HRMS 8.9 systems for PeopleSoft PeopleTools 8.48 and above:

Note. This task is applicable to PeopleSoft PeopleTools 8.48 and above.

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD_360_REQUEST_SYNC, as shown in the following example:

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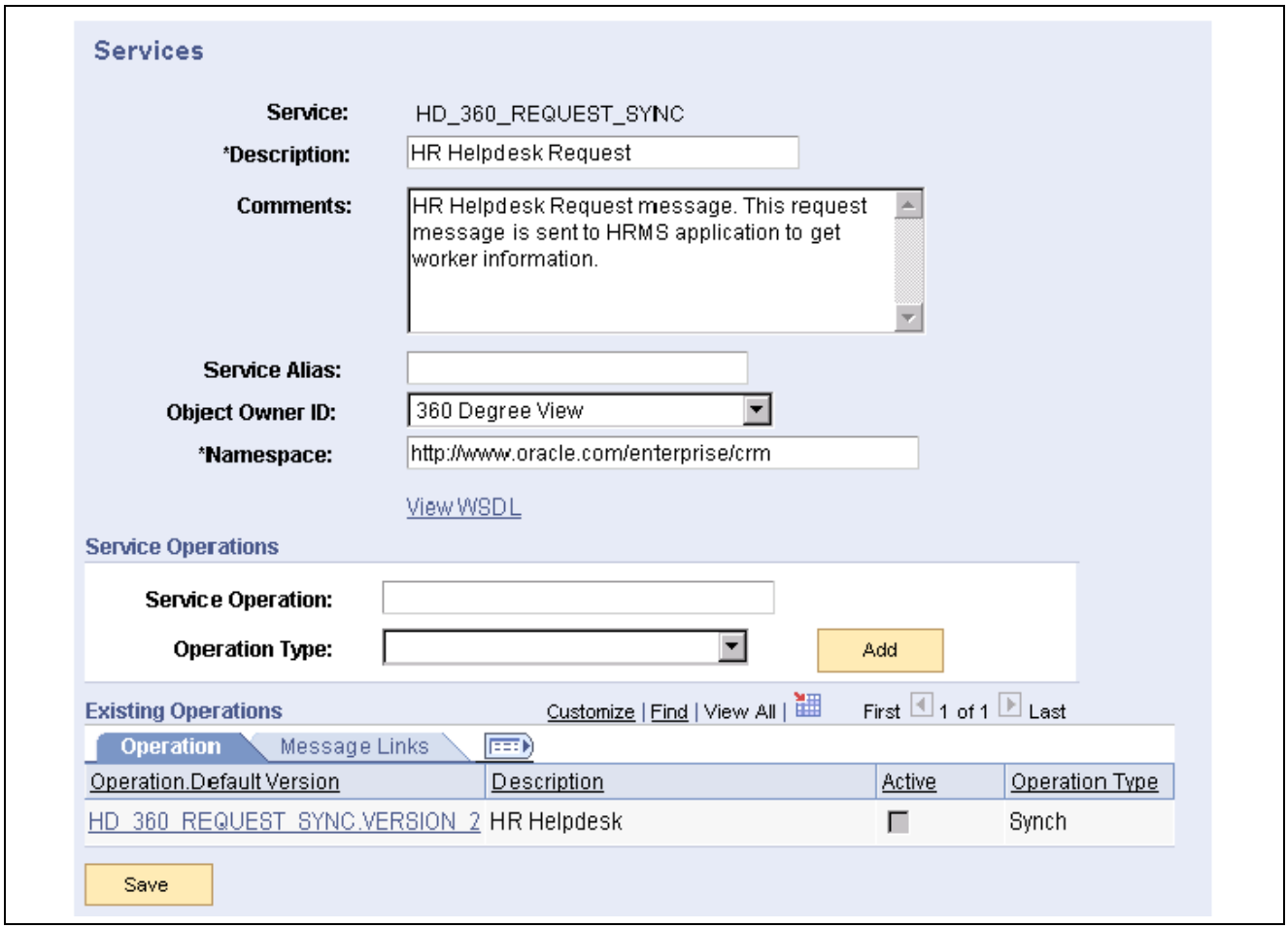

Services page

2. Select HD_360_REQUEST_SYNC.VERSION_2 from the Existing Operations section to open the Operations page.
3. To activate HD_360_REQUEST_SYNC.VERSION_2 , select the Active check box under Default Service Operation Version for VERSION_2 on the General tab and click Save, as shown in the following example:

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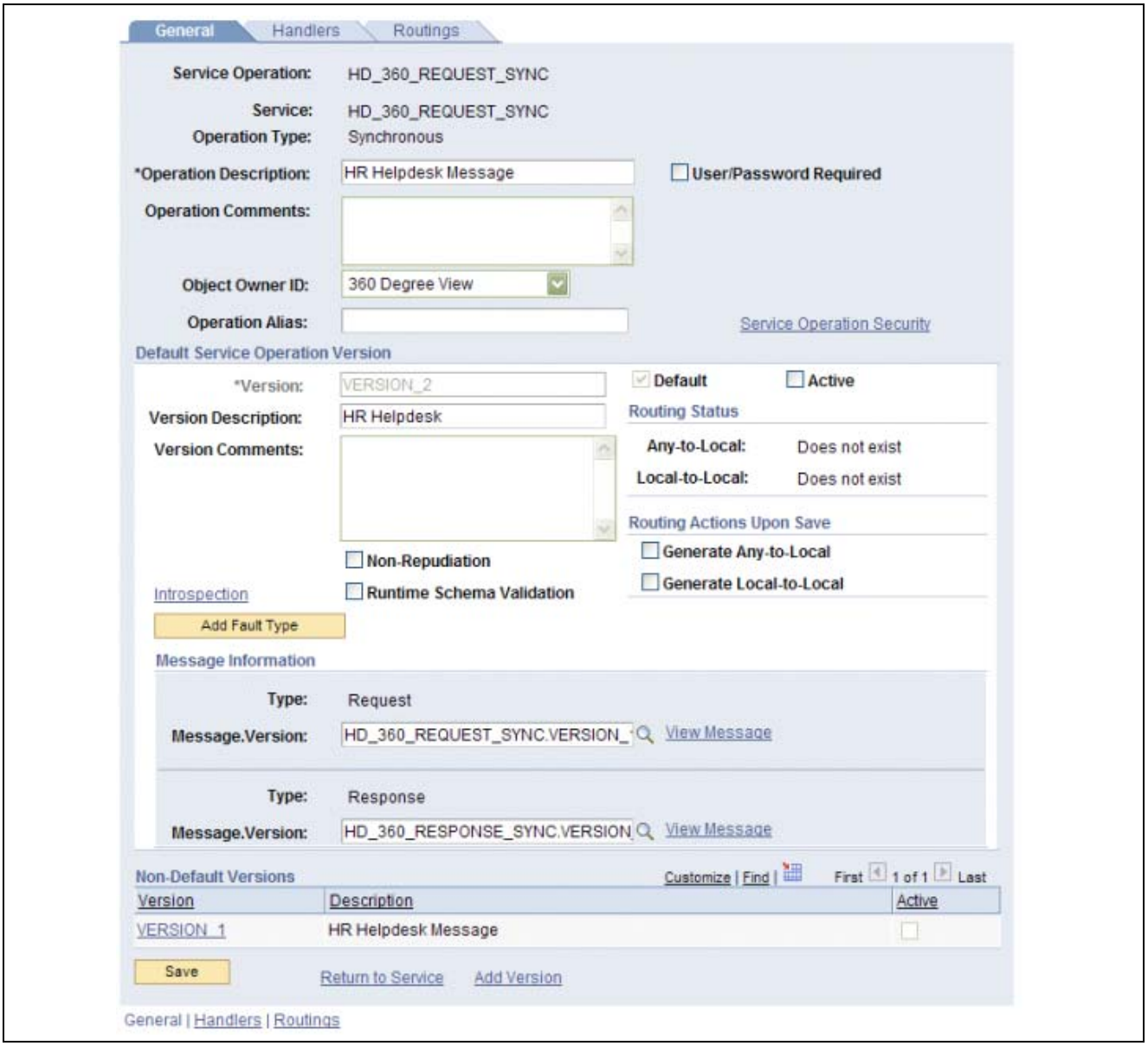

General page

4. To activate the routing for HD360_VERSION_2:
   a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD_360_REQUEST_SYNC.
   b. Select HD_360_REQUEST_SYNC.VERSION_2 from the Existing Operations section to open the Operations page.
   c. Select the Routings tab and click HD360_VERSION_2.

      Ensure that other routings are set to *Inactive*, as shown in the following example:

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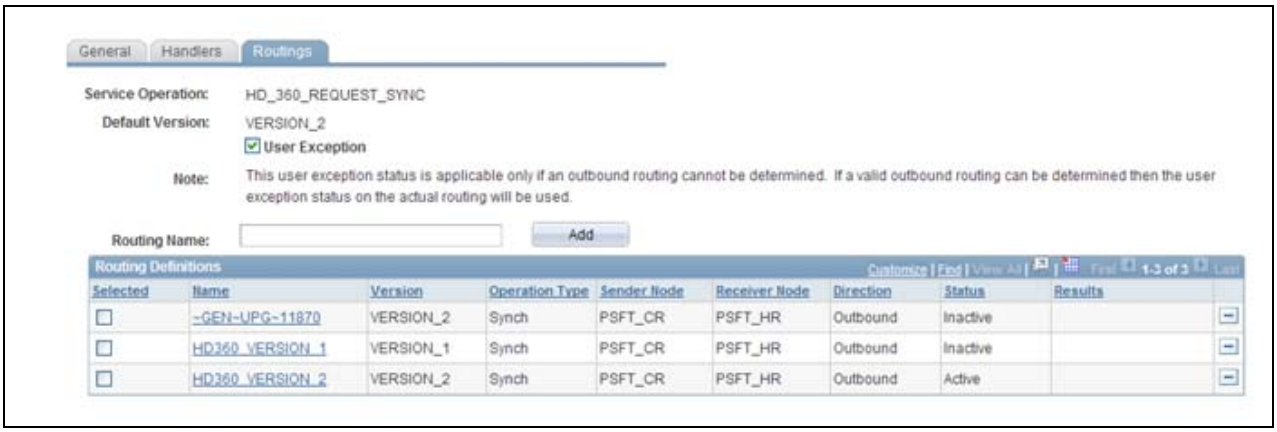
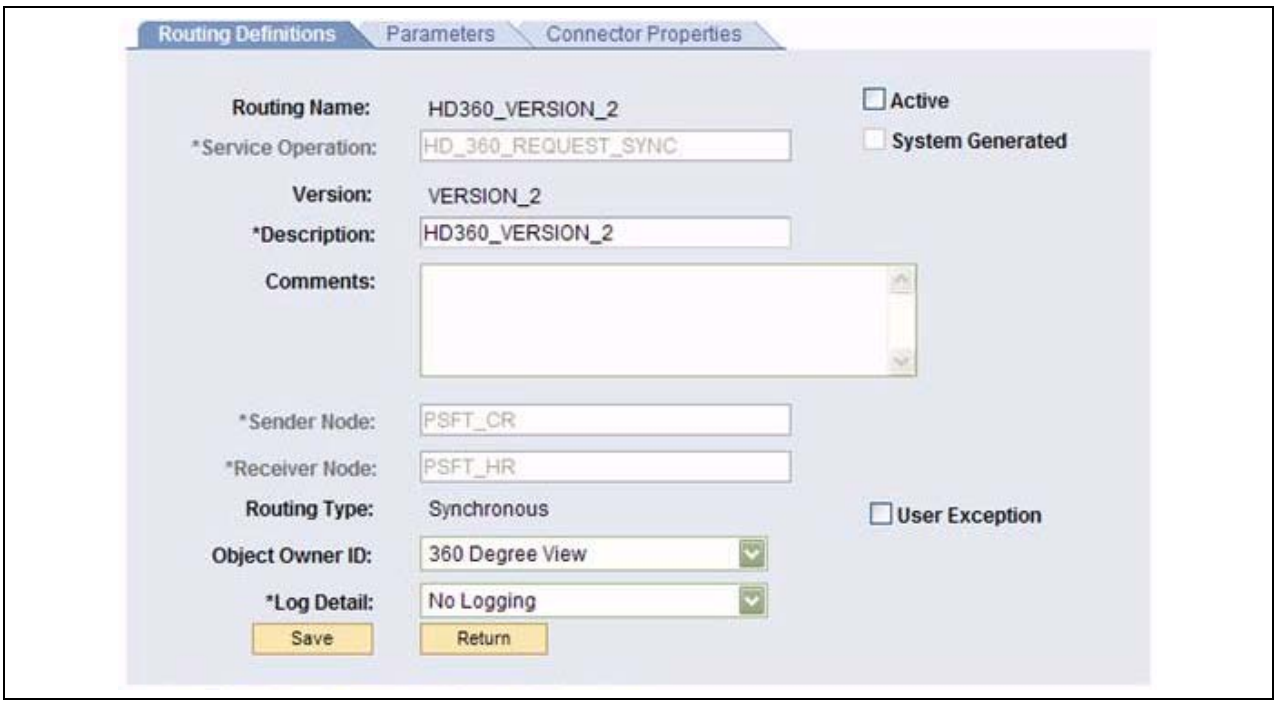


Routings page

d. On the Routing page and the Routing Definitions page, select the Active check box, as shown in the following example:



Routing Definitions page

e. On the Routings page and the Routing Definitions page, verify that the User Exception check box is selected.

f. Click the Save button to save your changes.

Task 8-9: Setting Up Portal Content Links

You must define the portal content to enable the link from the case in PeopleSoft HelpDesk for Human Resources to the 360-Degree View.

To define portal content:

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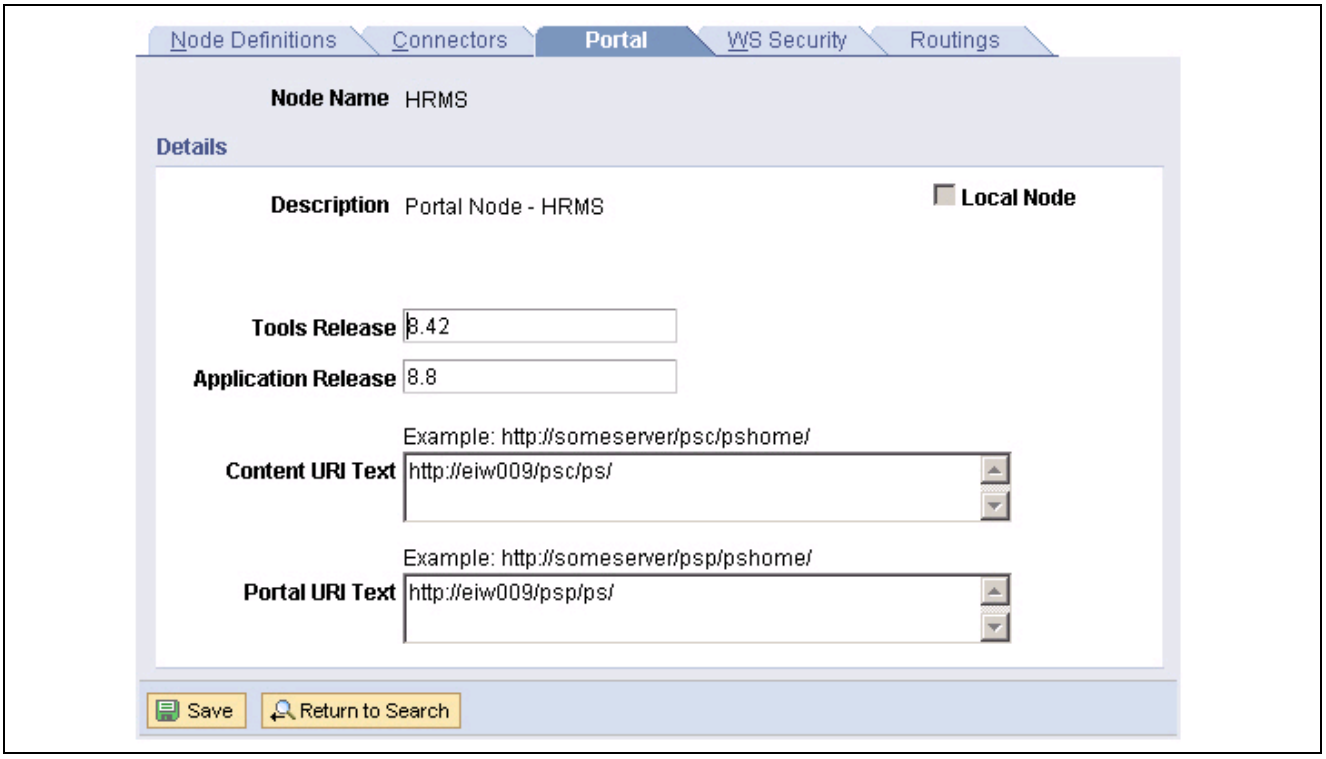
1. In PeopleSoft CRM, access the PeopleSoft HRMS node in the Node Definitions component.
2. Select PeopleTools, Portal, Node Definitions and specify the PeopleSoft HRMS node.
3. In the Node definition component, select the Portal tab, as shown in the following example:



Node Definitions - Portal page

Note. This enables the links on the Case page to directly transfer from PeopleSoft CRM to PeopleSoft HRMS; this must be set up in the Node Definitions under Portal menu folder, *not* in the Integration Broker folder.

4. On the Portal page, enter the content URI text and portal URI text to define how PeopleSoft HRMS system users transfer to and from the PeopleSoft CRM system.
   - Content URI:

     http://<webserver_machine_name>:<Port>/psc/<PIA website name>/
   - Portal URI:

     http://<webserver_machine_name>:<Port>/psp/<PIA website name>/

     The <webserver_machine_name> refers to the PeopleSoft HRMS system and the <Port> value should be an HTTP port.
5. Click Save.

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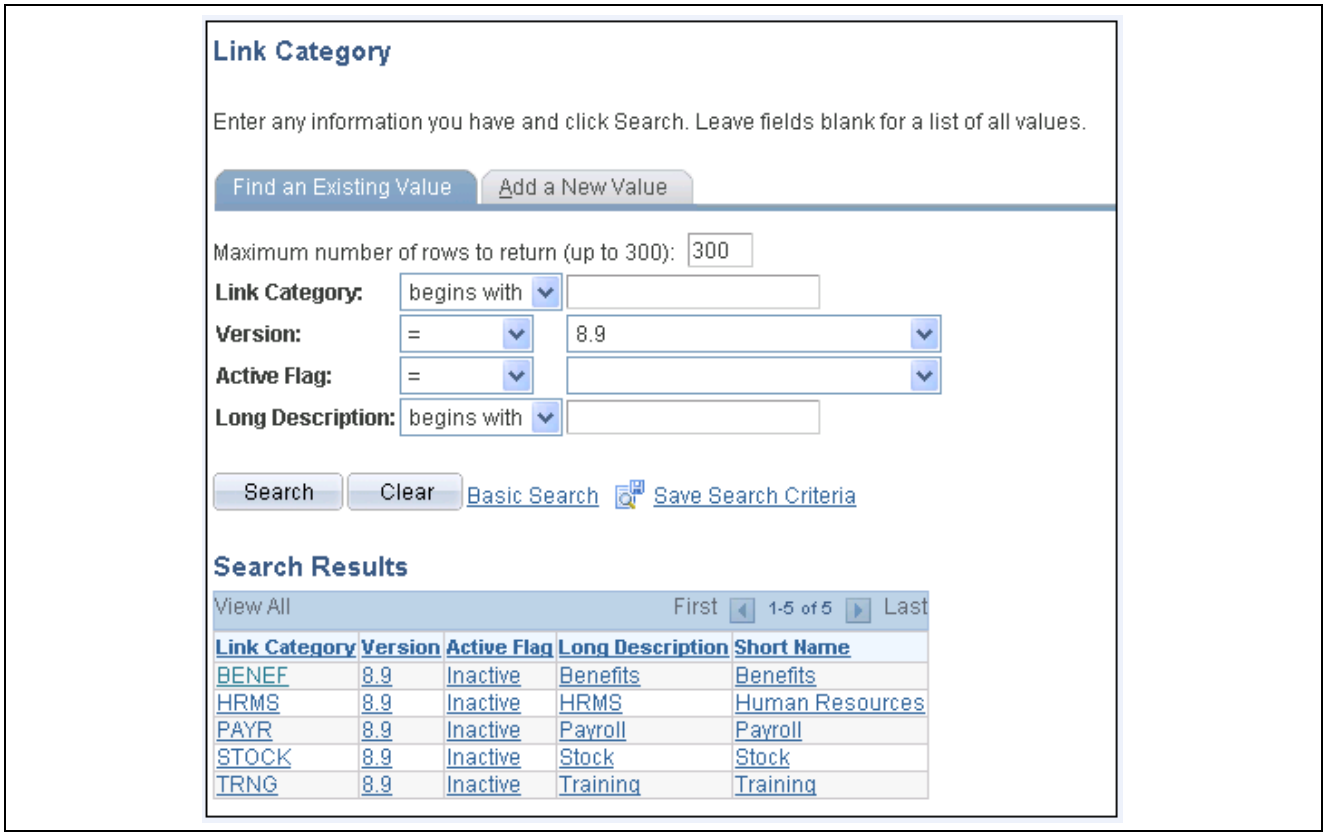
Task 8-10: Activating Link Category for PeopleSoft HRMS 8.9

In PeopleSoft CRM 9.1, the delivered active links are for PeopleSoft HRMS 9.1. If you are integrating to PeopleSoft HRMS 8.9, you must de-activate the 9.1 links and activate the 8.9 links in the PeopleSoft CRM database.

To activate the link category definition for PeopleSoft HRMS 8.9:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Category.
2. Search for version 8.9, as shown in the following example:



Link Category search page

Perform the following steps to activate each link category.

3. Click the Modify System Data button, as shown in the following example:

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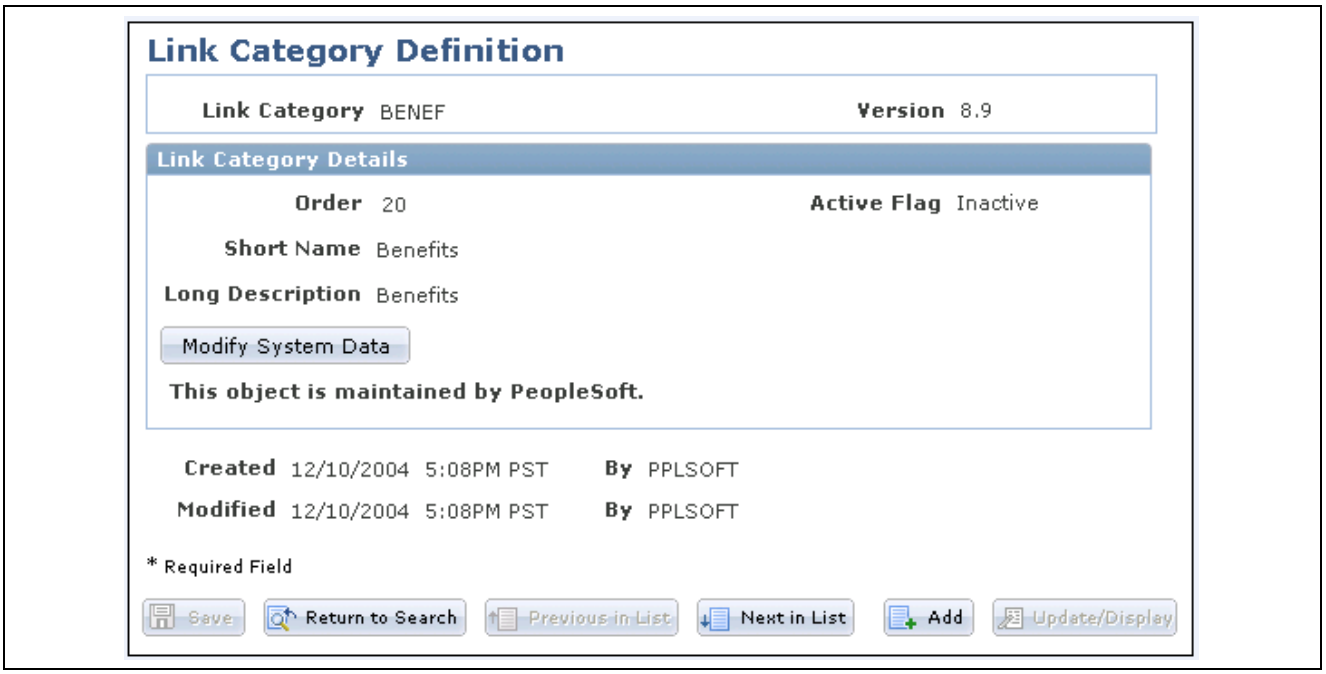
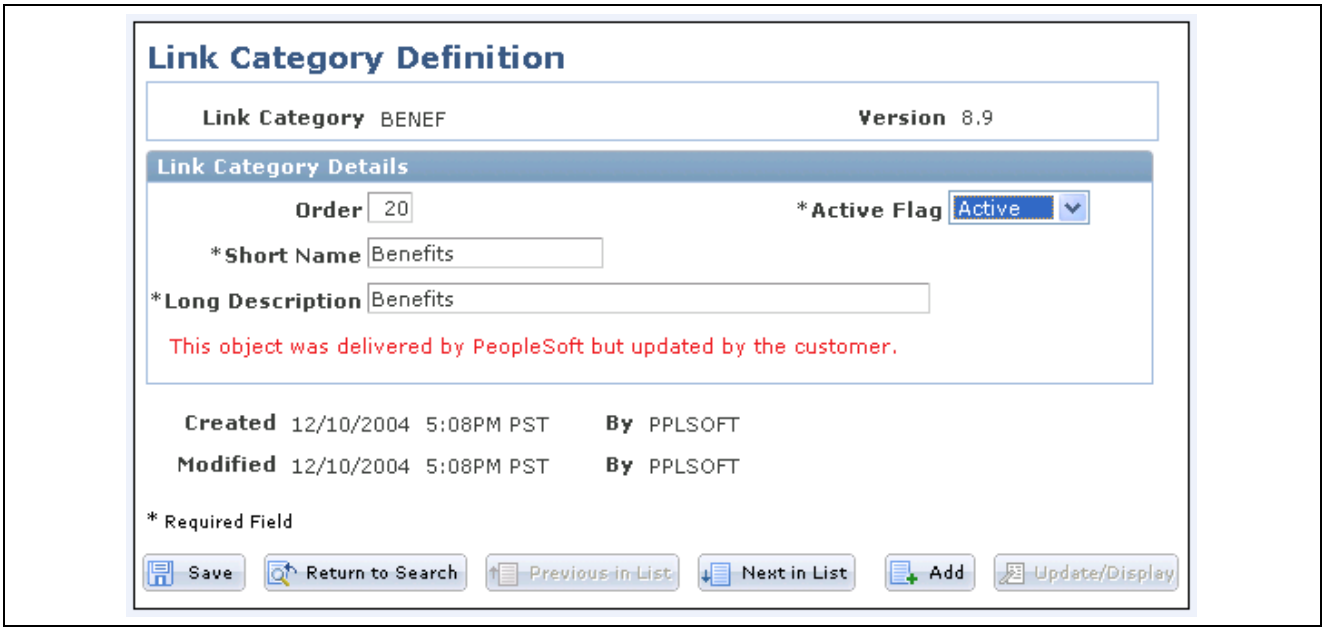


Link Category Definition page

4. Select *Active* from the Active Flag drop-down list box, as shown in the following example:



Updated Link Category Definition page

5. Click Save.
6. Repeat steps 3 through 5 for each 8.9 link category.
7. For delivered active 9.1 action link categories, perform the same steps to de-activate.
8. Select Home, Set Up CRM, Product Related, Call Center, Link Group.
9. Open Link Group HRMS. The data delivered here is for HRMS 9.1. Since version 9.1 is delivered as active links, you must update the 8.9 links.

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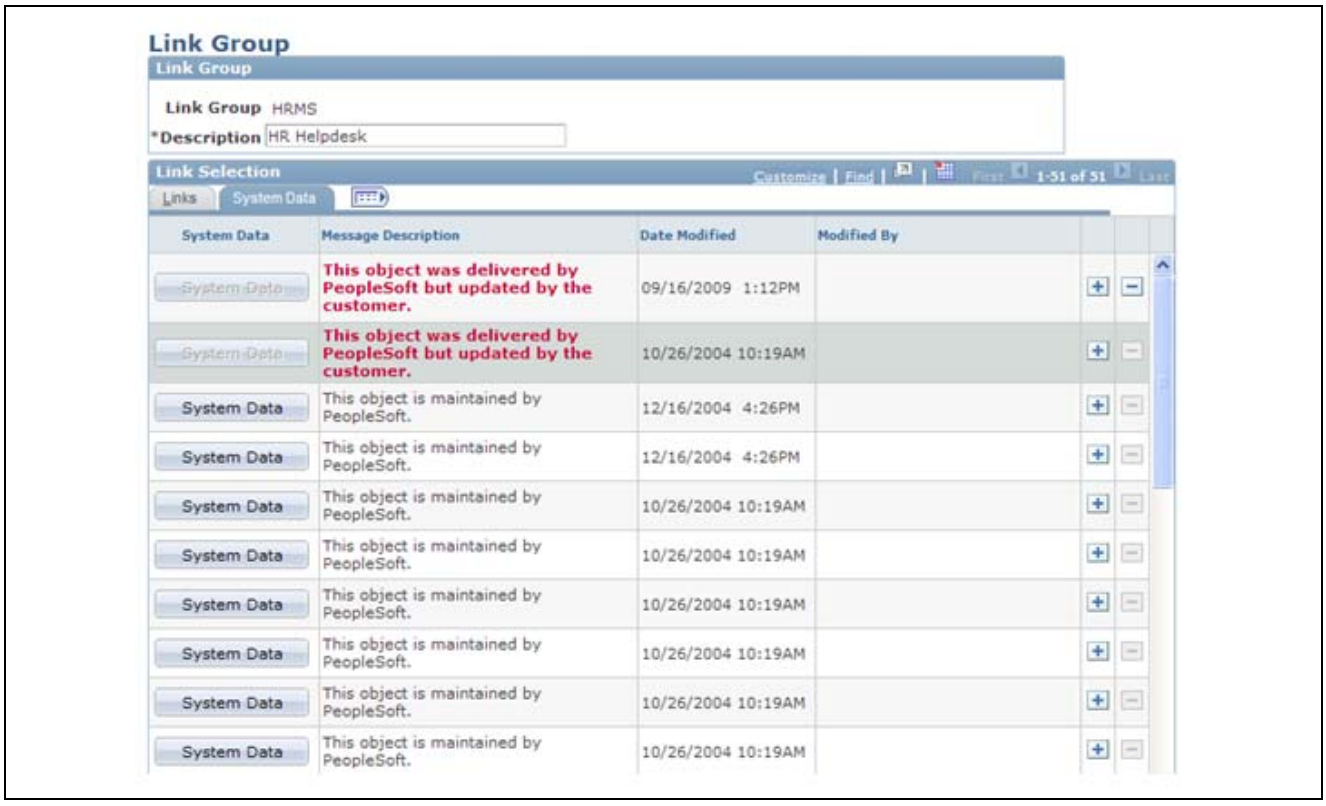
10. Select the System Data tab, and then click the System Data button to modify the system data, as shown in the first few rows of the example that follows. Perform this for *all* rows.

    This example shows the first two rows of the System Data as modified:



System Data tab showing the system data for the link groups being modified

11. Select the Links tab; all rows become editable. The 9.1 version becomes invalid in the version drop-down list box.
12. As all of the links delivered are for 9.1, you must evaluate which links are applicable for 8.9.

    Based on your business needs, do one of the following:

    - Change the version to 8.9 if it is applicable.
    - Delete the row by clicking the Delete (–) button at the end of the row.
    - Add new 8.9 links by clicking the Add (+) button.

The following example shows the Links tab as the version for the link groups is being modified:

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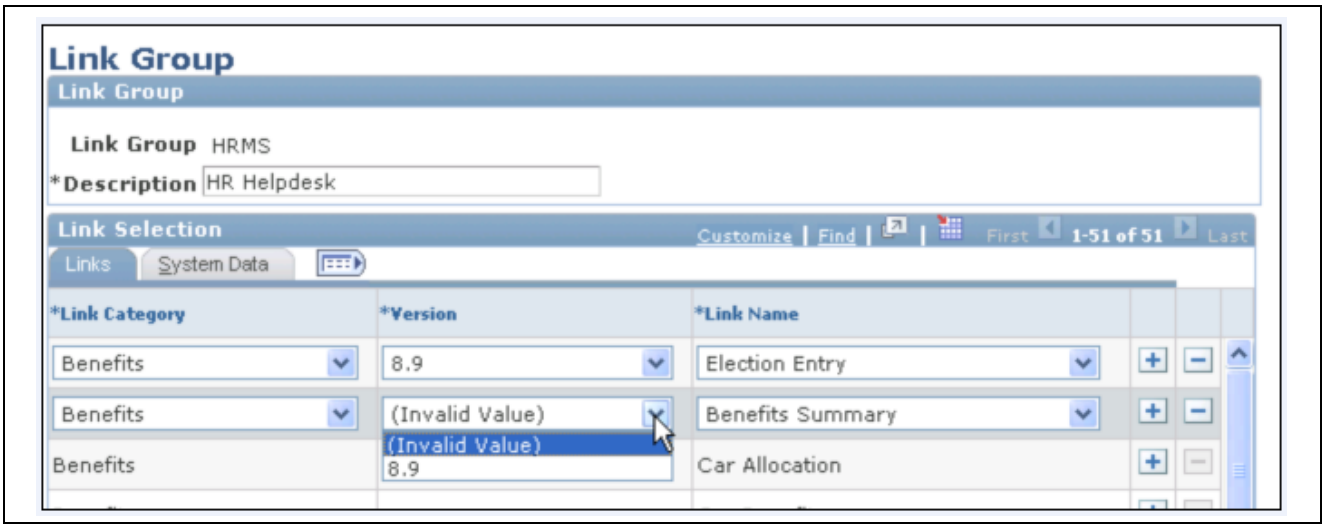

Links tab

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CHAPTER 9

Integrating PeopleSoft CRM and PeopleSoft CS for Higher Education 360-Degree View

This chapter discusses:

- Prerequisites
- Setting Up the Gateway for PeopleSoft CRM and PeopleSoft CS
- Setting Up PeopleSoft Single Signon
- Setting Up the PeopleSoft CRM and PeopleSoft CS Nodes
- Activating the PeopleSoft Higher Education 360 Service Operation and Routing
- Configuring PeopleSoft CS to Define Integration Data
- Setting Up Portal Content Links for Action Links

Prerequisites

This chapter provides instructions for setting up 360-Degree View enterprise integration points (EIP) that are used to enable access to the Higher Education (HE) 360-Degree View from PeopleSoft Customer Relationship Management (CRM).

Before you perform the tasks in this chapter you must install and configure:

- A PeopleSoft Customer Relationship Management (CRM) 9.1 database.
- CRM 9.1 Integrated to Campus Solutions 9.0 Feature Pack 2 provides additional features over CRM 9.1 integrated to earlier versions of Campus Solutions. For more information about this integration, refer to "Appendix B: Getting Started with CRM for Higher Education," in this documentation.

Important! Oracle recommends that you apply service packs or application bundles as they become available to benefit from the latest product level, as well as application and integration requirements. You can access the latest updates, service packs and bundles on My Oracle Support. Consult My Oracle Support before proceeding with your installation.

Task 9-1: Setting Up the Gateway for PeopleSoft CRM and PeopleSoft CS

A gateway must be set up between the PeopleSoft CRM and PeopleSoft CS systems. PSFT_CR is the delivered local node on the PeopleSoft CRM system. PSFT_HR is the delivered local node on the PeopleSoft CS system. The gateway URL defines these two nodes in the gateway property.

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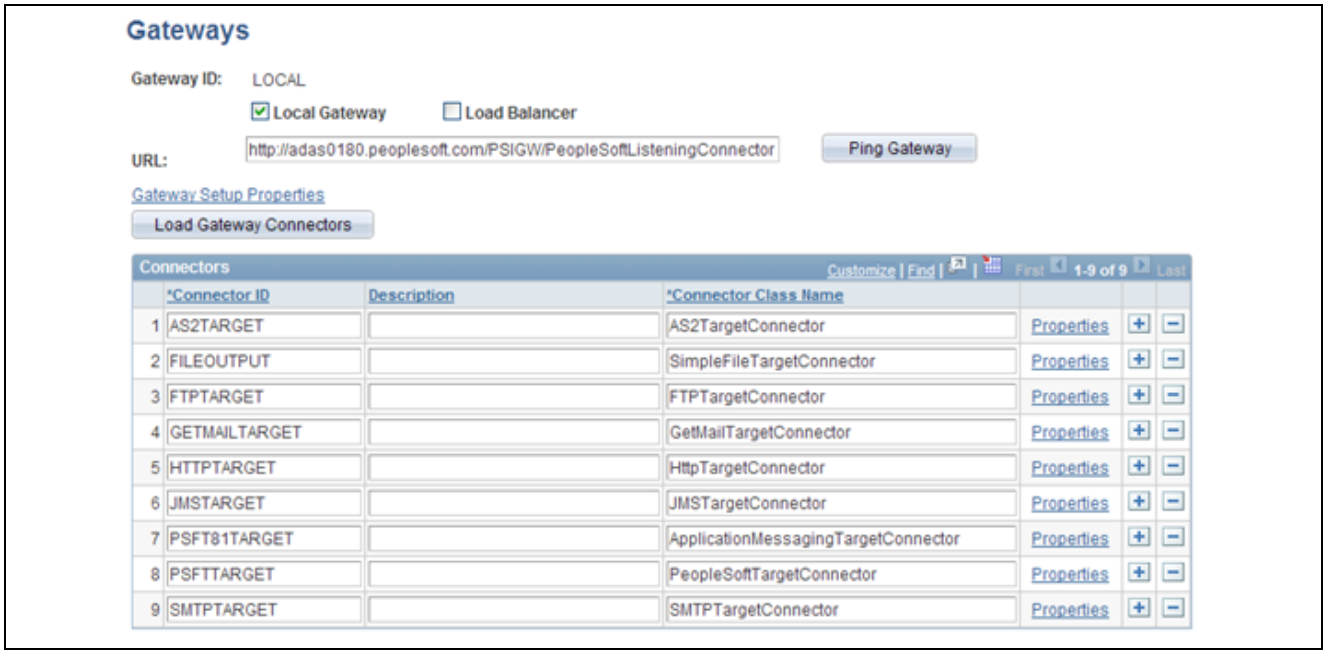
To set up the gateway in both the PeopleSoft CRM and PeopleSoft CS systems:

1. In the PeopleSoft CRM system, access the Gateways page by selecting PeopleTools, Integration Broker, Configuration, Gateways. For example:

   http://<webserver machine name><port>/PSIGW/PeopleSoftListeningConnector

2. Search for and open the *LOCAL* gateway, as shown in the following example:



PeopleSoft Integration Broker - Gateways page

On the Gateways page, do the following:

a. Click the Save button to save the page.

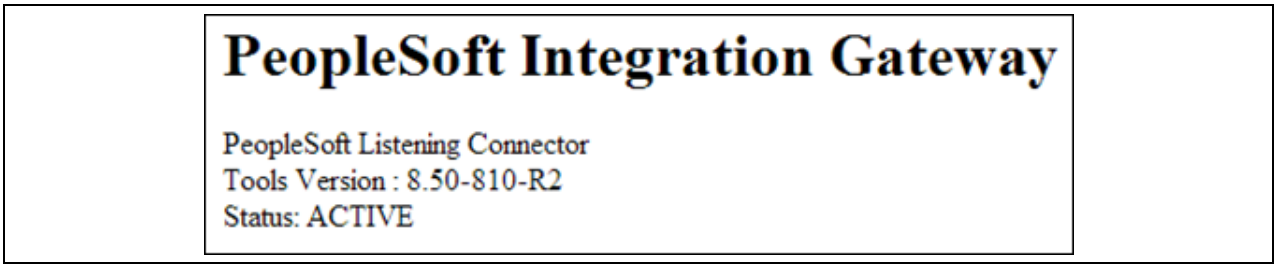
b. Click the Load Gateway Connectors button.

   You will receive a message “Loading process was successful.”

c. Acknowledge the message.

d. Click Save to save the page again.

e. Click the Ping Gateway button, to test your ping and verify that it is successful, as shown in the following example:



PeopleSoft Integration Gateway - PeopleSoft Listening Connector

3. Click the Gateway Setup Properties link to set up local and remote nodes in the gateway, as shown in the following example:

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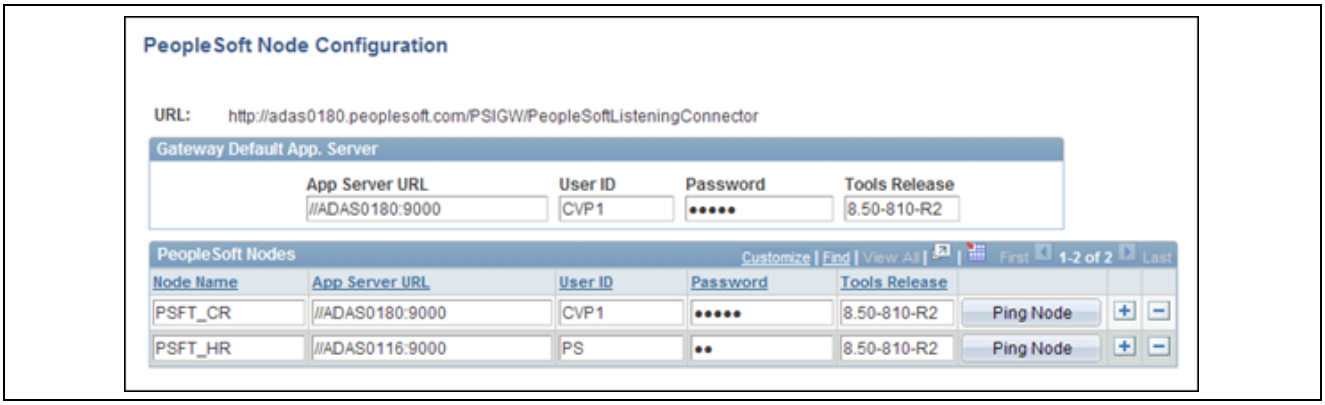

PeopleSoft Node Configuration page in the Gateway

4. Log in to the Gateway Setup Properties.
5. In the PeopleSoft Nodes grid, click the Add (+) button to add the local and remote node information:
   a. In the Node Name column, enter the node name.
   b. In the App Server URL column, enter the application server URL.
   c. In the User ID column, enter the user ID.
   d. In the Password column, enter the password.
   e. In the Tools Release column, enter the PeopleTools release number.
6. Click Save.
7. Click the OK button to return to the Gateway page.
8. Click Save. to save the Gateway page again.
9. Repeat the same Gateway set up steps in the PeopleSoft CS system.

Task 9-2: Setting Up PeopleSoft Single Signon

Integration should be set up to support single signon so that users do not need to sign on to PeopleSoft CS manually when transferring from the PeopleSoft CRM to the PeopleSoft CS systems. To do this, you must define the remote node as a trusted node in each system.

To set up the remote node as a trusted node in both the PeopleSoft CRM and PeopleSoft CS systems:

1. In the PeopleSoft CRM system, access the Single Signon page by selecting PeopleTools, Security, Security Objects, Single Signon.

   The default is to add the local node as a trusted node, as shown in the following example:

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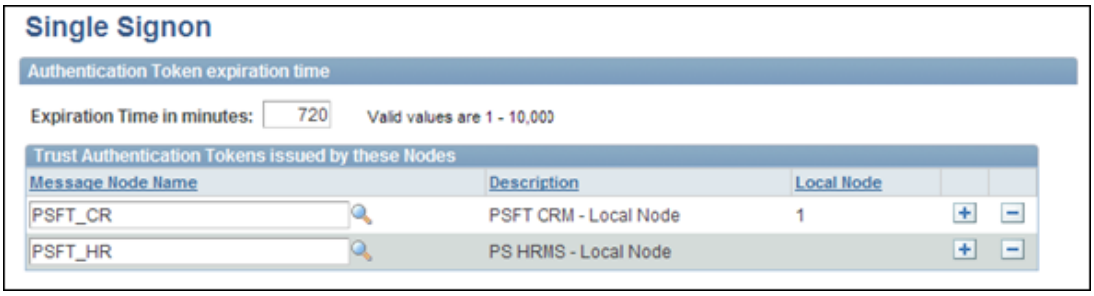

PeopleSoft Single Signon page - Trust Authentication Tokens issued by these Nodes grid

2. Specify the remote node PSFT_HR as a trusted node by adding it to the Trust Authentication Tokens issued by these Nodes grid:
   a. In the Message Node Name column, select the *PSFT_HR* node.
   b. Click Save.
3. Repeat the same steps in the PeopleSoft CS system.

Task 9-3: Setting Up the PeopleSoft CRM and PeopleSoft CS Nodes

This section discusses:

- Setting Up the Authentication Option for the PSFT_CR Node (Optional)
- Defining a PSFTTARGET Connector ID for Nodes in PeopleSoft CRM and PeopleSoft CS
- Pinging the PeopleSoft CRM and PeopleSoft CS Nodes to Verify Configuration

Task 9-3-1: Setting Up the Authentication Option for the PSFT_CR Node (Optional)

You can set a password authentication option for the PSFT_CR and the PSFT_HR nodes and define the same password for the node in both systems. This task is optional.

To set up the authentication option for the PSFT_CR node:

1. Access the PeopleSoft CRM system, and select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the *PSFT_CR* node.

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

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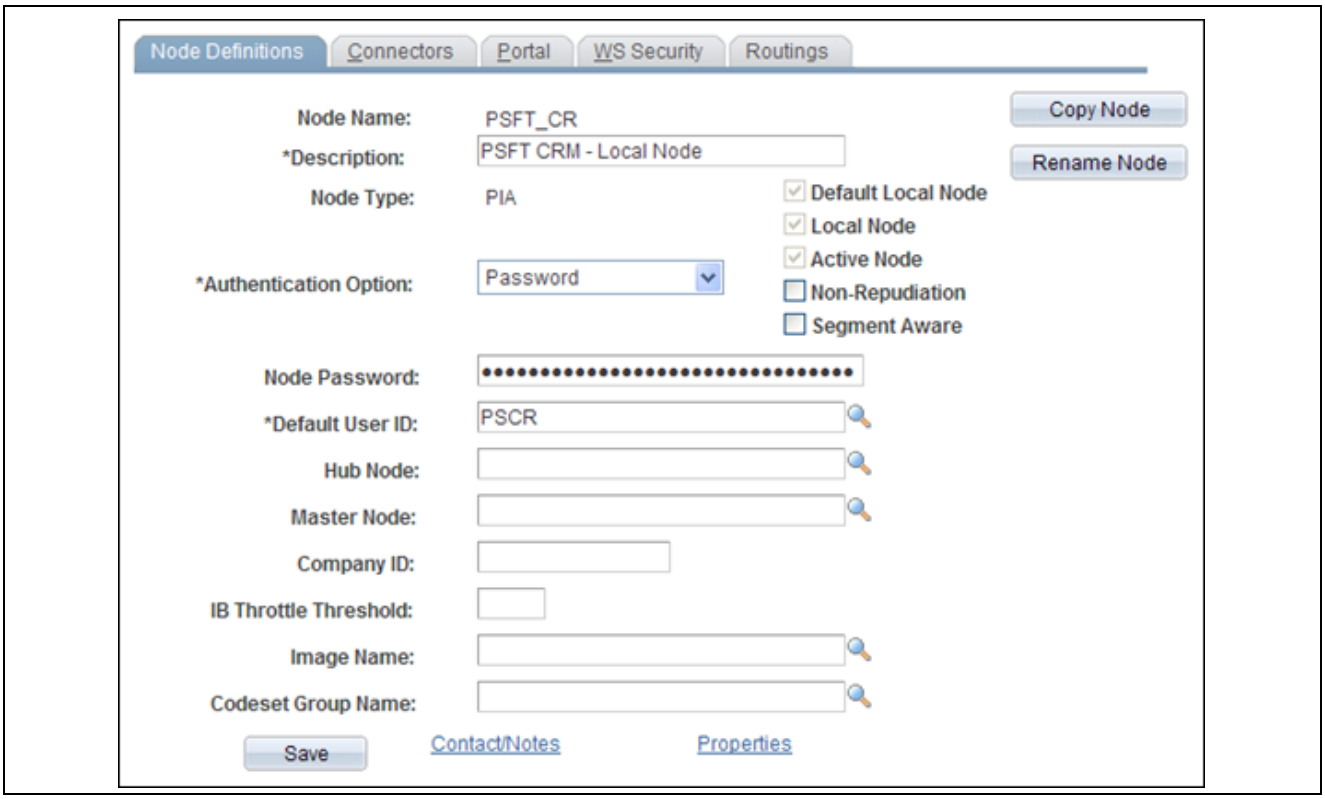

PeopleSoft Integration Broker - Nodes: Node Definitions page

3. On the Node Definitions page, specify a password authentication option for the PSFT_CR node.
4. On the Node Definitions page (in the PeopleSoft CRM system), select *Password* from the Authentication Option drop-down list box for the PSFT_CR node.
5. In the Password field, enter an appropriate password. The default password is *PSOFT*.
6. Access the same PSFT_CR node from the PeopleSoft CS system.
7. On the Node Definitions page (in the CS system), select *Password* from the Authentication Option drop-down list box for the PSFT_CR node.
8. In the Password field, enter the same password as you did in the PeopleSoft CRM system.
9. Repeat the steps in this task for the PSFT_HR node, if it needs to be password authenticated.

Task 9-3-2: Defining a PSFTTARGET Connector ID for Nodes in PeopleSoft CRM and PeopleSoft CS

To define a PSFTTARGET connector ID for nodes in PeopleSoft CRM and PeopleSoft CS:

1. Access the PeopleSoft CRM system. Select Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the PSFT_CR node.

   The Node Definitions page appears.
3. Click the Connectors tab to access the Connectors page, as shown in the following example:

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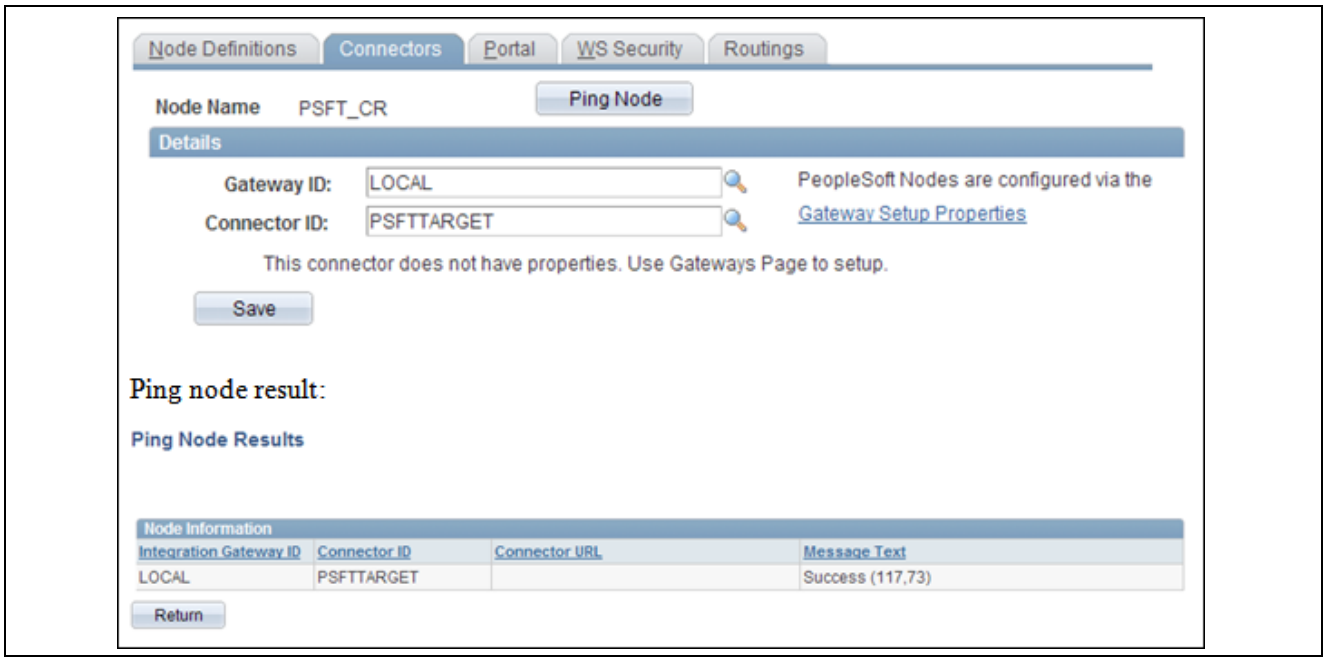


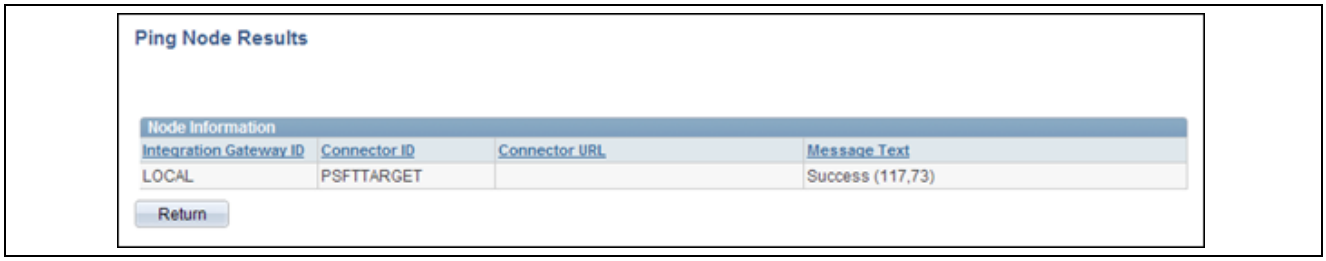
PeopleSoft Integration Broker - Nodes: Connectors page

4. Specify *PSFTTARGET* as the connector ID for the PSFT_CR and the PSFT_HR nodes.
5. Click Save.
6. Repeat these steps for the PSFT_HR node in the PeopleSoft CRM system.
7. Access the PeopleSoft CS system and repeat the same steps for both the PSFT_HR and the PSFT_CR nodes.

Task 9-3-3: Pinging the PeopleSoft CRM and PeopleSoft CS Nodes to Verify Configuration

To ping the PSFT_HR and PSFT_CR nodes:

1. Access the PeopleSoft CRM system. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for and open the *PSFT_CR* node.
3. Click the Node Connectors tab to access the Node Connectors page.
4. Click the Ping Node button to test for successful communication, as shown in the following example:



Ping Node Results page

5. On the Ping Node Results page, verify that *Success* appears in the Message Text column.
6. Click the Return button to return to the Connectors page.
7. Click the Return to Search link.

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8. Search for and open the *PSFT_HR* node.
9. Click the Connectors tab to access Connector page.
10. Click the Ping Node button to test for successful communication.
11. On the Ping Node Results page, verify that *Success* appears in the Message Text column.
12. Click the Return button to return to the Connectors page.
13. Access the PeopleSoft CS system and repeat the same steps in this task for both the PSFT_CR and the PSFT_HR nodes.

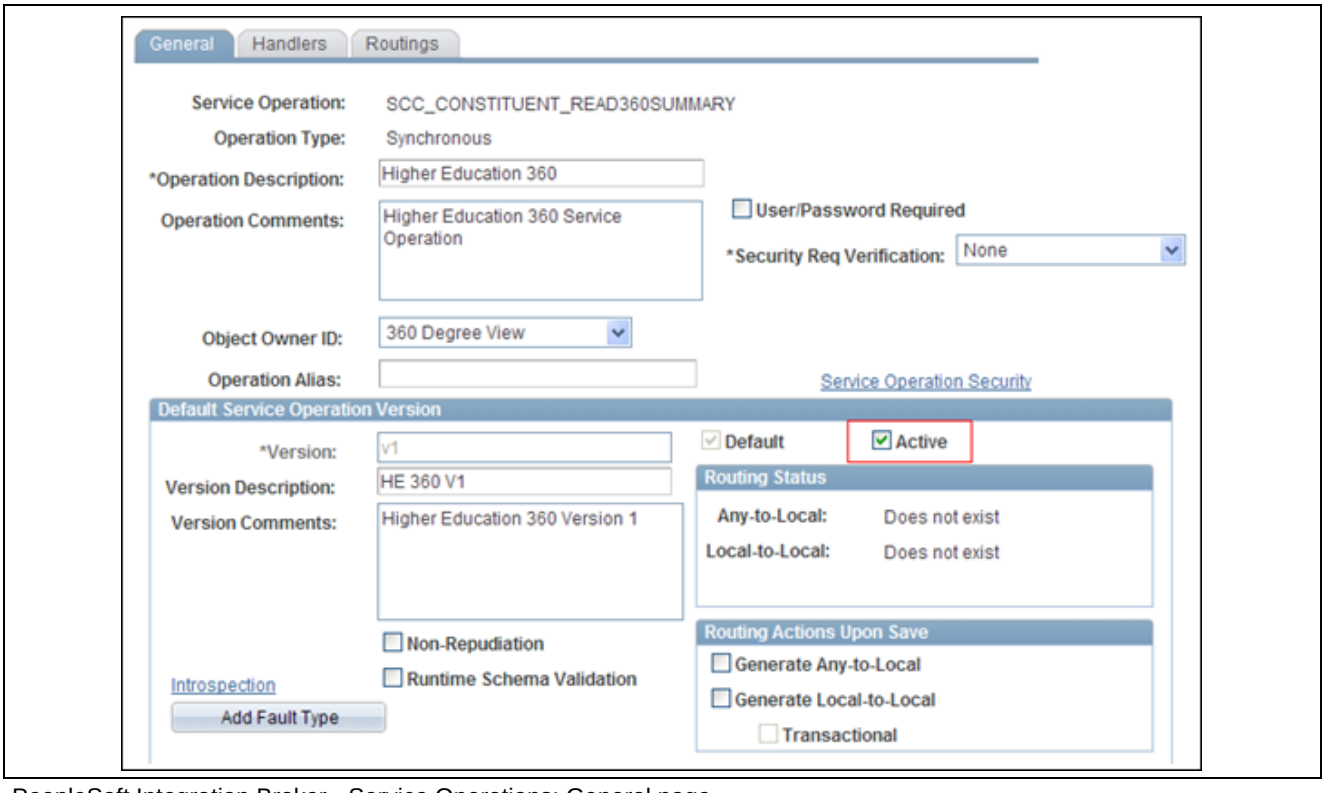
Note. All previous steps must be followed in order to receive successful pings.

Task 9-4: Activating the PeopleSoft Higher Education 360 Service Operation and Routing

In the PeopleSoft CRM and the PeopleSoft CS systems, activate both the service operation and the routing for PeopleSoft Higher Education (HE) 360–Degree View.

To activate the HE 360-Degree View service operation and routing:

1. In the PeopleSoft CRM system, select PeopleTools, Integration Broker, Integration Setup, Service Operations to access the Service Operations pages.
2. Search for and open service operation *SCC_CONSTITUENT_READ360SUMMARY*, as shown in the following example:



PeopleSoft Integration Broker - Service Operations: General page

3. On the General page, ensure that the Active check box is selected.

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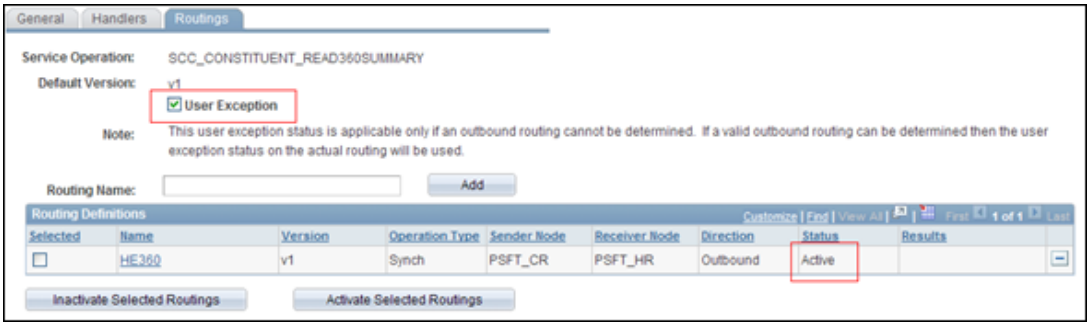
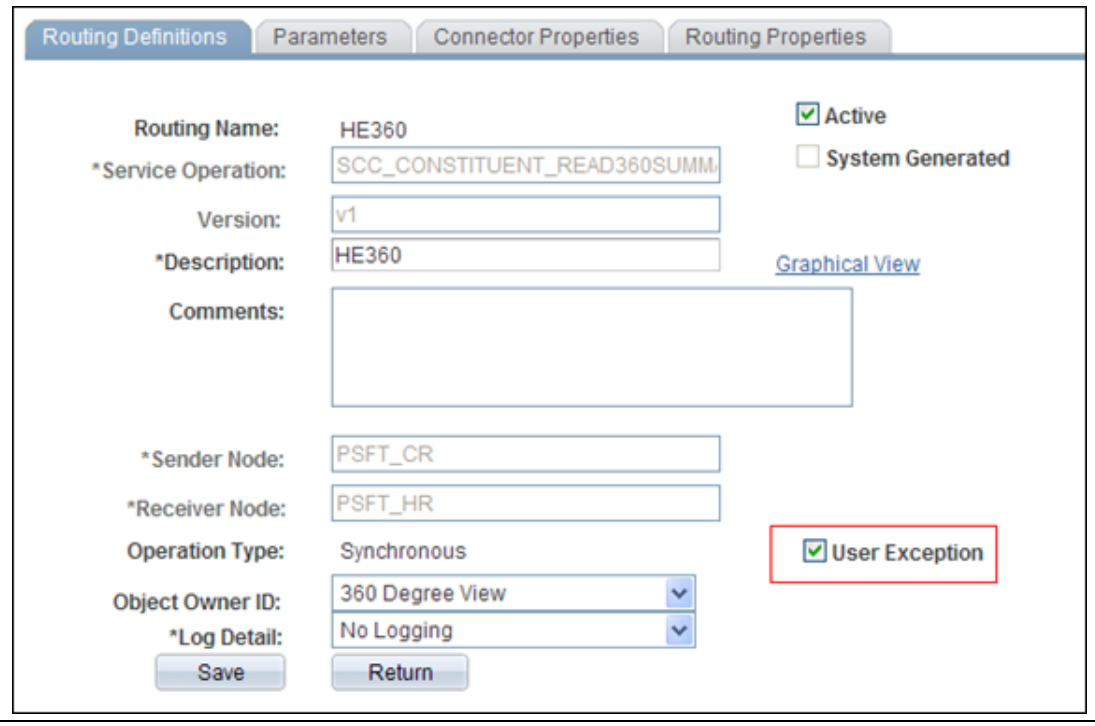
4. Click the Routings tab to access the Routings page, as shown in the following example:



PeopleSoft Integration Broker - Service Operations: Routings page

5. In the Status column, verify that only one routing shows as *Active* from sender node PSFT_CR to receiver node PSFT_HR.
6. On the Routings page, verify that the User Exception check box is selected.
7. In the Routing Definitions section, click the HE360 link to access the Routings Definition page, as shown in the following example:



Routings Definition page

8. On the Routings Definition page, verify that the User Exception check box is selected.
9. Access the PeopleSoft CS system and repeat the same steps in this task to activate service operation and routing for PeopleSoft HE 360.

Important! While in the PeopleSoft CS system, click the Handlers tab to access the Handlers page and verify that the handler Status is set to *Active*, as shown in the following example:

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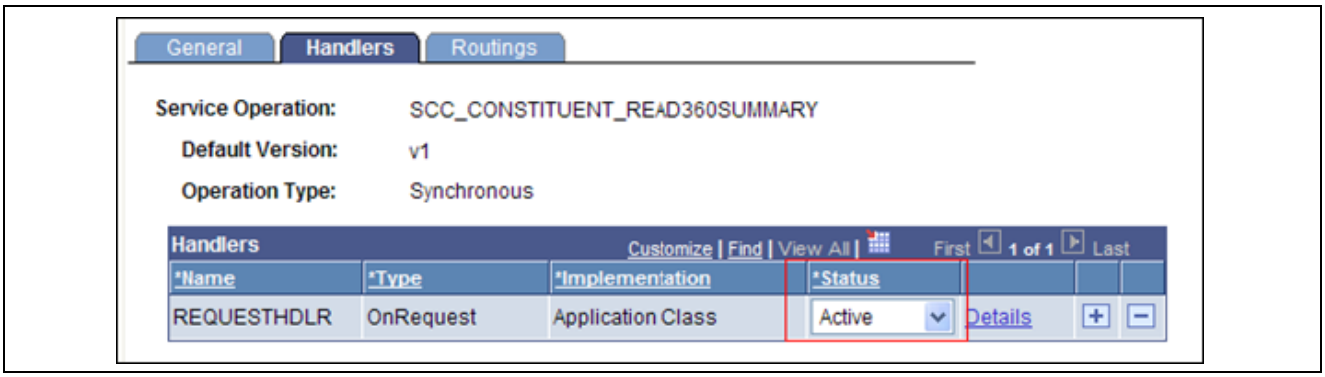


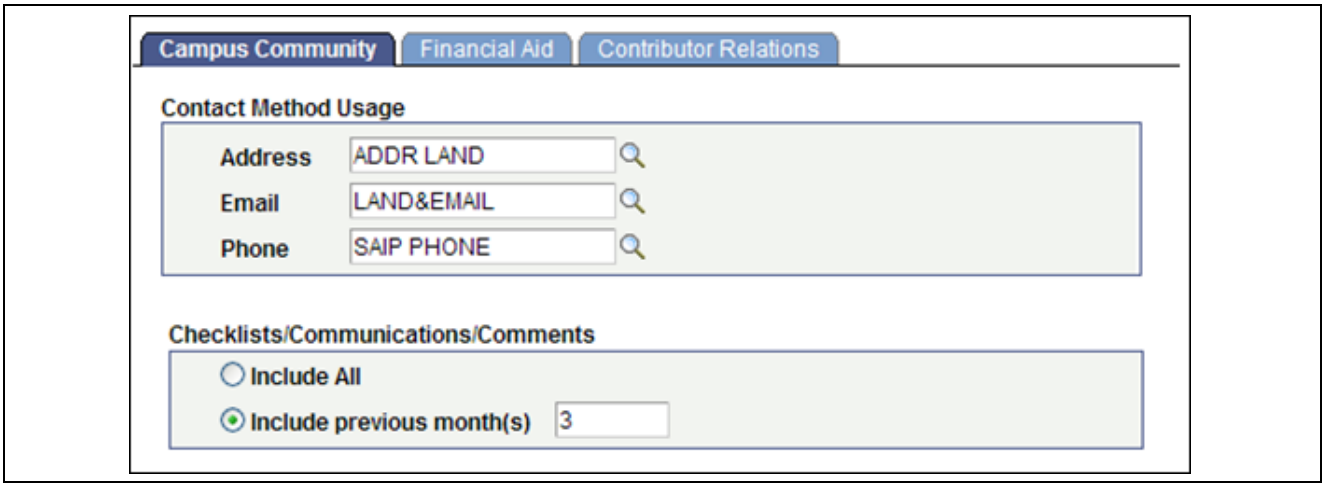
PeopleSoft Integration Broker - Service Operations: Handlers page

Task 9-5: Configuring PeopleSoft CS to Define Integration Data

After you complete the PeopleSoft HE 360-Degree View EIP setup, you can set up the configuration in PeopleSoft CS to define the integration data, based on your business requirements.

Use the Campus Community configuration pages to define the integration parameters for the PeopleSoft CS Campus Community, Financial Aid, and Contributor Relations pages, based on your particular user base and business requirements.

1. Select Setup SACR, System Administration, Integrations, Configure Integrations.
2. Click the Campus Community tab to access the Campus Community page, as shown in the following example:



PeopleSoft Campus Solutions - Campus Community page

3. In the Contact Method Usage section of the Campus Community page, specify the type of Address, Email, and Phone that the system will use to retrieve PeopleSoft CS data for the PeopleSoft HE 360 profile.
4. In the Checklists/Communications/Comments section, specify the amount of 3C data that the system will retrieve from PeopleSoft CS.

   The default value is *3* months for performance concerns.
5. Click the Financial Aid tab to access the Financial Aid page, as shown in the following example:

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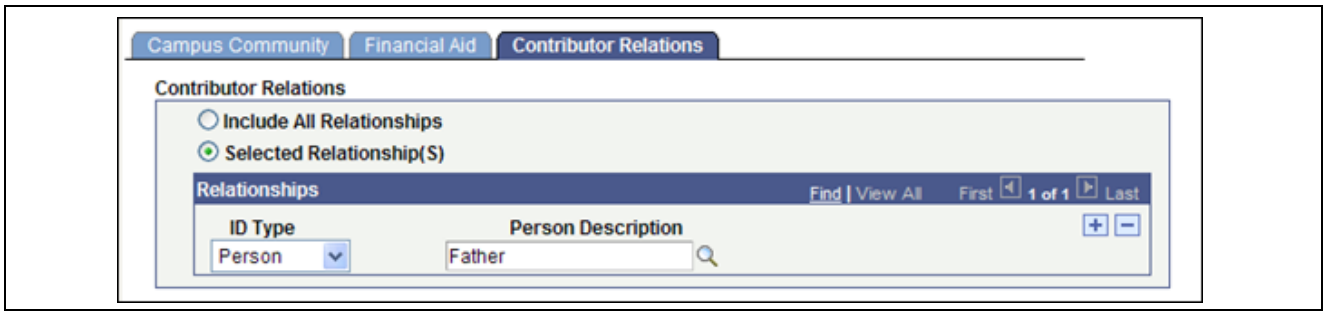
PeopleSoft Campus Solutions - Financial Aid page

6. On the Financial Aid page, do one of the following:
   - Select the Include All option to retrieve all financial aid information for PeopleSoft HE 360.
   - Select the Selected Financial Aid Year(s) option, and then select the Institution and Aid Year from which you want the system to retrieve the information.

1. Click the Contributor Relations tab to access the Contributor Relations page, as shown in the following example:



PeopleSoft Campus Solutions - Contributor Relations page

2. On the Contributor Relations page, do one of the following:
   - Select the Include All option to retrieve all relationships for contributor relations.
   - Select the Relationship(s) option to specify the relationship types (ID Type and Person Description) to be retrieved for PeopleSoft HE 360.

Task 9-6: Setting Up Portal Content Links for Action Links

To enable action links of Higher Education Case to access PeopleSoft CS, you must define the portal content. Oracle delivers all action links as defined under the portal node HRMS.

To define portal content:

1. In the PeopleSoft CRM system, select PeopleTools, Portal, Node Definitions.
2. Search for and open the *HRMS* node to access the Node Definitions page.
3. Select the Portal tab to access the Portal Content page, as shown in the following example:

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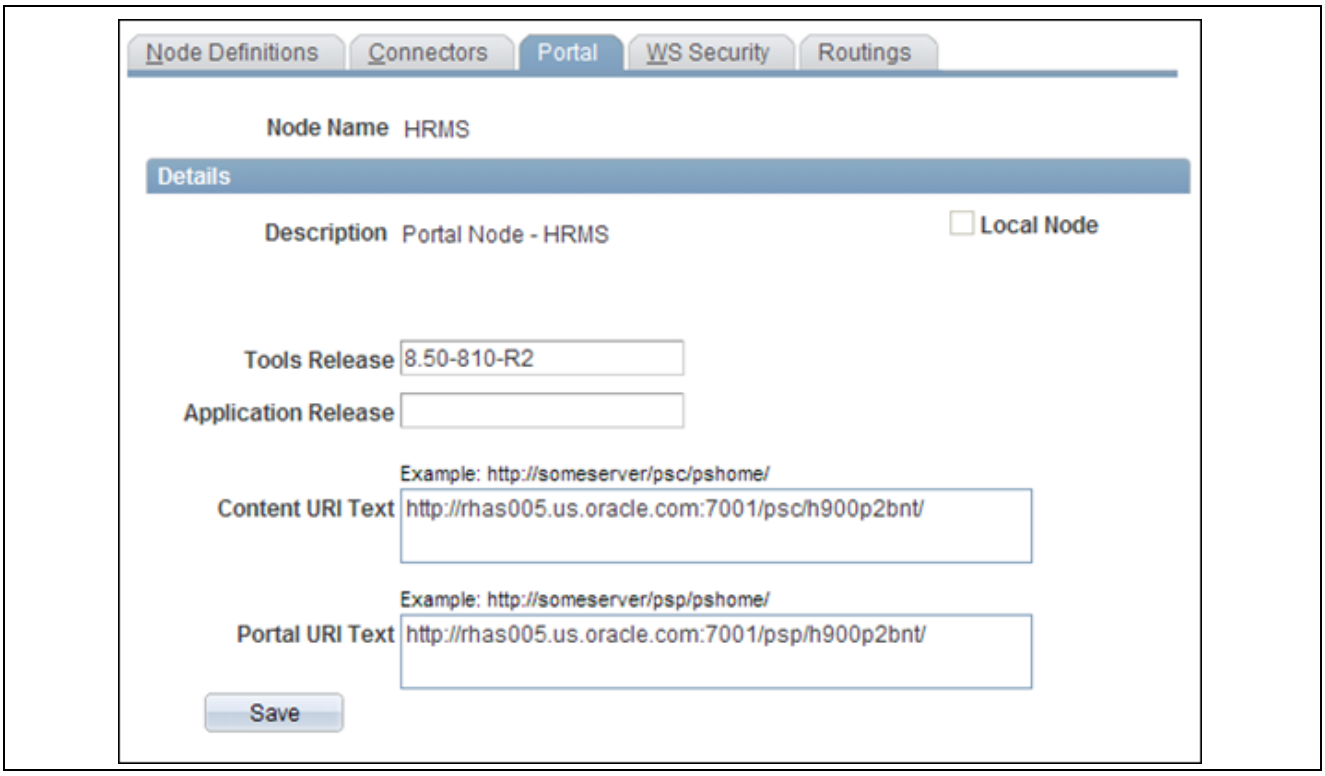

PeopleSoft Portal - Node Definitions: Portal page showing the Content URI Text and Portal URI Text defined

Note. This is for action links on PeopleSoft CRM Case page to access PeopleSoft CS. This is only necessary for action links. The Node Definition required for this step is under the Portal menu, not the Integration Broker menu.

4. In the Content URI Text and Portal URI Text fields, enter the URI text to define the PeopleSoft CS system that users will transfer to from the PeopleSoft CRM system.

   For example:

   - Content URI: http://<webserver machine name>:<Port>/psc/<PIA website name>/
   - Portal URI: http://<webserver machine name>:<Port>/psp/<PIA website name>/

5. Click Save.

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CHAPTER 10

Deploying and Configuring the PeopleSoft Connector and the Oracle Enterprise Manager Console

This chapter discusses:

- Prerequisites
- Copying the JAR File
- Deploying and Registering the PeopleSoft Connector
- Troubleshooting the PeopleSoft Connector Registration
- Configuring the PeopleSoft Connector

Prerequisites

To enable integration between the PeopleSoft Connector and the Oracle Enterprise Manager Console you must:

- Copy the JAR file to the Oracle Enterprise Manager (EM) server.
- Deploy, register, and configure the PeopleSoft Connector.

Important! Some existing connectors may be delivered with the Oracle EM installation; for example, the Remedy Connector. Before you deploy the PeopleSoft Connector, ensure that you remove the Remedy Connector or any other existing connectors. Oracle EM does not support multiple active connectors simultaneously.

To remove the Remedy Connector, or any other existing connectors:

1. Login to the Oracle EM Console and select Setup, Management Connectors.

   Here you can access a list of all connectors currently registered in the system.
2. Select the Remedy or other existing connector and click the Remove button.
3. Click Save.

Note. Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft PeopleTools 8.52 Installation guide for your database platform and PeopleSoft PeopleTools 8.52 PeopleBooks.

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Note. Consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

Note. Before you begin your deployment and configuration of the PeopleSoft Connector and the Oracle Enterprise Manager Console, consult the PeopleSoft CRM 9.1 Hardware and Software Requirements Guide available on My Oracle Support for the latest supported platform information.

Note. The deployment commands that are used in this installation guide are applicable for Oracle EM 10gR3 and 10gR4.

Task 10-1: Copying the JAR File

Oracle delivers the JAR file *PSFTConnector.jar* that includes the Oracle EM Event Model XML, the PeopleSoft Connector Descriptor XML, and the sample template XSLT files that are discussed in this documentation.

Copy the PSFTConnector.jar file from <*PS_APP_HOME*>\src\xml\enterprise manager\ to the Oracle EM server.

For Oracle EM 10gR3 and 10gR4 the file should be copied to: $ORACLE_HOME\sysman\connector\

This depends upon where you install Oracle home. $ORACLE_HOME can be: *c:\oracleHomes\oms10g*

Task 10-2: Deploying and Registering the PeopleSoft Connector

Several Oracle EM Command-Line Utility (emctl) commands are used to deploy and register the PeopleSoft Connector.

To extract the JAR file into $ORACLE_HOME/sysman/connector/<connector_name_wo_space>directory:

1. Enter this command: `emctl extract_jar connector <jar_file_name> <connector_name> <oracle_home>`

   For example:

   C:\OracleHomes\oms10g\bin\emctl extract_jar connector C:\OracleHomes\oms10g\sysman\connector \PSFTConnector.jar "Peoplesoft Connector"C:\OracleHomes\oms10g

   Note. The connector name is the name specified in the connector descriptor XML file. The command replaces the spaces in the connector name with underscores (_) in connector_name_wo_space.

   For example, a connector named PeopleSoft Connector will have a directory of Peoplesoft_Connector under the directory of the Oracle home connector. If the Peoplesoft_Connector directory already exists, the extract_jar command will extract files to this directory. Otherwise, it will create a new directory called Peoplesoft_Connector and copy the files to this new directory.

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2. Register the connector by entering this command: `emctl register_connector connector <PSFTConnectorDescriptor.xml> <serverName> <port> <databaseSid> <username> <password> <oracle_home>`

   Note. The Username for the register connector must be *sysman.*

   For example:

   C:\OracleHomes\oms10g\BIN>emctl register_connector connector C:\OracleHomes\oms10g\sysman \connector\Peoplesoft_Connector\PSFTConnectorDescriptor.xml adnttp39.peoplesoft.com 1521 EMREPDEV sysman sysman C:\OracleHomes\oms10g

3. Oracle delivers two templates:

   - The PeopleSoft Sample Template: Used to create or update a case.
   - The PeopleSoft Auto-Close Template: Automatically closes out an open case with a solvable EM action.

   Register the delivered templates by entering this command: `emctl register_ticket_template connector <PSFTSampleTicketTemplate.xsl> <serverName> <port> <databaseSid> <username> <password> <connectorTypeName> <connectorName> <templateName> <templateDescription>`

   The <connectorTypeName> <connectorName> <templateName> <templateDescription> are quoted strings. The <templateName> and <templateDescription> can have spaces in them.

   The template name and description are displayed on the Oracle EM console.

   For example:

   C:\OracleHomes\oms10g\BIN>emctl register_ticket_template connector c:\OracleHomes\oms10g \sysman\connector\Peoplesoft_Connector\PSFTSampleTicketTemplate.xsl adnttp39.peoplesoft.com 1521 EMREPDEV sysman sysman “Peoplesoft Connector” “Peoplesoft Connector” “Sample Ticket” “Sample Ticket Template”

   Note. Because the Oracle EM Connector can only support one active connector, ensure that you delete the connector from the console. After you redeploy a connector, you must re-register the templates, even if they have not changed. This is because the templates are disconnected at the time the connector is deleted.

The following table lists the values for the parameters:

Parameters	Description
connector_name_wo_space	Specify *Peoplesoft Connector*. The command will replace the spaces in the connector name with underscores (_) in connector_name_wo_space. A new directory called Peoplesoft_Connector will be created and copy the files to this new directory under $Oracle_Home/connector. If the Peoplesoft_Connector directory already exists, the extract_jar command will extract files to this directory.
PSFTConnectorDescriptor.xml	The file resides in the Peoplesoft_Connector directory home upon succesful extraction: i.e: $ORACLE_HOME/connector/Peoplesoft_Connector/
PSFTSampleTicketTemplate.xls	A sample ticket template that is used to create or update a case.
server	Host name of the Oracle Enterprise Manager repository. For example: *adnttp39.peoplesoft.com*

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Parameters	Description
port	Oracle Listener port of the repository. For example: *1521*
database sid/ Service Name	Repository database instance ID. For example: *EMREPDEV*
username	Specify *SYSMAN*.
password	Password for SYSMAN.
connectorTypeName	Specify "Peoplesoft Connector". The double quotes ("") are mandatory. The connector is case sensitive and should match the name specified in the PSFTConnectorDescriptor.xml.
connectorName	Specify "Peoplesoft Connector". The double quotes ("") are mandatory.
templateName	An intuitive name for the ticket template that will be displayed in the Oracle Enterprise Manager. The double quotes ("") are mandatory. For example: *"Sample Ticket"*
description	A short description for the ticket template. This description is also displayed in the Oracle Enterprise Manager. The double quotes ("") are mandatory. For example: *"Sample Ticket Template"*

Task 10-3: Troubleshooting the PeopleSoft Connector Registration

If an incorrect template is registered that is tied to a invalid connector, and the template cannot be deleted from the Oracle EM console, do the following:

1. Connect to the EM repository as SYSMAN.
2. SELECT prop_name, value_id FROM mgmt_cntr_config WHERE config_name = 'TicketTemplates';

   You can retrieve the template name (prop_name) from this query. This should be the same name as the name of the file that you registered as the template.

   :prop_name and *: value_id* that you get here will be used in the following commands:

   a. `DELETE FROM mgmt_cntr_l_val WHERE value_guid = :value_id;`

   b.
   ```
   DELETE
   FROM mgmt_cntr_s_val WHERE value_guid IN (SELECT value_id FROM
   mgmt_cntr_config WHERE config_name = :prop_name);
   ```

   c.
   ```
   DELETE
   FROM mgmt_cntr_config WHERE prop_name = :prop_name OR config_name
   = :prop_name;
   ```

   d.
   ```
   EXEC mgmt_notification.delete_device
   ('SYSMAN', ':prop_name');
   ```


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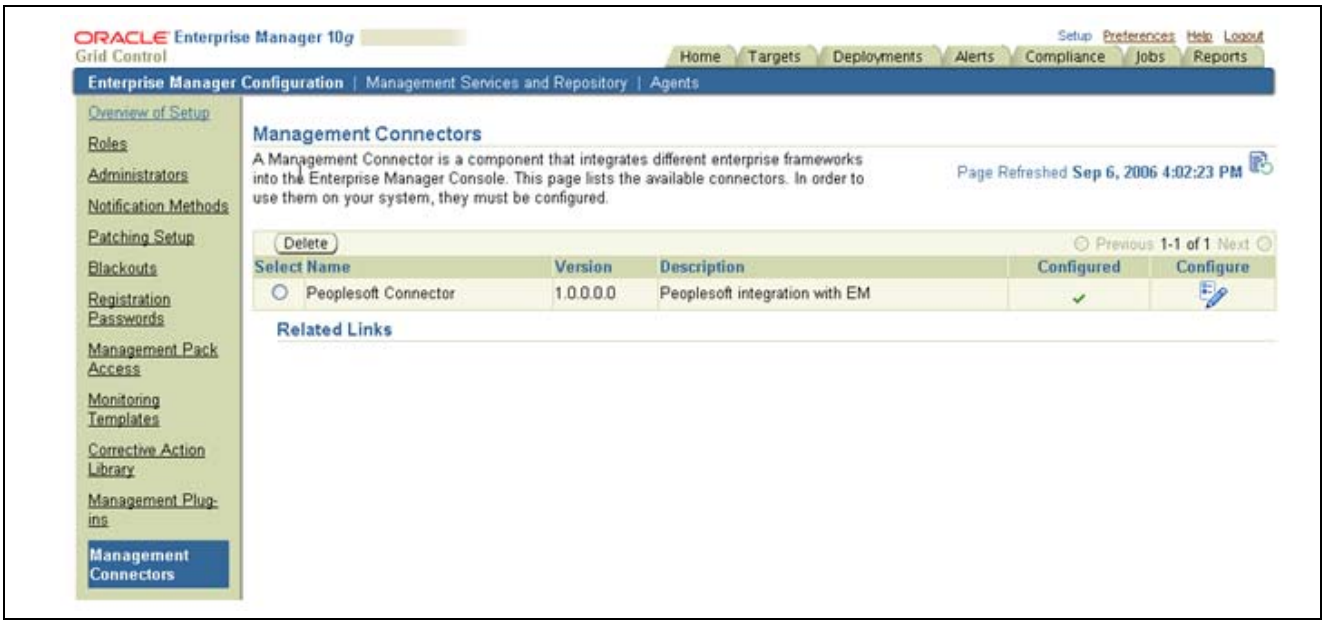
Task 10-4: Configuring the PeopleSoft Connector

After the PeopleSoft Connector is successfully deployed:

1. Click the EM Console URL and login to the Oracle EM console.
2. From the Oracle EM console, select Setup, Management Connectors, to access the Management Connectors page, as shown in the following example:



Oracle Enterprise Manager - Management Connectors page

3. On the Oracle EM Management Connections page, select the PeopleSoft Connector option, and then click the Configure button.

   The Oracle EM Configure Management Connector - PeopleSoft Connector: General page appears, as shown in the following example:

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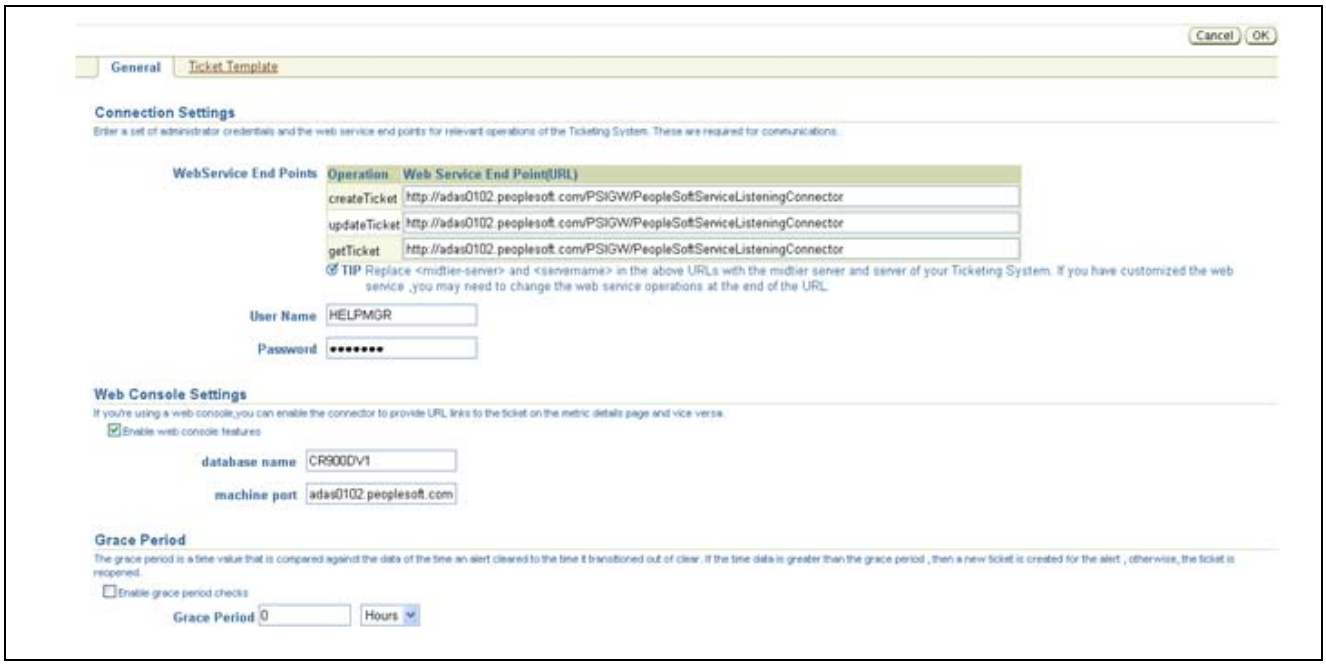

Oracle Enterprise Manager Configure Management Connector - PeopleSoft Connector: General page

4. Use the Oracle EM Configure Management Connector - PeopleSoft Connector General page to configure the PeopleSoft Connector:
   a. WebService End Points: Specify WebService End Points for createTicket, updateTicket, and getTicket web service operations.
   b. WebService Credentials: User ID and password to log in to the PeopleSoft CRM system for adding or updating a case.
   c. Web Console Settings: A URL that can transfer to the PeopleSoft CRM case from the Oracle EM system.

      This is used on the Oracle EM metric detail page to drill into the case.
   d. Grace Period: A time value that is compared against the data when an alert is cleared to the time when it has transitioned out of clear.

      If this span of time is greater than the grace period, a new ticket is created for the alert. Otherwise, the ticket is reopened. The idea is not to create the case for the same alert within a defined time period.
5. Click the Ticket Template tab to access the Oracle EM Configure Management Connector - PeopleSoft Connector: Ticket Template page, as shown in the following example:

Oracle Enterprise Manager Configure Management Connector - PeopleSoft Connector: Ticket Template page

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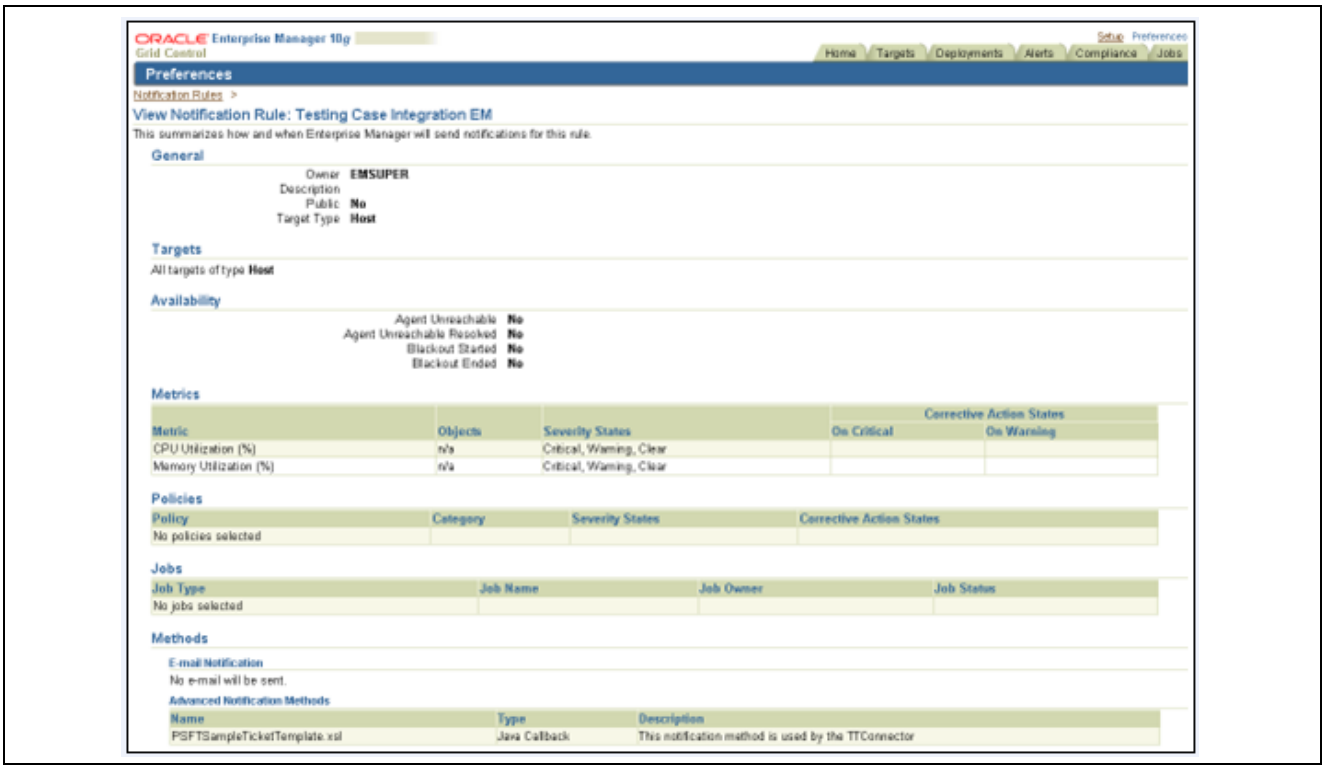
The Oracle EM Configure Management Connector - PeopleSoft Connector Ticket Template page lists all registered templates for the PeopleSoft Connector.

6. From the Oracle EM Configure Management Connector - PeopleSoft Connector Ticket Template page, select Preferences, Notification Rules.

   The Oracle Enterprise Manager - Notification Rules: View Notification page appears, as shown in the following example:



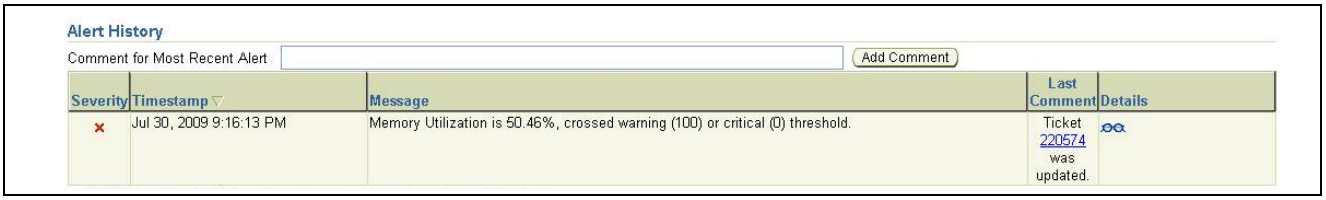
Oracle Enterprise Manager - Notification Rules: View Notification page

7. Set up your desired rules to use the registered template to create a case in the PeopleSoft HelpDesk system.

   After a case is created or updated, the user can drill into a case from the Oracle EM Metric Detail page.

   Your navigation to the Oracle EM Metric Detail page is dependent upon how you set up your alert.

   The following shows an example of the Alert History page:



Alert History page

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CHAPTER 11

Installing the PeopleSoft CRM 9.1 Portal Pack

This chapter discusses:

- Understanding PeopleSoft Portal Pack Installation
- Granting PeopleSoft Portal Pack Personalization
- Accessing PeopleSoft CRM Through the Applications Portal

Understanding PeopleSoft Portal Pack Installation

This chapter provides instructions for the installation and setup of the PeopleSoft CRM Portal Pack and related components.

If you use PeopleSoft CRM Portal Pack without the Applications Portal, you must enable users to personalize their Portal Pack homepage. If you have implemented the Applications Portal and want to access PeopleSoft CRM 9.1 from within the Applications Portal database, you must set up a link to PeopleSoft CRM 9.1 and enable Single Signon.

Note. All tasks in this chapter must be completed for both the System and Demo databases, unless otherwise indicated in the task.

Note. Before proceeding with the installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft PeopleTools Installation guide for your database platform and PeopleSoft PeopleTools 8.52 PeopleBooks.

Note. In addition, consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

Task 11-1: Granting PeopleSoft Portal Pack Personalization

This section discusses:

- Updating the Homepage Personalization Permissions
- Adding the Portal User Role to the User IDs

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Task 11-1-1: Updating the Homepage Personalization Permissions

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

To update the homepage Personalization Permission List:

1. Sign on with PeopleSoft Data Mover to the PeopleSoft CRM 9.1 database.
2. Open the PeopleSoft Data Mover script <*PS_APP_HOME*>\scripts\ PORTAL_HP_PERS.DMS.
3. Run this script against the PeopleSoft CRM 9.1 database.
4. Close PeopleSoft Data Mover.

Task 11-1-2: Adding the Portal User Role to the User IDs

To add the Portal User Role to the User IDs:

1. Sign on with PeopleSoft Data Mover to the PeopleSoft CRM 9.1 database.
2. Open the PeopleSoft Data Mover script <*PS_APP_HOME*>\scripts\PORTAL_ADD_ROLE.DMS.
3. Run this script against the PeopleSoft CRM 9.1 database.
4. Close PeopleSoft Data Mover.

Note. The PAPP_USER and PeopleSoft Guest role should be granted to all new User IDs for access to the Homepage personalization and left pane navigation menu. After running this script, manually remove the role PAPP_USER from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 11-2: Accessing PeopleSoft CRM Through the Applications Portal

The installation phase of your PeopleSoft application should only entail setting up a single link to the application content provider, PeopleSoft CRM 9.1.

Note. Perform this task only if you own the PeopleSoft Applications Portal product and want to access your application from within the PeopleSoft Applications Portal database.

To set up the link and the Single Signon, see the *PeopleSoft Applications Portal Solutions 8.9 Installation* document on My Oracle Support. See the table of contents for chapters about setting up Single Signon to your application database and accessing the PeopleSoft content providers.

See Portal Products 8.4 Installation Guide, My Oracle Support.

Note. When you begin your implementation phase, refer to the Applications Portal 8.4x - Implementing Navigation and Portal Packs document on My Oracle Support. This documentation discusses your options and how to handle the PeopleSoft content provider navigation and where to find all the necessary scripts, projects and documentation.

See Applications Portal 8.4x - Implementing Navigation and Portal Packs, My Oracle Support.

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CHAPTER 12

Installing the PeopleSoft Advanced Configurator 9.1

This chapter discusses:

- Understanding the PeopleSoft Advanced Configurator 9.1
- Reviewing the Installation Requirements
- Installing the Oracle WebLogic Application Server on Microsoft Windows
- Installing the PeopleSoft Advanced Configurator Server on Microsoft Windows
- Starting and Configuring the PeopleSoft Advanced Configurator Server on Microsoft Windows
- Installing the PeopleSoft Advanced Configurator on Sun Solaris
- Installing the Oracle WebLogic Application Server on Sun Solaris
- Installing the PeopleSoft Advanced Configurator Server on Sun Solaris
- Starting and Configuring the PeopleSoft Advanced Configurator Server on Sun Solaris
- Installing the PeopleSoft Visual Modeler
- Installing for Integration with PeopleSoft Order Capture
- Installing Multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows (Optional)

Understanding the PeopleSoft Advanced Configurator 9.1

This chapter provides instructions for the installation and set up of the PeopleSoft Advanced Configurator 9.1 Server and related components.

Note. Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft PeopleTools 8.52 Installation guide for your database platform and PeopleSoft PeopleTools 8.52 PeopleBooks.

Note. In addition, you should consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

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Note. Before you begin your installation of the PeopleSoft Advanced Configurator, consult the *PeopleSoft CRM 9.1 Hardware and Software Requirements Guide* available on My Oracle Support for the latest supported platform information.

See *PeopleSoft CRM 9.1 Hardware and Software Requirements, "Defining Advanced Configurator Requirements."*

Reviewing the Installation Requirements

This section discusses:

- Prerequisites
- Reviewing the PeopleSoft Advanced Configurator Installation Process
- Understanding PeopleSoft Visual Modeler and the PeopleSoft Advanced Configurator Server

Prerequisites

Before you begin the PeopleSoft Advanced Configurator installation, thoroughly review the PeopleSoft CRM 9.1 Hardware and Software Requirements guide, *Defining Advanced Configurator Requirements*, that describes the minimum hardware, software, database, and client browser requirements that your system must meet to install and run the PeopleSoft Advanced Configurator software. PeopleSoft Advanced Configurator supports only a portion of the operating systems, databases and web servers that PeopleSoft PeopleTools supports.

See *PeopleSoft CRM 9.1 Hardware and Software Requirements, "Defining Advanced Configurator Requirements."*

Note. The PeopleSoft Advanced Configurator supports only a subset of the operating systems, DataBases, WebServers, and so on that PeopleSoft PeopleTools supports.

Note. The PeopleSoft Advanced Configurator server should be installed on it's own, dedicated physical server and not one that is shared with PeopleSoft Pure Internet Architecture, PeopleSoft Integration Broker, or any PeopleSoft servers (for example, any PeopleSoft PeopleTools-based servers).

Reviewing the PeopleSoft Advanced Configurator Installation Process

The following are general steps intended for reference only. They summarize the procedures for properly installing PeopleSoft Advanced Configurator components. Each of these steps is described in greater detail in subsequent tasks in this chapter. This summary applies to the installation on either Microsoft Windows or Sun Solaris operating systems:

1. Install the Oracle WebLogic Server 10.3.1 (hereafter known as WebLogic Server 10.3).

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Note. The Java Development Kit (JDK) 1.6.0_11 is installed in the same subdirectory as WebLogic as part of the WebLogic 10.3.1 installation on Microsoft Windows and Sun Solaris. For example, you may have $BEA_HOME/weblogic103 and $BEA_HOME/jdk160_11. However, on IBM AIX you will need to separately download and install the appropriate JDK (SDK) from IBM. For the PeopleSoft Advanced Configurator installation to find the JDK (SDK), you will need to install it in the same subdirectory as WebLogic, or create a link in that subdirectory to the actual location. For example, from the command line in the BEA_HOME directory, execute ln -s /usr/java1.6.0_01 jdk160_11. The link needs to match the pattern jdk???_?? or jdk*. After JDK (SDK) is installed, you will need to modify the execution PATH environment variable to ensure that the directory containing the java executable is included in the path. This directory is usually the 'bin' directory of the JDK.

For IBM AIX installation instructions, use the Sun Solaris installation instructions.

2. Install and configure the appropriate database for your system platform type.
3. Install the PeopleSoft Advanced Configurator server.
4. Configure Oracle WebLogic Server 10.3.1 and the PeopleSoft Advanced Configurator Server.

   Restart the system if you are installing on a Microsoft Windows server.
5. If you are integrating with PeopleSoft Order Capture, perform the related setup at this stage.
6. Install PeopleSoft Visual Modeler.

Uninstalling PeopleSoft Advanced Configurator components from your system requires that you follow a specific order of removal:

1. Remove PeopleSoft Advanced Configurator PeopleSoft Visual Modeler, if it is installed on the same machine as the Server.
2. Remove PeopleSoft Advanced Configurator Server.
3. Remove Oracle WebLogic Server 10.3.1.

Understanding PeopleSoft Visual Modeler and the PeopleSoft Advanced Configurator Server

Depending on the phase of model development, PeopleSoft Visual Modeler can be run as a standalone application or in conjunction with the PeopleSoft Advanced Configurator Server. Thus, you can install them either on the same system or on different systems in a distributed network environment.

The PeopleSoft Advanced Configurator Server was designed with technology that supports configuration modeling and runtime configuration processing. The PeopleSoft Visual Modeler is a hierarchical modeling tool that is used for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.

The PeopleSoft Advanced Configurator Server uses a compiled version of a model defined with the PeopleSoft Visual Modeler. Configurations are created from user selections made against the model and the Configuration Server at runtime.

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Task 12-1: Installing the Oracle WebLogic Application Server on Microsoft Windows

This section discusses:

- Installing the Oracle WebLogic Server
- Running the Oracle WebLogic Server as a Service
- Changing the Oracle WebLogic Server System Password
- Uninstalling the Oracle WebLogic Server

Task 12-1-1: Installing the Oracle WebLogic Server

This section describes the installation process of the Oracle WebLogic Application Server. The Oracle WebLogic Server 10.3.1 software that is provided with this release includes and installs Sun JDK 1.6.0_11.

To install the Oracle WebLogic Application Server:

1. Log in as Microsoft Windows Server Administrator.
2. Insert the PeopleSoft CRM WebLogic CD-ROM and install the file `server103_win32.exe`.

   You can retrieve the PeopleSoft CRM WebLogic files from your E-Delivery download.
3. Select a location for the Oracle WebLogic Server.

   You should run PeopleSoft Advanced Configurator on a different instance of the Oracle WebLogic Server than other PeopleSoft applications. Thus, if the Oracle WebLogic Server 10.3.1 is already installed on this server, you should install another copy of the Oracle WebLogic Server to a different directory to accommodate PeopleSoft Advanced Configurator.
4. After you complete the installation, run Quick Start.

   The sample Oracle WebLogic application will be started at port 7001. You can access the sample application page with http://hostname:7001 on a web browser (where “hostname” is the name of your server).

Note. PeopleSoft PeopleTools and PeopleSoft Advanced Configurator Server must run on separate instances of the Oracle WebLogic Server 10.3.1. Multiple instances of the Oracle WebLogic Server can be run concurrently on the same server as long as they are all listening on different ports.

Task 12-1-2: Running the Oracle WebLogic Server as a Service

The PeopleSoft Advanced Configurator Server is not affected, whether or not you run the Oracle WebLogic Server 10.3.1 as a Microsoft Windows Service on your system. However, if you do run it as a service, you must stop the PeopleSoft Advanced Configurator Server in the Microsoft Windows Services window before you attempt to uninstall.

Important! Oracle recommends that you do *not* set up the Oracle WebLogic default Application Server (@port #7001) to run as a service. Instead, set up the PeopleSoft Advanced Configurator Server to run as a service.

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After you install the Oracle WebLogic Server 10.3.1, the directory locations are mapped to variables that are used by the PeopleSoft Advanced Configurator Server and PeopleSoft Visual Modeler. These directory locations are important to the proper installation and operation of the PeopleSoft Advanced Configurator Server.

Do *not* move the Oracle WebLogic Server 10.3.1 to another directory. If you must change the location, uninstall and then reinstall, rather than moving the Oracle WebLogic Server directories.

Task 12-1-3: Changing the Oracle WebLogic Server System Password

Oracle recommends that you install the PeopleSoft Advanced Configurator Server before you change the Oracle WebLogic Server password.

See "Installing the PeopleSoft Advanced Configurator Server."

Task 12-1-4: Uninstalling the Oracle WebLogic Server

To uninstall the Oracle WebLogic Server, use the uninstall utility that is provided:

1. Select Start, Programs, Oracle WebLogic, Uninstall Oracle WebLogic.
2. Uninstall Oracle WebLogic Server 10.3.1.

Task 12-2: Installing the PeopleSoft Advanced Configurator Server on Microsoft Windows

This section discusses:

- Installing the PeopleSoft Advanced Configurator Server
- Changing the Oracle WebLogic Server System Password
- Uninstalling the PeopleSoft Configuration Server

Task 12-2-1: Installing the PeopleSoft Advanced Configurator Server

This section describes how to install the PeopleSoft Advanced Configurator Server on a Microsoft (MS) Windows Server system.

The installation of PeopleSoft Advanced Configurator Server includes the optional creation of database tables as necessary. However, the database and connectivity must already exist. The database can be the PeopleSoft CRM database if you are installing PeopleSoft Advanced Configurator for use with other PeopleSoft CRM applications.

PeopleSoft Advanced Configurator Server installation allows you to specify the port number of the PeopleSoft CRM database if it is different from the default setting. Check with your database administrator (DBA) if you are not sure of the appropriate port setting.

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Note. Before proceeding with PeopleSoft Advanced Configurator server installation, install the custom PeopleSoft Advanced Configurator database or PeopleSoft CRM database. Ensure that the database has a user login with permission to create tables.

To install the PeopleSoft Advanced Configurator Server:

1. If you intend on using Microsoft SQL Server as a database server, then you should obtain the appropriate Microsoft JDBC driver (sqljdbc4.jar) from Microsoft's database installation software now.

   Copy the jar file to a directory that you will remember, for example C:\temp, as you will need this file later in the installation process.

2. If you have not already installed the Oracle WebLogic Server, do so now.

   See Installing the Oracle WebLogic Application Server.

   Note. If you are installing the PeopleSoft Advanced Configurator WebLogic Server in addition to an existing Oracle WebLogic Server that is used for another application, you must install it in a separate location. For example: \bea_cfg\ rather than the default \bea.

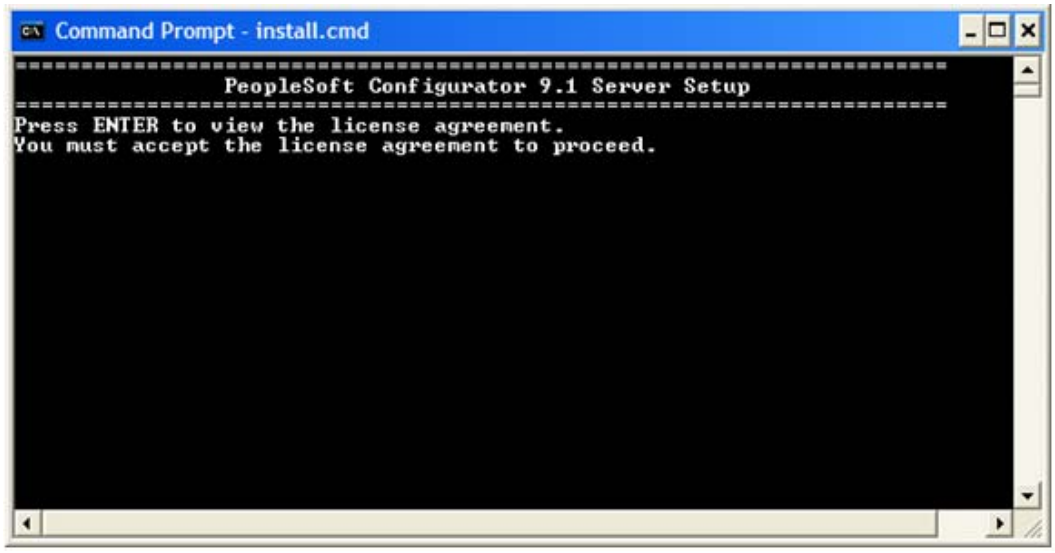
3. Open a command prompt and navigate to:

   <*PS_APP_HOME*>\setup\AdvancedConfigurator\Server\Windows

4. Enter this command:

   ```
   install.cmd
   ```

   The PeopleSoft Configurator Server Setup command window appears, as shown in the following example:



Command Window - PeopleSoft Configurator 9.1 Server Setup window

5. On your keyboard, press the Enter key to view the license agreement, as shown in the following example:

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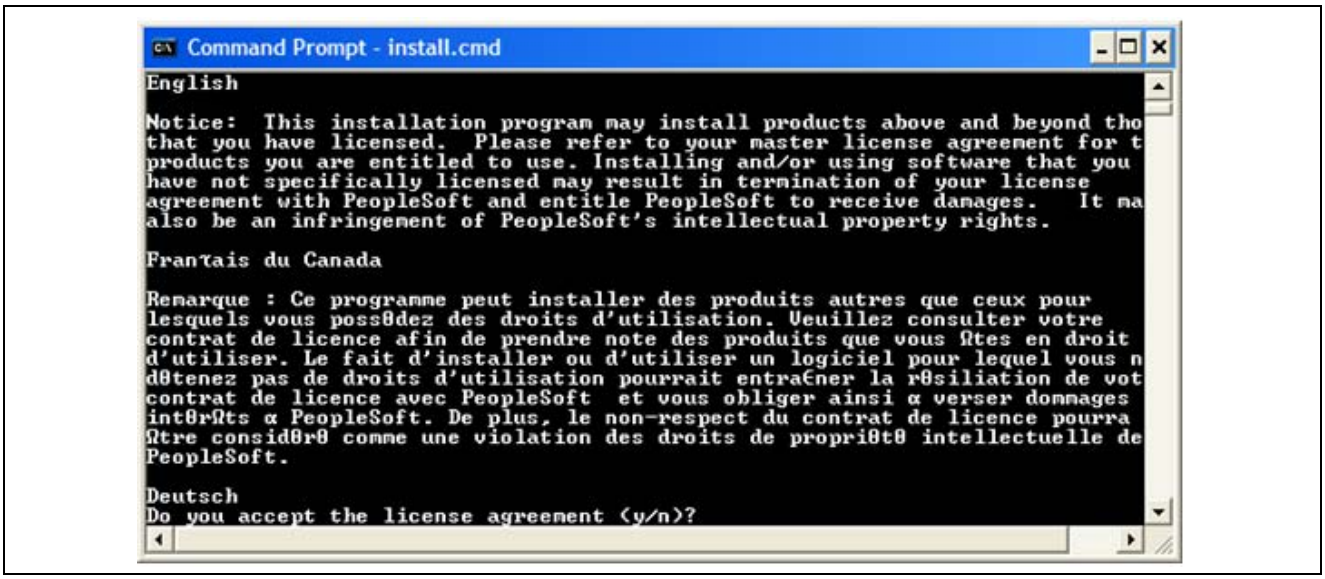
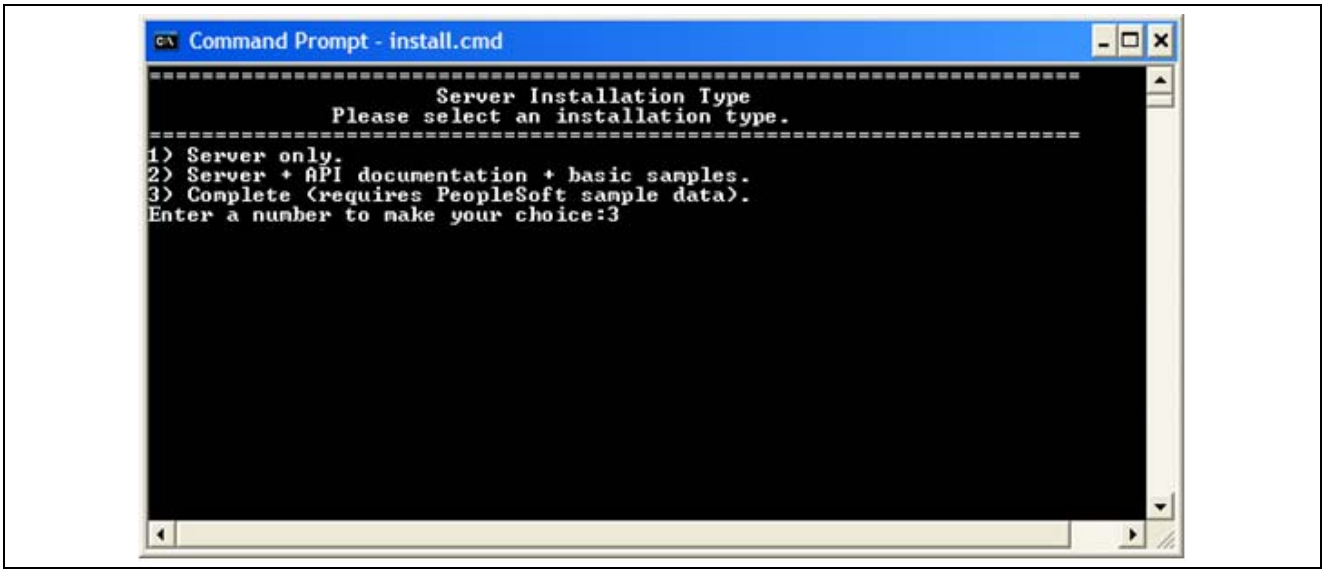


Command Window - PeopleSoft Configurator 9.1 License Agreement window

6. Enter *y* to accept the license agreement.

   The Server Installation Type window appears, as shown in the following example:



Command Window - Server Installation Type window

7. Select the option that allows the appropriate level of access to the PeopleSoft Advanced Configurator Server to anyone who uses the machine, or to anyone who uses the system ID that you used to log in.

   The Application Server Information window appears, as shown in the following example:

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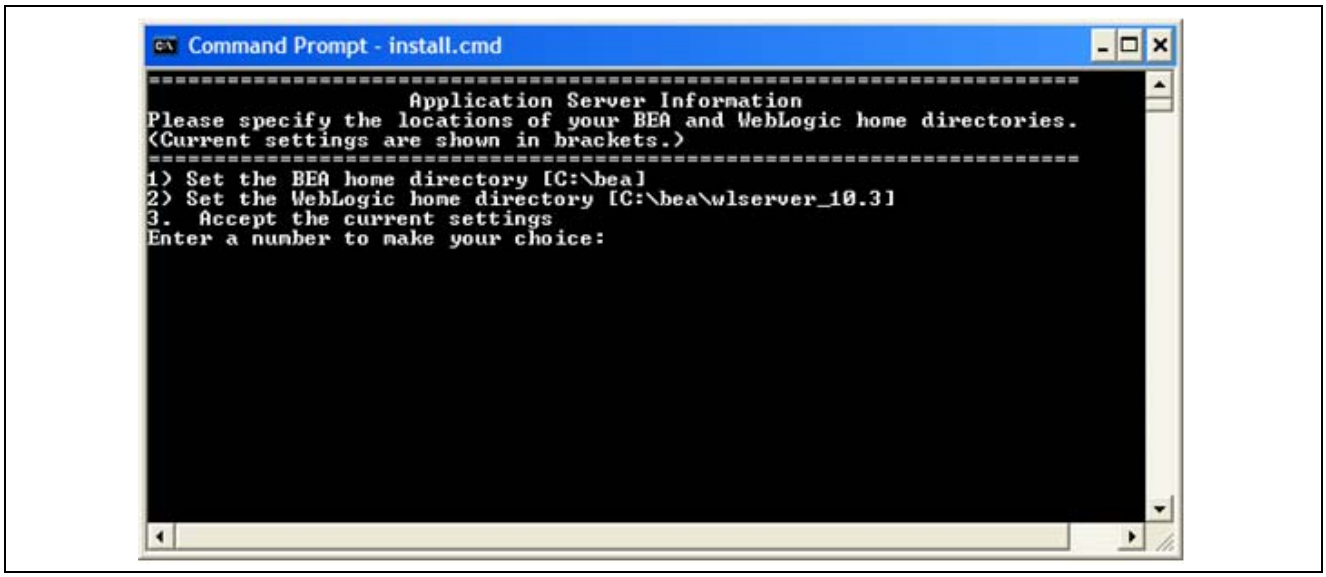


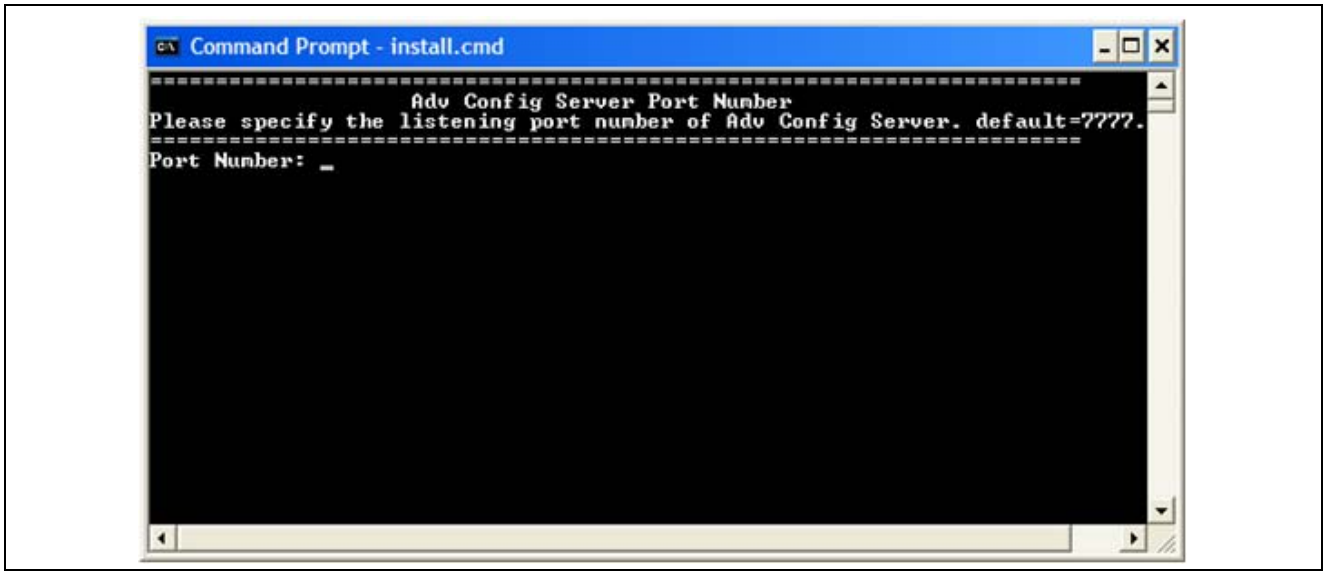
Command Window - Application Server Information window

8. The install program searches for the BEA home directory and fills in the found directory.

   If you are using another directory for the Oracle WebLogic 10.3.1 server, or if you are using an existing Oracle WebLogic 10.3.1 installation with another application, enter its location in this Application Server Information options window.

9. Accept the BEA home and Weblogic HOME settings.

   The Adv Config Server Port Number window appears, as shown in the following example:



Command Window - Adv Config Server Port Number window

10. Accept the default *7777* by pressing Enter, or enter your port number.

    The Configuration Database window appears, as shown in the following example:

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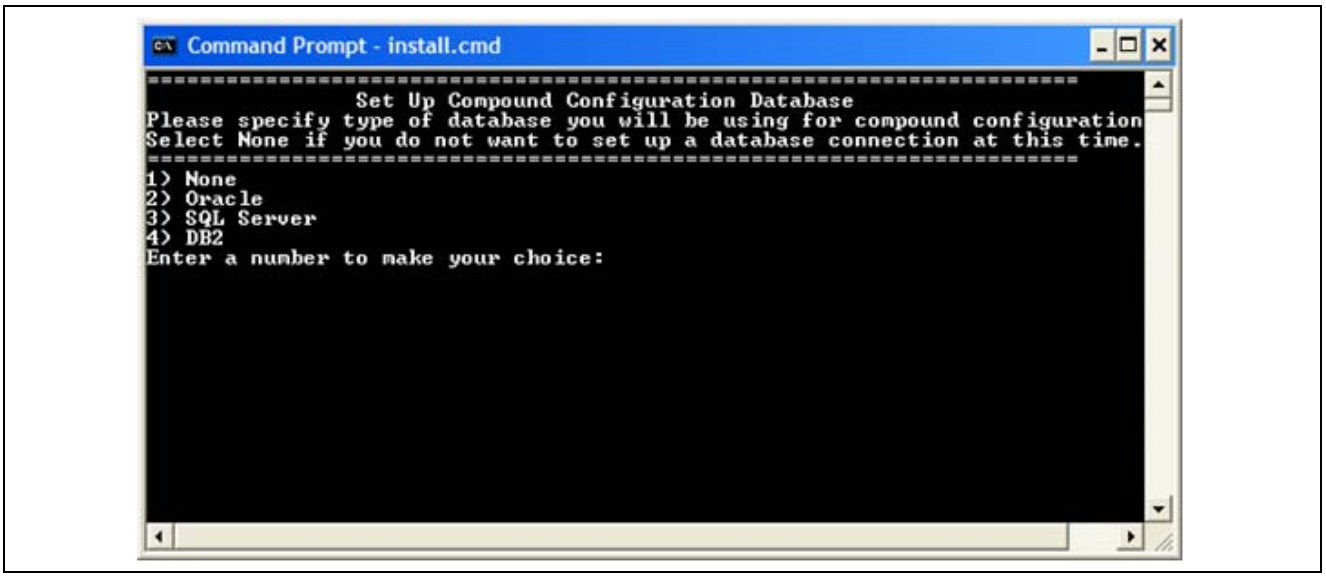
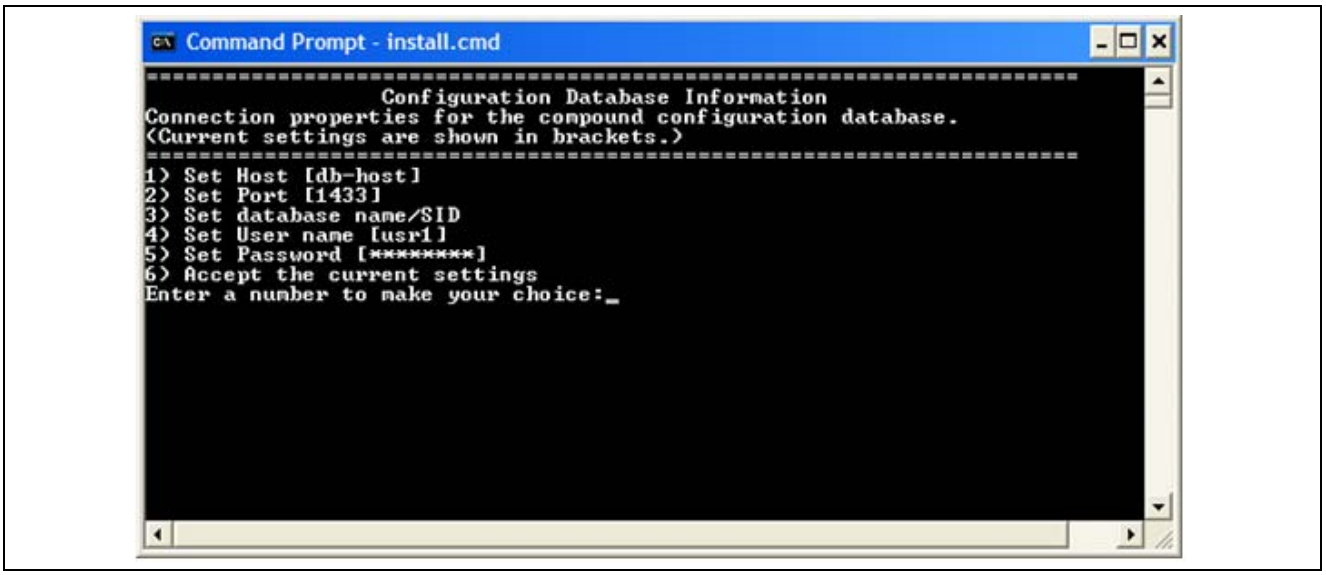


Command Window - Set Up Compound Configuration Database window

11. Select the database that you are running.

    The Configuration Database Information - Connection Properties option window appears, as shown in the following example:



Command Window - Configuration Database Information window

12. Enter the database information for the database that you intend to use for configuration and model data.

    For MSSQL only: If MSSQL is your database of choice, the install program will prompt for the location of the Microsoft jdbc driver file (sqljdbc4.jar) that you obtained earlier.

    The following example of the Configuration Database Information window shows the MSSQL directory prompt:

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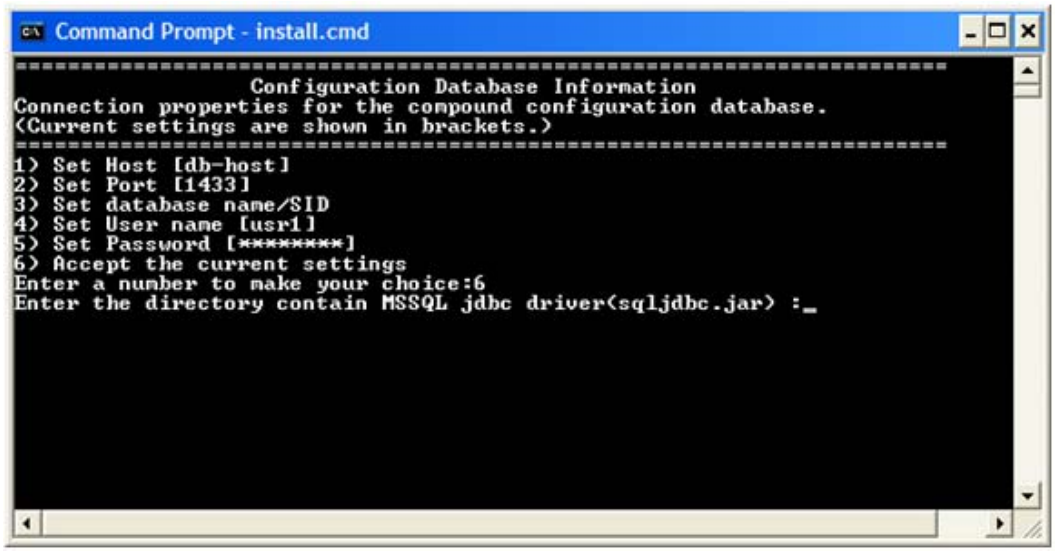
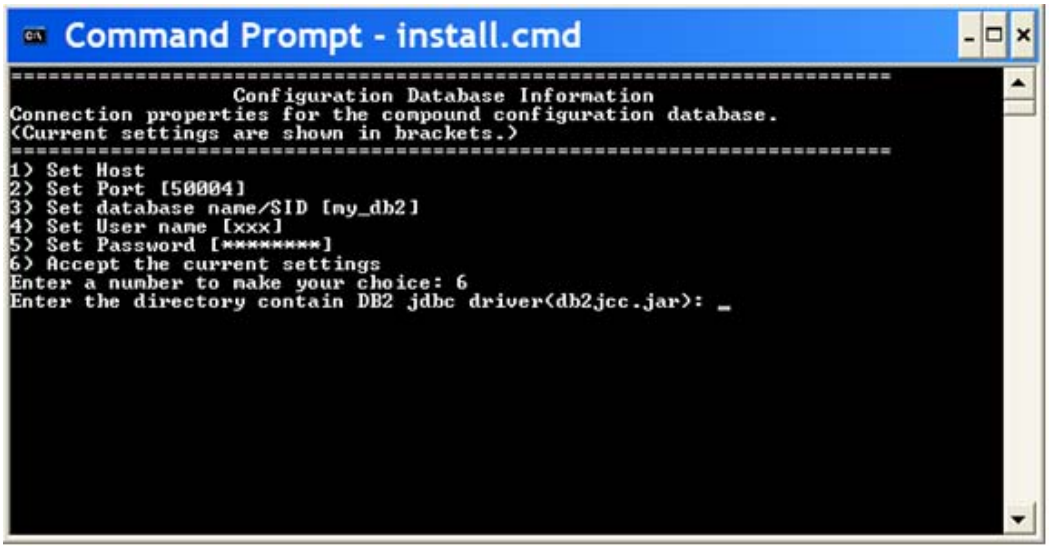


Command Window - Configuration Database Information window

For DB2 only: If DB2 is your database of choice, the install program will prompt for the location of the IBM DB2 jdbc driver file (db2jcc.jar).

The db2jcc.jar file is in the java directory (java 12 on some installs) under the DB2/LUW home directory.

For DB2 only - Command window prompts for the IBM DB2 jdbc driver file location, as shown in the following example:



For DB2 only - Command window prompts for the IBM DB2 jdbc driver file location

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

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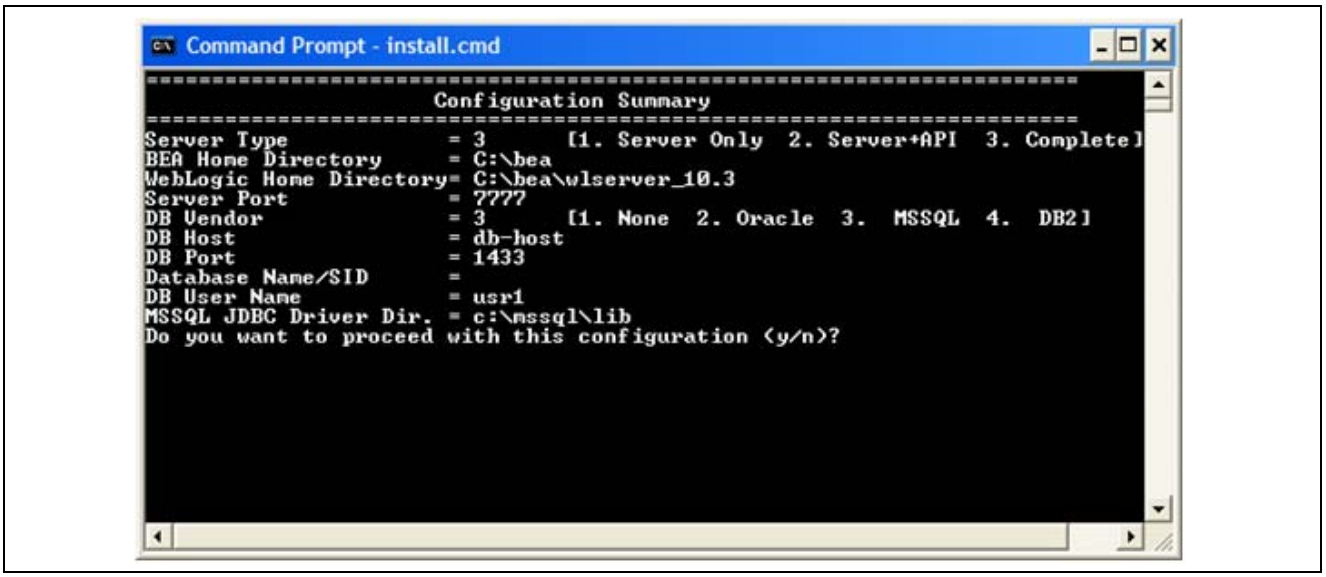

Command Window - Configuration Summary window and selections

13. Review the values. Enter *y* to complete the installation, or *n* to abort the installation.

    It is not necessary to restart the system when the installation is complete.

14. *For DB2 only:* After installation completes, you must double-click *propupdate.cmd* to reset the Adv Cfg (Advanced Configurator) tables:

    a. Navigate to <*WEBLOGIC_HOME*>*config\CalicoDomain\install directory*

    b. Edit the *install.properties* file as follows:

       Change the line `netadv.db.replace=false` to `netadv.db.replace=true`.

    c. Double-click the `propupdate.cmd` to reset the Adv Cfg (Advanced Configurator) tables.

The PeopleSoft Advanced Configurator Server installation creates the following directories:

- Directories and files found in:

  <*WEBLOGIC_HOME*>\config\CalicoDomain\applications\CalicoApp\Web-inf\:

  - config\
  - dtd\
  - lib\
  - logs\
  - models\
  - sql\
  - xsd\
  - web.xml
  - weblogic.xml

- Installation-specific files found in:

  <*WEBLOGIC_HOME*>\config\CalicoDomain\install\

  - install.jar

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- install.properties
- install.log
- propupdate.cmd

- The file install.log contains information about setup during installation (including error messages if any errors occurred).

  Your system administrator can use propupdate.cmd and install.properties to rerun setup to aid in future troubleshooting or information gathering.

- For database connection pooling purposes, the t3servername property has been added to the LEDBAcc.properties file.

  The t3servername property has a default value of *myserver* upon install. If the installation and reconfiguration of the Oracle WebLogic Server 10.3.1 is with a server name other than *myserver*, you must update the t3servername property in LEDBAcc.properties to reflect the actual server name.

  The LEDBAcc.properties file is in: <*WEBLOGIC_HOME*>\config\CalicoDomain\applications\CalicoApp\Web-inf\config.

After the PeopleSoft Advanced Configurator server installs, you can change the default Oracle WebLogic Server system password, as described in the next section.

Task 12-2-2: Changing the Oracle WebLogic Server System Password

To change the Oracle WebLogic Server system password:

1. Ensure that the PeopleSoft Advanced Configurator is running.

   Alternatively, open a command prompt and change the directory to: <*WEBLOGIC_HOME*>\config\CalicoDomain.

   Run *startConfigurator.cmd* with no parameters. The server should start.

2. Go to the Oracle WebLogic Server Management Console by entering this URL in a browser:

   http://<host_name>:7777/console

   Note. 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

3. Log in by entering *system* in the User ID field and <*initial password, weblogic*> in the Password field.
4. Select Domain Structure, Compatibility Security, Users, and then select the user *system.*
5. Enter the new password for user *system.*
   - For Old Password, enter *weblogic.*
   - For New Password, enter <*new password*>.
   - For Confirm New Password, enter <*new password*>.
6. Click Save.
7. Stop the PeopleSoft Advanced Configurator Server by running `stopConfigurator.cmd` from the server prompt.
8. Locate startConfigurator.cmd and stopConfigurator.cmd in <*WEBLOGIC_HOME*>\config\CalicoDomain and change set WLS_PW=weblogic to set WLS_PW=<the new password>

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9. If you configured the PeopleSoft Advanced Configurator Server as a service, because you changed startConfigurator.cmd, you must re-register the service.

   Execute the following commands from the directory where startConfigurator.cmd resides:

   ```
   startConfigurator.cmd remservice
   startConfigurator.cmd cfgservice
   ```

10. Check for the existence of boot.properties. By default, this resides in C:\<*WEBLOGIC_HOME*>\config \CalicoDomain\servers\myserver\security. If the file is present, replace the password value with the unencrypted new password. Note that the password encryptes upon restart of the server.
11. Restart the service from the Control Panel or reboot the system.

Task 12-2-3: Uninstalling the PeopleSoft Configuration Server

Before you uninstall the PeopleSoft Advanced Configurator Server, you must uninstall PeopleSoft Visual Modeler, if it is present on the server. Use the Control Panel Add/Remove utility to uninstall PeopleSoft Visual Modeler.

To uninstall the PeopleSoft Configuration Server:

1. Stop the PeopleSoft Advanced Configuration Server.
2. Remove the <*WEBLOGIC_HOME*>*config**CalicoDomain* directory.

Task 12-3: Starting and Configuring the PeopleSoft Advanced Configurator Server on Microsoft Windows

This section discusses:

- Understanding How to Start the PeopleSoft Advanced Configurator Server on Microsoft Windows
- Starting the PeopleSoft Advanced Configurator from a Microsoft Command Window
- Installing the PeopleSoft Advanced Configurator as a Microsoft Window Service
- Starting the PeopleSoft Advanced Configurator as a Microsoft Window Service
- Resetting the Port
- Setting the XML Encoding Option (Optional)

Understanding How to Start the PeopleSoft Advanced Configurator Server on Microsoft Windows

After you install both the Oracle WebLogic Application Server and the PeopleSoft Advanced Configurator Server, you need to start the PeopleSoft Advanced Configurator Server. Starting the PeopleSoft Advanced Configurator Server properly sets up the necessary system environment variables for the JDK/JRE, Oracle WebLogic 10.3, and the PeopleSoft Advanced Configurator Server.

You can start the PeopleSoft Advanced Configurator Server in one of two ways:

- Run the *startConfigurator.cmd* file within a DOS command prompt from Microsoft Windows.

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- If the server is running as a Microsoft Windows service, use the Services utility.

Task 12-3-1: Starting the PeopleSoft Advanced Configurator from a Microsoft Command Window

After you install both the Oracle WebLogic Server and the PeopleSoft Advanced Configurator, you can start the Configuration Server from a DOS Command Window.

1. Open a command prompt window.
2. At the prompt, change the directory to C:\<*WEBLOGIC_HOME*>*config**CalicoDomain*.
3. Run *startConfigurator.cmd* with no parameter, The Configuration Server will start.

Task 12-3-2: Installing the PeopleSoft Advanced Configurator as a Microsoft Window Service

After you install both the Oracle WebLogic Server and the PeopleSoft Advanced Configurator Server, you can also set up the PeopleSoft Advanced Configurator Server to run as a service.

To set up the PeopleSoft Advanced Configurator Server to run as a service:

1. Open a command prompt window.
2. At the prompt, change the directory to <*WEBLOGIC_HOME*>*config**CalicoDomain*. This is the Oracle WebLogic Server directory that contains *startConfigurator.cmd*.
3. Run the *startConfigurator cfgservice* to install the PeopleSoft Adavnced Configurator as a Microsoft Window service.
4. Select Start, Settings, Control Panel, Administrative Tools, Services.

   You will see that a new service, PeopleSoft Configurator Server, is installed.

Task 12-3-3: Starting the PeopleSoft Advanced Configurator as a Microsoft Window Service

To run the PeopleSoft Advanced Configurator as a service:

1. To start the service, either reboot the server (the service is set to automatic), or use the Control Panel utility.
2. Select Start, Settings, Control Panel, Administrative Tools, Services.
3. Look for PeopleSoft Configurator Server in the list of services for the system.
4. Select start service for PeopleSoft Configurator Server.

Note. To remove the service, run: `c:\<WEBLOGIC_HOME>\config\CalicoDomain \startConfigurator remservice`

Task 12-3-4: Resetting the Port

You can specify the port number when installing the PeopleSoft Advanced Configuration Server. After the installation, you can change the port number using the Administration Console.

To change the server port:

1. Open the Oracle WebLogic Server administration console for the Calico Domain:

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http://<host_name>:7777/console

Note. 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

Log in with the user name and password.

2. Select Environment, Servers, MyServer.
3. On the Configuration page, General sub-tab, enter a new value for Listen Port.
4. Click Save.
5. Restart the PeopleSoft Advanced Configurator Server.

Task 12-3-5: Setting the XML Encoding Option (Optional)

This task is optional. Product configuration data that is created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter to the web.xml file.

Note. Oracle recommends using the default UTF-8, or changing the encoding to specify Internet Assigned Numbers Authority (IANA) encoding name.

To change XML output encoding:

1. Open the file web.xml file for editing in:

   C:\<WEBLOGIC_HOME>\config\CalicoDomain\applications\CalicoApp\Web-inf

2. Find the following lines in the XML file:

```
<servlet>
<servlet-name>copxml</servlet-name>
<servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet
/servlet-class>
```

3. Create a new sub-element of the <servlet> element called <init-param>.

   Other sub-elements called <init-param> may already exist; do not modify them. Input the encoding you want in the param-value element; Shift-JIS is used here as an example.

```
<init-param>
      <param-name>encoding</param-name>
      <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the PeopleSoft Advanced Configurator Server.

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Task 12-4: Installing the PeopleSoft Advanced Configurator on Sun Solaris

This section discusses:

- Understanding the PeopleSoft Advanced Configurator Installation
- Setting Up the Database

Understanding the PeopleSoft Advanced Configurator Installation

This task provides reference information that is useful before you install this release of the PeopleSoft Advanced Configurator Server.

For information on the minimum hardware, software, database, and client browser requirements that your system requires to install this release on a Sun Solaris system, refer to the PeopleSoft CRM Hardware and Software Requirements guide.

See *PeopleSoft CRM 9.1 Hardware and Software Requirements Guide.*

Note. Oracle's product load order requires that the Oracle WebLogic Server 10.3.1 and the PeopleSoft Advanced Configurator Server are loaded before you apply any further Oracle WebLogic Server Service Packs. The PeopleSoft Advanced Configurator Server may not work or even install properly if you do not follow this load order.

Task 12-4-1: Setting Up the Database

If you plan to develop or deploy a compound model, set up the database for that before you install the PeopleSoft Advanced Configurator Server. However, if you only need a database for external model data, you can set it up later.

Note. PeopleSoft Advanced Configurator supports the UNICODE character set by default. See the task *Setting the XML Encoding Option* for information on how to specify other character sets.

The database configuration information in this section is general and assumes that you have already identified the type of database configuration that you need. If not, you must contact your DBA for more information before installing and configuring your Oracle database and before installing the PeopleSoft Advanced Configurator Server.

Note. This guide is not intended to replace the knowledge or assistance of an experienced Oracle DBA.

Database Server Requirements

The database server can be a different system than the one where the PeopleSoft Advanced Configurator Server components are installed.

The database server that you use with the PeopleSoft Advanced Configurator Server must meet the following requirements:

- Allow the database user account to make a minimum of *100* concurrent connections to the system.
- Support *50* dedicated concurrent connections.

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- Set the value for the maximum number of extents for rollback segments to support *150* or more.

Database Configuration Requirements

You must create a user account specifically for the PeopleSoft Advanced Configurator Server and the tablespace must be the default location for this user account. The system identifier (SID) for the database account must have the necessary read-write permissions to create and drop tables or indexes and to insert, select, delete, or update any table in the dedicated tablespace.

Make a note of the tablespace, user ID (the Connect ID for PeopleSoft CRM applications) and password. You will need to refer to them during the PeopleSoft Advanced Configurator Server installation.

Task 12-5: Installing the Oracle WebLogic Application Server on Sun Solaris

This section discusses:

- Installing the Oracle WebLogic Application Server 10.3.1
- Uninstalling the Oracle WebLogic Server

Task 12-5-1: Installing the Oracle WebLogic Application Server 10.3.1

To install the Oracle WebLogic Server 10.3.1 on Sun Solaris:

1. Ensure that you have created an Oracle WebLogic Server user account (the default user is *weblogic*), and verify that you can log on as the Oracle WebLogic Server user, before you attempt to install Oracle WebLogic Server 10.3.1.
2. Ensure that you have created a group for the Oracle WebLogic Server user (the default group is *weblogic*) and set permissions for that group.

   Note. Record the user name and group permissions that you use during setup. You may need to refer to them when you install the PeopleSoft Advanced Configurator Server.

3. Change directory to the AppSrvr/Solaris directory on the temp directory created in the task *Installing the PeopleSoft Advanced Configurator Server.*
4. Execute *one* of the following:
   - $ ./server103_solaris32.bin (for GUI mode install)
   - $ ./server103_solaris32.bin-mode=console (for console mode install)

After you install the Oracle WebLogic Server 10.3.1 for the PeopleSoft Advanced Configurator Server on your system, all of their directory locations are mapped to variables that are used by the PeopleSoft Advanced Configurator Server. These directory locations are important for proper installation and operation of the PeopleSoft Advanced Configurator Server.

After the PeopleSoft Advanced Configurator Server is up and running, do *not* move Sun JDK, JRE, or the Oracle WebLogic Server files to another directory location. If you do, you must reinstall the PeopleSoft Advanced Configurator Server.

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Task 12-5-2: Uninstalling the Oracle WebLogic Server

To uninstall the Oracle WebLogic Server, do *one* of the following:

- Remove the entire bea directory, if Oracle WebLogic is the only Oracle/BEA product that you have installed:

  ```
  rm -r $HOME/bea
  ```

- Use the Oracle WebLogic Server uninstall utility that is provided.

Task 12-6: Installing the PeopleSoft Advanced Configurator Server on Sun Solaris

This section discusses:

- Understanding the PeopleSoft Configurator Server Installation on Sun Solaris
- Installing the PeopleSoft Configurator Server on Sun Solaris
- Changing the Oracle WebLogic Server System Password
- Uninstalling the PeopleSoft Advanced Configurator Server

Understanding the PeopleSoft Configurator Server Installation on Sun Solaris

This section describes the process for installing the PeopleSoft Advanced Configurator Server on a Sun Solaris system.

The installation of the PeopleSoft Advanced Configurator Server includes the optional creation of database tables. However, the database and connectivity must already exist. The database can be the PeopleSoft CRM database if you are installing with other PeopleSoft CRM applications.

The PeopleSoft Advanced Configurator Server installation allows you to specify the port number of the PeopleSoft Advanced Configurator database if it is different from the default setting. Check with your DBA if you are not sure of the appropriate port setting.

Note. Before proceeding with PeopleSoft Advanced Configurator Server installation, install the custom PeopleSoft Advanced Configurator database or PeopleSoft CRM database. Ensure that the database has a user login with permission to create tables.

Task 12-6-1: Installing the PeopleSoft Configurator Server on Sun Solaris

To install the PeopleSoft Advanced Configurator server on Sun Solaris:

1. If you intend on using Microsoft SQL Server as a database server then you should obtain the appropriate Microsoft JDBC driver (sqljdbc4.jar) from Microsoft's database installation software now. Copy the jar file to a directory that you will remember, for example /temp, as you will need this file later in the installation process.

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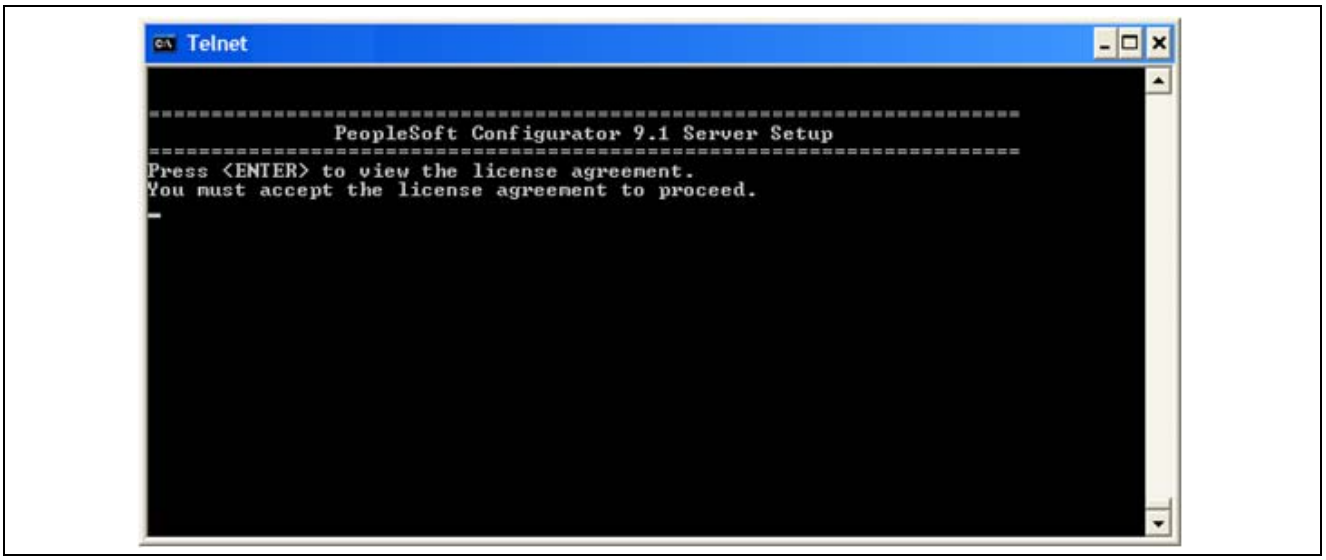
2. If the Oracle WebLogic Server 10.3.1 is not yet installed on the system, do so now before proceeding, see the task *Installing the Oracle WebLogic Application Server on Sun Solaris*, that appeared earlier in this chapter.

   See "Installing the PeopleSoft Advanced Configurator 9.1," Installing the Oracle WebLogic Application Server on Sun Solaris 9.

   Warning! Do *not* install the PeopleSoft Advanced Configurator Server into the PeopleSoft PeopleTools Oracle WebLogic Application Server.

3. Navigate to <PS_HOME>/setup/AdvancedConfigurator/Server/Solaris to run the Configurator server script, install.sh.
4. Enter the command: `install.sh`

   The PeopleSoft Configurator Server Setup window appears, as shown in the following example:



PeopleSoft Configurator 9.1 Server Setup window

5. On your keyboard, press the Enter key to view the license agreement.
6. Enter *y* to accept the license agreement.

   The Server Installation Type window appears, as shown in the following example:

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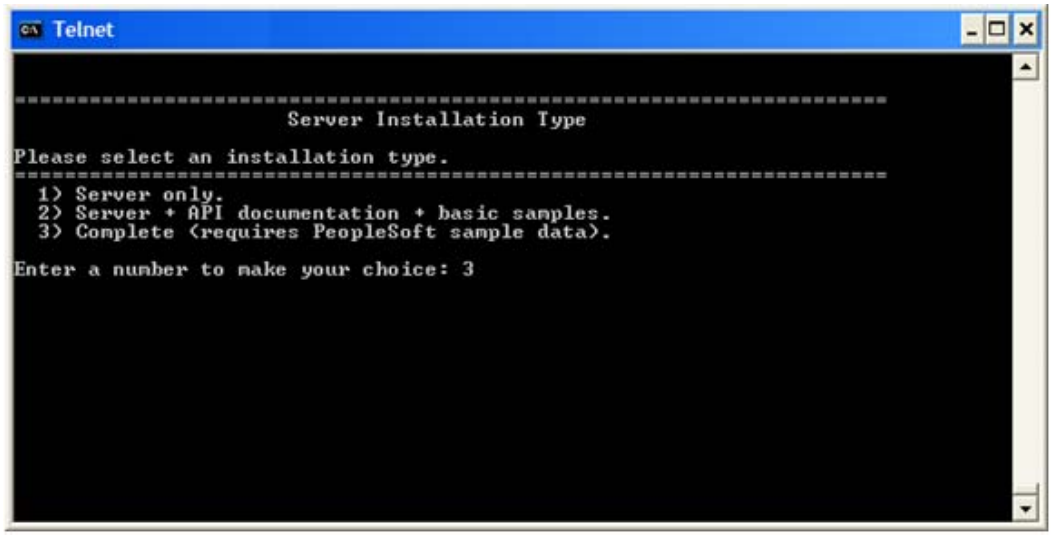
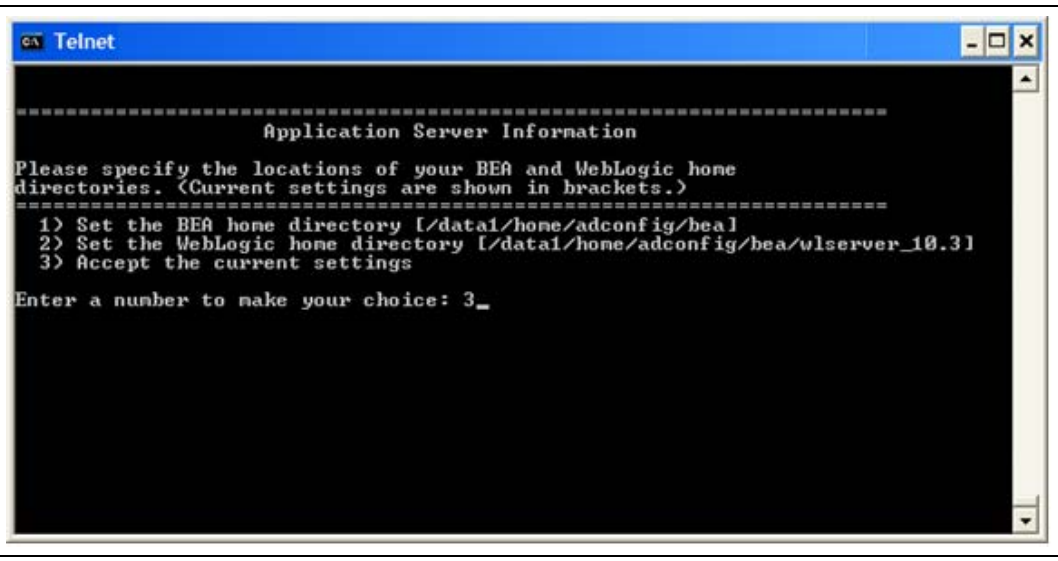


Server Installation Type option window

7. Select the option that allows the appropriate level of access to the PeopleSoft Advanced Configurator Server to anyone who uses the machine, or to anyone who uses the system ID that you used to log in.

   The Application Server Information window appears, as shown in the following example:



Application Server Information - Home directory option window

8. The install program searches for the BEA home directory and fills in the found directory.

   If you are using another directory for the Oracle WebLogic 10.3.1 Server, or if you are using an existing Oracle WebLogic 10.3.1 installation with another application, enter the location in this Application Server Information options window.

9. Accept the BEA home and Weblogic HOME settings.

   The Adv Config Server Port Number window appears, as shown in the following example:

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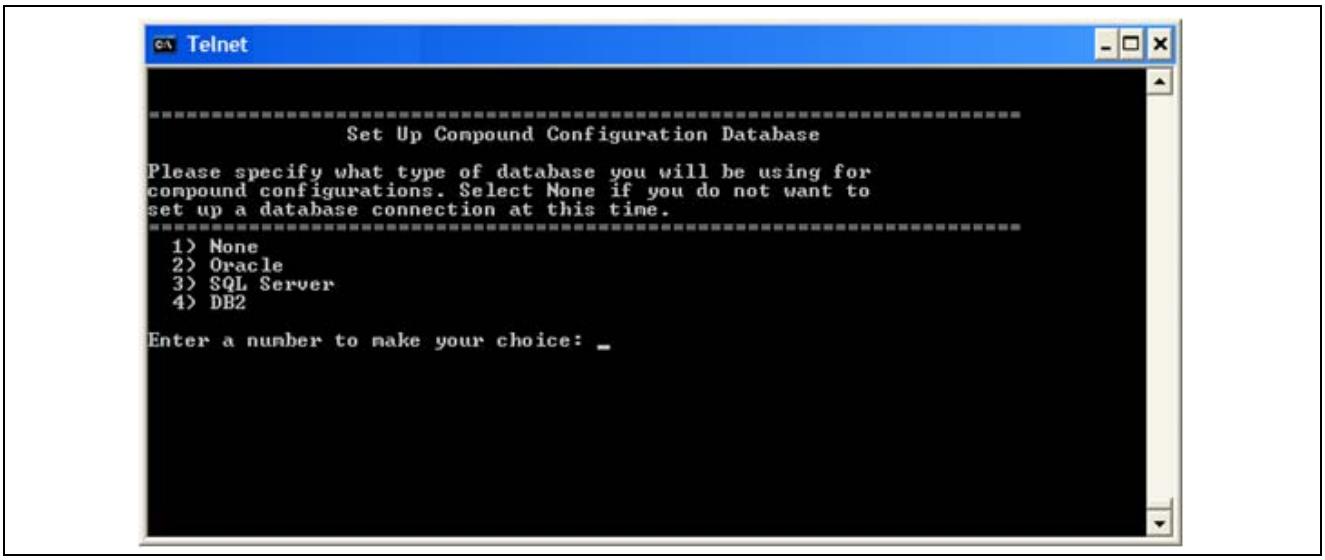
Adv Config Server Port Number entry window

10. Accept the default *7777* by pressing Enter, or enter your port number.

    The Set Up Compound Configuration Database - Database Type option window appears, as shown in the following example:



Set Up Compound Configuration Database - Database Type option window

11. Select the database that you are running.

    The Configuration Database Information - Connection Properties option window appears, as shown in the following example:

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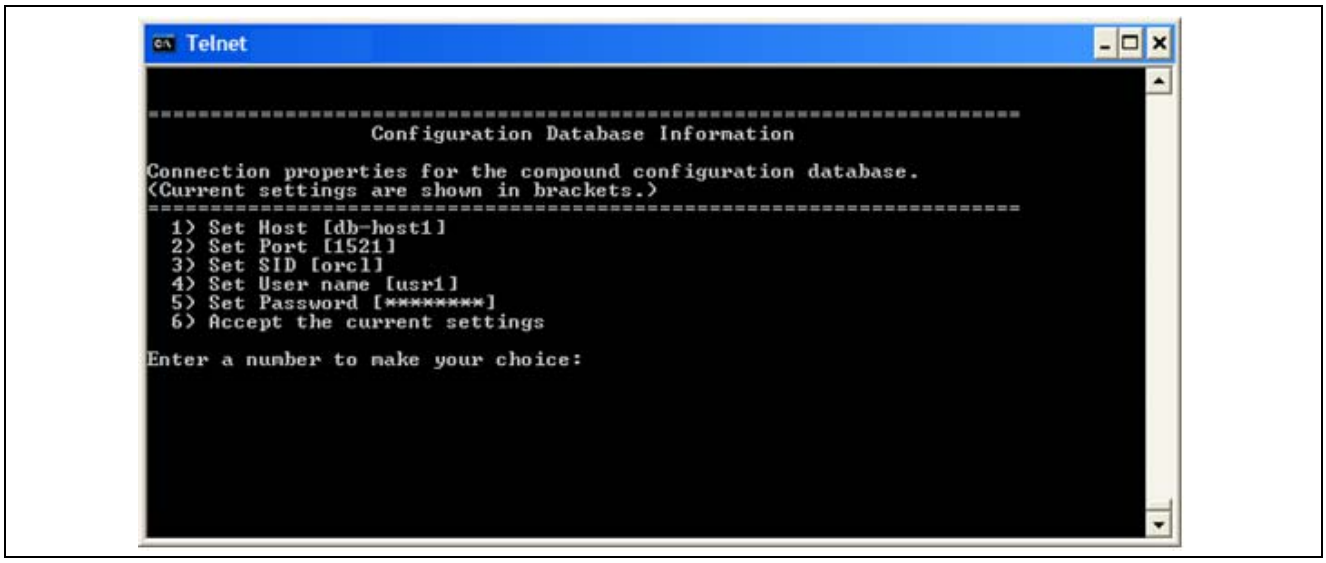
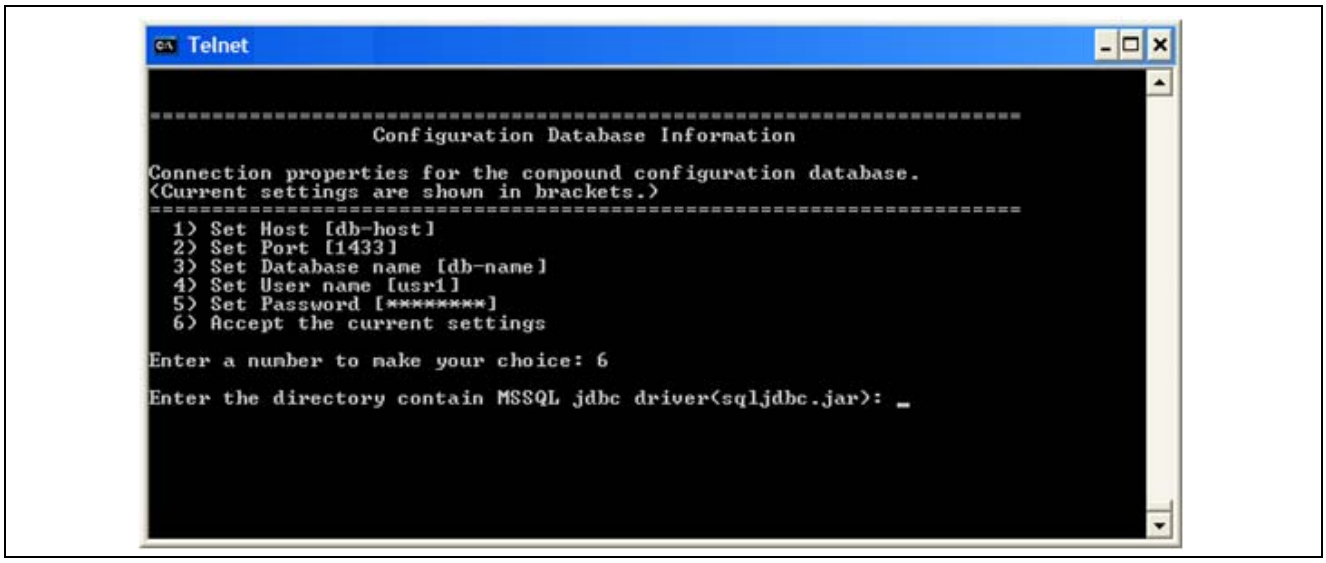


Configuration Database Information - Connection Properties option window

12. Enter the database information for the database that you intend to use for configuration and model data.

    For MSSQL only: If MSSQL is your database of choice, the install program will prompt for the location of the Microsoft jdbc driver file (sqljdbc4.jar) that you obtained earlier.

    The following example of the Configuration Database Information window shows the MSSQL directory prompt:



Configuration Database Information window showing the MSSQL directory prompt

    For DB2 only: If DB2 is your database of choice, the install program will prompt for the location of the IBM DB2 jdbc driver file (db2jcc.jar).

    The db2jcc.jar file is in the java directory (java12 on some installs) under the DB2/LUW home directory.

    For DB2 Only - JDBC driver prompt for DB2, a shown in the following example:

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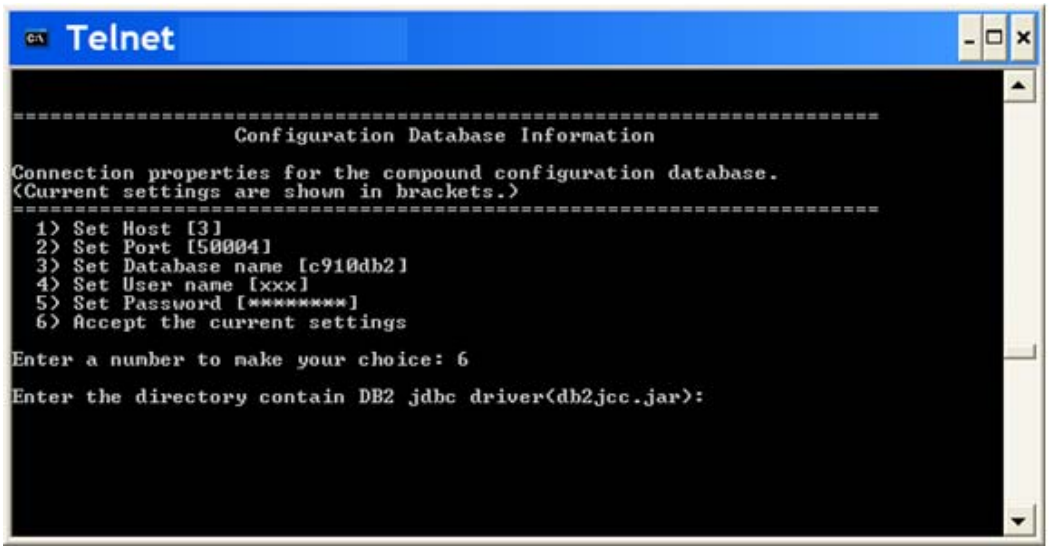
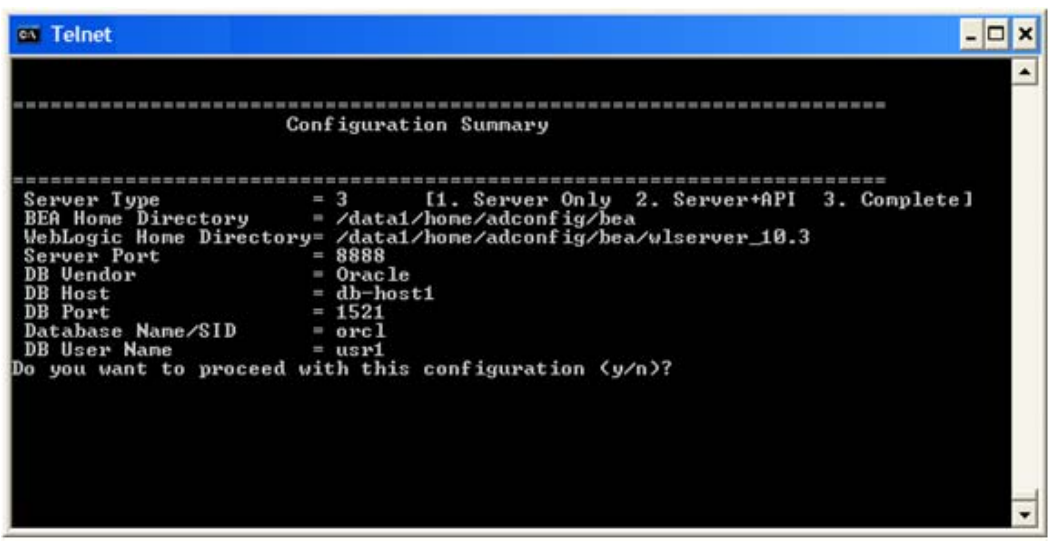


For DB2 Only - JDBC driver prompt for DB2

The Configuration Summary window appears, as shown in the following example:



Configuration Summary window

The following is an example of the MSSQL Configuration Summary window:

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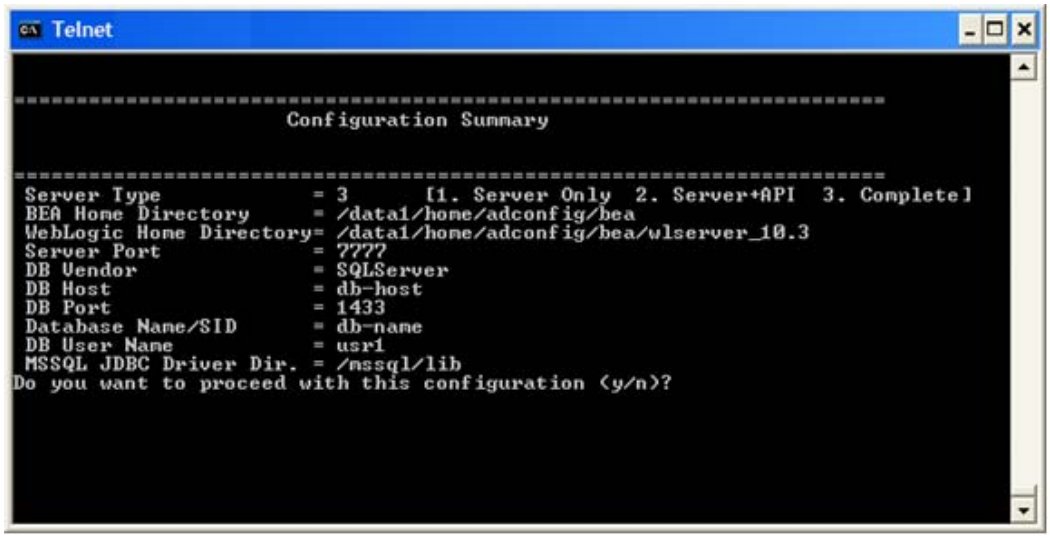
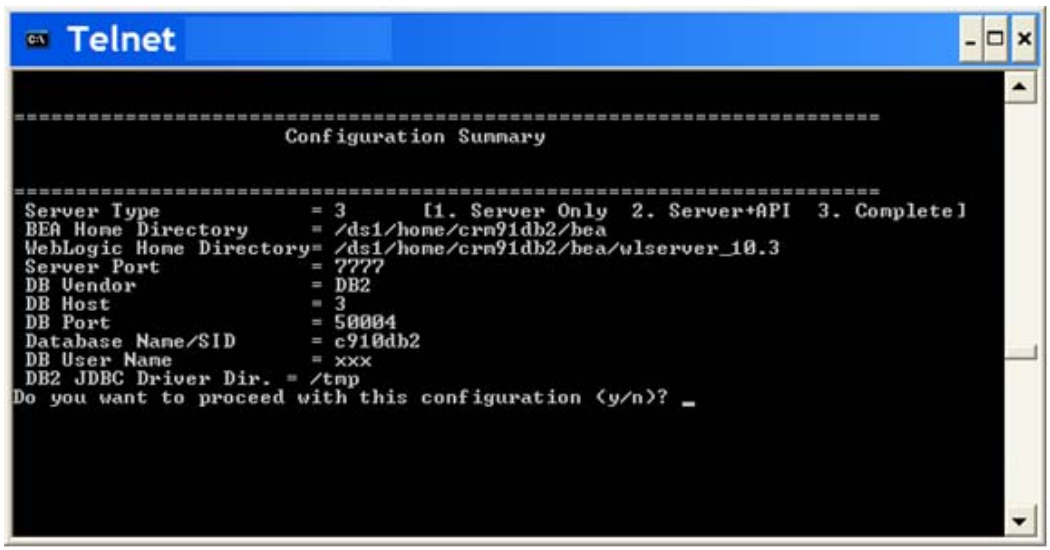


Example of the MSSQL Configuration Summary window

For DB2 Only - DB2 Summary page, as shown in the following example:



For DB2 Only - DB2 Summary page

Note. In this release, Oracle WebLogic 10.3.1 installs JDK 1.6.0_11 in its directory structure. The default path to the JDK is: */$HOME/bea/jdk160_11*

13. Review the values. Enter *y* to complete the installation, or *n* to abort the installation.

    It is not necessary to restart the system when the installation is complete.

14. *For DB2 only:* After installation completes, you must:

    a. Navigate to *<WEBLOGIC_HOME>/config/CalicoDomain/install directory.*

    b. Edit the install.properties file as follows:

    Change the line `netadv.db.replace=false` to `netadv.db.replace=true`.

    c. Run `propupdate.sh` to reset the Adv Cfg (Advanced Configurator) tables.

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10 directories and 2 files are found in: <*WEBLOGIC_HOME*>\config\CalicoDomain\applications\CalicoApp \Web-inf\

- config/
- dtd/
- lib/
- logs/
- models/
- namodels/
- nastructures/
- sql/
- structures/
- xsd/
- web.xml
- weblogic.xml

Task 12-6-2: Changing the Oracle WebLogic Server System Password

Oracle recommends that you change the Oracle WebLogic Server system password for production systems.

To change the default Oracle WebLogic Server system password:

1. Enter the following URL in a browser to open the Oracle WebLogic Server Management Console:

   http://<host_name>:7777/console

   Note. 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

2. Log in by entering *system* in the User ID field and <*old WebLogic password*> in the Password field.
3. Select Domain Structure, Compatibility Security, Users, and then select user *system*.
4. Enter the new password for user *system.*
   - For Old Password, enter <*old WebLogic system password*> (*weblogic* by default).
   - For Confim New Password, enter <*new WebLogic system password*>.
5. Click Save.
6. Stop the server.
7. Check for the existence of boot.properties.

   By default, this resides in <*WEBLOGIC_HOME*>/config/CalicoDomain. If the file is present, replace the password value with the unencrypted new password. Note that the password encrypts upon start up of the server.
8. In *startConfigurator.sh* and *stopConfigurator.sh*, change WLS_PW=<*old WebLogic password*> to WLS_PW=<*new password*>.
9. Restart the Configurator server.

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Task 12-6-3: Uninstalling the PeopleSoft Advanced Configurator Server

To uninstall the PeopleSoft Advanced Configurator Server:

1. Stop the PeopleSoft Advanced Configurator server.
2. Remove the <*WEBLOGIC_HOME*>/config/CalicoDomain directory.

Task 12-7: Starting and Configuring the PeopleSoft Advanced Configurator Server on Sun Solaris

This section discusses:

- Understanding the PeopleSoft Advanced Configurator Server Initiation on Sun Solaris
- Starting PeopleSoft Advanced Configurator Server from the Command Line
- Stopping the PeopleSoft Advanced Configurator Server from the Command Line
- Automatically Starting the PeopleSoft Advanced Configurator Server
- Resetting the Port
- Setting the XML Encoding Option (Optional)

Understanding the PeopleSoft Advanced Configurator Server Initiation on Sun Solaris

After you install the Oracle WebLogic Server 10.3.1 and the PeopleSoft Advanced Configurator Server, you need to start the PeopleSoft Advanced Configurator Server. Oracle provides a startup script file, `startConfigurator.sh`.

You can call startConfigurator.sh the following two ways:

- Manually: Issue the `startConfigurator.sh` command on the command line.
- Automatically: Use the Sun Solaris daemon to start this script file after the system is running.

When you call the startConfigurator.sh script file, all of the necessary system environment variables are set up for the Oracle WebLogic Server, the Sun JDK, and the PeopleSoft Advanced Configurator Server.

The startConfigurator.sh script file performs the following tasks for you:

- Sets the appropriate system variables for the Sun JDK.
- Sets the appropriate system variables for the PeopleSoft Advanced Configurator Server.
- Defines a Java classpath for the Oracle WebLogic Server.
- Starts the PeopleSoft Advanced Configurator Server.

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Task 12-7-1: Starting PeopleSoft Advanced Configurator Server from the Command Line

To start the PeopleSoft Advanced Configurator Server from the command line:

1. Log in as the Oracle WebLogic Server user.
2. Change the directory to the location of the PeopleSoft Advanced Configurator Server by using this command:

   ```
   cd <WEBLOGIC_HOME>/config/CalicoDomain
   ```

3. Start the script file by using this command:

   ```
   ./startConfigurator.sh
   ```

   The script starts the PeopleSoft Advanced Configurator server.

Note. To start and run the server in the background, use this command:

```
nohup ./startConfigurator.sh &
```

Task 12-7-2: Stopping the PeopleSoft Advanced Configurator Server from the Command Line

To stop the startConfigurator script file from the command line:

1. Log in as the Oracle WebLogic Server user.
2. Change the directory to the location of the PeopleSoft Advanced Configurator Server by using this command:

   ```
   cd <WEBLOGIC_HOME>/config/CalicoDomain
   ```

3. Start the script file with the command:

   ```
   ./stopConfigurator.sh
   ```

   This stops the PeopleSoft Advanced Configurator Server.

Task 12-7-3: Automatically Starting the PeopleSoft Advanced Configurator Server

To set up the PeopleSoft Advanced Configurator Server to start automatically when the Sun Solaris system starts:

1. Log in as root.
2. Create a file called Advanced_Configurator_ctl in /etc/init.d.

   The file looks like this (with CONFIG_HOME modified as necessary for your system):

   ```
   #!/sbin/sh
   CONFIG_HOME=<WEBLOGIC_HOME>/config/CalicoDomain
   case "$1" in
   'start')
   echo 'starting Advanced Configurator Server.'
   ```

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```
su - weblogic -c "cd $CONFIG_HOME; ./startConfigurator.sh 1>/dev/null 2>&1" &
;;
'stop')
echo 'stopping Advanced Configurator Server.'
su - weblogic -c "cd $CONFIG_HOME; ./stopConfigurator.sh 1>/dev/null 2>&1" &
;;
*)
echo "Usage $0 { start | stop }"
;;
esac
exit 0
```

3. Link the Advanced Configurator_ctl file to the /etc/rc 3.d directory:

```
ln Advanced Configurator_ctl /etc/rc3.d/K99configurator
ln Advanced Configurator_ctl /etc/rc3.d/S99configurator
```

Task 12-7-4: Resetting the Port

To change the server port:

1. Open the Oracle WebLogic Server Administration console for the Calico Domain:

   http://<host_name>:7777/console

   Note. 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

   Log in with the user name and password.
2. Select Environment, Servers, MyServer.
3. On the Configuration page, General sub-tab, enter a new value for Listen Port.
4. Click the Save button and restart the PeopleSoft Advanced Configurator Server.

Task 12-7-5: Setting the XML Encoding Option (Optional)

This task is optional. Product configuration data that is created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter in the solution, using the Oracle WebLogic Server Console.

Note. Oracle recommends that you use the default UTF-8, or that you change the encoding to specify the Internet Assigned Numbers Authority (IANA) encoding name.

To change XML output encoding:

1. Open the file web.xml for editing, found in:

   <WEBLOGIC_HOME>/config/CalicoDomain/applications/CalicoApp/Web-inf
2. Locate these lines in the XML file:

```
<servlet>
```

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```
  <servlet-name>copxml</servlet-name>
  <servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet</
servlet-class>
```

3. Create a new sub-element of the <servlet> element called <init-param>.

   Other sub-elements called <init-param> may already exist; do *not* modify these. Enter the encoding that you want in the param-value element (this example uses Shift-JIS):

```
<init-param>
      <param-name>encoding</param-name>
      <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the PeopleSoft Advanced Configurator Server.

Task 12-8: Installing the PeopleSoft Visual Modeler

This section discusses:

- Understanding the PeopleSoft Visual Modeler
- Installing the PeopleSoft Visual Modeler on Microsoft Windows
- Uninstalling the PeopleSoft Visual Modeler

Understanding the PeopleSoft Visual Modeler

The PeopleSoft Visual Modeler is a hierarchical modeling tool for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.

The PeopleSoft Visual Modeler is designed for use in a Microsoft Windows environment.

To compile a model, the PeopleSoft Visual Modeler requires access to a PeopleSoft Advanced Configurator Server that can be local or remote.

In addition, if model data is stored externally in a database, you can specify the connection in PeopleSoft Visual Modeler. This section describes some of the information that you need to gather before installing PeopleSoft Visual Modeler.

For information on the hardware and software requirements for PeopleSoft Visual Modeler, see the *PeopleSoft CRM 9.1 Hardware and Software Requirements Guide*.

See *PeopleSoft CRM 9.1 Hardware and Software Requirements Guide.*

Supported Databases:

Use of the PeopleSoft Visual Modeler does not require a database installed on your system. However, if you want to use external data within your models, the PeopleSoft Visual Modeler supports the same databases as PeopleSoft Advanced Configurator Server (see Prerequisites)

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Task 12-8-1: Installing the PeopleSoft Visual Modeler on Microsoft Windows

To install the PeopleSoft® Visual Modeler™:

1. If the Oracle WebLogic Server 10.3.1 or the PeopleSoft Advanced Configurator Server is not yet installed on a server, do so now before proceeding.
2. Log in as Microsoft Windows Administrator or as a user with administrative privileges.
3. Insert the CRM 9.1 CD-ROM in the drive (of a Windows machine).

   You can retrieve the PeopleSoft CRM WebLogic files from Oracle Software Delivery Cloud.
4. Double-click `setup.exe` to launch the installation.
5. Click Next.

   The License Agreement dialog appears.
6. Accept the license agreement and click Next.

   The Select Database dialog appears.
7. Select the type of database that you plan to use.
8. If you are prompted to select Unicode or non-Unicode; choose appropriately according to your database setup.

   The Server Selection dialog appears.
9. If you are installing only PeopleSoft Advanced Configurator, select only PeopleSoft File Server.

   Otherwise, select PeopleSoft File Server and any other PeopleSoft servers that you want to install.

   The Directory Selection dialog appears.
10. Select the directory in which to install the PeopleSoft Visual Modeler installer.

    The Product Selection dialog appears.
11. If you want to install only PeopleSoft Advanced Configurator, clear the check boxes of all products except PeopleSoft Advanced Configurator.

    Otherwise, select PeopleSoft Advanced Configurator and any other products that you want to install.

    The PeopleSoft Visual Modeler installer is copied to the directory that you specified earlier.
12. Navigate to that directory and, within it, navigate to: <*PS_HOME*>\setup\AdvancedConfigurator\ViM
13. Double-click `VisualModeler_setup.exe` to launch the installation.

    The InstallShield Wizard Welcome page appears, as shown in the following example:

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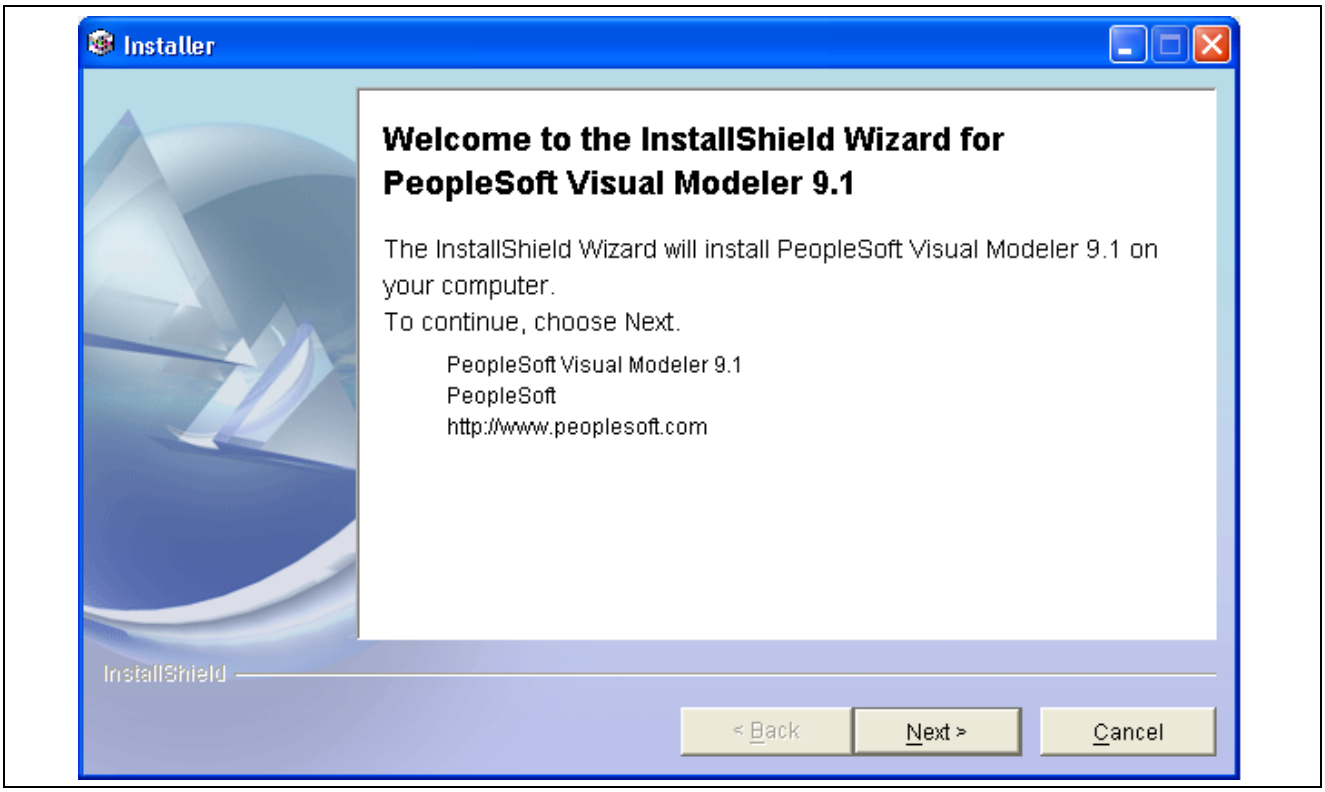

PeopleSoft Visual Modeler InstallShield Wizard - Welcome page

14. Click Next.

    The License agreement dialog appears, as shown in the following example:

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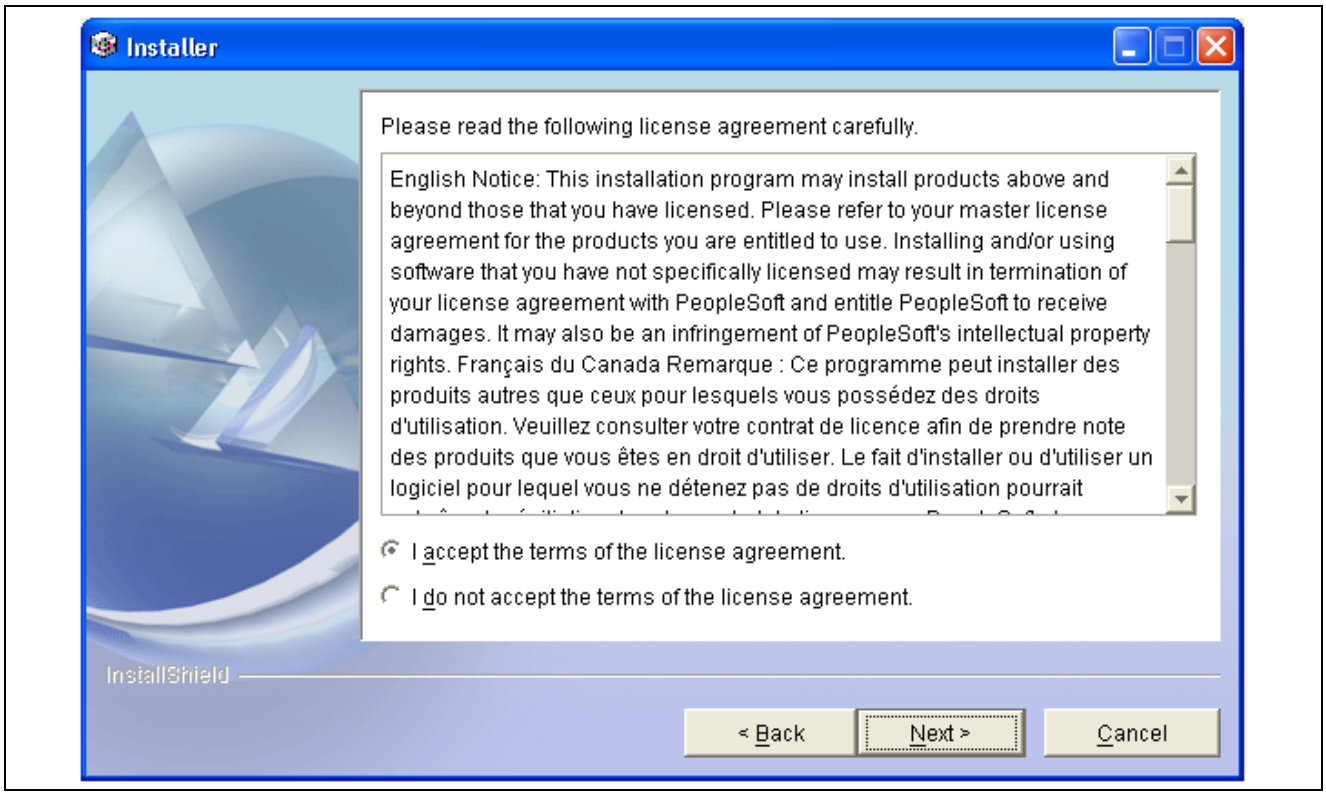

PeopleSoft Visual Modeler InstallShield Wizard - License Agreement page

15. Accept the terms of the license agreement and click Next.

The Install location page appears, as shown in the following example:

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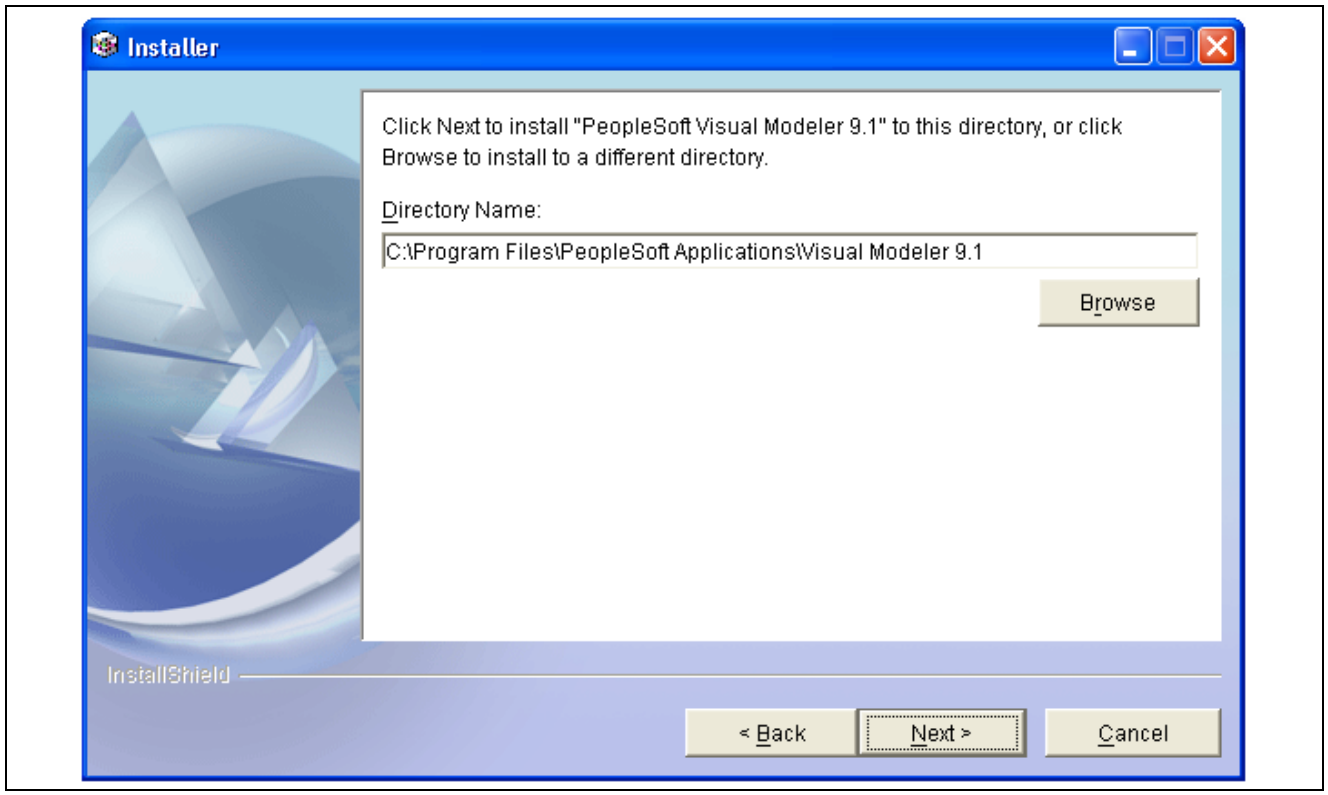

PeopleSoft Visual Modeler InstallShield Wizard - Directory selection

By default, files are installed in C:\Program Files\PeopleSoft Applications\Visual Modeler 9.1.

16. Click Next.

The setup type page appears, as shown in the following example:

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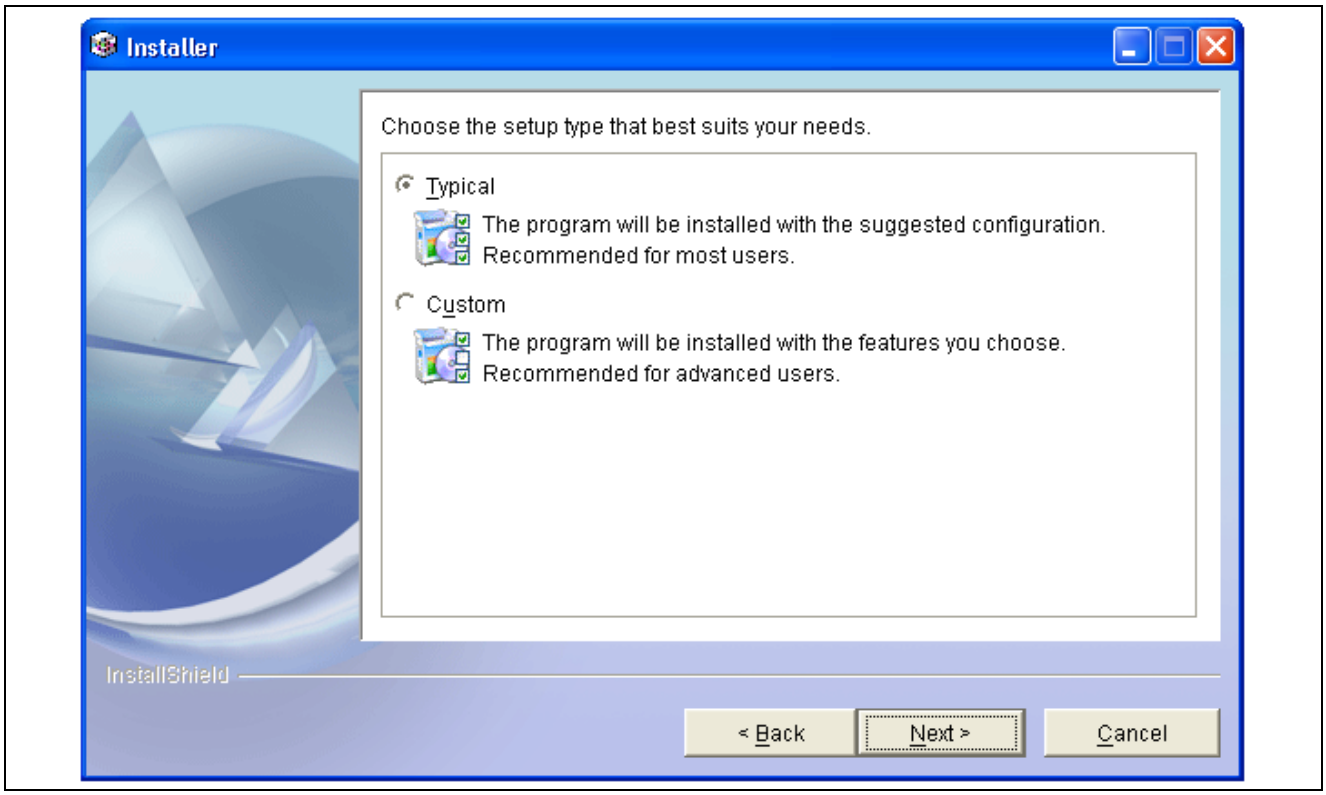

PeopleSoft Visual Modeler InstallShield Wizard - Setup type option page

17. Select Typical or Custom install.
18. Click Next.

    The PeopleBooks location page appears, as shown in the following example:

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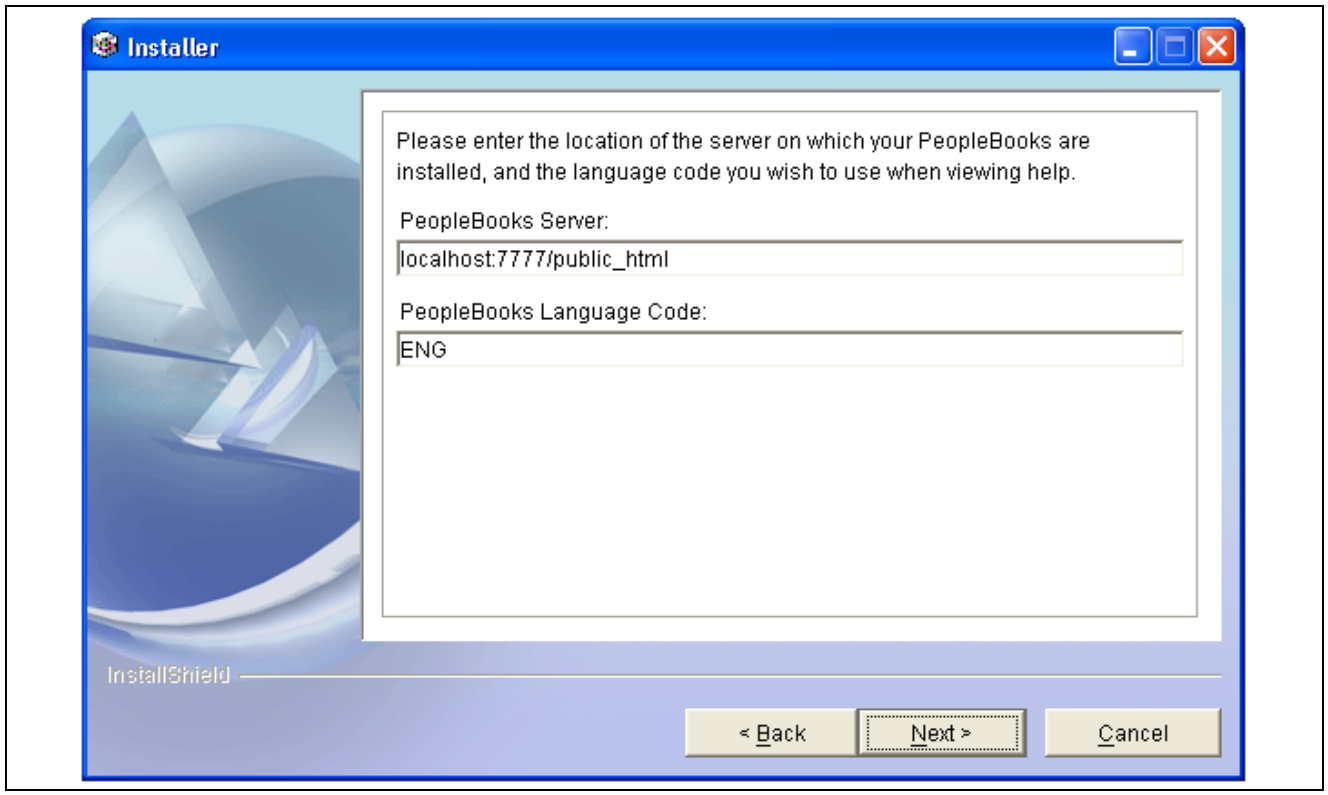

PeopleSoft Visual Modeler InstallShield Wizard - Specify PeopleBooks server option page

19. Enter the location of the server where you installed the PeopleSoft PeopleBooks.
20. Click Next.

    The Summary Information Dialog appears, as shown in the following example:

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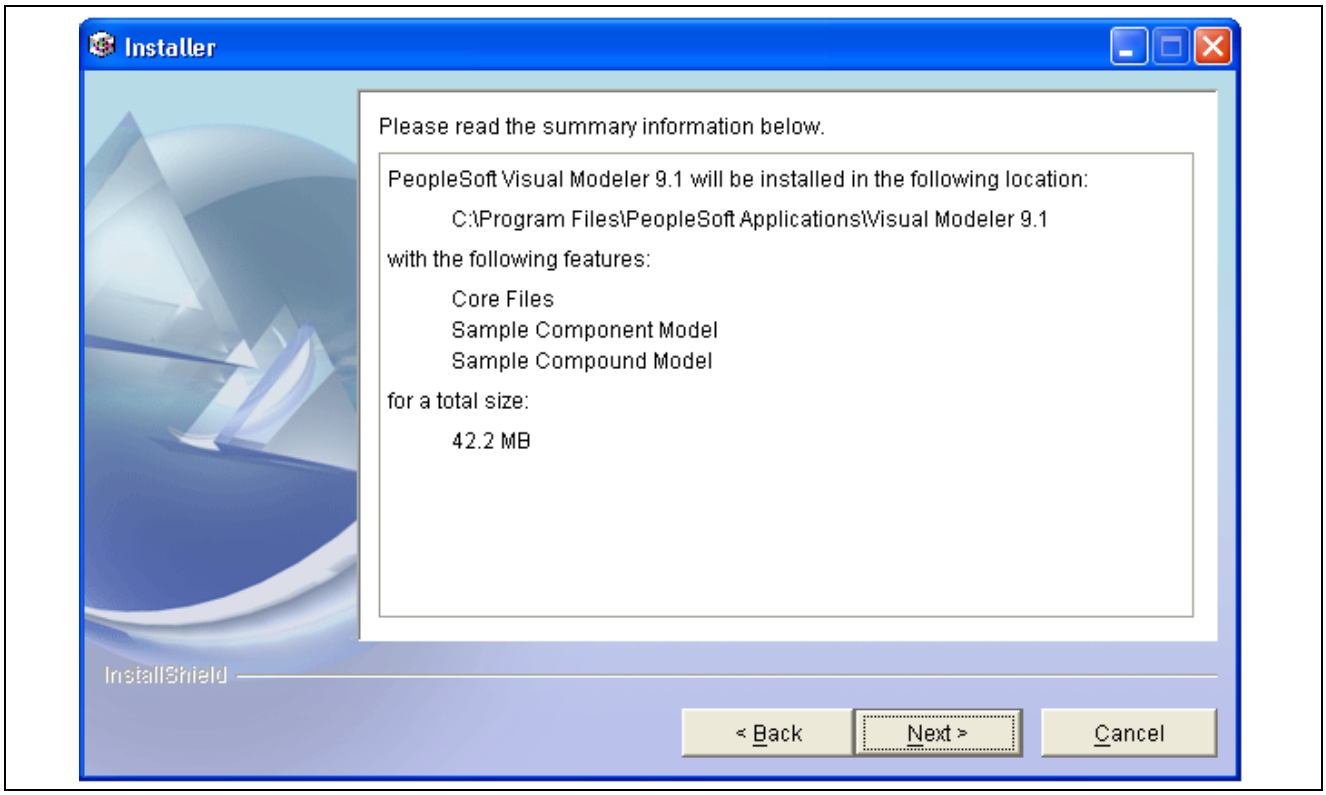

PeopleSoft Visual Modeler InstallShield Wizard - Summary Information page

21. Click Next to continue.

    The installation begins.

Note. There is no need to restart the system after your installation completes.

Task 12-8-2: Uninstalling the PeopleSoft Visual Modeler

Use the Control Panels Add/Remove Programs utility to uninstall PeopleSoft Visual Modeler. The uninstall program removes the PeopleSoft Visual Modeler files from your system. Files that are generated while using the product remain intact.

Task 12-9: Installing for Integration with PeopleSoft Order Capture

This section discusses:

- Understanding PeopleSoft Advanced Configurator and PeopleSoft Order Capture Integration
- Reviewing the Recommended Architecture
- Installing the PeopleSoft Advanced Configurator for Integration with PeopleSoft Order Capture
- Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

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Understanding PeopleSoft Advanced Configurator and PeopleSoft Order Capture Integration

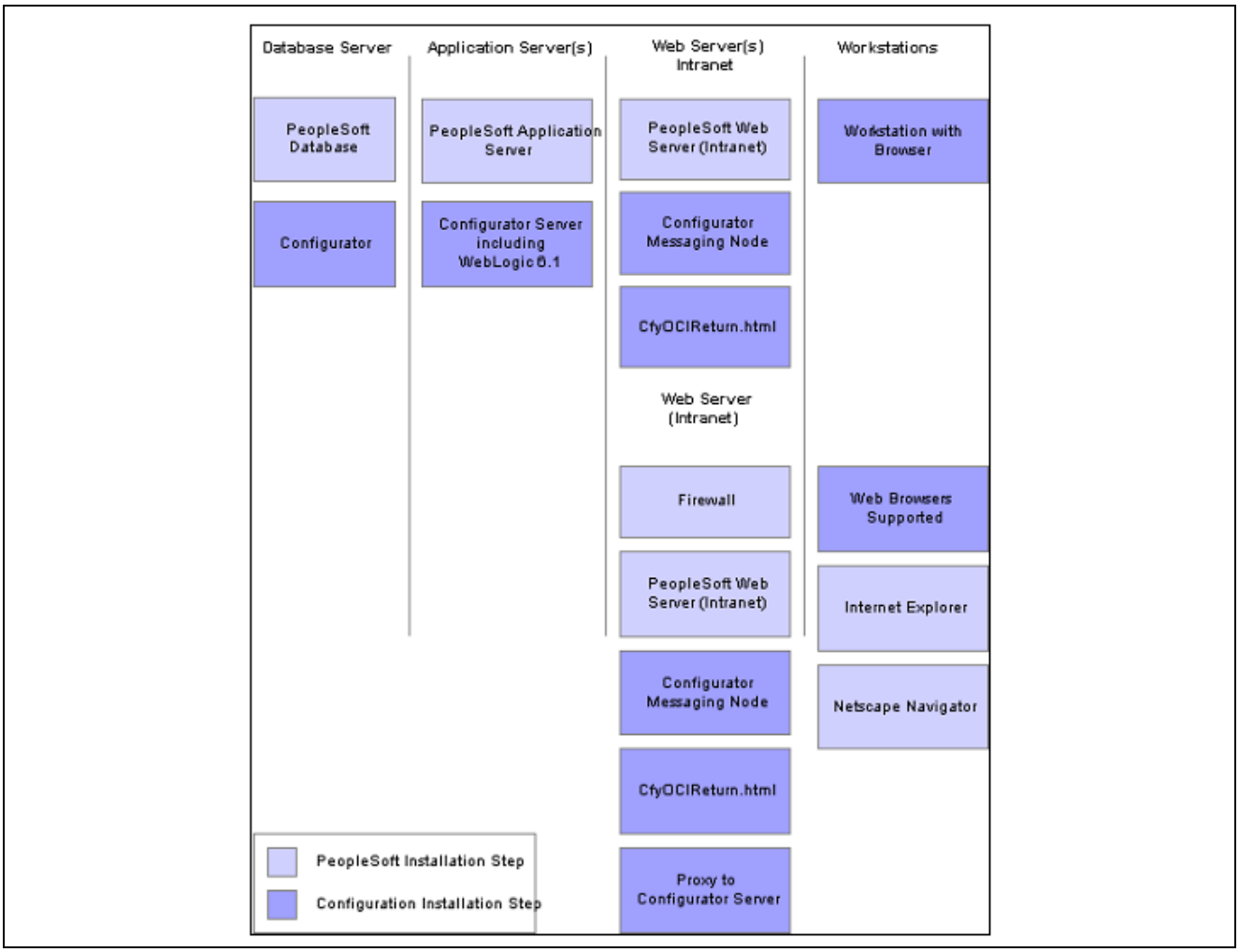
This section describes how to install and set up the components necessary to integrate the PeopleSoft Advanced Configurator web application with PeopleSoft Order Capture (OC). After setup completes, a user creating an order can launch a configuration session from an order entry line, configure a product, and return to the PeopleSoft Order Capture page with the updated product information.

The general steps necessary to integrate the PeopleSoft Advanced Configurator web application with PeopleSoft Order Capture are:

1. Install the Oracle WebLogic Server for PeopleSoft Advanced Configurator.
2. Install the PeopleSoft Advanced Configurator server.
3. Set up the PeopleSoft Advanced Configurator server.
4. Set up proxy servers, as required.

Task 12-9-1: Reviewing the Recommended Architecture

The following diagrams represent the recommended architecture for PeopleSoft Advanced Configurator and PeopleSoft Order Capture (OC) for low-volume environments:



Recommended architecture for low-volume environments

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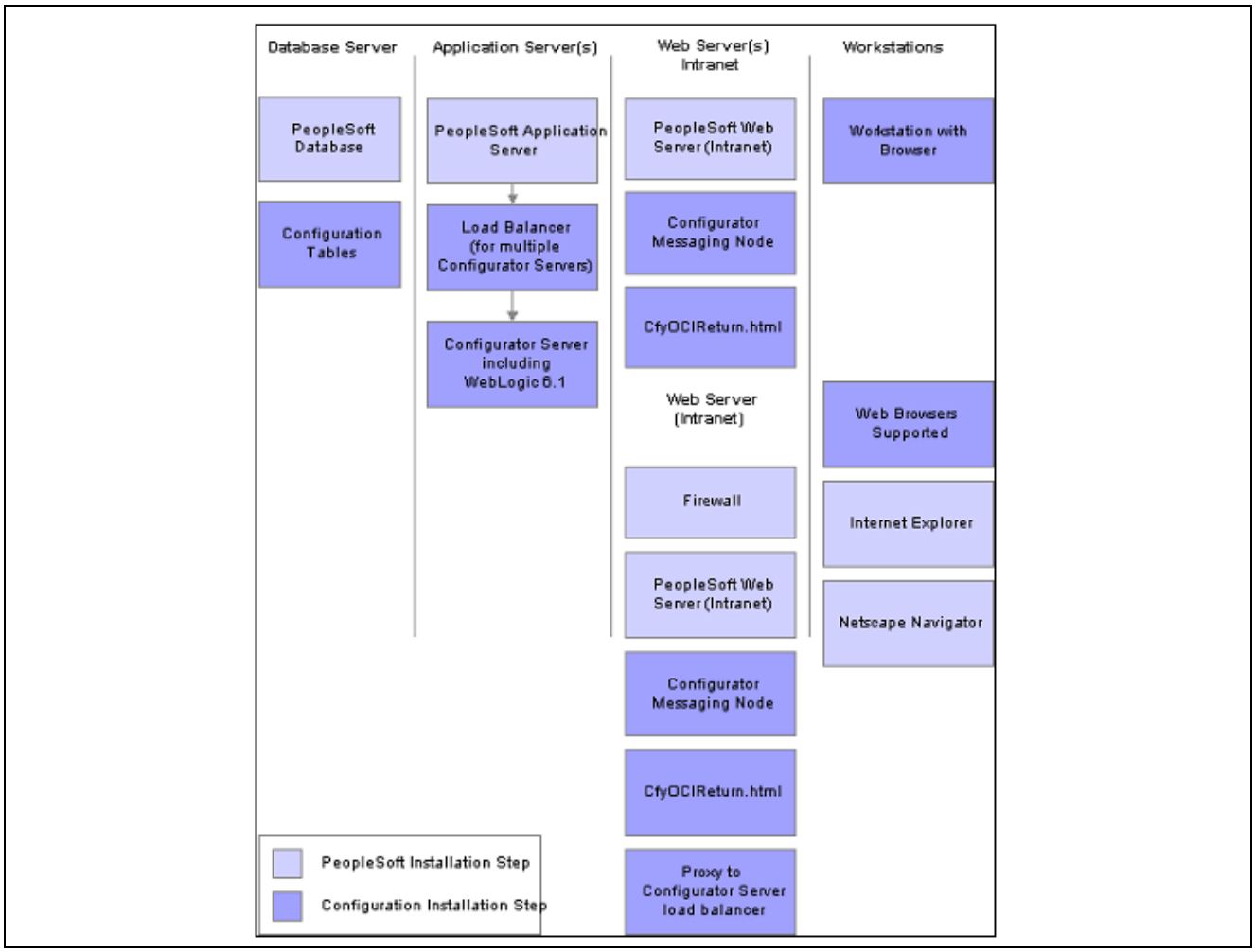
The following diagrams represent the recommended architecture for PeopleSoft Advanced Configurator and PeopleSoft Order Capture (OC) for high-volume environments:



Recommended architecture for high-volume environments

Task 12-9-2: Installing the PeopleSoft Advanced Configurator for Integration with PeopleSoft Order Capture

To install the PeopleSoft Advanced Configurator for integration with PeopleSoft Order Capture (OC):

1. Install your PeopleSoft PeopleTools-based CRM system, including the WebServer, Appserver and Database.
2. Set up a working Integration Broker server using the PeopleSoft PeopleTools documentation.
3. Install the Oracle WebLogic Server 10.3.1 (as previously instructed).

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Note. Oracle recommends that you install the Oracle WebLogic Server 10.3.1 for the PeopleSoft Advanced Configurator Server in a separate Oracle WebLogic instance on your PeopleSoft web server (for example, c:\bea_cfg instead of the default c:\bea) to ensure that the correct version of the Oracle WebLogic application server is used for your PeopleSoft Advanced Configurator Server. For better performance, you can install the PeopleSoft Advanced Configurator Server on a separate application server from your PeopleSoft PeopleTools-based web server. You can also use a load balancer to add additional PeopleSoft Advanced Configurator servers to the system.

4. Install the PeopleSoft Advanced Configurator Server on your web server (as previously described).

Note. When you run the PeopleSoft Advanced Configurator installation, you must select the option to set up a database to contain configurations. Enter the database connectivity information for your PeopleSoft CRM database.

5. If required, set up a proxy to the PeopleSoft Advanced Configurator Server.
6. On your PeopleSoft CRM system, select PeopleTools, Integration Broker, Integration Setup, Nodes.
7. Search for and select the *PSFT_CFG* node.
8. Click the Connectors tab to access the Connectors page.
9. Edit the PRIMARY URL property and replace "crmconfig01.peoplesoft.com" with your server name.

Note. 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

Task 12-9-3: Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

For implementations that use a PeopleSoft Web server outside of a firewall, an additional installation step is required.

By default, the PeopleSoft Advanced Configurator Server is set up to listen on port 7777. Most implementations do not open this port in the firewall, so any requests that contain 7777 in their URL (for example, http://ps_config_server_ip:7777/copxml) result in an error that indicates that the page cannot be found.

The solution is to proxy (redirect) certain requests from the PeopleSoft Web server that is outside the firewall to the PeopleSoft Advanced Configurator server inside the firewall. When the PeopleSoft Web server receives a request with a URL known to the proxy setup, it redirects the request to the PeopleSoft Advanced Configurator server.

For example, a request of http://ps_web_server_ip/copxml will be redirected to the PeopleSoft Advanced Configurator server. The 7777 suffix is not included in the URL, so there are no issues with firewall permission.

The following URLs require proxy set up in an installation of a PeopleSoft Web server outside of a firewall:

- http://ps_config_server_ip:7777/copxml
- http://ps_config_server_ip:7777/solutions/*
- http://ps_config_server_ip:7777/calico/*
- http://ps_config_server_ip:7777/solutionlist
- http://ps_config_server_ip:7777/ConfigServerInfo/*

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Example Proxy Setup for the Oracle WebLogic Server

Insert the following text into the web.xml file for the PeopleSoft Web Server (the default location is c:\bea\wlserver_10.3\config\peoplesoft\applications\PORT AL\WEB-INF\web.xml):

```
<!-- Advanced Configurator Server Proxy Start -->
<servlet>
<servlet-name>ProxyServlet</servlet-name>
<servlet-class>weblogic.t3.srvr.HttpProxyServlet</servlet-class>
<init-param>
<param-name>redirectURL</param-name>
<param-value>http://ps_config_server_ip:7777</param-value>
</init-param>
</servlet>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/solutions/*</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/calico/*</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/copxml</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/solutionlist</url-pattern>
</servlet-mapping>
<!-- Advanced Configurator Server Proxy End -->
```

Note. The following section maps a Solutions directory. You should install all solutions under this directory:

```
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>

<url-pattern>/solutions/*</url-pattern>
</servlet-mapping>
```

Task 12-10: Installing Multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows (Optional)

This section discusses:

- Using Multiple Oracle WebLogic Server Installations
- Using a Single Oracle WebLogic Server Installation

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The PeopleSoft Advanced Configurator 9 installer for Microsoft Windows only allows one instance to be installed per machine. However, multiple instances can be created be executing a few manual steps.

There are two ways to install multiple instances:

- Using multiple Oracle WebLogic installs.
- Using a single Oracle WebLogic install.

  In both cases, the basic procedure is to run the installer to create the first installation, and then copy the %BEA_HOME%\wlserver_10.3\config\CalicoDomain directory.

Task 12-10-1: Using Multiple Oracle WebLogic Server Installations

To install multiple PeopleSoft Advanced Configurator Instances on Microsoft Windows using multiple Oracle WebLogic Server installations:

1. Run the Oracle WebLogic Server installer again.

   Ensure that you select the option to create a new BEA home.

2. Copy the CalicoDomain directory to the new BEA home (BEA_HOME_2). xcopy %BEA_HOME_1% \wlserver_10.3\config\CalicoDomain %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain /E /I

3. Edit %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\startConfigurator.cmd and %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\stopConfigurator.cmd.

   Change BEA_HOME and WL_HOME to reflect the new location.

4. Edit %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\install\propupdate.cmd and change all occurrences of the BEA_HOME_1 directory to BEA_HOME_2.

   If you do not need to run both instances at the same time, you can stop here.

   Otherwise, continue with steps 5 through 7 to change the listen port. The example steps show how you can change the port to 7001, but you can use any port number that you desire.

5. Edit %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\config.xml.

   Change ListenPort="7777" to ListenPort="7001".

6. Edit %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\stopConfigurator.cmd.

   Change -url localhost:7777 to -url localhost:7001.

7. Edit %BEA_HOME%/wlserver_10.3/config/CalicoDomain2/applications/CalicoApp/WEB-INF/config /LEDBAcc.properties. Change all occurrences of 7777 to 7001.

   If you also want to run both instances as services at the same time, then you can continue to step 8 to change the service name. In the example, the name is changed to "Configurator Instance 2," but you can choose any name that does not conflict with an existing service.

8. Edit %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\startConfigurator.cmd.

   Change set SERVICE_NAME=PeopleSoft Configurator server to set SERVICE_NAME=Configurator Instance

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Task 12-10-2: Using a Single Oracle WebLogic Server Installation

Creating multiple Configurator instances within the same Oracle WebLogic Server installation is similar to the process with multiple Oracle WebLogic Server installations. The key difference is that each instance must have a unique domain name.

To install multiple Configurator instances on Microsoft Windows using multiple Oracle WebLogic Server installations:

1. Copy the CalicoDomain directory.

   The target directory name will be the name of the new domain. xcopy %BEA_HOME%\wlserver_10.3 \config\CalicoDomain %BEA_HOME%\wlserver_10.3\config\CalicoDomain2 /E /I.

   Steps 2 through 5 will complete the domain name change for the new instance.

2. Edit %BEA_HOME%\wlserver_10.3\config\CalicoDomain\config.xml.

   Change all occurrences of CalicoDomain to CalicoDomain2.

3. Edit %BEA_HOME%\wlserver_10.3\config\CalicoDomain\startConfigurator.cmd.

   Change all occurrences of CalicoDomain to CalicoDomain2.

4. Edit %BEA_HOME%\wlserver_10.3\config\CalicoDomain\stopConfigurator.cmd.

   Change all occurrences of CalicoDomain to CalicoDomain2.

5. Edit %BEA_HOME_2%\wlserver_10.3\config\CalicoDomain\install\propupdate.cmd.

   Change all occurrences of CalicoDomain to CalicoDomain2. If you do not want to run both instances at the same time, you can stop here.

   Otherwise, continue with steps 6 through 8 to change the listen port. The example steps show you how to change the port to 7001, but you can use any port number that you desire.

6. Edit %BEA_HOME%\wlserver_10.3\config\CalicoDomain2\config.xml.

   Change ListenPort="7777" to ListenPort="7001".

7. Edit %BEA_HOME%\wlserver_10.3\config\CalicoDomain2\stopConfigurator.cmd.

   Change -url localhost:7777 to -url localhost:7001.

8. Edit %BEA_HOME%/wlserver_10.3/config/CalicoDomain2/applications/CalicoApp/WEB-INF/config /LEDBAcc.properties.

   Change all occurrences of 7777 to 7001. If you also want to run both instances as services at the same time, then you can proceed to step 9 to change the service name. In the example, the name is changed to "Configurator Instance 2", but you can choose any name that does not conflict with an existing service.

9. Edit %BEA_HOME%\wlserver_10.3\config\CalicoDomain2\startConfigurator.cmd Change set SERVICE_NAME=PeopleSoft Configurator Server to set SERVICE_NAME=Configurator Instance 2

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CHAPTER 13

Installing the Oracle WebLogic Controller

This chapter discusses:

- Understanding the Oracle WebLogic Controller
- Prerequisites
- Installing the Oracle WebLogic Controller on UNIX
- Installing the Oracle WebLogic Controller on Microsoft Windows
- Configuring and Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

Understanding the Oracle WebLogic Controller

N-Level products is an enhancement to Product Model as used by PeopleSoft Order Capture (OC). The enhancement requires the installation of a new Sun Java controller that interacts with the Product Configurator (PeopleSoft Advanced Configurator) for the Oracle WebLogic Controller. This controller application is designed to support Multilevel products used mainly in the communication industry.

This chapter provides instructions for the installation and set up of the Oracle WebLogic Controller.

Note. Before proceeding with your installation, consult My Oracle Support, to ensure that you have the latest version of the following documents: PeopleSoft PeopleTools 8.52 Installation guide for your database platform and PeopleSoft PeopleTools 8.52 PeopleBooks.

Note. Consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

Note. Before you begin your installation of the Oracle WebLogic Controller, consult the PeopleSoft CRM 9.1 Hardware and Software Requirements Guide available on My Oracle Support for the latest supported platform information.

Note. The APC (Advanced Product Configurator) is also referred to in this chapter as the PeopleSoft Advanced Configurator.

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Prerequisites

You must complete the following requirements before proceeding with your Oracle WebLogic Controller installation:

1. You must install and configure the PeopleSoft Advanced Configurator before proceeding with the tasks in this chapter.
2. Complete the task “Setting Up the PeopleSoft Integration Broker” in Chapter 1 of this PeopleSoft CRM 9.1 Installation guide.

See "Installing the PeopleSoft Advanced Configurator 9.1"

Task 13-1: Installing the Oracle WebLogic Controller on UNIX

This section discusses:

- Installing the PeopleSoft Advanced Configurator
- Exporting the Configuration and Running the AE Program
- Installing the PeopleSoft Visual Modeler 9.1
- Updating JNDIDBName.properties
- Compiling the ProductCatalogueRepository Model and Exporting the XML File
- Using Web Based Compilation
- Creating the Oracle WebLogic Controller Domain on UNIX
- Creating the WebApplications Folder Under the Controller Domain
- Modifying the Webservices Properties File (webservices.properties)
- Modifying the Application Properties File (application.properties)
- Deploying the Oracle WebLogic Controller Application

Task 13-1-1: Installing the PeopleSoft Advanced Configurator

Install the PeopleSoft Advanced Configurator server on your UNIX system.

See "Installing the PeopleSoft Advanced Configurator 9.1"

This chapter appears earlier in this installation guide.

Verify that the PeopleSoft Advanced Configurator server is started by navigating to: *http://<configurator server>:7777/*

Task 13-1-2: Exporting the Configuration and Running the AE Program

To export the configuration and run the Application Engine (AE) program:

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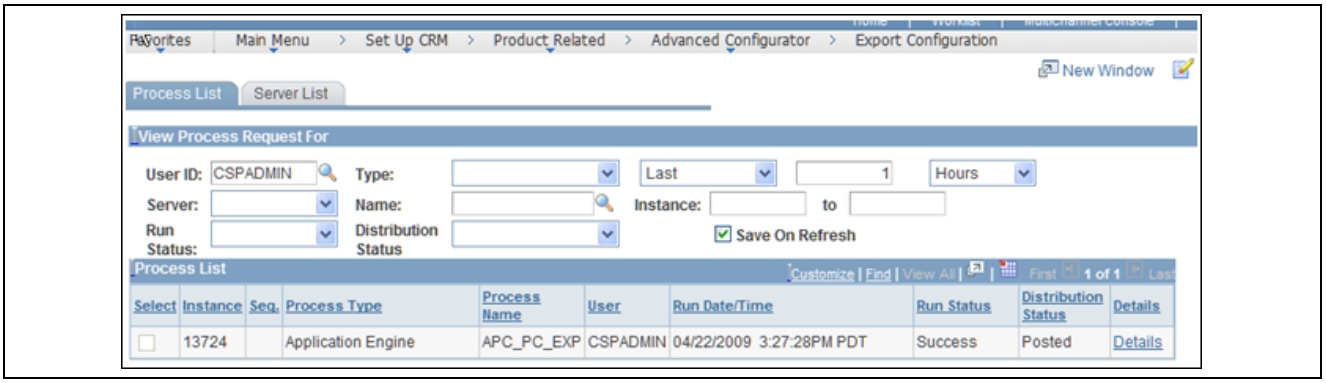
1. Login to PeopleSoft Pure Internet Architecture for the target PeopleSoft environment.
2. Select Set Up CRM, Product Related, Advanced Configurator, Export Configuration.
3. Click Add a new value. Enter a Run Control ID and click Add.

   The Export Product Definitions page appears.
4. Enter a value in the Request ID field.
5. Click the Run button to run the AE program (APC_PC_EXP) using the default settings, as shown in the following example of the Process List page:



PeopleSoft Advanced Configurator - Export Configuration: Process List page

6. Click OK.

Task 13-1-3: Installing the PeopleSoft Visual Modeler 9.1

To install the PeopleSoft Visual Modeler:

See "Installing the PeopleSoft Advanced Configurator," Installing the PeopleSoft Visual Modeler 9.1.

Task 13-1-4: Updating JNDIDBName.properties

To update the JNDIDBName.properties:

1. Ensure that APC (PeopleSoft Advanced Configurator) Server instance is not running; shut down the server.
2. Set up the APC (PeopleSoft Advanced Configurator) database connection by editing the file: <*WEBLOGIC_HOME*>/Config/CalicoDomain/applications/CalicoApp/WEB-INF/config /JNDIDBName.properties

   The JNDIDBName.properties file should look similar to this example:

```
# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database⇒
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
```

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```
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
db2db.url=jdbc:db2://[HostName]:[PortNumber]/[DatabaseName]
db2db.driver=com.ibm.db2.jcc.DB2Driver
db2db.username=[username]
db2db.password=[password]

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4
```

3. Edit the values of the database platform for your respective database:

```
For SQL Server: replace sqldb with your Sql Server database name.
For Oracle: replace oraceldb with your Oracle database name.
For DB2: replace db2db with your DB2 database name.

Replace the url settings for your platform with your appropriate values.
Replace [username] for your platform with your database owner id.
Replace [password] for your paltform with your database owner id password.
```

   The PSCFG settings should already be configured based on the settings you entered while installing the APC (PeopleSoft Advanced Configurator) server. The PSCFG settings should match the database settings that you just modified for your respective platform.

4. The following JNDIDBName.properties file is an example after it has been modified for a DB2 database:

```
# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database⇒
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
CR91USHP.url=jdbc:db2://ui-lnx09:60003/CR91USHP
CR91USHP.driver=com.ibm.db2.jcc.DB2Driver
CR91USHP.username=upgtest4
```

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```
CR91USHP.password=upgtest4

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4
```

5. After you complete the modifications, restart the APC (PeopleSoft Advanced Configurator) server instance.

Task 13-1-5: Compiling the ProductCatalogueRepository Model and Exporting the XML File

This section discusses:

- Compiling the ProductCatalogueRepository Model
- Exporting the XML File

Compiling the ProductCatalogueRepository Model

To compile the *ProductCatalogueRepository* model with the PeopleSoft Visual Modeler, perform these steps:

1. From the UNIX server where you installed the APC (PeopleSoft Advanced Configurator) server, navigate to the *ProductCatalogueRepository* model. The location of this model is :

   <*WEBLOGIC_HOME*>/config/CalicoDomain/install/controller/ViM-model/<*MODEL_TYPE*> /ProductCatalogueRepository

   ---

   Note. The <*MODEL_TYPE*> depends on what you are installing. The models are contained in these folders:

   For DB2 and MSS, access the *mss_2008* directory.

   For Oracle, access the *oracle* directory.

   ---

2. FTP the *ProductCatalogueRepository* model folder to your Microsoft Windows environment where you installed the PeopleSoft Visual Modeler. You can place the folder in any accessible location.

   Important! FTP the *ProductCatalogueRepository* model in binary mode.

   ---

3. Start the PeopleSoft Visual Modeler 9.1 application. Close the dialog box upon startup if it appears.
4. Click File, Open Workspace. Open the *ProductCatalogueRepository.csw* file from the *ProductCatalogueRepository* model that you placed on your Microsoft Windows environment in the previous steps.
5. A database connection dialog box appears. Enter your database connection information, and then click the Retry button.
6. From the menu, select Project, Settings to open the Project Settings dialog box.
7. Define the PeopleSoft Configurator Server Location with the proper values that point to the APC (PeopleSoft Advanced Configurator) server and port number on UNIX.
8. Click OK to save the settings.

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9. Click the Compile icon (hover to locate the *Compile the model* icon) on the PeopleSoft Visual Modeler menu.
10. Verify that you receive no errors. Warnings are okay. These warnings are due to related language entry and can be ignored.

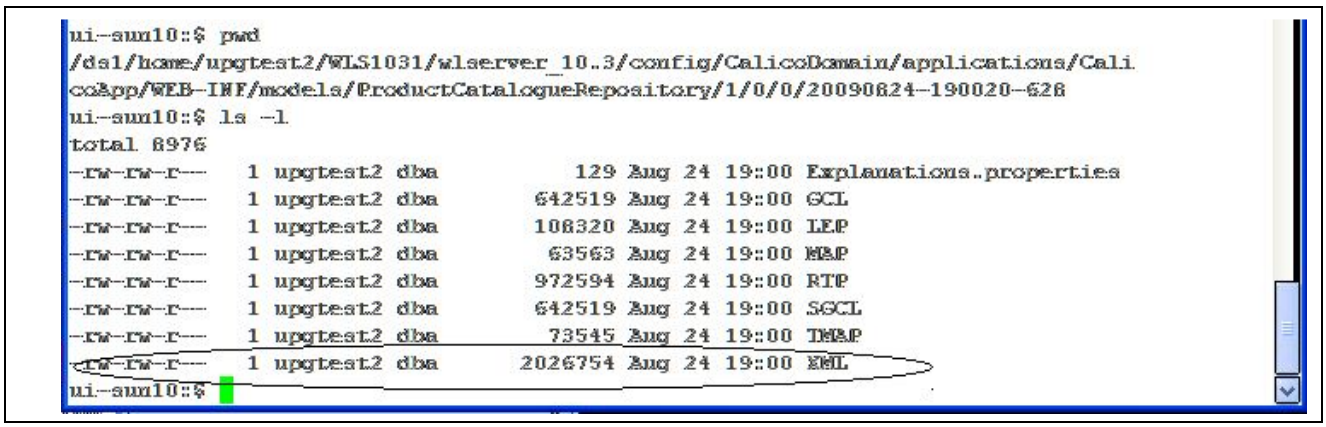
Exporting the XML File

To export the XML file:

1. From the UNIX server where you installed the APC (PeopleSoft Advanced Configurator) server, navigate to the XML file in the *ProductCatalogueRepository*.

   This example details the path: <*WEBLOGIC_HOME*>/config/CalicoDomain/applications/CalicoApp /WEB-INF/models/ProductCatalogueRepository/1/0/0/20090824-190020-628

   The following shows an example of the path to the XML file in the ProductCatalogueRepository:



Example showing the path to the XML file in the ProductCatalogueRepository

---

Note. The date directory at the end of the path will vary. Select the most recent date.

---

2. FTP this precompiled XML file to your Microsoft Windows environment where you installed the Visual Modeler. You may place the file in any accessible directory.

Important! FTP the precompiled XML file in binary mode.

   You will compile this XML file using the web browser in the next task *Using Web Based Compilation*.

Task 13-1-6: Using Web Based Compilation

To compile using the web:

1. Navigate to the PeopleSoft Advanced Configurator server running on your UNIX system.

   For example: http://<webserver>:7777/ConfigServerAdmin

Note. 7777 is the default port for the PeopleSoft Advanced Configurator. Your port may vary depending on your configuration.

---

2. Click the Browse button on the PeopleSoft Advanced Configurator Administration page to select the XML file that you just exported from UNIX to Microsoft Windows, as shown in the following example:

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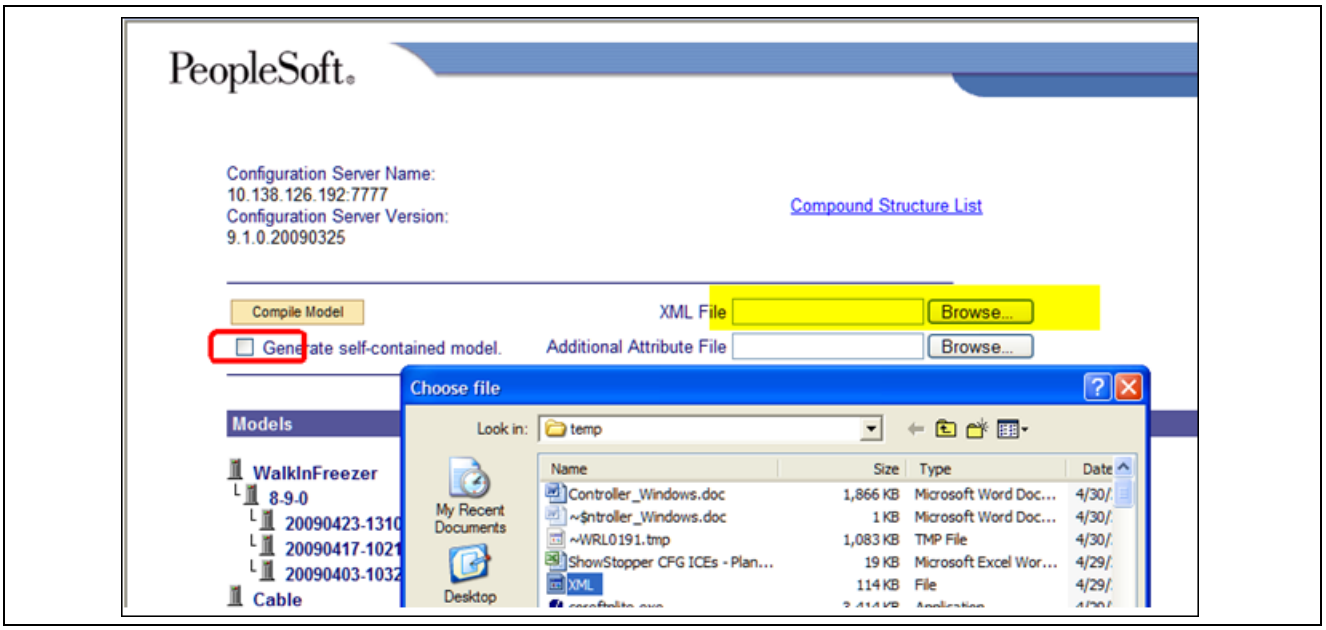

PeopleSoft Advanced Configurator - Choose file dialog box

3. On the PeopleSoft Advanced Configurator server Administration page, select the Generate self-contained model check box.
4. Click the Compile Model button.

Task 13-1-7: Creating the Oracle WebLogic Controller Domain on UNIX

Depending on your selection, the Oracle WebLogic Controller Configuration Wizard guides you through the steps necessary to create a new domain or extend an existing domain.

To create the Oracle WebLogic Controller domain on UNIX:

1. Access the Fusion Middleware Configuration Wizard from: <*WEBLOGIC_HOME*>/common/bin/config.sh

   The Fusion Middleware Configuration Wizard window appears, as shown in the following example:

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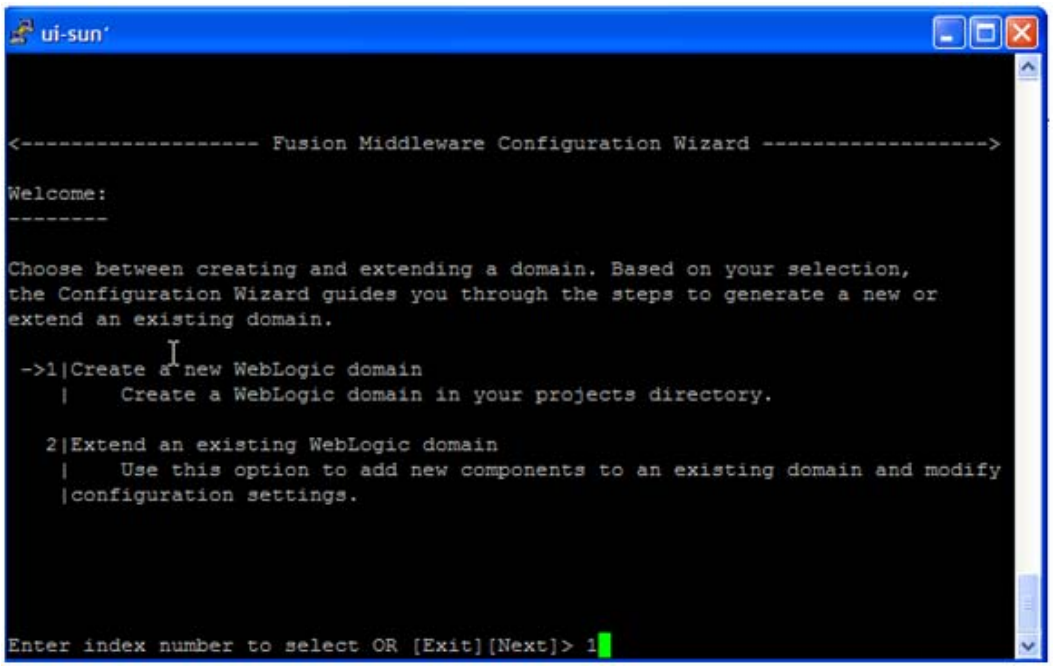
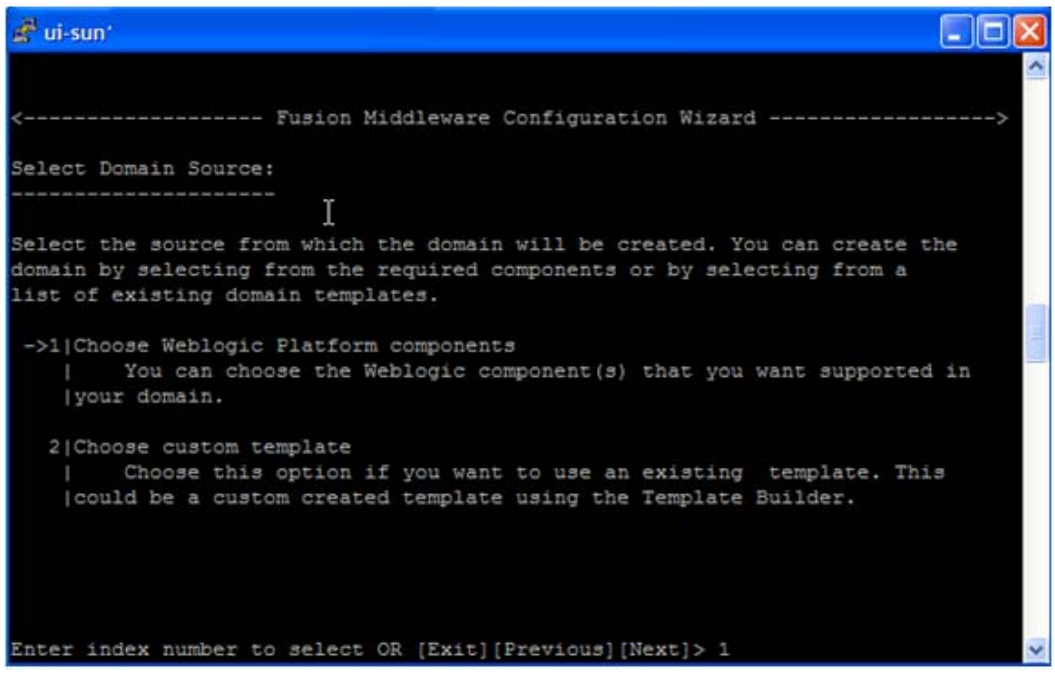


Fusion Middleware Configuration Wizard - Welcome window

2. Create an Oracle WebLogic domain in your projects directory.
3. In the Fusion Middleware Configuration Wizard - Select Domain Source window, enter the index number, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Domain Source window

4. Press the Enter key on your keyboard.

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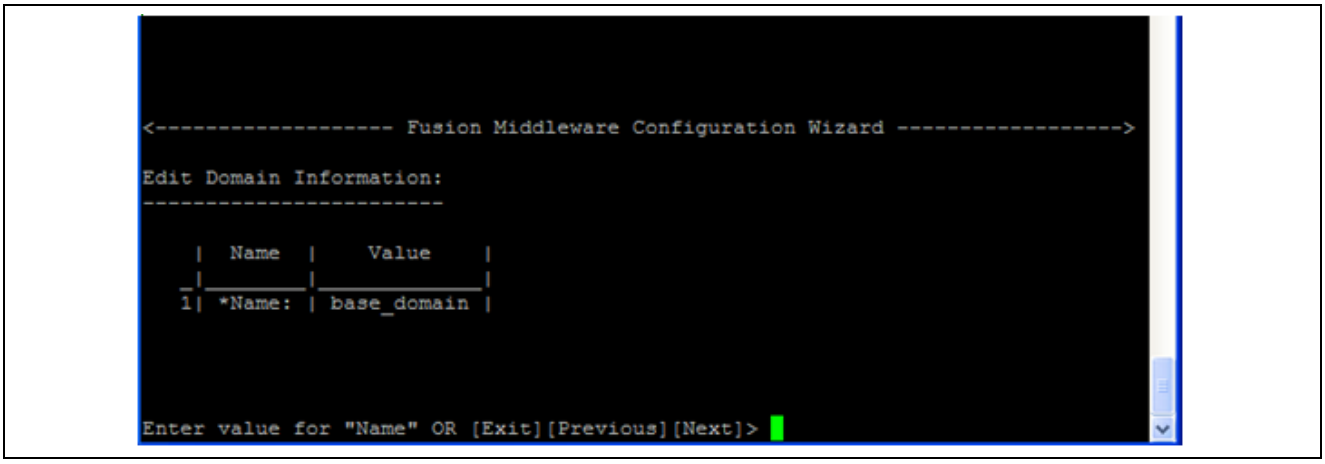
5. In the Fusion Middleware Configuration Wizard - Edit Domain Information window, enter the Domain Name that you want (for example: Controller_Domain), and the Target Location (for example: <WEBLOGIC_HOME>\config), as shown in the following example:



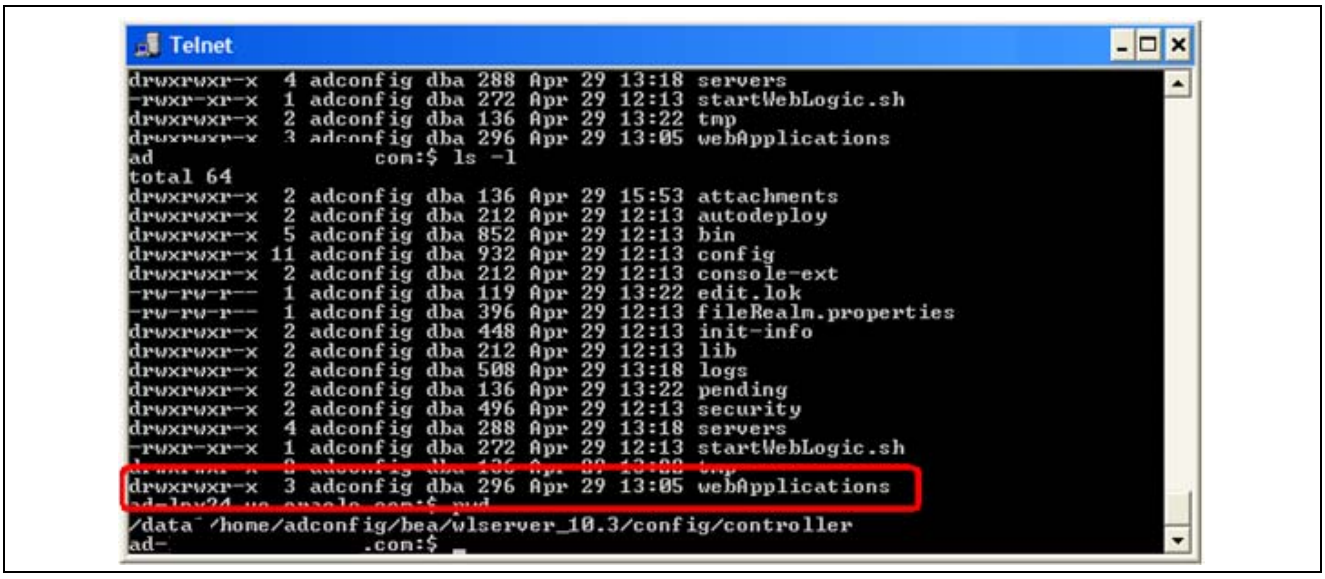
Fusion Middleware Configuration Wizard - Edit Domain Information window

6. Create a user to be assigned to the Administrator role. This user is the default administrator that you use to start development mode servers.
7. Enter the option number to select, and then complete the remainder of the installation using the Fusion Middleware Configuration Wizard.

Task 13-1-8: Creating the WebApplications Folder Under the Controller Domain

To create the WebApplications folder under the Oracle WebLogic Controller Domain:

1. Under your newly created Controller domain, create a new folder named *webApplications*, as shown in the following example:



Oracle WebLogic Controller Configuration Wizard - WebApplications folder

2. Copy the *controller.war* file from <*WEBLOGIC_HOME*>/config/CalicoDomain/install/controller to your <*ControllerDomain*>/webApplications folder, as shown in the following example:

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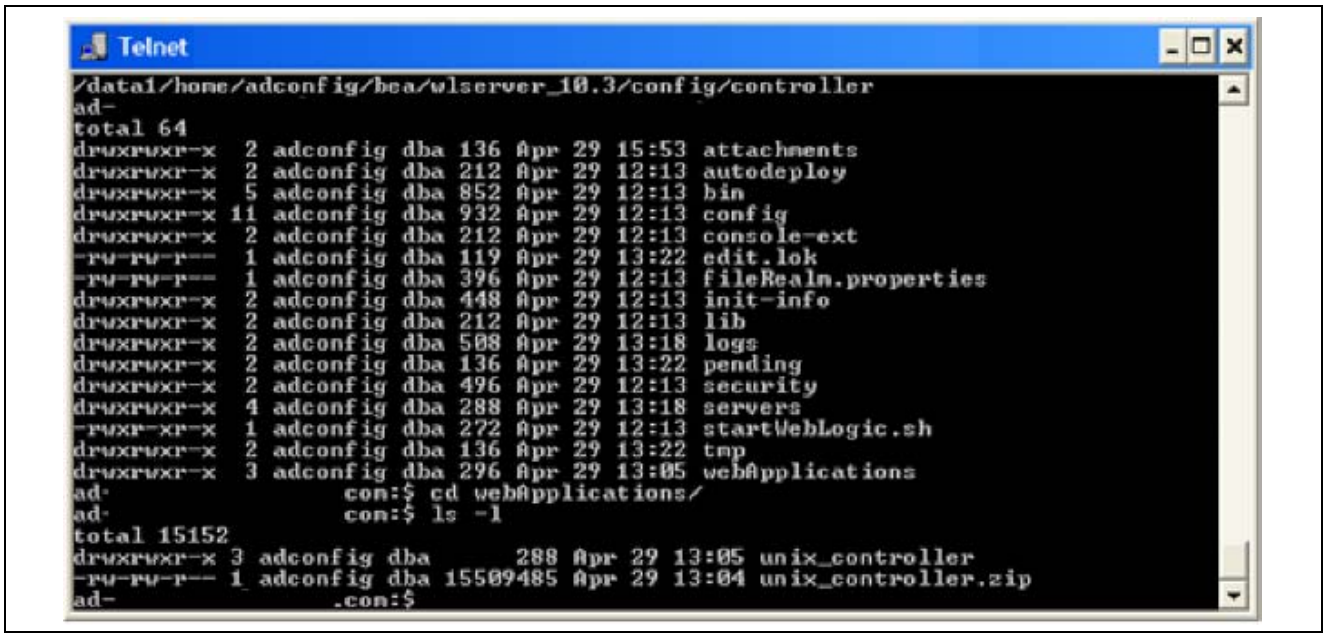


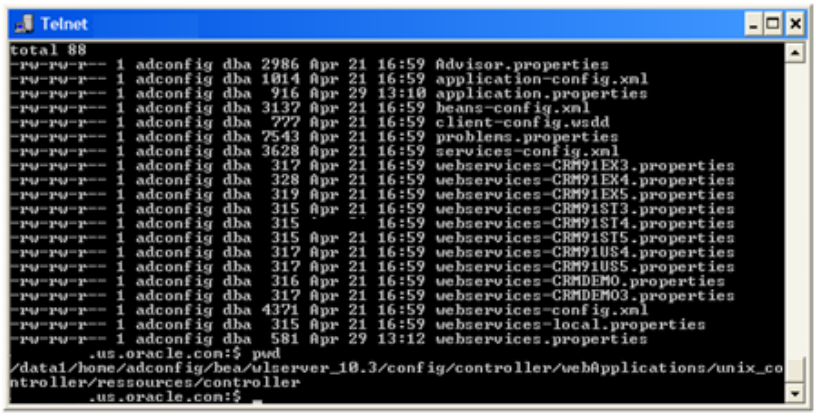
Oracle WebLogic Controller Configuration Wizard - Controller.war file copied to webApplications folder

3. Copy the *"resources"* folder from <*WEBLOGIC_HOME*>/config/CalicoDomain/install/controller/ to your <*ControllerDomain*>*/webApplications* folder.

Task 13-1-9: Modifying the Webservices Properties File (webservices.properties)

To modify the *webservices.properties* file that is found in the *ressources* folder:

1. Edit the *webservice.properties* file, found in: <*ControllerDomain*>/webApplications/ressources/controller, as shown in the following example:



Navigation example inside webservices.properties folders - properties files

2. Modify the IP address of all four of these entries with your PeopleSoft Gateway URL and Port, as shown in the following example:

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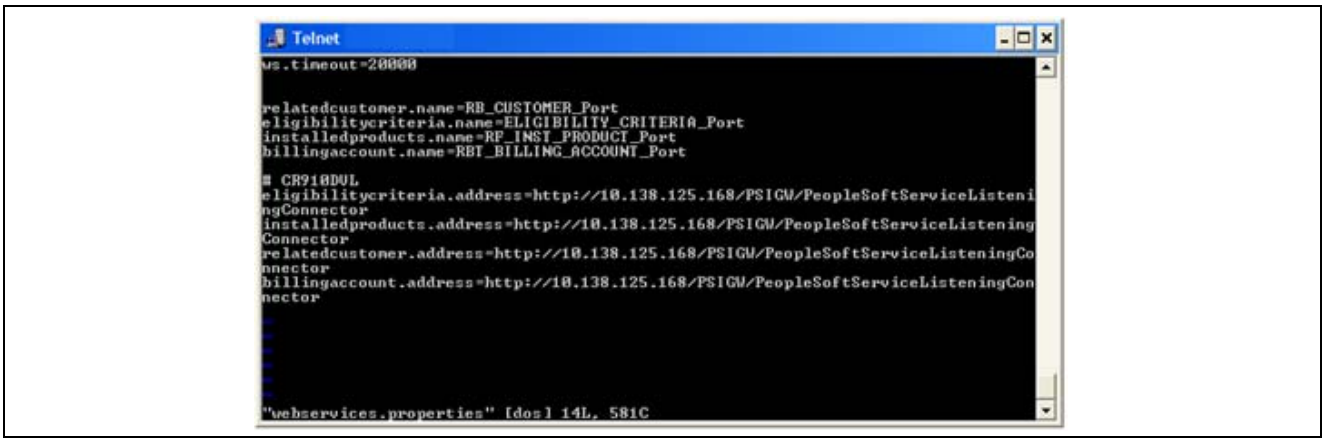
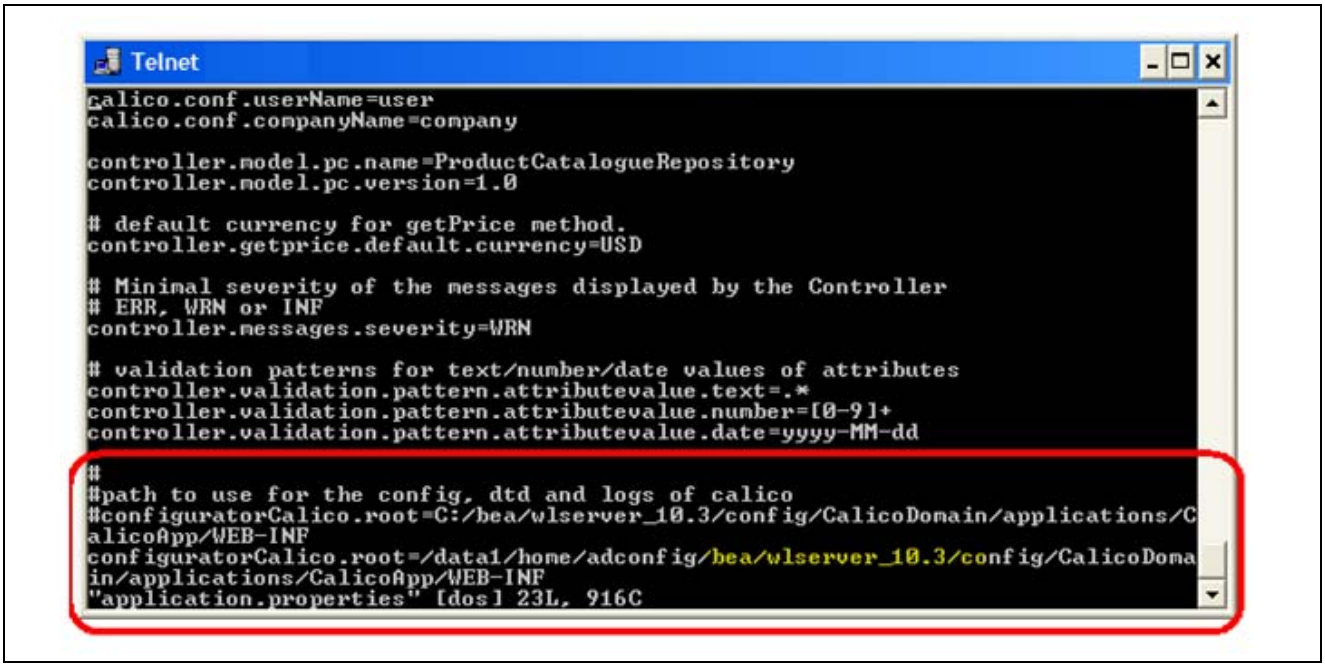


IP address example with four entries to modify

Task 13-1-10: Modifying the Application Properties File (application.properties)

To modify the *application.properties* file:

1. Edit the *application.properties* file, found in: <*ControllerDomain*>/webApplications/ressources/controller, as shown in the following example:



Example of application.properties files

2. Modify the *ConfiguratorCalico.root* path to point to your WEBLOGIC_HOME directory.

Note. If your Configurator is in a Microsoft Windows environment, ensure that you use the "/" convention like the example above when you modify the path.

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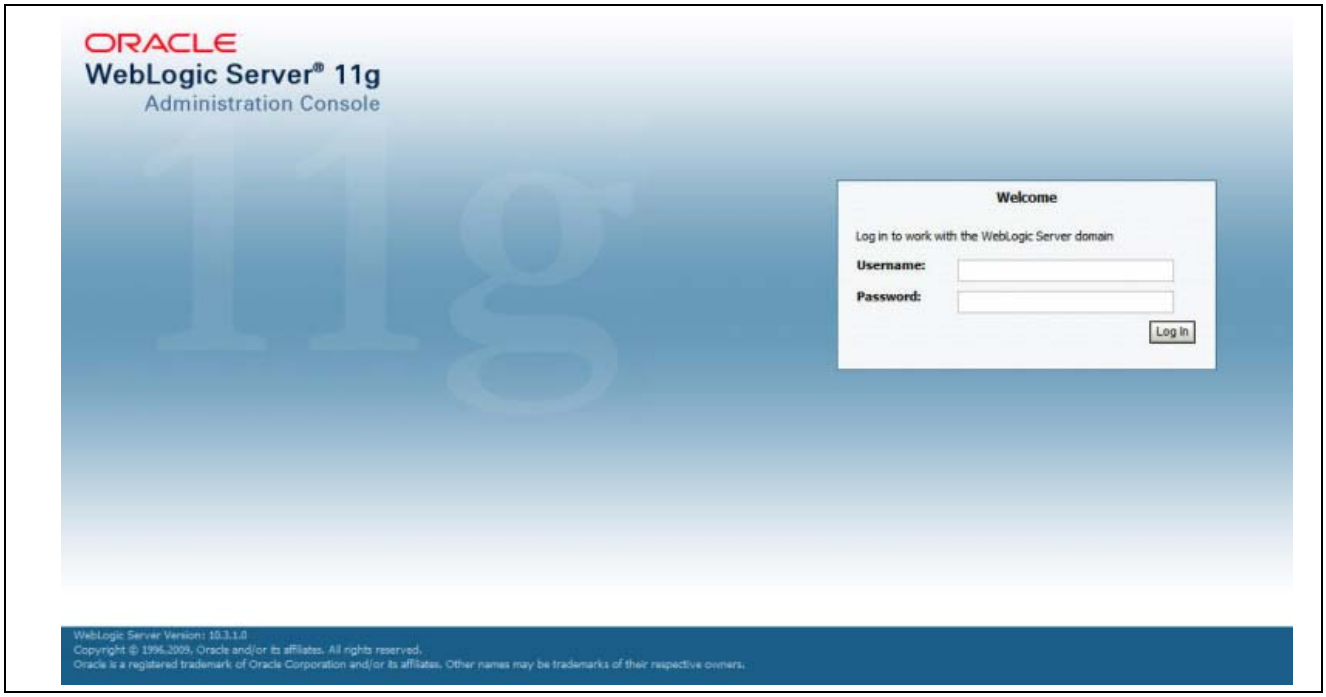
Task 13-1-11: Deploying the Oracle WebLogic Controller Application

To deploy the Oracle WebLogic Controller application:

1. Start the server, if it is not already started, by using the *startWeblogic.cmd* in your *ControllerDomain* directory.
2. Go to your weblogic console: *http://localhost:7001/console*

   Log in to the Oracle WebLogic Server Administration Console - Log In page using your own username and password, as shown in the following example:



Oracle WebLogic Server Administration Console - Log In page

Note. *7001* is the default port for the Controller application. Your port may vary, depending on your configuration.

---

3. On the Oracle WebLogic Administration Console page, click Deployments in your Domain Structure tree, and then click the Install button.
4. Navigate to and select the *controller.war* file that you previously placed in the <*ControllerDomain*> /webApplications directory, as shown in the following example:

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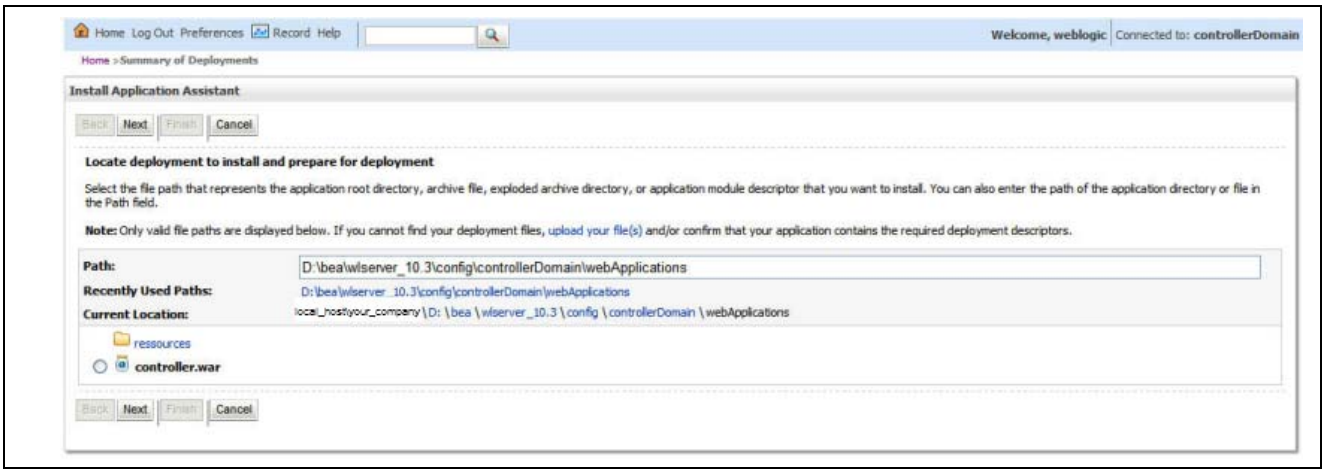
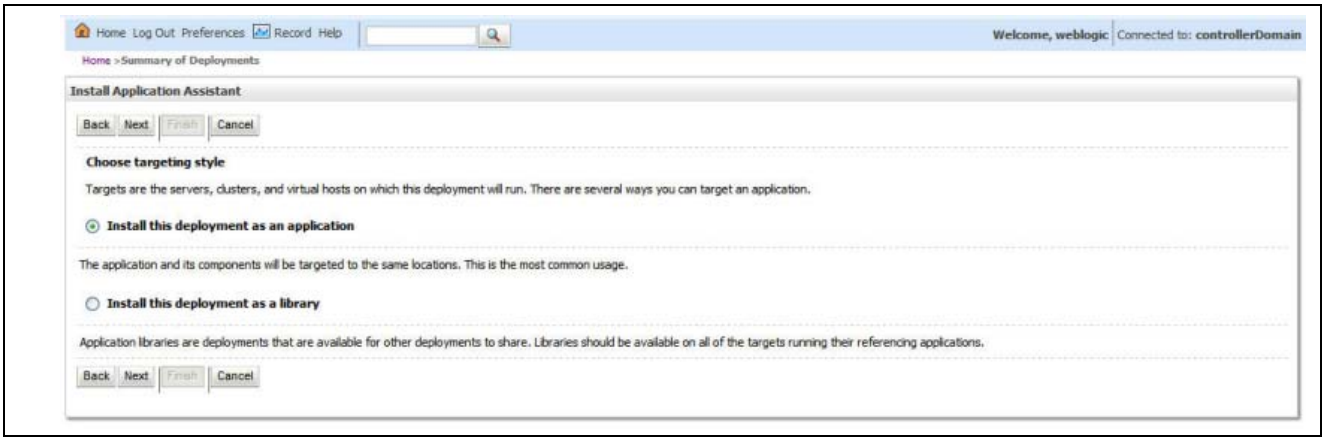


Install Application Assistant - Controller.war file option

5. Click Next. The Install Application Assistant page appears, as shown in the following example:



Install Application Assistant showing option Install this deployment as an application selected

6. Select the option Install this deployment as an application.
7. Click Next. The Install Application Assistant showing the defaults selected appears, as shown in the following example:

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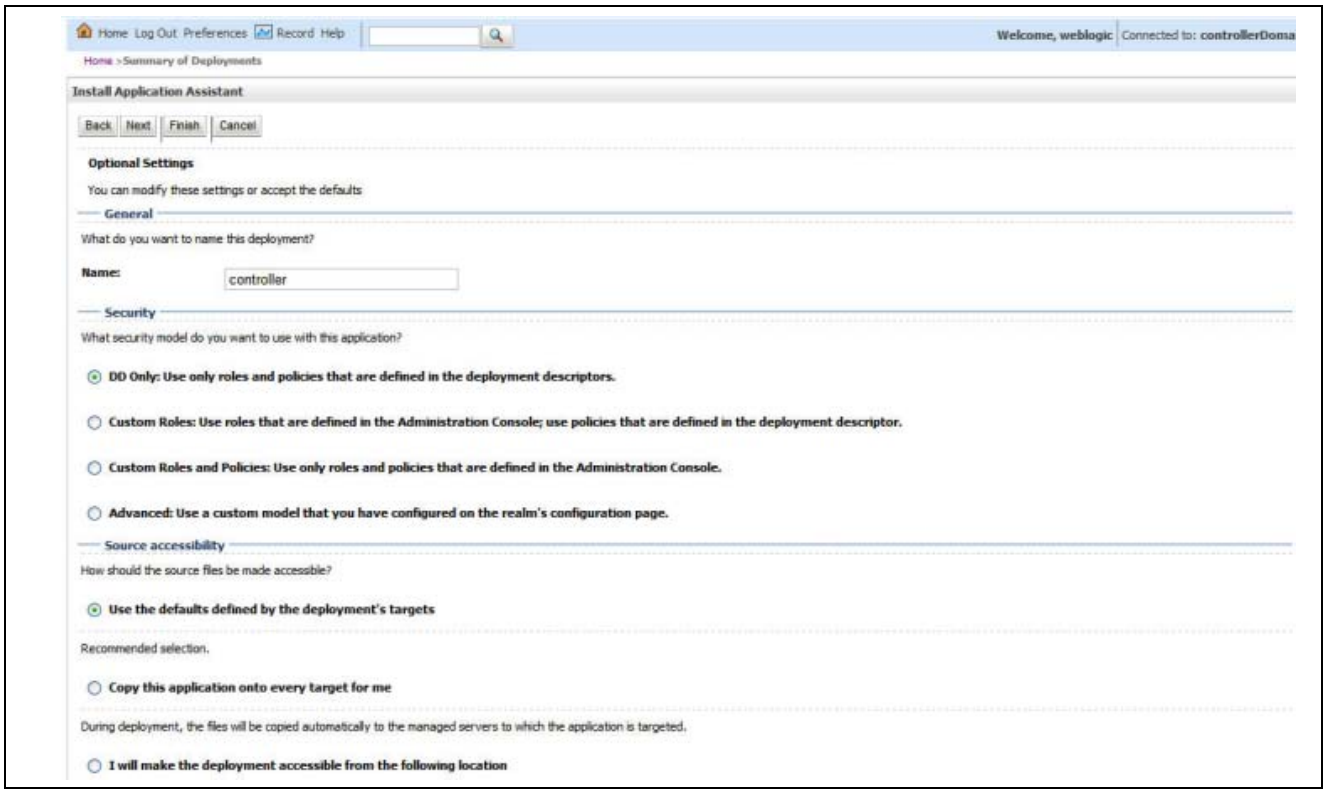
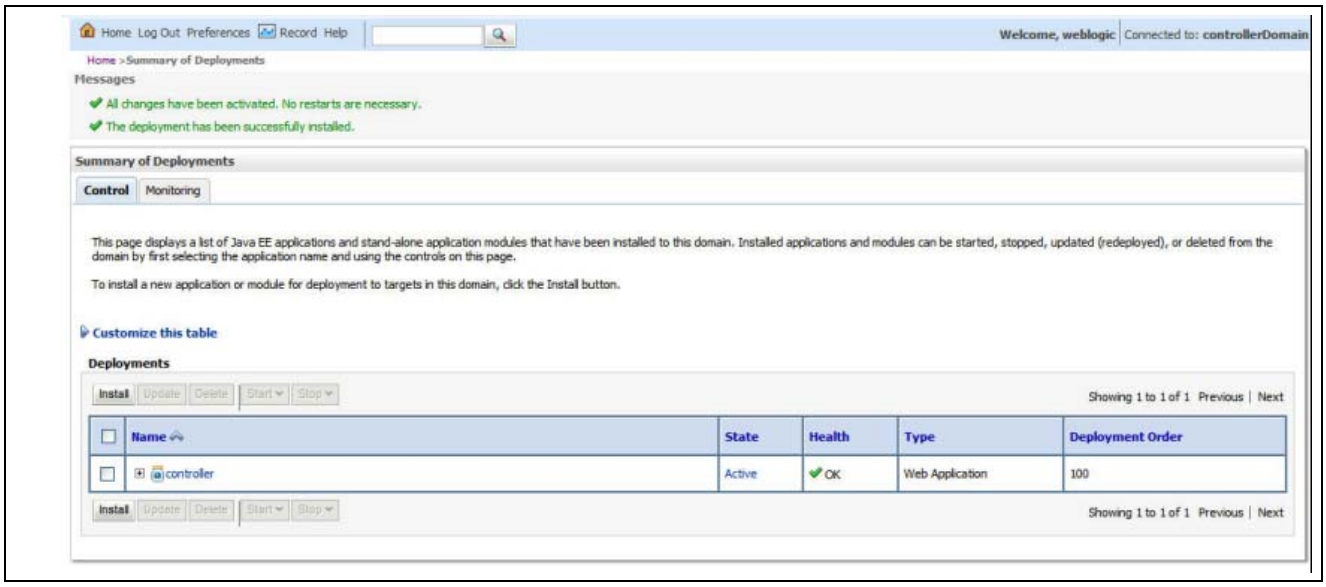


Install Application Assistant - default options selected

8. Accept all default options (development mode).
9. Click the Finish button.

   If your deployment is performed correctly, the Summary of Deployments page showing the correct details appears, as shown in the following example:



Summary of Deployments page

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Task 13-2: Installing the Oracle WebLogic Controller on Microsoft Windows

This section discusses:

- Installing the PeopleSoft Advanced Configurator
- Exporting the Configuration and Running the AE Program
- Installing the PeopleSoft Visual Modeler 9.1
- Updating JNDIDBName.properties
- Compiling the ProductCatalogueRepository Model
- Using Web Based Compilation for the Model
- Creating the Oracle WebLogic Controller Domain on Microsoft Windows
- Creating the WebApplications Folder Under the Controller Domain
- Modifying the Webservices Properties File (webservices.properties)
- Modifying the Application Properties File (application.properties)
- Deploying the Oracle WebLogic Controller Application

Task 13-2-1: Installing the PeopleSoft Advanced Configurator

Install the PeopleSoft Advanced Configurator server on your Microsoft Windows system. Detailed instructions for Microsoft Windows are included in the PeopleSoft Advanced Configurator 9.1 documentation that is included within this installation guide.

See "Installing the PeopleSoft Advanced Configurator 9.1"

This chapter appears earlier in this installation guide.

Verify that the PeopleSoft Advanced Configurator server is started by navigating to *http://<configurator server>:7777/.*

Task 13-2-2: Exporting the Configuration and Running the AE Program

To export the configuration and run the Application Engine (AE) program:

1. Login to PeopleSoft Pure Internet Architecture for the target PeopleSoft environment.
2. Select Set Up CRM, Product Related, Advanced Configurator, Export Configuration.
3. Click Add a new value. Enter a Run Control ID and click Add.

   The Export Product Definitions page appears.
4. Enter a value in the Request ID field.
5. Click the Run button to run the AE program (APC_PC_EXP) using the default settings, and then click OK.

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Task 13-2-3: Installing the PeopleSoft Visual Modeler 9.1

To install the PeopleSoft Visual Modeler:

See "Installing the PeopleSoft Advanced Configurator," Installing the PeopleSoft Visual Modeler 9.1.

Task 13-2-4: Updating JNDIDBName.properties

To update the JNDIDBName.properties:

1. Ensure that APC (PeopleSoft Advanced Configurator) Server instance is not running; shut down the server.
2. Set up the APC (PeopleSoft Advanced Configurator) database connection by editing the file <*WEBLOGIC_HOME*>\Config\CalicoDomain\applications\CalicoApp\WEB-INF\config\JNDIDBName.properties.

   The JNDIDBName.properties file should look similar to this example:

```
# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database⇒
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
db2db.url=jdbc:db2://[HostName]:[PortNumber]/[DatabaseName]
db2db.driver=com.ibm.db2.jcc.DB2Driver
db2db.username=[username]
db2db.password=[password]

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4
```

3. Edit the values of the database platform for your respective database:

```
For SQL Server: replace sqldb with your Sql Server database name.
For Oracle: replace oraceldb with your Oracle database name.
For DB2: replace db2db with your DB2 database name.


Replace the url settings for your platform with your appropriate values.
Replace [username] for your platform with your database owner ID.
```


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```
Replace [password] for your platform with your database owner ID password.
```

The PSCFG settings should already be configured based on the settings that you entered during the installation of the APC (PeopleSoft Advanced Configurator) server. The PSCFG settings should match the database settings that you just modified for your respective platform.

4. The following JNDIDBName.properties file is an example after it has been modified for a DB2 database:

```
# example for setting up a SQL server database with MicroSoft driver
# SQL server default PortNumber is 1433
sqldb.url=jdbc:sqlserver://[ServerName]:[PortNumber];DatabaseName=[Database⇒
Name];sql70=true;charset=Cp1252
sqldb.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
sqldb.username=[username]
sqldb.password=[password]

# example for setting up an Oracle database with Oracle driver
# Oracle default PortNumber is 1521
oracledb.url=jdbc:oracle:thin:@[HostName]:[PortNumber]:[OracleSID]
oracledb.driver=oracle.jdbc.OracleDriver
oracledb.username=[username]
oracledb.password=[password]

# example for setting up a DB2 database with the Weblogic driver
CR91USHP.url=jdbc:db2://ui-lnx09:60003/CR91USHP
CR91USHP.driver=com.ibm.db2.jcc.DB2Driver
CR91USHP.username=upgtest4
CR91USHP.password=upgtest4

PSCFG.username=upgtest4
PSCFG.driver=com.ibm.db2.jcc.DB2Driver
PSCFG.url=jdbc:db2://ui-lnx09:60003/CR91USHP
PSCFG.password=upgtest4
```

5. After you complete the modifications, restart the APC (PeopleSoft Advanced Configurator) server instance.

Task 13-2-5: Compiling the ProductCatalogueRepository Model

To compile the *ProductCatalogueRepository* model with the PeopleSoft Visual Modeler, perform these steps:

1. Start the PeopleSoft Visual Modeler 9.1 application.

   Close the dialog box upon startup if it appears.

2. Click File, Open Workspace. Open the model's workspace file.

   The location of this file is :

   <*WEBLOGIC_HOME*>\config\CalicoDomain\install\controller\ViM-model\<*MODEL_TYPE*>\ProductCatalogueRepository\ProductCatalogueRepository.csw

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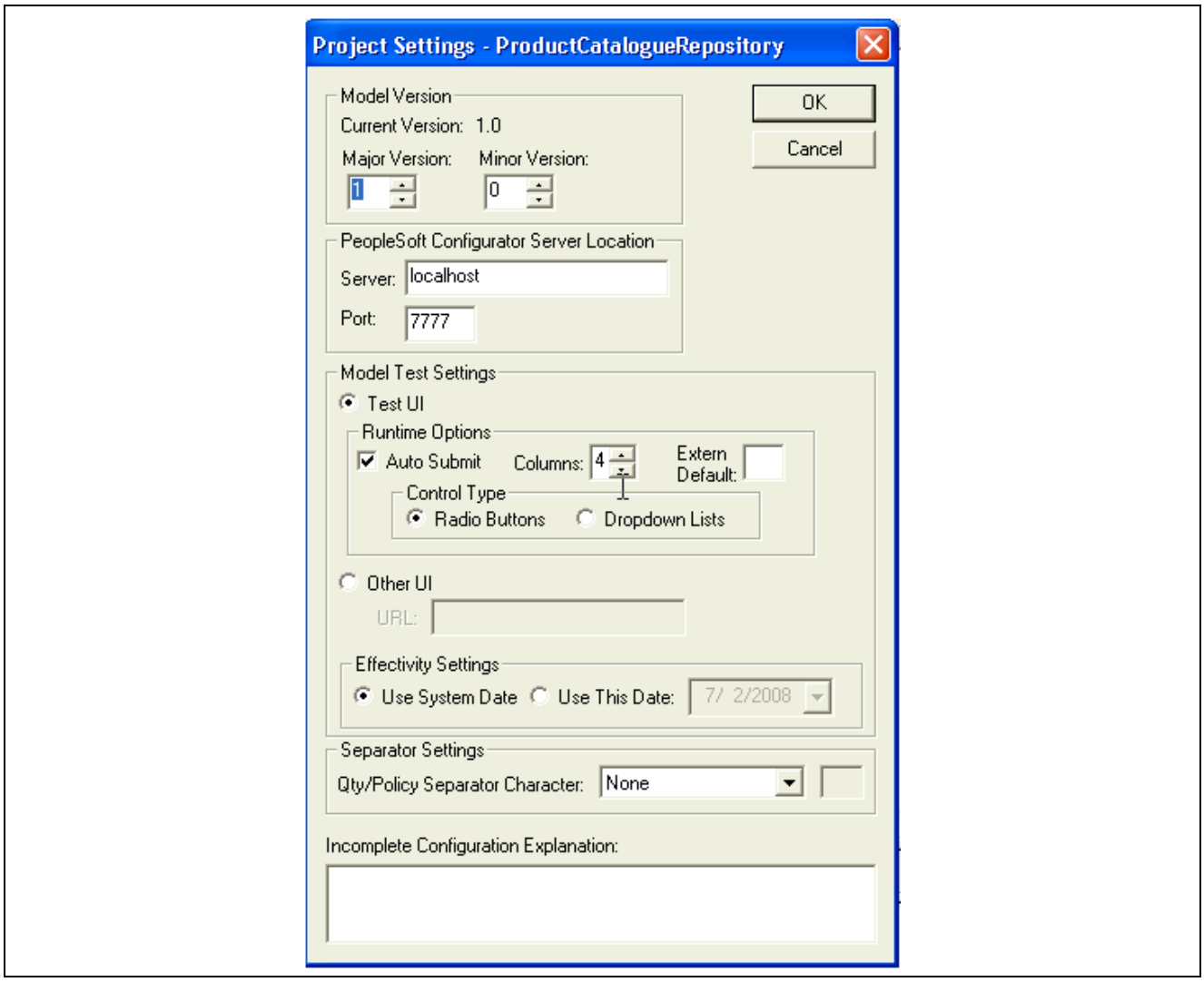
Note. The <*MODEL_TYPE*> depends on what you are installing. The models are contained in these folders:

For DB2 and MSS, access the *mss_2008* directory.

For Oracle, access the *oracle* directory.

3. A database connection dialog box appears. Enter your database connection information, and then click the Retry button.
4. From the menu, select Project, Settings to open the Project Settings dialog box.
5. Define the PeopleSoft Configurator Server Location with the proper values that point to the APC (PeopleSoft Advanced Configurator) server instance.

   The following is an example of the Project Settings - Product Catalogue Repository dialog box showing example settings:



Project Settings - Product Catalogue Repository

6. Click OK to save the settings.

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7. Click the Compile icon (hover to locate the *Compile the model* icon) on the PeopleSoft Visual Modeler menu.
8. Verify that you receive no errors. Warnings are okay.

   These warnings are due to related language entry and can be ignored.

Task 13-2-6: Using Web Based Compilation for the Model

To compile the model using the web:

1. Access the PeopleSoft Advanced Configurator Server by navigating to *http://<configurator server>:7777/*
2. Click the Administration link to view the details and timestamp of the model that you just compiled.
3. Click the Browse button to locate and select the XML file from the ProductCatalogueRepository.

   It is important that you select the latest precompiled XML file. For example: C:\<*WEBLOGIC_HOME*> \config\CalicoDomain\applications\CalicoApp\WEB-INF\models\ProductCatalogueRepository\1\0\0 \20090422-154308-530\XML
4. Select the Generate self-contained model check box.
5. Click the Compile Model button.
6. Verify that you received the message “Model compilation completed successfully.”

Task 13-2-7: Creating the Oracle WebLogic Controller Domain on Microsoft Windows

Create a new Oracle WebLogic domain using Oracle’s Fusion Middleware Configuration Wizard:

1. From your Start menu, select Programs, Oracle WebLogic, WebLogic Server 11gR1, Tools, Configuration Wizard, as shown in the following example that shows the navigation path to Oracle’s Fusion Middleware Configuration Wizard:

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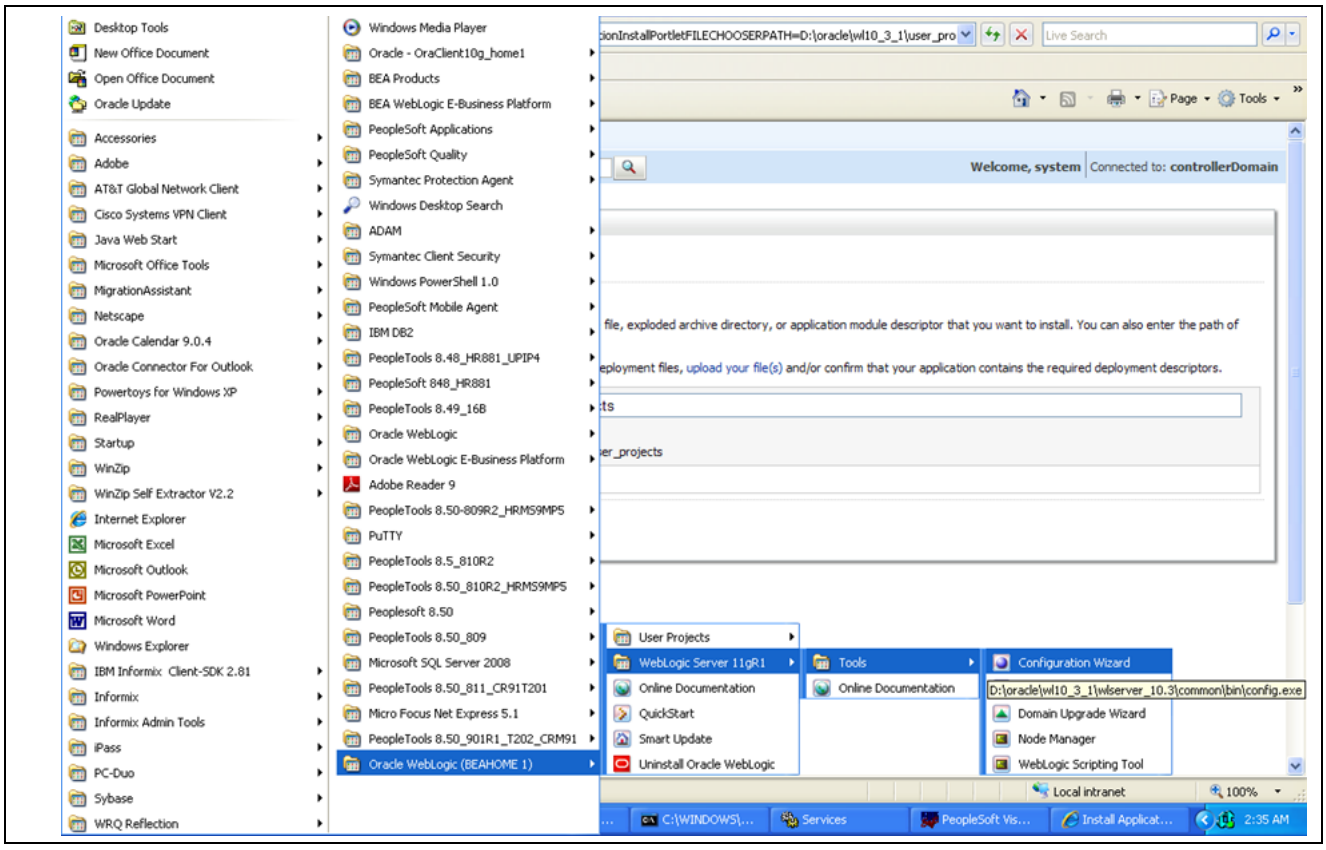

Path to Oracle's Fusion Middleware Configuration Wizard

The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:

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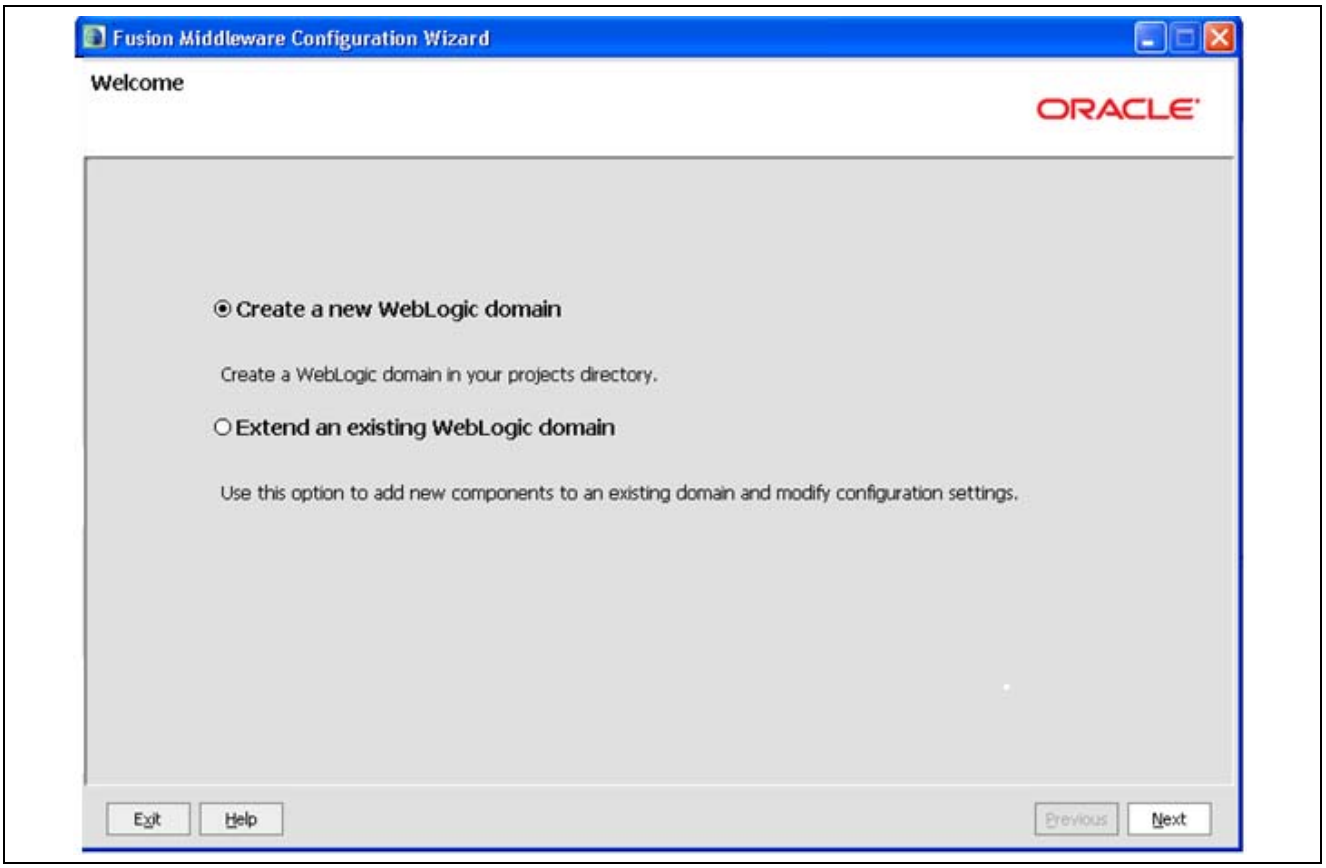

Fusion Middleware: Configuration Wizard - Welcome page

2. On the Fusion Middleware Configuration Wizard Welcome page, select the Create a new WebLogic domain option.
3. Click Next.

   The Fusion Middleware Configuration Wizard - Select Domain Source page appears, as shown in the following example:

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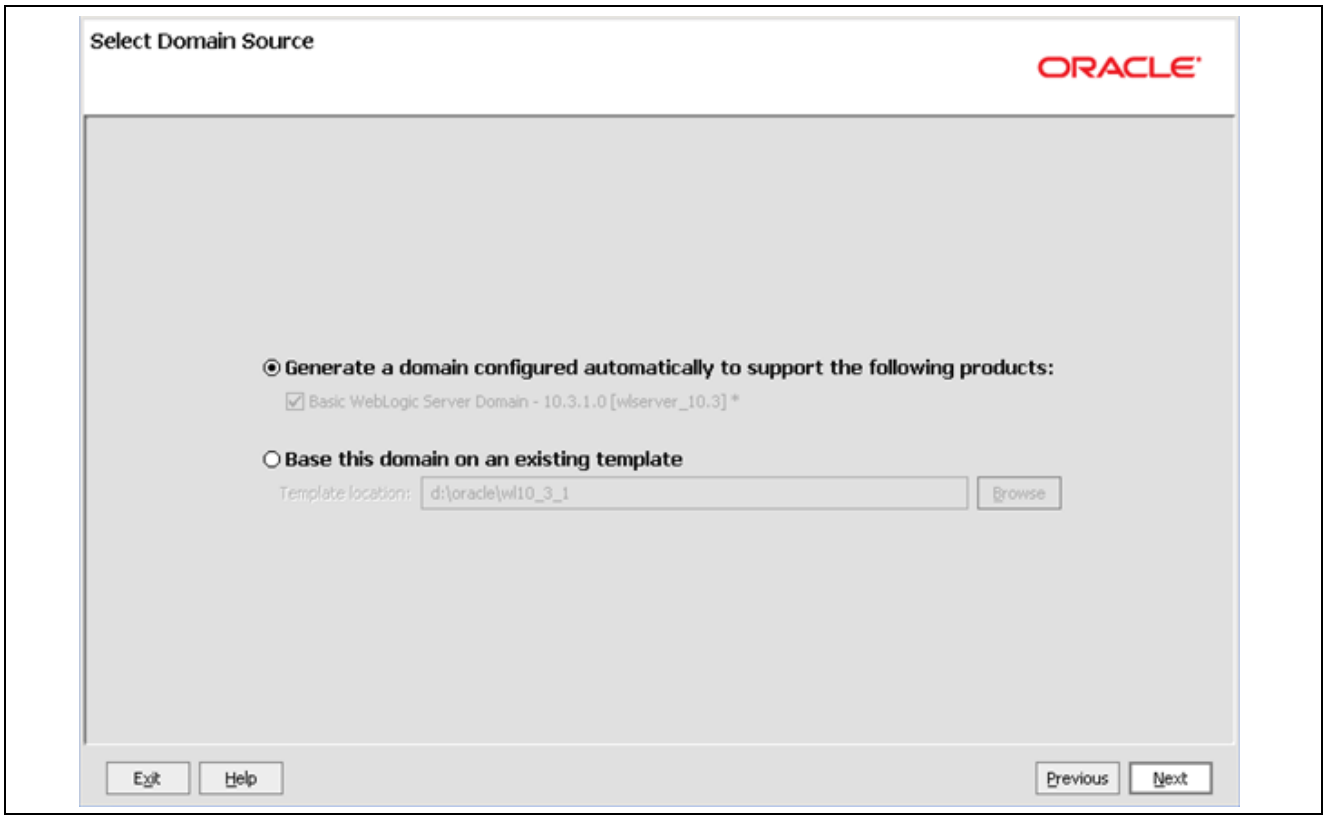

Fusion Middleware: Configuration Wizard - Select Domain Source page

4. On the Fusion Middleware Configuration Wizard - Select Domain Source page, select the Generate a domain configured automatically to support the following products option, and then select the WebLogic Server check box.
5. Click Next.

   The Fusion Middleware Configuration Wizard - Create WebLogic Domain page appears, as shown in the following example:

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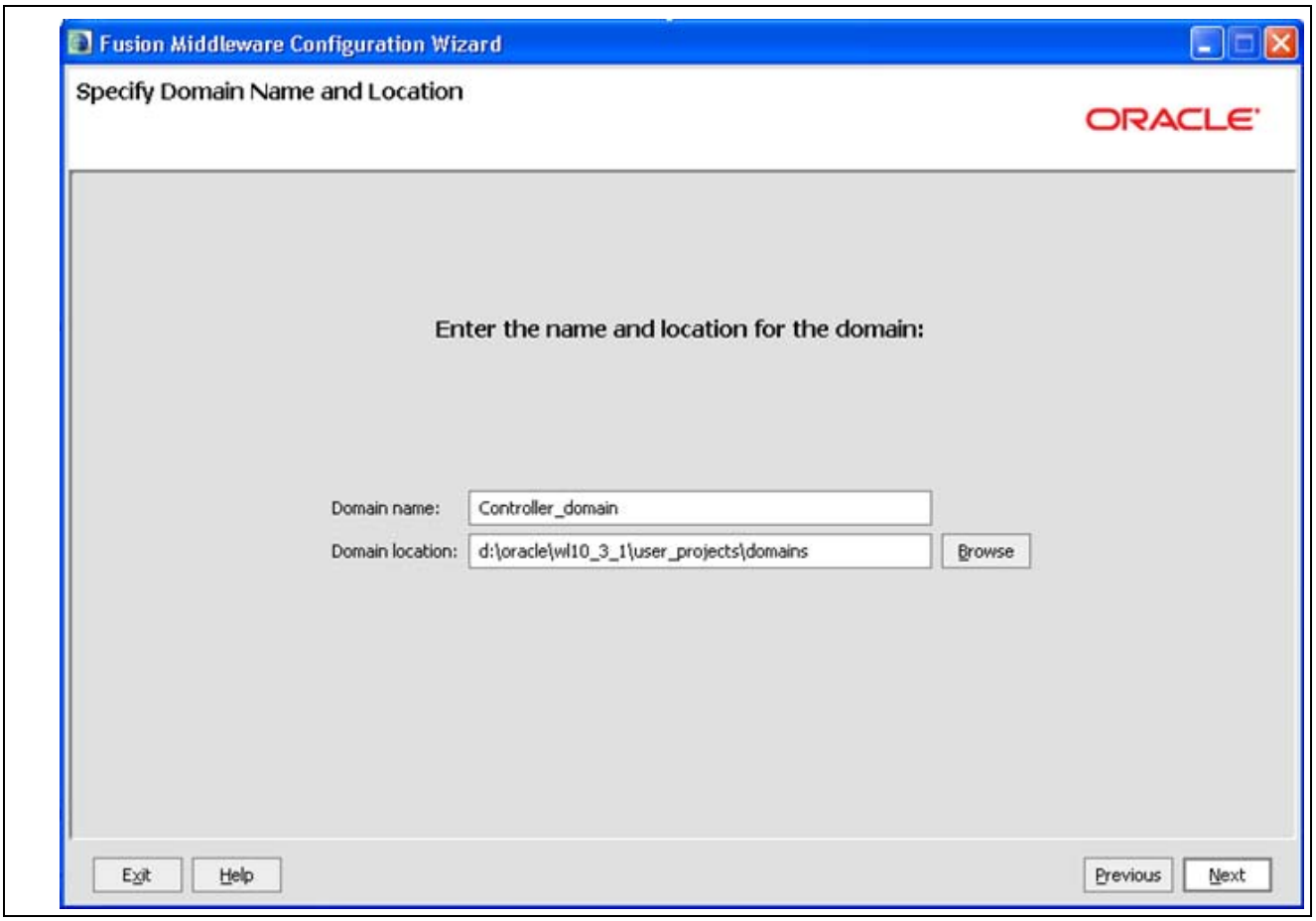

Fusion Middleware Configuration Wizard - Create WebLogic Domain page

6. Enter the domain name that you want and the domain location.

   In this example, *Controller_domain* is entered in the Domain name field and *d:\oracle\wl10_3_1\user_projects\domains* is entered in the Domain location field.

7. Click Next. The Fusion Middleware Configuration Wizard - Configure Administrator Username and Password page appears, as shown in the following example:

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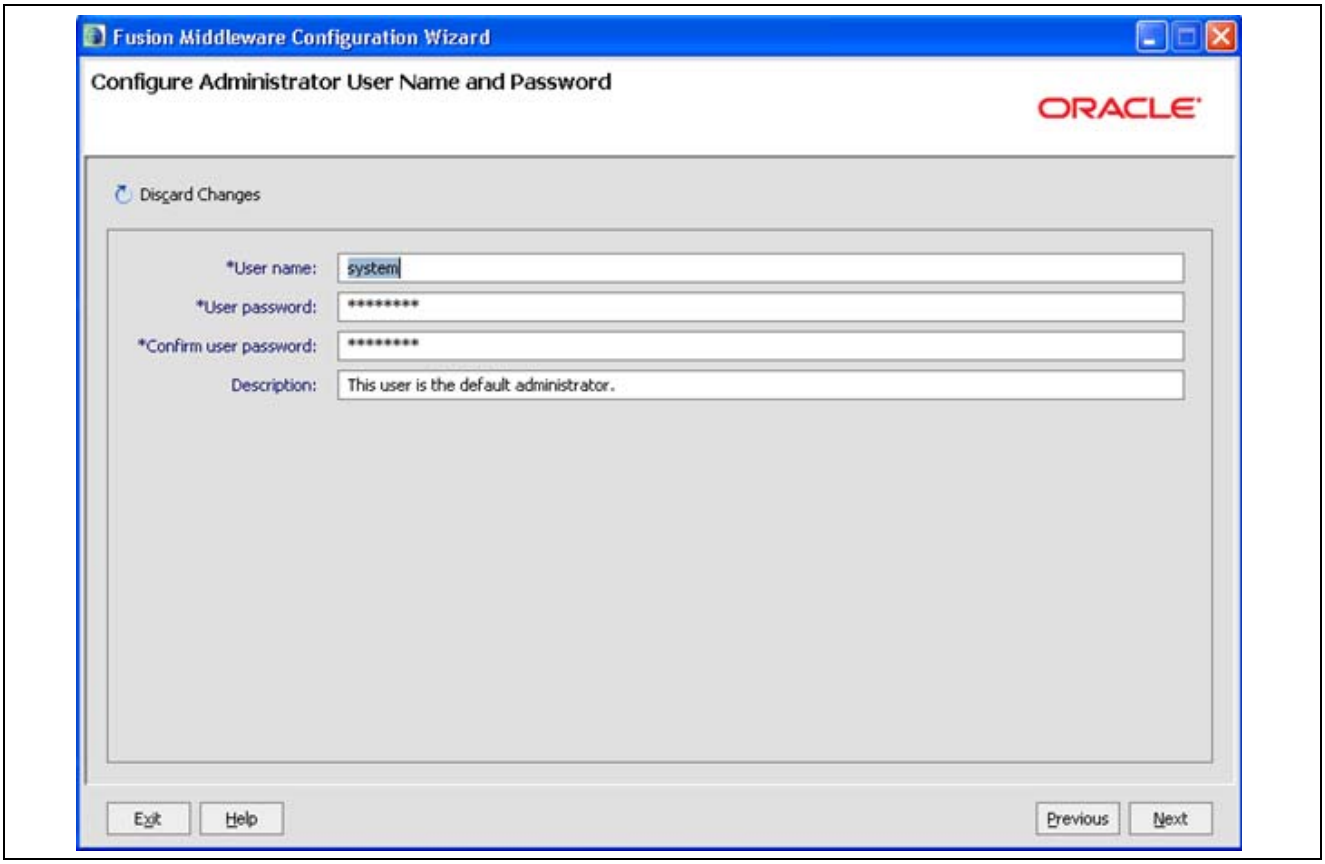

Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page

8. Enter your administrator username and password.
9. Click Next.

   The Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page appears, as shown in the following example:

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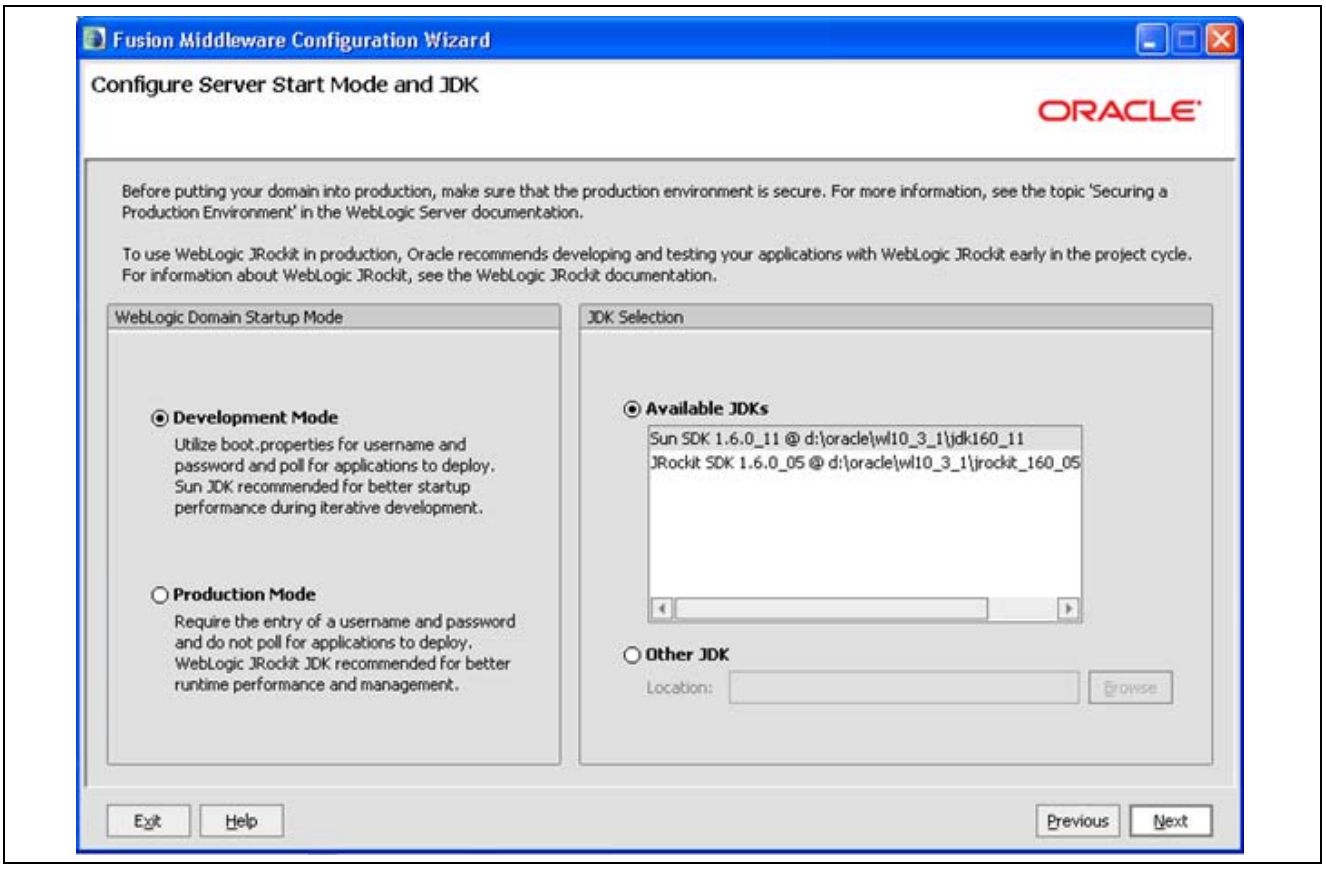

Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page

10. On the Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page, in the WebLogic Domain Startup Mode section, select either the Development Mode option or the Production Mode option, depending on your intended final use of this domain.

    In this example, the Development Mode option is selected and a development platform will be installed.

11. In the JDK Selection section, select the Available JDKs option, and then select *JDK 1.6*.

12. Click Next.

    The Fusion Middleware: Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:

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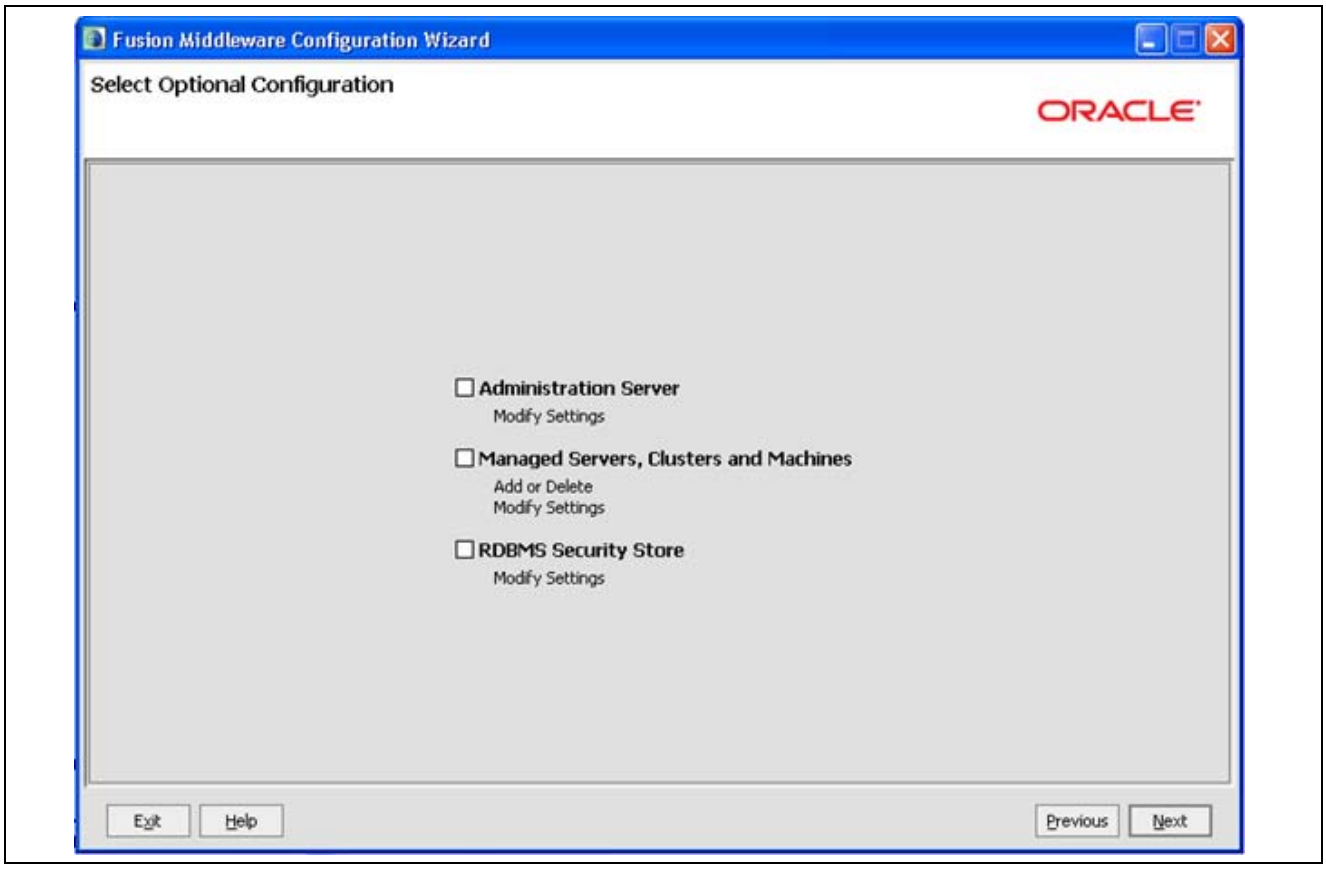

Fusion Middleware: Configuration Wizard - Select Optional Configuration page

13. On the Fusion Middleware: Configuration Wizard - Select Optional Configuration page, select the configuration that you want.

    Additional configuration pages may appear, depending on your selections. Enter your appropriate values in those pages.

14. Click Next.

    The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:

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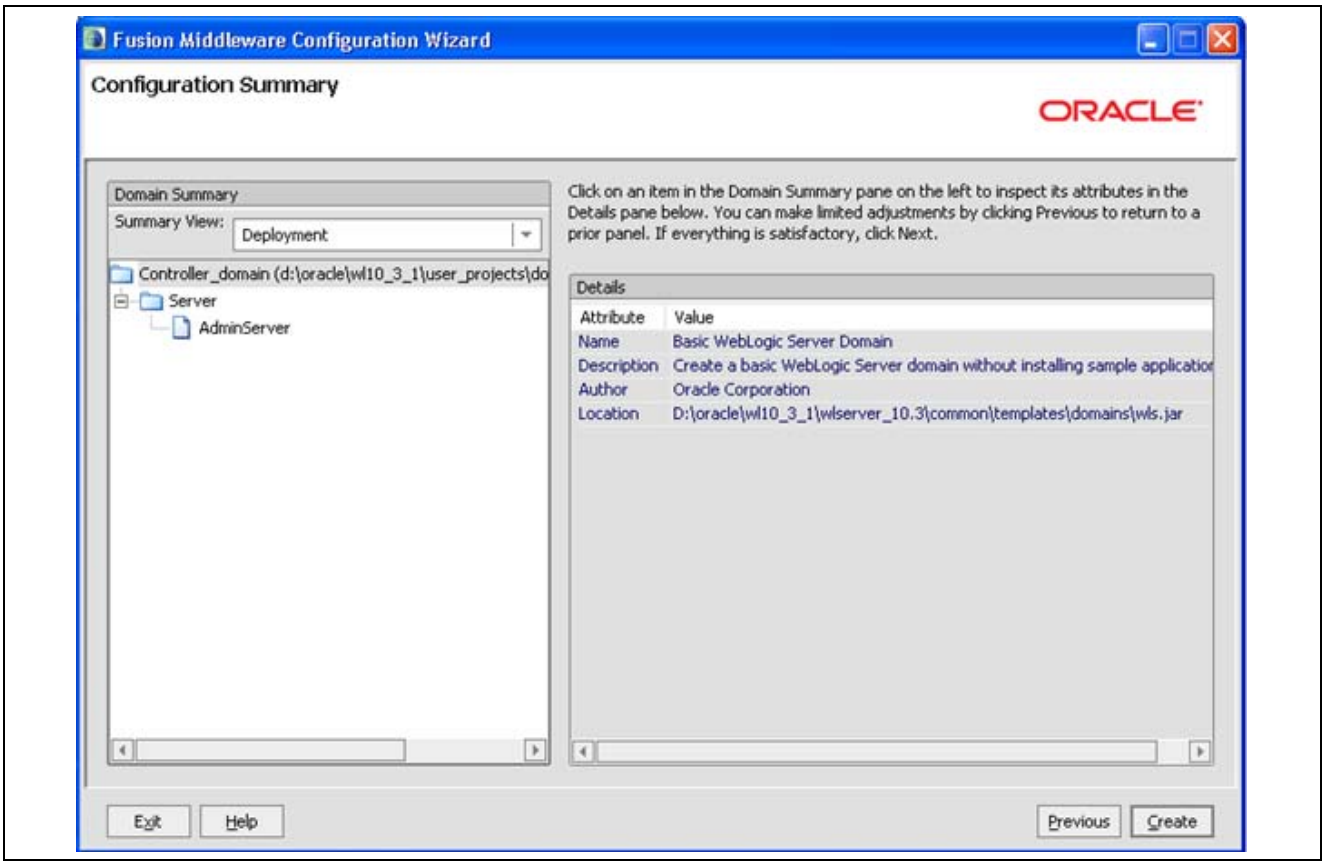

Fusion Middleware Configuration Wizard - Configuration Summary page

15. Review your configuration, and then click the Create button.

    The Fusion Middleware Configuration Wizard - Creating Domain page appears and shows you the progress of the domain creation.

16. On the Fusion Middleware Configuration Wizard - Creating Domain page, select the Start Admin Server check box, and then click Done.

17. To start or stop this domain yourself at a later time, go to the Domain Location (this path displays on the Fusion Middleware Configuration Wizard - Creating Domain page while in progress and is the location that you specified on the Fusion Middleware Configuration Wizard - Create WebLogic Domain page), and enter the command *startWebLogic.cmd*.

Task 13-2-8: Creating the WebApplications Folder Under the Controller Domain

To create the WebApplications folder under the Oracle WebLogic Controller Domain:

1. Under your newly created Controller domain, create a new folder named *webApplications*, as shown in the following example:

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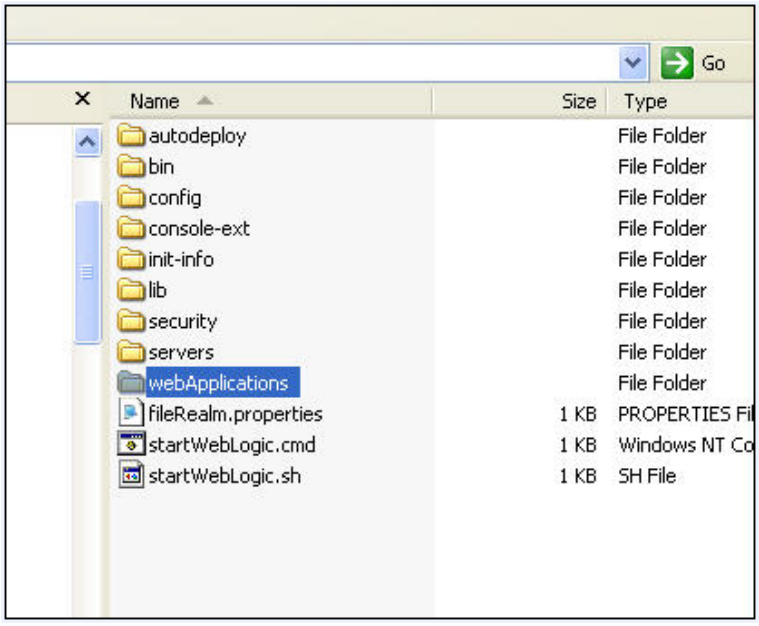

Controller domain - webApplications folder

2. Copy the *controller.war* file from <*WEBLOGIC_HOME*>\config\CalicoDomain\install\controller to your <*ControllerDomain*>\webApplications folder.
3. Copy the "*ressources*" folder from <*WEBLOGIC_HOME*>\config\CalicoDomain\install\controller\ to your <*ControllerDomain*>\webApplications folder.

Task 13-2-9: Modifying the Webservices Properties File (webservices.properties)

To modify the *webservices.properties* file:

1. Edit the *webservice.properties* file, found in: <*ControllerDomain*>\webApplications\ressources\controller
2. Modify the IP address of all four of the URL entries (listed in the *webservices.properties* file) with your PeopleSoft Gateway URL and Port.

Task 13-2-10: Modifying the Application Properties File (application.properties)

To modify the *application.properties* file:

1. Edit the *application.properties* file, found in: <*ControllerDomain*>\webApplications\ressources\controller:
2. Modify the *configuratorCalico.root* path to point to your WEBLOGIC_HOME directory.

```
# ORCL_SAMPLE
#path to use for the config, dtd and logs of calico
configuratorCalico.root=C:/bea/wlserver_10.3/config/CalicoDomain/applications⇒
/CalicoApp/WEB-INF
configuratorCalico.server=weblogic
```


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Note. If your configurator is in a Microsoft Windows environment, ensure that you use the "/" convention like the example above when you modify the path.

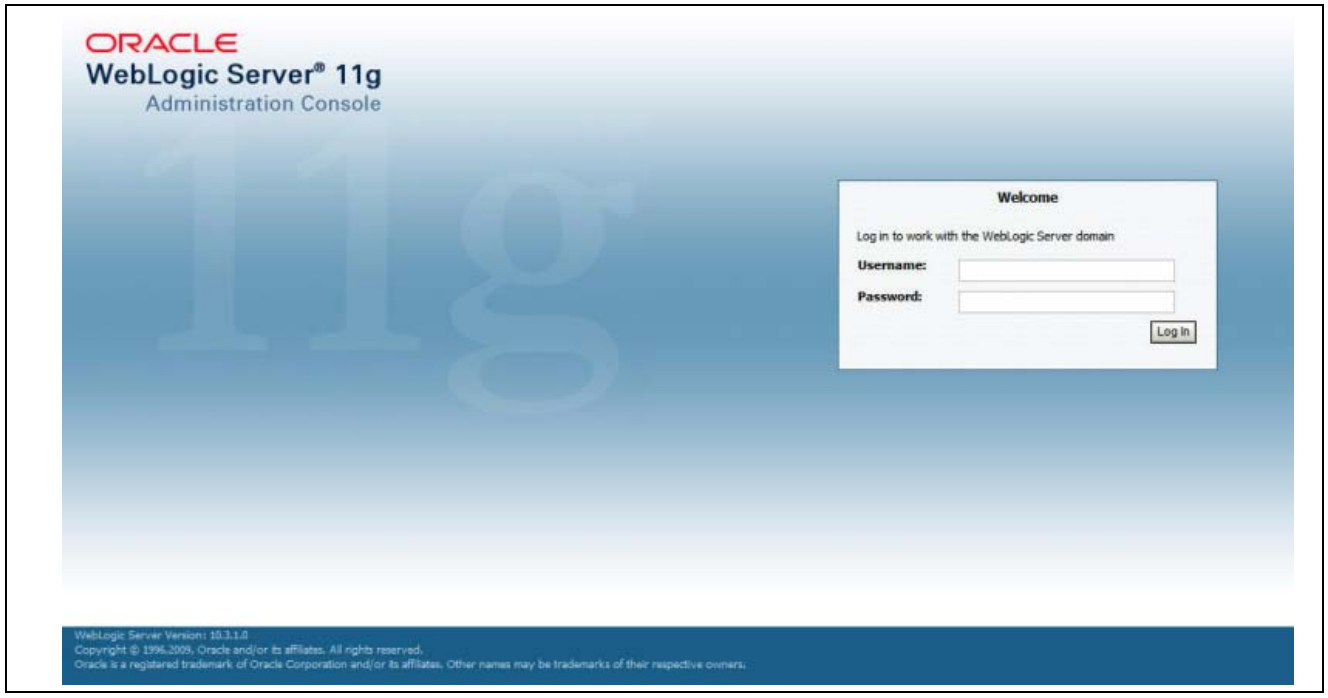
Task 13-2-11: Deploying the Oracle WebLogic Controller Application

To deploy the Oracle WebLogic Controller application:

1. Start the server, if it is not already started, using the *startWeblogic.cmd* in your *ControllerDomain* directory.
2. Go to your Oracle WebLogic Server Administration Console: *http://localhost:7001/console*

   Note. *7001* is the *default* port for the Controller application. Your port value may vary, depending on your configuration.

   Log in to the Oracle WebLogic Administration Console, as shown in the following example:



Oracle WebLogic Server Administration Console - Log In page

3. On the Oracle WebLogic Administration Console page, click Deployments in your Domain Structure tree, and then click the Install button.
4. Navigate to and select the *controller.war* file that you previously placed in the <*ControllerDomain*> \webApplications directory, as shown in the following example:

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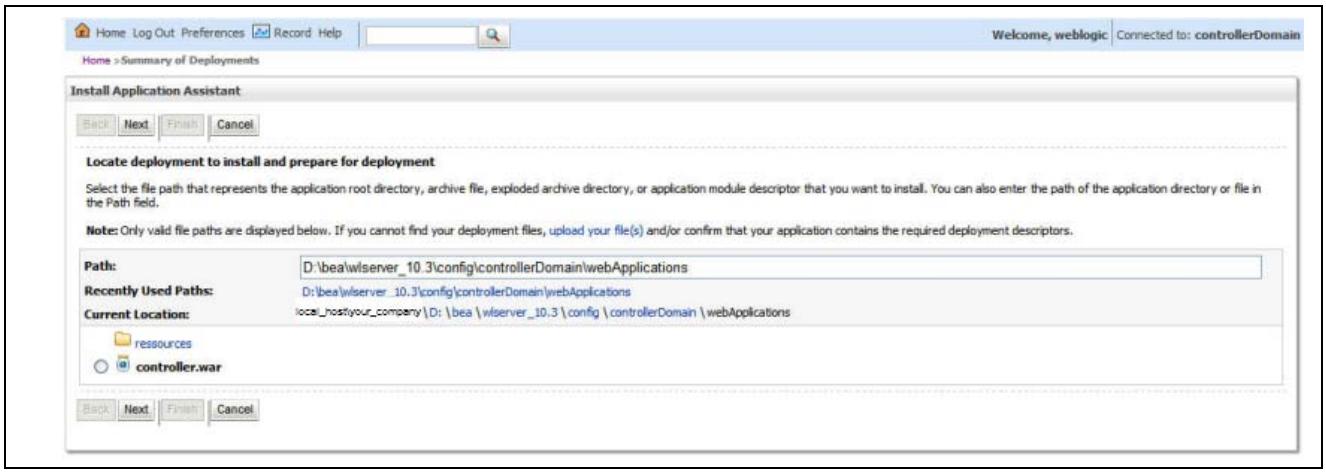
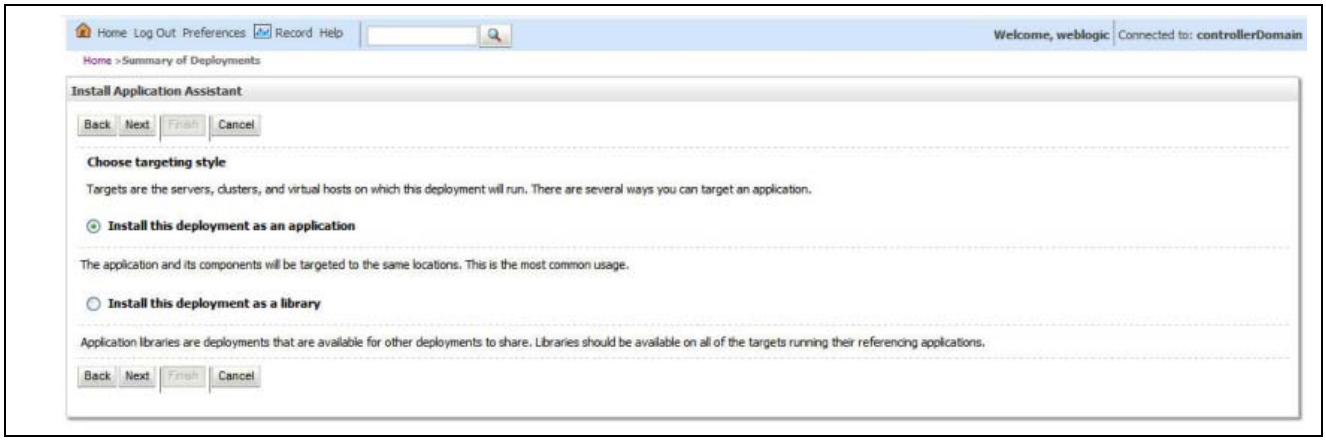


Install Application Assistant - controller.war file option selected

5. Click Next. The Install Application Assistant showing the option Install this deployment as an application appears, as shown in the following example:



Install Application Assistant - Install this deployment as an application option selected

6. Select the option Install this deployment as an application.
7. Click Next. The Install Application Assistant showing the default options selected appears, as shown in the following example:

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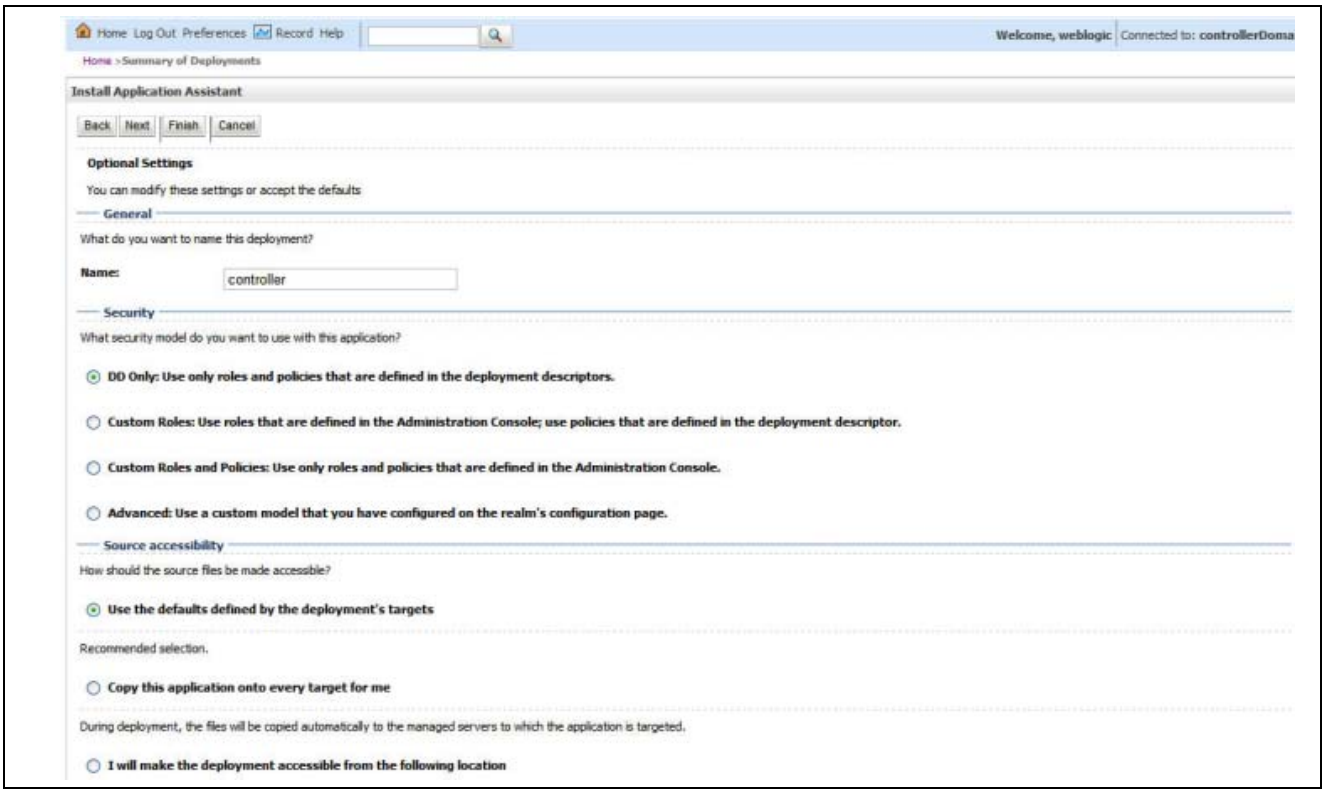
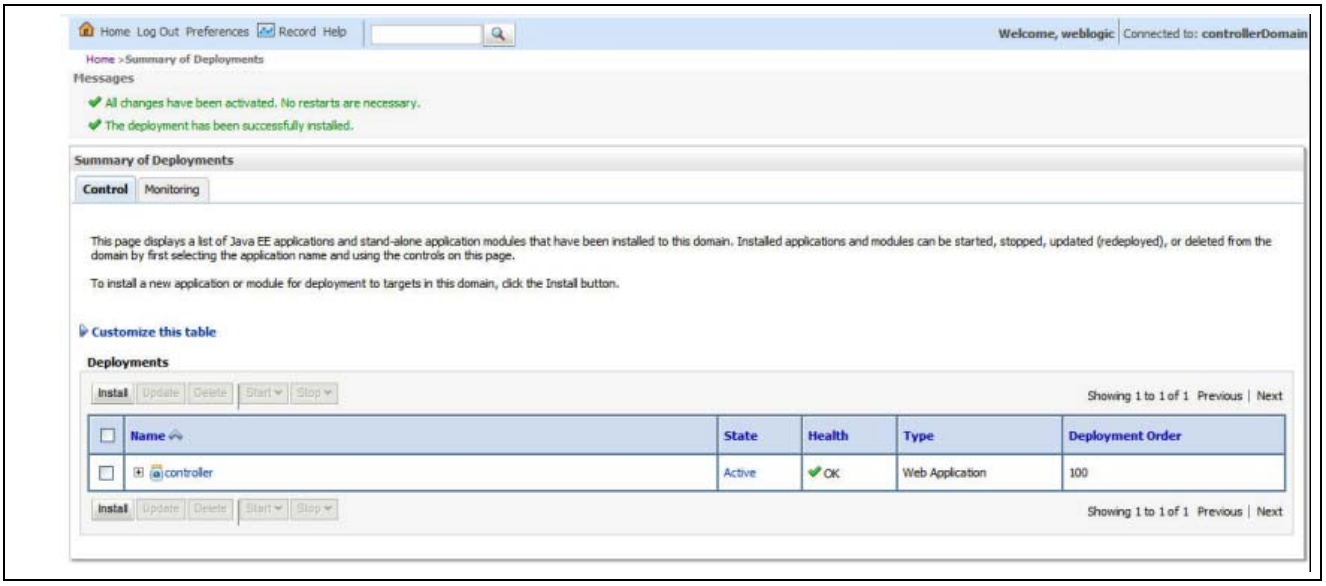


Install Application Assistant - Default options selected

8. Accept all default options (development mode).
9. Click the Finish button.

   If your deployment is performed correctly, the Summary of Deployments page showing the correct details appears, as shown in the following example:



Summary of Deployments page

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Task 13-3: Configuring and Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

This section discusses:

- Configuring the Configurator Connection on PeopleSoft Pure Internet Architecture
- Activating Web Services Required for the Controller
- Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

Task 13-3-1: Configuring the Configurator Connection on PeopleSoft Pure Internet Architecture

To set up and configure the PeopleSoft Advanced Configurator connection on PeopleSoft Pure Internet Architecture:

1. Log in to the front end (PeopleSoft Pure Internet Architecture) of the target PeopleSoft environment.
2. Select PeopleTools, Integration Broker , Integration Setup, Nodes.
3. Search for and open the *PSFT_CFG_APC* node.
4. Click the Connectors tab to access the Connectors page.
5. Edit the property with the Property ID that equals PRIMARYURL *http://<WLCONTROLLER_IP:PORT> /Configurator/com/oracle/ps/gui/jpf/begin.do?ping=true* by substituting *<WLCONTROLLER_IP:PORT>* with the IP and Port of the newly created WebLogic ControllerDomain.

   Note. Ensure that you enter your *Controller* port number here, *not* your Configurator port number. This is true for the remainder of this task.

6. Click Save. Click the Ping Node button to verify that it returned a success message.
7. Select PeopleTools, Integration Broker, Integration Setup, Services.
8. Search for and open the service named *VALIDATORSERVICE*.
9. Edit the Namespace field:

   http://<WLCONTROLLER_IP:PORT>/Configurator/services/Validation by substituting *<WLCONTROLLER_IP:PORT>* with the IP and Port of the newly created WebLogic ControllerDomain.
10. Click Save.
11. Click OK.
12. Select PeopleTools, Integration Broker , Integration Setup, Routings.
13. Search for the routing using the Routing Name: *~IMPORTED~29755*
14. Select the Connector Properties tab to access the Connector Properties page.
15. Edit the PRIMARYURL property : *http://<WLCONTROLLER_IP:PORT>/Configurator/services /Validation* by substituting *<WLCONTROLLER_IP:PORT>* with the IP and Port of the newly created WebLogic ControllerDomain.
16. Click Save.
17. Click OK.

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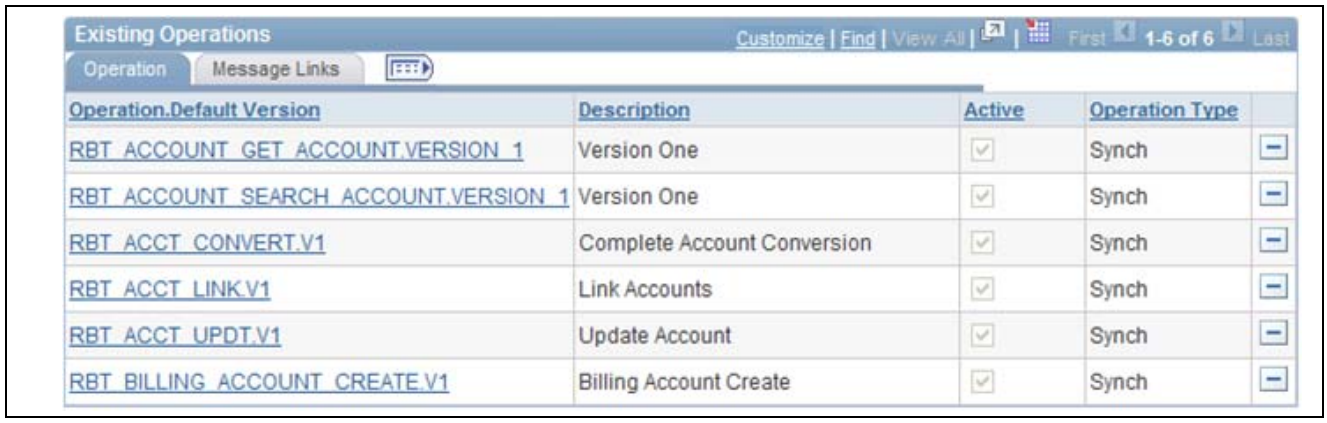
Task 13-3-2: Activating Web Services Required for the Controller

The Oracle WebLogic Controller exchanges data with PeopleSoft Pure Internet Architecture by way of web service request/response messaging. You must activate these web services to avoid errors during the Oracle WebLogic Controller session. These required web services include:

- RBT_BILLING_ACCOUNT
- RF_INST_PRODUCT
- RB_CUSTOMER
- VALIDATORSERVICE

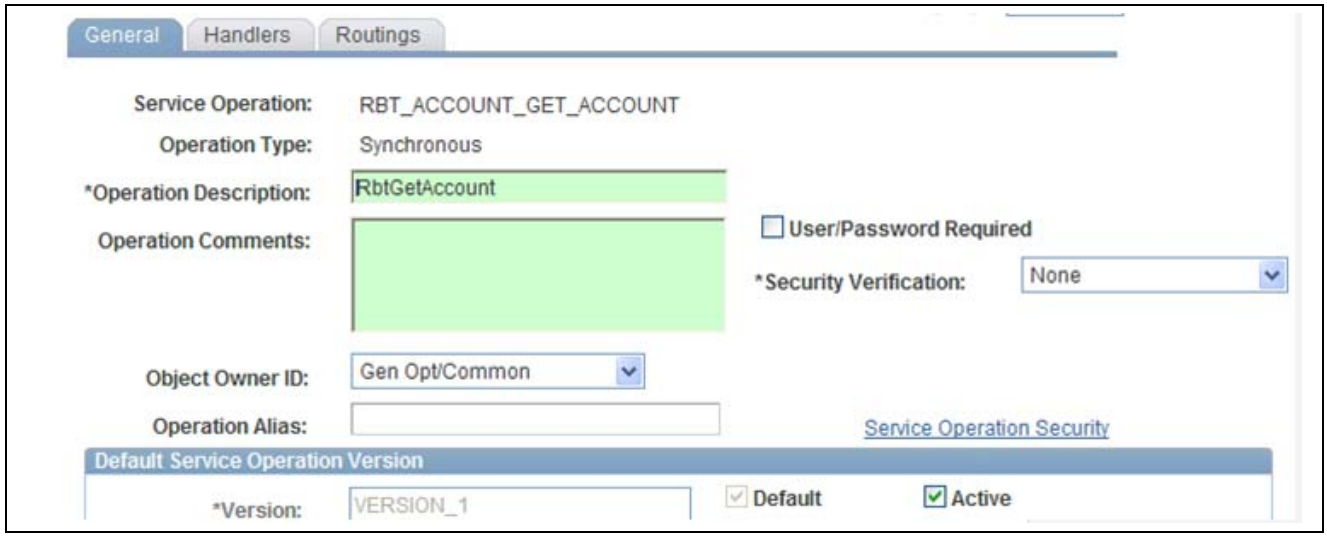
To activate these services, their handlers, and their routings:

1. Select PeopleTools, Integration Broker , Integration Setup, Services.
2. Search for and open *RBT_BILLING_ACCOUNT*.
3. Scroll down to the Existing Operations grid at the bottom of the page, as shown in the following example:



Existing Operations - Operation tab

4. Click the first Operation to open the Service Operation definition.
5. Select the Active check box, as shown in the following example:



Service Operations - General page

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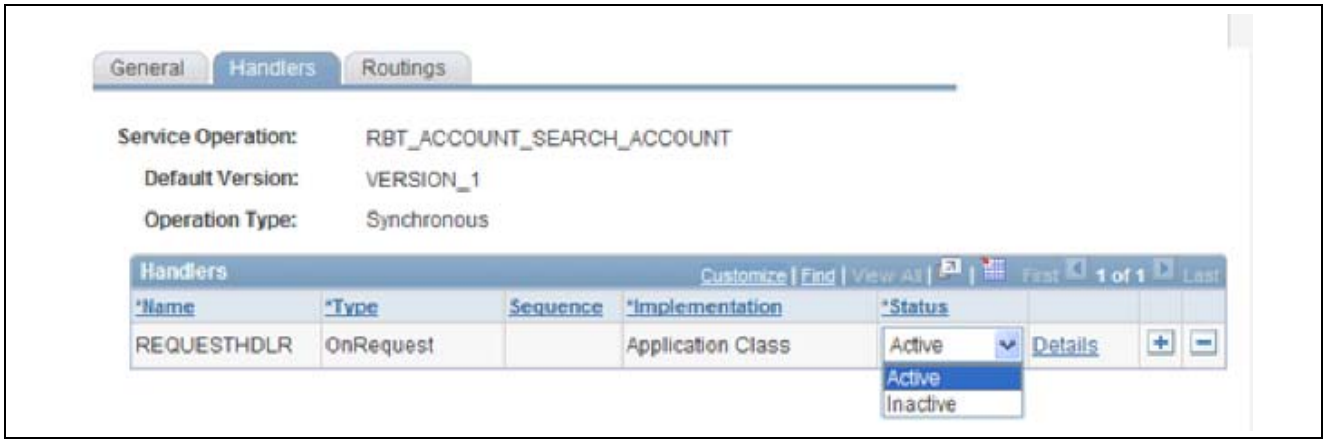
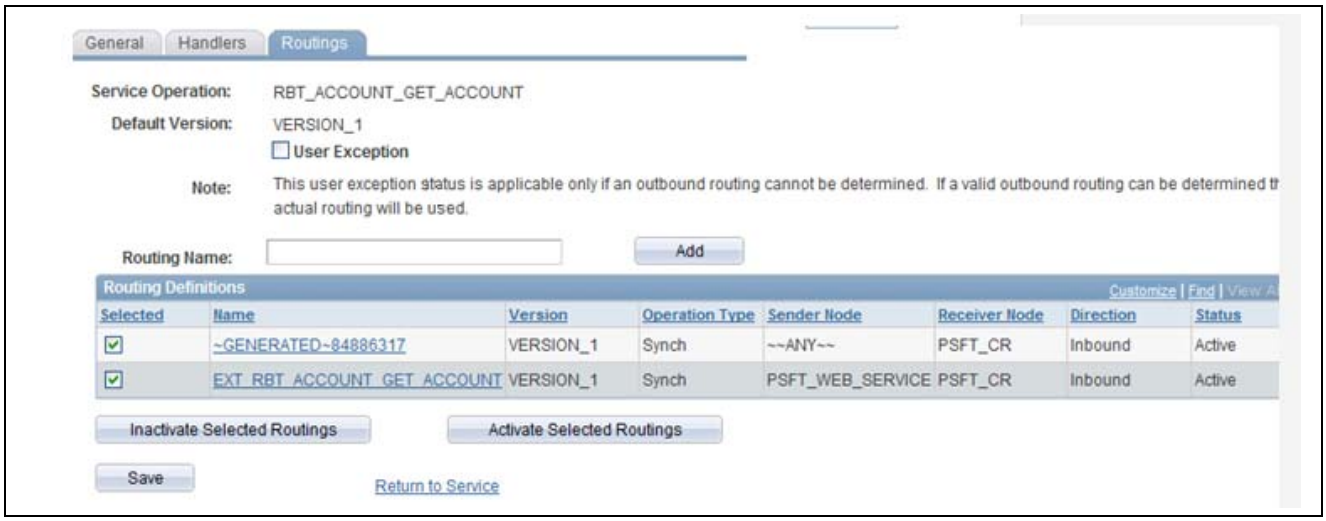
6. Select the Handlers tab.
7. Update the Handler status to *Active*, as shown in the following example:



Service Operations - Handlers page

8. Click Save.
9. Select the Routings tab.
10. Select the check box beside each Routing name, as shown in the following example:



Service Operations - Routings page

11. Click the Activate Selected Routings button.
12. Click Save, and then click OK. Then click the Return to Service link.

    You will be returned to the Service page.
13. Repeat steps 4 through 8 for the remaining Operations until each one and their Handlers and Routings are Active.
14. Repeat steps 1 through 9 for the remaining Web Services, RF_INST_PRODUCT, RB_CUSTOMER, and VALIDATORSERVICE.

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Task 13-3-3: Verifying the Configurator Connection on PeopleSoft Pure Internet Architecture

To verify the Oracle WebLogic Controller on PeopleSoft Pure Internet Architecture:

1. Login as *CSPADMIN/CSPADMIN*.
2. Select Order and Quotes, Add Order (click the first option).
3. Enter *Softgear Inc* in the Customer field.
4. Enter First Name *Ted* and Last Name *Pepper*
5. Click the Search button. From the search results, click the Softgear link.
6. Enter *My Home* in the Add Product(s) field and click the Add button.
7. Click the Configure Product button.
8. The PeopleSoft system should launch an Oracle WebLogic Controller page for My Home.

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CHAPTER 14

Integrating PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9.0

This chapter discusses:

- Understanding PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9.0
- Prerequisites
- Setting Up PeopleSoft SA Database for PeopleSoft OLM Integration
- Setting Up PeopleSoft OLM for PeopleSoft SA Integration

Understanding PeopleSoft Online Marketing 9.1 and PeopleSoft Student Administration 8.9 and 9.0

This chapter provides instructions for integrating Oracle's PeopleSoft Online Marketing (OLM) 9.1 and PeopleSoft Student Administration 8.9 and 9.0 (SA 8.9/9.0).

Important! CRM 9.1 Integrated to Campus Solutions 9.0 Feature Pack 2 provides additional features over CRM 9.1 integrated to earlier versions of Campus Solutions. For more information about this intregration, refer to "Appendix B: Getting Started with CRM for Higher Education", in this documentation.

Note. Before proceeding with your installation, consult My Oracle Support to ensure that you have the latest version of the following documents: "PeopleSoft PeopleTools Installation" guide for your database platform, release 8.52 or higher, and *PeopleSoft PeopleTools PeopleBooks* for your current release.

Note. Consult Oracle's PeopleSoft CRM 9.1 Product-to-PeopleBook Index that can be found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

Prerequisites

Before you begin PeopleSoft OLM and PeopleSoft SA installation and integration, ensure that these requirements are met:

- Install and configure a PeopleSoft CRM 9.1 database.
- Install and configure a PeopleSoft SA database (PeopleSoft SA 8.9 and 9.0 are now part of Human Capital Management 8.9/9.0).

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- Ensure that the following items are verified in the PeopleSoft CRM and the PeopleSoft SA databases:
  a. The service operation for a particular message must be set to *Active*.
  b. The handler and routing that correspond to the service operation must be set to *Active*.
  c. Queue corresponding to service operation must be in *Run* status.

Note. Configuring the PeopleSoft SA database for integration to a PeopleSoft CRM database requires that you carry out tasks on *both* the PeopleSoft CRM database and the PeopleSoft SA database. The task *Setting Up the Student Administration Database for OLM Integration*, describes the steps that you must perform on the PeopleSoft SA database. The task *Setting Up Online Marketing for PeopleSoft Student Administration Integration*, describes the steps that you must perform on the PeopleSoft CRM database.

Complete this task for both the PeopleSoft CRM database and the PeopleSoft SA database:

Setting Up the FTP Server for the PeopleSoft Student Administration Database.

Task 14-1: Setting Up PeopleSoft SA Database for PeopleSoft OLM Integration

This section discusses:

- Setting Up and Testing the EIP Configuration
- Defining Full Data Publish Rules
- Setting Service Operations Security
- Granting Security for Application Engine Processes and New Pages
- Using the ADCRMPST Job Definition
- Using the SAD_CRM_SYN2 Process Definition

Note. Complete the steps in this section on the PeopleSoft SA database.

Task 14-1-1: Setting Up and Testing the EIP Configuration

This section discusses:

- Verifying the Local Gateway Properties
- Setting Up PeopleSoft CRM External Node Connector
- Testing the PeopleSoft CRM Node
- Activating the Domain

Verifying the Local Gateway Properties

To verify the local Gateway properties:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for the Integration Gateway ID.

   URL format: http://<*SA machine_name*>:<*port*>/PSIGW/PeopleSoftListeningConnector

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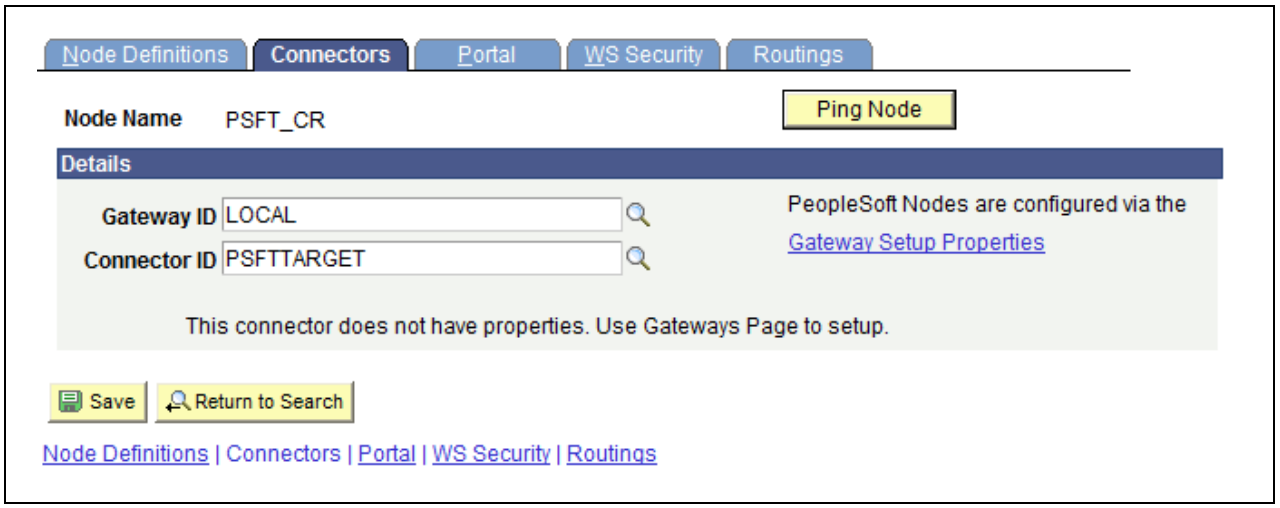
Note. Local Gateway properties are set up during the PeopleSoft SA 9 installation.

Setting Up PeopleSoft CRM External Node Connector

To set up the PeopleSoft CRM external node connector:

1. Select People Tools, Integration Broker, Integration Setup, Nodes.
2. Search for the node PSFT_CR.
3. Ensure that the Active Node check box is selected.
4. Configure the node connection as follows:
   a. Select the Connectors tab, and ensure that the Connection ID is set to *PSFTTARGET.*

      The following is an example of the Connectors tab:



PSFT_CR_Node_Connectors page

   b. Click the Gateway Setup Properties link, enter the user ID and password, and click OK.
   c. Set the URL value to that of the PeopleSoft CRM local gateway for the PSFT_CR node.
   d. The URL format is http:// *<CRM_machinename>:<port>*/servlets/gateway.
5. Click OK.
6. Click Save.
7. Click the Routings tab to ensure that all of the following routings are defined, and set to the *Active* status, for this PeopleSoft CRM node:
   - CS_ADM_APPL_DATA_FULLSYNC
   - CS_ADM_PRSPCT_DATA_FULLSYNC
   - CS_EMAIL_NOTICE
   - CS_PERS_DATA_EXTEND_FULLSYNC
   - CS_PRFL_ATTR_CHOICES_FULLSYNC
   - CS_SCRTY_APPL_CTR_FULLSYNC
   - CS_SCRTY_RECR_CTR_FULLSYNC
   - CS_STUDENT_BOID_SYNC

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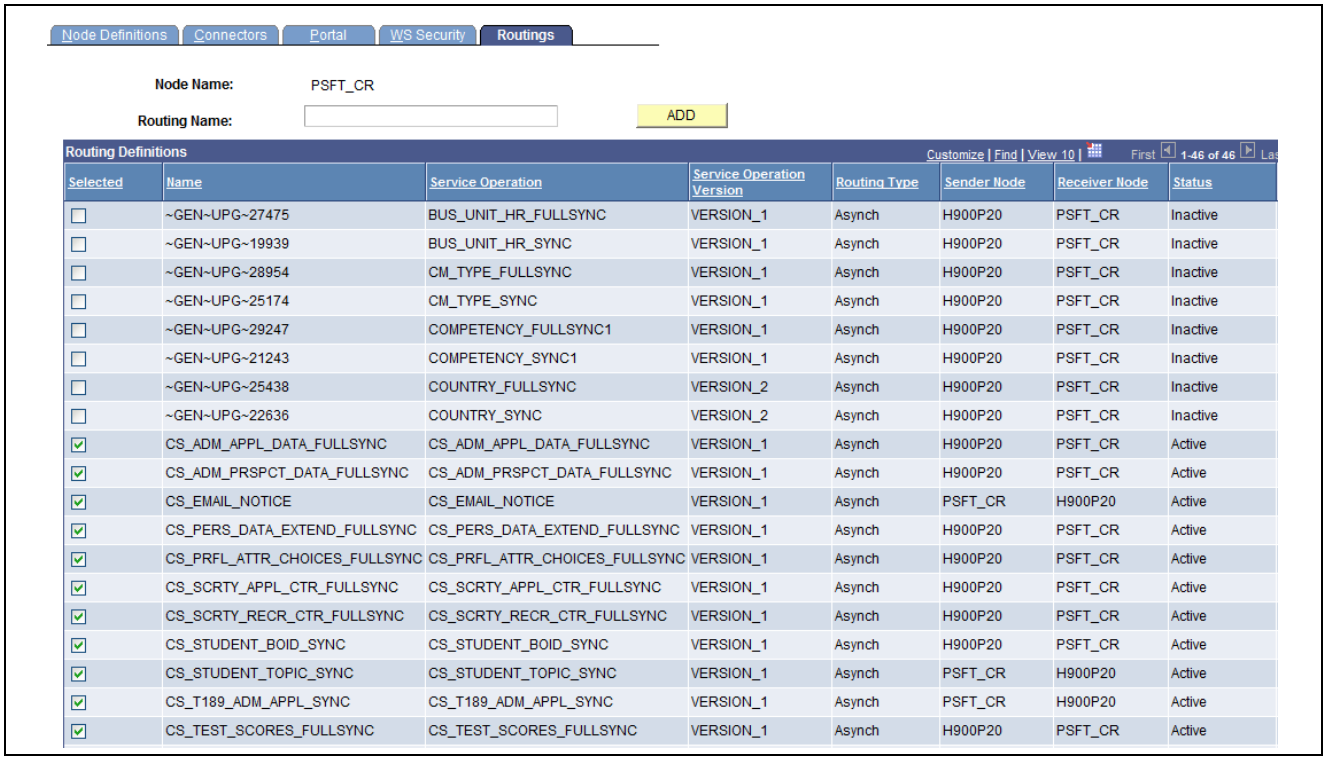
- CS_STUDENT_TOPIC_SYNC
- CS_T189_ADM_APPL_SYNC
- CS_TEST_SCORES_FULLSYNC

The following is an example of the Routings page for this PSFT_CRM node, showing an *Active* status:



Selected	Name	Service Operation	Service Operation Version	Routing Type	Sender Node	Receiver Node	Status
☐	~GEN~UPG~27475	BUS_UNIT_HR_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~19939	BUS_UNIT_HR_SYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~28954	CM_TYPE_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~25174	CM_TYPE_SYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~29247	COMPETENCY_FULLSYNC1	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~21243	COMPETENCY_SYNC1	VERSION_1	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~25438	COUNTRY_FULLSYNC	VERSION_2	Asynch	H900P20	PSFT_CR	Inactive
☐	~GEN~UPG~22636	COUNTRY_SYNC	VERSION_2	Asynch	H900P20	PSFT_CR	Inactive
☑	CS_ADM_APPL_DATA_FULLSYNC	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_ADM_PRSPCT_DATA_FULLSYNC	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_EMAIL_NOTICE	CS_EMAIL_NOTICE	VERSION_1	Asynch	PSFT_CR	H900P20	Active
☑	CS_PERS_DATA_EXTEND_FULLSYNC	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_PRFL_ATTR_CHOICES_FULLSYNC	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_SCRTY_APPL_CTR_FULLSYNC	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_SCRTY_RECR_CTR_FULLSYNC	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_STUDENT_BOID_SYNC	CS_STUDENT_BOID_SYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active
☑	CS_STUDENT_TOPIC_SYNC	CS_STUDENT_TOPIC_SYNC	VERSION_1	Asynch	PSFT_CR	H900P20	Active
☑	CS_T189_ADM_APPL_SYNC	CS_T189_ADM_APPL_SYNC	VERSION_1	Asynch	PSFT_CR	H900P20	Active
☑	CS_TEST_SCORES_FULLSYNC	CS_TEST_SCORES_FULLSYNC	VERSION_1	Asynch	H900P20	PSFT_CR	Active

Routings page

Testing the PeopleSoft CRM Node

To test (ping) the PeopleSoft CRM node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft CRM default local node (for example, *PSFT_CR*).
3. Click the Ping Node button and verify that *Success* appears in the Message Text column.

Activating the Domain

To activate the domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
2. In the Domains grid, ensure that the Domain Status of the machine of gateway is set to *Active.*

   If it is not, select *Active,* click the Update button, and then click Refresh.

Task 14-1-2: Defining Full Data Publish Rules

You must define a rule for each full sync message that is defined in your system.

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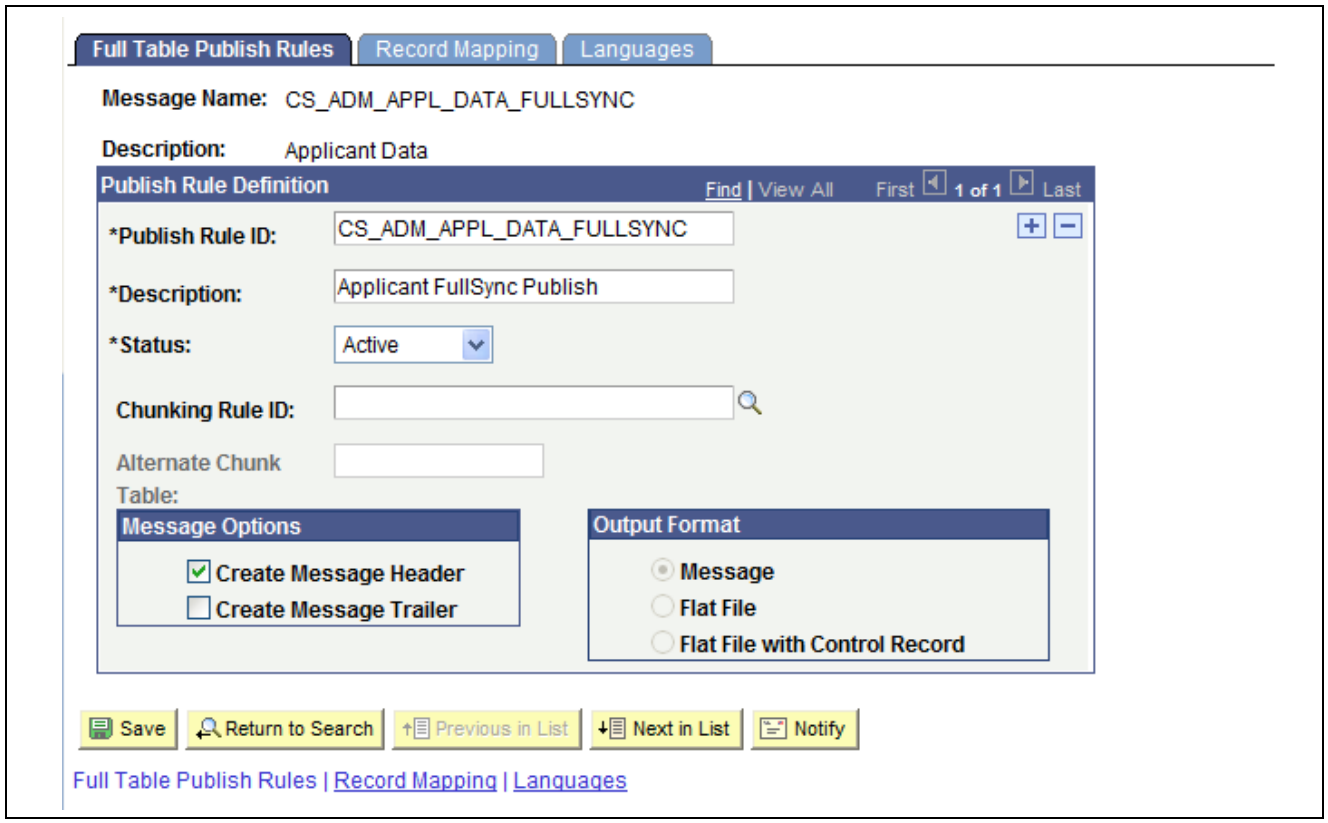
Note. In this task you configure full table publish rules for PERSON_BASIC_FULLSYNC. The first full publish sync that you perform using PERSON_BASIC_FULLSYNC will publish all EMPLIDs in your PeopleSoft HCM database to PeopleSoft CRM. This is necessary to populate the appropriate PeopleSoft CRM tables that may later be updated by subsequent incremental personal data updates using PERSON_BASIC_SYNC.

To define full data publish rules:

1. Select Enterprise Components, Integration Definitions, Full Data Publish Rules.
2. Create full data publish rules for the message CS_ADM_APPL_DATA_FULLSYNC as shown in the following example:



Example of Full Table Publish Rules page

   a. Select the Full Table Publish Rules tab and enter a Publish Rule ID and a Description.
   b. Select *Active* from the Status drop-down list.
   c. In the Message Options section, select the Create Message Header check box.
   d. Select the Record Mapping tab and enter the information, as shown in the following example:

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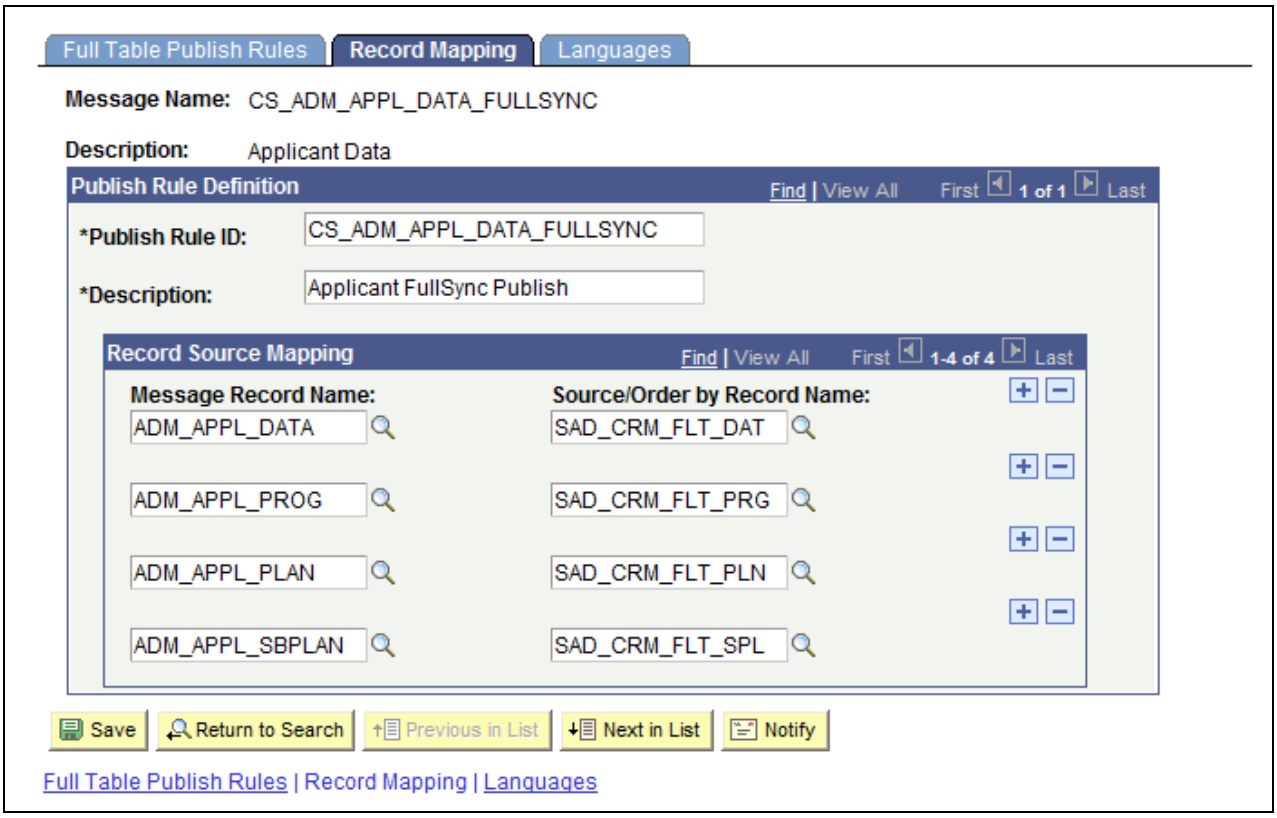

Example of Record Mapping page

This table lists the Message Record Name and corresponding Source/Order by Record Name:

Message Record Name	Source/Order by Record Name
ADM_APPL_DATA	*SAD_CRM_FLT_DAT*
ADM_APPL_PROG	*SAD_CRM_FLT_PRG*
ADM_APPL_PLAN	*SAD_CRM_FLT_PLN*
ADM_APPL_SBPLAN	*SAD_CRM_FLT_SPL*

3. Create a rule for each of the messages listed in the following table:

Message Name	Message Record Name	Source/Order by Record Name
CS_ADM_PRSPCT_DATA_ FULLSYNC	ADM_PRSPCT_CAR	SAD_CRM_FLT_PRS
CS_PERS_DATA_EXTEND_ FULLSYNC	ADM_INTERESTS	SAD_CRM_FLT_ADM
	DISABILITY	SAD_CRM_FLT_DIS
	DIVERSITY	SAD_CRM_FLT_DIV
	EXTRACUR_ACTVTY	SAD_CRM_FLT_EXT
	EXT_ACAD_DATA	SAD_CRM_FLT_ACD
	EXT_ACAD_SUM	SAD_CRM_FLT_ACS
	PERSONAL_DATA	SAD_CRM_FLT_PER

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Message Name	Message Record Name	Source/Order by Record Name
	SRVC_IND_DATA	SAD_CRM_FLT_SRV
CS_SCRTY_APPL_CTR_ FULLSYNC	No mapping required	
CS_SCRTY_RECR_CTR_ FULLSYNC	No mapping required	
CS_TEST_SCORES_FULLSYNC	STDNT_TEST	SAD_CRM_FLT_TST

Note. Ensure that you select the Header option for each message.

4. Create publish rules for PERSON_BASIC_FULLSYNC.
   a. Select the Full Table Publish Rules tab and enter a Publish Rule ID and a Description (for example, *Person_Basic_Full*).
   b. Select *Active* from the Status drop-down list.
   c. In the Message Options section, select the Create Message Header check box.
   d. Select the Full Table Publish Rules tab and enter a Publish Rule ID and a Description (for example, *Person_Basic_Inc*).
   e. Select *Inactive* from the Status drop-down list.
   f. In the Message Options section, select the Create Message Header check box.
   g. Select the Record Mapping tab and enter the following:

      In the Message Record Name field, enter *PERSON*.

      In the Source/order by Record name field, enter *SAD_CRM_FLT_BAS.*

Note. You can use this new row to perform incremental full sync publishes that are based on the last run date of the process.

The first row is active for the first full publish sync that you perform and does not use a filtering view. All EMPLIDS in your PeopleSoft HCM database will be published by this full sync.

After the first run, you can switch the first row to inactive and then activate the second row. The second row uses a view based on PS_SAD_CRM_FLT_BAS to filter the integration, based on EMPLIDs that exist in the PS_SAD_CRM_ EMPLIDS table, and has a PERS_DATA_EFFDT that is greater than or equal to the last run date of the process.

5. Load profile choices for the message CS_PRFL_ATTR_CHOICES_FULLSYNC:
   a. Select the Full Table Publish Rules tab to create a new row for each of the choice types that are listed in Step 5e.
   b. Create a unique Publish Rule ID and Description for each.
   c. Set the status to *Active.*
   d. Clear the Create Message Header and Create Message Trailer options.
   e. Select the Record Mapping tab. For the Message Record Name of SAD_CRM_ACH_WRK, configure using the values listed in the following table:

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Publish Rule ID	Description	Source/Order by Record Name
ACTIONS	Program Actions	SAD_CRM_ACTN_VW
APP_CENTERS	Application Centers	SAD_CRM_ACTR_VW
ACTIVITIES	Extracurricular Activities	SAD_CRM_ACTV_VW
ADMIT_TERMS	Admit Terms	SAD_CRM_ATRM_VW
ADMIT_TYPES	Admit Types	SAD_CRM_ATYP_VW
CAMPUS	Campus	SAD_CRM_CAMP_VW
EXT_SUBJECTS	External Subjects	SAD_CRM_ESUB_VW
EXT_TERMS	External Terms	SAD_CRM_ETRM_VW
EXP_GRAD_TERMS	Expected Graduation Terms	SAD_CRM_GTRM_VW
GPA_TYPES	GPA Types	SAD_CRM_GTYP_VW
INSTITUTIONS	Institutions	SAD_CRM_INST_VW
PLANS	Academic Plans	SAD_CRM_PLAN_VW
PROGRAMS	Academic Programs	SAD_CRM_PROG_VW
RECRUIT_CAT	Recruiting Categories	SAD_CRM_RCAT_VW
REC_CENTERS	Recruiting Centers	SAD_CRM_RCTR_VW
ACTN_REASONS	Academic Program Action Reasons	SAD_CRM_RSN_VW
REFERRAL_SOURCE	Referral Source	SAD_CRM_RSRC_VW
REQ_TERMS	Requirement Terms	SAD_CRM_RTRM_VW
SUMM_TYPES	Summary Types	SAD_CRM_SMTP_VW
SUB_PLANS	Academic Sub-Plans	SAD_CRM_SPLN_VW
SRVC_IND	Service Indicators	SAD_CRM_SRVC_VW
TERMS	Terms	SAD_CRM_STRM_VW
TEST_COMP	Test Components	SAD_CRM_TCMP_VW
TEST_ID	Test IDs	SAD_CRM_TEST_VW

Task 14-1-3: Setting Service Operations Security

To set Service Operations Security:

1. Select People Tools, Security, Permissions and Roles, Permissions Lists.
2. Select the appropriate permission list (for example, *HCSPSERVICE*).
3. Select the Web Services tab.
4. Verify that FULL access is granted for the following messages:
   - CS_ADM_APPL_DATA_FULLSYNC
   - CS_ADM_PRSPCT_DATA_FULLSYNC
   - CS_EMAIL_NOTICE
   - CS_PERS_DATA_EXTEND_FULLSYNC
   - CS_PRFL_ATTR_CHOICES_FULLSYNC
   - CS_SCRTY_APPL_CTR_FULLSYNC
   - CS_SCRTY_RECR_CTR_FULLSYNC

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- CS_STUDENT_BOID_SYNC
- CS_STUDENT_TOPIC_SYNC
- CS_T189_ADM_APPL_SYNC
- CS_TEST_SCORES_FULLSYNC
- PERSON_BASIC_FULLSYNC
- PERSON_BASIC_SYNC

Task 14-1-4: Granting Security for Application Engine Processes and New Pages

To grant security for Application Engine (AE) processes and new pages:

1. Select People Tools, Security, Permissions and Roles, Permissions Lists.
2. Select the appropriate Permission List.
3. Select the Pages tab.
4. Add the menus SAD_CRM_INTEGRATION, EVALUATE_APPLICANTS, and LOAD_EXTERNAL_DATA.
5. Click the Edit Pages link for the SAD_CRM_INTEGRATION, EVALUATE_APPLICANTS, and LOAD_EXTERNAL_DATA menus that you just added.
6. Click the Select All button for each menu.
7. Click OK.
8. Click OK again.
9. Click Save.

Note. You may need to sign out and sign back in to access the menu items.

The system delivers two methods for running the Application Engine process that posts the File Attachment Locator and Long Text Responses to the PeopleSoft SA Recruiting and Admissions transaction tables:

- You can use a *Job* that automatically runs the existing TS189 People Search/Match/Post SQR first, followed by the new PeopleSoft CRM Post File Attachments/Long Text application engine process.
- Alternatively, you can use the delivered Process Definition that runs only the PeopleSoft CRM Post File Attachments/Long Text application engine process.

This Application Engine process also publishes the CS_STUDENT_BOID_SYNC message to provide EMPLID to BO_ID mapping to PeopleSoft CRM 9.1.

Task 14-1-5: Using the ADCRMPST Job Definition

To use the job definition:

1. Select Home, PeopleTools, Process Scheduler, Jobs.
2. In the Process Job field, enter *ADCRMPST.*
3. Select the Job Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

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Note. If the user decides to use the Job Definition, you should delete the Process Groups for the previous EDI TS189 People Search/Match/Post (ADAPPPST).

Task 14-1-6: Using the SAD_CRM_SYN2 Process Definition

To access the process definition:

1. Select Home, PeopleTools, Process Scheduler, Processes.
2. Enter the Process Name = *SAD_CRM_SYN2*.
3. Select the Process Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

The setup tasks for the installation on the PeopleSoft SA side are now complete.

Task 14-2: Setting Up PeopleSoft OLM for PeopleSoft SA Integration

This section discusses:

- Prerequisites
- Setting Up and Testing the EIP Configuration
- Setting Up the Web Template URL in the PeopleSoft CRM Database
- Assigning Valid Mailbox Email Addresses
- Defining SETID for Inbound EIP Data
- Setting Up the FTP Server for the PeopleSoft SA Database
- Populating Profile Attribute Choices from PeopleSoft SA to PeopleSoft CRM
- Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database
- Populating Student Data from PeopleSoft SA to PeopleSoft CRM
- Deploy CS_ Dialogs to Start Dialog Execution
- Running the TS189 Processes to Post Data (Optional)
- Posting Dialog Questions from PeopleSoft CRM to PeopleSoft SA in the PeopleSoft CRM Database (Optional)

Prerequisites

Ensure that the following requirements are met before you begin setting up PeopleSoft SA integration:

- A fully functional PeopleSoft CRM Online Marketing (OLM) environment is installed.

  See "Installing PeopleSoft Online Marketing 9.1."
- Security Enterprise Integration Point (EIP) settings for the Person Basic Fullsync are set.

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See "Installing PeopleSoft Online Marketing 9.1, " Improving Online Marketing Transaction Performance.

Task 14-2-1: Setting Up and Testing the EIP Configuration

This section discusses:

- Setting Up the JOLT Connect String for Application Servers
- Verifying the Local Gateway Properties
- Verifying the Required Routings if Defined in Local Node
- Setting Up the Student Administration External Node and Connector
- Testing the PeopleSoft CRM Default Local Node
- Testing the PeopleSoft SA Node
- Activating the Domain

Setting Up the JOLT Connect String for Application Servers

Add the following properties in <*PS_CFG_HOME*>\webserv\peoplesoft\applications\peoplesoft\PSIGW \WEB-INF\integrationGateway.properties:

```
ig.isc.CRMNODENAME.serverURL=//CRMAppServerMachine:9000
ig.isc.CRMNODENAME.userid= opuserId
ig.isc.CRMNODENAME.password= opuserIPwd (encrypted password)
ig.isc.CRMNODENAME.toolsRel=CRM Tools version (8.48 for CRM 9)
```

CRMNODENAME is the PeopleSoft CRM default local node name (for example, *PSFT_CR*).

Verifying the Local Gateway Properties

To verify the local Gateway properties:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for the Integration Gateway ID.

   URL format: `http://`<*CRM machine_name*>`:`<*port*>/PSIGW/PeopleSoftListeningConnector

---

Note. Local Gateway properties are set up during the PeopleSoft CRM 9.1 installation.

Verifying the Required Routings if Defined in Local Node

To verify the required routings:

1. Select PeopleTools, Integration Broker, Integration Set up, Nodes.
2. Search for the default local node (for example, *PSFT_CR*).
3. Select the Routings tab and ensure that the routings shown in the Default Local Node page are defined and active, as shown in the following example:

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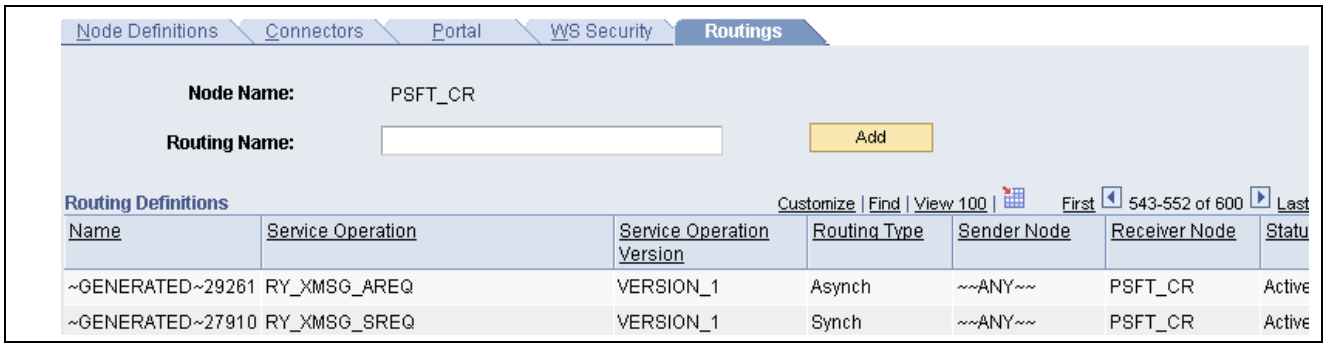


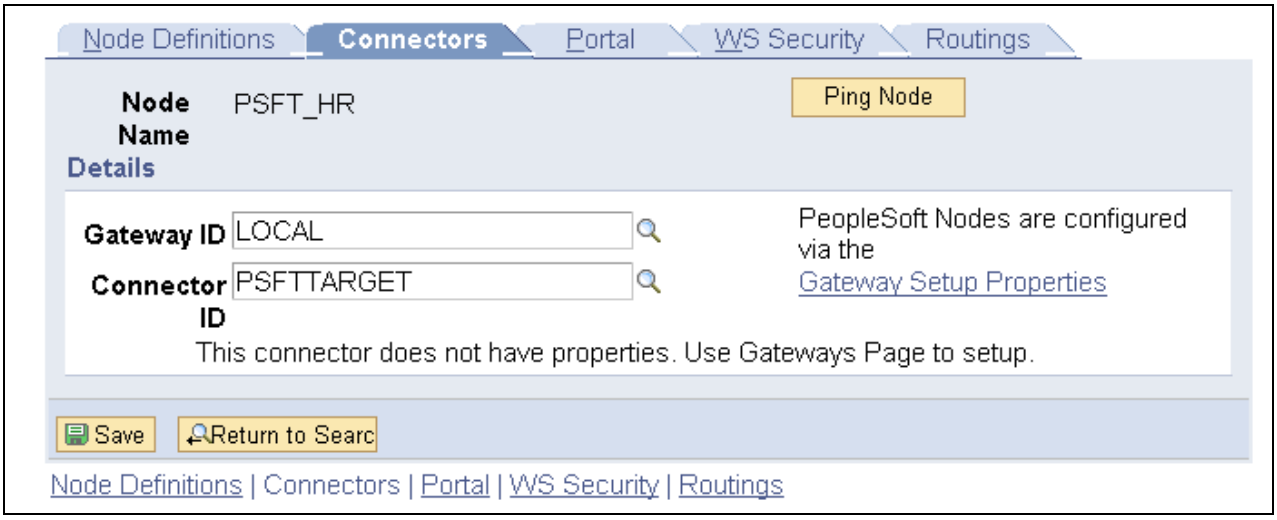
Default Local Node page

Setting Up the Student Administration External Node and Connector

To set up the PeopleSoft SA external node and connector:

1. Select PeopleTools, Integration Broker, Integration Set up, Nodes.
2. Search for the node PSFT_HR.
3. Ensure that the Active Node check box is selected.
4. Configure the node connection as follows:
   a. Select the Connectors tab, and ensure that the Connection ID is set to *PSFTTARGET* for PeopleSoft SA 8.9/9.0.

      Example of the Connectors tab:



Connectors page

   b. Click the Gateway Setup Properties link to access the PeopleSoft Node Configuration page, as shown in the following example:

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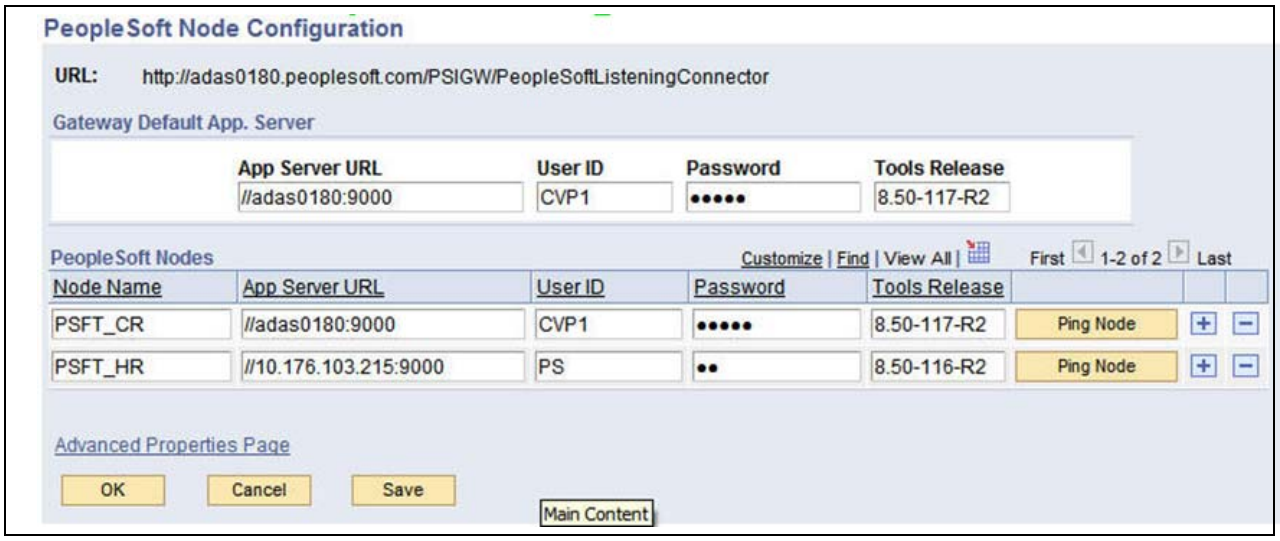
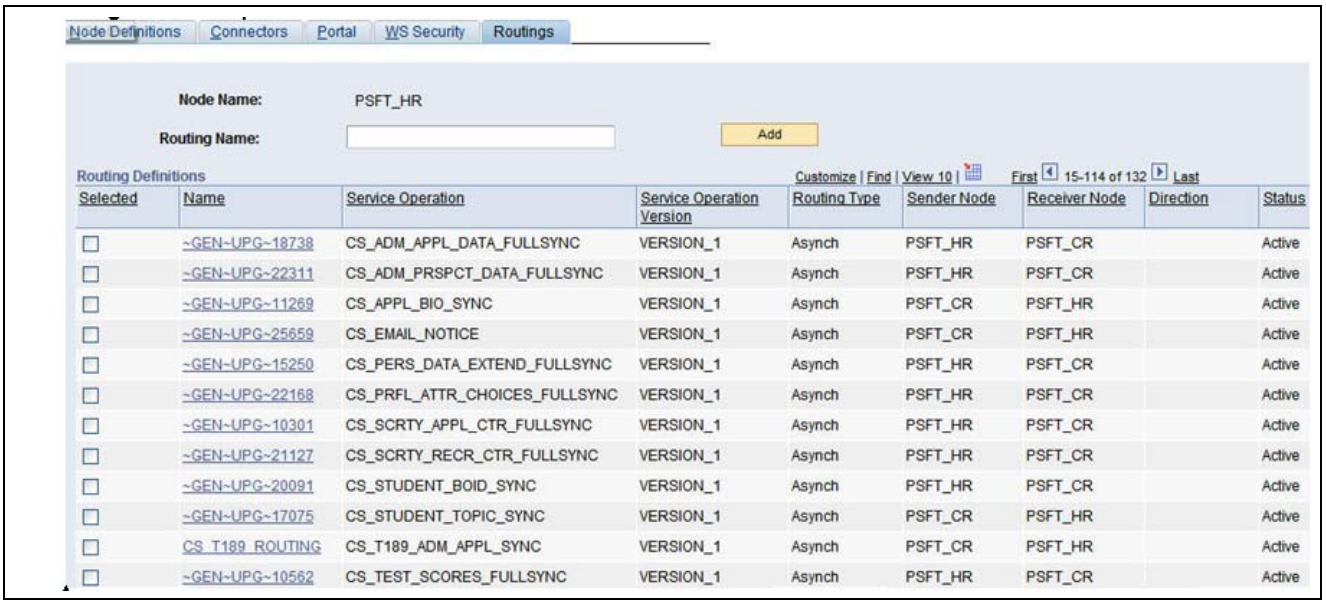


PeopleSoft Node Configuration page

c. Enter the user ID and password, and click OK.

d. Set the SA server and port for node PSFT_HR.

5. Click OK.
6. Click Save.
7. Click the Routings tab to ensure that all of the routings are active and verify that the required routings are defined for this PeopleSoft SA node, as shown in the following example:



PeopleSoft Routings page

Testing the PeopleSoft CRM Default Local Node

To test (ping) the PeopleSoft CRM default local node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft CRM default local node (for example, *PSFT_CR*).

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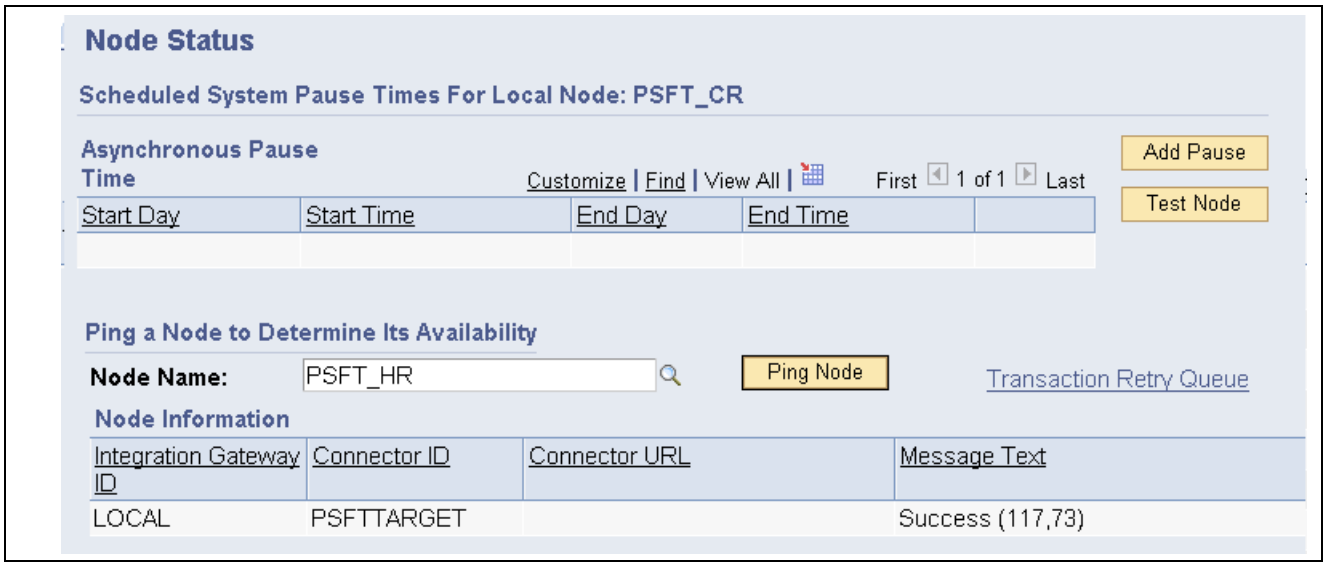
3. Click the Ping Node button and verify that *Success* appears in the Message Text column, as shown in the following example:



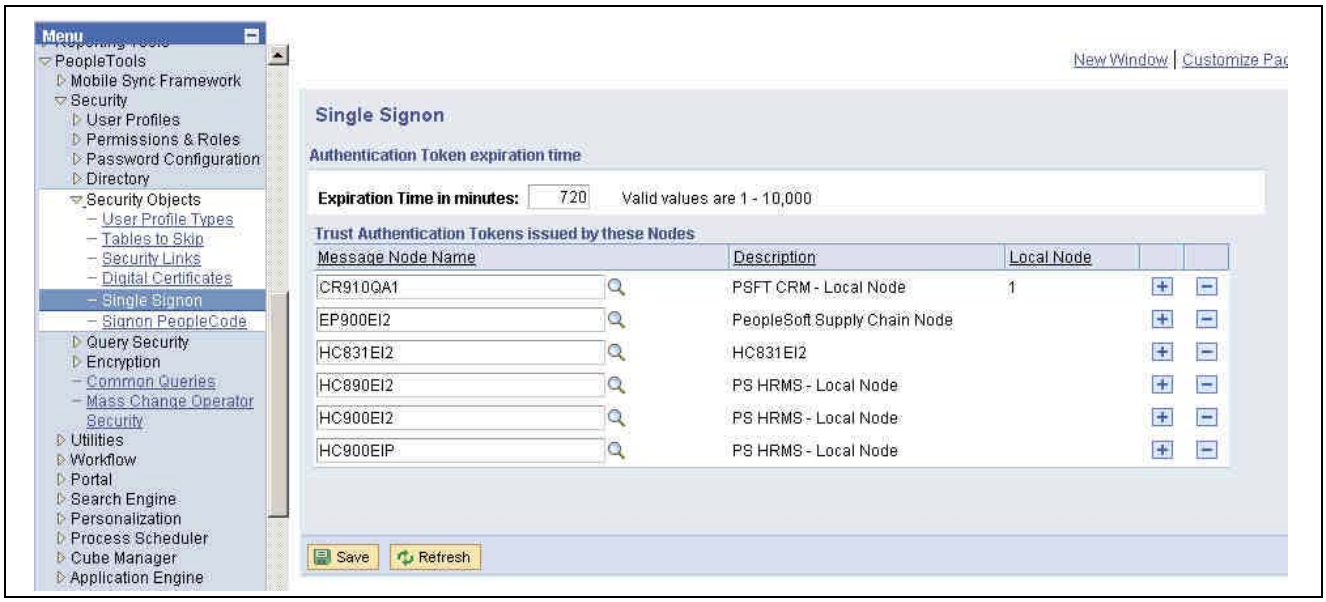
Node Status page - PeopleSoft CRM local node

Important! During the PeopleSoft SA integration set up, on the PeopleSoft CRM side, the instructions prompt you to set up and ping the local nodes. However, if these local nodes are not set up in PeopleSoft Single Signon, the ping will fail with the following error:

"Authentication Failed for Node<Node Name> (158,454)."

To resolve this, use your left pane navigation to select PeopleTools, Security, Security Objects, Single Signon, to access the PeopleSoft Single Signon page. On the PeopleSoft Single Signon page, add the nodes and then click Save. You can now ping the local nodes and receive a successful response.

Refer to the following example of the PeopleSoft Single Signon page showing the PeopleSoft CRM node CR910QA1 listed as the Local Node:



PeopleSoft Single Signon page

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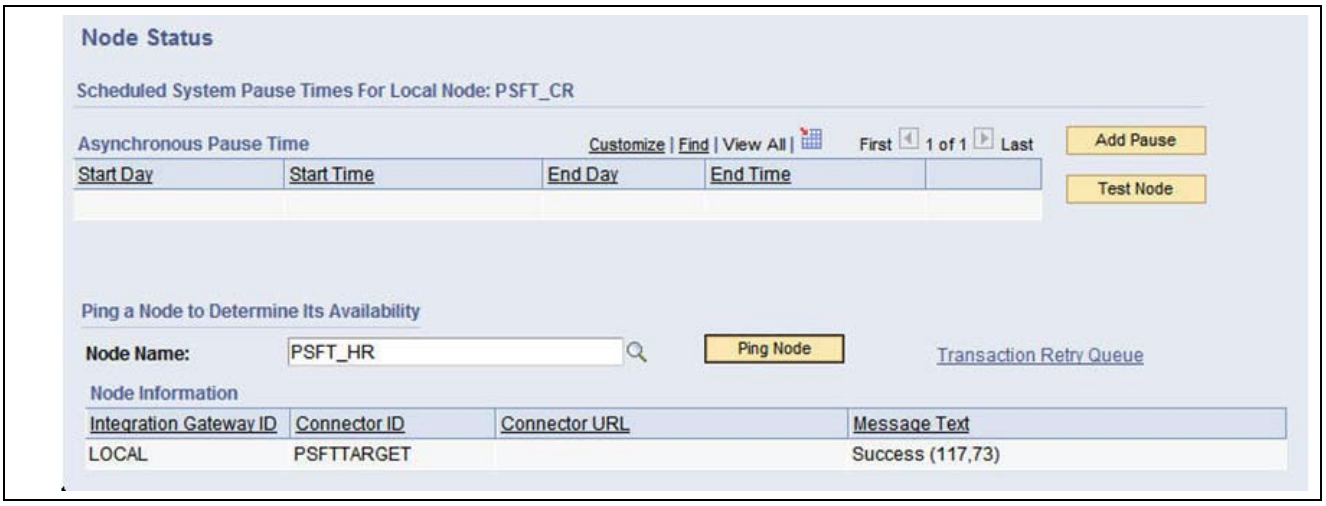
Testing the PeopleSoft SA Node

To test (ping) the PeopleSoft SA node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft SA default local node (for example, *SA890CR2* or *SA801CR2*).
3. Click the Ping Node button and verify that *Success* appears in the Message Text column, as shown in the following example:



Node Status page - PeopleSoft SA local node

Activating the Domain

To activate the domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
2. In the Domains grid, ensure that the Domain Status of the machine of gateway is set to *Active*.

   If it is not, select *Active*, click the Update button, and then click Refresh.

Task 14-2-2: Setting Up the Web Template URL in the PeopleSoft CRM Database

To set up the web template URL to a valid template file location in the PeopleSoft CRM database:

1. Select Set Up CRM, Product Related, Online Marketing, Template Setup.
2. Enter *PSUSI* in the SETID field and click the Search button.
3. For each Template ID with prefix CS in the description field, do the following:
   a. Open the template.
   b. Replace the *<DES Server>:<port>* with the valid DES server in the URL.

      URL format: http://*<DES Server>:<port>*/DCS/Sample/SA/templates/GLAKE_Undergrad.html

Task 14-2-3: Assigning Valid Mailbox Email Addresses

To assign valid mailbox email addresses:

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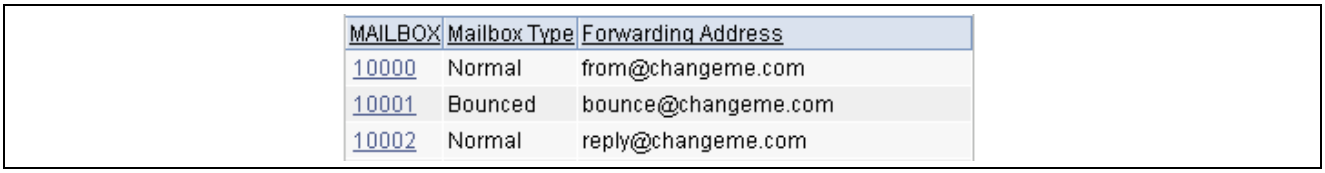
1. Select Set Up CRM, Product Related, Online Marketing, Mailbox Setup.
2. Assign valid email addresses to each of the mailboxes, as shown in the following example:



MAILBOX	Mailbox Type	Forwarding Address
10000	Normal	from@changeme.com
10001	Bounced	bounce@changeme.com
10002	Normal	reply@changeme.com

Mailbox Setup Search page

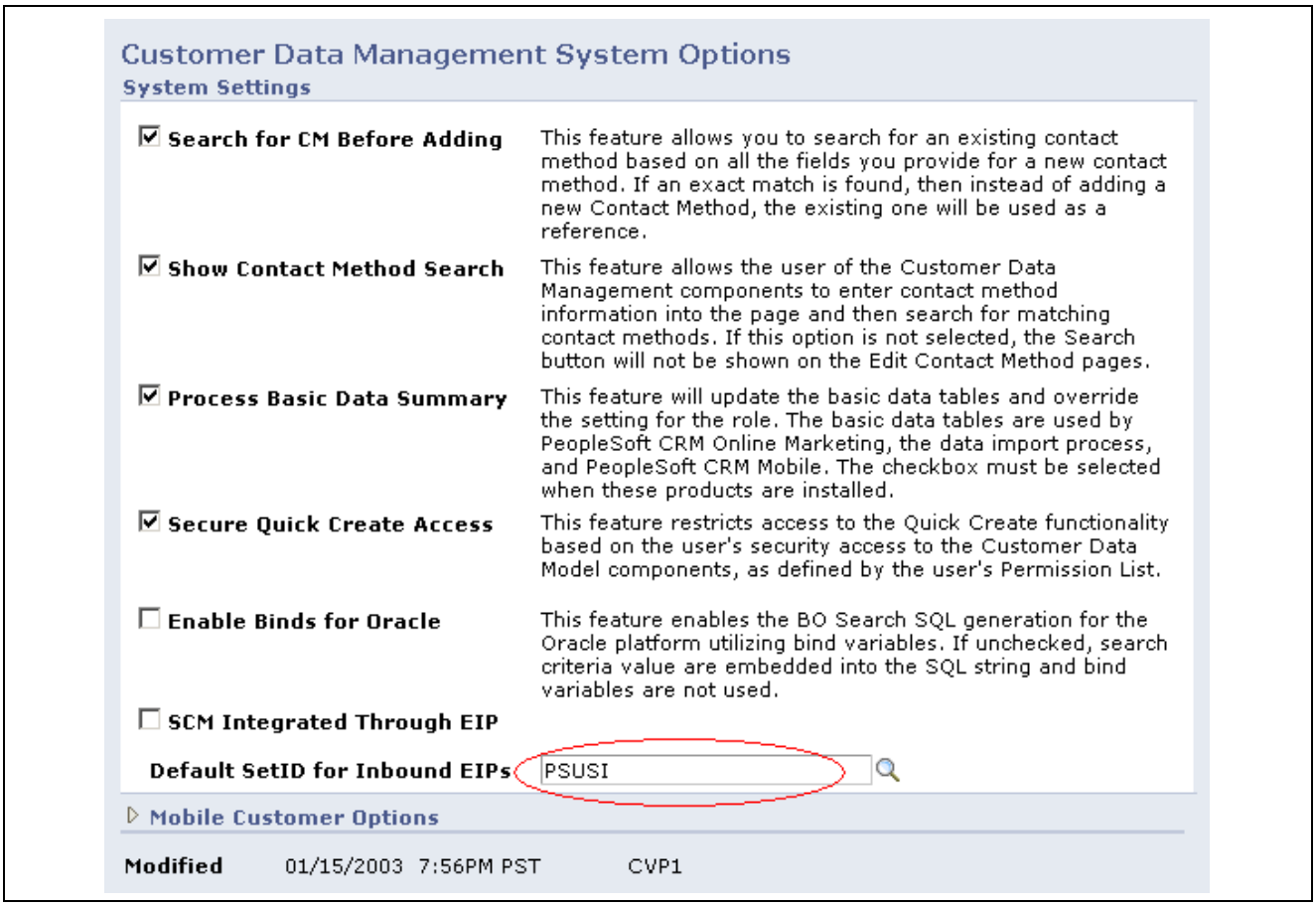
Mailbox	Mailbox Type	Forwarding Address
10000	Normal	from@changeme.com
10001	Bounced	bounce@changeme.com
10002	Normal	reply@changeme.com

Task 14-2-4: Defining SETID for Inbound EIP Data

To define inbound data SETID:

1. Select Main Menu, Set Up CRM, Common Definitions, Customer, Customer Installation Options.

   The Customer Data Management System Options page appears, as shown in the following example:



Customer Data Management System Options page

2. Enter *PSUSI* in the Default SetID for Inbound EIPs field, and then click Save.

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Task 14-2-5: Setting Up the FTP Server for the PeopleSoft SA Database

Understanding the FTP Server Setup

When the applicant uploads a file attachment to the PeopleSoft CRM system, it is stored on an FTP server that is defined in the PeopleSoft CRM system. The (student-side) PeopleSoft CRM Post File Attachment/Long Text Application Engine process gets the address of the PeopleSoft CRM system FTP server from the URL table and copy that file to a PeopleSoft SA system FTP server, that also must be defined in the URL table.

Important! Complete all of the steps in this section on the PeopleSoft SA database.

Defining the PeopleSoft CRM FTP Server

To define the PeopleSoft CRM FTP Server:

1. Select Home, PeopleTools, Utilities, Administration, URLs.
2. Click Add a New Value.
3. Specify the URL Identifier, for example, *CRM_SERVER* (this identifier can be any value).
4. Click Add.
5. Enter *CRM FTP Server* in the Description field.
6. Enter the URL of the FTP server. For example: *ftp://user2:pword2@ftp.crmserver.com/files/*

Defining the PeopleSoft Student Administration FTP Server

To define the PeopleSoft SA FTP server:

1. Select Home, PeopleTools, Utilities, Administration, URLs.
2. Select Add a New Value.
3. Specify the URL identifier.

   For example: *SA_SERVER* (This identifier can be any value.)
4. Click Add.
5. Enter *SA FTP Server* in the Description field.
6. Enter the URL: *ftp://user2:pword2@ftp.saserver.com/files/.*

Note. The previous FTP address is an example of a valid FTP address. The actual value depends on the FTP address and login information for the Student-side FTP server.

Defining New URL IDs on the Application Center Table

Two new fields in the Application Center table identify the PeopleSoft CRM FTP Server URL ID and the PeopleSoft SA FTP Server URL ID. Repeat this procedure for each Application Center that is loaded on the PeopleSoft CRM system side.

To define new URL IDs on the Application Center table:

1. Select Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table.
2. Enter the Application Center, for example, *UGRD.*

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URGD is an example of an Application Center. This value is dependent on the user setup data and the application centers that are being used by the applications that are loaded through the PeopleSoft CRM system.

3. Enter the Student FTP Server ID as *SA_SERVER* (or the URL_ID that was created in the URL table for the student-side server).

   See Defining the PeopleSoft Student Administration FTP Server.

4. Enter the PeopleSoft CRM FTP Server ID as *CRM_SERVER* (or the URL_ID that was created in the URL table for the CRM-side server).

   See Defining the PeopleSoft CRM FTP Server.

Task 14-2-6: Populating Profile Attribute Choices from PeopleSoft SA to PeopleSoft CRM

To run the process in the PeopleSoft SA database:

Note. Complete the procedure in this task on the PeopleSoft SA database.

---

1. Select Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Enter a run control ID.
3. Enter a request ID.
4. Enter a description.
5. Select Process Frequency, *Once.*
6. Select Message Name *CS_PRFL_ATTR_CHOICES_FULLSYNC.*

Task 14-2-7: Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database

After populating the profile attribute choices from PeopleSoft SA to PeopleSoft CRM, you must confirm data integrity. Run the PeopleSoft Data Mover scripts to clean up the attribute choice IDs.

To run the PeopleSoft Data Mover scripts to clean up the attribute choice IDs:

1. Open the PeopleSoft Configuration Manager.
2. Select the Profile tab and click the Edit button for the Default profile.
3. Select the Common tab.
4. Set the Input Directory in PeopleSoft Data Mover Directories to <*PS_APP_HOME*>\data (for example, *c:\Tools\data*, or *\\networkmachine\Tools\data*, or *//unixMountDir/Tools/data*).
5. Click OK.
6. Click OK again.
7. Save the configuration setting.
8. Open the script file `olmsaresetids.dms` from <*PS_APP_HOME*>\scripts in PeopleSoft Data Mover.
9. Select File, Run Script.

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10. Recycle the application server and clear the application server cache.
11. Recycle the Dialog Execution Server (DES).

Task 14-2-8: Populating Student Data from PeopleSoft SA to PeopleSoft CRM

Creating Run Control for Student Data

To create Run Control for student data:

Note. Complete this task on the PeopleSoft SA database.

---

1. For PeopleSoft SA 8.9/9.0, select Main Menu, Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Enter the run control ID. For example: *SAD_CRM_INTEGRATION*
3. For PeopleSoft SA 8 SP1, enter a row (using the Add/+ button) with the values listed in the following table:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	CS_PERSON_BASIC_ FULLSYNC

4. For SA 8.9/9.0, enter a row (using Add/+ button) with the values listed in the following table:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	PERSON_BASIC_ FULLSYNC

5. For both SA 8 SP1 and SA 8.9/9.0, enter rows (using Add/+ button) with the values listed in the following table:

Request ID	Description	Process Frequency	Message Name
002	Extend Pers Data	Once	CS_PERS_DATA_ EXTEND_FULLSYNC
003	Applicant Data	Once	CS_ADM_APPL_DATA_ FULLSYNC
004	Prospect Data	Once	CS_ADM_PRSPCT_ DATA_FULLSYNC
005	Test Score Data	Once	CS_TEST_SCORES_ FULLSYNC
006	Application Center Security	Once	CS_SCRTY_APPL_CTR_ FULLSYNC
007	Recruiting Center Security	Once	CS_SCRTY_RECR_ CTR_FULLSYNC

6. Save the run control.

Running the Integration

To run the PeopleSoft SA to PeopleSoft CRM Full Sync Integration:

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Note. Complete this task on the PeopleSoft SA database.

1. For PeopleSoft SA 8.9/9.0, select Set Up SACR, Product Related, Recruiting and Admissions, Manage CRM Integration, Populate ID Control Table.
2. Enter a run control ID.
3. Enter the lower limit date for applicant data.
4. Enter the lower limit date for prospect data.
5. Enter the lower limit date for test scores.

   The dates that you enter on this page are used to create a control list of EMPL IDs that are integrated with PeopleSoft CRM. Only applicants and prospects that you create on or after the dates specified are considered for integration with PeopleSoft CRM. In addition, only test scores loaded on or after the test score as-of date are loaded into PeopleSoft CRM.

Monitoring Service Operations

After the integration process runs and the control table loads, the FULLSYNC messages publish to the PeopleSoft CRM node. You can monitor these service operation details from the Service Operations Monitor.

To monitor service operations:

1. For PeopleSoft SA 8.9/9.0, select Home, People Tools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services.
2. From the Publication Contracts tab, you can monitor these messages by clicking the Details link next to each message:
   - PERSON_BASIC_FULLSYNC (PeopleSoft SA 8.9/9.0 only)
   - CS_PERS_DATA_EXTEND_FULLSYNC
   - CS_ADM_APPL_DATA_FULLSYNC
   - CS_ADM_PRSPCT_DATA_FULLSYNC
   - CS_TEST_SCORES_FULLSYNC
   - CS_SCRTY_APPL_CTR_FULLSYNC
   - CS_SCRTY_RECR_CTR_FULLSYNC

Task 14-2-9: Deploy CS_ Dialogs to Start Dialog Execution

To execute the dialog, you must first deploy all of the CS_ Dialogs to *live*. After the dialogs are live, the invitation emails are sent to prospects and applicants. After prospects and applicants respond and complete the Student/Applicant Application Dialog, the system sends the Student Person Data from PeopleSoft CRM to PeopleSoft SA TS189 Staging tables.

Task 14-2-10: Running the TS189 Processes to Post Data (Optional)

After data loads into the PeopleSoft SA TS189 Staging tables, along with the Application Messages from the PeopleSoft CRM system, the data must be run through the existing TS189 Org Search, TS189 People Search/Match/Post, and PeopleSoft CRM Post File Attachments/Long Text Responses processes.

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Important! This step is *optional*; however, if you run this step, run it on the PeopleSoft SA database.

To run the TS189 processes to post data:

1. For PeopleSoft SA 8.9/9.0, select Main Menu, Student Admissions, Application/Transcript Loads, Organization Search Process.
2. Enter a Run Control ID.
3. Click Run.
4. Verify that the Process Name is *ADAPPORG*.
5. Click OK.
6. For PeopleSoft SA 8.9/9.0, select Main Menu, Student Admissions, Application/Transcript Loads, Search/Match/Post Process.
7. Enter a Run Control ID.
8. Enter appropriate values for the EDI TS189 People Search/Post processes.
9. Click Run.
10. Depending on whether the user has set up security to enable the Job Definition or the Process Definition, select the process or job to be run: ADAPPPST, SAD_CRM_SYN2 (new Application Engine), or ADCRMPST (Job for both processes).

    Note. The SAD_CRM_SYN2 process must be run after the ADAPPPST process, regardless of whether it is run as an individual process or as the Job.

Task 14-2-11: Posting Dialog Questions from PeopleSoft CRM to PeopleSoft SA in the PeopleSoft CRM Database (Optional)

To post a current active dialog topic to PeopleSoft SA:

Note. This process is *optional* and can be run as often as necessary. Perform this step on the PeopleSoft CRM database.

1. Select Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Create a new run control ID.
3. For the Message Name, enter *CS_STUDENT_TOPIC_SYNC.*
4. For the Request ID, enter a value.
5. For Process Request, select *Once,* and click Run.
6. Select the row for Process Name *EOP_PUBLISHT* and click OK.
7. Verify the process from the Process Scheduler Monitor and Message Monitor.

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CHAPTER 15

Installing BPEL and Deploying BPEL Processes

This chapter discusses:

- Understanding PeopleSoft BPEL Integration
- Installing the Oracle BPEL Process Manager
- Configuring the Oracle BPEL Process Manager
- Restarting the Instance
- Recording Access Information
- Creating and Configuring a BPEL Domain
- Configuring PeopleSoft for BPEL Integration
- Deploying PeopleSoft CRM BPEL Processes

Understanding PeopleSoft BPEL Integration

This chapter provides instructions for installing and configuring PeopleSoft Integration Broker and the Oracle Business Process Execution Language (BPEL) Process Manager technologies for PeopleSoft CRM 9.1 applications.

Perform the tasks in this chapter after you successfully install PeopleSoft PeopleTools, as described in the PeopleSoft PeopleTools 8.52 installation guide for your database platform.

Important! You must complete your installation and set up of PeopleSoft Integration Broker before you begin BPEL integration. Refer to the Chapter 1 task titled “Setting Up PeopleSoft Integration Broker” for the steps you must complete.

See *Installing PeopleSoft CRM 9.1 Applications.*

See *PeopleSoft PeopleTools 8.52 Installation guide for your database platform.*

See *PeopleSoft PeopleTools 8.52 PeopleBooks.*

Note. Oracle recommends that you consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

BPEL is widely used by PeopleSoft Order Capture (OC), PeopleSoft Sales, and PeopleSoft Financial Services Industries (FSI). Call Center is BPEL enabled, but none of the Call Center functionality is dependant on BPEL in PeopleSoft CRM 9.1.

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PeopleSoft BPEL integration involves two primary technologies:

- The PeopleSoft Integration Broker.
- The Oracle BPEL Process Manager.

Note. You must configure *both* the PeopleSoft Integration Broker and the Oracle BPEL Process Manager technologies. This chapter covers a simple configuration of PeopleSoft/BPEL integration.

You can obtain the Oracle BPEL Process Manager from two different sources:

- The JDeveloper Install (10.1.3.3.1).

  The JDeveloper BPEL Process Manager is used more for development and unit testing, but you can also use it for a simple environment with minimum workload.

- The Oracle Middle-Tier OAS Install (10.1.3.3.1).

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

Task 15-1: Installing the Oracle BPEL Process Manager

This section discusses:

- Selecting and Installing the Software
- Applying Patches

Task 15-1-1: Selecting and Installing the Software

The Oracle BPEL Process Manager is found as part of two different products:

- The JDeveloper Installation (10.1.3.3.1).
- The Oracle Middle-Tier OAS Installation (10.1.3.3.1).

The JDeveloper installation is for simple testing and BPEL development, while the middle-tier OAS installation should be used for a production environment. You can use the JDeveloper BPEL Process Manager for simple environments with minimal workload. For any other environment, we recommend that you use the Oracle Middle-Tier OAS. The JDeveloper BPEL Process Manager is available with minimal setup requirements, while the Oracle Middle-Tier OAS requires additional planning for installation. The software is available on Oracle's Technology Network (OTN).

See Oracle's Technology Network, http://otn.oracle.com/bpel

Review the installation documentation for your selected software and then perform the installation by following the corresponding installation guide.

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While installing Oracle BPEL Process Manager environment and the PeopleSoft environment, be sure to note the installation directories that you selected for the install. Throughout the remainder of this chapter, the Oracle BPEL Process Manager installation directory is referred to as *<BPEL_PM_HOME>;* the PeopleSoft installation directory is referred to as *<PS_APP_HOME>*.

Note. If you are running the Oracle BPEL Process Manager in an environment that requires proxy servers, ensure that you follow the instructions to configure your Oracle BPEL Process Manager (and supporting command line environments) for a proxy environment.

See Also

PeopleSoft PeopleTools 8.52 Installation for <your database platform>

PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft Integration Broker

Oracle JDeveloper Install Guide

Task 15-1-2: Applying Patches

The Oracle Middle-Tier OAS installation (10.1.3.3.1) and JDeveloper installation (10.1.3.3.1) provide the core functionality necessary to integrate BPEL with the PeopleSoft system, however; you must also install these additional patches:

- Cumulative Patchset OAS 10.1.3.3.0 (6148874)
- Cumulative Patchset OAS 10.1.3.3.1 (7301999)

BPEL integration patches, whether they are specific to the BPEL Process Manager or PeopleSoft BPEL integration, are available on My Oracle Support.

See My Oracle Support

Apply these patches before you activate any BPEL processes using the PeopleSoft BPEL integration. Oracle recommends that you apply *all* available patches before you deploy the PeopleSoft BPEL processes.

Task 15-2: Configuring the Oracle BPEL Process Manager

This section discusses:

- Understanding the Oracle BPEL Configuration
- Adjusting the JTA Transaction Timeout
- Tuning the Sun Java Virtual Machine and Setting Proxy Values
- Timeout Setting Adjustments
- Changing ORABPEL Schema for PeopleSoft Worklist
- Verifying Required Message Container Definitions

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Understanding the Oracle BPEL Configuration

This task primarily involves the Oracle BPEL Process Manager, found as part of the Oracle Middle-Tier OAS installation. The middle-tier requires special configuration. These configurations are extensive and are not covered here.

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

Task 15-2-1: Adjusting the JTA Transaction Timeout

The BPEL engine uses JTA to achieve the atomicity. By default, the transaction timeout value is set to *60000* milliseconds in the server.xml file (*30000* milliseconds in the app server).

See the developer edition, <BPEL_PM_HOME>/system/appserver/oc4j/j2ee/home/config/server.xml.

You may experience a transaction rollback error due to timeouts, especially when the BPEL engine is under stress. The timeout can happen for many reasons. Here are two common reasons:

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

The line in the server.xml file appears as follows:

```
<transaction-config timeout="60000" />
```

A value of *300000* milliseconds is recommended.

Note. The remaining steps of the task *Configuring the Oracle BPEL Process Manager* are primarily for the middle-tier environment. If you are using the JDeveloper BPEL Process Manager, you may skip to the task *Restarting the Instance.*

Task 15-2-2: Tuning the Sun Java Virtual Machine and Setting Proxy Values

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

The garbage collector optimizes collection by classifying objects by how long they live. Most of the BPEL engine objects are short lived, thus they live in the *eden* space. Oracle recommends sizing the eden space to 60-70 percent of the total heap size. Here are the JVM command line options used:

```
-Xms1024m -Xmx1024m -Xmn614m -XX:+AggressiveHeap
```

To change the Java command line options for an OC4J instance:

Go to the OC4J instance homepage and perform the following steps:

1. From Start menu, go to the Oracle Application Server menu and click Oracle Application Server Control. Login to the OC4J Instance homepage and stop the OC4J instance.
2. Drill down to the Server Properties page.
3. In the Command Line Options area of the Server Properties page, under the heading Multiple VM Configuration, set the Java options.

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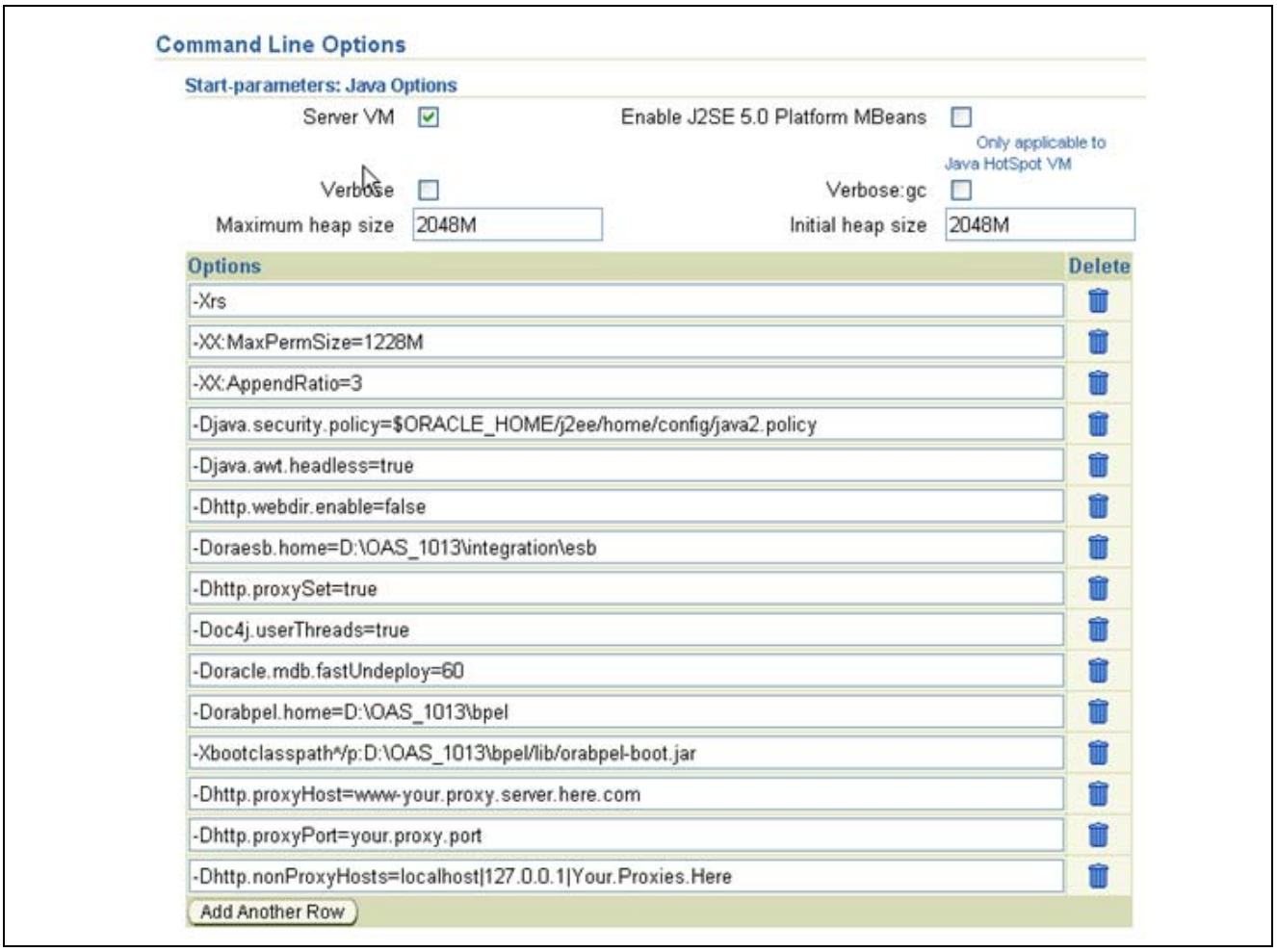
For example, enter the following to set the JVM initial and maximum heap sizes to 2048 megabytes; for garbage collection, set the eden space to 60 percent of heap size:

```
-Xms2048m -Xmx2048m -Xmn1228m
```

4. If you are using two or more CPUs, select the -XX:+AggressiveHeap jvm flag adjacent to the previous command on the Command Line Options page, as shown in the following example:



Command Line Options page

5. PeopleSoft delivered BPEL processes are security-enabled and require access to schemas that are published by www.W3.org. To deploy successfully, the BPEL server must have external web access.

   If your installation resides behind a firewall, you must set proxy values to allow external web access to the BPEL server. Proxy server settings, if any, should be entered on this page as shown.

6. Click the Apply button to apply these changes.
7. Start the OC4J instance.
8. Additional Proxy setting updates should be made to the following file:

   Edit <Oracle_home>\bpel\bin\obsetenv.bat:

```
set PROXY_SET="true"
@REM Where has the JDK (supporting 1.4.1 or higher) been installed on
@REM this machine?
```

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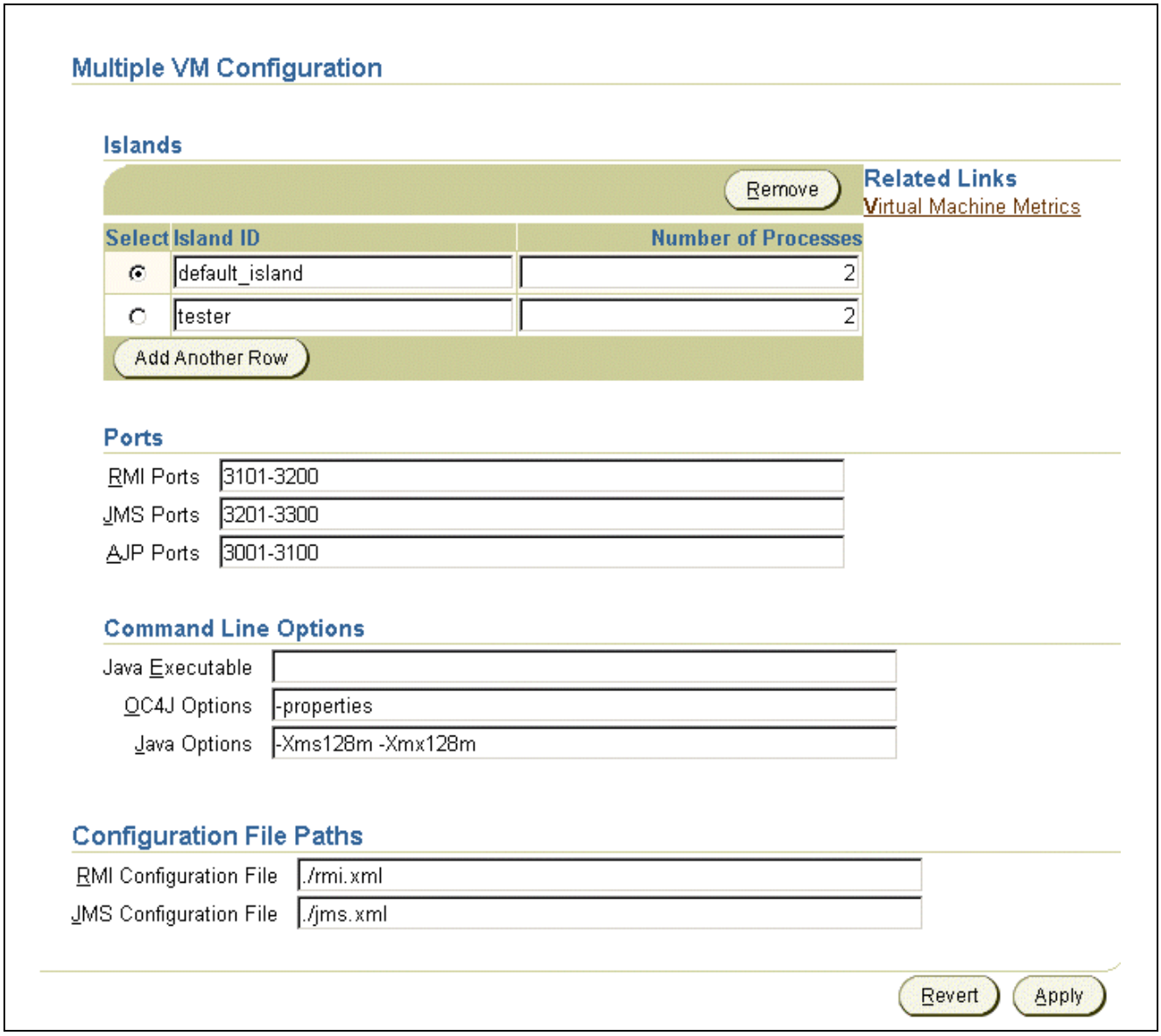
```
set JAVA_HOME=C:\product\10.1.3.1\OracleAS_1\jdk
if %PROXY_SET% == "true" goto set_proxy
set OB_JAVA_PROPERTIES=
set OB_JAVA_PROPERTIES=
goto end_set_proxy
:set_proxy
set OB_JAVA_PROPERTIES="-Dhttp.proxySet=true" "-Dhttp.proxyHost=www-
proxy.us.oracle.com" "-Dhttp.proxyPort=80" "-
Dhttp.nonProxyHosts=localhost|127.0.0.1|rtas145|rtas145.dsi-⇒
inet.peoplesoft.com|*.dsi
inet.peoplesoft.com|*.peoplesoft.com|*.us.oracle.com|*.oracle.com"
:end_set_proxy    enter the proxy values for your server
```

Use the Application Server Control - Multiple VM Configuration page to set Java heap size for an OC4J instance, as shown in the following example:



Application Server Control - Multiple VM Configuration page

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

Note. If your Oracle Application Server (OAS) installation is being performed on a server running Microsoft Windows 2000, you must update the following line in the *obant.bat* file that is found in *[bpel home]/bpel/.bin/obant.ba*

Update line from: `set ANT_ARGS=-Dhome="%OB_HOME%" -Dbpel.home="%OB_HOME%" -Dant-orabpel.dir="%OB_HOME%"`
`\utilities -Dplatform="%OB_PLATFORM%" -Dapps="%J2EE_APPLICATIONS%"`

Update line to:

```
set ANT_ARGS=-Dhome="%BPEL_HOME%" -Dbpel.home="%BPEL_HOME%" -Dant-orabpel.dir="
\utilities -Dplatform="%OB_PLATFORM%" -Dapps="%J2EE_APPLICATIONS%"
```

Task 15-2-3: Timeout Setting Adjustments

To further guard against timeouts and rollbacks during large service processing, timeout adjustment should be made here:

<ORACLE_HOME>\j2ee\oc4j_soa\config\transaction-manager.xml

- `<ORACLE_HOME>\j2ee\oc4j_soa\config\transaction-manager.xml`

```
<transaction-manager
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:noNamespaceSchemaLocation="http://xmlns.oracle.com/oracleas/schema⇒
/transaction-manager-10_0.xsd"
  transaction-timeout="30000"  Update to 30000
max-concurrent-transactions="-1"
```

Task 15-2-4: Changing ORABPEL Schema for PeopleSoft Worklist

To support the PeopleSoft BPEL Worklist integration:

1. Increase the size of the PROPERTIES column in the DLV_MESSAGE table (found in the ORABPEL schema).

   The default column width is 1000 characters.

2. Alter this column and indicate that it can hold at least 2000 characters.

   For example, using a SQL tool, the following SQL can be used to change the column size:

   ```
   alter table ORABPEL.DLV_MESSAGE modify PROPERTIES varchar2(2000)
   ```

   The column width of 2000 characters is only a starting point.

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Note. If your PeopleSoft Worklist integration exchanges large amounts of data, the 2000 size may not be sufficient. You can configure a maximum column size of 4000 characters.

Task 15-2-5: Verifying Required Message Container Definitions

This section discusses:

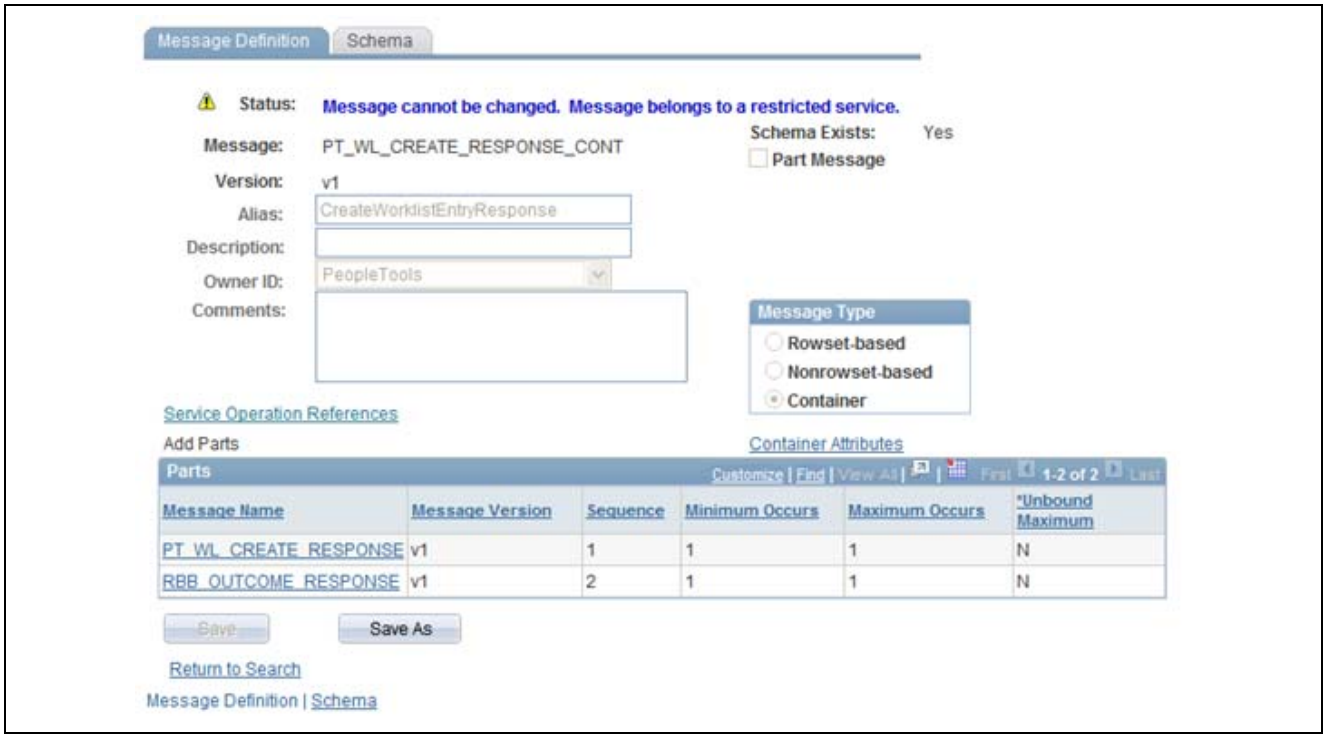
- Verifying the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE Message Parts
- Adding the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE Message Parts

Important! If you are installing or upgrading PeopleSoft PeopleTools, you must verify that the required message container definitions are present. Follow the instructions in the step *Verifying the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE Message Parts*.

Verifying the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE Message Parts

To verify that the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE message parts are present, do the following:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages. Verify that the message response PT_WL_CREATE_RESPONSE_CONT.V1 is present and appears as shown in the following example:



Message response PT_WL_CREATE_RESPONSE_CONT.V1

2. Verify that the message request PT_WL_CREATE_REQUEST_CONT.V1 is present and appears as shown in the following example:

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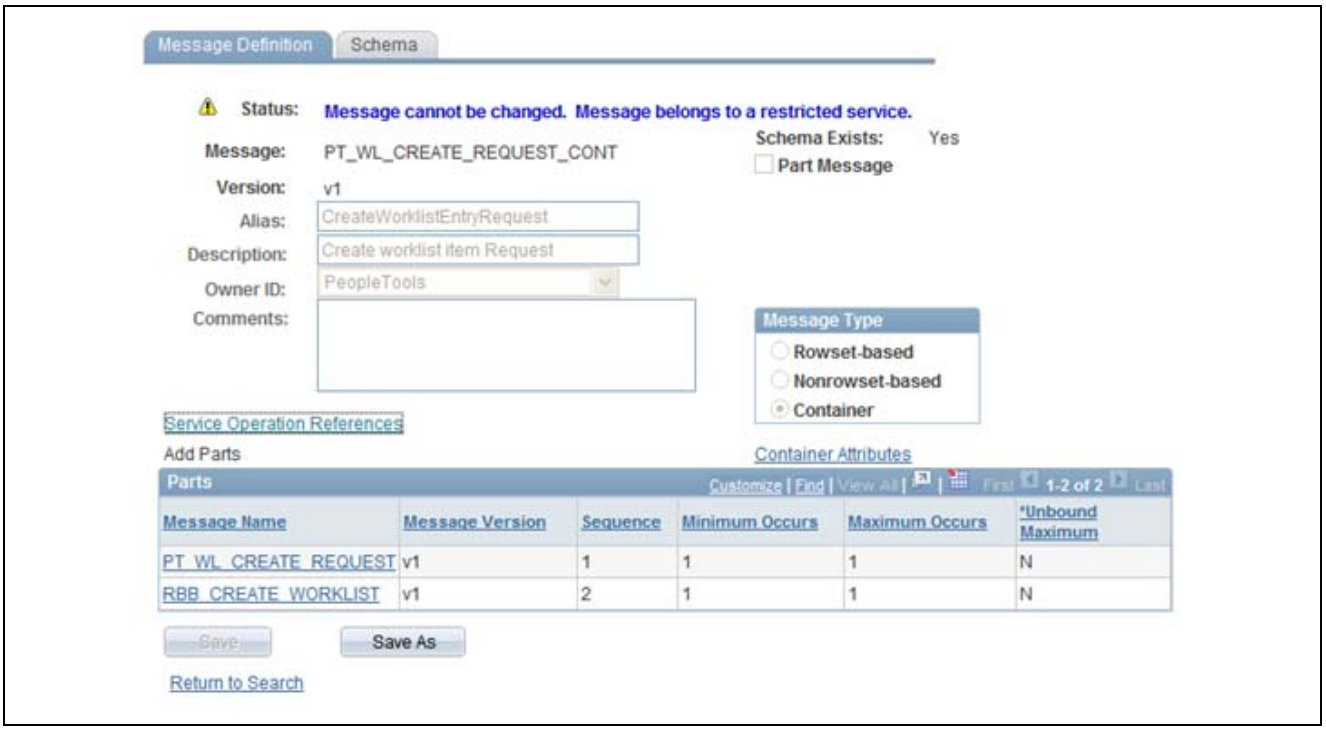

Message request PT_WL_CREATE_REQUEST_CONT.V1

Important! If the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE message parts are *not* present, then they must be added before the BPEL processes can properly deploy. Follow the instructions in the step *Adding the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE Message Parts*.

Adding the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE Message Parts

To add the RBB_CREATE_WORKLIST and RBB_CREATE_RESPONSE message parts, do the following:

1. Select PeopleTools, Integration Broker, Configuration, Service Configuration, and select the Restricted Services tab.

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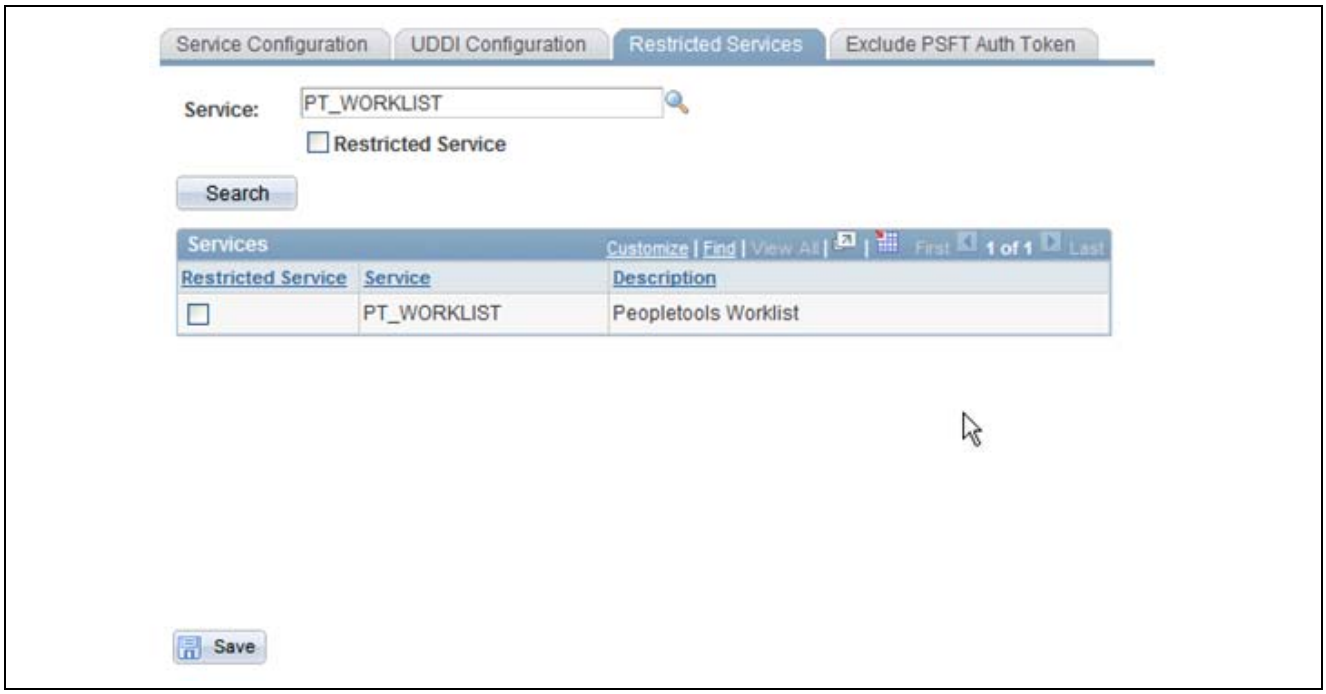
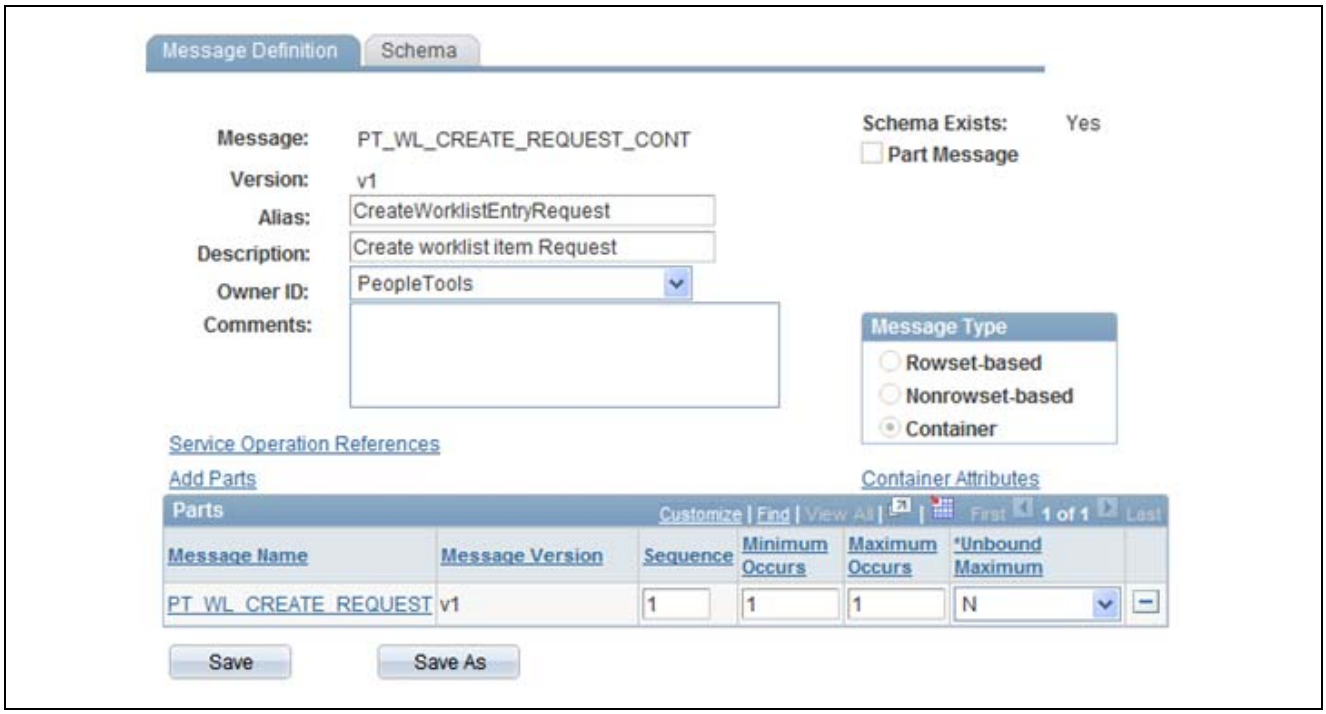


Integration Broker - Service Configuration: Restricted Services tab

2. On the Restricted Services tab, search for the PT_WORKLIST service, and then clear (deselect) the Restricted Service check box.
3. Click Save.
4. Select PeopleTools, Integration Broker, Integration Setup, Messages, and open the message PT_WL_CREATE_REQUEST_CONT.V1.



Integration Broker - Integration Setup: Message Definition

5. Click the Add Parts link and select RBB_CREATE_WORKLIST.

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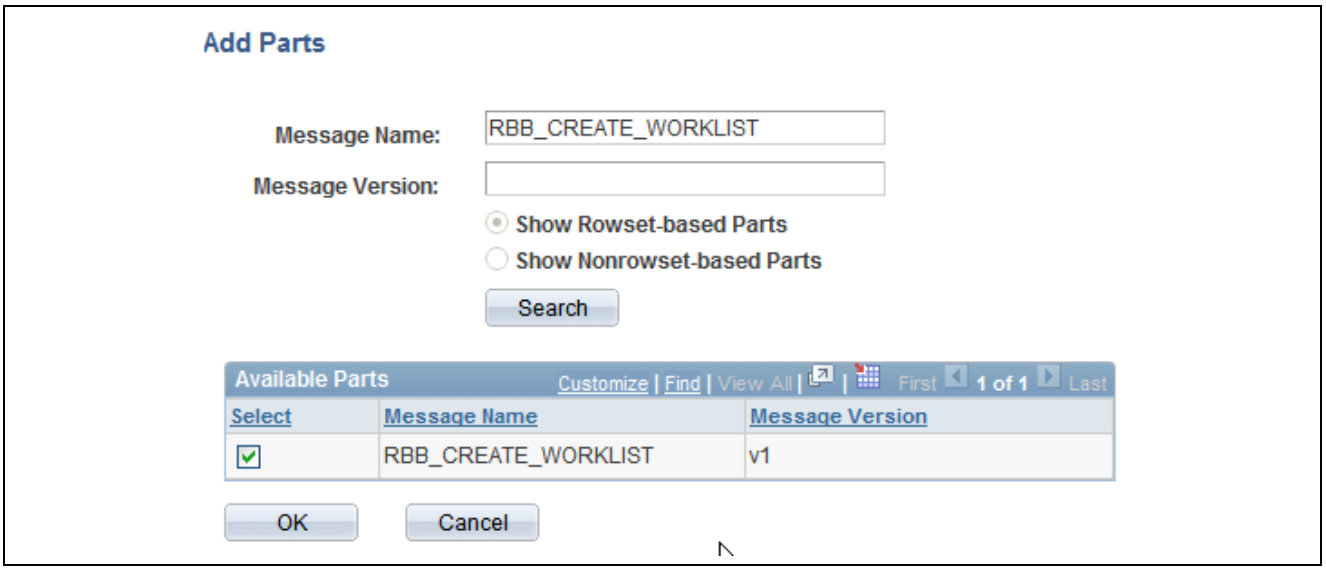
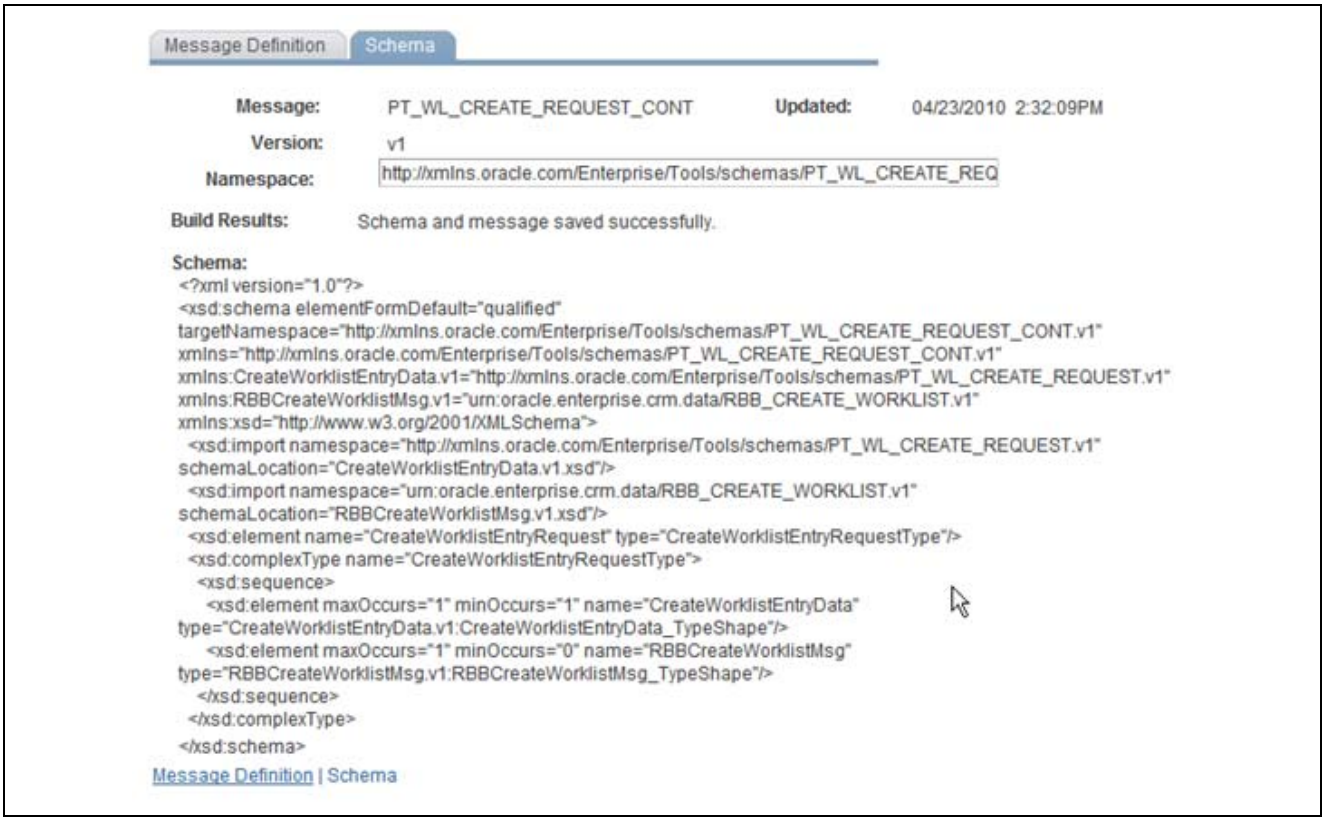


Integration Setup: Message Definition - Add Parts

6. Click OK and then click Save to save the message definition.
7. Select the Schema tab and ensure that RBB_CREATE_WORKLIST now appears in the schema.



Integration Broker - Integration Setup: Schema

8. Select PeopleTools, Integration Broker, Integration Setup, Messages, and open the message PT_WL_CREATE_RESPONSE_CONT.V1.
9. Click the Add Parts link and select RBB_OUTCOME_RESPONSE.
10. Click OK and then click Save to save the message definition.

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11. Select the Schema tab and ensure that RBB_OUTCOME_RESPONSE now appears in the schema.

Task 15-3: Restarting the Instance

Reboot the machine or restart the middle-tier instance for all configuration settings to take effect. You can refer to the OracleMiddle-Tier OAS documentation for details on how to perform this operation.

If the JDeveloper BPEL Process Manager is used, simply stopping and restarting the BPEL Process Manager is all that is required.

For example, in a Microsoft environment:

1. Select Start/Programs/<your installation name given at install time>/Oracle BPEL Process Manager 10.1.3.3.1/Stop BPEL PM Server.

   The BPEL PM Server is waiting for the Oracle BPEL Process Manager to shutdown.

2. Then select Start/Programs/<your installation name given at install time>/Oracle BPEL Process Manager 10.1.3.3.1/Start BPEL PM Server.

Ensure that your BPEL Process Manager completes initialization before you begin the steps that follow.

Task 15-4: Recording Access Information

Note the host and port information that is used to access your BPEL Process Manager. This information is used later when you configure the BPEL processes for deployment. The host and port information is the same as the information that you used when accessing the BPEL Console.

For example, the default URL for accessing the BPEL Console from a JDeveloper installation is:

http://yourhostname:9700/BPELConsole

Where the hostname is *yourhostname* and the port is *9700*. For the JDeveloper BPEL Process Manager, the port used is always 9700; however, the port used by the middle-tier product is configurable.

Task 15-5: Creating and Configuring a BPEL Domain

This section discusses:

- Understanding BPEL Domain Configuration
- Creating a New BPEL Domain
- Setting the Domain auditLevel

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Understanding BPEL Domain Configuration

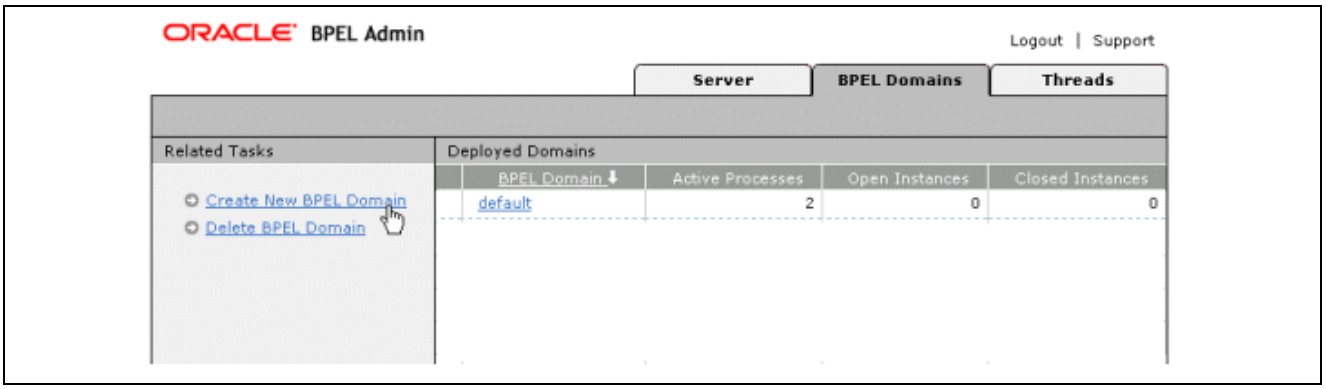
This task involves the creation of a BPEL domain to which you will deploy the PeopleSoft CRM BPEL processes. It is possible to use the default domain that is delivered with the BPEL PM installation; however, Oracle recommends that you create a new BPEL domain for this installation.

Note. The BPEL Process Manager must be available to perform the following steps. You must start the BPEL Process Manager before you create the BPEL domain and remain available throughout the BPEL deployment process.

Task 15-5-1: Creating a New BPEL Domain

Through the BPEL Administrator console (http://yourhostname:port/BPELAdmin) , perform the following steps:

1. Select the BPEL Domains tab, and then click the Create New BPEL Domain link, as shown in the following example:



BPEL Admin - BPEL Domains page

2. Create an installation domain and note both the Domain ID and the password that you specify (these values are used later in the PeopleSoft configuration).
3. Use the default values populated in the other fields on the Create New BPEL Domain form.
4. Click the Create button.
5. When a popup window appears asking for confirmation of data, click the OK button to confirm.

   Wait for the window to indicate that the creation of the new domain is complete.

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

Task 15-5-2: Setting the Domain auditLevel

The auditLevel property controls the number of audit events logged by a process. This property greatly impacts the performance, due to the additional auditing events inserted into the database for a process. This audit information is only for viewing purposes from the BPEL Console to show the state of the process. This configuration property default value is *development.* Change this to *production.* With this new value, all events are logged. The audit details for <assign> activities alone are not logged.

To change the configuration property default value:

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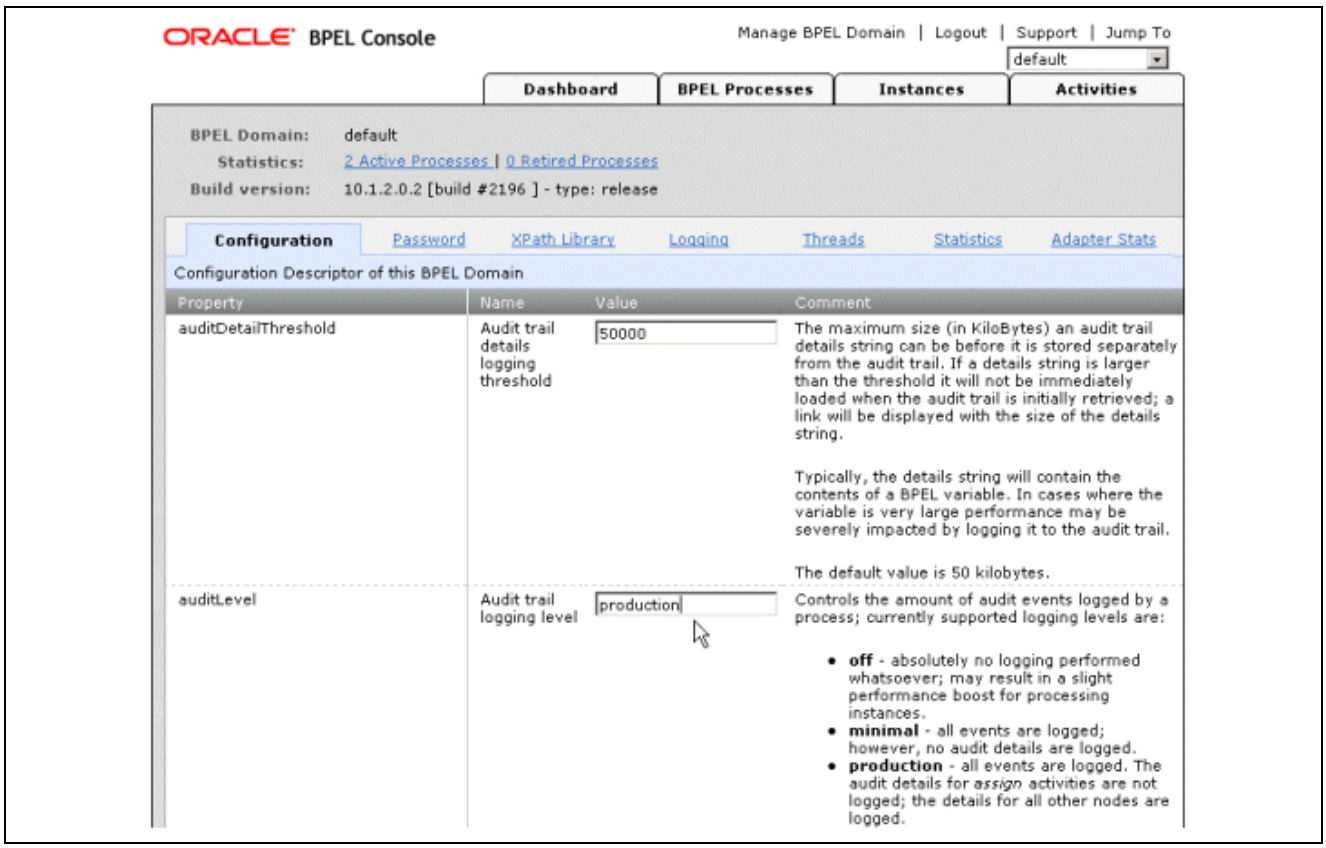
1. Log into the domain through the BPEL Console (http://yourhostname:port/BPELConsole).
2. Click the Manage BPEL Domain link (top of the page).

   The Oracle BPEL Console page appears.
3. On the Configuration tab, change the auditLevel property to *production*, as shown in the following example:



BPEL Console - Configuration page

4. Update the syncMaxWaitTime setting from 45 to 240 to avoid timeout issues.
5. Click Apply to activate the settings.

Task 15-6: Configuring PeopleSoft for BPEL Integration

This section discusses:

- Understanding PeopleSoft BPEL Configuration
- Configuring a Special PeopleSoft Environment
- Configuring the PeopleSoft Integration Broker Gateway
- Confirming PeopleSoft Integration Broker Access
- Configuring Service Settings
- Configuring the BPEL Node

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- Updating the BPEL Process End Points
- Configuring the PeopleSoft Worklist Web Service
- Activating Web Services
- Configuring the PeopleSoft BPEL End User Monitor
- Restarting PeopleSoft Environment
- Verifying PeopleSoft Integration Broker Access

Understanding PeopleSoft BPEL Configuration

Oracle recommends that you configure a special application/web server environment as a dedicated environment for providing PeopleSoft CRM services. This ensures that user interaction with the PeopleSoft Pure Internet Architecture environment does not affect the performance of the service operations. However, for simple environments, it is acceptable to use the default local PeopleSoft Integration Broker Gateway and the application servers used by PeopleSoft Pure Internet Architecture.

Note. The remainder of the installation steps require that the PeopleSoft Pure Internet Architecture environment is available. Administrators must be able to log into the environment to configure PeopleSoft Integration Broker. Also, the deployment process performed on the BPEL Process Manager requires access to PeopleSoft service details that are accessed through PeopleSoft Integration Broker. Ensure that the PeopleSoft environment is completely available throughout the remainder of the installation.

Task 15-6-1: Configuring a Special PeopleSoft Environment

In this task, you can configure a special web and application server environment to provide PeopleSoft services.

Note. Skip this step if the existing PeopleSoft environment being used by PeopleSoft Pure Internet Architecture users will be used by service operations.

See Also

PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft Integration Broker.

Task 15-6-2: Configuring the PeopleSoft Integration Broker Gateway

The delivered BPEL processes expect the application server (where the PeopleSoft services are executed) to be the default application server for the Integration Broker Gateway that is associated with the URL (used for Service Operations).

To configure the default application server:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Perform one of the following:
   - If you are creating a special application server for service operations, create a new gateway with the hostname/port URL that you configured as part of the previous task.
   - If you are using a single application server environment, confirm the local gateway URL for the proper configuration.

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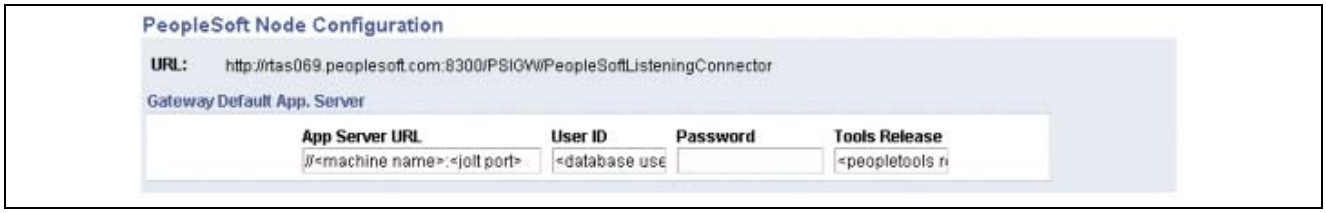
3. Go to the Gateway Setup Properties (follow the instructions on the login page), and then configure the default application server for the application server that you are using, as shown in the examples that follow:

Gateways page



PeopleSoft Node Configuration page

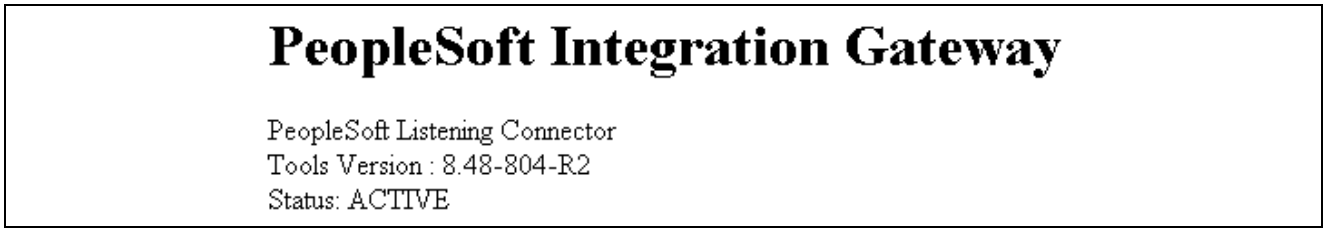
Refer to the PeopleSoft Integration Broker PeopleBook for instructions on how to configure the Integration Broker to set up a gateway.

Task 15-6-3: Confirming PeopleSoft Integration Broker Access

After you configure the environment, you can *ping* the PeopleSoft Integration Broker gateway by using the host/port information for the environments application server. From a browser, enter the following type of URL:

http://yourhostname:port/PSIGW/PeopleSoftListeningConnector

If you see the PeopleSoft Integration Gateway with an output stating the status is Active in the browser, the PeopleSoft Integration Broker is available for further configuration, as shown in the following example:



PeopleSoft Integration Gateway - Active status

Note. Remember the hostname and port information for your PeopleSoft Integration Broker. You will use this information later to configure the BPEL processes for deployment.

Task 15-6-4: Configuring Service Settings

To change the default service configurations:

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

   The Service Configuration page appears.

2. On the Service Configuration page, change the following fields:

   a. In the Service Namespace field, enter *urn:oracle.enterprise.crm.servic.*.

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b. In the Schema Namespace field, enter *urn:oracle.enterprise.crm.data*.

c. In the Target Location field, enter *http://yourhostname:port/PSIGW /PeopleSoftServiceListeningConnector*.

The following shows an example of the Service Configuration page:

Service Configuration page

Note. The Target Location URL uses PeopleSoftServiceListeningConnector, contrary to the PeopleSoftListeningConnector that was used as part of the PeopleSoft Integration Broker Setup.

Task 15-6-5: Configuring the BPEL Node

The PeopleSoft Integration Broker node, BPEL, communicates to the BPEL engine. You must properly configure this node to point to the BPEL Process Manager as follows:

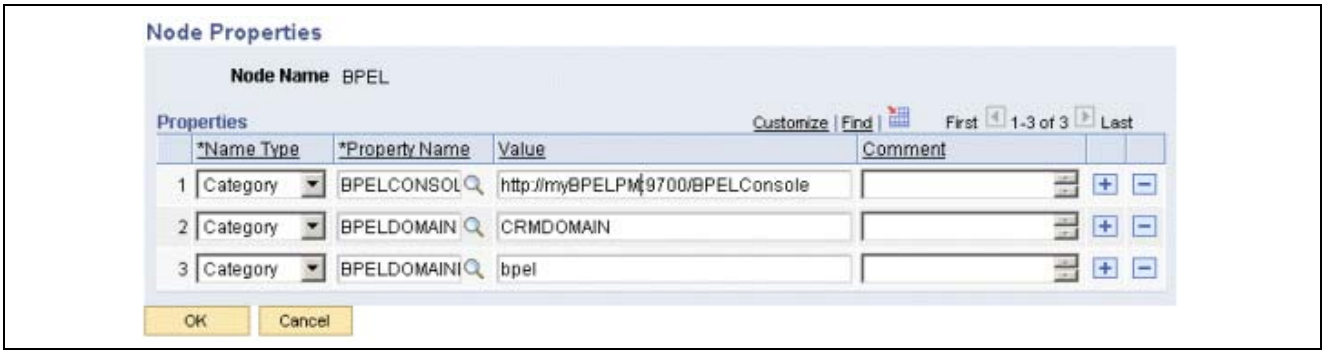
1. Select PeopleTools, Integration Broker, Integration Setup, Nodes and open the BPEL node.

   The BPEL Nodes page appears.

2. Click the Properties link.

   The Node Properties page appears.

3. Enter the information as shown in the following example of the Node Properties page:



Node Properties page

a. BPEL Console URL (used earlier to configure the domain)

b. BPEL Domain (target deployment domain)

c. BPEL Domain Password

4. Ensure that you have completed all of the steps in the Chapter 1 task titled “Setting Up PeopleSoft Integration Broker,” to include updating the Default User IDs on select nodes.

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Task 15-6-6: Updating the BPEL Process End Points

The delivered services have end point addresses that use the tokens <*host:id*> and <*domain*> in the URL. You must replace these with the actual end point for the BPEL Process Manager environment that you are configuring. A special convenience utility is available for replacing all of the service routings for the designated node to point to the environment information configured in the previous step.

To configure the BPEL process end point addresses:

1. Select Set Up CRM, Common Definitions, Business Process, Infrastructure, Update End Point Addresses.

   The Update End Points page appears.

2. Review the BPEL Process Manager hostname and port information in the Base URL, as well as the BPEL domain value in the Domain field.

3. On the Update End Points page, enter *BPEL* in the Node field and click Continue, as shown in the following example:

Update End Points page

Note. If you make a mistake or your environment changes, you can update all service routings associated with the BPEL node by selecting the Replace All check box *prior* to clicking Continue. This updates all message routings, regardless of whether these message routings are tokenized.

Task 15-6-7: Configuring the PeopleSoft Worklist Web Service

You must include the PeopleSoft CRM part messages in the PeopleSoft Worklist web service operation message containers. This enables PeopleSoft Worklist web service to pass BPEL process-specific parameters, when creating a new PeopleSoft Worklist in the PeopleSoft application, and send a PeopleSoft Worklist outcome response back to the BPEL process that created the PeopleSoft Worklist.

The inclusion of these messages is a required configuration for a new installation. Including these messages is also required whenever the modified version of the PeopleSoft Worklist service container messages are delivered through a PeopleSoft PeopleTools upgrade.

After you include the correct PeopleSoft CRM part messages in the corresponding PeopleSoft PeopleTools-delivered web service operation containers, you must regenerate the schema.

Include PeopleSoft CRM part messages in the PeopleSoft Worklist web service operation message container as follows:

1. Remove the restriction on PT_WORKLIST web service to enable updating of the data.

   PT_WORKLIST web service is delivered restricted, preventing users from updating the configuration setting.

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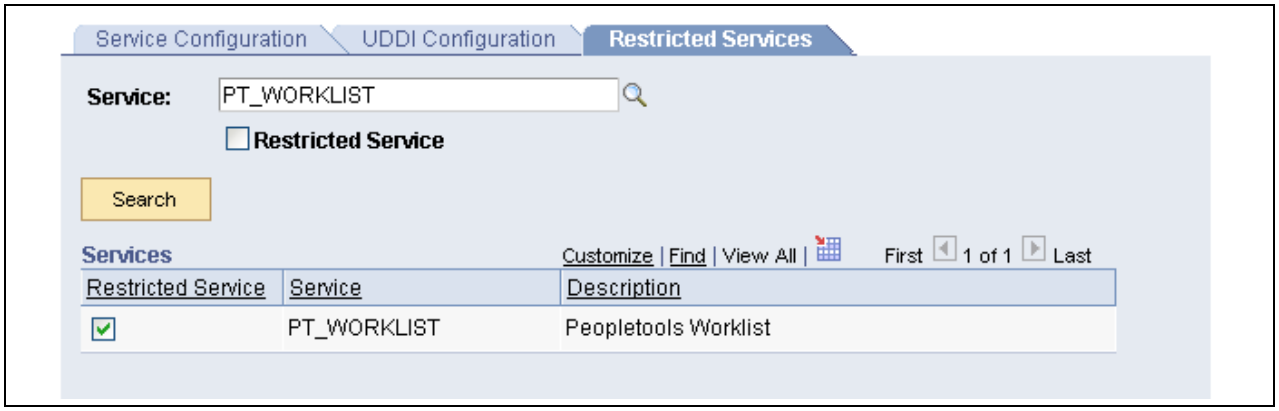
a. To update the content, select PeopleTools, Integration Broker, Configuration, Service Configuration.

The Service Configuration page appears.

b. Select the Restricted Services tab. On the Restricted Services page, enter *PT_WORKLIST* then click Search.

The service PT_Worklist displays in the Restricted Services search results, as shown in the following example:



Restricted Services page

c. Clear the Restricted Service check box for the PT_WORKLIST web service, and save the page.

d. Return to the Service Configuration page and verify that the service system status is set to *Development*.

2. Add the RBB_CREATE_WORKLIST message part to the PT_WL_CREATE_REQUEST_CONT message container.

Note. If the RBB_CREATE_WORKLIST message part is already present in PT_WL_CREATE_REQUEST_CONT, you may skip this specific step.

---

a. To generate the schema of the part message, select PeopleTools, Integration Broker, Integration Setup, Messages.

b. Search for RBB_CREATE_WORKLIST.

c. Go to the Schema page and click the Build Schema button.

d. Confirm the namespace by clicking the OK button; the system generates the message schema.

e. To add a part message to the container message, select PeopleTools, Integration Broker, Integration Setup, Messages.

f. Search for the PT_WL_CREATE_REQUEST_ CONT message container.

g. Click the Add Parts link and select the *RBB_CREATE_WORKLIST* message and message version number.

h. Designate a sequence number that is greater than the one assigned to PT_WL_CREATE_REQUEST_ CONT message, along with the parameters shown in the following example:

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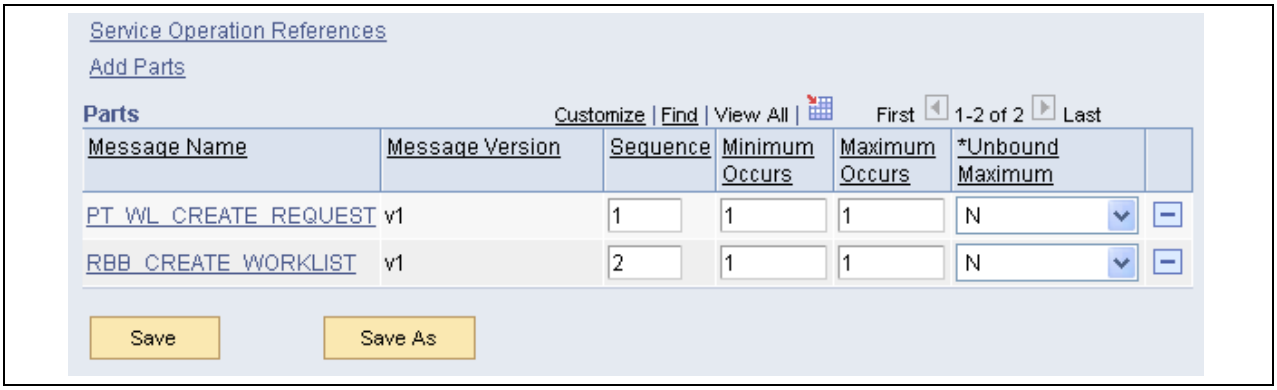
Schema page

This table provides the parameters on the Schema tab:

Message	Version	Namespace
RBB_CREATE_WORKLIST	v1	http://xmlns.oracle.com/Enterprise /Tools/schemas/RBB_CREATE_ WORKLIST

i. Save the page to generate the schema of the reconfigured message container, as shown in the following example:



RBB_CREATE_WORKLIST part message in the PT_WL_CREATE_REQUEST_CONT container message

3. Register the CRM handler and RBBHandler to the CREATE_WORKLIST_ITEM service operation.

To use the PeopleSoft CRM handler to process web service requests for creating the PeopleSoft Worklist, you must disable the PeopleSoft PeopleTools NOTIFY handler and register the PeopleSoft CRM handler using the following steps:

Note. If the RBBHandler is already present with an *Active* status, and the PeopleSoft PeopleTools NOTIFY handler is *Inactive*, you can skip this specific step.

---

a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for PT_WORKLIST.

b. Click the CREATE_WORKLIST_ITEM operation link to open the operation details.

The Service Operation General page appears.

c. Select the Handlers tab to access the Handlers page.

d. Set the status of the PeopleSoft PeopleTools NOTIFY handler to *Inactive* and add the PeopleSoft CRM-specific handler, RBBHandler, with a status of *Active.* In the following example of the Handlers

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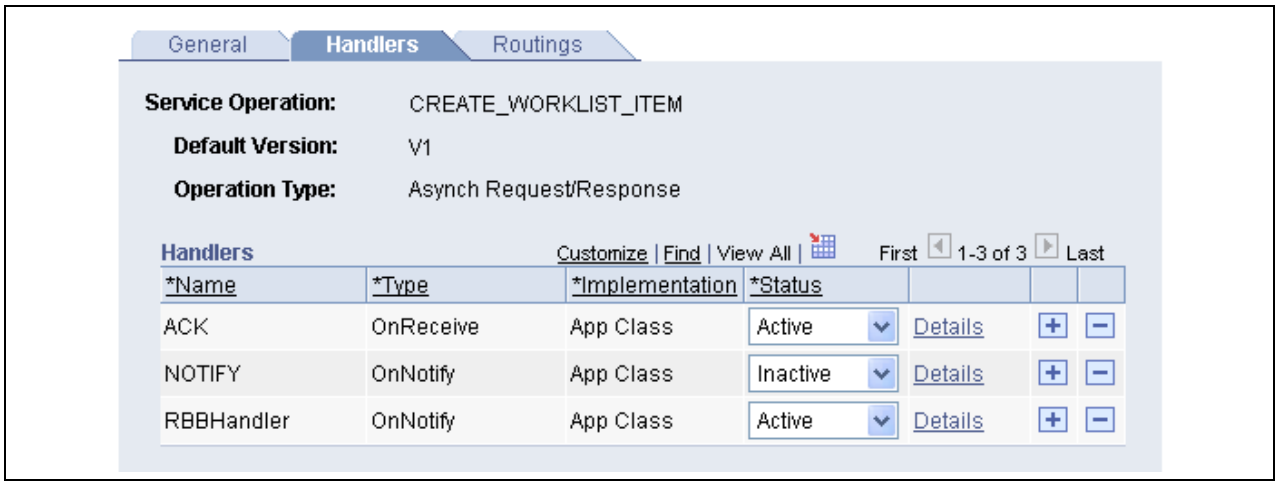
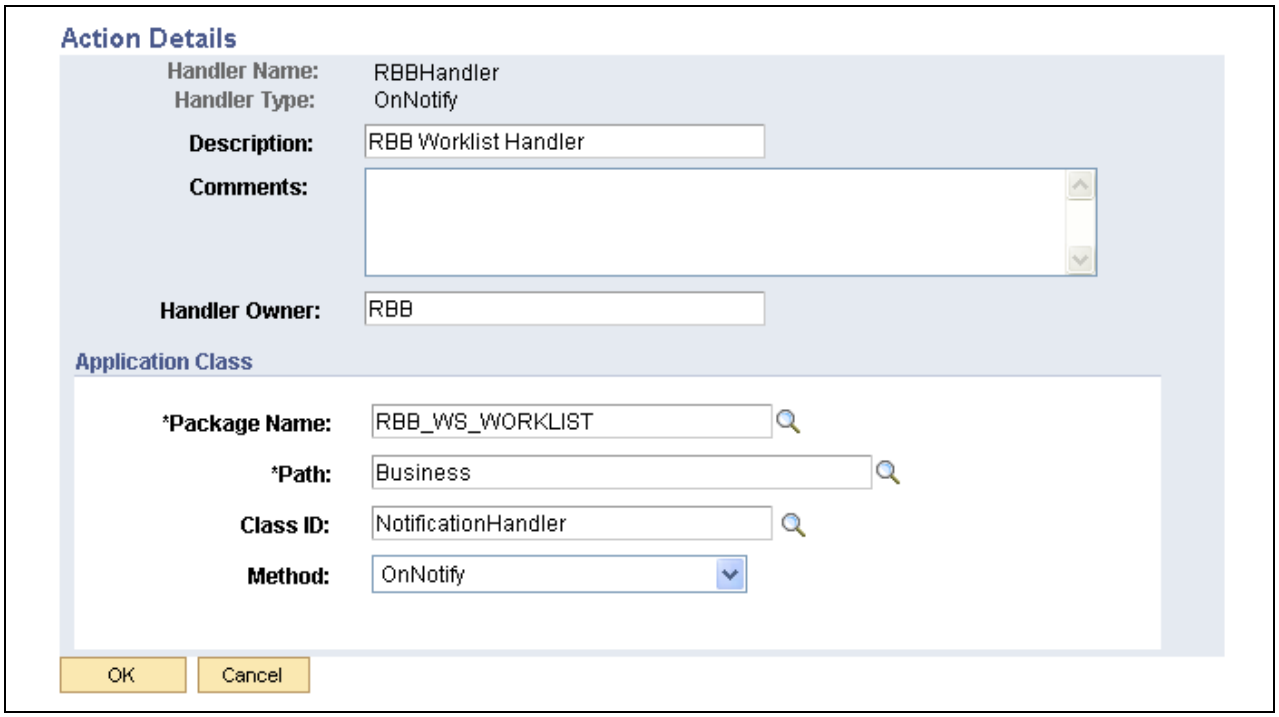
page, note that the ACK handler is delivered by PeopleSoft PeopleTools and should maintain an *Active* status at all times:



Service Operations - Handlers page

e. Click Save to save the page.

f. Click the Details link in the RBBHandler row, enter the action detail parameters as shown in the following example:



Action Details page

g. Click Save to save the page.

4. Add the RBB_OUTCOME_RESPONSE message part to the PT_WL_CREATE_RESPONSE_CONT message container.

Note. If the RBB_OUTCOME_RESPONSE message part is already present in PT_WL_CREATE_RESPONSE_CONT, you can skip this specific step.

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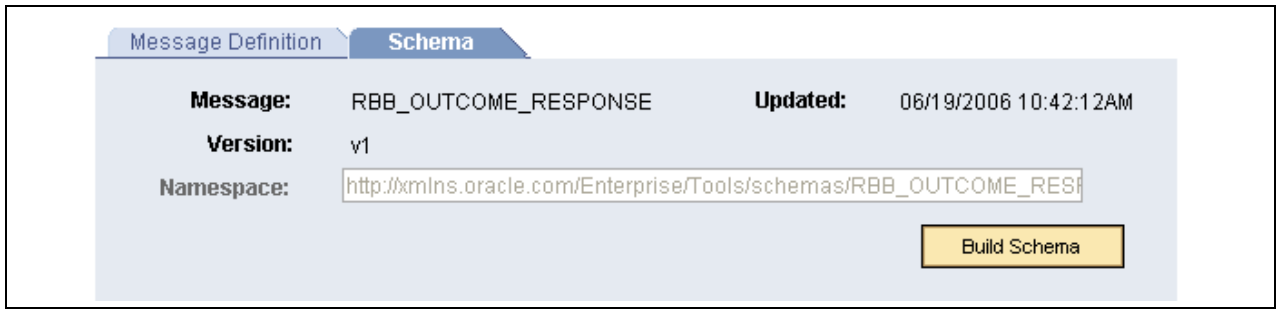
a. To generate the schema for the RBB_OUTCOME_RESPONSE part message, select PeopleTools, Integration Broker, Integration Setup, Messages, and then search for RBB_OUTCOME_RESPONSE, as shown in the following example:



Schema page

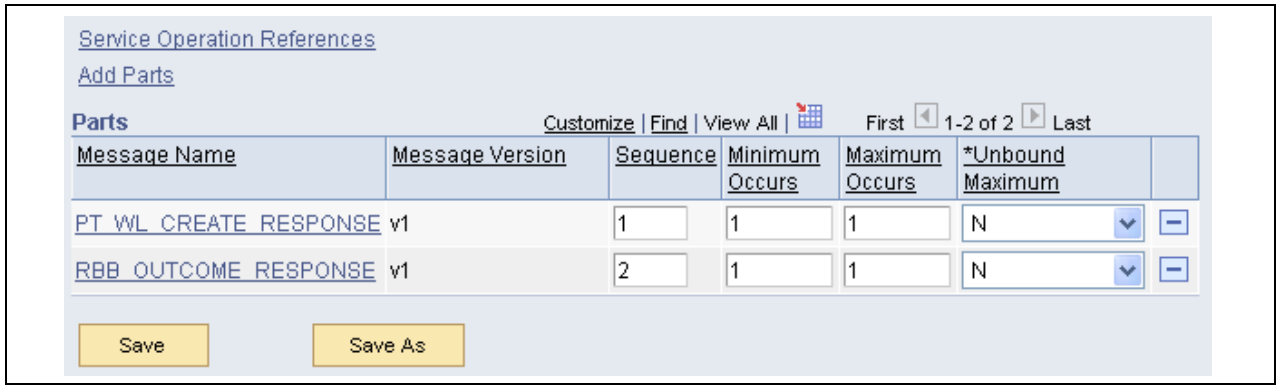
b. Select the Schema tab to access the Schema page, and then click the Build Schema button.

c. Click the OK button to confirm the namespace; the system generates the message schema.

d. Select PeopleTools, Integration Broker, Integration Setup, Messages and search for the PT_WL_CREATE_RESPONSE_CONT message container.

e. Click the Add Parts link and select the *RBB_OUTCOME_RESPONSE* message.

f. Designate a sequence number that is greater than the one assigned to the PT_WL_CREATE_ RESPOSNE_CONT message and enter the parameters shown in the following example:



RBB_OUTCOME_RESPONSE part message in the PT_WL_CREATE_RESPONSE_CONT container message

g. Save the page to regenerate the schema of the reconfigured message container.

5. Regenerate the WSDL of the PT_WORKLIST web service.

Note. If you skipped Steps 2 and 4 in this section, skip this specific step (list step #5) and continue.

---

a. Select PeopleTools, Integration Broker, Web Services, Provide Web Services.

b. Enter *PT_WORKLIST* for the service name, click Search, and then click NEXT button.

c. Select both CREATE_WORKLIST_ITEM.v1 and GETWLINSTANCE.v1 Sevice operations and click NEXT.

d. Review the new WSDL as necessary; and click the NEXT button to publish the WSDL.

e. Click the Finish button to publish the new WSDL into the PeopleSoft WSDL Repository, as shown in the following example:

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Generate SOAP template

f. Click the Generate SOAP Template button, to generate the SOAP template.

6. Change the Service System Status value to *Production* and restrict the PT_WORKLIST web service to prevent unauthorized updates.

   After you add PeopleSoft CRM part messages to the PeopleSoft PeopleTools worklist message containers, and their corresponding schema and WSDLs are generated correctly, restrict the users from updating the service data by restricting access to the PT_WORKLIST web service as follows:

   a. Select PeopleTools, Integration Broker, Configuration.

      The Configuration page appears.

   b. Select the Restricted Services tab to access the Restricted Services page.

   c. Select the Restricted Service check box, and then save the page.

Important! The updates to the PT_WORKLIST messages are the *only* required changes for PeopleSoft BPEL set up. No other message parts, schemas, or namespaces should be changed. Making any other changes to the PT_WORKLIST messages will result in errors during the deployment of PeopleSoft delivered BPEL processes.

Task 15-6-8: Activating Web Services

Understanding Web Service Activation

This section involves activating the required web services to support the BPEL process deployment and runtime operations. There are three categories of web services that you must activate for the complete BPEL integration: PeopleSoft PeopleTools, BPEL Infrastructure, and application-specific. You must activate PeopleSoft PeopleTools and BPEL Infrastructure web services during this installation step; you can defer application-specific web service activation.

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To activate the web services that we mentioned in this section:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Enter the service operation that you want to activate in the Service Operation field and click Search.
3. Select the service operation from the results area.

   The Service Operations - General page appears.
4. Select the Active field.

   Note. For asynchronous operations, remember the queues found in the Message Information section so that you can place these queues in a *running* state in a later step.
5. Select the Handlers tab to access the Handler page.
6. Ensure that any handler listed is set to *Active* (with the exception of the CREATE_WORKLIST_ITEM service operation, covered in a previous task).
7. Select the Routings tab to access the Routings page.
8. Ensure that the listed routing has a status of *Active* (if multiple routings exist, only one should be active).

   If the routing for the service operation does not have a status of *Active*, select the routing to be activated (use the first routing if multiple routings exist), and then click the Activate Selected Routings button.
9. Click Save.
10. For asynchronous service operations only, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status.

    The Queue Status page appears.
11. Ensure that the queue that the service operation uses is set to *Running* status.

    If the queue is not running, click the corresponding Run button.

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

Note. As a reminder, ensure that the handlers and routings are activated for the service operations. Activating the service operation does not automatically activate the corresponding handlers or routings. If an operation, handler, routing or queue is already active, no action is required for that item.

See *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services."

Confirming PeopleSoft PeopleTools Web Service

For basic BPEL process deployment and typical BPEL process operations, you must activate the following PeopleSoft PeopleTools Service Operations and their corresponding routings:

- CREATE_WORKLIST_ITEM
- GETROUTINGS
- GETSCHEMA
- GETWLINSTANCE
- GETWSDL
- GETWSIL

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- GETXSLT
- SAVEXSLT

Ensure that the following corresponding PeopleSoft Integration Broker Queues are in a *Running* state:

- IB_CHNL
- IB_GENERIC
- WORKLIST_CHNL
- WSDL_QUEUE

To verify whether a queue is running:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Queue Status.

   The Queue Status page appears.
2. Click the Find link in the Queues grid.
3. Enter the *Queue Name* in the Search Box and click the OK button.
4. Ensure that the Status column shows the Queue status as *Running*. If the status is *Paused,* click the Run button next to the Status field.
5. Save your changes.

Activating BPEL Infrastructure Web Services

Some common web services are used across the applications that are considered part of the BPEL infrastructure. Activate the following service operations:

- RBB_HOUSEKEEPING_SO
- RBBSYNCPROCESS
- INITIATESAMPLEWORKLIST
- INITIATESTRUCTUREDWORKLIST
- INITIATEUNSTRUCTUREDWORKLIST
- INITSAMPLESTRUCTUREDWORKLIST

The *RBB_QUEUE* queue must also be set to a *Running* state. If the Queue is *Paused,* follow the steps previously discussed to start the queue.

Activating Application-Specific Web Services

You can activate the web services for your particular applications. Activation of these web services is not required for the BPEL integration installation. You can perform these activations after your environment is configured. Refer to your application-specific PeopleSoft PeopleBooks for the list of web service operations that you must activate.

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Delivered Web Services and Service Operations."*

See *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Delivered Web Services and Service Operations."*

See *PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Business Object Delivered Web Services."*

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See *PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Delivered Web Services and Service Operations."*

See *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Order Capture Delivered Business Processes and Web Services."*

See *PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Delivered Business Processes and Web Services."*

See *PeopleSoft Sales 9.1 PeopleBook, "Sales Delivered Business Processes and Web Services."*

See *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook, "Delivered Web Services and Service Operations."*

See *PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook, "Delivered Web Service and Service Operations."*

See *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook, "Delivered Web Service and Service Operations."*

Task 15-6-9: Configuring the PeopleSoft BPEL End User Monitor

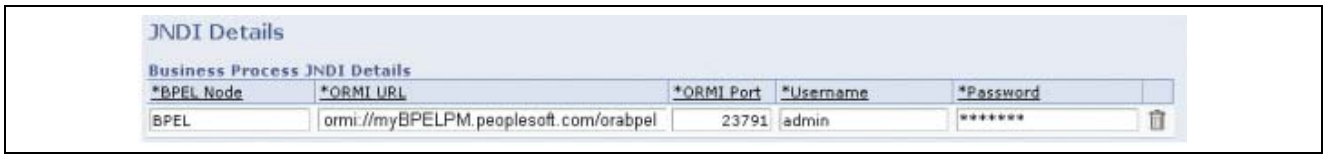
This section involves the steps that enable the PeopleSoft BPEL End User Monitor, as well as some other minor features. These steps include configuring JNDI access to the BPEL Process Manager, as well as copying over BPEL supporting Java classes.

JNDI access is required to the BPEL Process Manager to support the PeopleSoft BPEL End User Monitor feature (and some other minor features). The information for JNDI was part of the configuration performed when setting up the BPEL Process Manager. Given that information, we now configure PeopleSoft to access the BPEL Process Manager.

To configure JNDI access and copy over the BPEL supporting Jave classes:

1. Select Set Up CRM, Common Definitions, Business Process, Infrastructure, JNDI Details.

   The JNDI Details page appears, as shown in the following example:



JNDI Details page

2. Configure the BPEL node JNDI access by entering the following information:
   - In the BPEL Node field, enter *BPEL*.
   - In the ORMI URL field, enter *ormi://<host>/orabpel*.

     Note that no port information is specified as previously performed.
   - In the ORMI Port field, enter *23791*, unless you have changed the ORMI port during the middle-tier installation.
   - In the Username and Password fields, enter the JNDI username and password information (not the BPEL domain).

     The defaults are *admin* and *welcome*, respectively.
3. Click Save to save your changes.

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4. Copy the BPEL support files using the following table as a guide.

   You must copy a number of files from the BPEL Process Manager environment into the PeopleSoft environment. These files are not included as part of the PeopleSoft installation. You should copy them not only during the initial installation of the BPEL integration, but also any time that you apply updates to the BPEL Process Manager environment. This ensures that the most current BPEL files are used.

   This table lists filenames and directories to assist you in copying the required files from the BPEL Process Manager environment into the <PS_APP_HOME>/class directory:

Filename	Directory
bpm-infra.jar bpm-services.jar dms.jar orabpel.jar orabpel-boot.jar orabpel-common.jar orabpel-thirdparty.jar xmlparserv2.jar **	<BPEL_PM_HOME>/integration/orabpel/lib
activation.jar ** bcel.jar ejb.jar jaas.jar javax77.jar jms.jar jmxri.jar jta.jar mail.jar ** servlet.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/j2ee/home/lib (for jdeveloper) *or* <BPEL_PM_HOME>/j2ee/home/lib (for middle-tier)
oc4jclient.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/j2ee/home (for jdeveloper) *or* <BPEL_PM_HOME>/j2ee/home (for middle-tier)

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Filename	Directory
ojdl.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/diagnostics/lib (for jdeveloper) *or* <BPEL_PM_HOME>/diagnostics/lib (for middle-tier)
optic.jar	<BPEL_PM_HOME>/integration/jdev/opmn/lib (for jdeveloper may not be available) *or* <BPEL_PM_HOME>/opmn/lib (for middle-tier)

Two astericts (**) indicate jar files in <*PS_APP_HOME*>/class with same name as PeopleSoft jar files that you should *not* overwrite.

Warning! Do *not* overwrite the PeopleSoft jar files in the <PS_APP_HOME>/class directory with the BPEL Process Manager jar files.

Task 15-6-10: Restarting PeopleSoft Environment

After the configuration changes complete, do the following:

1. Restart the PeopleSoft environment for the settings to take effect.
2. Restart all facilities of the PeopleSoft environment.

   For example, the application server, web server, and the PeopleSoft Process Scheduler.

The configuration on the PeopleSoft side is now complete.

Task 15-6-11: Verifying PeopleSoft Integration Broker Access

After you restart the PeopleSoft environment, you can test access to a service's Web Service Definition Language (WSDL).

To test access and verify that the basic information required by the BPEL deployment tasks is available:

1. From a web browser on the BPEL Process Manager machine, enter the following URL address:

   http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector/PT_WORKLIST.1.wsdl
2. The result should display an XML document with this top-level tag element :<*wsdl:definitions*>.

   Any other result means that the PeopleSoft system is not correctly configured.
3. Verify that your PeopleSoft Integration Broker settings are correct and that all components of the PeopleSoft system (application servers and webservers) are available.

Task 15-7: Deploying PeopleSoft CRM BPEL Processes

This section discusses:

- Understanding PeopleSoft CRM BPEL Deployment

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

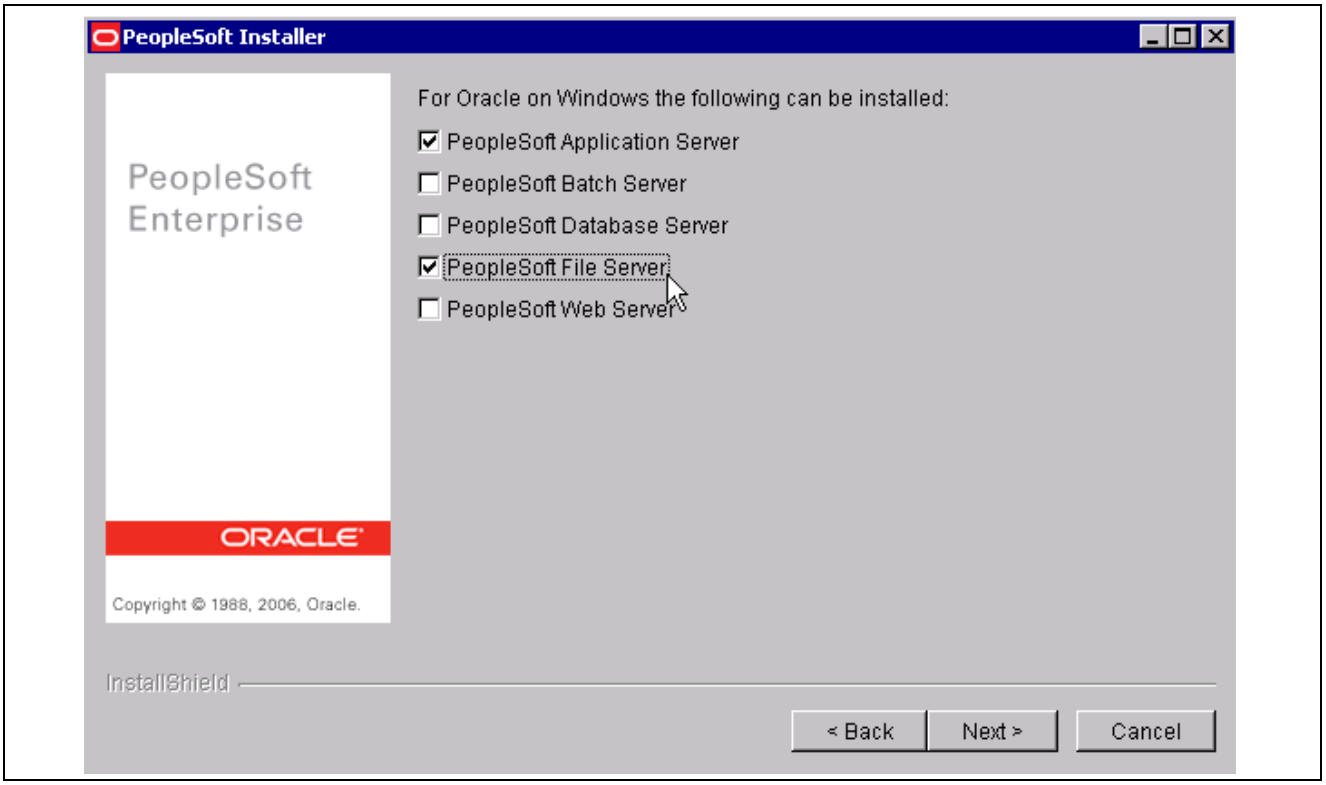
Understanding PeopleSoft CRM BPEL Deployment

This section discusses the initial deployment of all PeopleSoft CRM BPEL processes onto the BPEL Process Manager.

Note. You cannot complete this task until you complete all previous tasks and *both* the BPEL Process Manager and PeopleSoft Integration Broker are available.

Task 15-7-1: Copying BPEL Process Files

In the PeopleSoft installation directory (PS_APP_HOME), there should be a directory called bpel. The bpel directory is created during the PeopleSoft installation when you select the following installation options: PeopleSoft File Server and PeopleSoft Common Object, as shown in the following examples:



PeopleSoft Installer: the PeopleSoft File Server option must be selected

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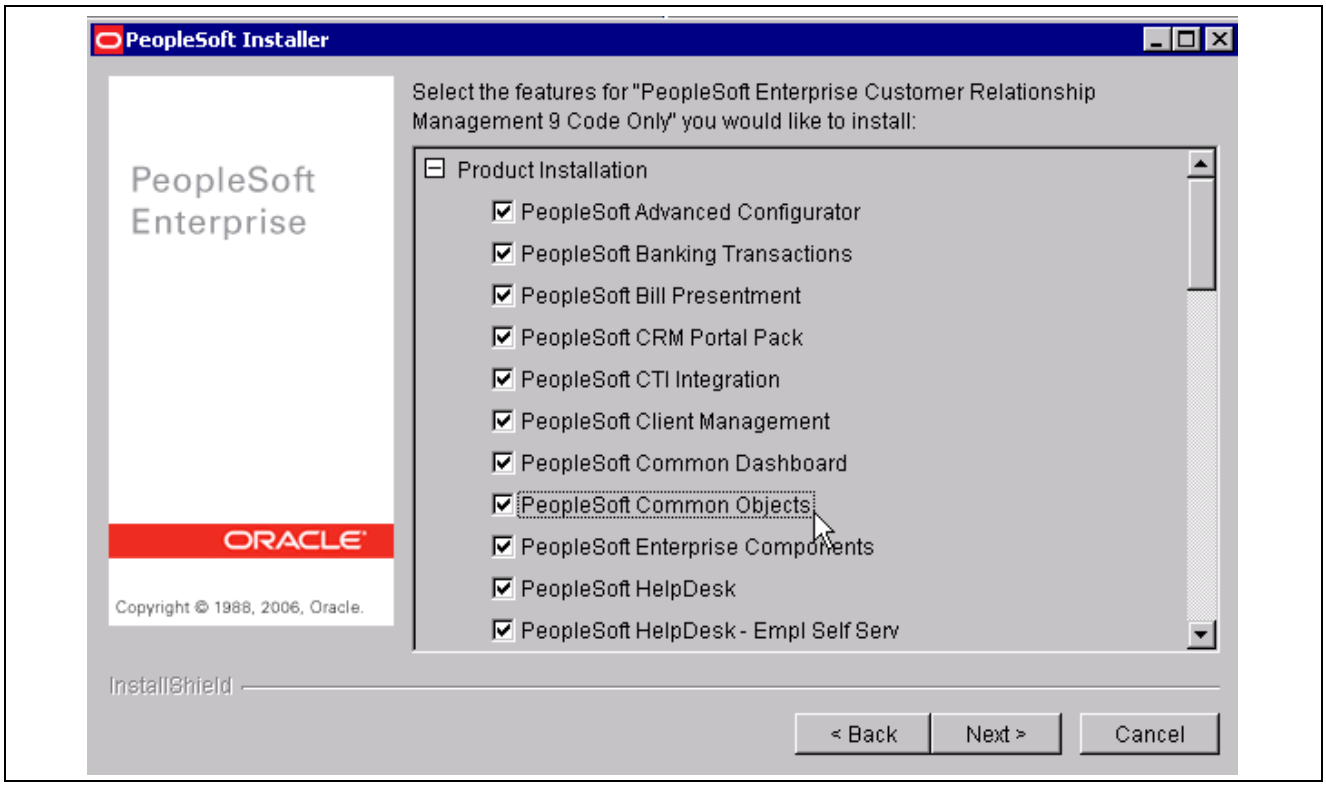

PeopleSoft Installer: the PeopleSoft Common Objects option must be selected

The bpel directory contains the BPEL process source files, as well as supporting files to be used to deploy the BPEL processes that are your target BPEL Process Manager machine.

You must copy these files over to the BPEL Process Manager as follows:

1. On your BPEL Process Manager machine, create a new directory in <BPEL_PM_HOME>/bpel named peoplesoft.
2. Copy the *contents* of the <PS_APP_HOME>/bpel directory over to the <BPEL_PM_HOME>/bpel peoplesoft directory on your target BPEL Process Manager machine.
3. After the copy is complete, the contents of the *peoplesoft directory* should be the same as the contents of the *bpel directory*.

The remainder of the tasks in this section are performed on the BPEL Process Manager machine.

Task 15-7-2: Configuring BPEL Process Files for Deployment

Editing install.properties

This task involves editing the install.properties file, found in <BPEL_PM_HOME>/bpel/peoplesoft. This file creates a set of deployable files for the environment that you created.

The delivered file appears as follows:

```
install.ps-host=<Integration Broker Host>
install.bpel-host=<your bpelpm machine>
install.bpel-port=<your bpelpm machine port>
install.bpel-domain=<your created BPEL Domain name>
```


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Specify the following information:

- install.ps-host: This is the hostname and port (if specified) used to access the PeopleSoft Integration Broker.
- install.bpel-host: BPEL Process Manager hostname only (current machine name).
- install.bpel-port: BPEL Process Manager port only (default for JDeveloper is*9700*).
- install.bpel-domain: BPEL Domain created for deployment of PeopleSoft CRM processes.

Creating Deployable BPEL Files

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

To create deployable BPEL files:

1. Open the Oracle BPEL Process Manager Developer Prompt.

   This special prompt window has many environmental properties already configured.

   Refer to your BPEL Process Manager documentation on how to start the Developer Prompt for your environment.

2. For a Microsoft environment, select Start, Programs, <your installation name given at install time>, Oracle BPEL Process Manager 10.1.3.3.1, Developer Prompt.

   A command window appears.

3. In the Developer Prompt, change the directory to the <BPEL_PM_HOME>/bpel/peoplesoft directory.
4. Enter the following command:

   ```
   obant install
   ```

After completion a new directory, crm_<*date-time*>, is created. The directory name is listed in the output produced by the previous command.

Task 15-7-3: Deploying All BPEL Processes

In this final task, you deploy the BPEL processes onto the BPEL domain that you previously created.

To deploy the BPEL processes onto the BPEL domain:

1. Change the directory into the newly created crm_<*date-time*> directory.
2. Run the following command in the Developer Prompt window:

   ```
   obant
   ```

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

If errors occur during deployment, confirm that both the BPEL Process Manager and PeopleSoft systems are available. You can try to deploy a single process by entering the following code, where *processName* is the name if a directory found in the crm_<*date-time*> directory:

```
obant processName
```

If the problem persists, verify that both systems are available and also have no errors. You may need to restart the systems.

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CHAPTER 16

Installing PeopleSoft Unified Agent Desktop

This chapter discusses:

- Understanding PeopleSoft Unified Agent Desktop
- Prerequisites
- Configuring the Oracle Proxy-Enabled Server
- Validating PeopleSoft MultiChannel Framework REN
- Configuring a User as a PeopleSoft UAD Voice Agent
- Configuring a User as a PeopleSoft UAD MCF Agent
- Configuring Agent Presence Codes
- Overriding Presence Text of System-Defined Entries (Optional)
- Configuring Action Buttons for PeopleSoft UAD
- Defining Task Category Codes
- Configuring Status Codes
- Enabling PeopleSoft UAD Pagelet for the Home Page (Optional)
- Enabling PeopleSoft CRM UAD

Understanding PeopleSoft Unified Agent Desktop

This chapter provides instruction for enabling PeopleSoft Unified Agent Desktop (UAD) within Oracle CRM applications. The following installation related tasks must be performed to leverage the features provided in PeopleSoft UAD. These features are:

- Enabling users as computer telephony integration (CTI) agents to receive phone calls.
- Processing customer transactions that relate to the calls.
- Making outbound calls.

In addition, these features enables users to receive other media channel tasks such as agent-to-customer chats, agent-to-agent chats, emails and other generic business tasks.

Note. The PeopleSoft Universal Agent Desktop (UAD) requires MultiChannel Framework (MCF) and is not associated to any PeopleSoft CRM Product (for example, PeopleSoft Call Center).

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Note. Oracle recommends that you consult the PeopleSoft CRM 9.1 Product-to-PeopleBook Index found on My Oracle Support, to determine which PeopleSoft PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

Prerequisites

Before you begin the PeopleSoft UAD installation for PeopleSoft CRM, ensure that these requirements are met:

PeopleSoft MultiChannel Framework (MCF) is installed.

See *PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft MultiChannel Framework,* "Enabling MCF Features for CRM Applications."

Task 16-1: Configuring the Oracle Proxy-Enabled Server

If the Oracle proxy setting is enabled on the Application Server where the REN Server is configured, you must specify a fully qualified domain to properly establish the connection to the REN Server.

To configure the REN Server for the Oracle proxy-enabled application server:

1. Select PeopleTools, REN Server Configuration, REN Server Cluster.
2. In the REN Server Cluster URL field, enter the URL in the following syntax format:

```
http://<REN Server machine name>.<domain token name>:<port #>
```

3. Click Save.

Note. For the non-Oracle proxy enabled application server, the domain token name is not required.

Task 16-2: Validating PeopleSoft MultiChannel Framework REN

To receive and process tasks such as chats, emails and other generic business tasks, the user session must establish a valid connection to the PeopleSoft MultiChannel Framework (MCF) REN Server. Otherwise, the user is unable to send or receive PeopleSoft MCF tasks.

The connection validation consists of two tests:

- The Buffer Test.
- The Ping Test.

To validate connection to the PeopleSoft MCF REN Server:

1. Using the Administrator login ID and the password, login to the Oracle ECRM session.
2. Select PeopleTools, REN Server Configuration, REN Server Cluster.
3. Search for the current REN Server Cluster and open the definition.
4. Verify that the State flag is set to *Active.*

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5. Click the Buffer Test button.

   A new pop-up browser window with the page title Buffer Test for REN Server should have been launched with 50,000 bytes successfully processed; otherwise, there is a problem with the REN Server and the issue should be reported to the System Administrator.

6. With the 50,000 bytes correctly processed, the Buffer Test is passed and you can close the Buffer Test browser window.

7. Click the Ping Test button.

   A new pop-up browser window with the page title *Ping Test for REN Server* should launch successfully; otherwise, there is a problem with the REN Server and the issue should be reported to your System Administrator.

8. Click the Run Ping Test button from the new Ping Test window.

   Verify that 10 Events have been sent and received; otherwise, there is a problem with the REN Server and the issue should be reported to the System Administrator.

See Also

PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft MultiChannel Framework, "Configuring REN Servers. "

Task 16-3: Configuring a User as a PeopleSoft UAD Voice Agent

The same installation steps for configuring a CTI agent apply for configuring a user as a PeopleSoft UAD voice agent.

See *PeopleSoft PeopleTools 8.52 PeopleBook: PeopleSoft MultiChannel Framework,* "Configuring PeopleSoft CTI."

Note. Presence and Reason Code found under Tools configurations are not used by the PeopleSoft UAD functionality since PeopleSoft UAD manages its agent presence and reason codes.

With PeopleSoft UAD enabled, the user is given an extra level of tracing capability via the Application Dispatcher logging mechanism. The Application Dispatcher is a new browser window which remains open throughout the PeopleSoft UAD session to handle all events between the agent and the JSMCAPI (Java Server MultiChannel Application Programming Interface). With the new PeopleSoft UAD enabled, the current trace level option provides the following debugging capability, as listed in this table:

Trace level	Non-UAD CTI Agent	UAD CTI Agent
0 — None	None	None
I — Info	J	A, J
2 — Debug	J	A, J

A = Apps Dispatcher Trace Browser window

J = JSMCAPI Trace Browser window

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As soon as the PeopleSoft UAD agent logs into a PeopleSoft CRM session, either the Application Dispatcher, the JSMCAPI or both, trace browser windows automatically launch depending on the type of trace level option configured for the PeopleSoft UAD agent.

To configure the trace level option:

1. Select PeopleTools, MultiChannel Framework, CTI Configure, Agent.
2. Select the Trace Level from the drop-down list.

To configure Tools enabled CTI agent as a PeopleSoft UAD CTI agent:

1. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Agent Configuration.
2. Enter a valid User ID and click Add a New Value to create a new PeopleSoft UAD agent configuration definition.
3. Click the Add button.
4. In the CTI parameters section, enter the agent's default extension number. The system uses the default *Extension 1* to automatically establish the connection to the CTI server upon initial agent session login.
   - Extension 1: Enter Agent's default extension number.
   - Extension 2 (if so configured): Enter Agent's 2nd Extension number .

   Note. Number of lines and extensions are configured by the Tools setup. Currently there are only two CTI Configurations currently allowed by tools: 1 Line/2 Extensions or 2 Lines/1 Extension.

   - Number of Recently Dialed Numbers to Remember: The system stores and remembers the last Number of recently dialed numbers for future use as specified in this field. The default is 10 numbers.
5. Configure the following parameters specific to the agent, using the tables that follow:
   - Warning

Parameter	Description
Minute/Second	This is the time threshold when the system warns the PeopleSoft UAD agent by displaying specially rendered time values. There is no special event taking place; however, the system notifies the agent that the task processing is taking too long.
Style	PSTIMEWARNING (default) This can be customized by user to use different styles for the warning time.
Display Image	The image displays to the right of the time value. The default is the exclamation mark in a triangle.

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- Expired

Parameter	Description
Minute/Second	This is the time threshold when the system warns the PeopleSoft UAD agent that the time allowed to process the customer call has exceeded the time limit allowed by the call center limit.
Style	PSTIMEEXPIRED (default) This can be customized by the user to apply different styles for the warning time.
Display Image	This image displays to the right of the time value. The default is the red exclamation mark.

6. Click Save to save the PeopleSoft UAD agent configuration.

Task 16-4: Configuring a User as a PeopleSoft UAD MCF Agent

The same installation steps for configuring an MCF agent apply for configuring a user as an PeopleSoft UAD MCF agent.

See *PeopleTools PeopleBook: PeopleSoft MultiChannel Framework,* "Configuring MCF Agents"

With the new PeopleSoft UAD enabled, the current Trace Level option provides the following debugging capability, as listed in this table:

Trace Level	Non-UAD MCF Agent	UAD MCF Agent
0 — None	None	None
1— Information	J	A, J
2 — Debug	J	A, J

A = Application Dispatcher Trace Browser window

J = JSMCAPI Trace Browser window

As soon as the PeopleSoft UAD agent is logged into an Oracle ECRM session, either the Application Dispatcher or JSMCAPI or both, trace browser windows are launched depending on the type of Trace Level option configured for the PeopleSoft UAD MCF agent.

To configure the trace level option:

1. Select PeopleTools, MultiChannel Framework, Universal Queue, Administration, Agents.
2. Select the Trace Level from the drop-down list.

To configure Tools enabled MCF agent as a PeopleSoft UAD MCF agent:

1. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Agent Configuration.
2. Enter a valid User ID and click Add a New Value to create a new PeopleSoft UAD agent configuration definition.

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If the Agent definition already exits, search and open the existing definition. Otherwise, click the Add button to add a new agent definition.

3. In the Default Agent Queue section, enter the agent's default queue to which the agent automatically logs in upon initial session login.
4. The same Warning and Expired settings are used for voice calls and other MCF tasks.

   Refer to the task *Configuring a User as a PeopleSoft UAD Voice Agent* for instructions on how to configure these parameters.
5. Click Save to save the PeopleSoft UAD agent configuration.

Task 16-5: Configuring Agent Presence Codes

Presence Codes are the value of text strings that are predefined and used internally by the JSMCAPI framework to determine the state of PeopleSoft UAD agents. JSMCAPI, based on the current state of the agent, manages and decides how to best route the MultiChannel tasks to the most appropriate agent to handle the incoming tasks. The Presence Text displays on the PeopleSoft UAD console with respect to the corresponding Agent state.

In a typical installation, there is no need to configure presence codes for Agent because the system defined entries are sufficient for the PeopleSoft UAD operations.

To configure Agent Presence codes:

1. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Agent Configuration.
2. Select the PeopleSoft UAD Presence Codes tab.

   This table lists the delivered, system-defined default entries:

Channel	Presence State	Presence Text	Reason code
Voice	Not Ready	Not Ready	Unavailable
Voice	Ready	Ready	(not applicable)
Voice	Work Not Ready	Work Not Ready	(not applicable)
Voice	Work Ready	Work Ready	(not applicable)
Multichannel Queue	Available	Available	(not applicable)
Multichannel Queue	Unavailable	Unavailable	(not applicable)
Multichannel Queue	Assumed Unavailable	Assumed Unavailable	(not applicable)

3. To add a system default presence code entry, click the Add System Default button and perform the following tasks:
   - Select a Channel; either Voice or Multichannel Queue.
   - Select a Presence State from the drop-down list.
   - Enter a Presence Text.

   Note. The Reason Code is used only for the Unavailable or Not Ready Presence State in Multichannel Queue or Voice channel respectively.

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Task 16-6: Overriding Presence Text of System-Defined Entries (Optional)

This task is optional. The PeopleSoft UAD always uses the presence text of the system-defined entries, unless they are redefined as Agent Default.

To override the system-defined entries:

1. Click the Add Agent Default button.
2. Specify the following values:
   - Select a Channel; either Voice or Multichannel Queue.
   - Select a Presence State from the drop-down list.
   - Enter a Presence Text.
   - Enter a Reason code if the Presence State selected is either Not Ready for the Voice channel or Unavailable for the Multichannel Queue channel.
3. Click Save to save the PeopleSoft UAD Agent Configuration.

Task 16-7: Configuring Action Buttons for PeopleSoft UAD

All of the PeopleSoft UAD management tasks are performed and managed by clicking a button or a text short-cut key. The configuration of the PeopleSoft UAD console is highly customizable. The look-and-feel of the console can be easily modified to meet the requirement of a user site.

In a typical installation, there is no need to configure action buttons because the system-defined entries are sufficient for the PeopleSoft UAD operations.

To configure action buttons for the PeopleSoft UAD console:

1. Login to the PeopleSoft CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select a Display Option. The default is *Image.*

Note. Action buttons on the PeopleSoft UAD console can be rendered as an image or as text. The *Text* option renders all action buttons with the text label; the *Image* option renders the corresponding image icons for each button.

---

4. Click the Add Button to add an Action button definition.
   - Button Name—Name of the action button.
   - Call Action—Action that clicking the button executes.
   - Disabled—If selected, the button is not used.
   - Label—Text label of the button used when the text display option is selected.
   - Enabled Button Image—Name of the button image.

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5. Click Save to save the button definition.

Note. To support a comprehensive set of existing CTI functionalities, the following button entries are required and delivered as default system data. Removing any of the system default button entries will break the CTI functionalities and is *not* recommended.

This table lists system-defined default action buttons:

Button Name	Call Action	Disabled	Label	Enabled Button Image
COMPLETE	Complete	No	CP	PS_UAD_CALL_ COMPLETE_ICN
CONFERENCE	Conference	No	CF	PS_UAD_ CONFERENCE_ICN
CONSULT	Consult	No	CS	PS_UAD_ CONSULT_ICN
CONSULT TRANSFE	Consultive Transfer	No	CT	PS_UAD_ CONSULT_ TRANSFER_ICN
CTI AVAILABLE	Make CTI Available	No	A	PS_UAD_VOICE_ AVAILABLE_ICN
DIAL OUT	Dial Out	No	D	PS_UAD_MAKE_ CALL_ICN
HOLD	Hold	No	H	PS_UAD_HOLD_ ICN
RECONNECT	Reconnect	No	RC	EOPP_LINK_ NODE_ICN
RELEASE	Release	No	X	PS_UAD_ RELEASE_ICN
RETRIEVE	Retrieve Hold	No	RH	PS_UAD_ RETRIEVE_ICN
TRANSFER	Transfer	No	T	PS_UAD_ TRANSFER_ICN

Task 16-8: Defining Task Category Codes

Task category codes are codes that are selected by the task processing PeopleSoft UAD agent to categorize MCF tasks at the time of their completion. The following task scenarios trigger the task categorization that the PeopleSoft UAD agent requires:

- Terminating a customer voice call (Releasing or Transferring to another internal PeopleSoft UAD CTI agent).
- Terminating a customer chat.
- Closing an email.

The list of Task categories is presented on the PeopleSoft UAD console as drop-down entries.

To define Category Codes:

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1. Login to a PeopleSoft CRM session as *Administrator.*
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Click the Category Codes page tab.
4. Click the Add Category Code button to add a new category code entry as follows:
   - Order — Displays the order of the category code. The lower number entry appears first vertically in the drop-down field.
   - Code — The category code that is used internally by the PeopleSoft UAD framework.
   - Description — Provides a description of the category. The description is displayed in the category drop-down field.
5. Click Save to save the category code definition.

Task 16-9: Configuring Status Codes

Status codes are definition entries used in the PeopleSoft UAD status popup windows to help the PeopleSoft UAD agent change his/her state. In conjunction with action buttons defined for the PeopleSoft UAD console, they together dictate the behavior of how agents receive MCF and CTI tasks accordingly. In a typical installation, there is no need to configure status codes because the system defined entries are sufficient for the PeopleSoft UAD operations.

To add new CTI Status Codes:

1. Login to a PeopleSoft CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select the Status Codes tab.
4. Click the Add CTI Status Code button to add a new status code for the CTI channel.
   - Order — Displays the order of the Status code in the Status pop-up window. The lower number entry appears first vertically in the status window.
   - Status Label — The text string value of the status that appears in the status window.
   - Event — The corresponding event action that is being executed upon selecting the status.
   - Image Name — The name of the Image icon that is being rendered.
   - Image — A preview of the Image icon selected.
   - Reason Code — The reason code for the Unavailable event status.
5. 5.Click Save to save the new CTI Status code.

To add a new Multichannel Queue Status Code:

1. Login to a PeopleSoft CRM session as Administrator.
2. Select Set Up CRM, Product Related, MultiChannel Definitions, Unified Agent Desktop, Console Definition.
3. Select the Status Codes tab.

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4. Click the Add Multichannel Queue Code button to add a new status code for the MCF channel.

   Multichannel Queue Status code definitions are as follows:

   - Order—the display order of the Status code in the Status pop-up window.

     The lower number entry appears first vertically in the status window.
   - Status Label—the text string value of the status that appears in the status window.
   - Event—the corresponding event action being executed upon selecting the status.
   - Image Name—the name of the image icon being rendered.
   - Image—the preview of the image icon selected.
5. Click Save to save the new Multichannel Queue Status code.

This table lists the default CTI Status codes that are delivered as system data:

Order	Status Label	Event	Image Name	Reason Code
1	Available	Available	PS_UAD_VOICE_ AVAILABLE_ICN	(not applicable)
2	Unavailable	Unavailable	PS_UAD_VOICE_ UNAVAILABLE_ ICN	Unavailable
3	Do Not Disturb	Do Not Disturb	PS_UAD_VOICE_ BUSY_ICN	Do Not Disturb
4	Busy	Busy	PS_UAD_VOICE_ BUSY_ICN	Busy
5	At Lunch	At Lunch	PS_UAD_VOICE_ UNAVAILABLE_ ICN	At Lunch
6	On Break	On Break	PS_UAD_VOICE_ UNAVAILABLE_ ICN	On Break
7	Away	Away	PS_UAD_VOICE_ UNAVAILABLE_ ICN	Away
8	In Wrap-Up Mode	In Wrap-Up Mode	PS_UAD_VOICE_ UNAVAILABLE_ ICN	In Wrap-Up Mode

This table lists the default MultiChannel Queue Status codes that are delivered as system data:

Order	Status Label	Event	Image Name
1	Available	Available	PS_UAD_MC_ AVAILABLE_ICN
2	Unavailable	Unavailable	PS_UAD_MC_ UNAVAILABLE_ICN
3	Busy	Busy	PS_UAD_MC_BUSY_ICN
4	At Lunch	At Lunch	PS_UAD_MC_ UNAVAILABLE_ICN

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Order	Status Label	Event	Image Name
5	On Break	On Break	PS_UAD_MC_ UNAVAILABLE_ICN
6	Away	Away	PS_UAD_MC_ UNAVAILABLE_ICN

Task 16-10: Enabling PeopleSoft UAD Pagelet for the Home Page (Optional)

This task is optional. The content on the user's home page for the Oracle CRM applications is rendered via pagelets. To allow users to render PeopleSoft UAD console in a pagelet, the agent must enable the MultiChannel Toolbar option from the Content Personalization menu.

To enable the PeopleSoft UAD Console for the Home page:

1. Login as a PeopleSoft UAD agent.
2. Click the Content personalize link.
3. In the CRM pagelet section, select the MultiChannel Toolbar check box.
4. Click the Personalize Layout link to Arrange pagelets.
5. In the right column, click the MultiChannel Toolbar entry once to highlight it.
6. Click the up arrow button near the Delete Pagelet button to move the MultiChannel Toolbar entry to the top of the right column.

   Note. This step is recommended only when the PeopleSoft UAD agent has other main menu pagelets that are too large to view the PeopleSoft UAD console without scrolling vertically to the end of the page.

7. Click Save.

Task 16-11: Enabling PeopleSoft CRM UAD

This section discusses:

- Updating Branding
- Editing the PeopleSoft MultiChannel Toolbar
- Editing the PeopleSoft PeopleTools 8.52 Default Template
- Editing the PeopleSoft PeopleTools 8.52 Frames Template
- Editing the Hover Navigation iFrame Template

Task 16-11-1: Updating Branding

To update branding:

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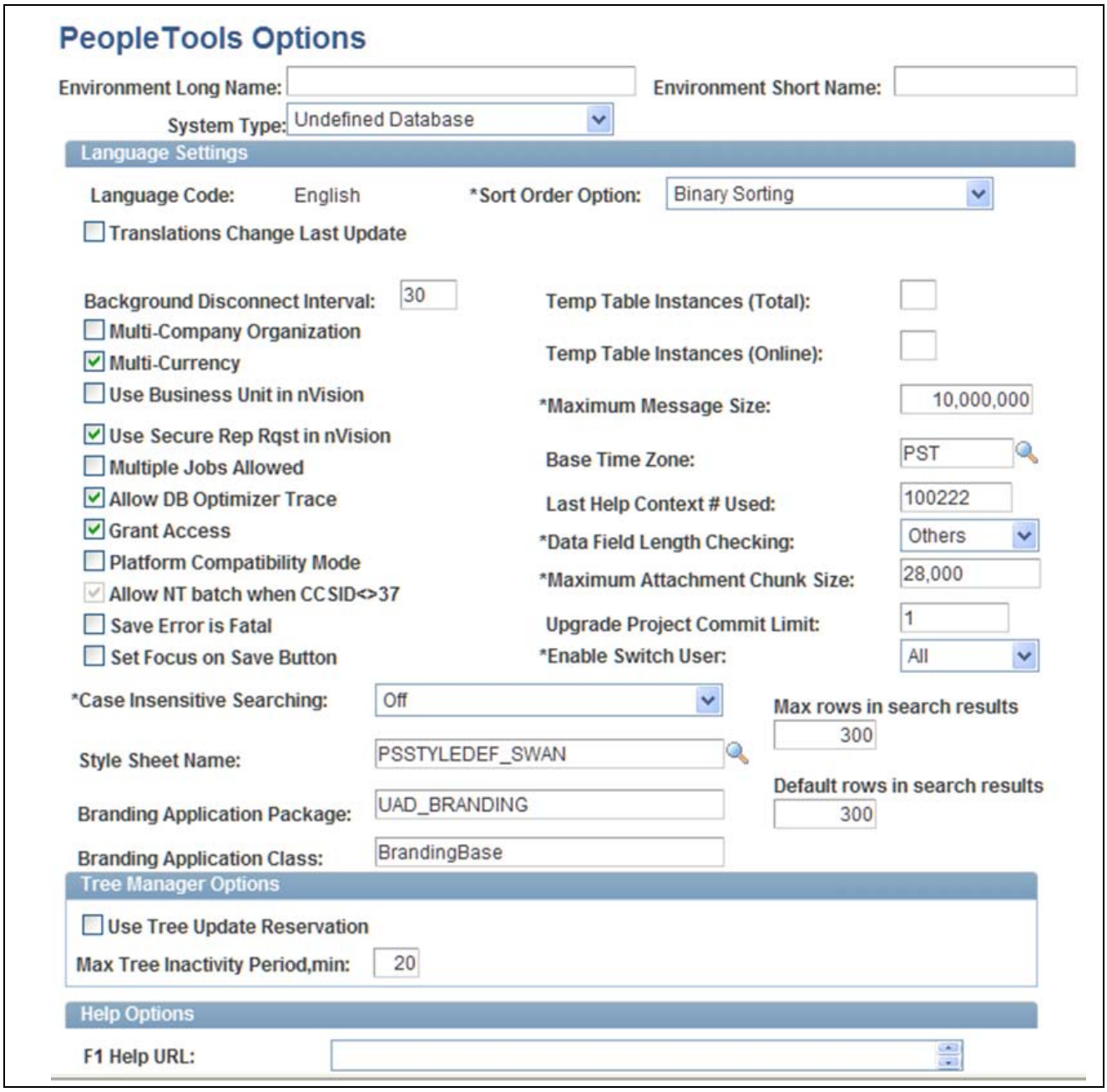
1. Select PeopleTools, Utilities, Administration, PeopleTools Options to access the PeopleTools Options page, as shown in the following example:



PeopleSoft PeopleTools Options page

2. In the Branding Application Package field, enter *UAD_BRANDING*.
3. Accept the default values for the remaining fields.

Task 16-11-2: Editing the PeopleSoft MultiChannel Toolbar

To edit the PeopleSoft MultiChannel toolbar:

1. Select PeopleTools, Portal, Structure and Content.

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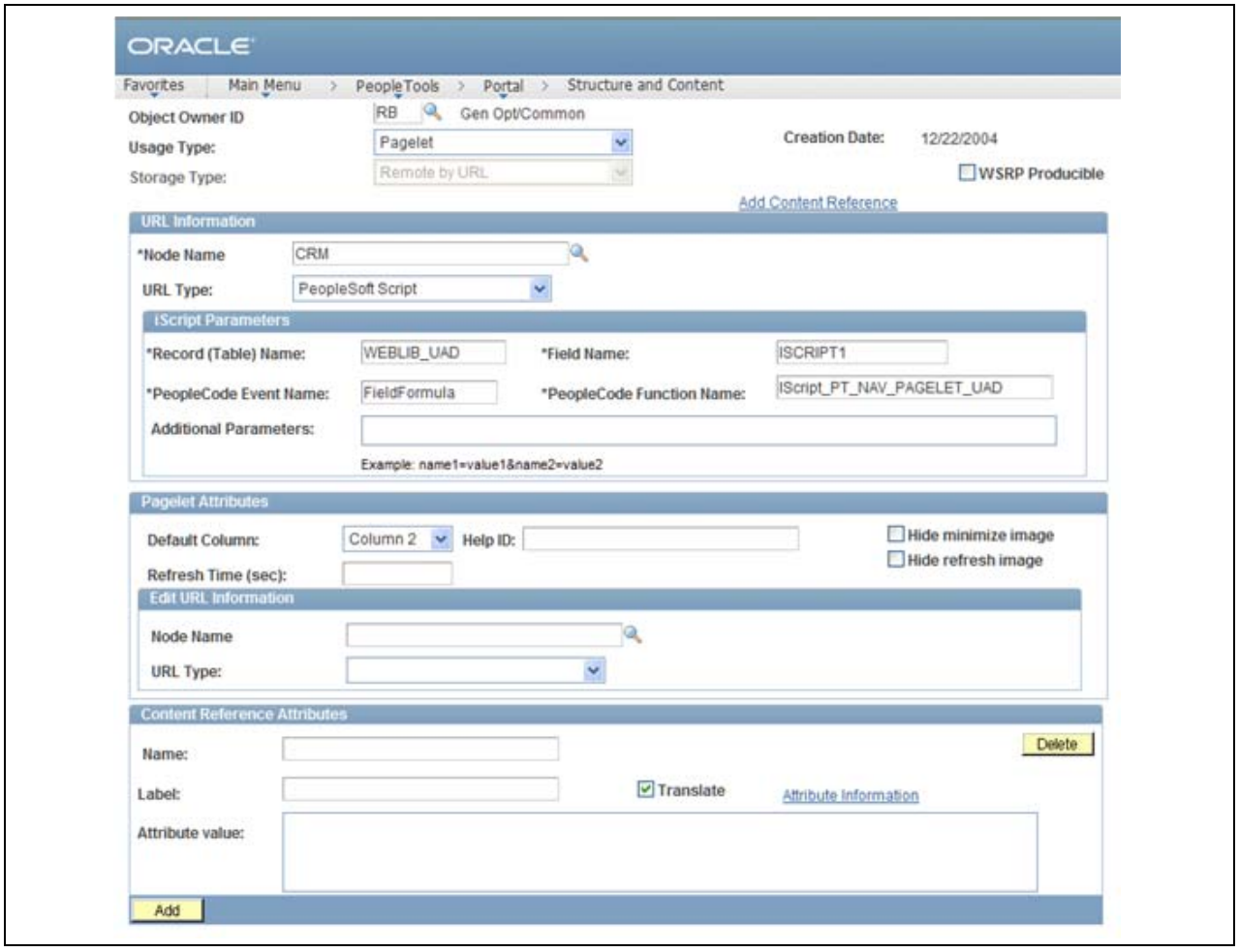
2. Click the Portal Options link.
3. Click the Pagelet link.
4. In the Node Name field, select CRM from the drop-down list..
5. Edit the MultiChannel Toolbar as follows:
   a. In the Record (Table) Name field, enter *WEBLIB_UAD.*
   b. In the PeopleSoft Function Name field, enter *IScript_PT_NAV_PAGELET_UAD.*
   c. Accept the default values for the remaining fields on the Structure and Content page, as shown in the following example:



Structure and Content page

Task 16-11-3: Editing the PeopleSoft PeopleTools 8.52 Default Template

To edit the PeopleSoft PeopleTools 8.52 default template:

1. Select PeopleTools, Portal, Structure and Content.

   The Content Ref Administration page appears, as shown in the following example:

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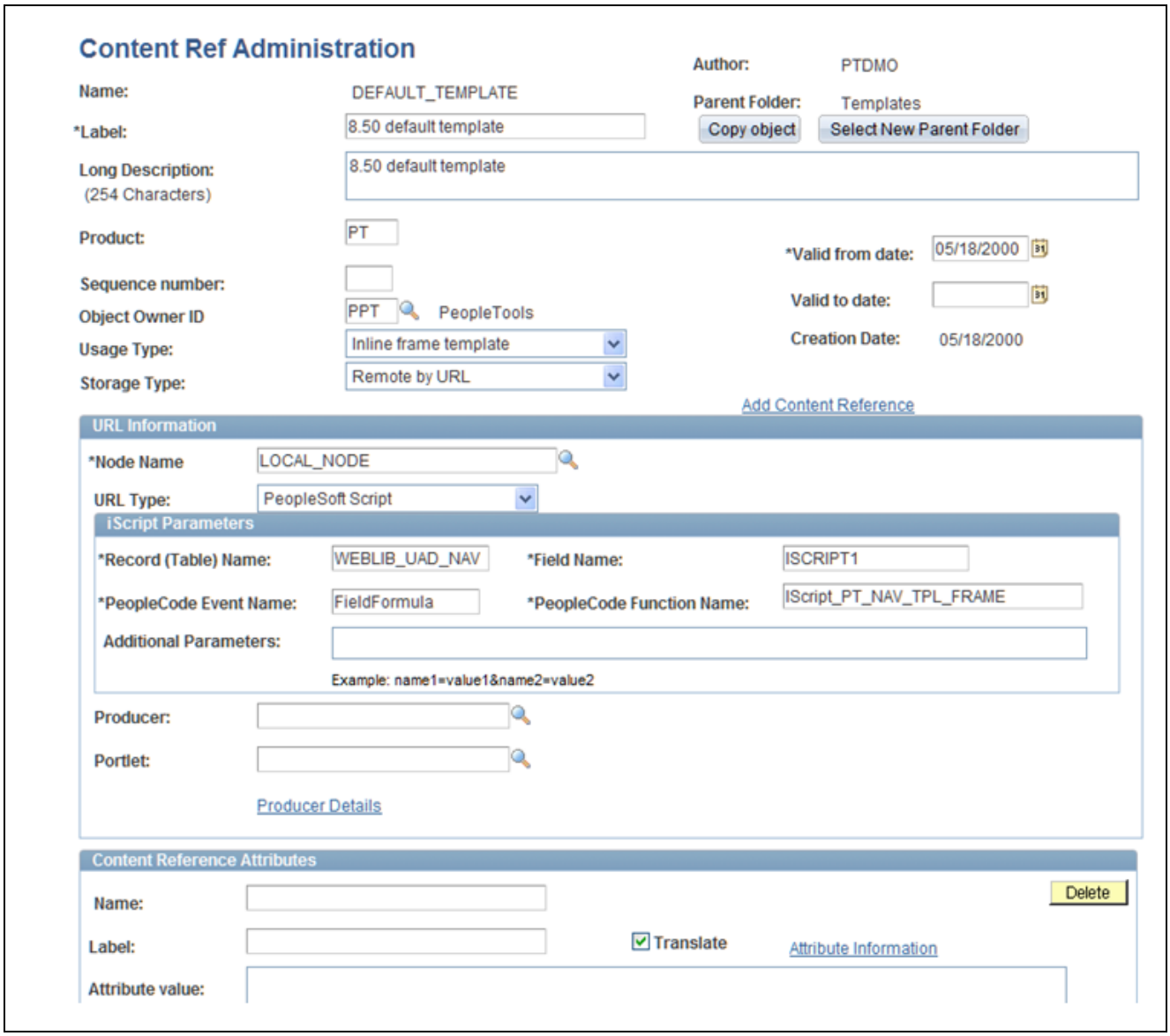

Content Ref Administration page

2. Click the Portal Objects link.

   The Portal Objects page appears.

3. Click the Template link.
4. Click the Edit of 8.52 Default Template.

   The DEFAULT_TEMPLATE page appears.

   a. In the Record (Table) Name field, enter *WEBLIB_UAD_NAV.*

   b. Accept the default values for the remaining fields.

Task 16-11-4: Editing the PeopleSoft PeopleTools 8.52 Frames Template

To edit the PeopleSoft PeopleTools 8.52 frames template:

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1. Select PeopleTools, Portal, Structure and Content.
2. Click the Portal Objects link.

   The Portal Options page appears.
3. Click the Template link.
4. Click the Edit of 8.52 frames template.

   The PT_85X_FRAMES_TEMPLATE page appears.
   a. In the Record (Table) Name field, enter *WEBLIB_UAD_NAV (from WEBLIB_PT_NAV).*
   b. Accept the default values for the remaining fields.

Task 16-11-5: Editing the Hover Navigation iFrame Template

To edit the hover navigation iFrame template:

1. Select PeopleTools, Portal, Structure and Content.
2. Click the Portal Objects link.

   The Portal Options page appears.
3. Click the Template link.
4. Click the Edit of Hover nav iframe template.

   The PT_HOVERNAV_TEMPLATE page appears.
   a. In the Record (Table) Name field, enter *WEBLIB_UAD_NAV.*
   b. Accept the default values for the remaining fields.

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CHAPTER 17

Integrating PeopleSoft CRM and PeopleSoft HCM Using Query Access Service

This chapter discusses:

- Understanding PeopleSoft CRM and PeopleSoft HCM Integration Using Query Access Service
- Setting Up PeopleSoft CRM
- Setting Up PeopleSoft HCM
- Planning for Unit Test

Understanding PeopleSoft CRM and PeopleSoft HCM Integration Using Query Access Service

This section discusses:

- Defining Settings
- Defining the PeopleSoft PeopleTools Release

PeopleSoft CRM and PeopleSoft HCM integration, using the Query Access Service (QAS) framework that is provided by PeopleSoft PeopleTools and utilizes the PeopleSoft Integration Broker, allows remote systems to access data in PeopleSoft applications through PSQuery. This integration allows queries that are defined in PeopleSoft HCM to be used to populate audiences in PeopleSoft CRM Marketing.

The tasks and steps in this chapter are required to set up PeopleSoft CRM and PeopleSoft HCM for integration using QAS and to prepare QAS and PeopleSoft Integration Broker for this unique implementation.

Defining Settings

Before proceeding with the set up steps, obtain and verify the following:

- Name of the Default Local Node on PeopleSoft CRM (the default is *PSFT_CR*).
- Name of the Default Local Node on PeopleSoft HCM (the default is *PSFT_HR*).
- Authentication Option (*None*), Node Password (*N/A*), and Default User ID for each (HCM=*PS*, CRM=*VP1*).
- Application Server URL, User ID and Password (*VP1/VP1*), and Tools release for PeopleSoft CRM.
- Application Server URL, User ID and Password (*PS/PS*), and Tools release for PeopleSoft HCM.
- Gateway Properties User ID and Password for PeopleSoft CRM (the default is *administrator/password*).

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- Service Configuration Target Location.

Defining the PeopleSoft PeopleTools Release

To use PeopleSoft CRM and PeopleSoft HCM Integration using QAS, you must be using PeopleSoft PeopleTools 8.52 or higher.

See *PeopleSoft Customer Relationship Management 9.1 Hardware and Software Requirements guide.*

See *PeopleSoft PeopleTools 8.52 Installation guide, for your database platform.*

Task 17-1: Setting Up PeopleSoft CRM

This section discusses:

- Understanding Setting Up PeopleSoft CRM
- Setting Up Security for PeopleSoft CRM
- Setting up Nodes for PeopleSoft CRM
- Setting Up the Gateway for PeopleSoft CRM
- Setting Up Single Signon for PeopleSoft CRM
- Verifying or Modifying Service Configurations for PeopleSoft CRM
- Modifying Service Operations for PeopleSoft CRM
- Purging the Domain Status for PeopleSoft CRM

Understanding Setting Up PeopleSoft CRM

All of the steps in this section pertain to the PeopleSoft CRM application and must be performed while logged in to the PeopleSoft CRM application.

Task 17-1-1: Setting Up Security for PeopleSoft CRM

The user VP1 must have the QAS Administrator role.

To assign the QAS Administrator role:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. In the User ID field, enter *VP1* and click the Search button.
3. On the User Profiles page, select the Roles tab to access the Roles page, as shown in the following example:

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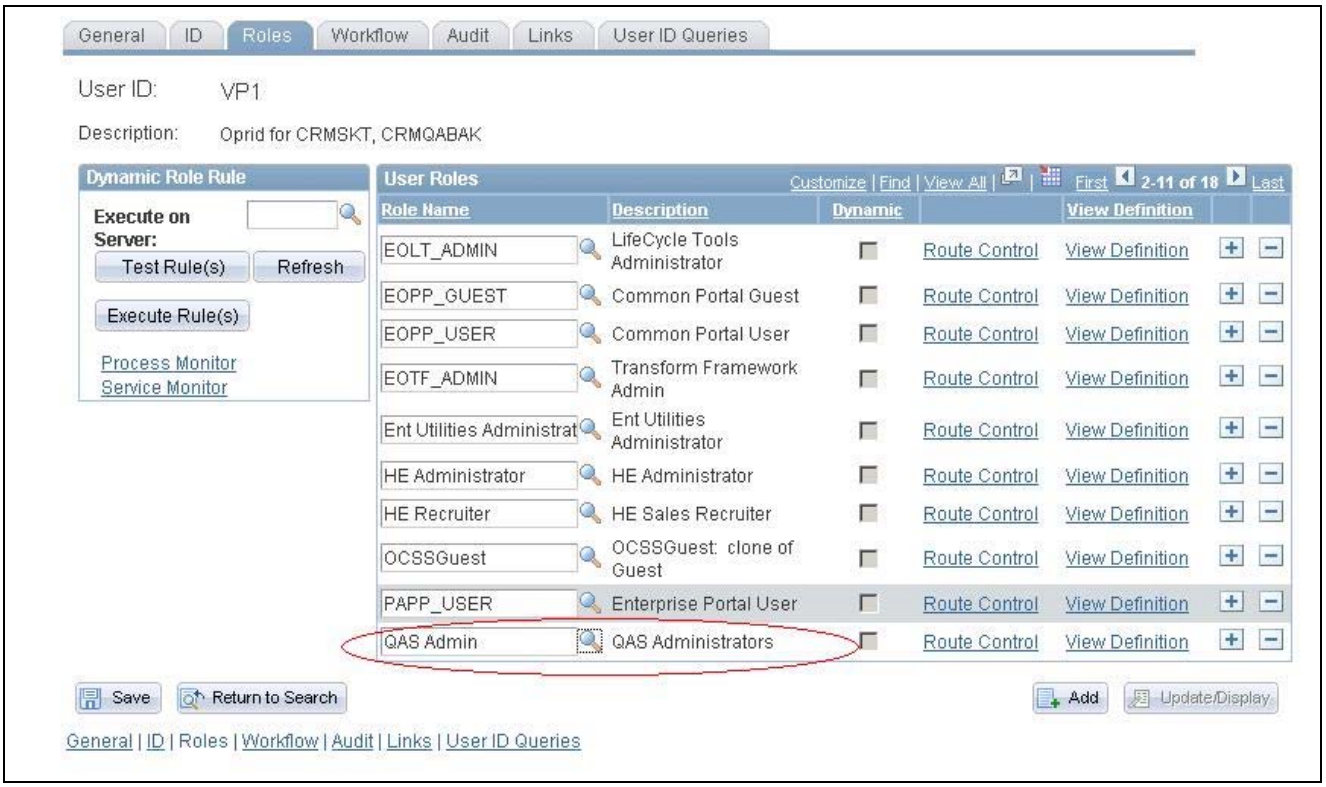

Roles page - User ID VP1 with user role QAS Admin

4. On the Roles page in the User Roles grid, if QAS Admin does not exist, click the Add button and add user role *QAS Admin*.
5. Click Save.

Task 17-1-2: Setting up Nodes for PeopleSoft CRM

The PeopleSoft HCM default local node must exist in PeopleSoft CRM as an active node.

To set up the PeopleSoft HCM default local node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. In the Node Name field, enter the node name (the default is *PSFT_HR*), and click the Search button.
3. If this node does not exist, you must create it.
4. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example.

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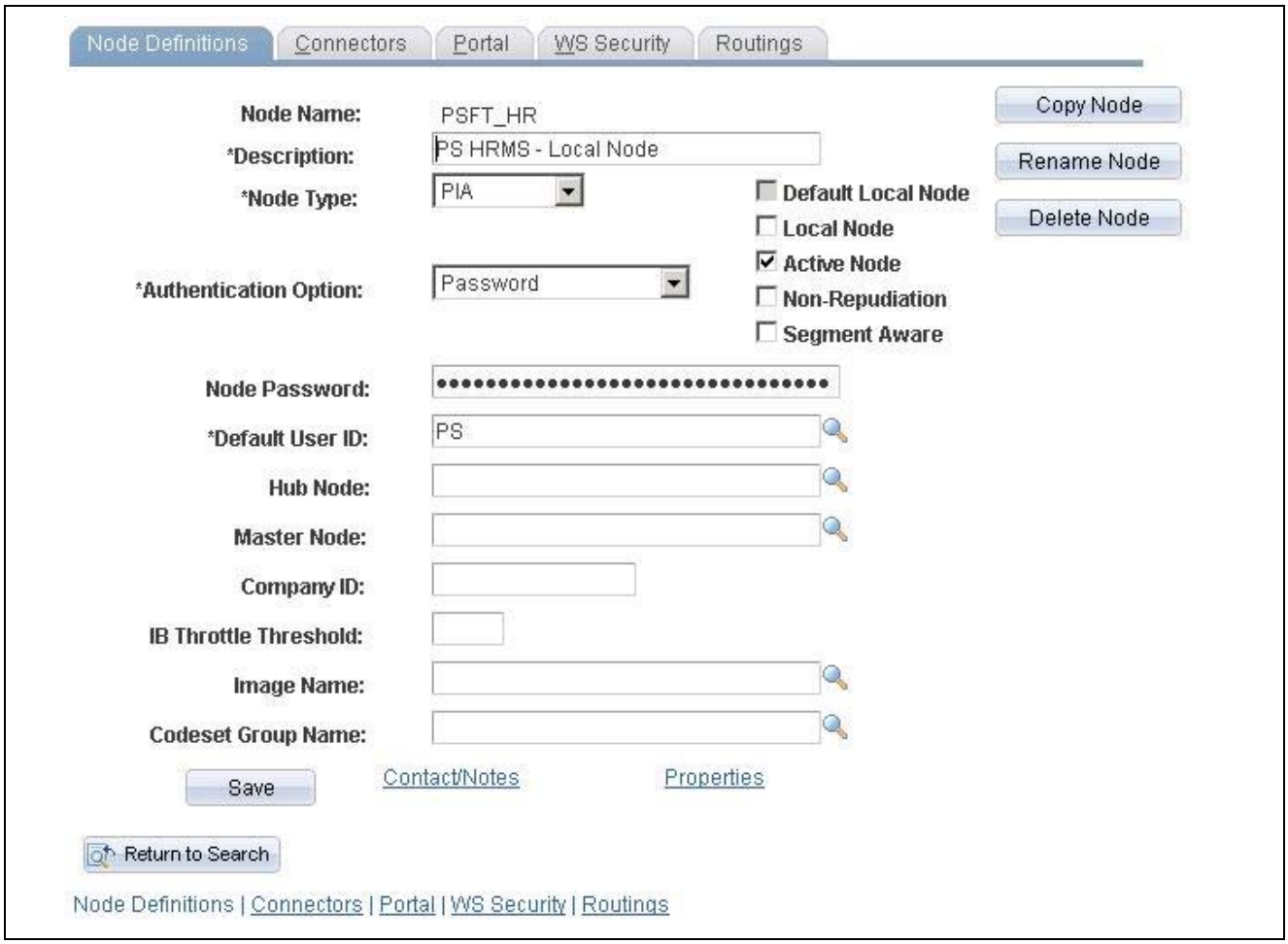
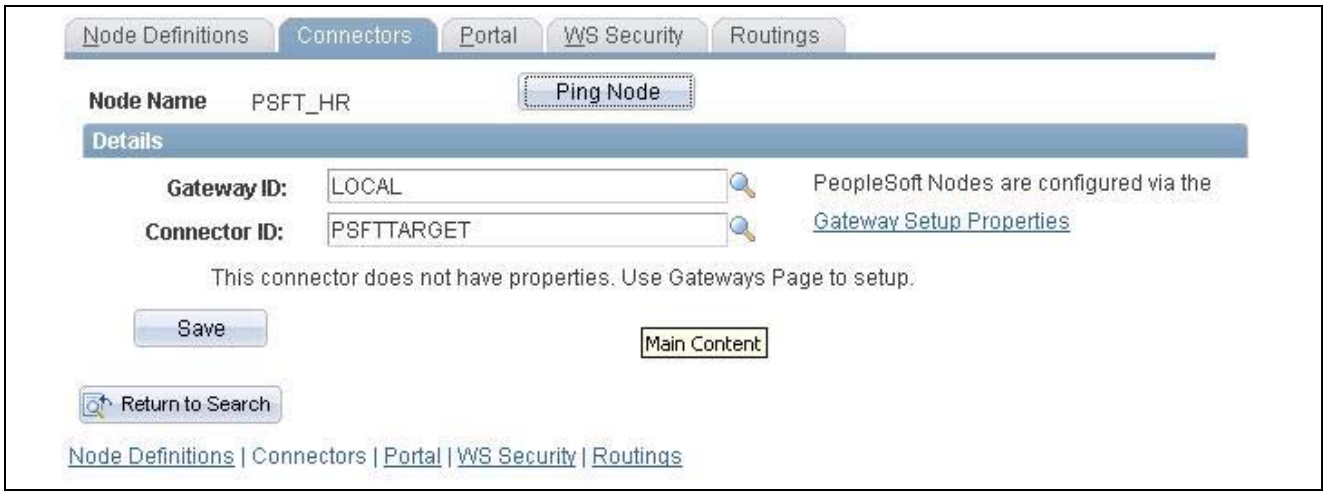


Node Definitions page - PSFT_HR node with node type PIA

5. On the Node Definitions page, verify that *PIA* is selected in the Node Type field or select it now.
6. The Authentication Option, Node Password, and Default User ID should match what is defined on the PeopleSoft HCM system for this node.
7. Select the Connectors tab to access the Connectors page, as shown in the following example:



Connectors page - PSFT_HR node with connector ID PSFTTARGET

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8. On the Connectors page, verify that *PSFTTARGET* is selected in the Connector ID field, or select it now.
9. Click Save.

Task 17-1-3: Setting Up the Gateway for PeopleSoft CRM

In this task you use the PeopleSoft Integration Broker Configuration page to add the PeopleSoft HCM local node to the PeopleSoft CRM side of the PeopleSoft Integration Broker Gateway Configuration page.

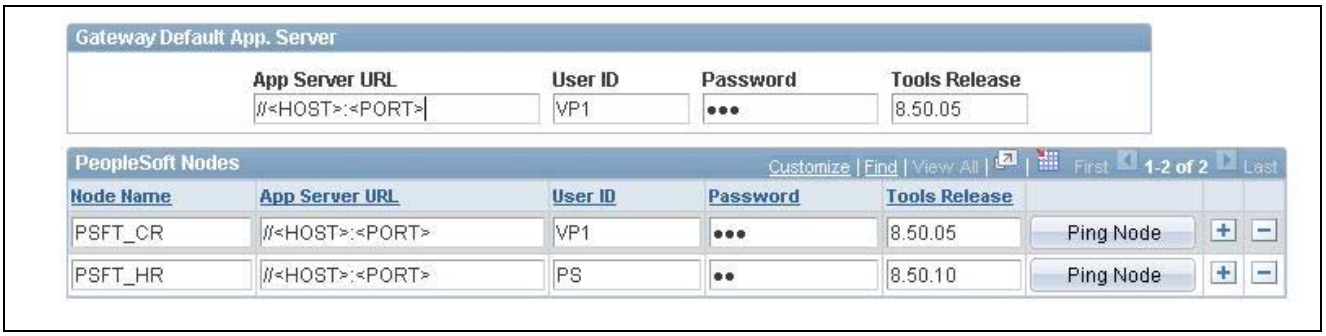
To add the PeopleSoft HCM local node to the PeopleSoft CRM side:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click the Search button. This should take you directly into the local gateway, unless other gateways are defined.

   If this is the case, select the local gateway to proceed.
3. Click the Gateway Setup Properties link.

   The Gateway Properties login page appears.
4. Enter the User ID and Password (defaults are *administrator* and *password*) to sign in to the Gateway Properties - Gateway Default App. Server page.

   The Gateway Properties - Gateway Default App. Server page appears, as shown in the following example:



Gateway Default App. Server - PeopleSoft Nodes

5. On the Gateway Default App. Server page, if the PeopleSoft HCM node does not exist, click the Add button to add the HCM Node Name, App Server URL, User ID, Password and Tools Release.
6. Click Save.

Task 17-1-4: Setting Up Single Signon for PeopleSoft CRM

In this task you add the PeopleSoft CRM default local node and the PeopleSoft HCM Default local node to the PeopleTools Single Signon page.

To add the PeopleSoft CRM and PeopleSoft HCM Default local nodes to the PeopleTools Single Signon page:

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

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

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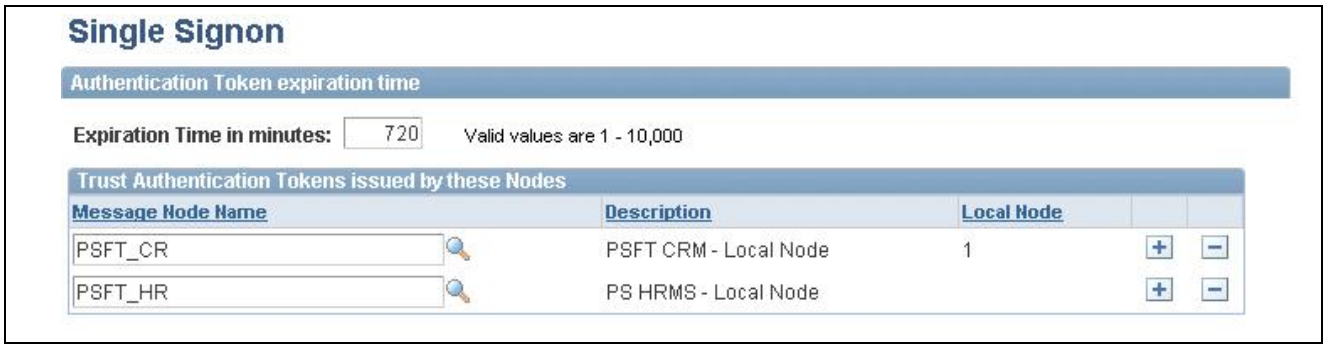


Single Signon - Trust authentication tokens and nodes

2. On the Single Signon page, if the PeopleSoft CRM and PeopleSoft HCM default local nodes do not exist, click the Add button to add the PeopleSoft CRM default local node and then the PeopleSoft HCM default local node in the Message Node Name fields.
3. Click Save.

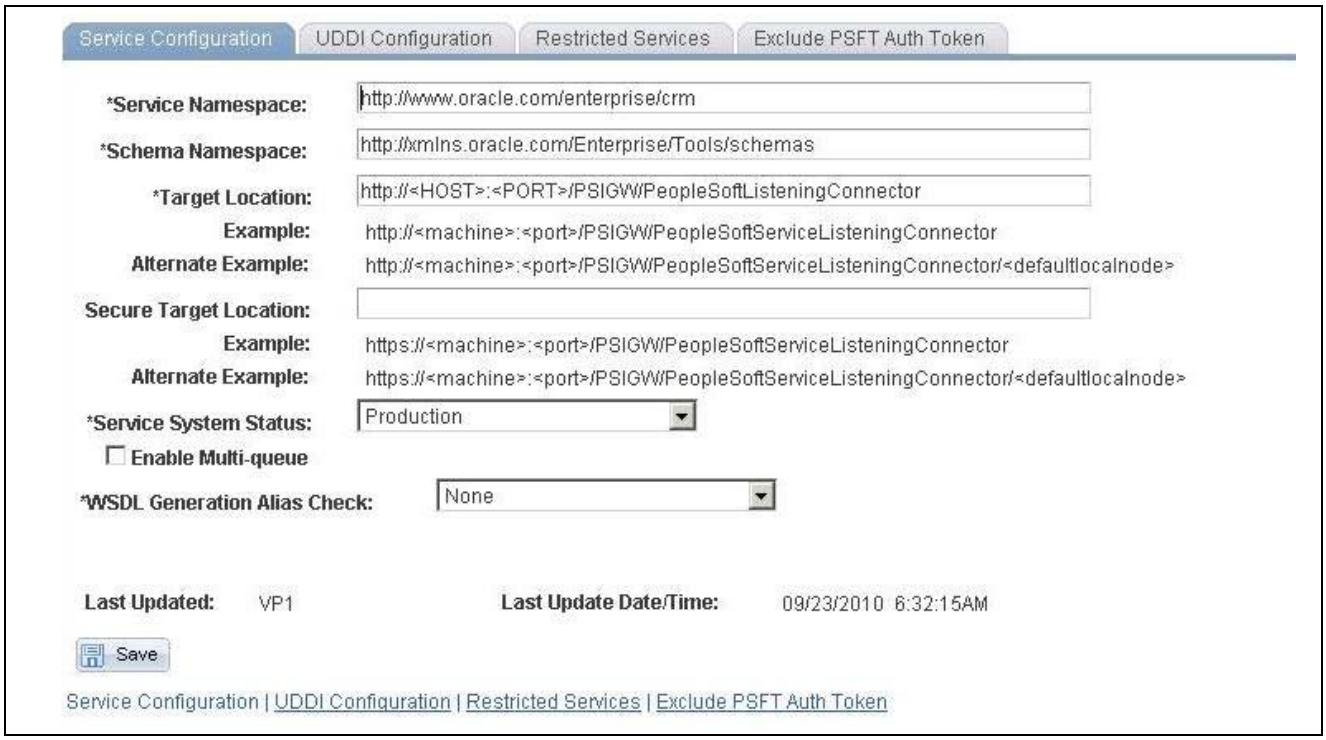
Task 17-1-5: Verifying or Modifying Service Configurations for PeopleSoft CRM

QAS is delivered as a restricted service.

To verify or modify this service configuration:

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

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



Service Configuration page

2. On the Service Configuration page, verify the path in the Target Location field or modify it now.

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3. Select the Restricted Services tab to access the Restricted Services page, as shown in the following example:

Restricted Services page

4. On the Restricted Services page, in the Services search field, enter *QAS* and click Search.
5. Verify that the QAS_QRY_SERVICE check box is *not* selected, or deselect it now.
6. Click Save.

Task 17-1-6: Modifying Service Operations for PeopleSoft CRM

The following three Service Operations must be modified to set the Security Verification, Service Operation Security, and Routings. You must do this for *each* of the Service Operations in the following table:

Reference Number	Service Operations
1	QAS_EXECUTEQRYSYNC_OPER
2	QAS_LISTQUERY_OPER
3	QAS_LISTQUERYPROMPTS_OPER

To modify the three required service operations:

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

   The Service Operations - General page appears.
2. On the Service Operations - General page, in the Service field, enter *QAS_QRY_SERVICE*.
3. In the Service Operations field, enter the value from one of the Service Operations in the preceding table.

   For example: QAS_EXECUTEQRYSYNC_OPER

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

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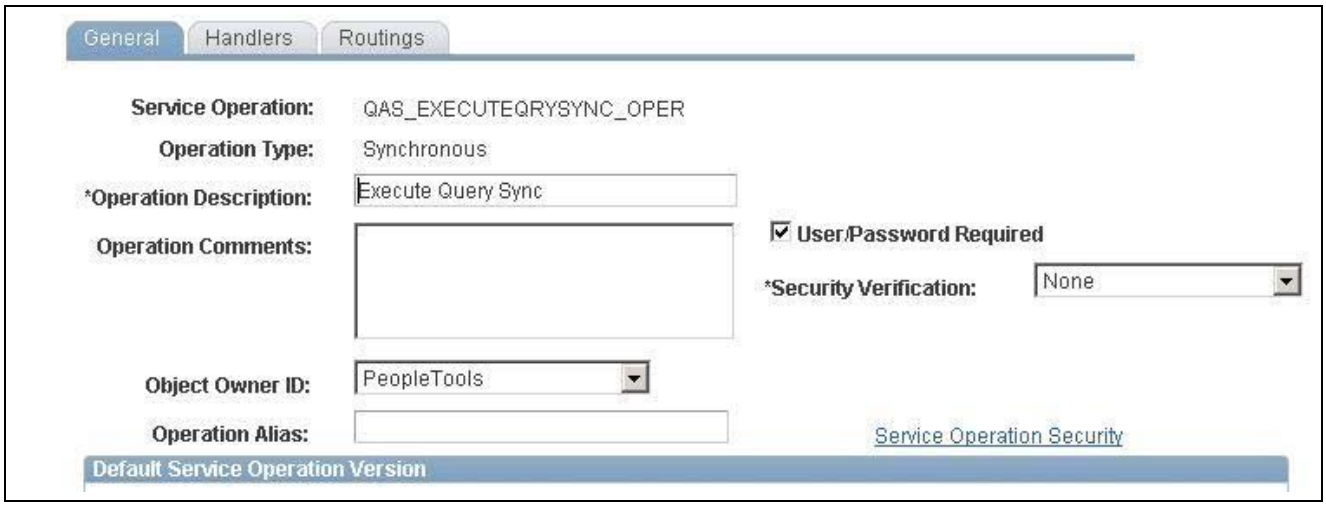
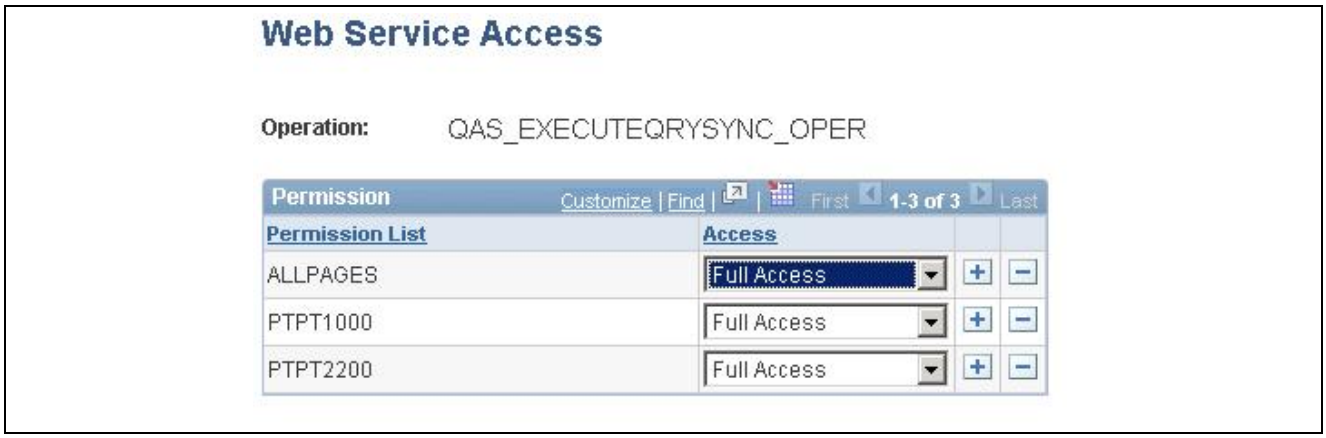


Service Operations - General page

4. In the Security Verification field, select *None* from the drop-down list.
5. Click Save.
6. Click the Service Operation Security link to access the Web Service Access - QAS_EXECUTEQRYSYNC_OPER page, as shown in the following example:



Web Service Access - QAS_EXECUTEQRYSYNC_OPER page

7. Click the Add button to add the permission lists in the following table:

Permission Lists	Access
ALLPAGES	Full Access
PTPT1000	Full Access
PTPT2200	Full Access

8. Click Save.
9. Return to the Security Operations page (select PeopleTools, Integration Broker, Integration Setup, Service Operations) and select the Routings tab to access the Routings page.
10. On the Routings page, enter any missing routings from the following table. This table contains the necessary Routings and their corresponding Sender Node and Receiver Node names:

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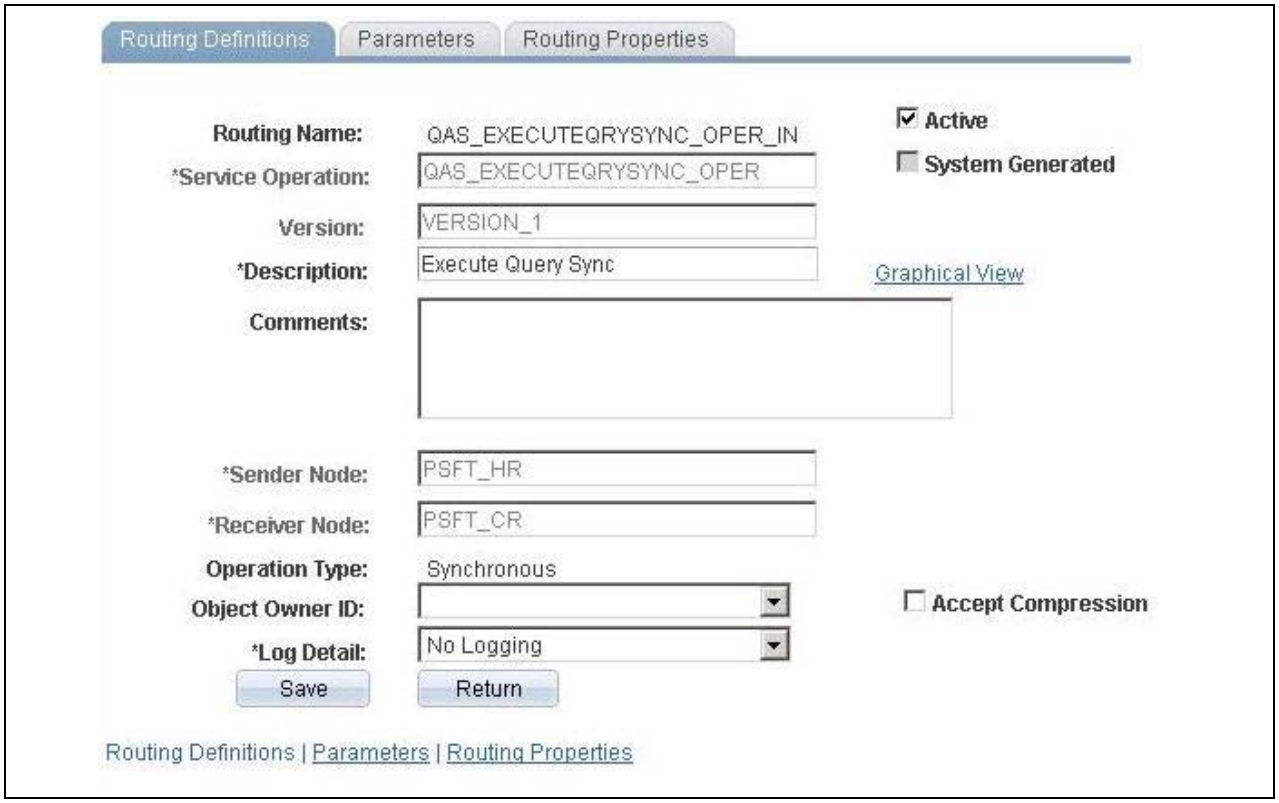
Reference Number	Service Operations	Routing Name	Sender Node	Receiver Node
1	QAS_EXECUTEQRYSYNC_OPER	QAS_EXECUTEQRYSYNC_ OPER_IN	PSFT_HR	PSFT_CR
1	QAS_EXECUTEQRYSYNC_OPER	QAS_EXECUTEQRYSYNC_ OPER_OUT	PSFT_CR	PSFT_HR
2	QAS_LISTQUERY_OPER	QAS_LISTQUERY_OPER_IN	PSFT_HR	PSFT_CR
2	QAS_LISTQUERY_OPER	QAS_LISTQUERY_OPER_OUT	PSFT_CR	PSFT_HR
3	QAS_LISTQUERYPROMPTS_ OPER	QAS_LISTQUERYPROMPTS_ OPER_IN	PSFT_HR	PSFT_CR
3	QAS_LISTQUERYPROMPTS_ OPER	QAS_LISTQUERYPROMPTS_ OPER_OUT	PSFT_CR	PSFT_HR

Important! The Routing Name is not significant except that it must be unique. The Sender Node and Receiver Node are important and determine whether the routing is inbound or outbound. Therefore, you should first verify if the routing already exists by Sender Node and Receiver Node (not by Routing Name).

To add the missing routings, do the following:

a. On the Service Operations page, enter a Routing Name and then click the Add button to add the missing routing (do this for each missing routing).

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



Routing Definitions page

b. In the Sender Node field, enter the Sender Node.

c. In the Receiver Node field, enter the Receiver Node.

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d. Click the Save button.

e. Click the Return button.

f. Click Save.

Task 17-1-7: Purging the Domain Status for PeopleSoft CRM

The Domain Status should be purged.

To purge the domain status:

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

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

Domain Status page

2. Click the Purge Domain Status button.
3. Select the All Domains Active check box.
4. Click the Update button.

Task 17-2: Setting Up PeopleSoft HCM

This section discusses:

- Understanding Setting Up PeopleSoft HCM
- Setting Up Security for PeopleSoft HCM
- Setting up Nodes for PeopleSoft HCM
- Setting Up the Gateway for PeopleSoft HCM
- Setting Up Single Signon for PeopleSoft HCM
- Verifying or Modifying Service Configurations for PeopleSoft HCM
- Modifying Service Operations for PeopleSoft HCM
- Purging the Domain Status for PeopleSoft HCM

Understanding Setting Up PeopleSoft HCM

All of the steps in this section pertain to the PeopleSoft HCM application and must be performed while logged in to the PeopleSoft HCM application.

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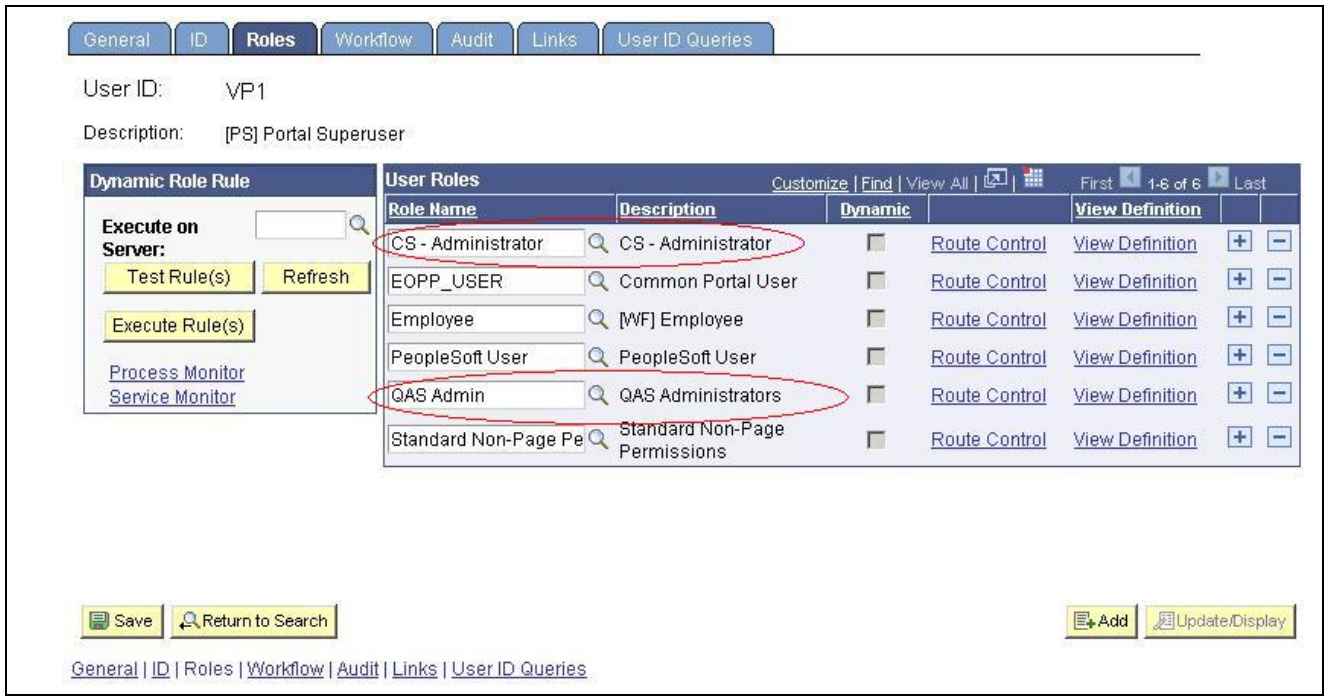
Task 17-2-1: Setting Up Security for PeopleSoft HCM

The user VP1 must have the QAS Administrator role.

To assign the QAS Administrator role:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. In the User ID field, enter *VP1* and click the Search button.
3. On the User Profiles page, select the Roles tab to access the Roles page, as shown in the following example:



User Profiles - Roles page

4. On the Roles page in the User Roles grid, if QAS Admin does not exist, click the Add button and add user role *QAS Admin*.
5. Click Save.

Note. Other roles may be required to execute queries in PeopleSoft HCM using user VP1 from PeopleSoft Manage Audiences. In this case, *CS_Administrator* has been added to allow access to certain Campus Solutions tables in PSQuery.

Task 17-2-2: Setting up Nodes for PeopleSoft HCM

The PeopleSoft CRM default local node must exist in PeopleSoft HCM as an active node.

To set up the PeopleSoft CRM default local node for PeopleSoft HCM:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. In the Node Name field, enter the node name (the default is *PSFT_CR*), and click the Search button.
3. If this node does not exist, you must create it.
4. Select the Node Definitions tab to access the Node Definitions page, as shown in the following example.

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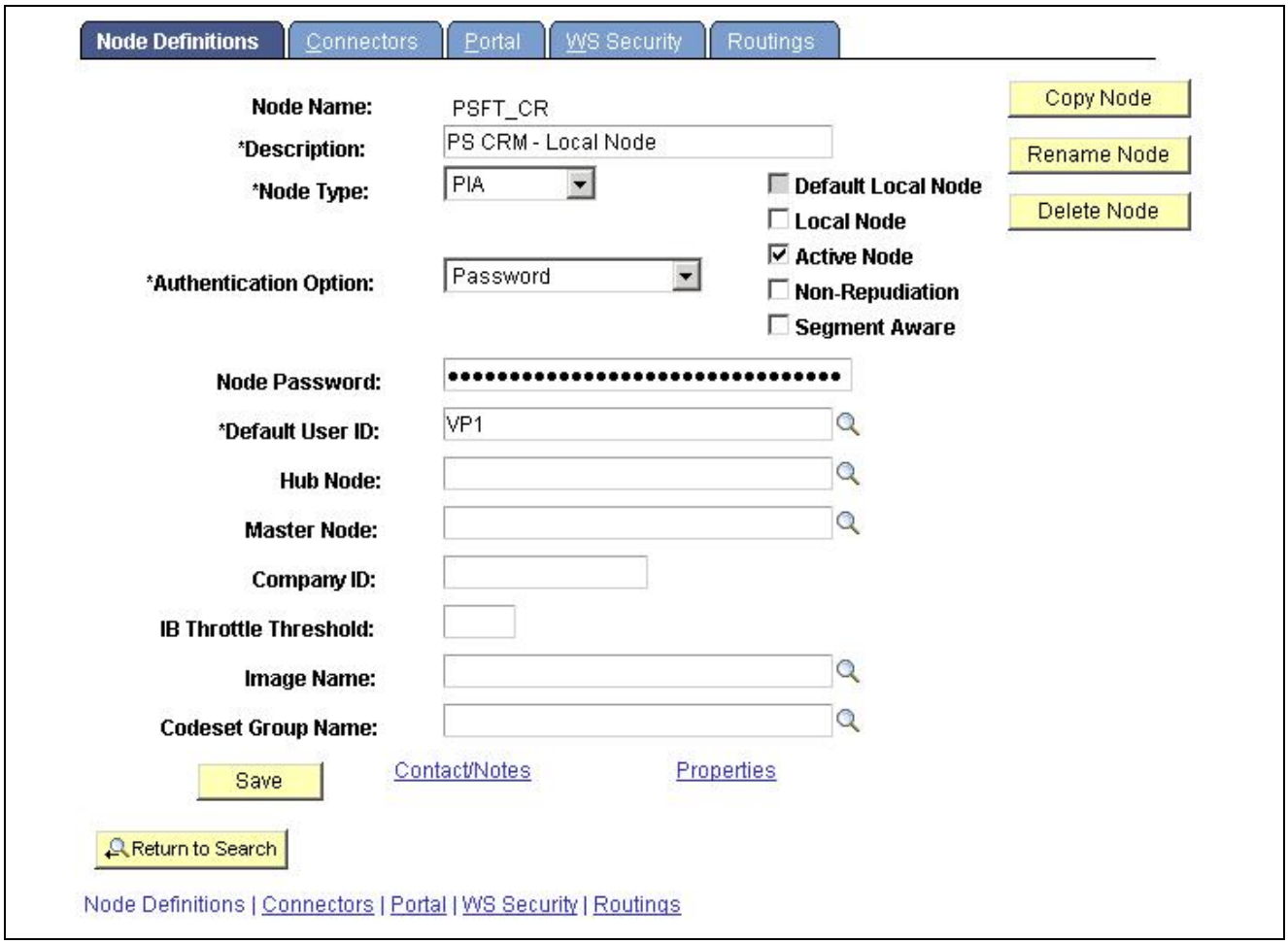

Nodes Definition page - PSFT_CR node

5. On the Node Definitions page, verify that *PIA* is selected in the Node Type field or select it now.
6. The Authentication Option, Node Password, and Default User ID should match what is defined on the PeopleSoft CRM system for this node.
7. Select the Connectors tab to access the Connectors page, as shown in the following example:

Connectors page with connector ID PSFTTARGET

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8. On the Connectors page, verify that *PSFTTARGET* is selected in the Connector ID field, or select it now.
9. Click Save.

Task 17-2-3: Setting Up the Gateway for PeopleSoft HCM

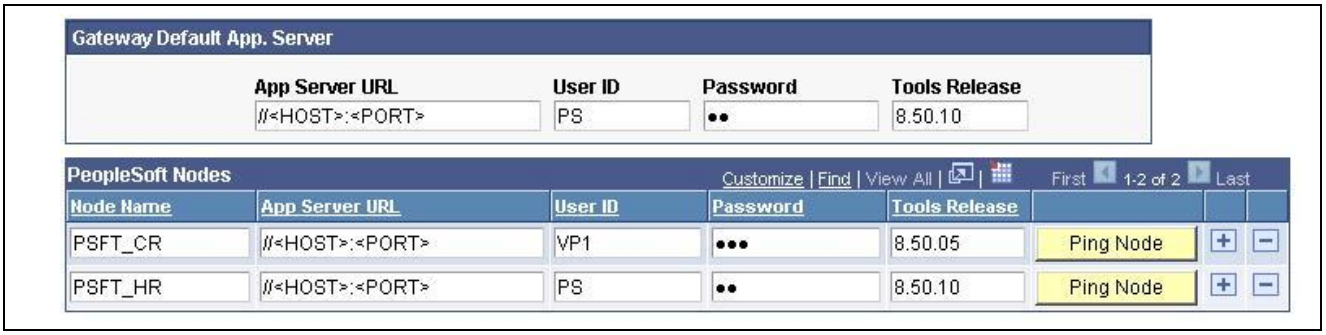
In this task you use the PeopleSoft Integration Broker Configuration page to add the PeopleSoft CRM default local node to the PeopleSoft HCM side of the PeopleSoft Integration Broker Gateway Configuration page.

To add the PeopleSoft CRM default local node to the PeopleSoft HCM side:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click the Search button. This should take you directly into the local gateway, unless other gateways are defined.

   If this is the case, select the local gateway to proceed.
3. Click the Gateway Setup Properties link.

   The Gateway Properties login page appears.
4. Enter the User ID and Password (defaults are *administrator* and *password*) to sign in to the Gateway Properties - Gateway Default App. Server page, as shown in the following example:



Gateway Default App. Server - PeopleSoft Nodes

5. On the Gateway Default App. Server page, if the PeopleSoft CRM node does not exist, click the Add button to add the CRM Node Name, App Server URL, User ID, Password and Tools Release.
6. Click Save.

Task 17-2-4: Setting Up Single Signon for PeopleSoft HCM

In this task you add the PeopleSoft HCM default local node and the PeopleSoft CRM default local node to the PeopleTools Single Signon page.

To add the PeopleSoft HCM and PeopleSoft CRM default local nodes to the PeopleTools Single Signon page:

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

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

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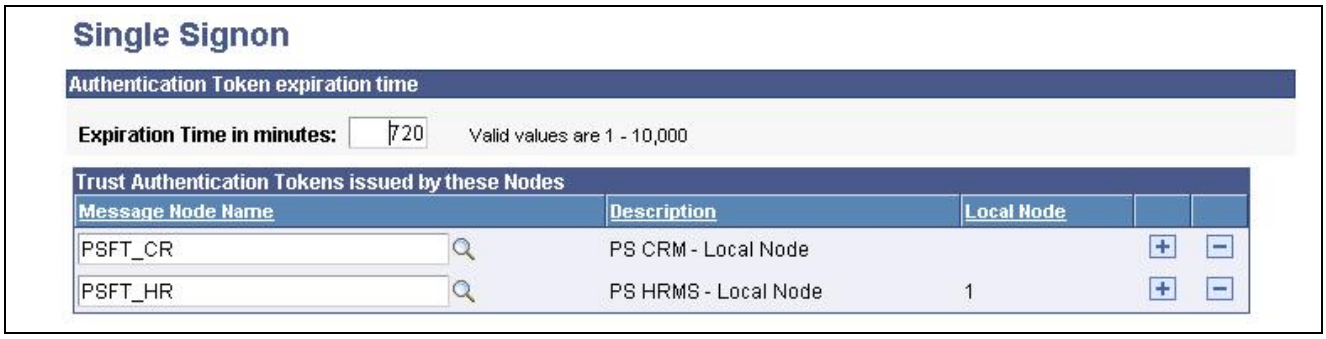


Single Signon - Trust authentication tokens and nodes

2. On the Single Signon page, if the PeopleSoft HCM and PeopleSoft CRM default local nodes do not exist, click the Add button to add the PeopleSoft HCM default local node and then the PeopleSoft CRM default local node in the Message Node Name fields.
3. Click Save.

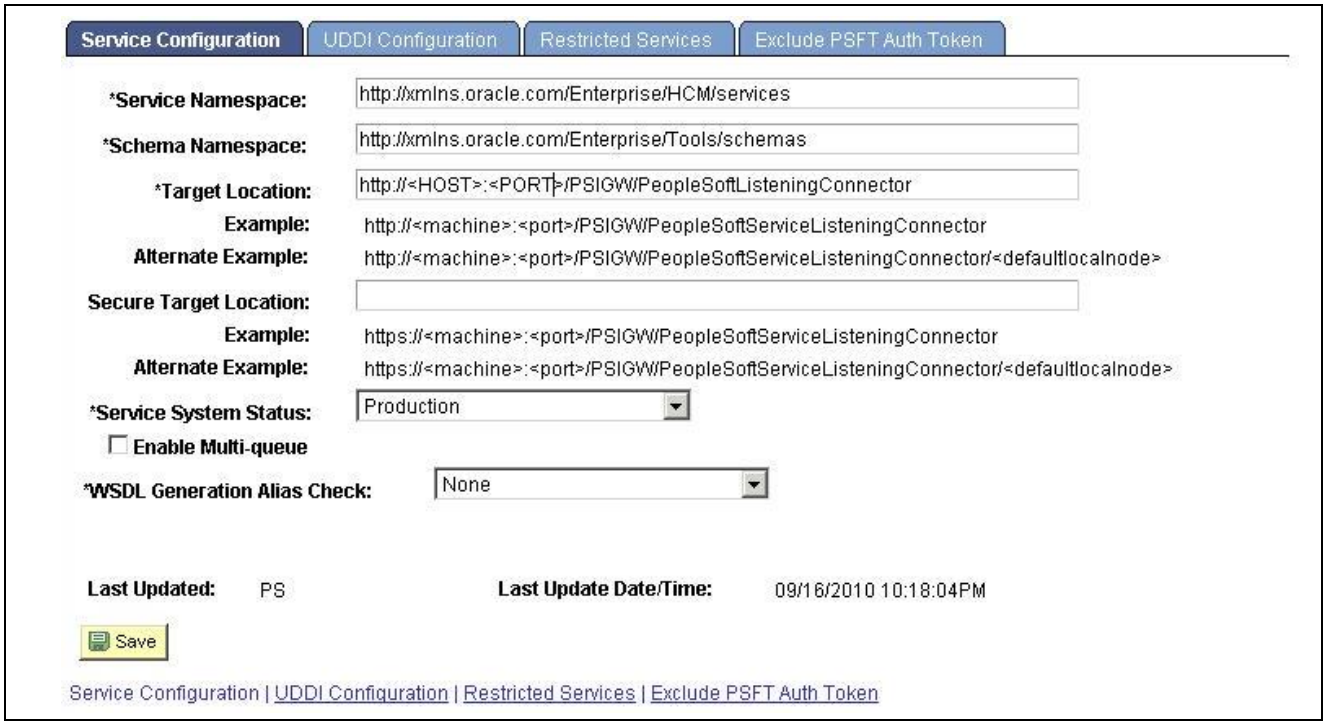
Task 17-2-5: Verifying or Modifying Service Configurations for PeopleSoft HCM

QAS is delivered as a restricted service.

To verify or modify this service configuration:

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

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



Service Configuration page

2. On the Service Configuration page, verify the path in the Target Location field or modify it now.

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3. Select the Restricted Services tab to access the Restricted Services page, as shown in the following example:

Restricted Services page

4. On the Restricted Services page, in the Services search field, enter *QAS* and click Search.
5. Verify that the QAS_QRY_SERVICE check box is *not* selected, or deselect it now.
6. Click Save.

Task 17-2-6: Modifying Service Operations for PeopleSoft HCM

The following three Service Operations must be modified to set the Security Verification, Service Operation Security, and Routings. You must do this for *each* of the Service Operations in the following table:

Reference Number	Service Operations
1	QAS_EXECUTEQRYSYNC_OPER
2	QAS_LISTQUERY_OPER
3	QAS_LISTQUERYPROMPTS_OPER

To modify the three required service operations:

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

   The Service Operations - General page appears.
2. On the Service Operations - General page, in the Service field, enter *QAS_QRY_SERVICE*.
3. In the Service Operations field, enter the value of one of the Service Operations in the preceding table.

   For example: QAS_EXECUTEQRYSYNC_OPER

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

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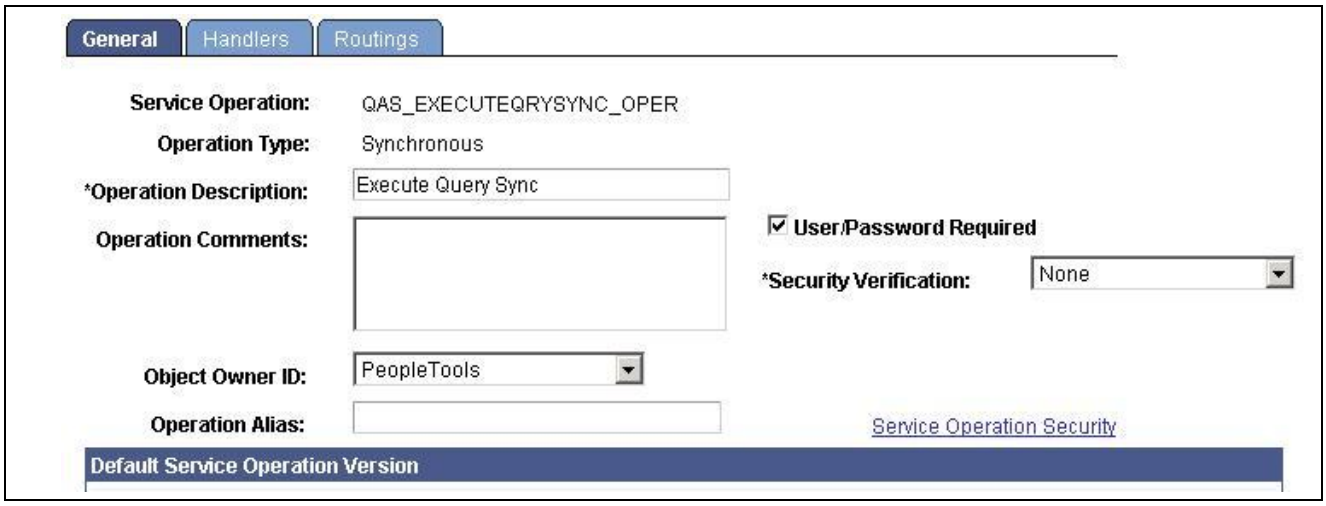

Service Operations - General page

4. In the Security Verification field, select *None* from the drop-down list.
5. Click Save.
6. Click the Service Operation Security link to access the Web Service Access - QAS_EXECUTEQRYSYNC_OPER page, as shown in the following example:

Web Service Access - QAS_EXECUTEQRYSYNC_OPER page

7. Click the Add button to add the permission lists in the following table:

Permission Lists	Access
PTPT1000	Full Access
PTPT2200	Full Access

8. Click Save.
9. Return to the Security Operations page (select PeopleTools, Integration Broker, Integration Setup, Service Operations) and select the Routings tab to access the Routings page.
10. On the Routings page, enter any missing routings from the following table. This table contains the necessary Routings and their corresponding Sender Node and Receiver Node names:

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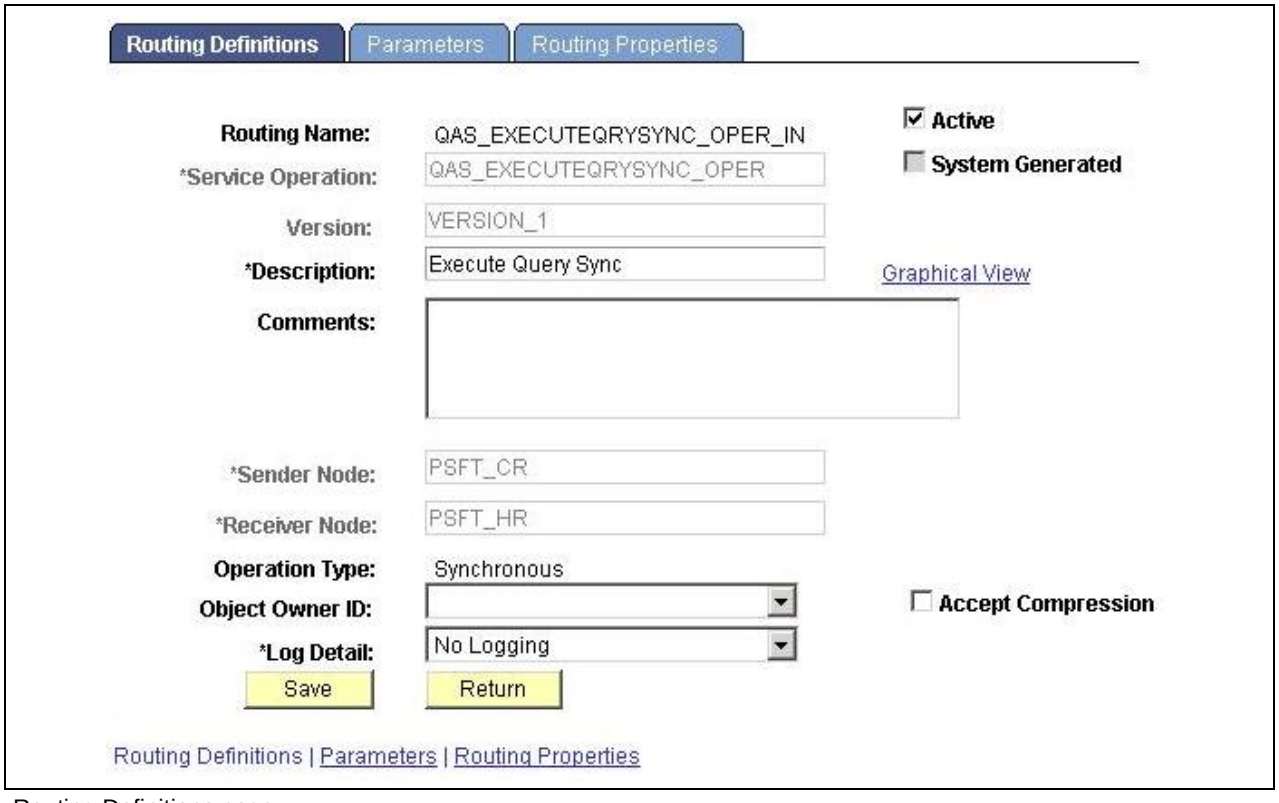
Reference Number	Service Operations	Routing Name	Sender Node	Receiver Node
1	QAS_EXECUTEQRYSYNC_OPER	QAS_EXECUTEQRYSYNC_OPER_IN	PSFT_HR	PSFT_CR
1	QAS_EXECUTEQRYSYNC_OPER	QAS_EXECUTEQRYSYNC_OPER_OUT	PSFT_CR	PSFT_HR
2	QAS_LISTQUERY_OPER	QAS_LISTQUERY_OPER_IN	PSFT_HR	PSFT_CR
2	QAS_LISTQUERY_OPER	QAS_LISTQUERY_OPER_OUT	PSFT_CR	PSFT_HR
3	QAS_LISTQUERYPROMPTS_OPER	QAS_LISTQUERYPROMPTS_OPER_IN	PSFT_HR	PSFT_CR
3	QAS_LISTQUERYPROMPTS_OPER	QAS_LISTQUERYPROMPTS_OPER_OUT	PSFT_CR	PSFT_HR

Important! The Routing Name is not significant except that it must be unique. The Sender Node and Receiver Node are important and determine whether the routing is inbound or outbound. Therefore, you should first verify if the routing already exists by Sender Node and Receiver Node (not by Routing Name).

To add the missing routings, do the following:

a. On the Service Operations page, enter a Routing Name and then click the Add button to add the missing routing (do this for each missing routing).

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



Routing Definitions page

b. In the Sender Node field, enter the Sender Node.

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c. In the Receiver Node field, enter the Receiver Node.

d. Click the Save button.

e. Click the Return button.

f. Click Save.

Task 17-2-7: Purging the Domain Status for PeopleSoft HCM

The Domain Status should be purged.

To purge the domain status:

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

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

Domain Status page

2. Click the Purge Domain Status button.
3. Select the All Domains Active check box.
4. Click the Update button.

Task 17-3: Planning for Unit Test

This section discusses:

- Creating a Query in PeopleSoft HCM
- Creating an Audience in PeopleSoft CRM

Task 17-3-1: Creating a Query in PeopleSoft HCM

In this task you create a query in PeopleSoft HCM that creates a list of EMPLIDs.

To create a query:

1. Login to the PeopleSoft HCM application.
2. Select Reporting Tools, Query, Query Manager.

   The Query Manager search page appears.

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Query Manager search page

3. On the Query Manager search page, click the Create New Query link.

   The Query Manager page appears.

4. Select the Records tab to access the Records page.

   The Records page appears, as shown in the following example:

Records page

5. On the Records page, select Search By Record Name and enter *EMPLOYEES*, and then click Search.
6. On the Records page, click the Add Record link beside recname EMPLOYEES in the search results grid, as shown in the previous example.

   The Query page appears, as shown in the following example:

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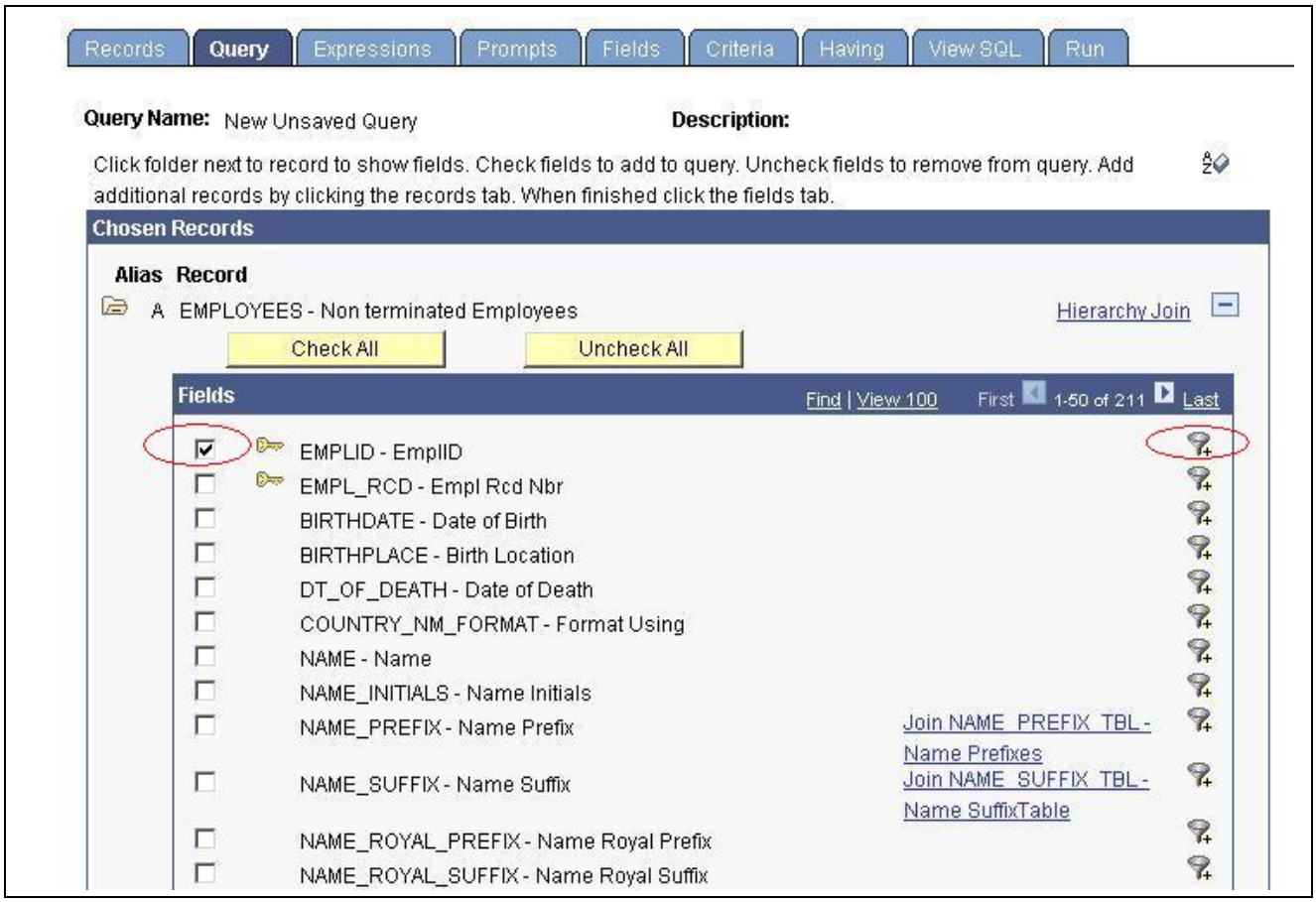

Query page

7. On the Query page in the Fields grid, select the EMPLID check box to include the EMPLID field in the results.
8. In the EMPLID Name field, click the filter icon.

   The Edit Criteria Properties page appears, as shown in the following example:

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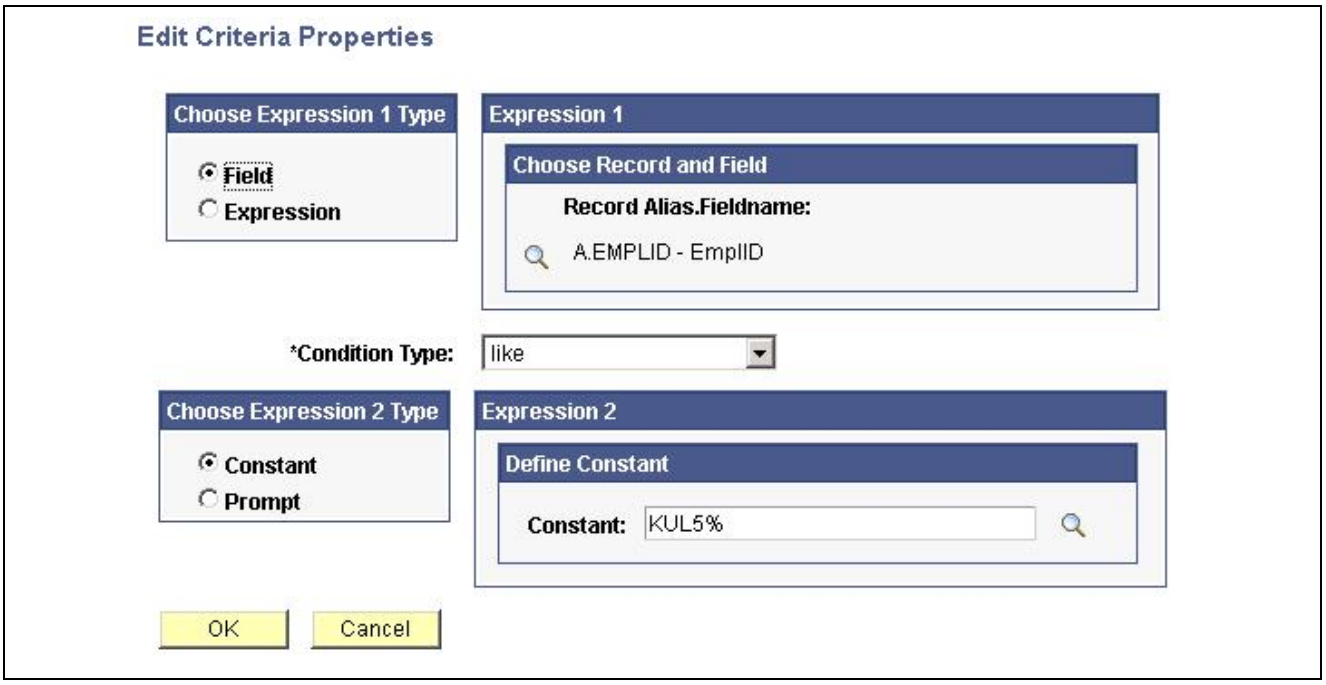
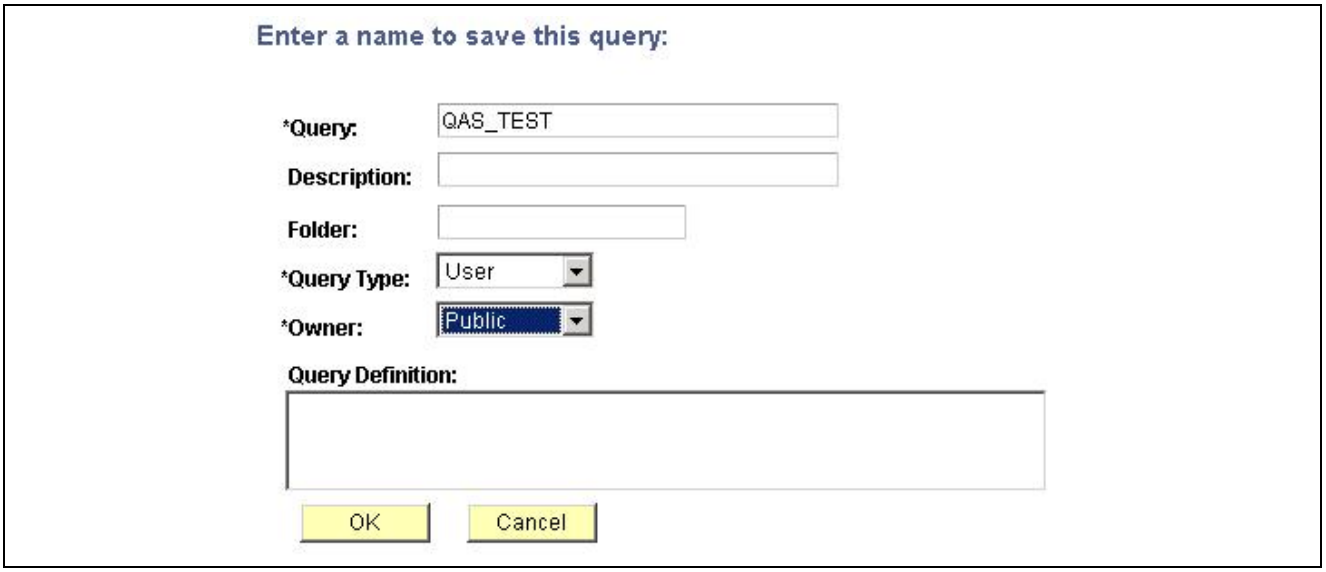


Edit Criteria Properties page

9. On the Edit Criteria Properties page, in the Condition Type field, select *like* from the drop-down list.
10. In the Constant field, enter *KUL5%*.
11. Click OK.
12. Click Save.

    The query Save page appears, as shown in the following example:



Save page

13. In the Query field, enter *QAS_TEST*.
14. In the Owner field, select *Public* from the drop-down list.
15. Click OK.

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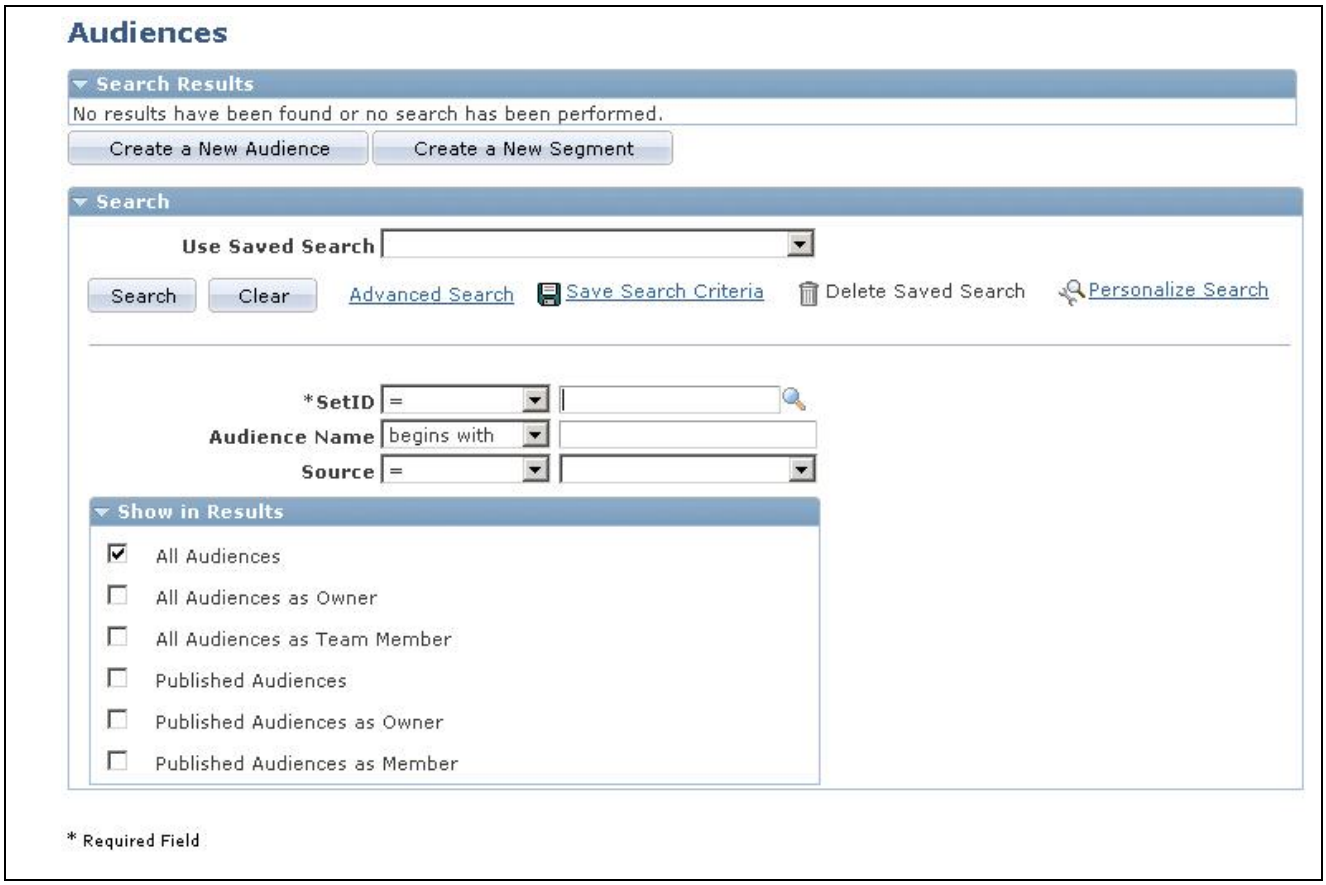
Task 17-3-2: Creating an Audience in PeopleSoft CRM

In this task you create an audience in PeopleSoft CRM.

To create an audience:

1. Login to the PeopleSoft CRM application.
2. Select Marketing, Manage Audiences.

   The Audiences search page appears, as shown in the following example:



Audiences search page

3. Click the Create a New Audience button.

   The Audience Detail - Add a New Value page appears, as shown in the following example:

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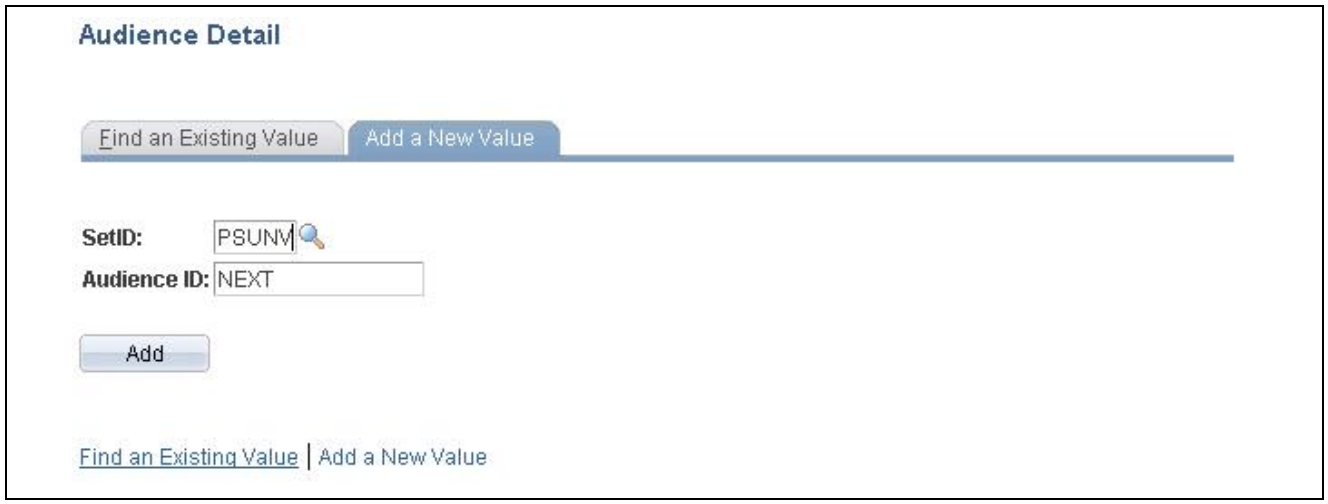
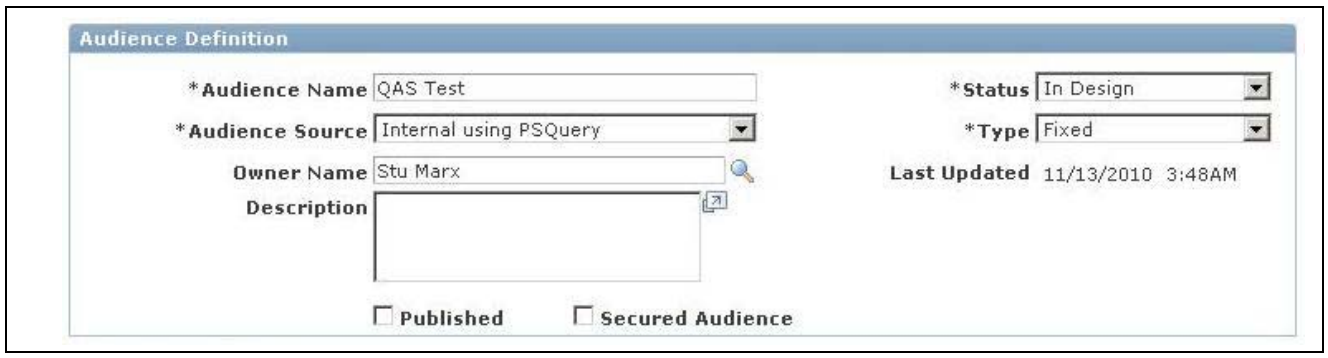


Audience Detail - Add a New Value page

4. On the Audience Detail - Add a New Value page, in the SetID field enter *PSUNV*.
5. Click the Add button to add a new audience.

   The Audience Detail page appears. Move to the Audience Definition group box to define values, as shown in the following example:



Audience Detail page - Audience Definition section

6. In the Audience Definition group box, in the Audience Name field, enter *QAS Test*.
7. In the Audience Source field, select *Internal using PSQuery* from the drop-down list.

   On the Audience Detail page, move to the Query Information group box to define values, as shown in the following example:

Audience Detail page - Query Information section

8. In the Query Information group box, for the Is Remote Query option, select *Yes*.
9. In the Remote Query field, enter *QAS_TEST*.

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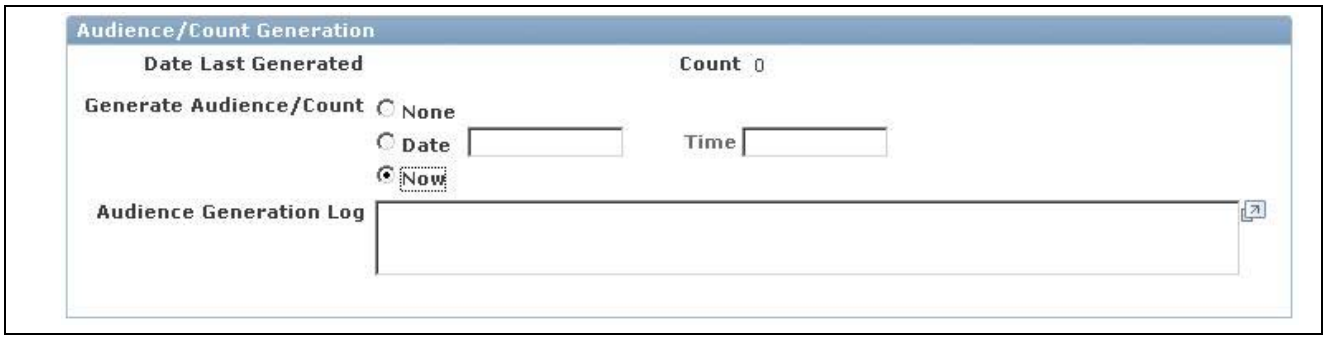
10. Click the List Queries button.

    A list of queries displays that includes the QAS_TEST query.

11. From the query list, select the QAS_TEST query link to display that query.

12. Click the Execute Query button.

    On the Audience Detail page, move to the Audience/Count Generation group box to define values, as shown in the following example:



Audience Detail page - Audience/Count Generation section

13. In the Audience/Count Generation group box, for the Generate Audience/Count option, select *Now*.

14. Click Save.

15. When the process scheduler indicates that the process is complete, you can view any added audience members on the Result List page.

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APPENDIX A

Reviewing PeopleSoft Tablespaces and Parameters

This appendix discusses:

- Understanding PeopleSoft OLM Tablespaces
- Resizing within PeopleSoft Customer Data Model
- Changing Parameter Values
- Reviewing Parameter Descriptions
- Reviewing the PeopleSoft OLM Component Port List

Understanding PeopleSoft OLM Tablespaces

This table contains the PeopleSoft Online Marketing 9.1 tablespace names and a description of each tablespace.

OLM 9.1 Tablespace Name	Tablespace Description
RYAPP	General tablespace that stores most of the application-specific data.
RYWORK	Tablespace for PeopleSoft OLM dedup tables that Mailcaster uses to prepare broadcast emails on Oracle.
RYLARGE	Tablespace for the following tables: • PS_RY_EM_DAY_CNT_1 • PS_RY_EM_DAY_CNT_2 • PS_RY_FREQ_CNT • RY_FLOW_INST • RY_DOC_SER • Document transaction tables

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OLM 9.1 Tablespace Name	Tablespace Description
RYLARG1	Tablespace for indexes on the following list of tables that contain email transaction history data: • PS_RY_BEMAIL_LOG • PS_RY_EMAIL_BOUNCE • PS_RY_EXP_EM_LOG • PS_RY_SMAIL_LOG • PS_RY_EMAIL_DISC • PS_RY_OPENMAIL_LOG • PS_RY_VC_EM_IMPR
RYLARG2	Tablespace for the following list of tables that contain web transaction history data: • PS_RY_WEB_LOG • PS_ RY_VC_WEB_IMP
PSINDEX	Tablespace for indexes of all OLM tables on Oracle.

Resizing within PeopleSoft Customer Data Model

In addition to the specific tablespaces that PeopleSoft OLM uses, some of the tablespaces within the PeopleSoft CRM Customer Data Model must be resized to handle the large growth of individuals and organizations. The following table lists the tablespaces that you must resize:

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Tablespace Name	Tables Affected by OLM Growth	Comments
RBLARGE	RBLARGE related tables affected by PeopleSoft OLM growth: • PS_CM • PS_BO_CM • PS_BO_CM_USE • PS_BO_ROLE • PS_BO_REL • PS_BO • PS_BO_MKT_DATA • PS_BC • PS_BO_NAME • PS_BO_TRIGGER • PS_RD_PERSON • PS_RD_COMPANY	Other tables use this tablespace; however, PeopleSoft OLM transactions affect the RBLARGE tablespace significantly.
PSINDEX	PSINDEX related tables affected by PeopleSoft OLM growth: • PS_CM • PS_BO_CM • PS_BO_CM_USE	
RABLARGE	RABLARGE related tables affected by PeopleSoft OLM growth: • PS_BO_BASIC_IND • PS_BO_BASIC_ORG	
RABINDEX	RABINDEX related tables affected by PeopleSoft OLM growth: • PS_BO_BASIC_IND • PS_BO_BASIC_ORG	

Note. Ensure that each of the tablespaces in the preceding tables are properly sized and active.

Task A-1: Changing Parameter Values

If you change the value of any parameters from the PeopleSoft Pure Internet Architecture Settings page, or you change and overwrite the value of Settings in any of the components configuration file (for example, DES.config, MCR.config, WDG.config, and ERP.config), you must stop and restart the components that are affected by the parameter before the new settings can take effect.

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Note. Script files for local use must be used to configure the Email Response Processor (ERP). The syntax of the scripting language is covered in the Email Response Processors Documentation.

Task A-2: Reviewing Parameter Descriptions

The following two tables describe the PeopleSoft OLM parameters. The first table includes parameters for DES, Mailcaster, and All. The second table includes parameters for Watchdog. The parameters are in alphabetical order within each table. These tables also indicate the PeopleSoft OLM component that uses each parameter.

Note. If you change the value of any parameters, you must stop and restart the components that are affected by the parameter before the new settings can take effect.

This table describes the PeopleSoft OLM parameters and includes parameters for DES, Mailcaster, and All:

Parameter Value	Components	Description
agingCacheLifeSpan	DES	For internal use only.
agingObjectAgeLimitMins	DES	For internal use only.
allowOwnRmiRegistry	Mailcaster	Start own RMI registry if none is currently running.
automaticMailJobRecovery	Mailcaster	Specifies whether the Mailcaster tries to automatically recover a running job that has not been updated for a specific period of time. If set to *false*, the Mailcaster does not attempt to recover the mail job, and the administrator must do so manually by stopping and starting the job using the Control Center. If set to *true*, the Mailcaster recovers the job, which can result in the sending of duplicate emails. The Mailcaster uses the mail jobs recovery log table to reconstruct the job. However, because there is a gap between sending the mail and writing to the recovery log, it is possible that one duplicate message will be sent per send mail thread. The default value is *true*.
broadcastRequestDESTimeout	DES	Specifies the timeout in milliseconds for broadcast requests.
bulkMailerDropDedup	Mailcaster	Specifies whether to drop the Dedup table after mail job has completed successfully. The default is *true*.
bulkMailerMaxErrorRetryAttemps	Mailcaster	Specifies the number of attempts that the Mailcaster will make to connect to the SMTP server before raising an error. (Note that the misspelled word *Attemps* must be entered as shown in the parameter value column of this table.)

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Parameter Value	Components	Description
cgiProgramPath	All	Specifies the path of the web server gx.cgi program. The default is DCS. Also used by PeopleSoft OLM to tell the Campaign Server to clear cache, and to generate the Dialog Link Report. To ensure that the path information is read correctly at startup, you should set this value in the configuration files, rather than using the Settings feature in the Online Marketing Client.
clearCacheGracefully	DES	Specifies a method to clear cache.
clearCachePerObject	DES	Specifies a method to clear cache deeply.
clearCacheThreads	DES	Specifies the number of threads that clear cache in the background.
clearCacheTimeoutSecs	DES	Specifies the time in seconds for a clear cache request to time-out.
clearCacheWait	DES	Specifies the time in milliseconds to wait for current clear cache requests to finish.
companyBasicsProfileName	DES	For internal use only.
contactBasicsCompanySysldElementName	DES	For internal use only.
contactBasicsProfileName	DES	For internal use only.
ConnectId	All	Specifies the DB User Name.
ConnectPswd	All	Specifies the DB User password.
contentTransferEncoding	Mailcaster	Allows the email header to support 8bit characters. The default for email header is 7bit. To change the default, add this parameter through the Online Marketing Client in Settings as: *contentTransferEncoding=8bit.*
createObjectsInExternalThread	DES/ERP	Specifies to create and destroy Jolt Connection in a separate thread.
dialogmoverOperationTimeout	DES	Specifies the Dialog Mover execution timeout. (60*1000=i minute)
dedupDisablePageLockMSSQL	DES	Avoids page locking on MSSQL while deduping (experimental).
debugFileSeverityThreshold	All	Specifies the debug log error severity level (not including trace lines).
dbServerURL	All	Specifies the path or address that the PeopleSoft OLM components use to connect to the database, for example: • MSSQL: jdbc:sqlserver://host:port;DatabaseName=instance;sql70=true;charset=Cp1252 • ORACLE: jdbc:oracle:thin:@host:port:instance • DB2UDB: jdbc:db2://host:port/instance

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Parameter Value	Components	Description
dbVendor	All	Specifies the database that you are using, for example: • MSSQL • ORACLE • DB2UDB
dedupAllowDirtyReadMSSQL	DES	*(MSSQL only)* Specifies whether to allow dirty read on the PS_RY_BASIC_IND table during de-duping. The default value is *false.* When the parameter is set to *false,* the deduping process gets clean data, but can block other components from updating the basic individual table. When the parameter is set to *true*, the deduping process gets dirty data, allowing a higher level of concurrency on the basics individual table.
dedupIndexSpace	DES	Specifies the database tablespace in which the dedup index tables are created. This parameter can be used to improve the performance of the system. Contact your database administrator for more information.
dedupPickRecordWithMaxCompanySysID	DES	Takes effect only when de-duping on BO_ID (Unique System ID) and at least one of the audiences is of type Contact. The default value is *true.*
dedupTableSpace	DES	Specifies the database tablespace in which the dedup tables are created. This parameter can be used to improve the performance of the system. Contact your database administrator for more information.
defaultDateFormat	All	Default Date format with values such as *DD/MM/YYYY.*
defaultProcessSize	DES	Specifies the maximum number of actions that can be created in the Reach or Response side of the process tree. The default value is *200.*
DefaultTimeFormat	All	Specifies the Default Time format. Possible values are *HH:MM* or *HH:MM AM/PM*.
defaultURLBase	DES/Mailcaster	Specifies the base of the URL that the Campaign Server and Mailcaster adds to all links. The format is: defaultURLBase=<*URL of online dialog webserver*>
delayForDBCheck		Specifies the number of seconds DES waits before attempting a database connection, to prevent starting before the database is available. This parameter applies only at database initialization. The default is *15 seconds.*
directURLBase	DES	Specifies the direct URL of the DES (http://<*hostname*>:port)

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Parameter Value	Components	Description
DoVCImpressionLogging	DES/Mailcaster	Enables (yes) or disables (no) the VC impression logging. Default is *yes.* Use this log to track VC related information. The data is not actually exported to any OLM reports, so you can disable this logging to get better performance as necessary.
domainName	DES/Mailcaster	Specifies the domain name that identifies your site on the internet. For PeopleSoft OLM, this is *yourdomain*.domain.
doNotEMailDefault	DES/Mailcaster	Specifies the default value to be stored in the people profile (in the Do not email field) when a new contact record is added. If it is *true*, then new contacts will not be contacted through bulk email. If it is *false* (the default), then contacts can be contacted. This default value can be overridden by the dialog process or respondent input.
doNotEMailProfileElementName	DES/Mailcaster	For internal use only.
emailAddressProfileElementName	DES	Specifies the name of the Email Address profile field in the Individuals.People profile. The default value is *Email.*
errorFileSeverityThreshold	All	Specifies the error log severity level.
eventWireGifFileName	DES	Customize the DES default 1x1 clear gif file.
extensionsDir	DES/Mailcaster	Specifies the directory where the Live Extension servlet jar files exist.
extensionTimeout	DES	Specifies the extension execution timeout.
heartbeatInterval	DES	Lifecycle management heartbeat interval.
https	DES	Indicates whether connections to the Control Center must be secure. If you want to require secure connections, you must set *https=On.* Any other value, such as *on* using a lowercase *o* indicates that a secure connection is not required.
httpSessionTimeoutMins	DES	Specifies the logged-in session time out in minutes in the range of 1 to 60 mins.
jpmWaitForShutdownInMinutes		Specifies the delay from the last action when the Java Process Monitor will shut itself down.
isDebugOutputToHTMLEnabled	DES	For internal use only.
isDESMultiInstance	DES	Indicates that the DES has multiple instances.
jmsContextFactory	DES	JMS Context Factory.
jmsProvider	DES	Specifies the vendors of web server software. Possible values are: *BEA-WLS* or *IBM-WAS*
jmsProviderUrl	DES	JMS Provider URL
jmsServiceLocator	DES	JMS Service Locator.
jmsTopicConnection	DES	JMS Topics Connection.
jmsUser	DES	JMS User.
jmsUserPassword	DES	JMS User Password.

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Parameter Value	Components	Description
jdbcDriver	DES/Mailcaster	This is the JDBC driver that the PeopleSoft OLM components use to access the database. Default values are: • MSSQL: com.microsoft.sqlserver.jdbc.SQLServerDriver • ORACLE: oracle.jdbc.driver.OracleDriver • DB2UDB: com.ibm.db2.jcc.DB2Driver
jobRecoveryExpireInHours	Mailcaster	Specifies the time period, in hours, after which mail jobs will not be recovered. The default is *96* and the parameter must be set to a value greater than 0. This parameter is useful in cases with time-sensitive audiences or time-sensitive content for a mailing.
joltSessionRecycleCount	DES	Specifies the number of requests for which the Jolt NetSession will be reused before it closes. After a Jolt NetSession closes, a new Jolt NetSession will be created as necessary. The default value is *0*, meaning that Jolt NetSessions never expire.
largeJobOnly	Mailcaster	If the mailcaster is a large mailcaster and the largeJobOnly value is set to *true*, then the mailcaster will only pickup large jobs. The default is *false* (should be in per mailcaster config file).
localHostName	DES/Mailcaster	Specifies the host name of the machine where Mailcaster is running and is used to communicate with the SMTP mail servers.
logBaseName	All	Specifies the prefix for log and error files, for example DES, WDG, and so on (should be in per application config file).
logPath	DES/Mailcaster	Specifies the directory for the log file. The default is the current working directory.
numberFrequencyCheckThreads	Mailcaster	Specifies the number of threads to use to process frequency counter checking.
numberRenderingThreads	Mailcaster	Specifies the number of rendering threads.
mailCasterMaxGettransactionRetry	Mailcaster	Specifies the number of times to attempt to get a DB transaction (connection) before giving up.
maxBulkMailMessagesPerHour	Mailcaster	Specifies the number of emails each Mailcaster sends per hour when PeopleSoft OLM components share a mail server with other users. This enables you to limit the number of emails each Mailcaster sends per hour. For example, if you have 3 Mailcasters and you set this parameter to 100, each Mailcaster will send out a maximum of 100 messages per hour for a total maximum of 300. The default setting is *0*, which means NO limit.
maxDESInstances	DES	Specifies the number of DES servers in the cluster.
maxMailQueueSize	Mailcaster	Specifies the size of the mailcaster internal message queue.
maxFrequencyCheckQueueSize	Mailcaster	Specifies the maximum size that the queue of messages awaiting the frequency counter checking can grow to.

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Parameter Value	Components	Description
maxJobSize	Mailcaster	Specifies the maximum size for a child mailjob. The default value is *10000*, and the parameter must be set to a value greater than that set for minJobSize.
maxLogFileCount	DES/Mailcaster	Specifies the maximum number of log files to create. The default setting is *10*.
maxLogFileSize	DES/Mailcaster	Specifies the maximum size of the log files in bytes. The default setting is *10 MB*.
maxPooledGenericThreads	DES	Specifies the maximum number of Generic Threads that are used by Scheduler and Broadcaster.
maxRenderMailQueueSize	Mailcaster	Specifies the maximum number of messages in the rendering queue.
maxRetriesForDBCheck	DES	Specifies the number of times DES tries to establish connection with the database, to prevent it from starting before the database is available. This parameter applies only at database initialization. The default is *8* times.
maxSendMailQueueSize	Mailcaster	Specifies the maximum number of mails in the send queue.
maxThreads	DES	Specifies the maximum size of the Live Extention pool.
maxUploadSize	DES	Specifies the maximum file upload size. You should consult your web server documentation when setting maximum file size, to ensure that the settings are compatible between the web server and PeopleSoft OLM. If the web server settings are significantly higher than those in PeopleSoft OLM, performance can be affected.
minJobSize	Mailcaster	Specifies the minimum size for a child mailjob. The default value is *2000*, and the parameter must be set to a value greater than 0 and less than maxJobSize.
OMKDESSecurityService	DES	JMS Security Service.
OMKDESDestination	DES	Specifies the JMS Destination (TOPIC/QUEUE) for DES.
orgRoleTypeIdProfileElementName	DES	Specifies the name of the organization role type profile element in base language.
percentageJobSize	Mailcaster	Specifies the percentage of a large (parent) job to use as a child job size. The default value is *3* and the parameter must be set to a value greater than 0.
pollingInterval	Mailcaster	Specifies in minutes the frequency with which the Mailcaster checks the mail job queue. The default setting is *1*.

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Parameter Value	Components	Description
preloadCampaign	DES	Specifies the names of dialogs to be loaded into memory at server startup, thus reducing the time the customer must wait to view the dialog. The format is: **preloadCampaign=Dialog1,di alog 2,Dialog33 for Staging** You can specify multiple dialogs by separating their names (including spaces) with commas. Do *not* include spaces before or after commas.
psAppServerURL	DES	Specifies the URL of the PeopleSoft Application Server and JOLT port where publish/subscribe is enabled. For failover, you can use a comma-separated list. For example: //mymachine1:9000,//machine2:9050 This parameter is usually set in the PeopleSoft Online Marketing Client Settings.
psIBLocalNode	DES	Specifies the name of the PeopleSoft Integration Broker default local node for the Application Server.
psIBLocalNodePassword	DES	Specifies the password (if any) for the PeopleSoft Integration Broker local node. The value is encrypted in the configuration file.
psJoltSessionCount	DES	Specifies the maximum number of JOLT sessions. The DES will pre-allocate half at startup.
psOperatorID	DES	Specifies the PeopleSoft user ID. Select a user ID with the PeopleSoft Administrator role, such as the OLM user.
psOperatorPassword	DES	Specifies the PeopleSoft user password.
psPIAServerURL	DES	Specifies the PeopleSoft CRM PIA Server URL: http:// <PIA web server:port>
psPIAServerWebsiteName	DES	Specifies the PeopleSoft CRM PIA server website name.
psToolsRel	DES	Specifies the PeopleSoft PeopleTools version number. The default value is *8.48*, which is specified in the PeopleSoft Online Marketing Client Settings.
restoreCheckInterval	DES	Specifies the interval in milliseconds between checks to see whether an object is fully restored or not. The default is *100 ms*.
rmiPort	Mailcaster	Specifies the port on which RMI can be contacted. The default is *1099*.
roleTypeIdProfileElementName	DES	Specifies the name of the individual role type profile element in base language.
schedulerFailInterval	DES	Specifies the amount of time, in hours, the scheduler should wait before assigning a FAILED status to a mail job. The default is 24 hours. If a job is likely to take longer than 24 hours to dedup, this parameter should be added to the DES.config file with a longer duration.

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Parameter Value	Components	Description
schedulerServiceNumberOfJobs	DES	Specifies the number of jobs that can be run per scheduler wake-up.
schedulingTimeoutMins	DES	Specifies in minutes the time the scheduler recovers the timed out event and re-sends for processing. The maximum value is 30 mins and the minimum is 5 mins. If any event is being scheduled, that is, the state is SCHG (scheduling) for more than the set value, the scheduler recovers this event and re-sends for processing.
signatureAlgorithmKey	DES/Mailcaster	Specifies the encryption algorithm key used for the magic number. The key must be between 15 and 2^63 digits. If the key is not set, or is set incorrectly, a default value is used.
signatureLength	DES	Specifies the length of the signature in bits, from 0 to 48 (0 = no signature). The default length is *48.*
smallAudienceThreshold	DES	Specifies a threshold number of contacts in an audience. Below this number, PeopleSoft OLM uses a small Mailcaster to send email. The default is *100.*
smallAudienceThreshold	Mailcaster	Specifies the threshold for the Mailcaster job priority. If the maxJobSize is larger than the smallAudienceThreshold, the Mailcaster will work on large jobs as its first priority. If the maxJobSize is less than or equal to the smallAudienceThreshold, the Mailcaster priority will be small jobs.
smallJobOnly	Mailcaster	Specifies whether the Mailcaster will only try to process small jobs (jobs below the threshold set by the smallAudienceThreshold parameter). If set to *True*, the Mailcaster will only process small jobs. This parameter is ignored if the maxJobSize parameter is greater than or equal to the smallAudienceThreshold parameter.

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Parameter Value	Components	Description
smtpServerNames	DES/Mailcaster	Specifies a semicolon-separated list of SMTP mail servers that are used by the PeopleSoft OLM server and the Mailcaster and contains the following format: **`hostName[:portNumber]`** **`[:threads=n][;...]`** The normal SMTP port number is used if `portNumber` is not provided. `threadCount` is used only by the Mailcaster to determine how many internal threads will be used to send mail to smtp server. Examples: • `mail1.pscrm.com` Uses one mail server on mail1.pscrm.com • `mail1.pscrm.com;mail2.pscrm.com` Uses two mail servers, one on mail1.pscrm.com and the other on mail2.pscrm.com • `mail1.pscrm.com:1025;mail2.pscrm.com:1025` Uses two mail servers on port 1025, one on mail1.pscrm.com and the other on mail2.pscrm.com • `mail1.pscrm.com:threads=5` Uses five connections to mail1.pscrm.com. • `mail1.pscrm.com:25:threads=5;` `mail2.pscrm.com:25:threads=3` Uses five connections to mail1.pscrm.com on port 25 and three connections to mail2.pscrm.com on port 25.
smtpThreadPollingInterval	Mailcaster	Specifies in minutes how long the Mailcaster threads wait before reconnecting to the SMTP server after being disconnected. The default is *10* minutes.
threads	Mailcaster	Specifies the number of send mail threads.
transactionPoolDelayInMinutes	DES/Mailcaster	Specifies how often the DES checks the thread pool for stale database connections (value in minutes). The default is 5; allowable values are 1 through 60.
transactionPoolMaxSize	DES/Mailcaster	Specifies the maximum number of database connections to be pooled. The number of connections may exceed this value, but those connections will not be pooled. The default is *20*; allowable values are 0 through 200. Setting this value to 0 means unlimited pool size.

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Parameter Value	Components	Description
transactionPoolMinSize	DES/Mailcaster	Specifies the initial database connection pool size. This value must be less than connectionPoolMaxSize. The default is *1*; allowable values are 0 through 199.
transactionPoolStaleInMinutes	DES/Mailcaster	Specifies the amount of time idle connections should remain in the pool (value in minutes). The default is *20*; allowable values are 0 through 1440 (24 hours).
trimSpaces	DES	Allows the leading and trailing blanks to be stripped from text fields. The parameter applies to all text fields—either all or none are stripped. Valid values are *true* and *false*; the default value is *true*.
uploadInMemorySize	DES	Specifies the location of temporary storage for uploaded files.
uploadTempStorage	DES	Sets the size threshold beyond which upload files are written to the temporary disk storage location.
useAutoUndoOracle	DES/Mailcaster	Boolean flag to indicate whether the Oracle database is in automatic undo mode or not. The default value is *false.*
useJoltRetry	DES	Tells netSession API to use Jolt retry. The default value is *false.* We recommend that you do not modify this value.
HAS_FIREWALL	Mailcaster	If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the mailcaster's RMI server object to listen on a specific port. This parameter must be set to *true* to add into the MCR.config file.
FIREWALL_PORT	Mailcaster	If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the mailcaster's RMI server object to listen on a specific port. This parameter must be set to add into the MCR.config file.

This table describes the PeopleSoft OLM parameters and includes parameters for Watchdog:

Parameter Value	Components	Description
daysInThePast	Watchdog	The period of time Watchdog should monitor failed or stopped jobs and events
debug	Watchdog	Enable watchdog specific debugging. Values are *YES* or *NO.*
defaultHostName	Watchdog	The name of the machine Watchdog is running on.
defaultRecipient	Watchdog	Recipient to use when testing mail server.
defaultSender	Watchdog	The Sender to user on Watchdog mail reports.
demoCampaignMagicNumber	Watchdog	The magic number of the PeopleSoft Online Marketing Dialog to use as test that the DES is running properly. This should include the "p=" along with the magic number. A good demo campaign contains a landing page and a final page.
domainName	Watchdog	The domain name of the machine that is running Watchdog. For example, abc.com.

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Parameter Value	Components	Description
expectedResponseAfterGet	Watchdog	A string for Watchdog to look for in the server's response to a get. This would be part of the landing page.
expectedResponseAfterPost	Watchdog	A string for Watchdog to look for in the server's response to a post. This would be the final page or a response to the submission of the landing page.
iAmAliveInterval	Watchdog	Time between *I am alive* messages.
iAmAliveMailList	Watchdog	A semicolon-separated list of email addresses to send *I am Alive* messages to. The *I am alive* message is to track that Watchdog is still running, even if no error reports are being sent.
iAmAliveSubject	Watchdog	The subject line to use for *I am Alive* messages.
instanceId	Watchdog	Specifies the instance ID of this Watchdog, a numeric value. No default value and does not allow null.
interval	Watchdog	Specifies the number of minutes that Watchdog sleeps between running system check. The default is *30 minutes.*
logFileMaximumSize	Watchdog	Specifies the maximum size of a log file before rolling over. Values can end in *K* for kilobytes or *M* for megabytes.
loops	Watchdog	Specifies the number of times that Watchdog will run loop. A *0* (zero) means indefinitely. The default is *0.*
machinesToPing	Watchdog	Specifies a colon (:) delimited list of machines to ping. All required servers (such as database servers, mail servers, and so on) should be included in the list.
mailJobLastModifiedHours	Watchdog	Specifies the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, Minutes and Seconds are added up.
mailJobLastModifiedMinutes	Watchdog	Specifies the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, Minutes and Seconds are added up.
mailJobLastModifiedSeconds	Watchdog	Specifies the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, Minutes and Seconds are added up.
mailMax	Watchdog	Specifies the maximum number of attempts to send a report before giving up. The default is *5*.
mailSendOutRate	Watchdog	Specifies the mailcaster send rate in mails per minute. If a mailcaster falls below this threshold, a warning is given.
mailSendOutRateCheckInterval	Watchdog	Specifies the interval in minutes for running the mailSendOutRate. This value must be an even multiple of the interval parameter. For example, if *interval=30*, then this value must be 30, 60, 90, and so on.

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Parameter Value	Components	Description
maxMemorySize	Watchdog	Specifies the maximum memory setting for the DES server (that is, the –Mx Java command line argument used). Values can end in *G* for gigabytes, *M* for megabytes, *K* for kilobytes, or nothing, in which case bytes are assumed (for example, 64M).
maxTargetListDedupTime	Watchdog	Maximum time in minutes for a dedup to run. This value must be an even multiple of the "interval" parameter. For example, if interval=30, then this needs to be 30, 60, 90, and so on.
memoryAlertPercentage	Watchdog	The percentage of max memory used before sending a warning. For example, if set to "50" and the maxMemorySize were 64M, then memory use over 32 megabytes would register as a failure.
numberOfBackUps	Watchdog	Specifies the number of backup log files.
numberOfObservers	Watchdog	Specifies the number of monitor threads for Watchdog. Always set to *1*.
ping	Watchdog	Enables a ping test in Watchdog. The ping validation tells you if a host is alive. Values are *YES* or *NO*. The default is *YES*.
pingCommand	Watchdog	Specifies the ping command for the system. Use the full path for this command and do not assume the use of the "PATH" variable.
pingCommandPostHost	Watchdog	Specifies the parameters for the ping command for this Watchdog system (default value is empty). To set Watchdog to test using "/usr/bin/ping machine_name-a", make the following settings: pingCommandPreHostto '/usr/bin/ping' and pingCommandPostHost '-a'
pingMax	Watchdog	Specifies the number of times that Watchdog will attempt to ping a server before giving up. The default is *20*.
pingOkString	Watchdog	Specifies the beginning text of a successful response from the ping command. The default *Reply from* is used.
pingTimeoutCmdPosition	Watchdog	Specifies the relative position of the ping timeout to the host name. Values are *front* or *rear*. On Win/NT, use *front* for "ping –w 30 hostname" and on UNIX use *rear* for "ping hostname 30".
pingTimeoutCommand	Watchdog	Specifies the argument to pass to ping command to specify a timeout. On Win/NT, this should be "–w" to make the used ping command "ping –w 30 hostname". On UNIX, do not set this value.
pingTimeoutValue	Watchdog	Specifies the number of milliseconds ping will wait for a response (timeout done by ping command). The default is *30 milliseconds*.

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Parameter Value	Components	Description
pingWait	Watchdog	Specifies the number of milliseconds between consecutive ping commands. The default is *15000 milliseconds.*
qkLookPort	Watchdog	Specifies the port number that Watchdog will use for the quick status report. The default is *6700.* To get the report, open a connection from a browser to the URL `http://<host>:<qkLookPort>` (for example, `http://foo.abc.com:6700`). This will return a copy of the last report sent and will also wake the watchdog, if it was sleeping, to run the validation again.
queryToSubmit	Watchdog	Specifies a URL encoded query that watchdog will send to the web server. This would include form fields from the demo dialog's landing page. For example: "First$Name=foo&Last$Name= bar&johnDrake=xxx"
queuedEventMinusDays	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
queuedEventMinusHours	Watchdog	Specify the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
queuedEventMinusMinutes	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added together.
queuedMailcasterMinusDays	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added up.
queuedMailcasterMinusHours	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added up.
queuedMailcasterMinusMinutes	Watchdog	Specifies the maximum duration a mail job should be in a queued state. The Days, Hours and Minutes are added up.
returnPath	Watchdog	Specifies the return path for the Watchdog reports. This return path should be a valid mailbox, as bounced mails will come to this address.
rmi	Watchdog	Specifies if Watchdog should use RMI to check mailcaster process status.
rmiBasedCheck	Watchdog	Specifies whether to check the Bulk Mailer status using rmi. The value is *True* or *False*. Default values is *False*.
rmiPort	Watchdog	Specifies the port to use for RMI connections to the mailcasters. The default is *1099.*
runningEventMinusDays	Watchdog	Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
runningEventMinusHours	Watchdog	Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.

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Parameter Value	Components	Description
runningEventMinusMinutes	Watchdog	Specifies the maximum time the scheduler should take to update a campaign event state. The Days, Hours and Minutes are added together.
sentOverQueuedRatio	Watchdog	Checks for the number of mails sent compared with the mails queued. This is used like “SentMessages < sentOverQueuedRatio * QueuedMessages”. Due to bad email addresses, the number of mails sent should always be lower than that queued. However, a very high discrepancy may be a warning of poor data integrity or of failing mail servers.
service	Watchdog	Writes debug information to a log file or the screen. Values are *YES* to write to a log file, or *NO* to write to the screen.
showMemoryUsageInErrorMsg	Watchdog	Shows memory use in the Watchdog report. Values are *YES* or *NO*. The default is *NO*. While more informative, this causes the Watchdog reports to be sent out more often, as reports are sent when the report contents change. When showing the actual memory in use, they will most likely change with each run.
socketTimeOut	Watchdog	Specifies the number of seconds before Watchdog stops waiting for a response on a socket. Timeout of *0* will never cause a connection to timeout. The default is *60 seconds.*
timeDifference	Watchdog	Specifies in milliseconds the waiting time for Watchdog between the launching of 2 series of tests. The default is *1000 milliseconds.*

Task A-3: Reviewing the PeopleSoft OLM Component Port List

Many communications exist between PeopleSoft OLM components. This table provides more detail:

Communication Direction	Port For:	DES Configuration Parameter	Value	Port Default Value
DES to PS Application Server	JOLT	psAppServerURL	//<appserv host>: <jolt port>	none
DES to PIA	PIA HTTP	psPIAServerURL	http:// <CRM PIA web server:port>	none
DES and PIA to FTP Server	FTP Site	PeopleTools->Administration->URLs ->URL Identifier: RY_ ATTACHMENTS	ftp://[user ID:pwd@]<host name>[:port]/[path name]	21
PIA to DES	DES HTTP and HTTPS	URL for IB node PSFT_OLM	http://<des webserver>:port /DCS/DlgBroker	none
End User to DES		defaultURLBase	http://<des webserver>:port /DCS/mcp?p=...	none

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Communication Direction	Port For:	DES Configuration Parameter	Value	Port Default Value
DES Clustering	loadbalancer	jmsProviderUrl	t3://<loadbalancer ip : loadbalancer port>	none
		directURLBase	http://<des webserver: not loadbalancer port>	none
DES to Mail Service or Process Scheduler to MCR, WDG and ERP	RMI	rmiPort	[number]	1099
DES to Mail Service or Process Scheduler	RMI	HAS_FIREWALL	true/false	false
		FIREWALL_PORT	[number]	none
DES, MCR, WDG and ERP to Database Server	Database	dbServerURL	MSSQL:jdbc:sqlserver: //serverName: port;DatabaseName= instance;sql70=true;charset= Cp1252 ORACLE: jdbc:oracle:thin: @host:port:instanceDB2UDB: jdbc:db2://host:port/instance	MSSQL: 1433
Mail Service to SMTP	SMTP	smtpServerNames	<SMTP hostName>[: portNumber]	25
	POP account			110
WDG	WDG	qkLookPort	http://<wdg_host>[: qkLookPort]	6700

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APPENDIX B

Getting Started with CRM for Higher Education

To fully benefit from the CRM for Higher Education functionality, Oracle recommends that you integrate CRM 9.1 with Campus Solutions 9.0 Feature Pack 2 or higher.

The following lists the features that CRM 9.1 Integrates with Campus Solutions 8.9 and 9.0:

- Limited Prospect Data is pushed from Campus Solutions to CRM.
- Full Sync only for a limited set of Campus Solutions admissions data.
- Both full and incremental PersonBasic Sync.
- Search/Match duplicate prevention with PersonBasic Sync.
- 360 degree view with CRM transactions only
- Full functionality of the CRM System with respect to contact management, mass communications, campaign and event.
- Audience building using PeopleTools Query Access Services provided that both CRM and Campus Solutions are running on PeopleTools 8.5 or higher.

The following information details the features that the CRM 9.1 Integration with Campus Solutions 9.0 Feature Pack 2 provides over the CRM 9.1 Integration with earlier versions of Campus Solutions.

The following lists the features that CRM 9.1 Integrates with Campus Solutions Feature Pack 2 (or higher):

- Control table loading (including Academic Structure, Test IDs, and Test components) synced over to CRM.
- Security constructs (such as Test ID by User, Institution, Career, Program and Plan security by User, etc) synced over from Campus Solutions to CRM so that security in CRM is consistent with Campus Solutions.
- New Prospective Student Import feature allowing fast bulk loading of Suspect and Prospect data into CRM from Campus Solutions, Campus Solutions Test.
- Constituent 360 degree overall view of Student combining CRM and Campus Solutions data.
- Action links to select Campus Solutions pages from Service Center for Higher Education and 360 degree view.
- Real time integration of Prospect, Applicant, and Student data from Campus Solutions to CRM, via incremental syncs.
- Full Constituent Lifecycle support from Suspect and Prospect through to Applicant, Student, and Alumnus.

To use the Query Access Services (QAS) to build audiences in CRM based on criteria in Campus Solutions, you need both the CRM and Campus Solutions systems to be running on PeopleTools 8.52 or higher. With the exception of QAS, all other functionality will work if CRM is on PeopleTools 8.52 or higher, and Campus Solutions is on an older version of PeopleTools.

When installing the CRM products, deselect the Higher Education version to enable all the Higher Education specific display templates.

The following is an example of the General Options page that shows the Product Options for Higher Education:

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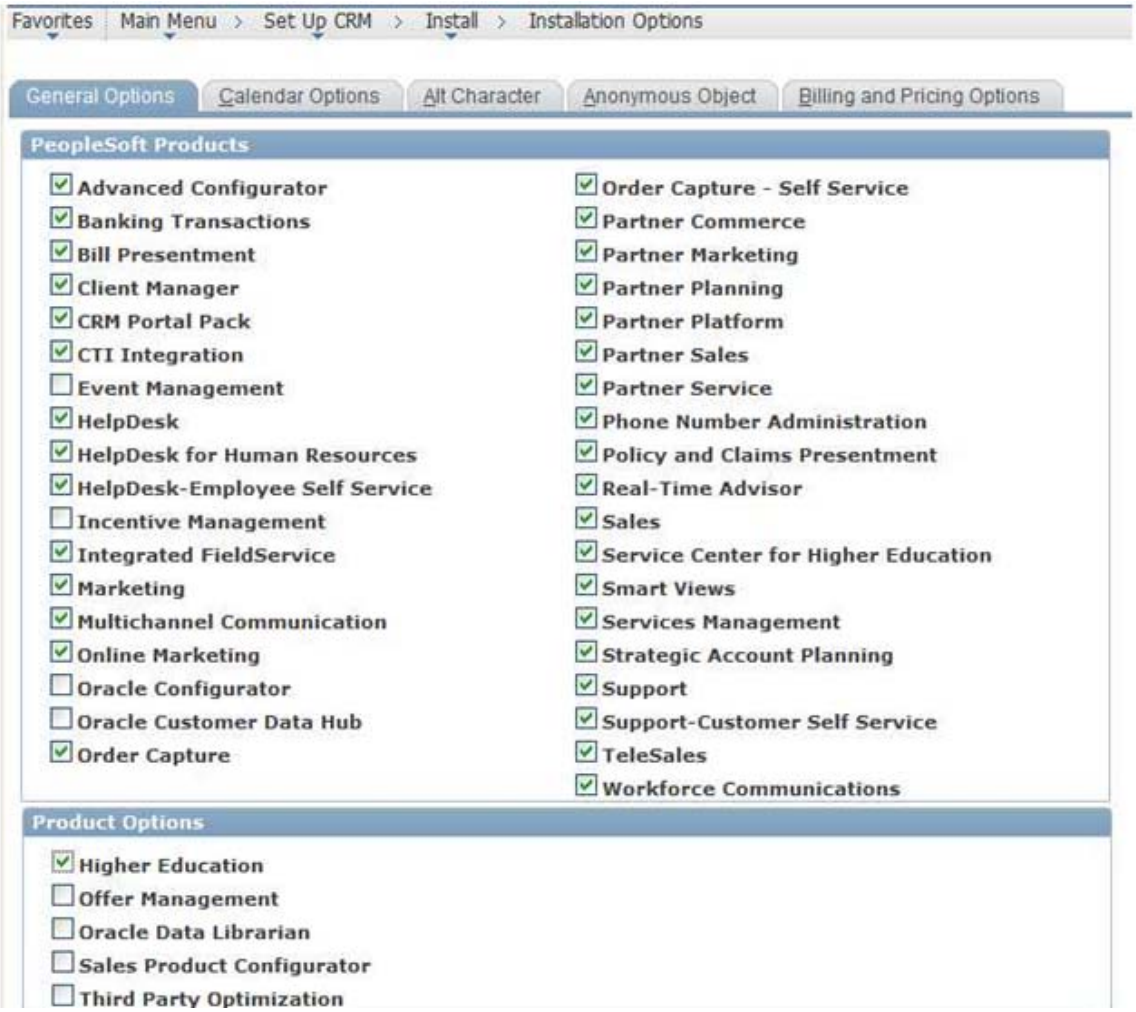

General Options for Higher Education

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